

progressive

# Shetland Islands Visitor Survey 2017

Shetland Islands Council and  
VisitScotland

March 2018



**Shetland**  
Islands Council

# Contents



Project background



Trip characteristics



Objectives



Visitor experience



Method and analysis



Volume and value



Visitor profile



Comparisons to previous years



Visitor journey



Summary and conclusions

# Project background



- Tourism is important to the local economy on Shetland, particularly for small businesses on the islands.
- Shetland Islands Council has developed its strategy for economic development 2018-2022 with key tourism business objectives, including sustainable growth, continuous development of high quality tourism products and extending the season.
- Strategies to achieve these objectives need to be based on sound intelligence about the volume, value and nature of tourism to the islands, as well as a good understanding of how emerging consumer trends are influencing decisions and behaviours, and impacting on visitors' expectations, perceptions and experiences.
- Shetland Islands Council, in partnership with VisitScotland, commissioned Progressive to conduct a visitor survey on the Shetland Islands to provide robust and up-to-date estimates of visitor volume and value, as well as information on experiences, motivations, behaviours and perceptions.
- Progressive conducted a similar visitor survey on behalf of Orkney Islands Council and Comhairle nan Eilean Siar. This report details findings from the Shetland Islands visitor survey only.



# Project objectives



- The research data was gathered using a 2 stage approach:
  - Stage 1 – Calibration interviews conducted face-to-face with visitors at key exit points from the islands – ferry terminal and airport
  - Stage 2 – Follow-up online survey to gather more detailed feedback
- Stage 1 - Calibration Interviews
  - The calibration interviews were conducted using CAPI technology (Computer Aided Personal Interviewing)
  - Each interview lasted approximately 3 minutes
  - Data gathered included profiling data and type of trip – leisure, visiting friends and relatives (VFR), business
  - Sampling was spread across 2017 - 29<sup>th</sup> January to 14<sup>th</sup> December.
  - The sampling points were Sumburgh Airport and Holmsgarth Ferry Terminal.
  - A random sampling approach was utilised to achieve a representative sample of people leaving the islands in terms of visitors and island residents.
  - In total, 5,088 calibration interviews were completed – 2,434 visitors; 2,571 island residents; 83 other.

- Stage 2 - Online Survey
  - Respondents were asked if they would like to take part in an online survey at the end of the calibration interview
  - Email addresses were gathered and the survey was sent within a two-week period of the calibration interview, allowing them time to arrive home
  - In total, 1,961 visitors to Shetland agreed to take part in the online survey. 122 email addresses bounced back leaving a potential sample size of 1,839.
  - The online survey remained open for 3 weeks for each visitor
  - A reminder was sent halfway through the 3-week period
  - The final sample response was 854 completed online surveys (46% response rate)
- Additional stage - Qualitative interviews
  - A small number of tele-depths were also conducted with respondents who agreed to take part in a follow-up discussion about their visitor experience – 6 tele-depths with visitors to Shetland
  - These provided some qualitative insight on the visitor experience and potential areas for improvement
  - Each lasted 30-40 minutes in length

# Analysis

## Statistical validity



- The margins of error associated with the data are detailed below. These are calculated at the 95% confidence interval (market research industry standard).

Sample type	Sample size	Margin of error
Total Calibration	5,088	+/- 0.26% to +/- 1.33%
Total Sample of Visitors - Calibration	2,434	+/- 0.39% to +/- 1.95%
Total Sample - Online	854	+/- 0.66% to +/- 3.33%
Leisure Visitors – Online	551	+/- 0.82% to +/- 4.14%
VFR Visitors – Online	105	+/- 1.89% to +/- 9.51%
Business Visitors - Online	198	+/- 1.38% to +/- 6.94%

- All bases shown are the unweighted bases. Bases vary by question depending on routing. Where base sizes are low a caution sign is shown. 
- Where figures do not add to 100% this is due to multi-coded responses or rounding.
- On some charts figures of 0% and 1% are not shown for ease of reading.
- Only statistically significant differences are reported.

# Analysis

## Sub-sample analysis



- The analysis detailed in this report includes highlighting statistically significant differences between sample sub-groups.
- Analysis by visitor type is provided on the total sample - Leisure, visiting friends and relatives (VFR), Business
- Analysis for other sub-groups is shown for the Leisure sample only. These sub-groups are:
  - Origin 1 – Scotland; rest of UK; all overseas
  - Origin 2 – Scotland; rest of UK; Europe; North America; other overseas
  - Gender – male; female
  - Age – 16 - 34; 35 - 44; 45 – 54; 55 – 64; 65+
- The sample sizes for each sub-group (online sample) are detailed below:

Visitor type	Base (unweighted)
Leisure	551
VFR	105
Business	198

Origin (Leisure)	Base (unweighted)
Scotland	131
Rest of UK	211
All overseas	205
Europe	102
North America	52
Other overseas	51

Demographics (Leisure)	Base (unweighted)
Male	240
Female	311
16 – 34	77
35 – 44	40
45 – 54	96
55 – 64	151
65+	185

# Sample

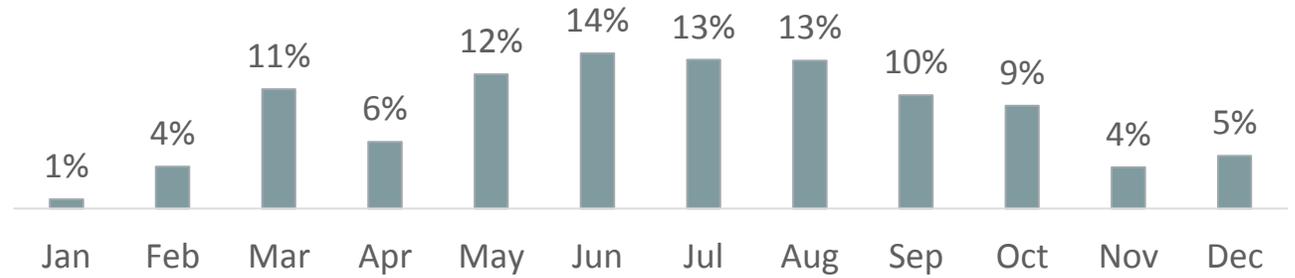
- The sampling plan was designed to provide a spread of interviews across exit points and months of the year.
- Interviewing was therefore higher in the peak season months of June to August.
- Passenger data by exit point was not available for all exit points at the start of the project, therefore, the sampling aimed to achieve a broad spread across points. Passenger data obtained at the end of 2017 indicated that the sample over-represented Holmsgarth Ferry Terminal and under-represented Sumburgh Airport. Weighting was, therefore, used to correct the data for these inconsistencies with actual passenger numbers.



## Sampling point



## Month



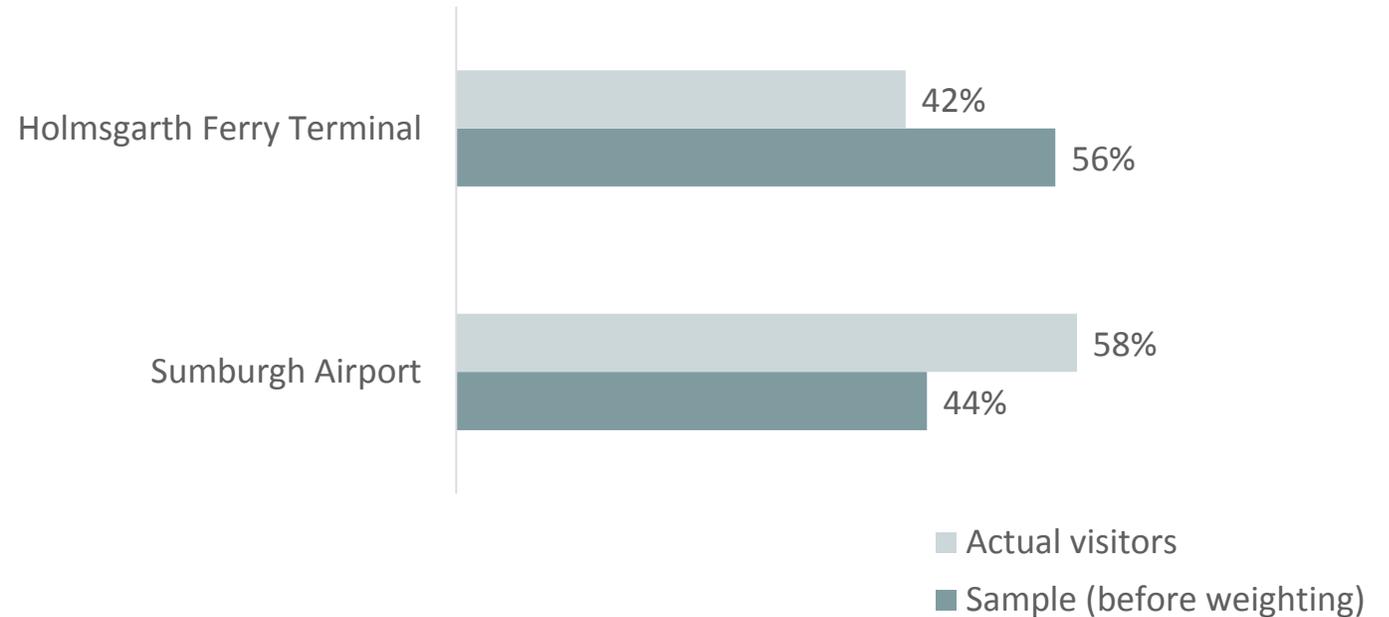
Base (All): 5,088

# Data weighting

## Calibration survey

- The calibration data was weighted by sampling point to reflect the actual distribution of visitors in 2017.
- Passenger data was provided by VisitScotland (from Northlink) and from HIAL.

### Sampling point



Base (All): 5,088

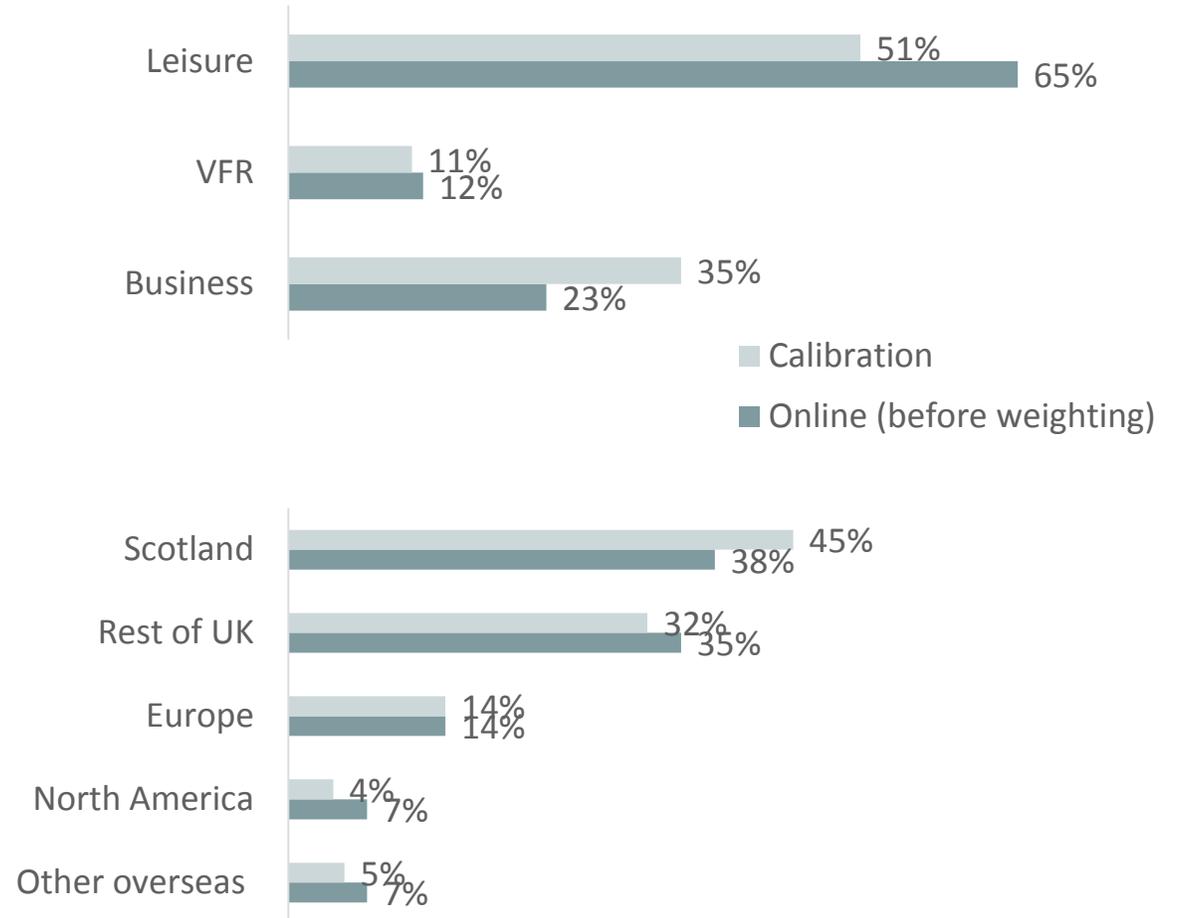
# Data weighting

## Online survey

- Due to the larger sample size and the random sampling approach to data collection, the calibration data is more accurate than the online data.
- Respondents to online surveys are also self-selecting, which can skew data.
- The profile of the online sample was, therefore, weighted to the calibration data to ensure it was representative in terms of visitor type and origin.
- As the data here shows, the online data was, in fact, broadly similar to the calibration, the main adjustment being corrected was for under-representation of Business and Scotland visitors and over-representation of Leisure and rest of UK visitors.

\*Note: The percentage in 'other' category (3%) from the calibration survey was distributed evenly across Leisure, VFR and Business codes for online weighting as no 'other' code was available online for reasons of routing.

## Visitor type and origin



Base (All): Calibration 2,434, Online 854



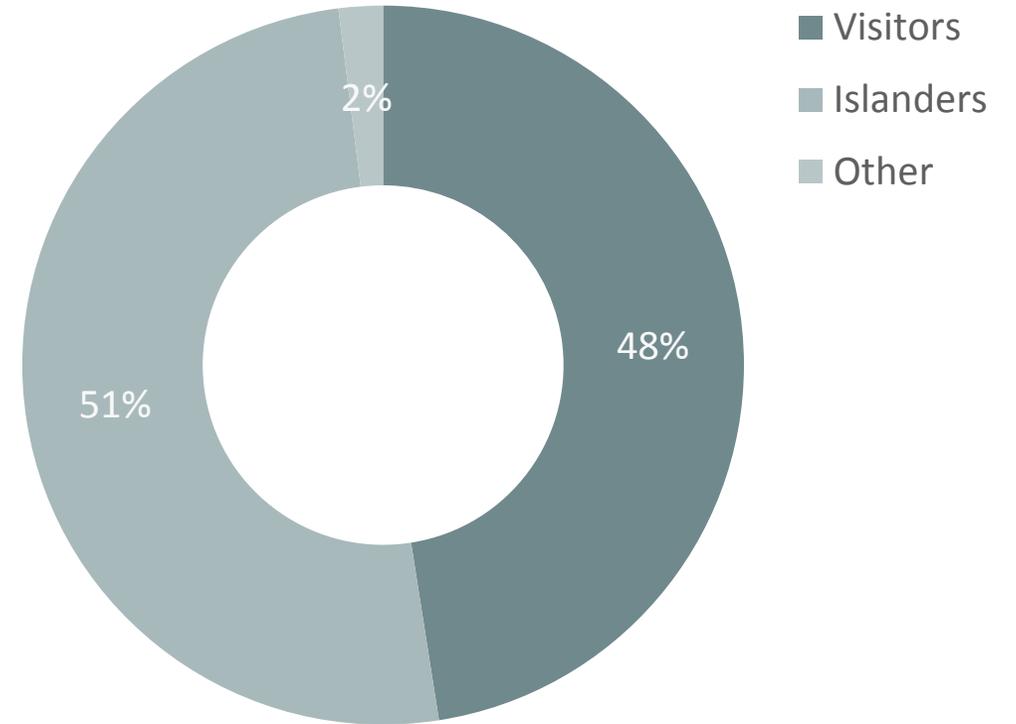
# Visitor profile

# Visitor profile

## Proportion visitors

- Just less than half of all people interviewed for the calibration survey were visitors to Shetland.
- Half were islanders and 2% were people in transit between islands; haulage drivers only visiting for the day; or people on a cruise or yacht trip.

## Islanders vs visitors



Base (All Calibration): 5,088

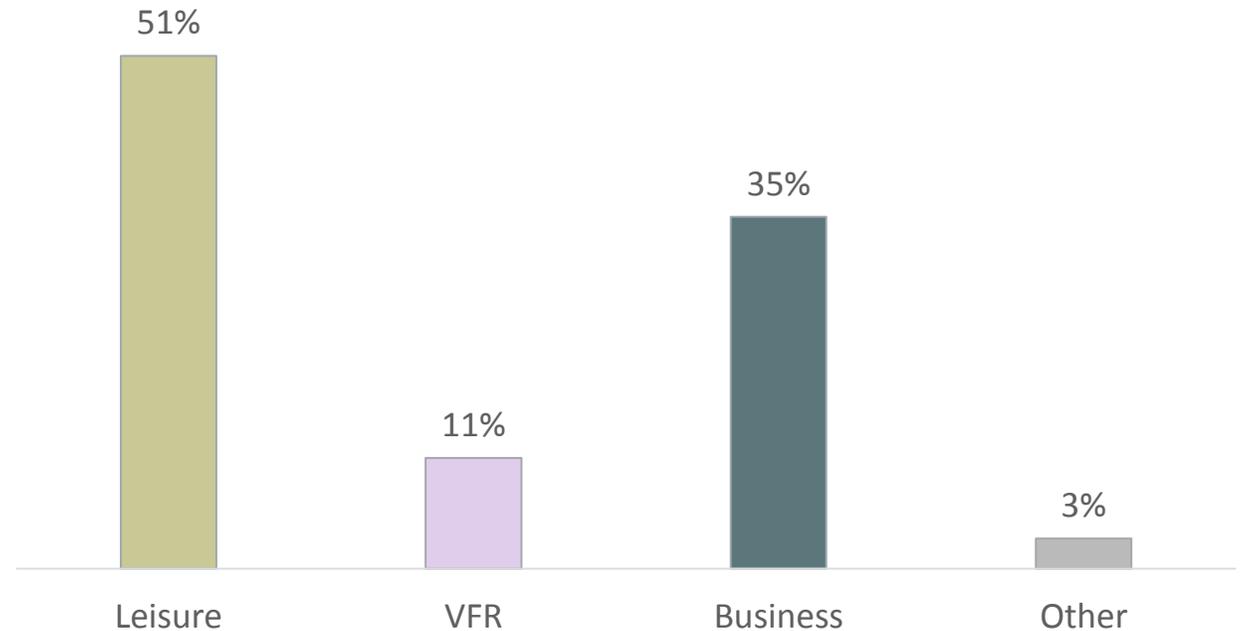
# Visitor profile

## Trip purpose

- The largest proportion of visitors to Shetland in 2017 were leisure visitors (51%). Approximately one third were visiting for business or work purposes, while 11% were visiting friends or relatives (VFR).



## Trip Purpose

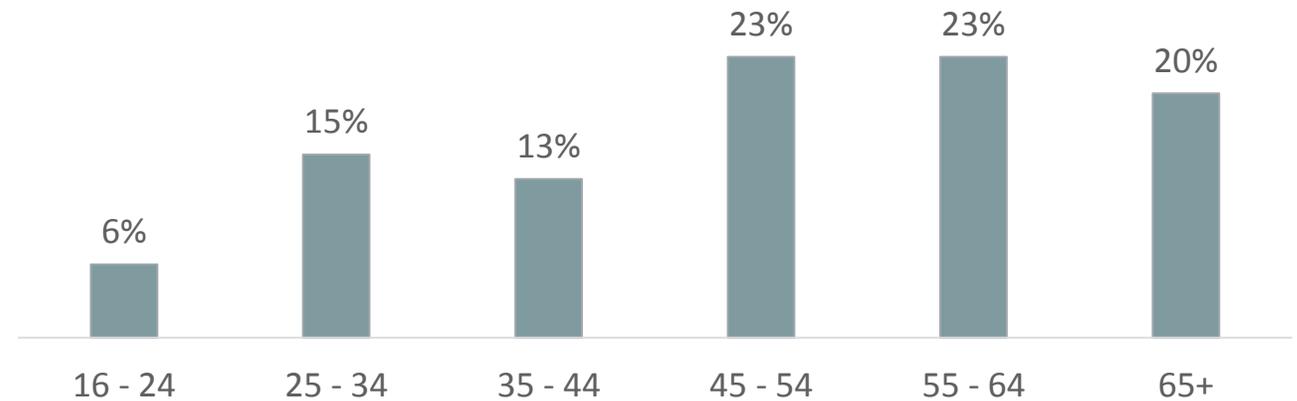
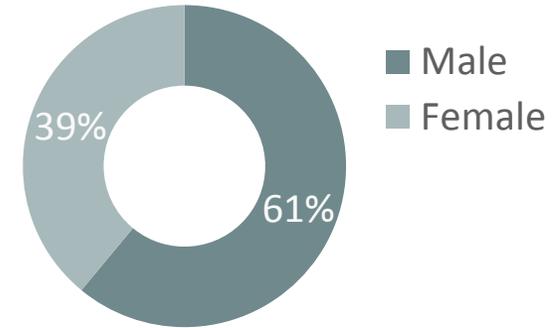


# Visitor profile

## Demographics

- The total sample of visitors to Shetland was skewed towards males (61%). This finding was influenced by the proportion of males amongst business visitors (85%). Leisure visitors were almost evenly split between males (48%) and females (52%). VFR visitors were less likely to be males (42%).
- The majority of visitors were aged over 45 years old (66%), with 28% aged between 25 and 44 and only 6% 16 to 24.

## Age and gender



Base (All calibration visitors): 2,434

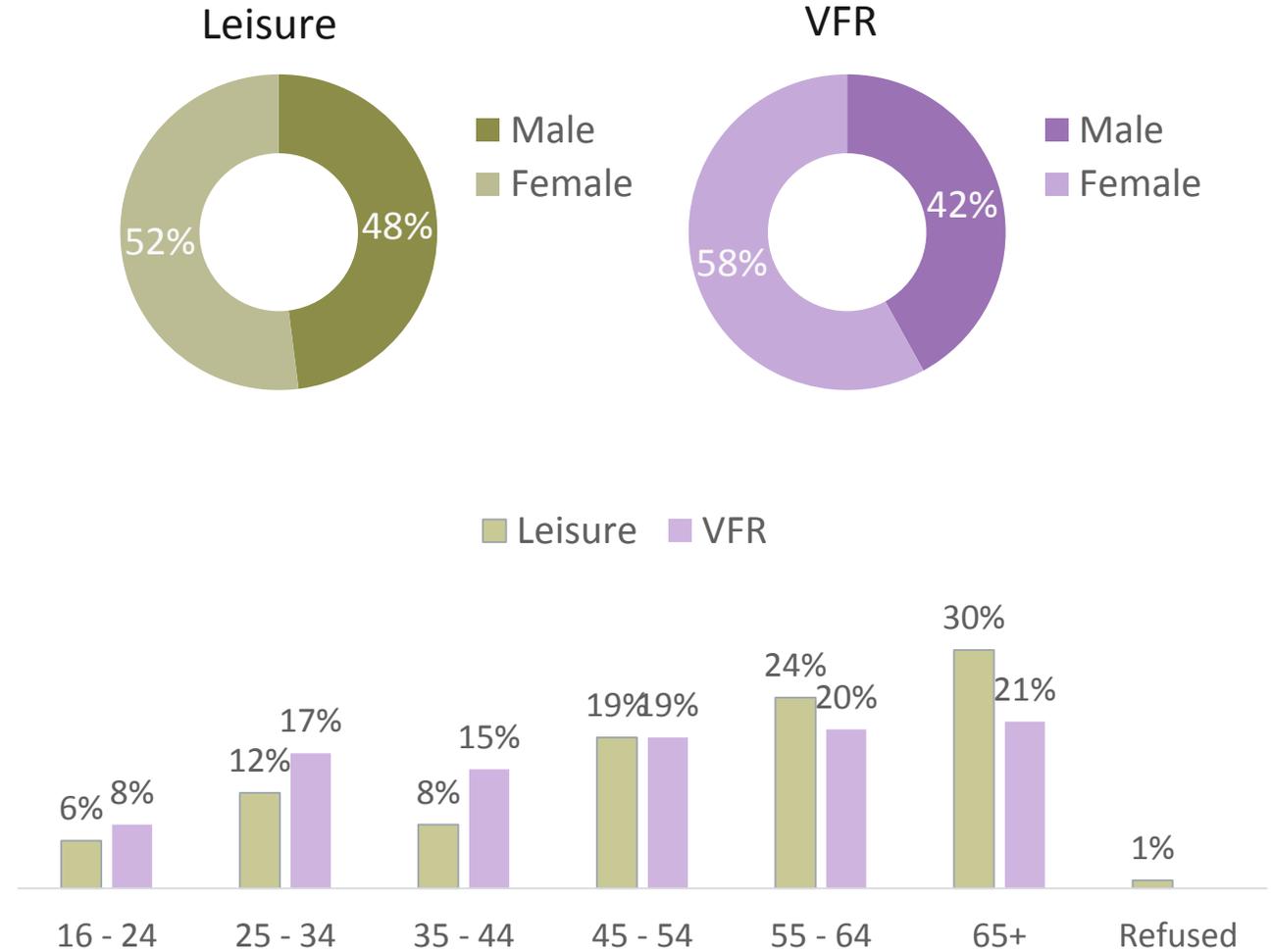
# Visitor profile

## Demographics

- Leisure visitors were more evenly split between males (48%) and females (52%) than VFR visitors (42% male and 58% female).
- The age profile of VFR visitors was also slightly younger than Leisure visitors; 26% were less than 45 years old, compared to 40% of Leisure visitors.



### Age and gender



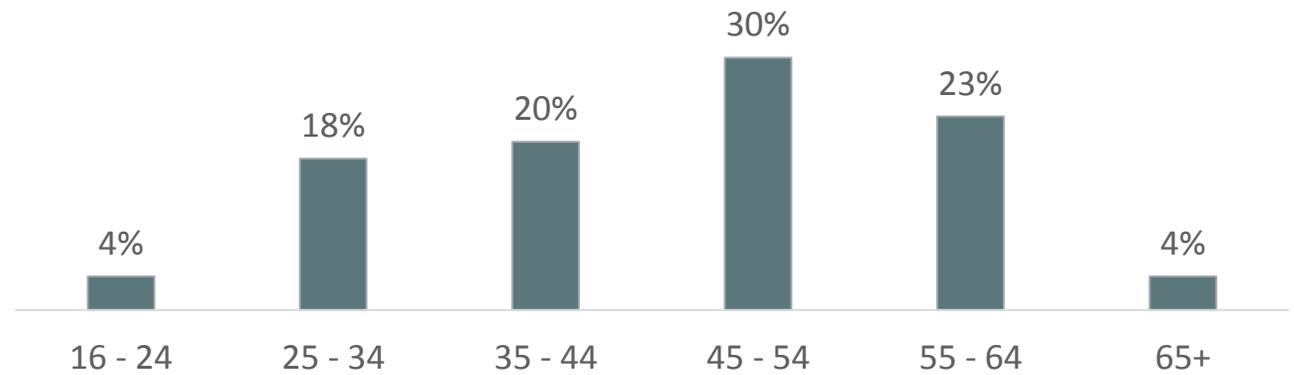
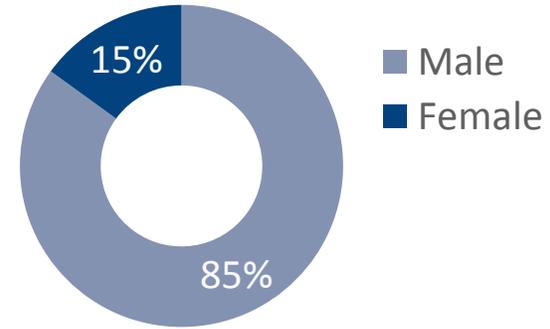
Base (All Leisure / VFR calibration visitors): Leisure 1,329, VFR 243

# Visitor profile

## Demographics

- Business visitors were predominantly male (85%).
- There was a wide spread of age groups for business visitors with 57% aged 45 years or older and 42% under 45.

### Age and gender - Business



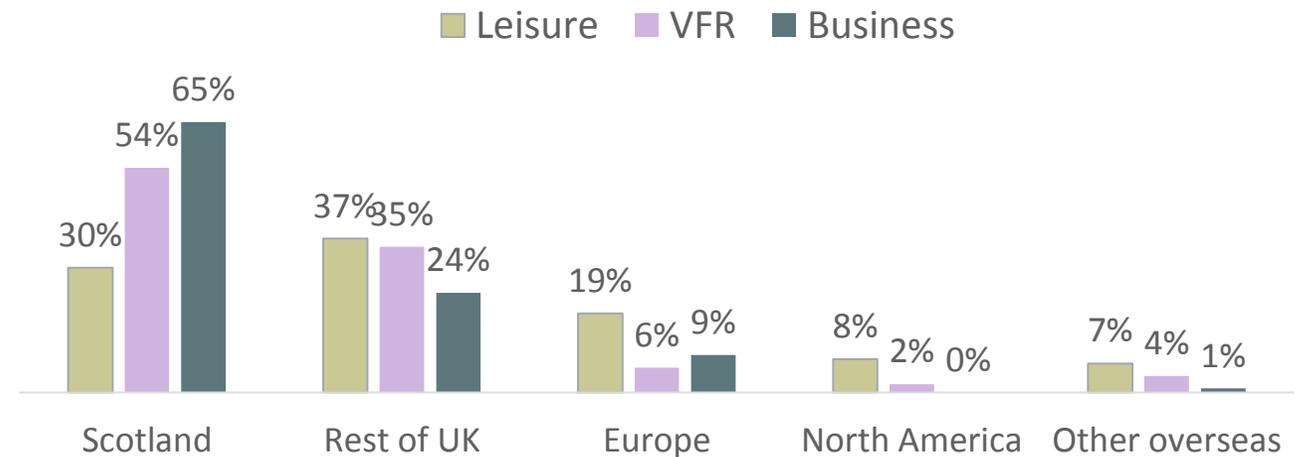
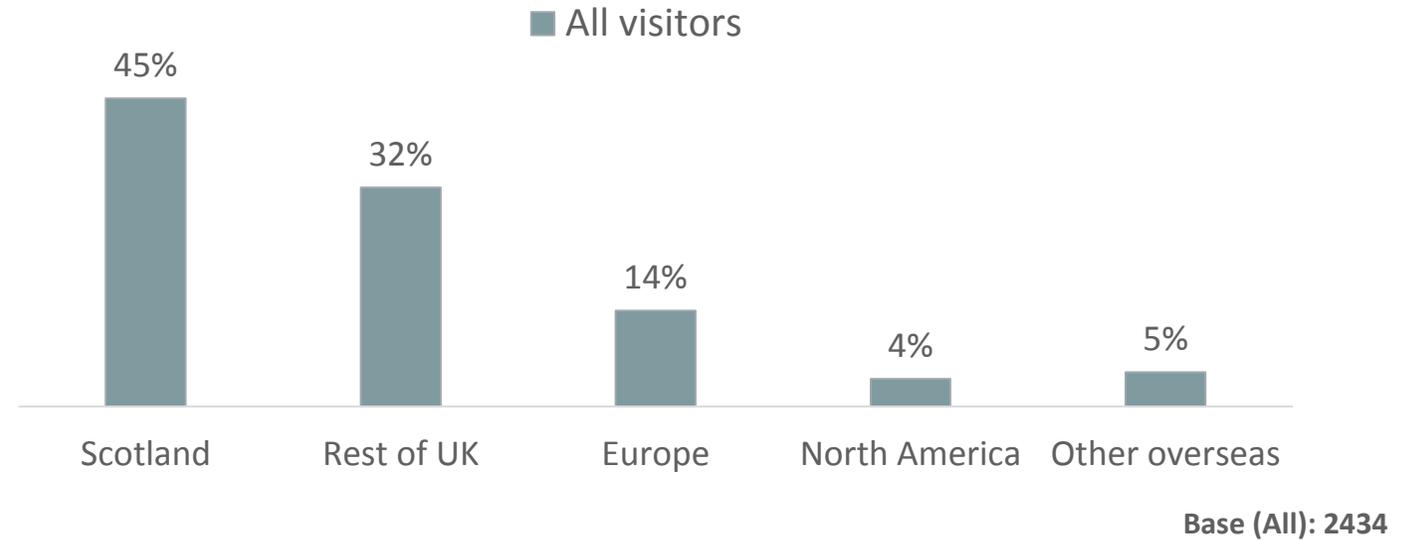
Base (All Business calibration): 796

# Visitor profile

## Origin

- The majority of all visitors to Shetland in 2017 were from the UK (77%), with 45% from Scotland and 32% from the rest of the UK.
- Of the 23% overseas visitors, the largest proportion was from Europe (14%), with a further 4% from North America, 4% from Australia/New Zealand and 1% from other countries.
- Amongst Leisure visitors the proportion of rest of UK visitors was highest (37%) and the proportion of visitors from Scotland was lowest (30%). This contrasts with VFR and Business visitors, who were predominantly from Scotland.

## Origin

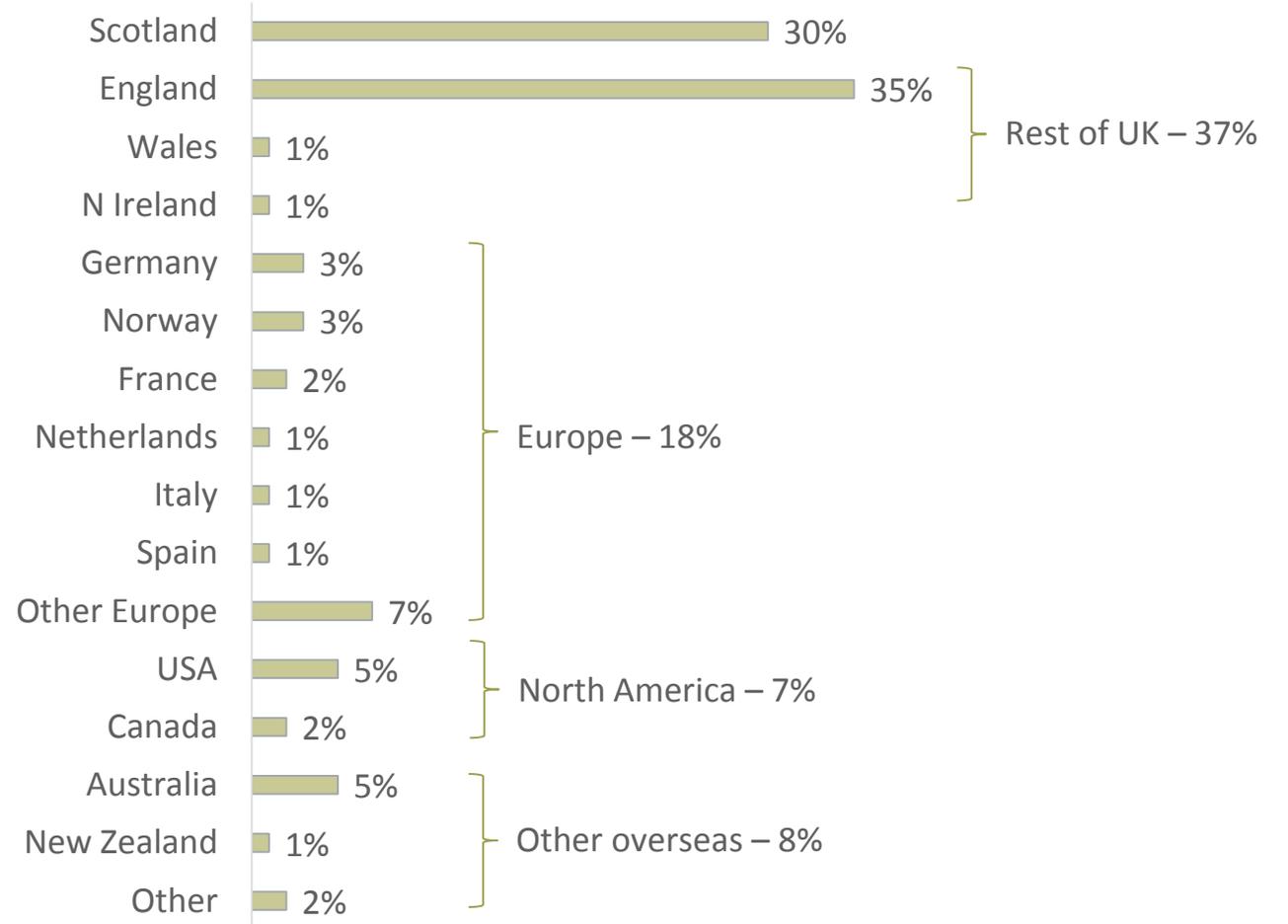


# Visitor profile

## Origin

- The most prevalent European Leisure visitors were from Germany (3%) and Norway (3%).
- The USA accounted for 5% of Leisure visitors, and a further 5% were from Australia.
- European visitors are less likely to be older than visitors from other countries (15% over 65), compared to the overall average for all Leisure visitors of 33% over 65.

## Origin – Leisure visitors



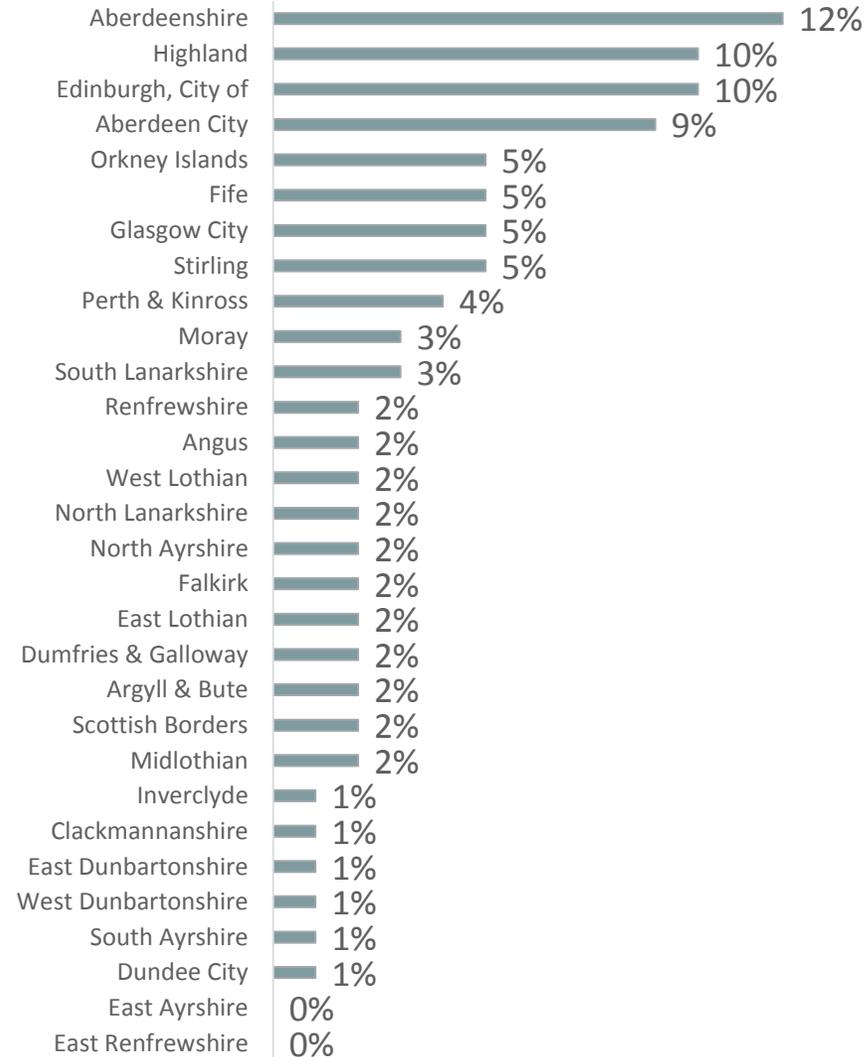
Base (All Leisure calibration): 1,329

# Visitor profile

## Origin

- The largest proportion of visitors from Scotland came from the Aberdeenshire Council area (12%).
- Around one tenth of visitors from Scotland each came from the Highland, Edinburgh and Aberdeen areas.
- This profile of visitors was very similar across Leisure, VFR and Business visitors.

## Origin – Scotland visitors



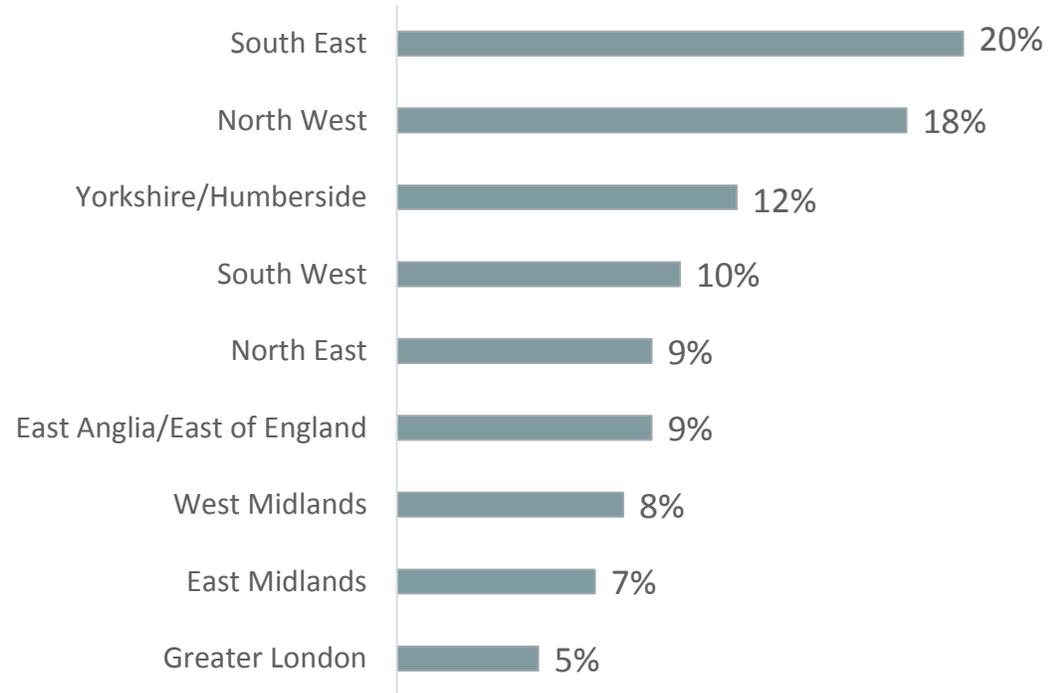
Base (All Scotland visitors): 326

# Visitor profile

## Origin

- Visitors from England came from a variety of regions.
- The top origin locations were the South East, North West, Yorkshire/Humberside and the South West.
- There were no substantial differences in these findings between Leisure, VFR and Business visitors.

## Origin – England visitors



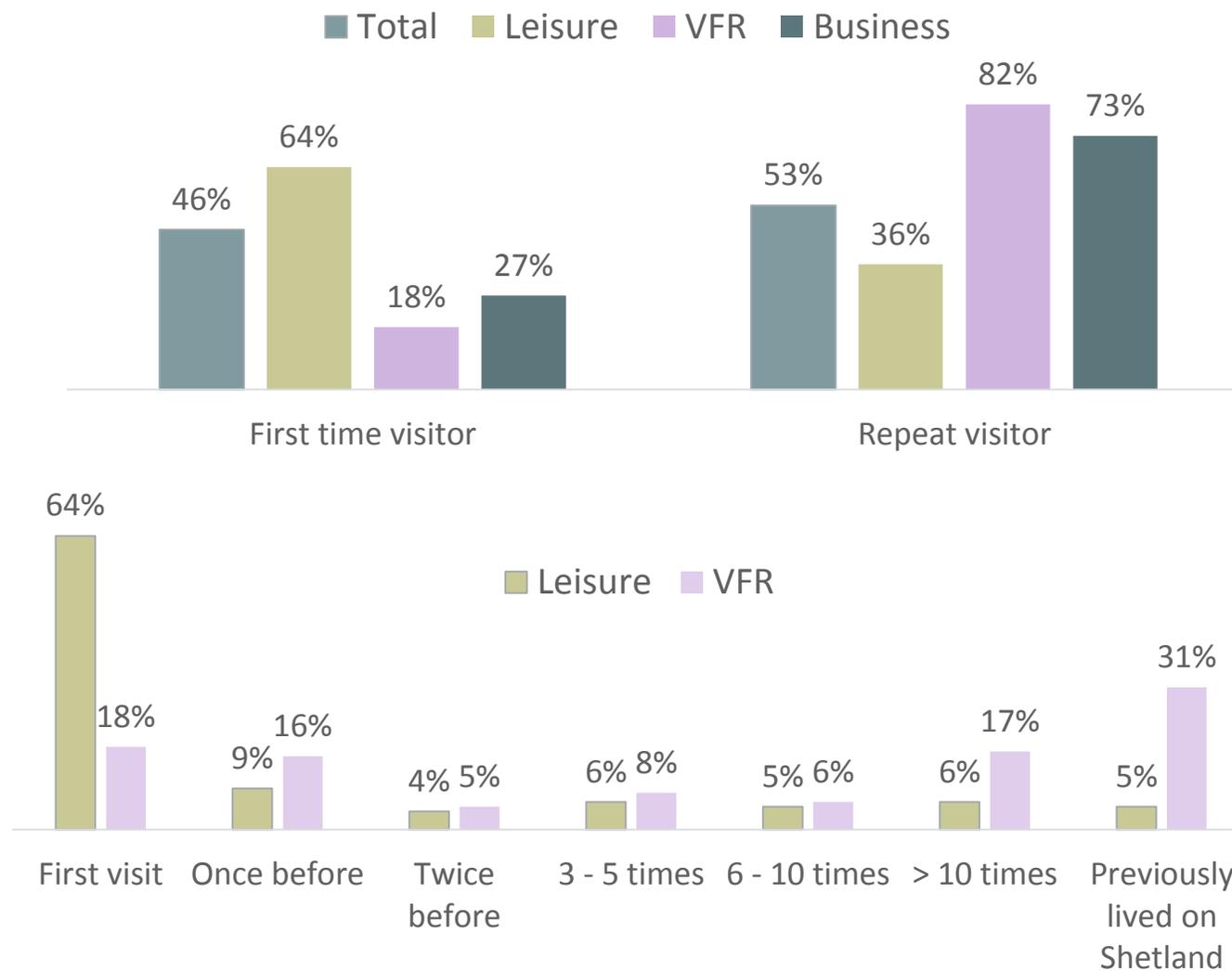
Base (All England visitors): 279

# Visitor profile

## First time/repeat visitors

- Just over half of visitors to Shetland reported that they had been to the islands before, while just under half were on their first visit.
- Almost two thirds of Leisure visitors were first time visitors, while the majority of VFR (82%) and Business (73%) visitors had been before.
- Amongst the Leisure visitors, overseas visitors were more likely to be first time visitors (80%) than Scotland (44%) or rest of UK visitors (62%).

## Number of times visited Shetland



Q16: Approximately how many times have you visited Shetland before your recent trip?

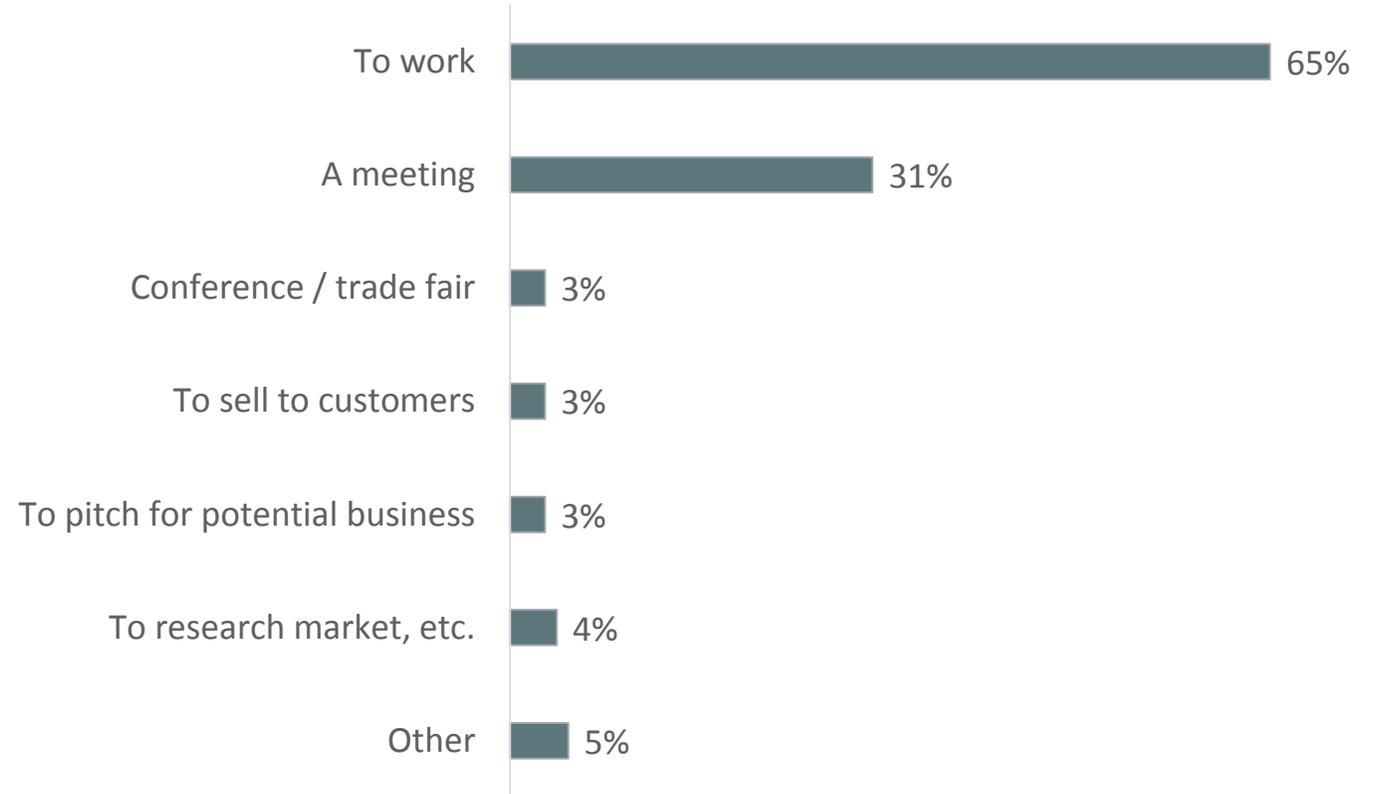
Base (All, excl. rotation shift workers): Total 825; Leisure 551; VFR 105; Business 169

# Visitor journey

## Business journey

- The largest proportion of Business visitors had been to Shetland to work for a period of time.
- A further one third were attending a meeting.

## Reason for visiting Shetland - Business

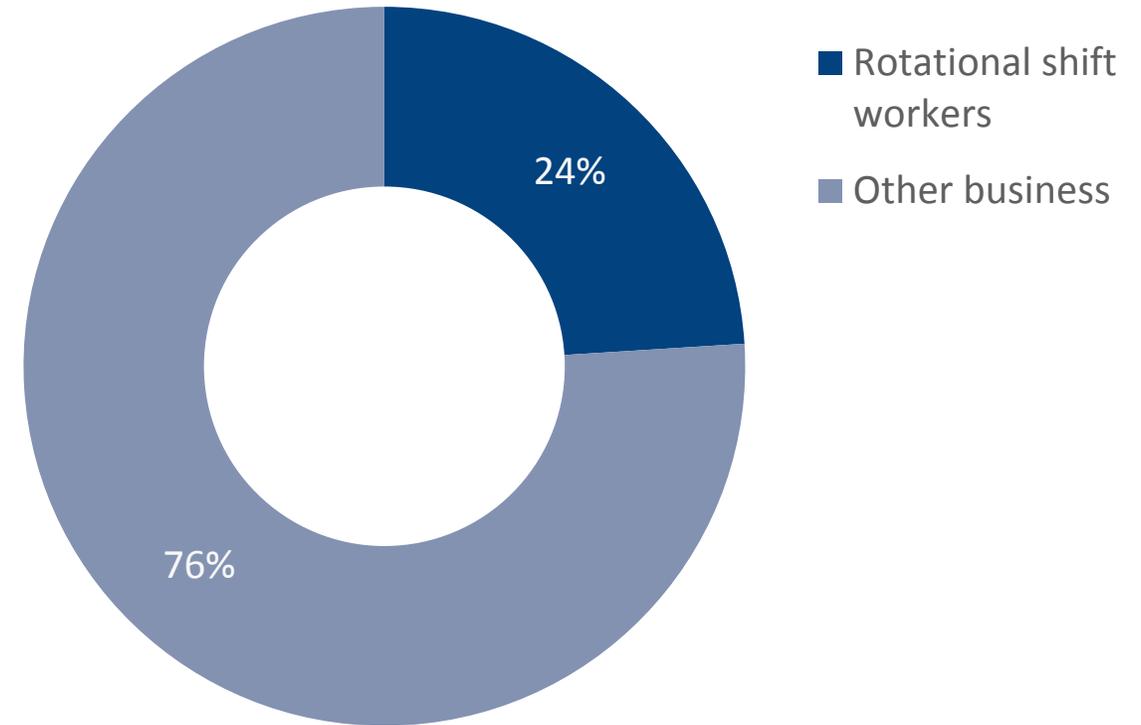


# Visitor profile

## Business

- Overnight Business visitors were asked if they would be staying on the islands for an extended period of time, but normally live on the mainland. Just under one quarter of business respondents stated that they were staying for a long period of time.

## Rotational shift workers



CQ3b: Was your visit to this island to work for an extended period of time, but you normally live on the mainland, e.g. you are on a rotational shift pattern?

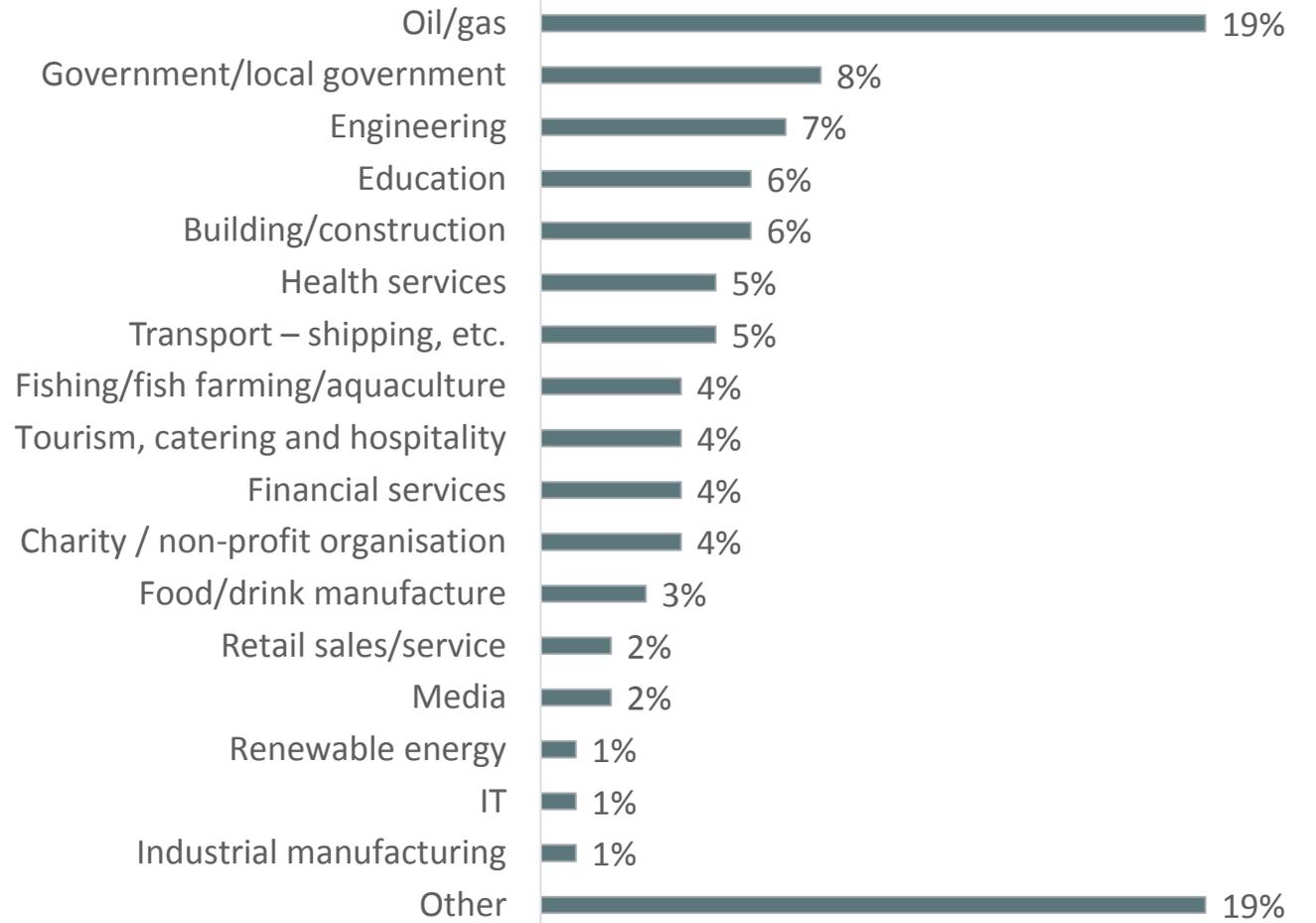
Base (All business calibration): 671

# Visitor profile

## Business

- A wide range of business sectors were cited by Business visitors. The most prevalent by far was oil/gas. Other sectors mentioned included government/local government, engineering, education and building/construction.
- Other sectors mentioned that were not on the list provided were the environment/conservation, security, farming, agriculture, entertainment and the arts industry.

## Business sector



Base (All business): 198

# Visitor profile

## Summary



- Around half of visitors to Shetland in 2017 were visiting for leisure purposes, while 11% were visiting friends and relatives and 35% were on a work/business trip.
- The profile of all visitors was skewed to males (61%) and those aged 45 years or older (66%).
- A high proportion of Business visitors were male (85%), compared to Leisure (48%) and VFR (42%) visitors.
- The majority of visitors (77%) come from the UK – with 45% from Scotland and 32% from the rest of the UK.
- Amongst Leisure visitors, 67% were from the UK (30% Scotland; 37% rest of UK). Overseas Leisure visitors were predominantly from Europe (19%), with many also visiting from North America (8%) and Australia/New Zealand (7%).
- Almost two thirds of Leisure visitors were visiting Shetland for the first time.
- VFR (82%) and Business visitors (73%) were more likely to be repeat visitors to the islands.



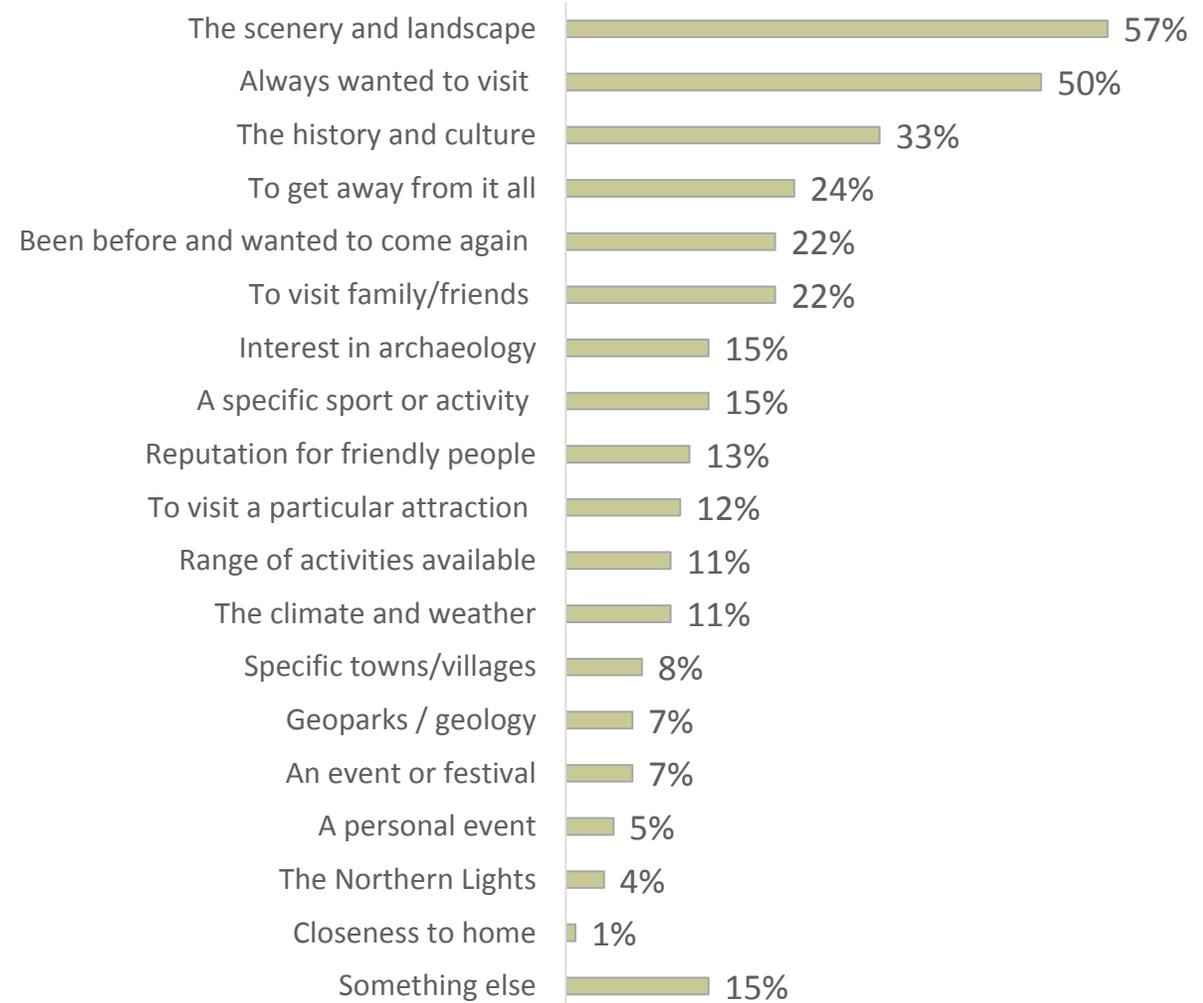
# Visitor Journey

# Visitor journey

## Motivations

- The key reasons for visiting Shetland cited by Leisure visitors were the scenery and landscape (57%) and always wanted to visit (50%).
- The history and culture also featured highly, being mentioned by a third, while almost a quarter just wanted to get away from it all.
- Visiting friends and family on the islands was most often mentioned by visitors from Scotland (39%).
- North American visitors (58%) were the most likely to select history and culture. Visitors from overseas (68%) and the rest of the UK (59%) were more likely to mention scenery and landscape than those from Scotland (41%).
- Getting away from it all and going to see the Northern Lights were more likely to be mentioned by younger respondents than older respondents.

## Reasons for visiting Shetland - Leisure visitors



Q1: What were your main reasons for visiting Shetland for your recent trip?

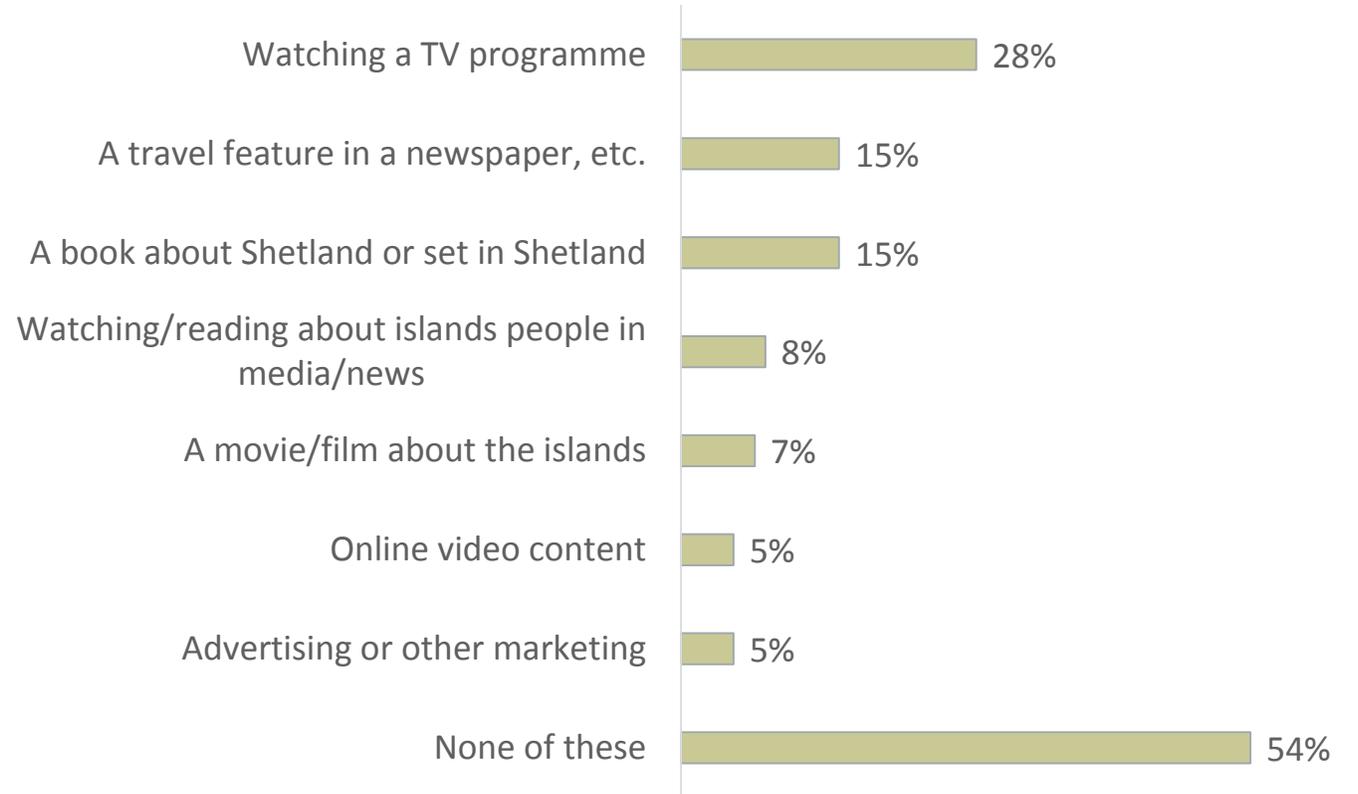
Base (All Leisure): 551

# Visitor journey

## Inspiration

- Just under half of Leisure visitors reported that they had been inspired to visit Shetland by something they had seen or read.
- TV programmes were mentioned by 28% of respondents. These included the Shetland detective series, Coast and An Island Parish.
- Books about Shetland were reported to have inspired 15% of Leisure visitors. These included Anne Cleeves Shetland series, Christopher Mylne's Foula The Times of My Life, 60<sup>0</sup> Degrees North and Between the Weather: Travel in Shetland.
- Overseas visitors were more likely to be inspired by books, films, TV, etc. (61%) than those from Scotland (27%) or the rest of UK (44%).
- 20% of overseas visitors overall mentioned being inspired by a travel feature, 35% mentioned being inspired by watching a TV programme and 23% were inspired by a book.
- TV programmes and reading books about the islands were also more inspiring to people over 45 years than people under 35.

## Inspiration for visiting Shetland - Leisure visitors



# Qualitative Findings

## Reasons for visiting Shetland



Qualitative respondents gave a variety of reasons for visiting Shetland.

*I visited Orkney the previous year and someone told me Shetland was even nicer.*

*I heard of Shetland Wool Week so went for that.*

*It was on my bucket list, something I really wanted to do.*

*Never been before so we went for our honeymoon as wanted something a bit different.*

*Wanted to see more of Scotland so I decided to start at the top and work my way down.*

*If you go far enough back in my family tree, our family originally came from the Shetlands... so it's always been on my list of places to visit.*

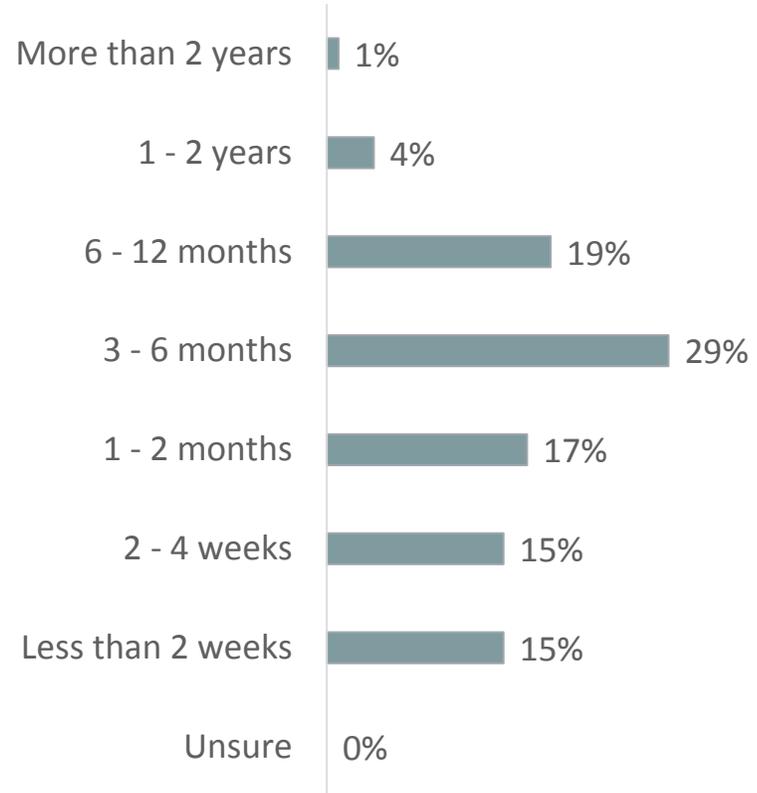
*I was drawn to the remoteness of it, it's not your typical holiday destination full of tourists and its off the beaten track, which I like as I am not the typical traveller.*

# Visitor journey

## Planning

- Across the total sample of all visitors the majority (76%) planned their visit to Shetland within 6 months of travel.
- Almost a third of visitors planned their visit within one month of travel, suggesting that many people visited based on a fairly last minute decision.
- However, the level of advance planning varied by visitor type, with Leisure visitors the most likely to plan a long time in advance and Business visitors the most likely to make plans close to their date of departure. Full details of planning by each visitor group are shown over.

## How far in advance did you plan your trip?



Q4: How far in advance did you start planning your trip? I.e. how much time was there between you starting to plan and actually visiting?

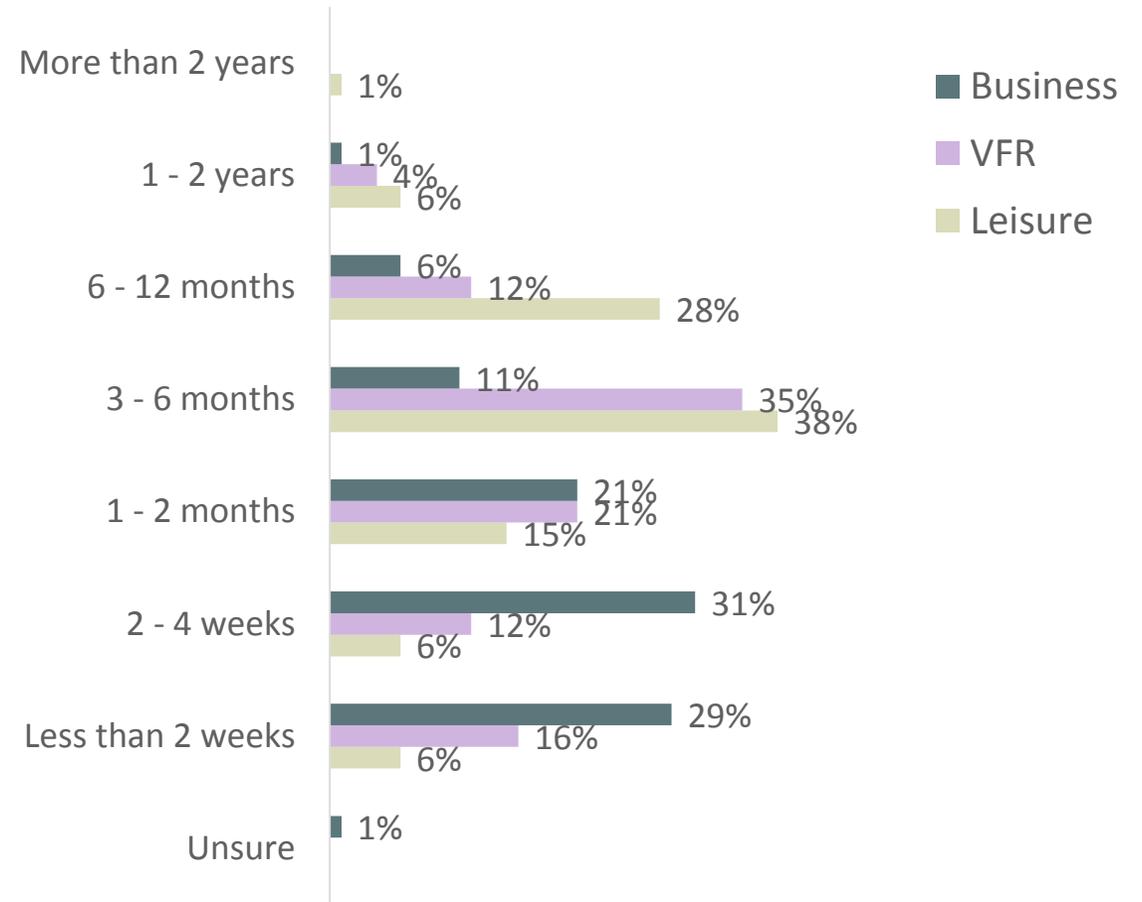
Base (All except rotational shift workers): 825

# Visitor journey

## Planning

- Leisure visitors showed the highest levels of advance planning – just over a third planned more than 6 months before their visit and a further 38% started their planning 3 to 6 months in advance.
  - Leisure visitors from Scotland were the most likely to start planning within a month of travel (25%). Visitors from North America (51%) were the most likely to plan more than 6 months in advance.
- By contrast VFR visitors were more likely to plan their visit less than 3 months before – half decided on their visit less than 3 months before.
- As we might expect, Business visitors had the lowest levels of advance planning. Indeed, 60% of Business visitors started planning their trip within one month of travel.

## How far in advance did you plan your trip? – by visitor type



Base (All except rotational shift workers):  
Leisure 551; VFR 105; Business 169

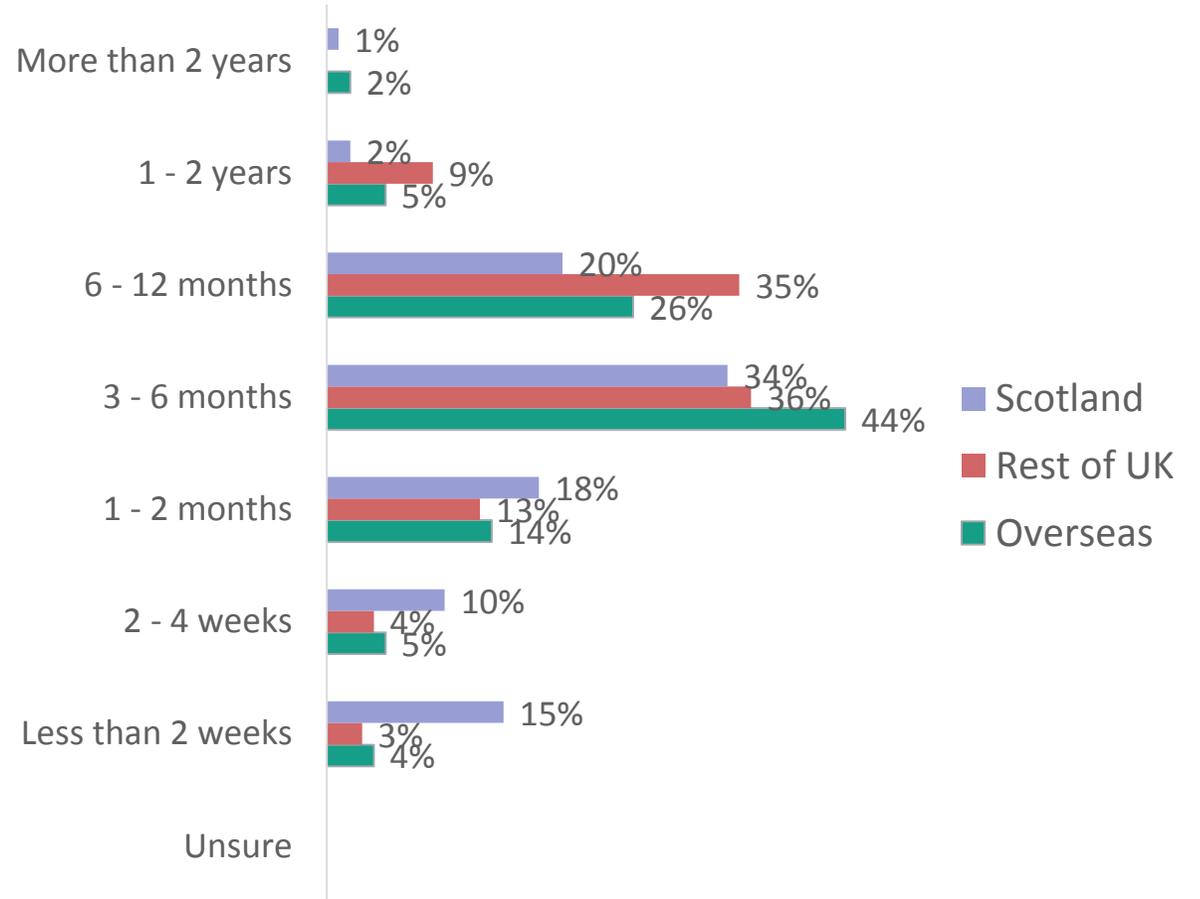
Q4: How far in advance did you start planning your trip? I.e. how much time was there between you starting to plan and actually visiting?

# Visitor journey

## Planning

- Leisure visitors from Scotland were the most likely to start planning within a month of travel (25%).
- Visitors from the rest of the UK (44%) and overseas (33%) were the most likely to plan more than 6 months in advance.

## How far in advance did you plan your trip? – by market (Leisure only)



Base (All Leisure except rotational shift workers): Scotland 135; rest of UK 211; overseas 205

Q4: How far in advance did you start planning your trip? I.e. how much time was there between you starting to plan and actually visiting?

# Visitor journey

## Booking

- Patterns of data in terms of booking the trip are very similar to those for planning – the majority overall (82%) booked within 6 months.
- However, although 24% **planned** their trip more than 6 months before travel, only 13% **booked** this far in advance, suggesting that some held off booking for some months. This may have been necessary if travel operators timetables were not available at the point of planning.
- Again, differences were noted between the three visitor sub-groups, as noted over.

## How far in advance did you book your trip?

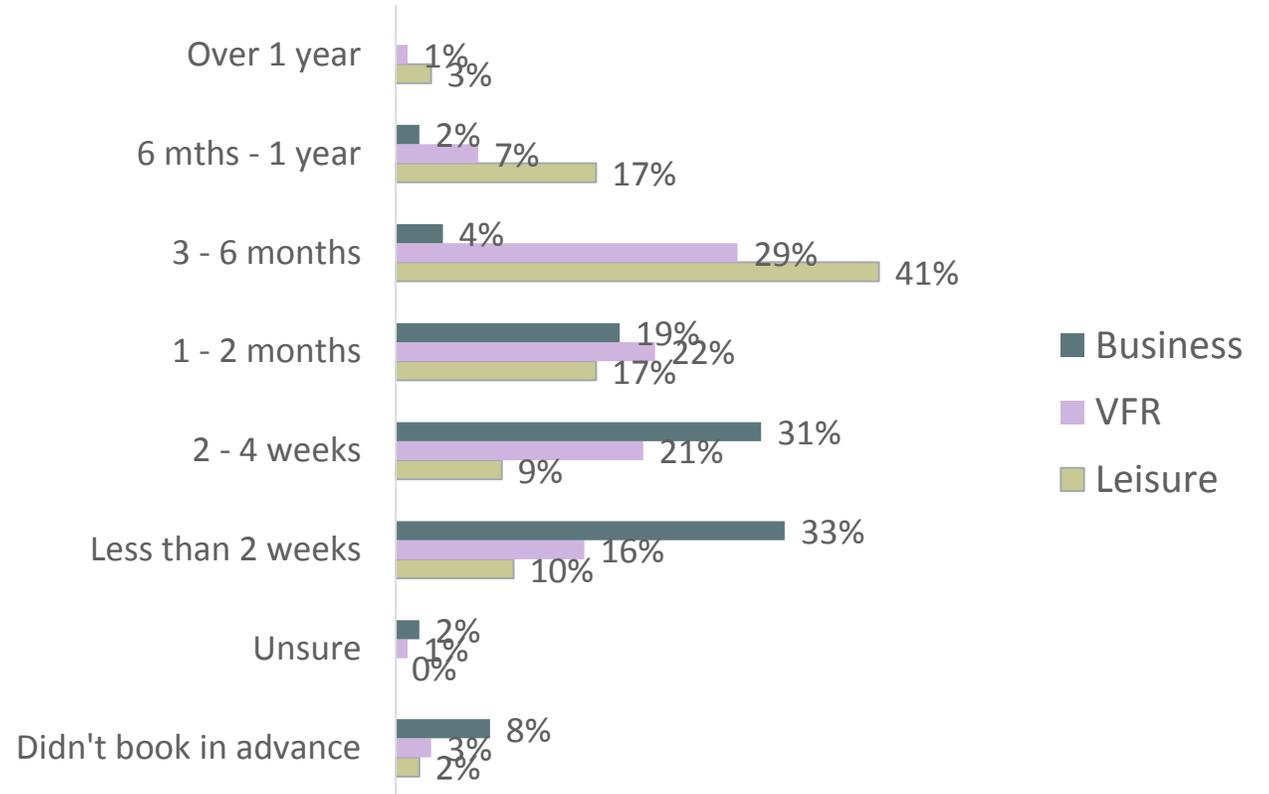


# Visitor journey

## Booking

- Mirroring the pattern of response for planning, Leisure visitors were the most likely to book their trip to Shetland some time in advance of travel – 61% booked more than 3 months before visiting.
  - Leisure visitors from Scotland were the most likely to book within a month of travel (32%). For other visitors, the typical timing of booking is 3 to 6 months before (rest of UK 41%; overseas 47%).
- Business and VFR visitors were more likely to book within one month of travel – 64% of Business visitors and 37% of VFR visitors.

## How far in advance did you book your trip? – by visitor type



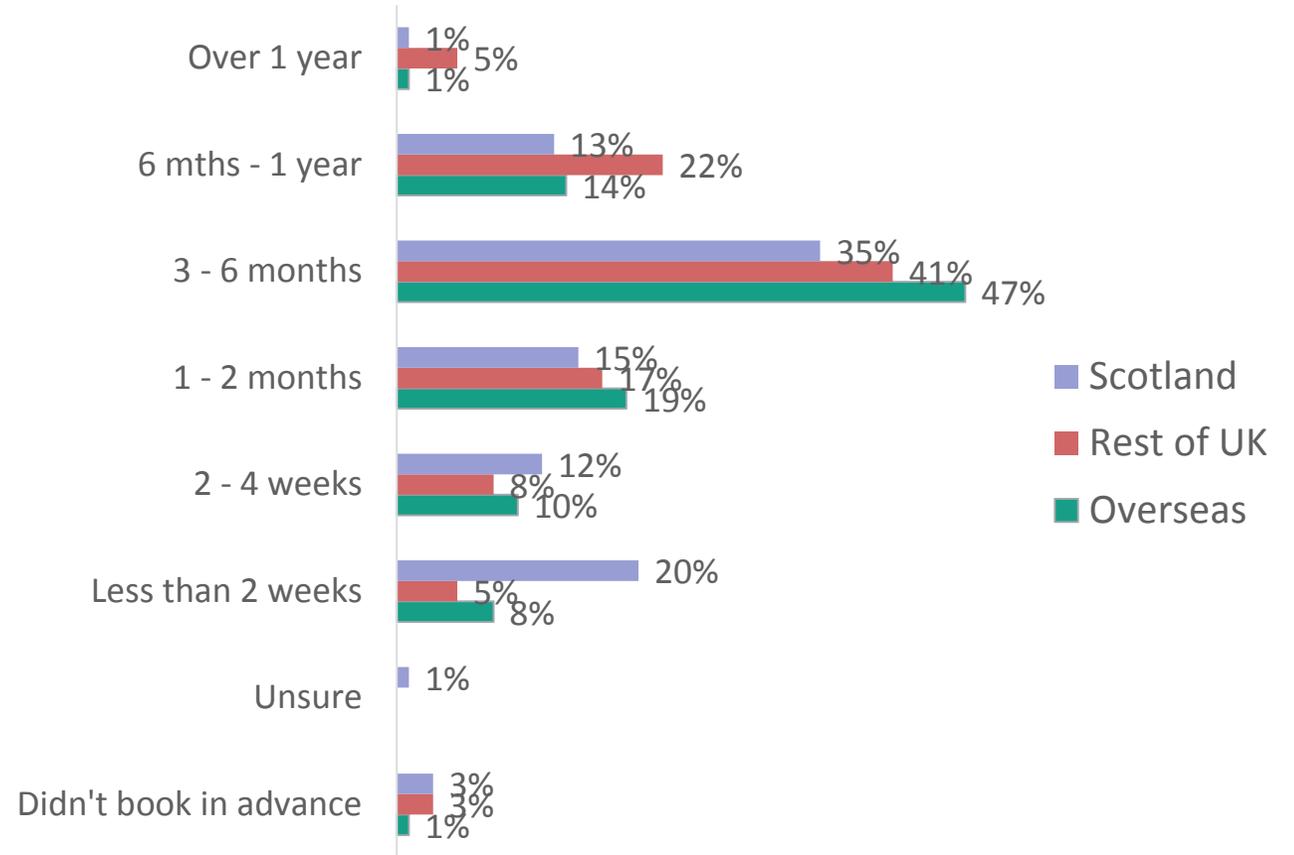
Base (All except rotational shift workers):  
Leisure 551; VFR 105; Business 169

# Visitor journey

## Booking

- Visitors from Scotland were the more likely to book within a month of travel (32%) than those from the rest of the UK (13%) or overseas (18%).
- For visitors from the rest of the UK and overseas the typical timing of booking is 3 to 6 months before the trip (rest of UK 41%; overseas 47%).

## How far in advance did you book your trip? – by market (Leisure only)



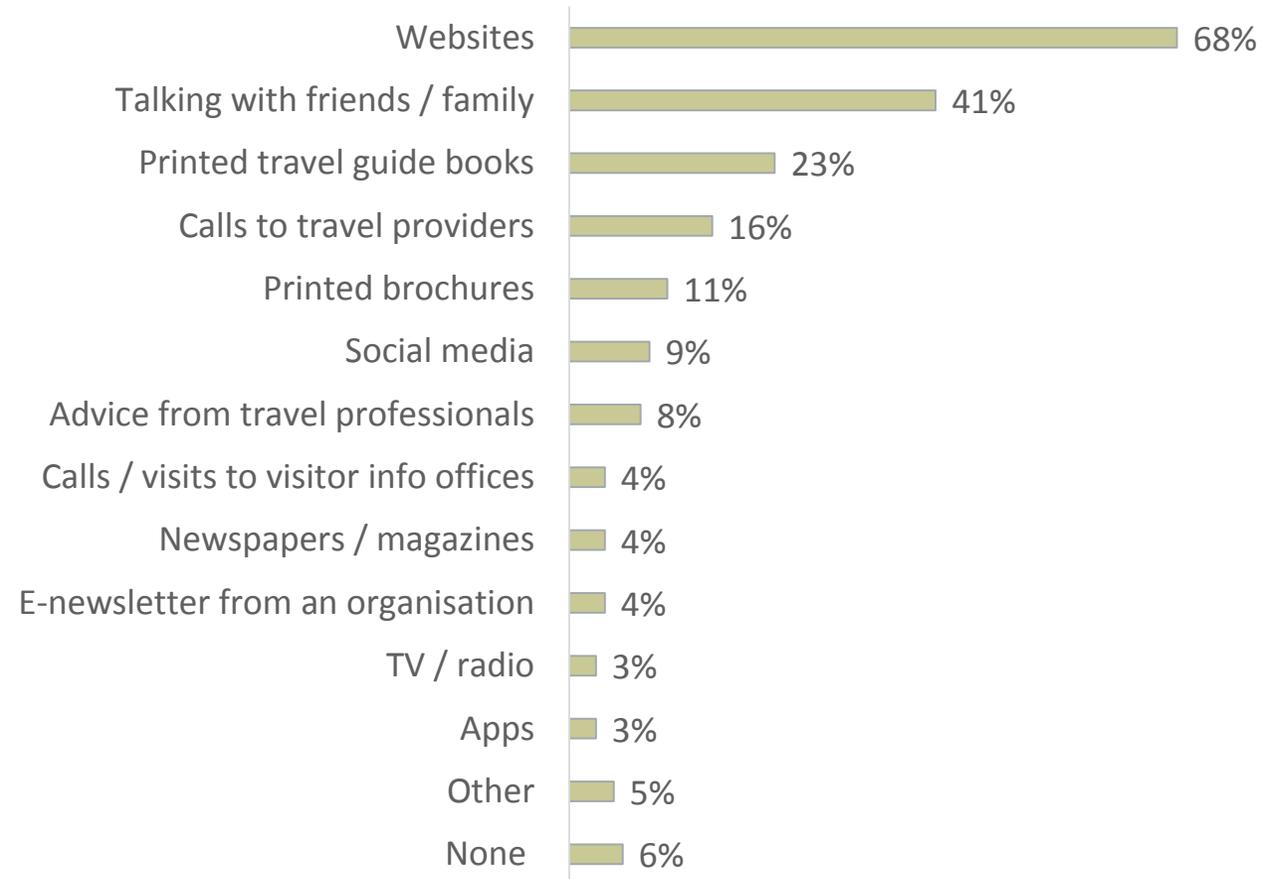
Base (All Leisure except rotational shift workers):  
Scotland 135; rest of UK 211; overseas 205

# Visitor journey

## Sources of information

- Websites were the key source of information for Leisure visitors when planning their trip. Word of mouth is also critical, with 41% citing family and friends.
- Printed materials were also often mentioned, including travel guide books (23%) and brochures (11%).
- Social media was mentioned by 9% of visitors, while 4% mentioned e-newsletters and 3% mentioned apps, including VisitScotland, Expedia, Tripadvisor, Booking.com, Google maps and Airbnb.
- Overseas visitors were more likely to use printed travel books (37%) than those from Scotland (10%) or the rest of the UK (19%).
- Overseas visitors (81%) and rest of UK visitors (67%) were more likely to use websites than visitors from Scotland (53%). Overseas visitors were least likely to talk to friends and family (27%; Rest of UK 45%; Scotland 54%).
- Over 65 year olds were more likely to call travel providers than those in younger age groups. Younger age groups were more likely to use social media and websites than older respondents.

## Sources of information during planning - Leisure visitors



Q6: Which of the following sources of information did you use when planning your visit to Shetland?

Base (All Leisure): 551

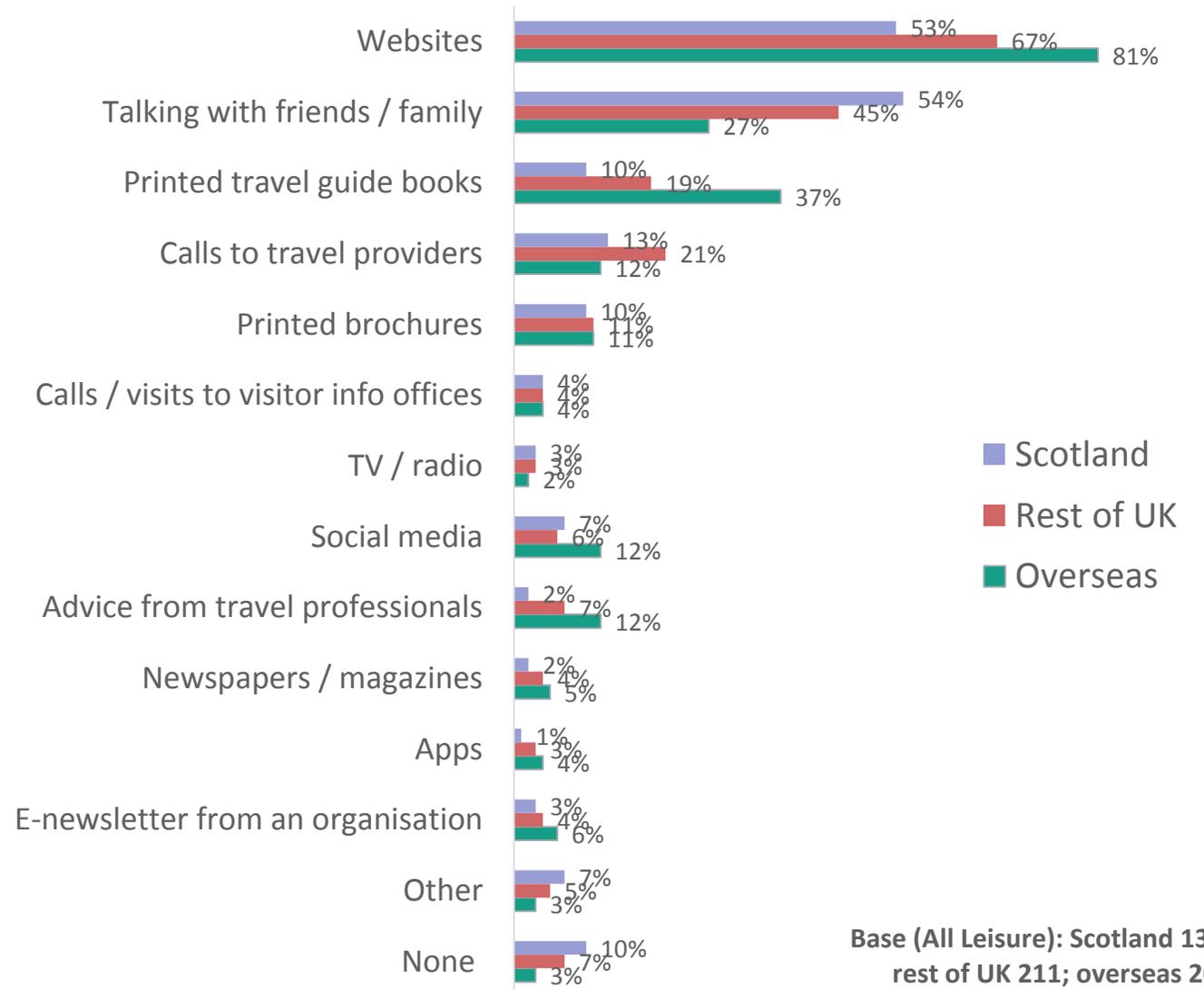
# Visitor journey

## Sources of information

- There were some interesting variations in sources of information used by Leisure visitors when the data was analysed by visitor origin.
- Overseas visitors (81%) were more likely to use websites than visitors from Scotland (53%) and those from the rest of the UK (67%).
- Overseas Leisure visitors were also more likely to use printed travel books (37%) than those from Scotland (10%) or the rest of the UK (19%).
- Visitors from Scotland (54%) and from the rest of the UK (45%) were the most likely to talk to friends and family than those from overseas (27%).



## Sources of information during planning - by market (Leisure only)



Base (All Leisure): Scotland 135; rest of UK 211; overseas 205

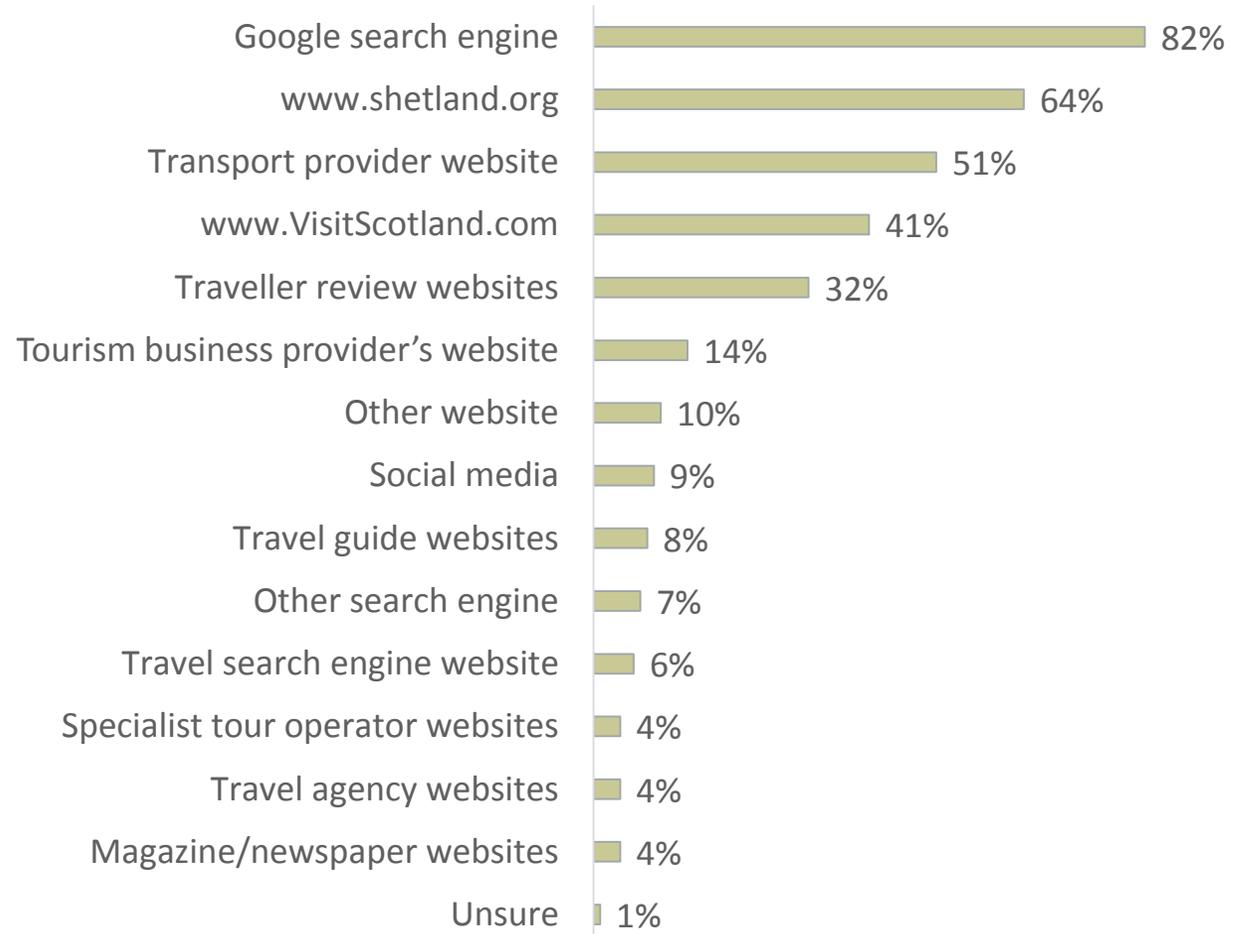
Q6: Which of the following sources of information did you use when planning your visit to Orkney?

# Visitor journey

## Sources of information

- Leisure visitors who had sought information online were asked which websites or search engines they had used. The majority of these visitors (82%) reported using the Google search engine as a starting point.
- The key tourism websites cited were [www.shetland.org](http://www.shetland.org) (64%) and [VisitScotland.com](http://VisitScotland.com) (41%).
- Almost half also reported using transport providers' websites, whilst a third looked at traveller review websites.
- [VisitScotland.com](http://VisitScotland.com) was more likely to be used by overseas visitors (57%) than Scotland (30%) or rest of UK visitors (28%).
- Traveller review websites were also more likely to be used by overseas visitors (44%) – especially North Americans (58%).

## Websites and search engines used - Leisure visitors



Q8: What types of websites or search engines did you use when planning your visit to Shetland? Please think only about information gathering during planning your trip rather than booking the trip.

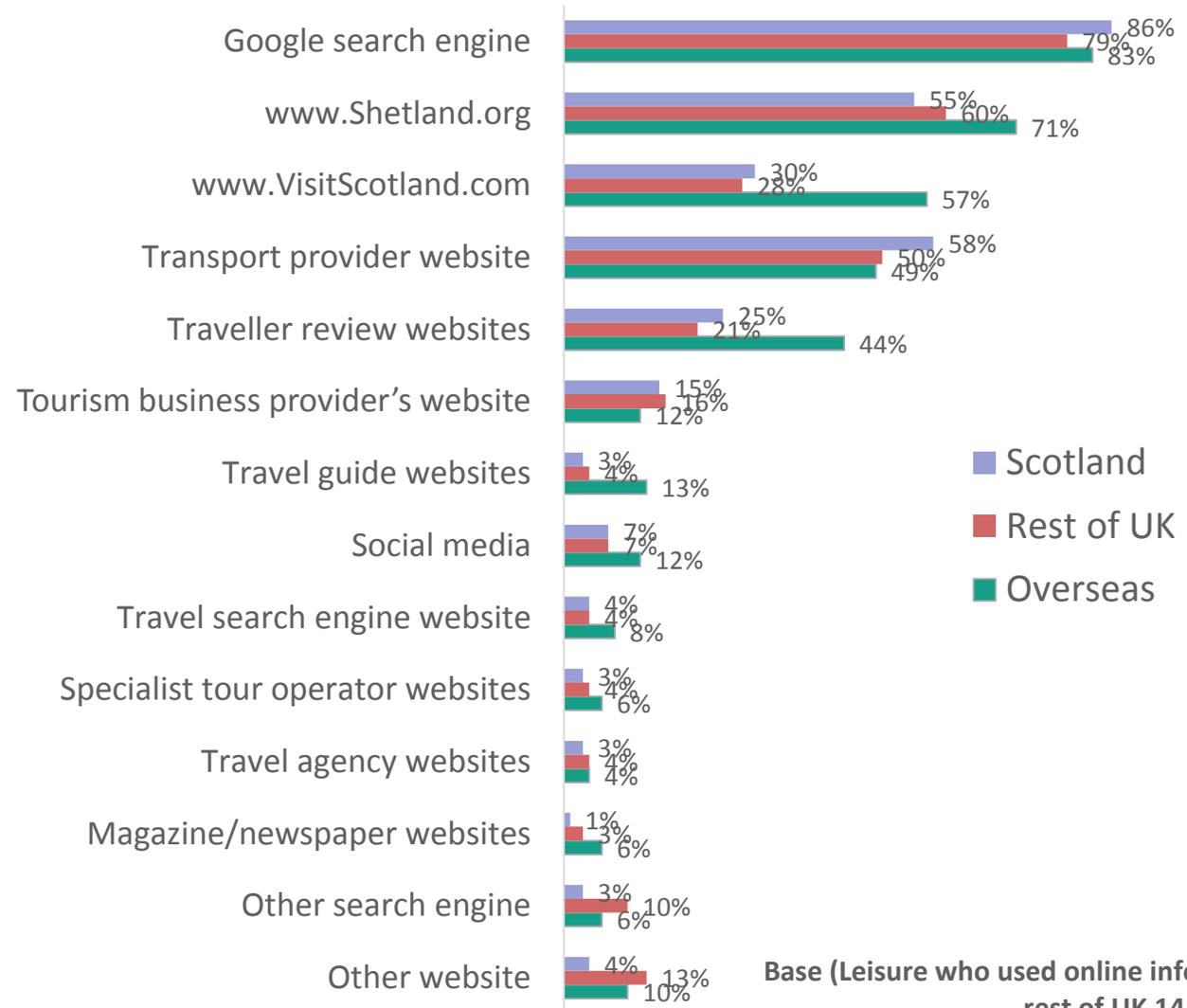
# Visitor journey

## Sources of information

- Overseas visitors tend to use a wider variety of websites than Scotland and rest of UK visitors.
- VisitScotland.com was more likely to be used by overseas visitors (57%) than Scotland (30%) or rest of UK visitors (28%).
- Shetland's own tourism website was also mentioned more by visitors from overseas (71%) than those from Scotland (55%).
- Traveller review websites were more likely to be used by overseas visitors (44%) – especially North Americans (58%).
- A higher proportion of overseas visitors also used travel guide websites (13%), compared to Scotland (3%) and rest of UK (4%) visitors.



## Websites and search engines used - by market (Leisure only)



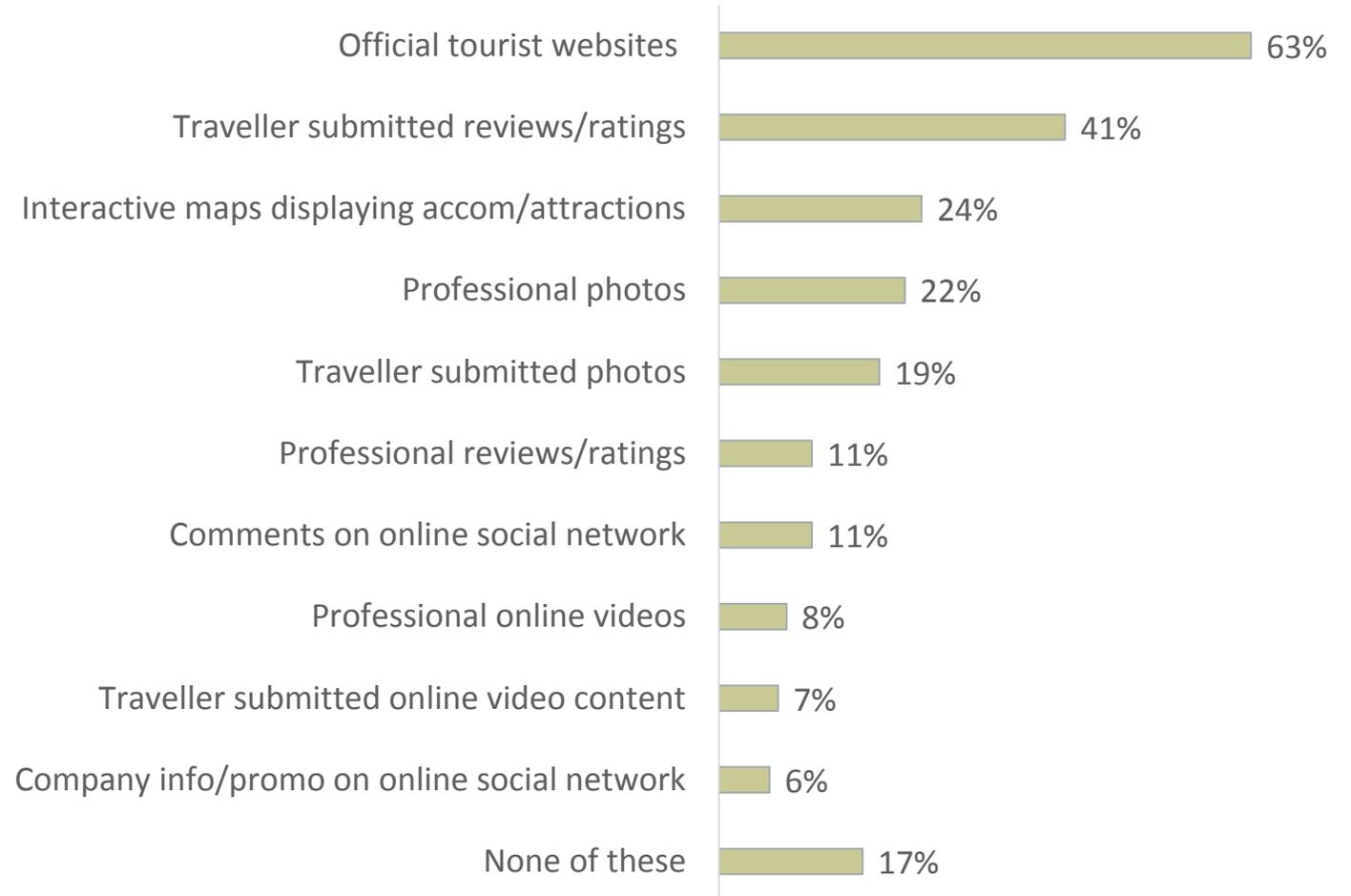
Q8: What types of websites or search engines did you use when planning your visit to Orkney? Please think only about information gathering during planning your trip rather than booking the trip.

# Visitor journey

## Sources of information

- Reflecting the high proportions visiting the Shetland.org and VisitScotland websites, many leisure visitors (who had viewed online info) reported that they had looked at official tourist websites (63%).
- The importance of traveller reviews was also confirmed, with 41% reporting that they looked at these during the planning process. Almost one fifth of these respondents also reported looking at traveller submitted photos online.
  - Visitors from North America (65%) and other overseas (58%) were especially likely to look at traveller reviews.
- Over one fifth of those who used online sources also reported looking at professional photos (22%) and/or interactive maps (24%).
  - A higher than average proportion of visitors from North America (49%) mentioned interactive maps.

## Online information used - Leisure visitors



Base (Leisure who used online info): 377

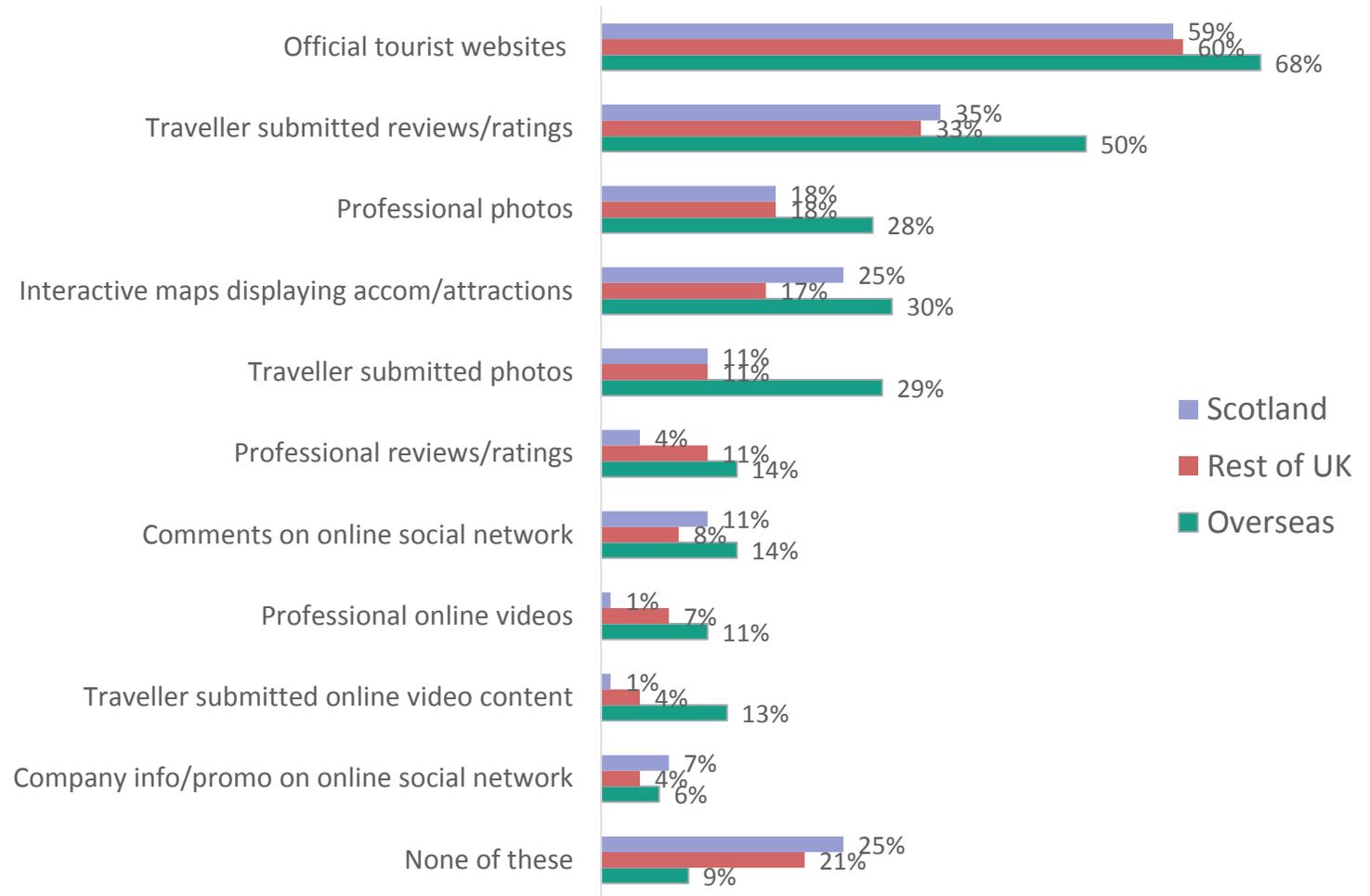
Q9: Which of the following types of online information did you use when planning your visit to Shetland?

# Visitor journey

## Sources of information

- Again, overseas visitors were more likely to use a wide range of online information than visitors from Scotland or the rest of the UK.
- For example, overseas visitors (50%) were more likely than those from the rest of the UK (33%) or Scotland (35%) to mention traveller submitted reviews as well as traveller submitted photos (29%; rest of UK 11%; Scotland 11%).
- Visitors from overseas were also more likely to mention using interactive maps (30%) than visitors from the rest of the UK (17%).

## Online information used - by market (Leisure only)



Base (Leisure who used online info): Scotland 71; rest of UK 141; overseas 165

Q9: Which of the following types of online information did you use when planning your visit to Orkney?

# Qualitative Findings

## Sources of information



Many qual respondents used online information to plan certain aspects of their trip as well as recommendations

*Used TripAdvisor and found it useful as I suppose it is a way of trying to get an honest opinion on things.*

*Because I've had family and friends up that way, they gave me a lot of information about what to do and where to go, which was really good.*

*I did everything online as far as travel, but didn't plan my excursions, I knew where I wanted to go and so anything else I came across was a bonus.*

*It [Shetland.org] was fairly handy, really easy to use. Gave information about events taking place on the Island, as well as giving links to other potentially useful websites.*

*All accommodation was booked through VisitScotland website.*

*I am a man travelling on my own and so as long as the cost and location are right then I am not particularly interested in Star Ratings.*

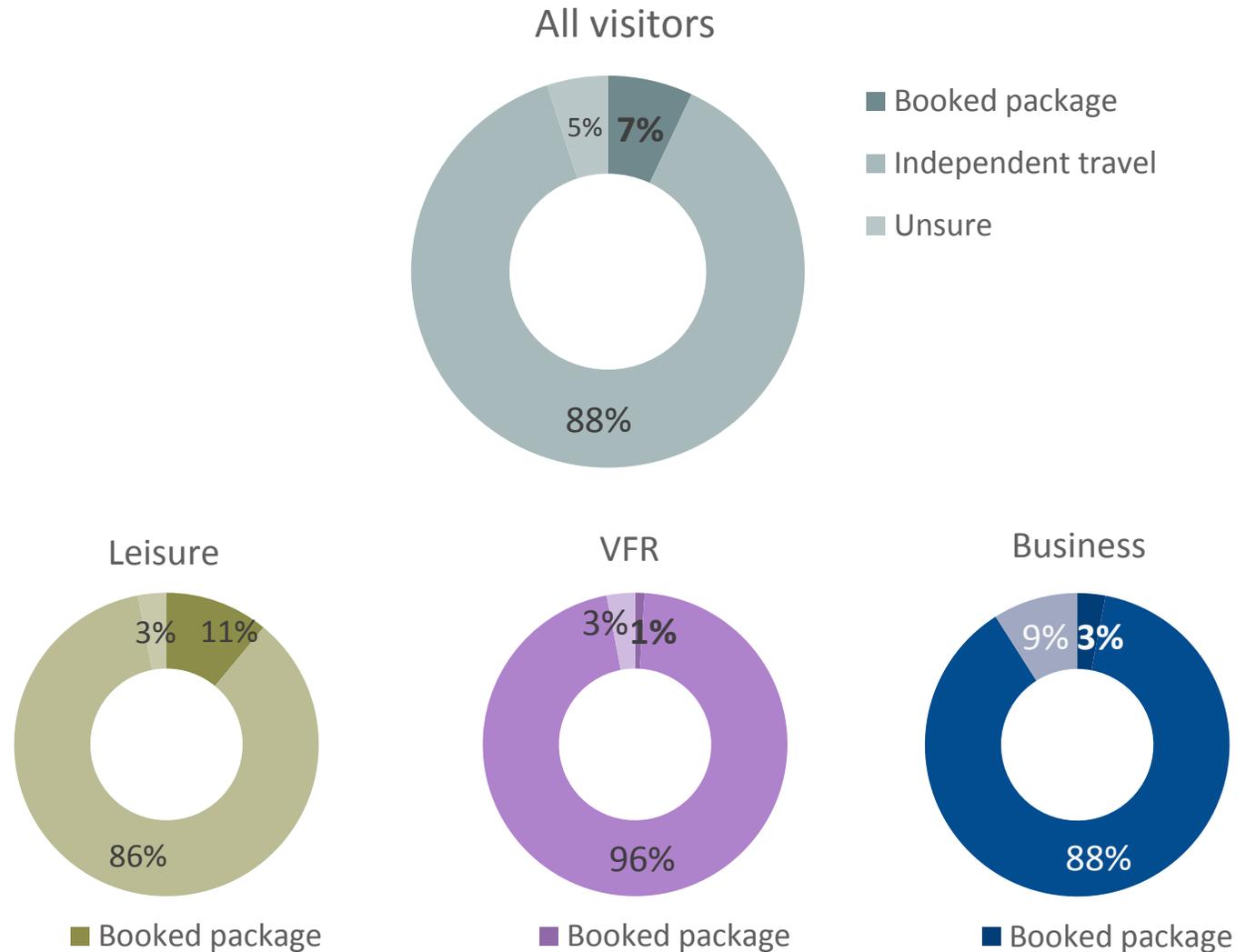
# Visitor journey

## Booking

- Very few visitors to Shetland in 2017 reported that they had booked their trip as a package – only 7% in total.
- Independent travel was prevalent across all visitor types. Proportions of package booking were particularly low for VFR (1%) and Business (3%) visitors, however, Leisure visitors were also predominantly independent travellers (86%).
- Leisure visitors from Scotland (4%) were less likely to book a package than those from the Rest of the UK (14%) or those from Overseas (12%).



### Did you book a package?



Base (All): 854

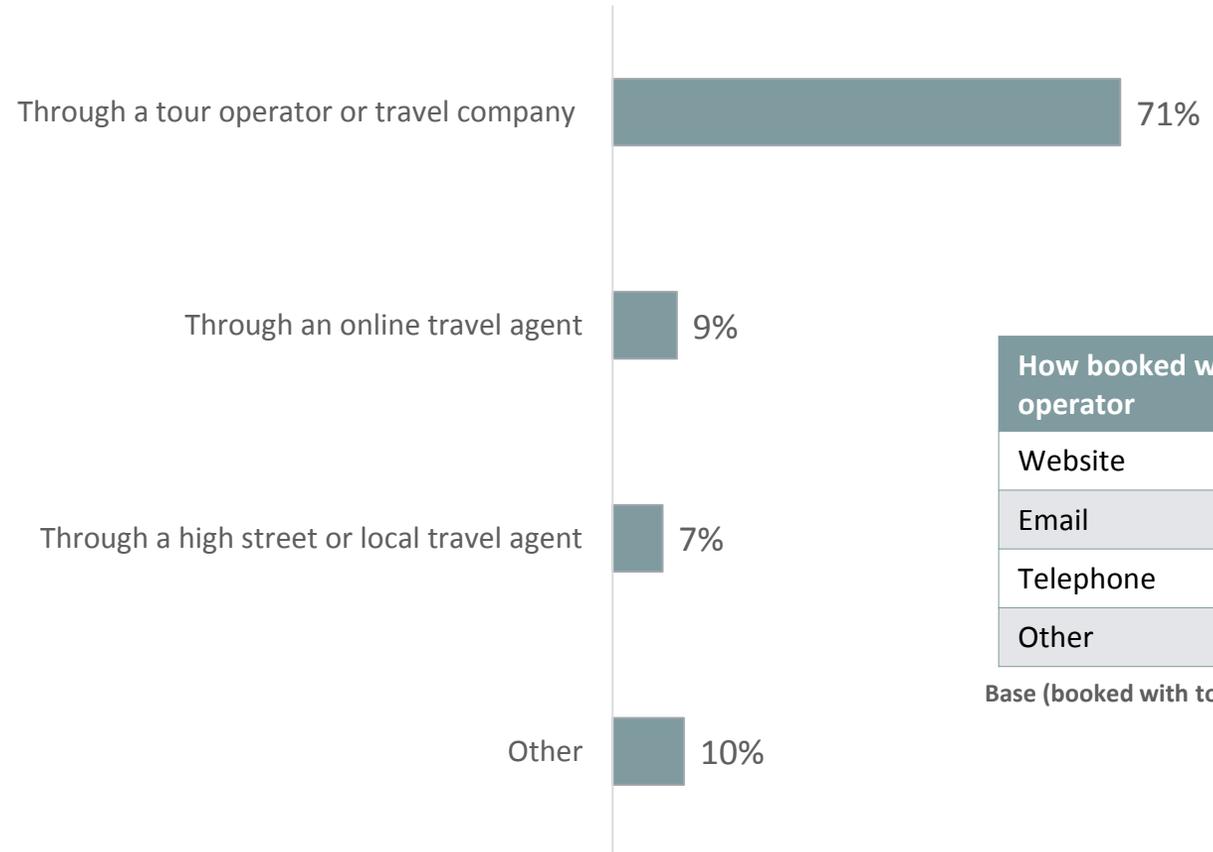
Q27: Did you book your trip to Shetland as a package?

# Visitor journey

## Booking

- Only 7% of visitors reported booking their trip as a package.
- Of these, the majority (71%) booked this through a tour operator or travel company.
- Most commonly the booking was made via the tour operator's website.

## Method of booking package



How booked with tour operator	
Website	39%
Email	23%
Telephone	31%
Other	7%

Base (booked with tour operator): 49

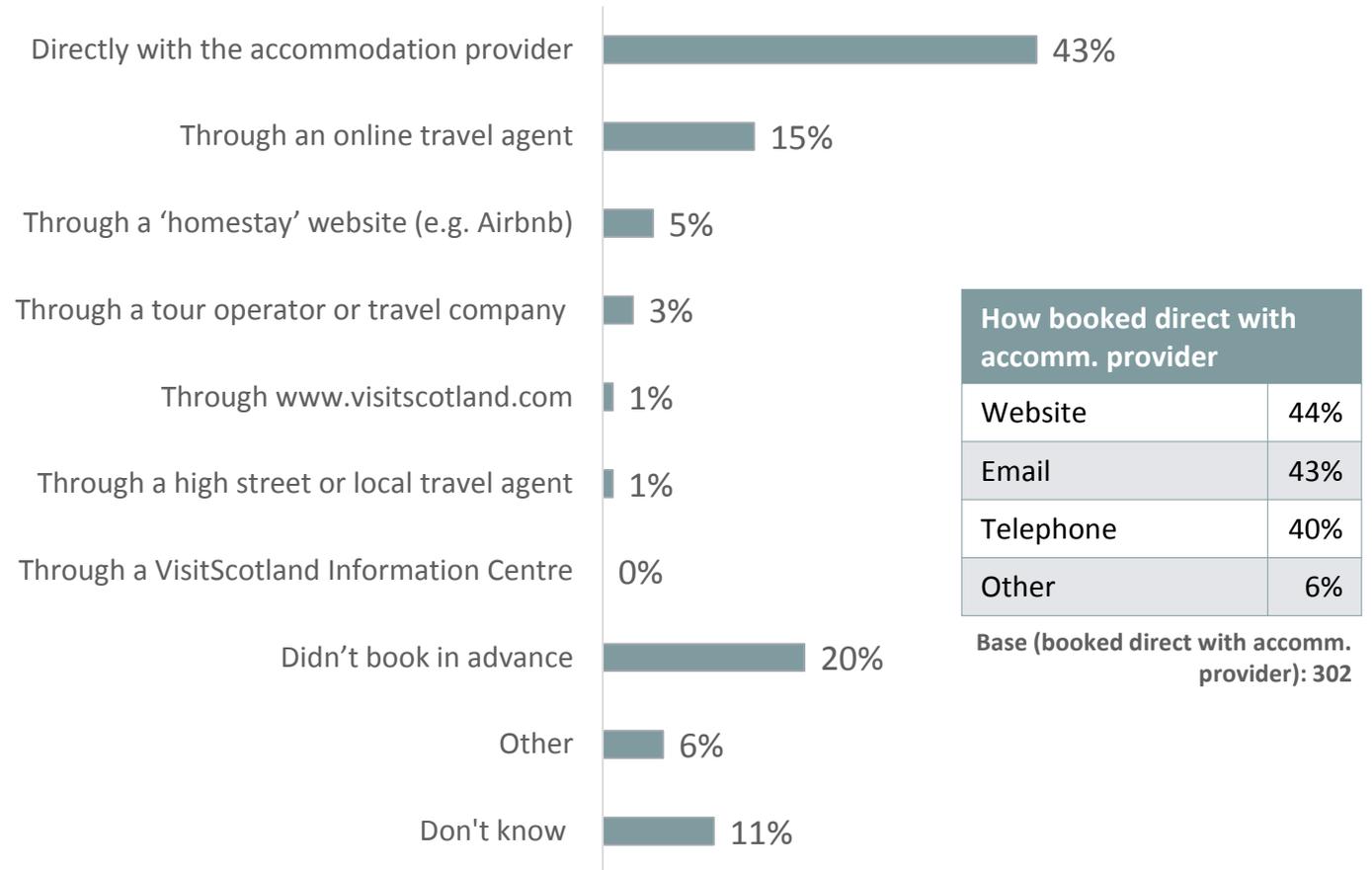
Base (all who booked a package trip): 68

# Visitor journey

## Booking

- For visitors who did not book a package, the most common way of booking accommodation was directly with the accommodation provider (43%).
- Such bookings tend to be made online on the accommodation provider's website (44%) and by email (43%). A significant proportion were also made by telephone (40%).
- Online travel agents were also mentioned by 15% of overnight visitors, while 5% reported using a 'homestay' website such as Airbnb.
- It is also interesting to note that 20% of visitors did not book their accommodation in advance. These respondents were more likely to be VFR visitors (59%) than Leisure (15%) or Business visitors (10%).
- Full data pertaining to methods of booking accommodation for Leisure visitors is detailed over.

## Method of booking accommodation



Base (All who stayed in paid accommodation, excluding those who booked accomm. in a package trip): 681

Q29: How did you book your accommodation (e.g. hotel, self-catering, camping, etc.) for your recent trip to Shetland?

# Visitor journey

## Booking

- Half of Leisure visitors who were staying in paid accommodation reported booking their accommodation directly with the provider, while around one fifth booked via an online travel agent.
- ‘Homestay’ websites were mentioned by 8% of Leisure visitors who stayed in paid accommodation. These were more likely to be mentioned by under 35 year olds (16%) than the older age groups.
- Scotland (10%) and rest of UK Leisure visitors (12%) were less likely to book through an online travel agent than overseas visitors (30%). Scotland (4%) and rest of UK (5%) were also less likely to book through a ‘homestay’ website than overseas visitors (14%).

## Method of booking accommodation - Leisure visitors



How booked direct with accomm. provider	
Website	52%
Email	49%
Telephone	41%
Other	4%

Base (Leisure booked direct with accomm. provider): 235

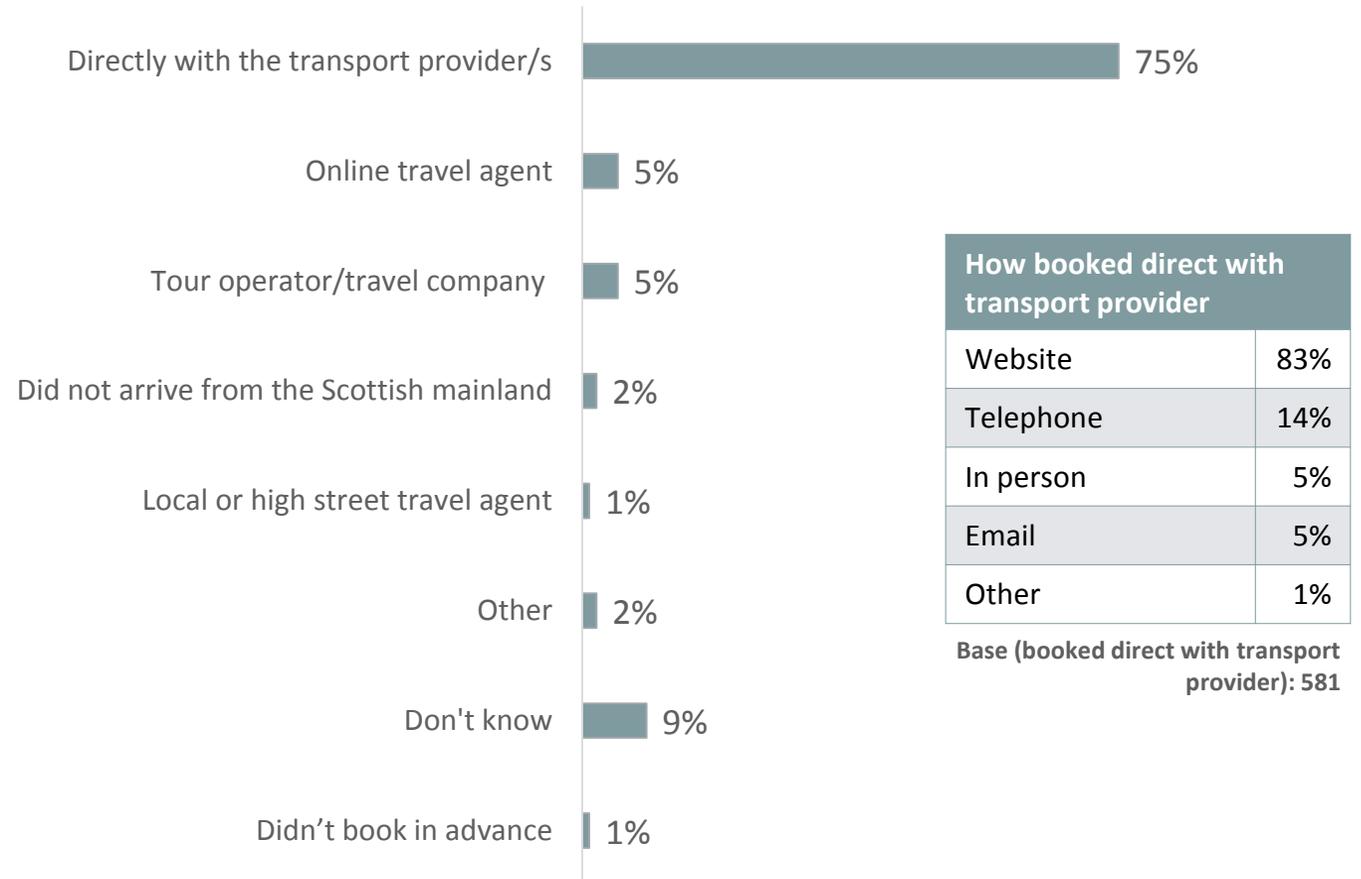
Base (Leisure staying in paid accommodation, excluding those who booked accomm. in a package trip): 466

# Visitor journey

## Booking

- For the vast majority of visitors who did not book a package (75%), their transport to Shetland was booked directly with the transport provider.
- Just over four out of five bookings with transport providers were done via the website, with only 14% by telephone and 5% in person.

## Method of booking transport



# Visitor journey

## Summary



- The key reasons given for visiting Shetland for Leisure visitors were the scenery, the history/culture and the fact they had always wanted to visit.
- Around half of Leisure visitors also reported that something they had seen or read had also helped inspire their visit – for 28% this was a TV programme.
- Online sources are key information sources for Leisure visitors during the planning and booking process. Visitors tend to use a combination of websites and search engines, most commonly Google, Shetland.org, VisitScotland and transport providers.
- Many also reported reading traveller reviews on websites such as TripAdvisor to inform planning and booking.
- The majority book their transport and accommodation independently directly with providers, rather than booking packages or using agents.
- Although 'homestay' accommodation accounts for a small proportion of all accommodation bookings, almost one fifth (16%) of Leisure under 35 year olds booked their accommodation in this way.



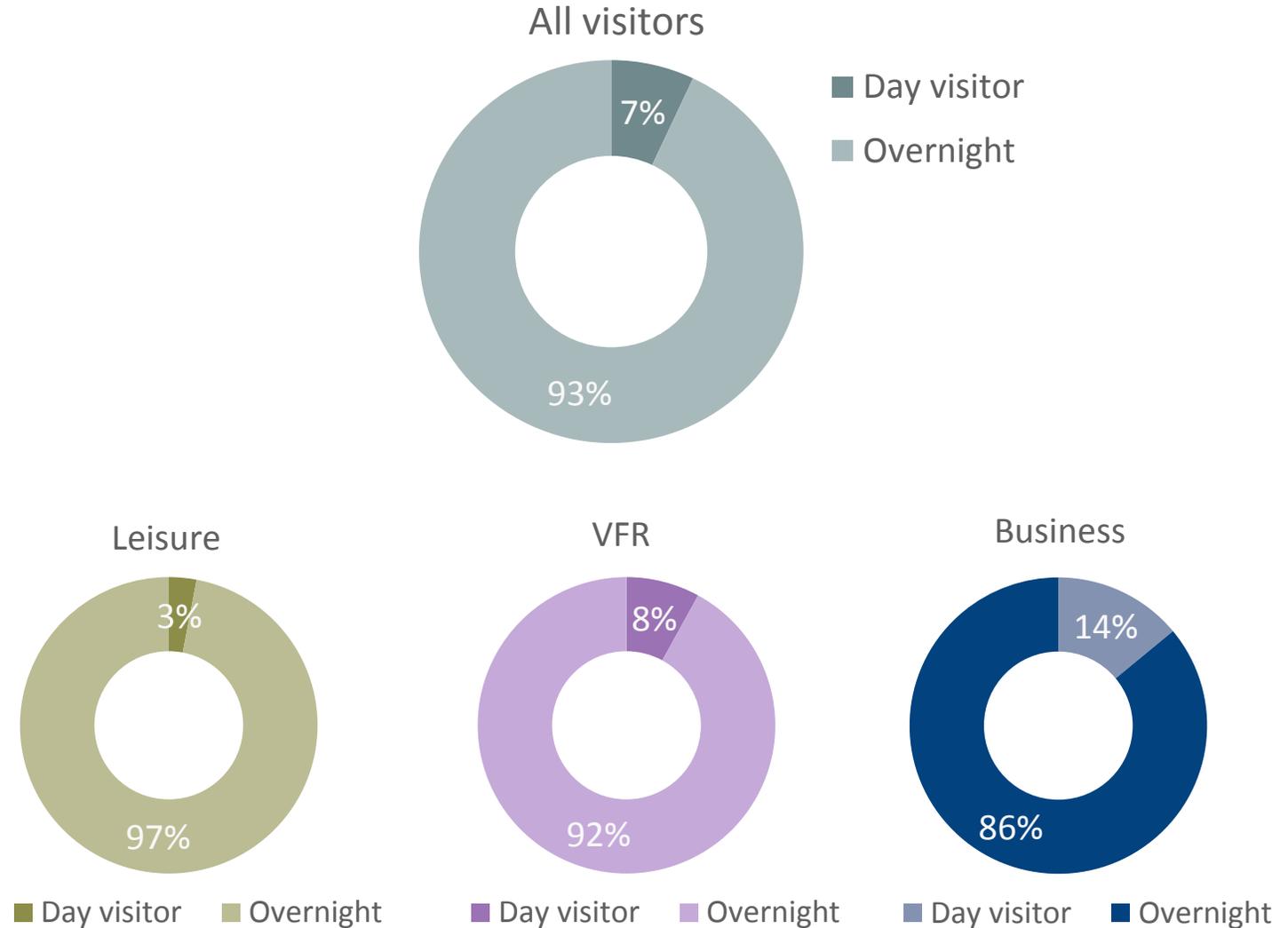
# Trip profile

# Trip Profile

## Day vs overnight

- As expected, the majority of visitors to Shetland were overnight visitors (93%).
- Amongst Business visitors some 14% were day visitors.

### Day visitor or staying overnight



CQ3: Which of the following best describes your current visit to Shetland?

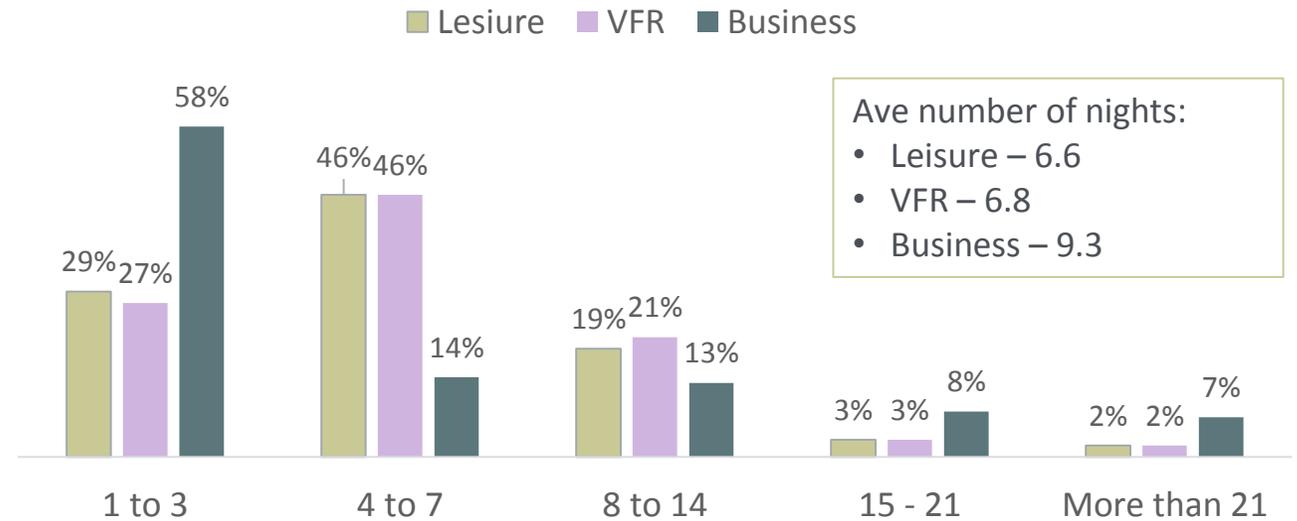
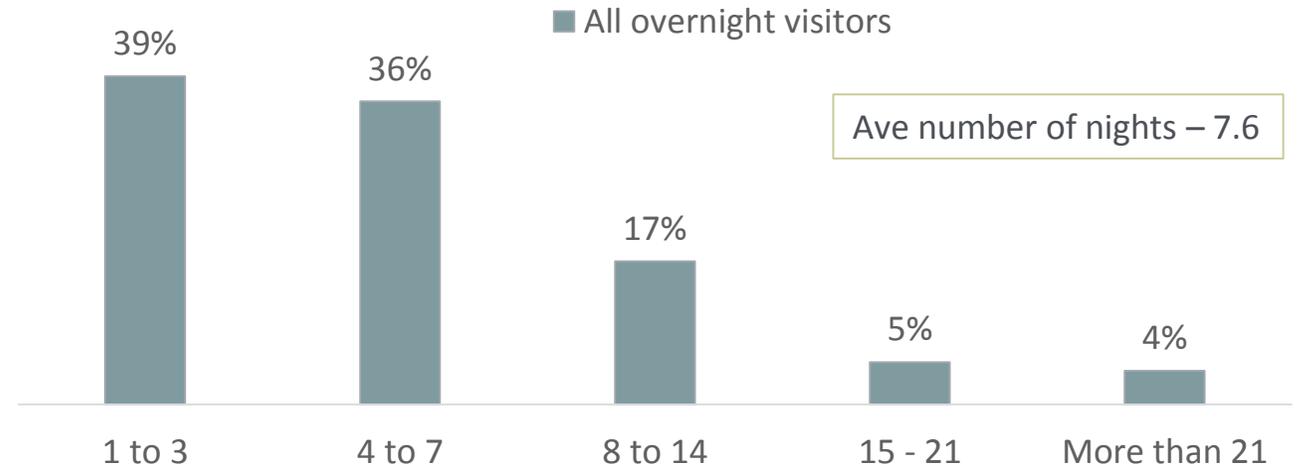
Base (All calibration visitors): 2,434

# Trip profile

## Number of nights

- The majority of overnight visitors to Shetland (75%) stayed for a period of one week or less.
- Leisure visitors staying for a week or less were more likely to stay 4 to 7 nights (46%) than 1 to 3 nights (29%). The average number of nights was 6.6 nights.
  - Leisure visitors from the rest of the UK tended to stay longer on Shetland (30% more than 7 nights) than those from Scotland (20%) or overseas (23%).
- VFR visitors tended to stay slightly longer, with a skew to 4 to 7 nights (46%) or longer (26%). The average number of nights was 6.8.
- Business visitors predominantly stay for 3 nights or less (58%). There was a proportion, who stayed for a longer period of time for work, with some 15% staying for over 2 weeks. The average number of business nights was 9.3.

## Number of nights - Shetland



Base (All overnight calibration visitors): Total 2207, Leisure 1,279; VFR 220; Business 671

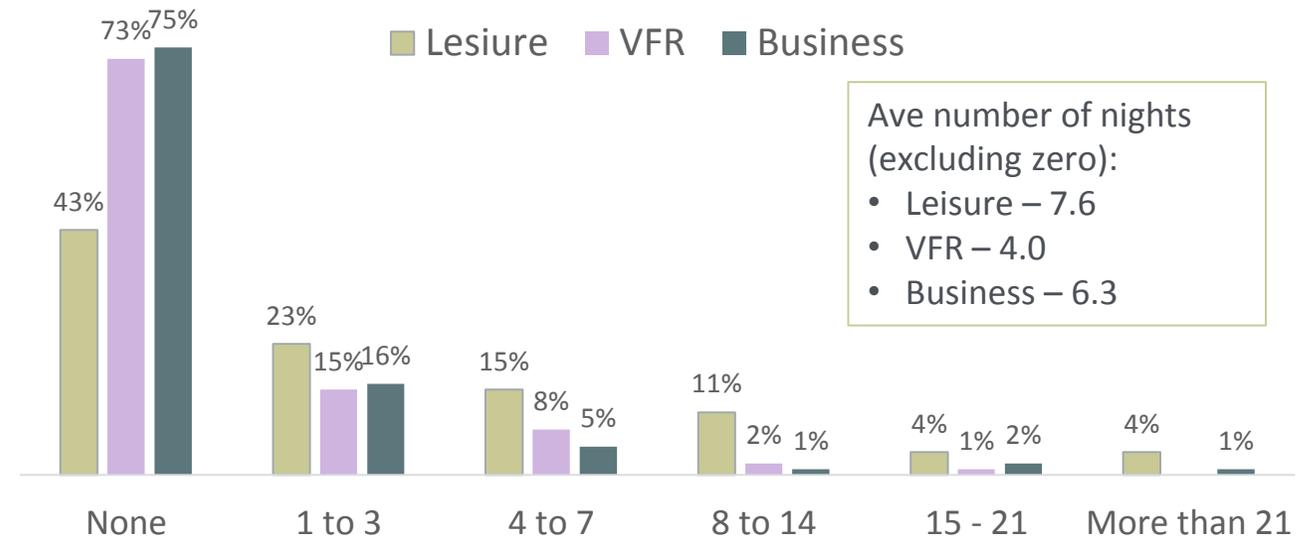
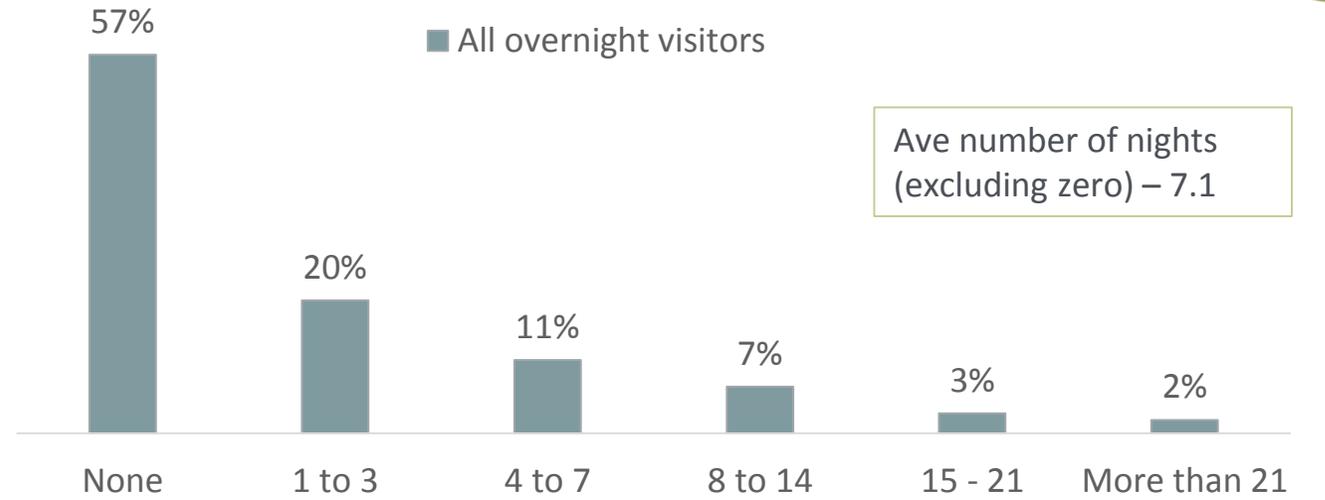
# Trip profile

## Number of nights

- 43% of overnight visitors reported that they also spent at least one night on the Scottish mainland during their trip.
- As we would expect, the proportion spending nights in other parts of Scotland was far higher for Leisure visitors (57%) than VFR (27%) or Business (25%) visitors.
- Of those who did spend some time in other parts of Scotland, the average number of additional nights was 7.6 nights for Leisure visitors, 4 for VFR and 6.3 for Business visitors.



## Number of nights – Scottish mainland



Base (All overnight visitors): Total 802, Leisure 535; VFR 96; Business 171

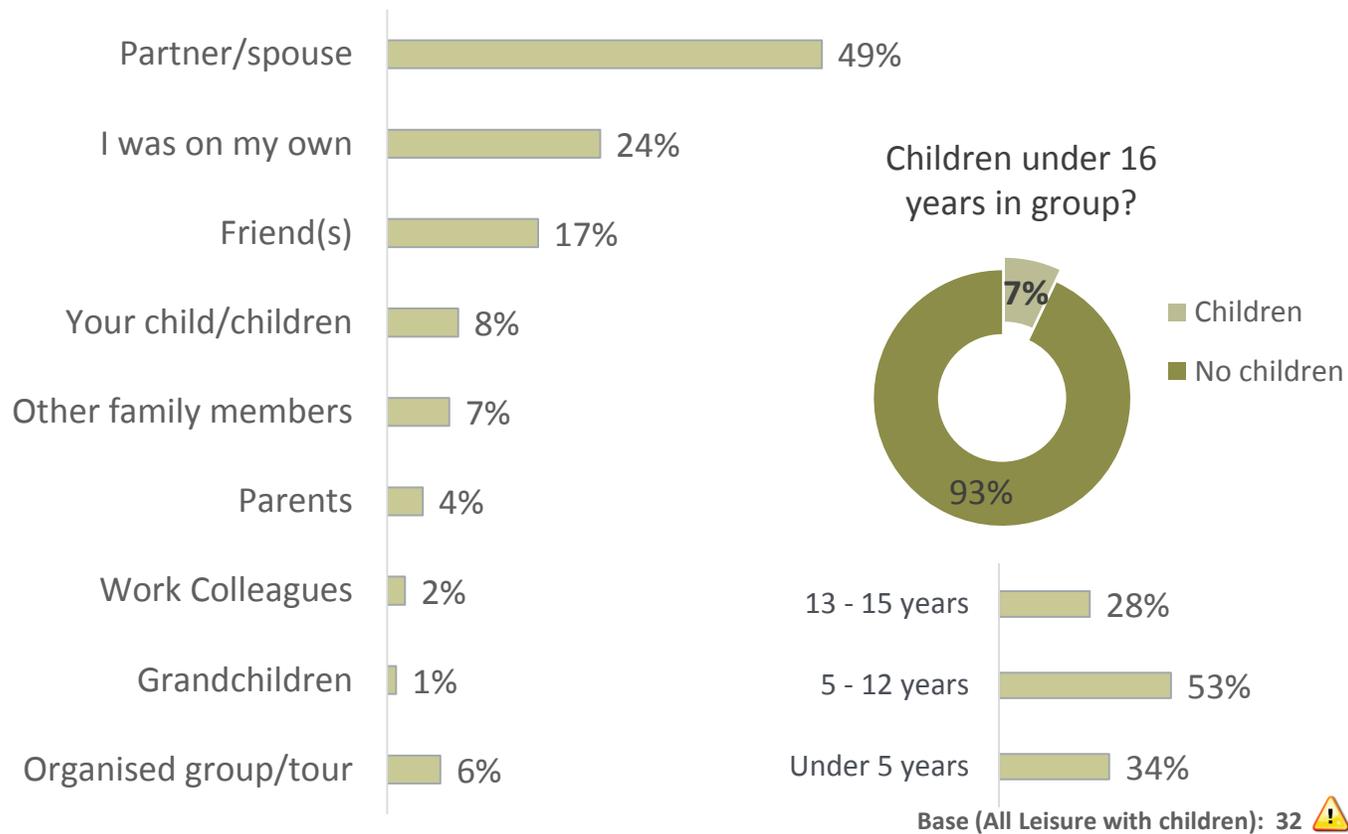
Q12: You previously indicated that you were on an overnight visit to Shetland. On your trip, how many nights did you spend away from home in the following locations? - Scotland

# Trip profile

## Party composition

- The majority of Leisure visitors to Shetland (49%) were travelling with their partner or spouse, with 38% reporting no other people travelling with them (i.e. they were travelling as a couple).
- A fifth of leisure visitors reported that they were travelling with other family members, including children, parents, grandparents and others. Only 7% had children under 16 years old in their group.
- A significant proportion of Leisure visitors (24%) reported that they were travelling alone.
- Leisure visitors from Scotland (13%) were more likely to have children in their group than those from the rest of the UK (5%) or overseas (5%).
- Under 35 year olds were more likely than average to be travelling on their own (36%). Those most likely to be travelling with their children were aged 35 to 44 years (22%).

## Party composition – Leisure visitors



Base (All leisure): 551

Q11: Which of the following best describes who was with you on your trip?

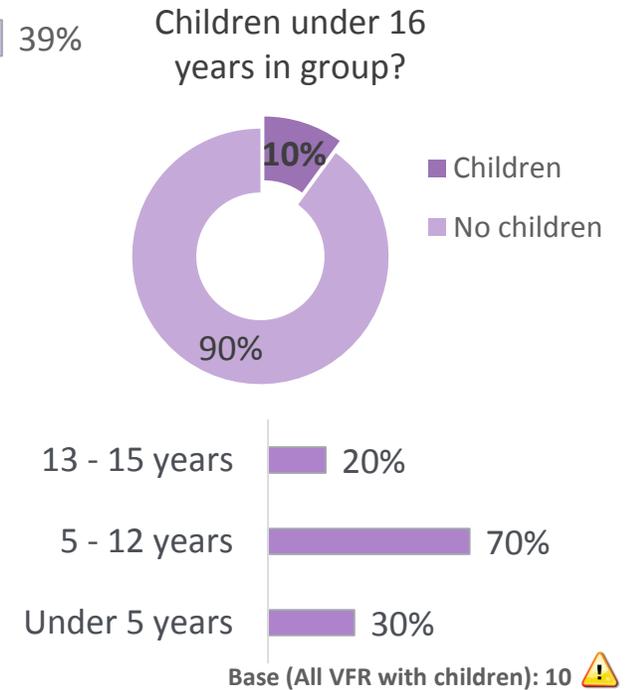
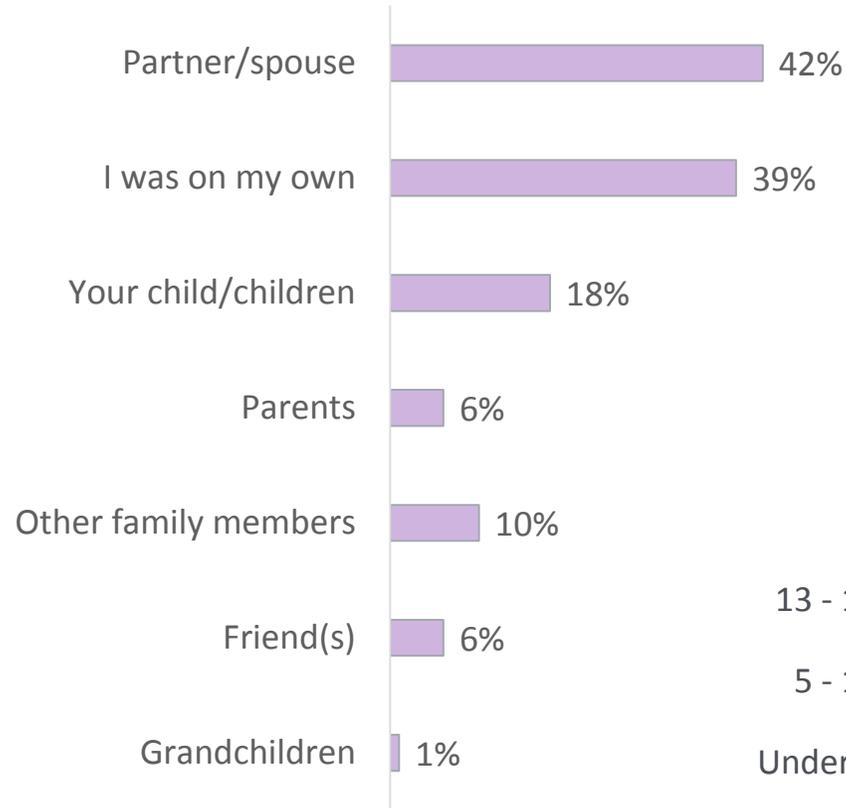
# Trip profile

## Party composition

- Amongst those travelling to Shetland to visit friends and relatives, a far higher proportion were travelling alone (39%) compared to Leisure visitors (24%).
- In total, 42% reported that they were visiting with their partner/spouse, with 29% reporting no other people in their group (i.e. they were travelling as a couple).
- A third (33%) were visiting with family members, with 10% reporting having children under 16 years old in their group.



## Party composition - Visiting friends and relatives



Base (All VFR): 105

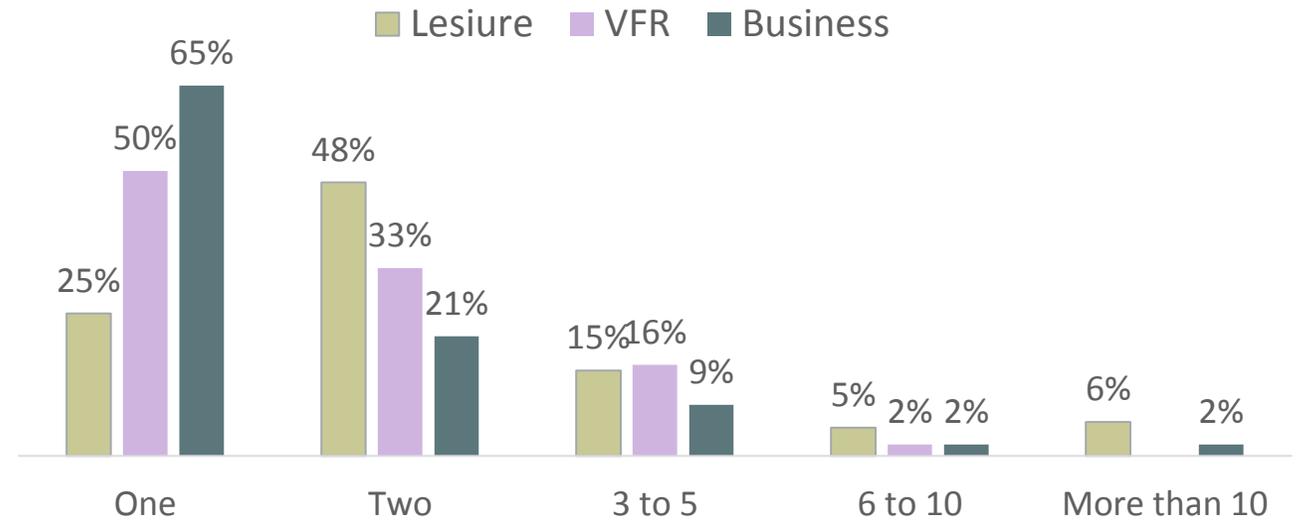
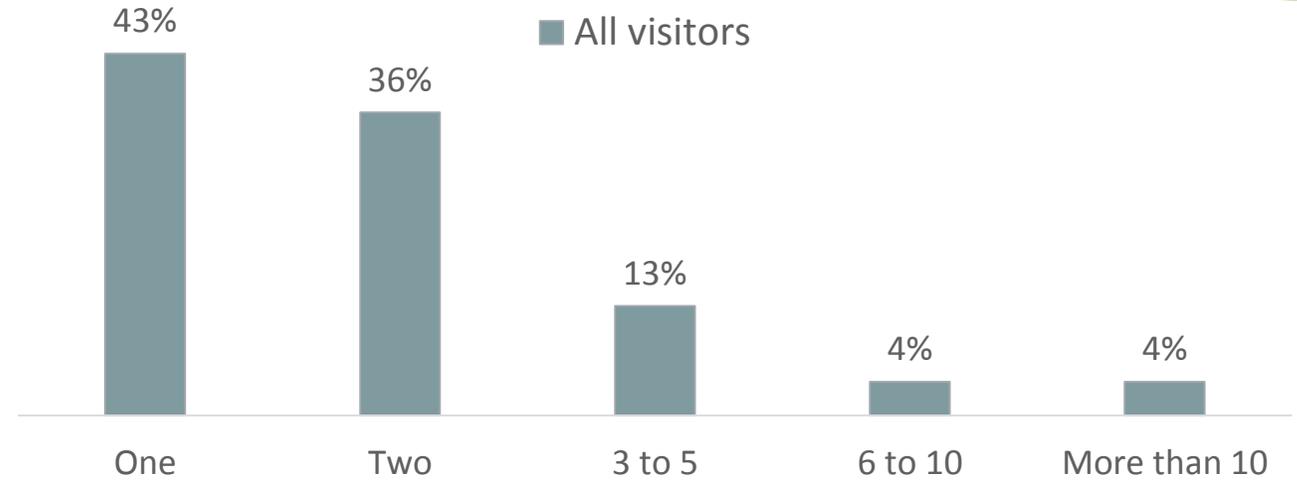
Q11: Which of the following best describes who was with you on your trip?

# Trip profile

## Party composition

- The majority of all visitors to Shetland reported that they were either visiting alone or with one other person.
- However, party size varies considerably by type of visitor. The majority of Business visitors (65%) were visiting alone, while Leisure visitors tend to visit with one other person, although a quarter were visiting alone. VFR visitors were evenly split between visiting alone (50%), and visiting with others.

### Number of people in party



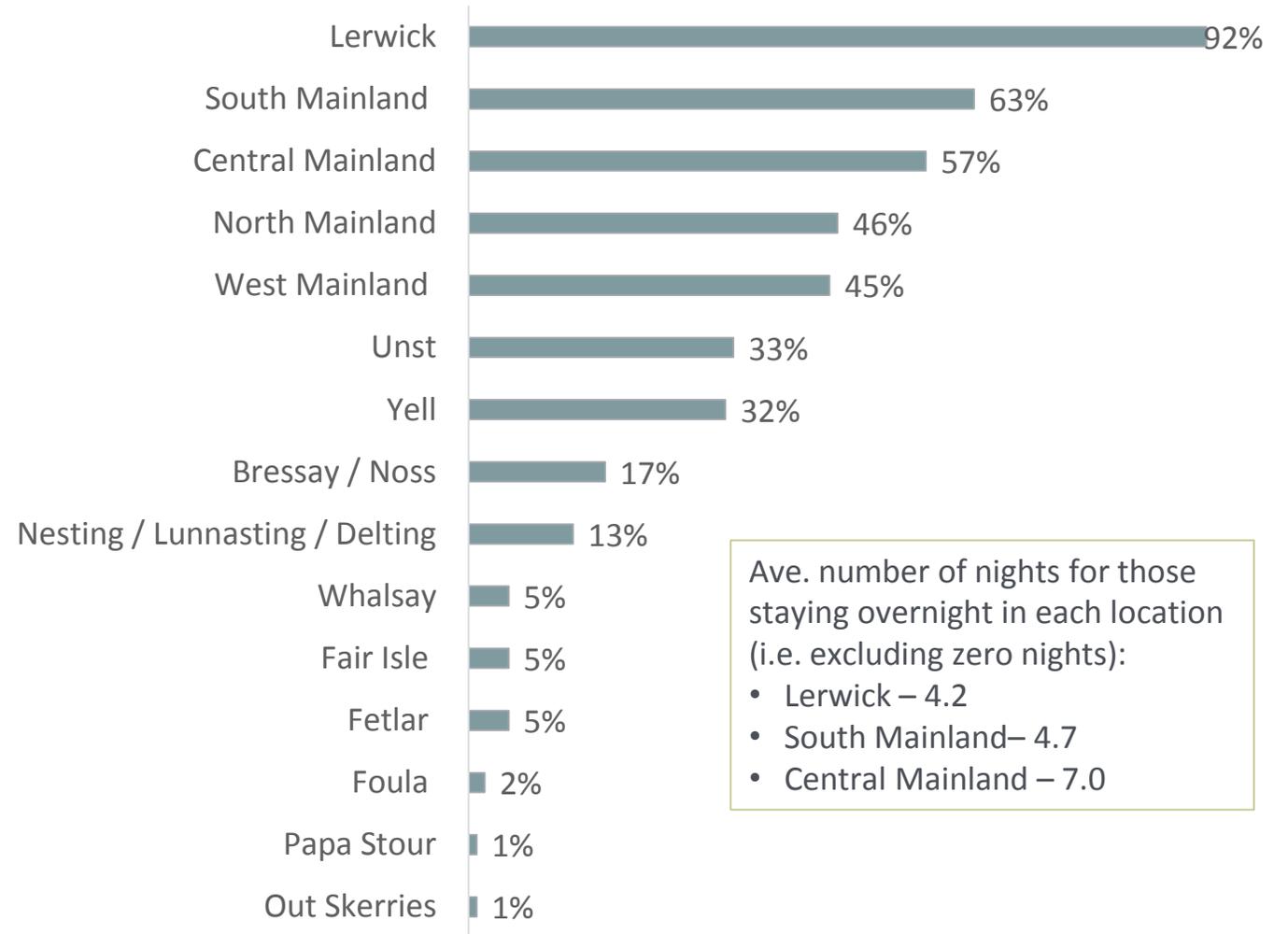
Base (All calibration visitors): Total 2434, Leisure 1329; VFR 243; Business 796

# Trip profile

## Areas visited

- Almost all visitors to Shetland reported that they visited Lerwick during their trip, and the majority also mentioned visiting South Mainland. Around half of all visitors also mentioned visiting Central Mainland, North Mainland and Westland; while around a third mentioned visiting Unst and Yell.
- There were variations in the areas of Shetland visited depending on visitor type. Generally, Leisure visitors tended to visit a wider variety of locations than Business or VFR visitors. Details of areas visited by each visit type are shown over.

## Areas of Shetland visited - All visitors



Ave. number of nights for those staying overnight in each location (i.e. excluding zero nights):

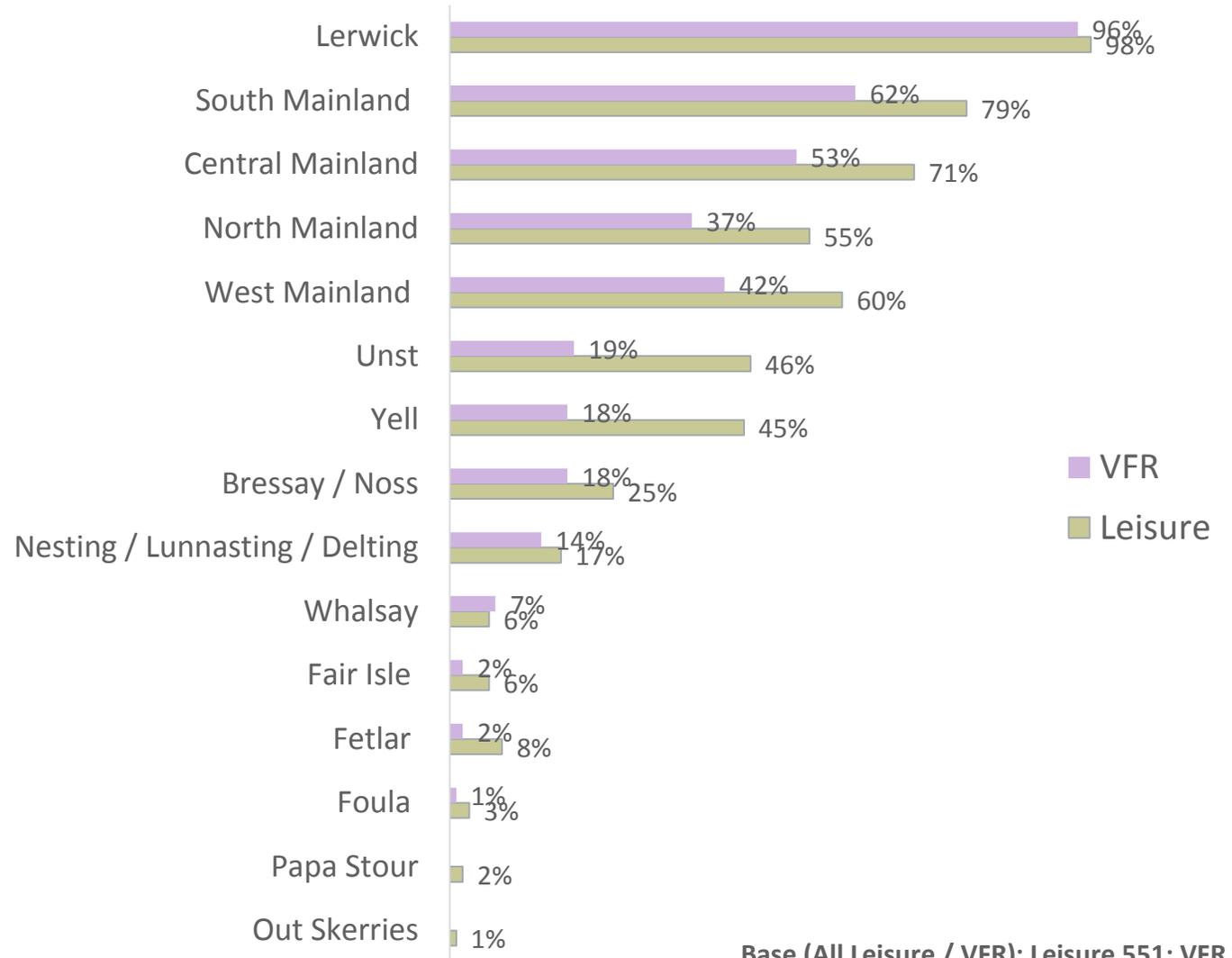
- Lerwick – 4.2
- South Mainland – 4.7
- Central Mainland – 7.0

# Trip profile

## Areas visited

- Both Leisure and VFR visitors predominantly visited the Mainland locations, including Lerwick.
- However the proportions of visitors visiting each location was generally higher for Leisure visitors than VFR visitors – and particularly so for Yell and Unst. This is to be expected as Leisure visitors are more likely to tour around Shetland to take in many sites and attractions than VFR visitors, whose main purpose is to visit friends and family living on the islands.

## Areas of Shetland visited - Leisure and VFR visitors



Base (All Leisure / VFR): Leisure 551; VFR 105

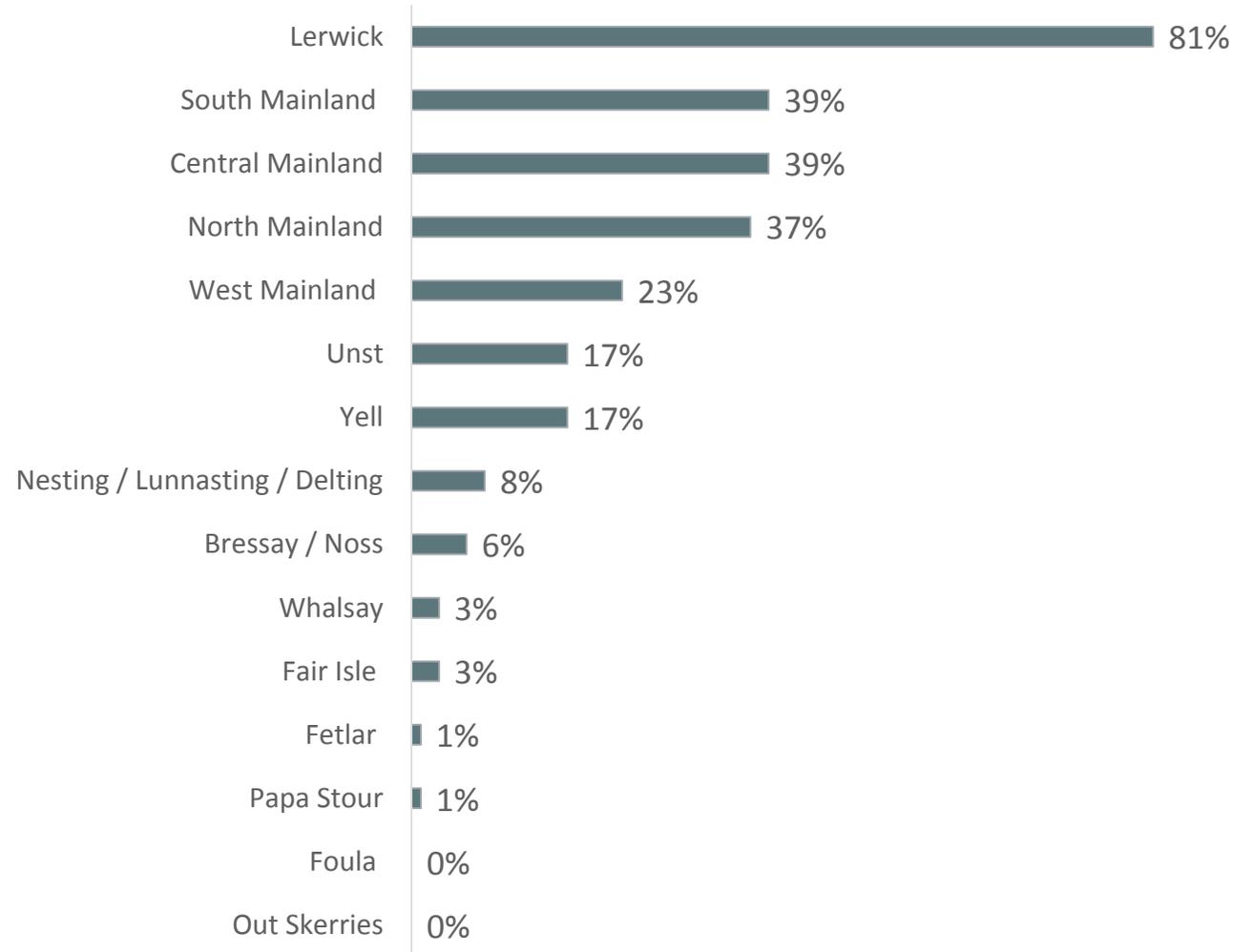
Q13a: Which of the following areas of Shetland did you visit during your trip?

# Trip profile

## Areas visited

- As we would expect, Business visitors tend to focus on one or two locations, rather than visiting multiple locations across Shetland.
- Four fifths of Business visitors reported visiting Lerwick, while around two-fifths also visited South Mainland, Central Mainland and/or North Mainland; and a quarter visited West Mainland. Around 17% visited Unst and/or Yell.

## Areas of Shetland visited - Business visitors



Q13a: Which of the following areas of Shetland did you visit during your trip?

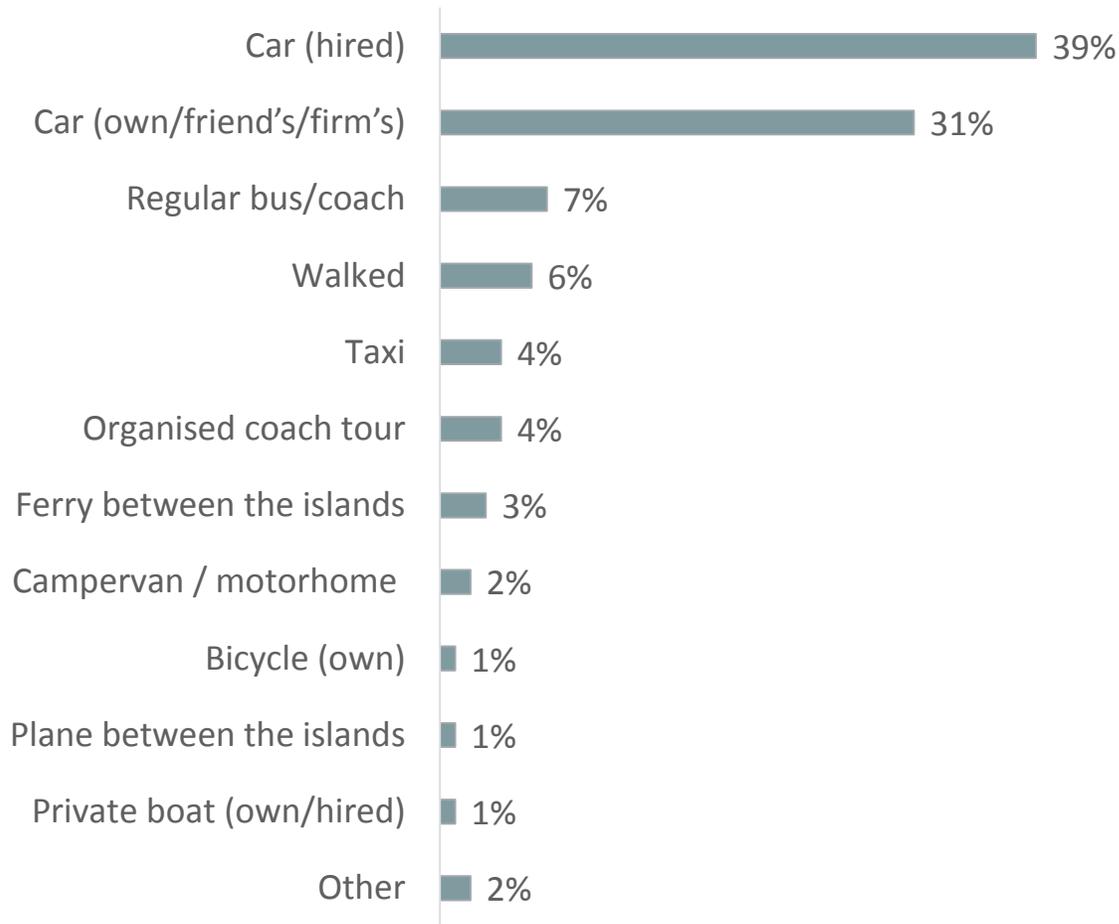
Base (All Business): 198

# Trip profile

## Transport

- The largest proportion of visitors (70%) reported that they had travelled by car during their visit – 39% using a hired car and 31% using a privately owned car.
- Some 7% of visitors used a bus or coach during their trip, while 6% said they had been on a walking holiday. Other forms of transport were mentioned by smaller minorities of visitors.
- Using a privately owned car was more frequently mentioned by VFR visitors (60%) than Leisure (26%) or Business (26%) visitors. Hire cars were more frequently mentioned by Business visitors (49%) than VFR (23%) or Leisure visitors (36%) visitors.

## Main type of transport during visit



Q22: What was the main type of transport you used during your visit to Shetland, i.e. whilst on the island/s?

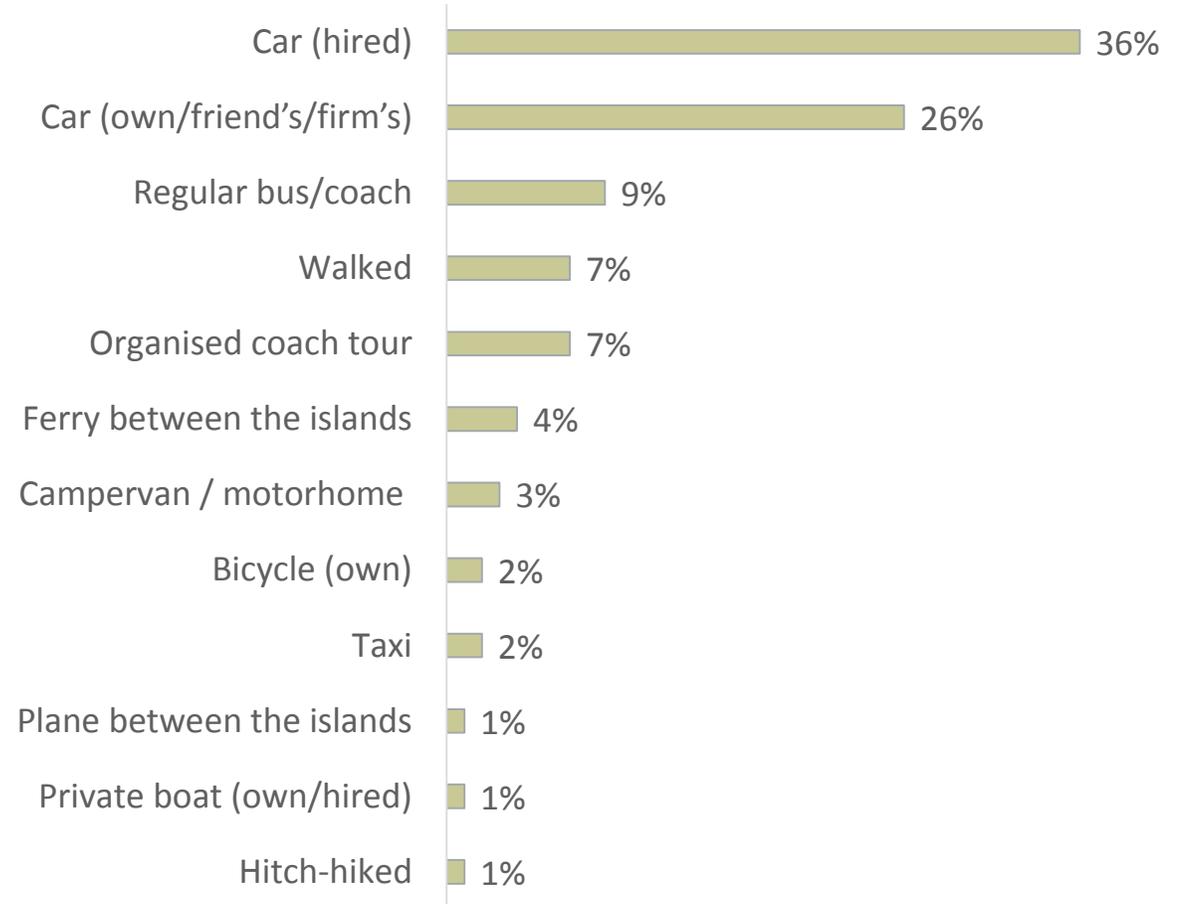
Base (All, excluding rotational shift workers): 825

# Trip profile

## Transport

- Cars were the most often used transport for Leisure visitors, including both rental cars (36%) and private cars (26%).
- Leisure visitors from Scotland (46%) and the rest of the UK (29%) were more likely to use a privately owned car than those from overseas (10%).
- 52% of overseas Leisure visitors reported using a hire car.
- Older Leisure visitors aged 55 and over were more likely than younger people to travel in an organised coach tour (10%).

## Main type of transport during visit – Leisure visitors

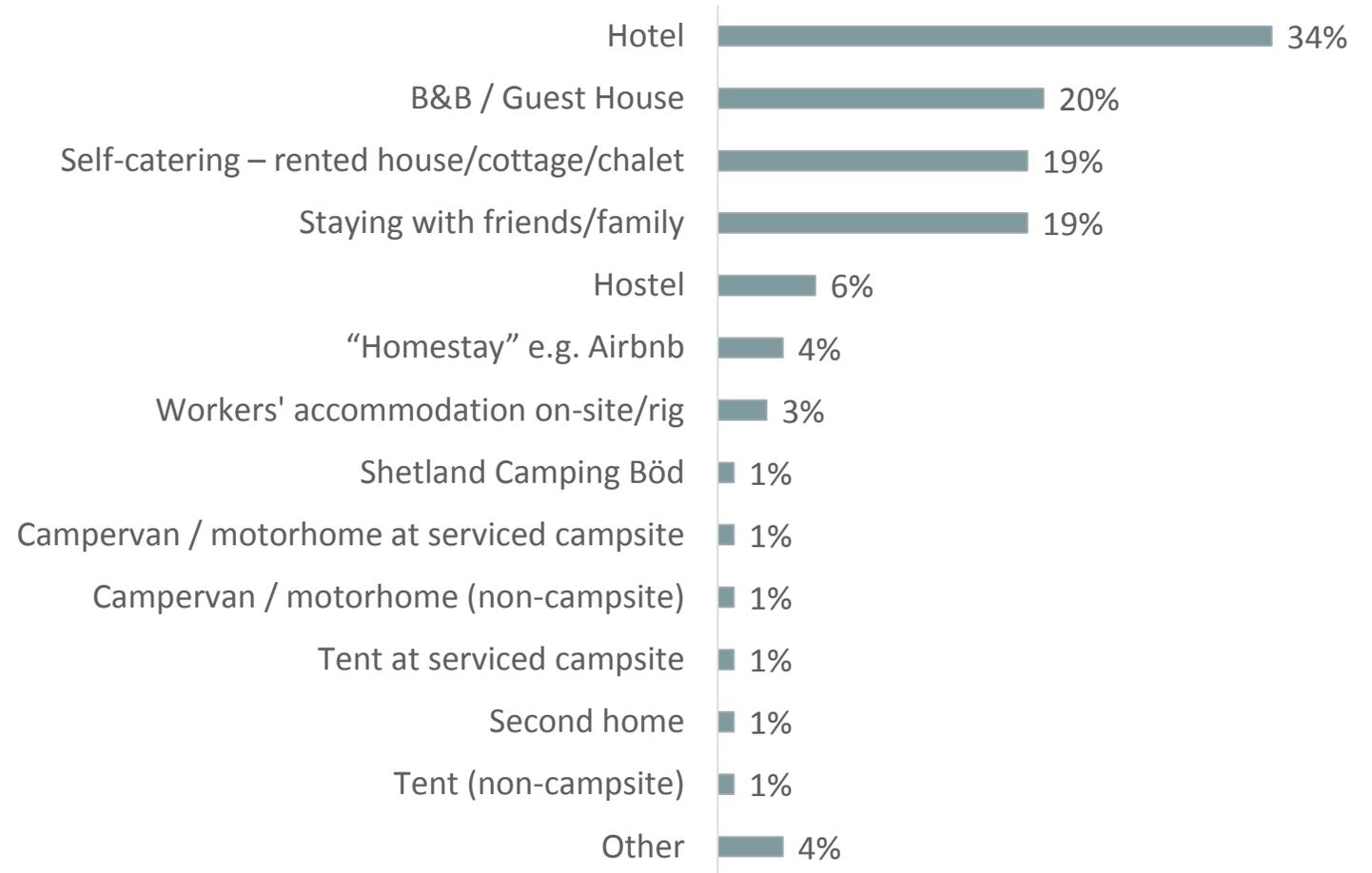


# Trip profile

## Accommodation

- Hotels (34%) were the most often used type of accommodation for overnight visitors, followed by B&Bs (20%), self-catering accommodation (19%) and staying with friends/family (19%).
- Hotels were particularly prevalent amongst Business visitors (56%), compared to Leisure (26%) and VFR (10%) visitors.
- B&B accommodation was most commonly used by Leisure visitors (27%), compared to VFR (5%) and Business (14%) visitors
- As expected, the majority of VFR visitors were staying with friends or relatives (72%).

## Accommodation stayed in during visit – Overnight visitors



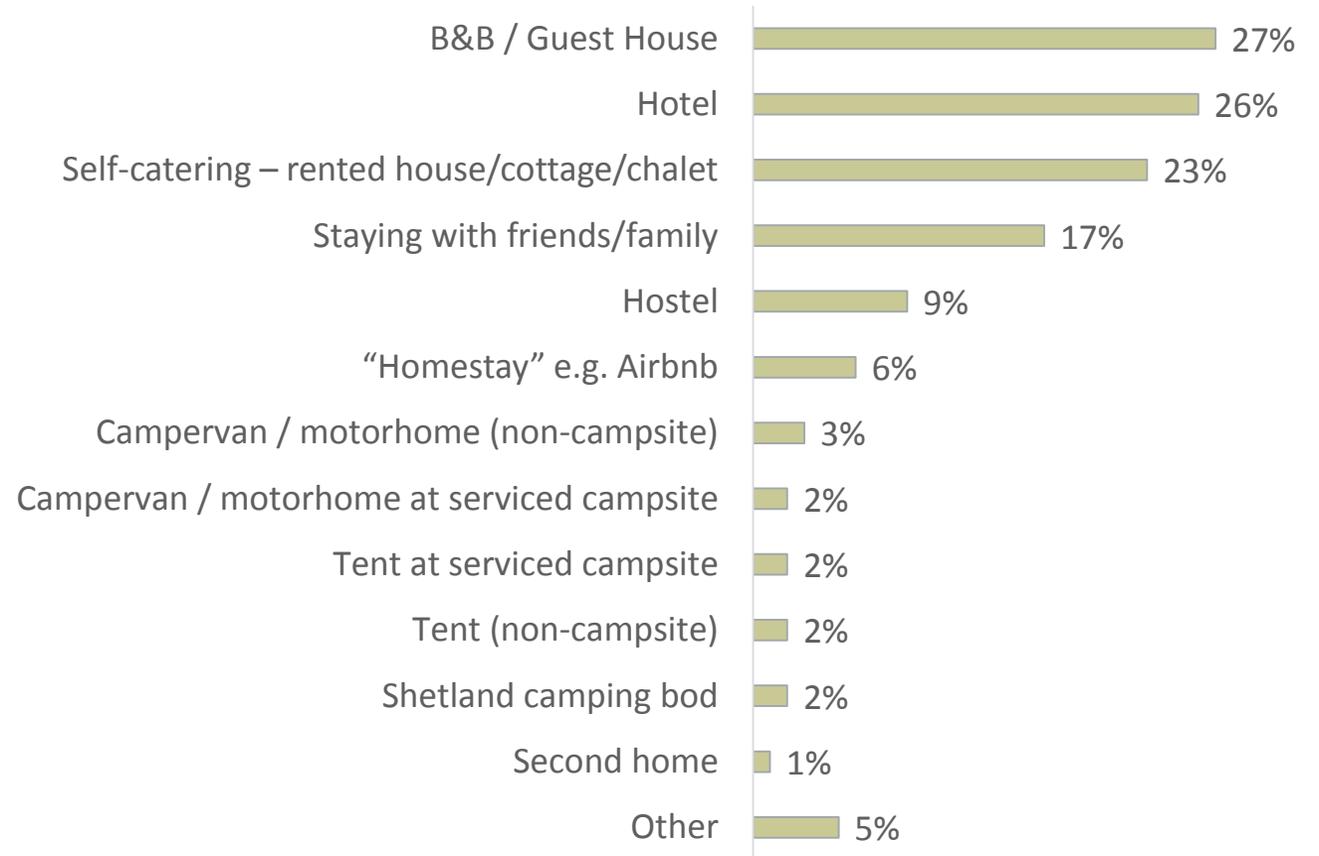
Base (All overnight visitors): 802

# Trip profile

## Accommodation

- B&B/guest house accommodation was the preferred option for just over a quarter (27%) of Leisure visitors. A further 26% stayed in hotels and 23% in self-catering accommodation.
- Overseas visitors were the most likely to stay in B&Bs (37%), with rates highest for visitors from North America (47%).
- Self-catering was more often selected by Leisure visitors from the rest of UK (30%) than overseas (17%). 'Homestay' options were more often selected by Leisure visitors from Europe (15%) than visitors from Scotland (5%) or the rest of the UK (3%)
- Younger respondents aged under 35 years were less likely than average to stay in a hotel (9%) and more likely than average to stay in a 'Homestay' property (14%), a hostel (15%) or a tent – off campsite (10%).

## Accommodation stayed in during visit – Overnight Leisure visitors



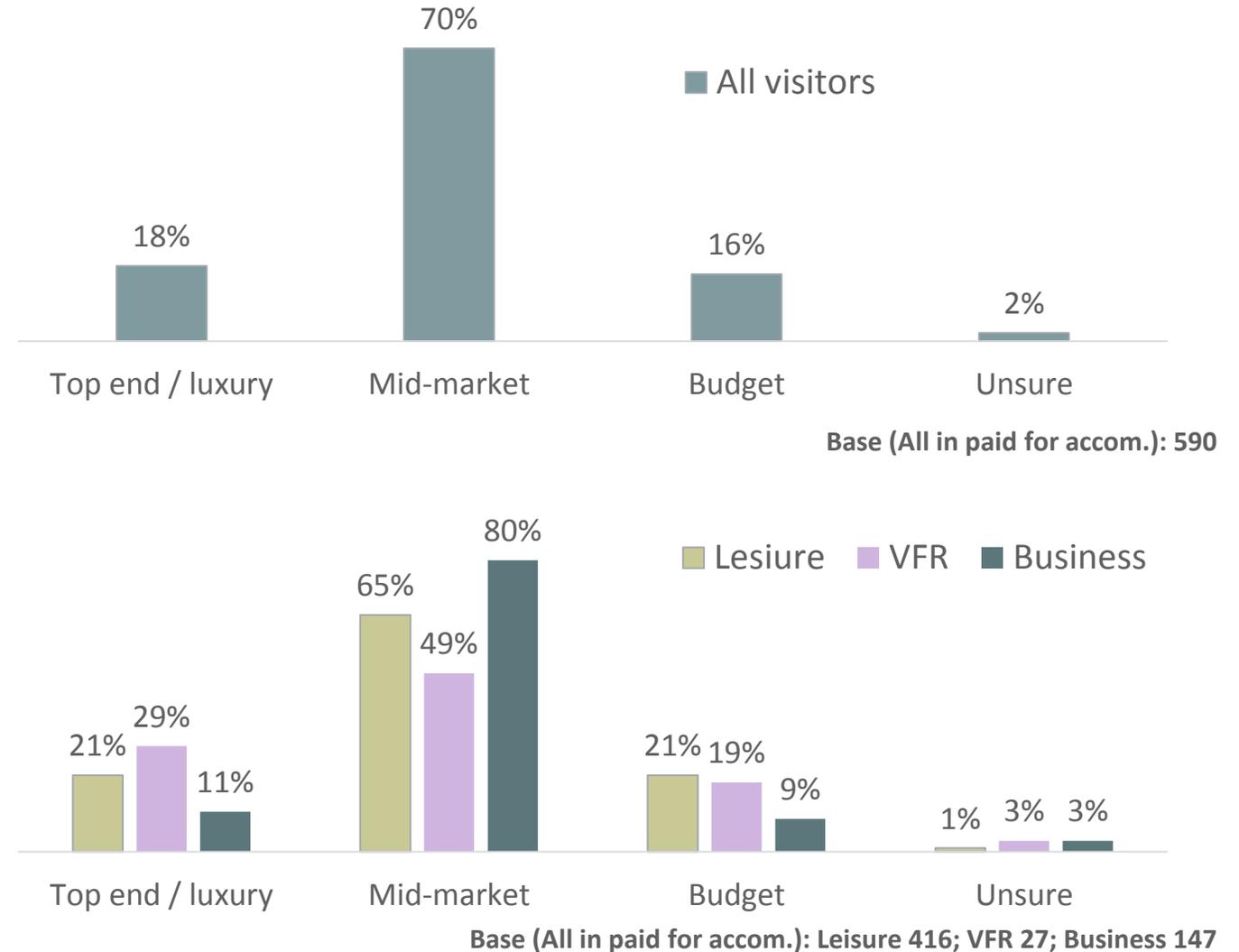
Base (All overnight Leisure visitors): 535

# Trip profile

## Accommodation

- The majority (70%) of visitors to Shetland who were staying in paid for accommodation described their accommodation as 'mid-market'.
- Of the remainder, there was an almost even split between those staying in luxury (18%) and budget (16%) accommodation.
- The Leisure visitor profile is very similar to the average. Business visitors are more likely to report mid-market accommodation, and less likely to report either top or bottom end accommodation.
- Interestingly, a higher proportion of rest of UK (29%) Leisure visitors described their accommodations as 'top end' than Scottish (14%) and overseas visitors (17%).
- Under 35 year old Leisure visitors were more likely to stay in budget accommodation (51%) than those in older age groups.

## Type of accommodation – Overnight in paid for accommodation

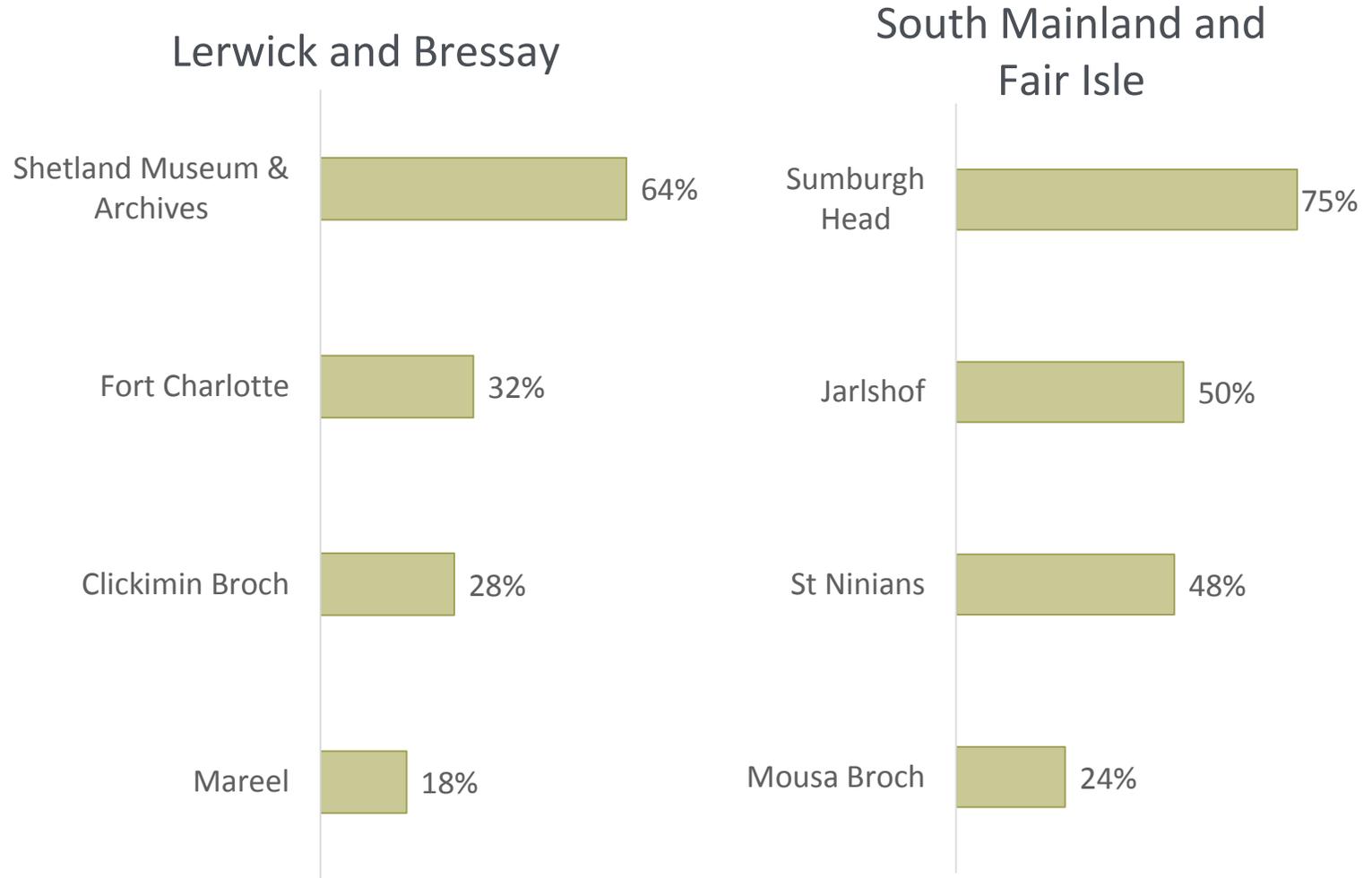


# Trip profile

## Attractions visited

- Visitors were asked what attractions they visited on each of the Islands. The top four responses have been provided for the four most popular areas visited. Results for North Isles and Westside/Central Mainland are shown overleaf.
- The main attraction visited on Lerwick by Leisure visitors was Shetland Museum & Archives.
- For those visiting the South Mainland the main attraction was Sumburgh Head, followed by Jarlshof.
- For both areas Leisure visitors from overseas were much more likely to visit at least one attraction on the list compared to Scotland visitors.

## Visitor attractions on Shetland visited - Leisure visitors



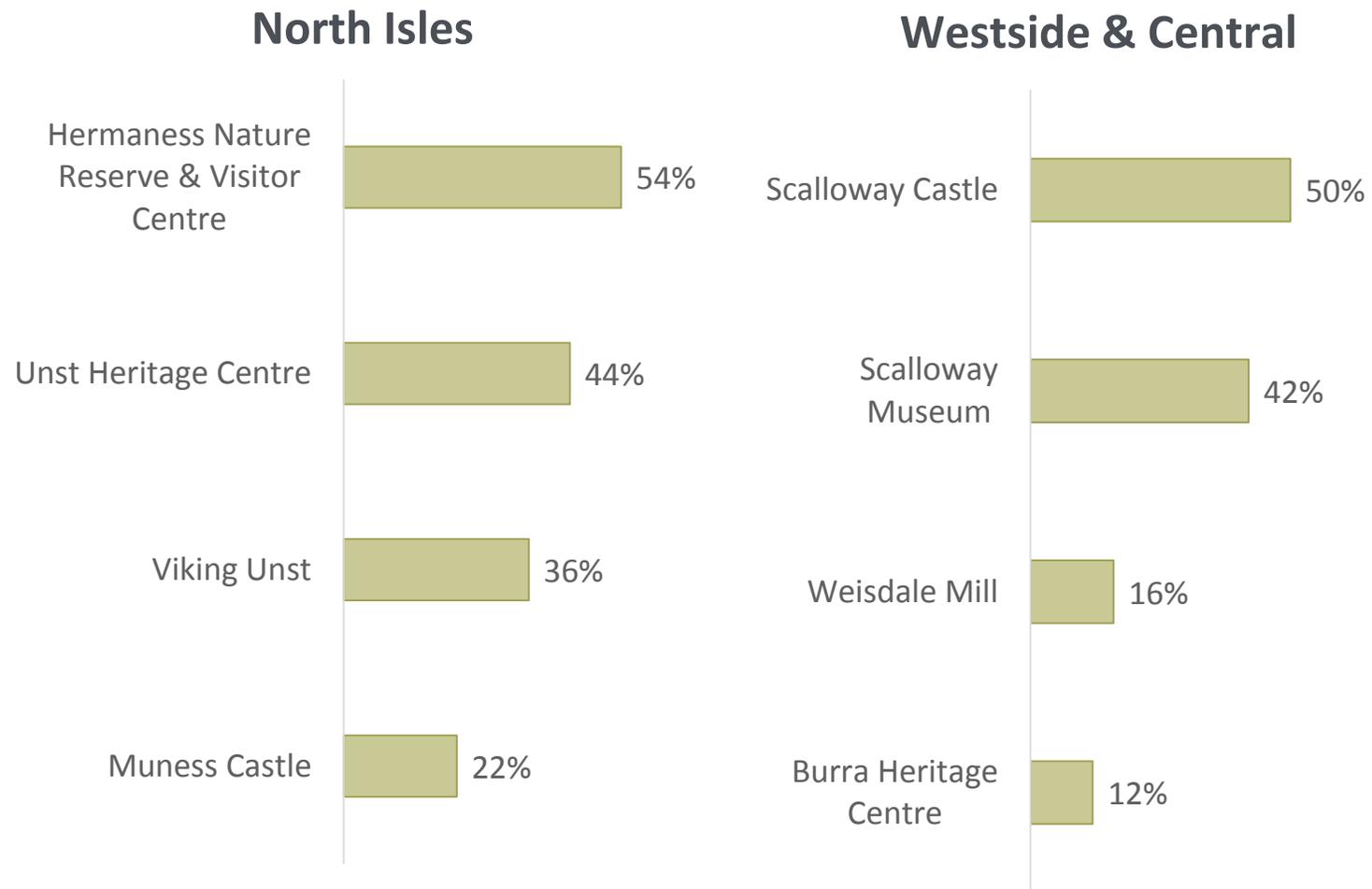
Base (All Leisure who visited the island): Lerwick – 541, South Mainland & Fair Isle - 444

# Trip profile

## Attractions visited

- Of those who visited the North Isles the most popular attraction was Hermaness Nature Reserve. Just under half also visited the Unst Heritage Centre.
- Those visiting from Scotland were the least likely to visit Hermaness Nature reserve (41%).
- For those visiting the West or Central Mainland Scalloway Castle and Museum were the most popular attractions.
- Leisure visitors from overseas were more likely to visit at least one attraction on the list for both areas than those from Scotland.
- The top attractions on Northmavine, Lunnasting and Whalsay were Eshaness (60%), Tangwick Haa Museum (24%) and Lunna Kirk (21%).

## Visitor attractions on Shetland visited - Leisure visitors



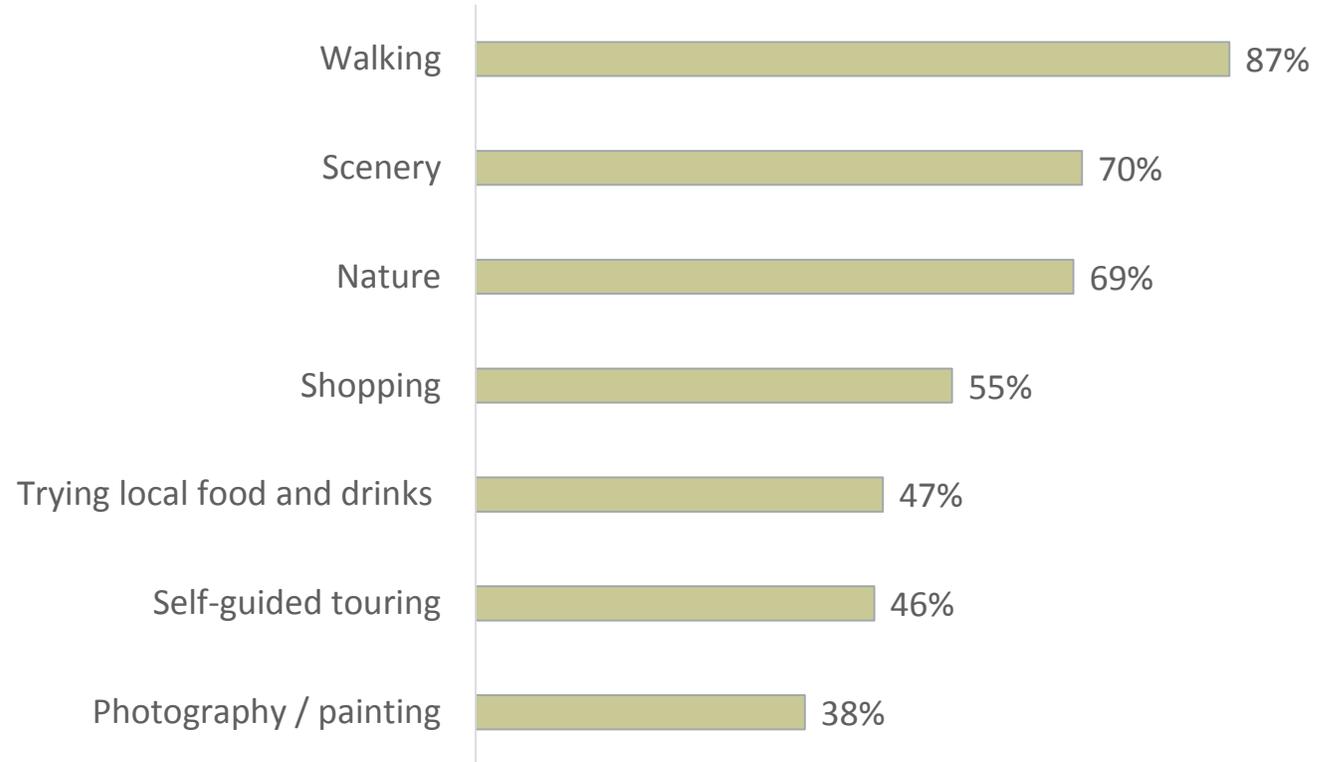
Base (All Leisure who visited the island): North – 290, Westside & Central Mainland - 431

# Trip profile

## Activities

- Respondents were also asked what activities they participated in during their trip to Shetland. The data shown here combines the figures from the chart over to show grouped activities, such as walking (including long and short walks), scenery (beaches, viewpoints, etc.) and shopping (local crafts and other).
- The majority took part in a variety of activities including walking (87%), enjoying scenery (70%), nature (69%) and shopping (55%).
- Visitors from overseas (92%) were more likely to mention walking than those from Scotland (80%), while those from overseas (74%) and those from the rest of the UK (73%) were more likely to mention nature than visitors from Scotland (56%).
- A more detailed breakdown of activities is shown over.

## Top activities on Shetland - Leisure visitors

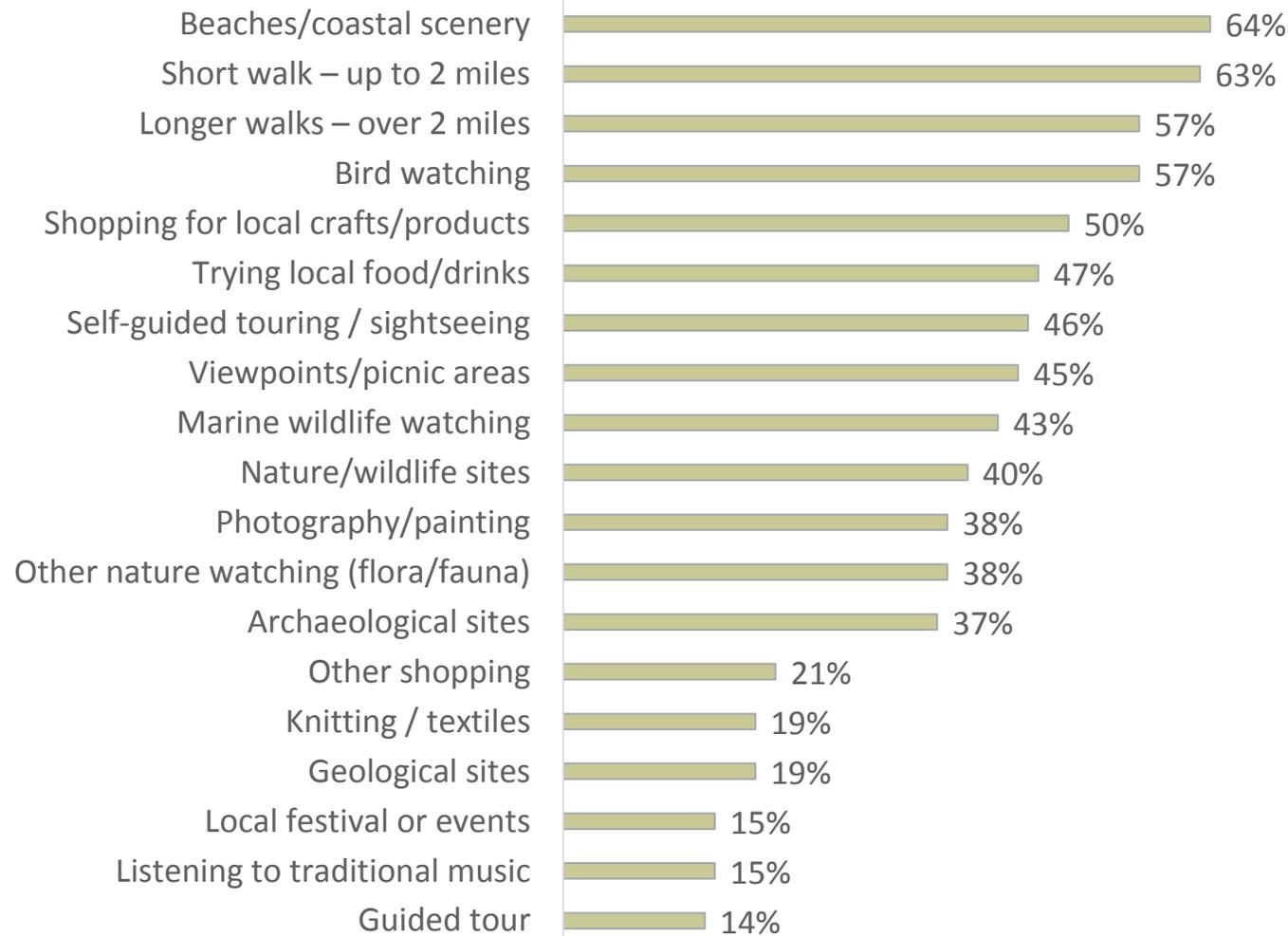


# Trip profile

## Activities

- At least half of Leisure visitors participated in the top four most popular activities – beaches/coastal scenery, shorts walks, longer walks and bird watching.
- Experiencing local produce was also very prevalent, with 50% shopping for local crafts/products and 47% trying local food and drinks.
- Around two-fifths of Leisure visitors also mentioned sight-seeing and viewpoints, marine wildlife and other nature watching, and visiting sites of archaeological interest.
- Also of interest to a significant minority of visitors were textiles and music.
- Around 15% of Leisure visitors mentioned going to a local festival or event. These events included Up Helly Aa, Unst Festival and Wool Week, as well as other individual personal events.

## Top activities on Shetland in detail - Leisure visitors



Base (All Leisure): 551

Q62: Did you take part in any of the following activities during your visit to Shetland?

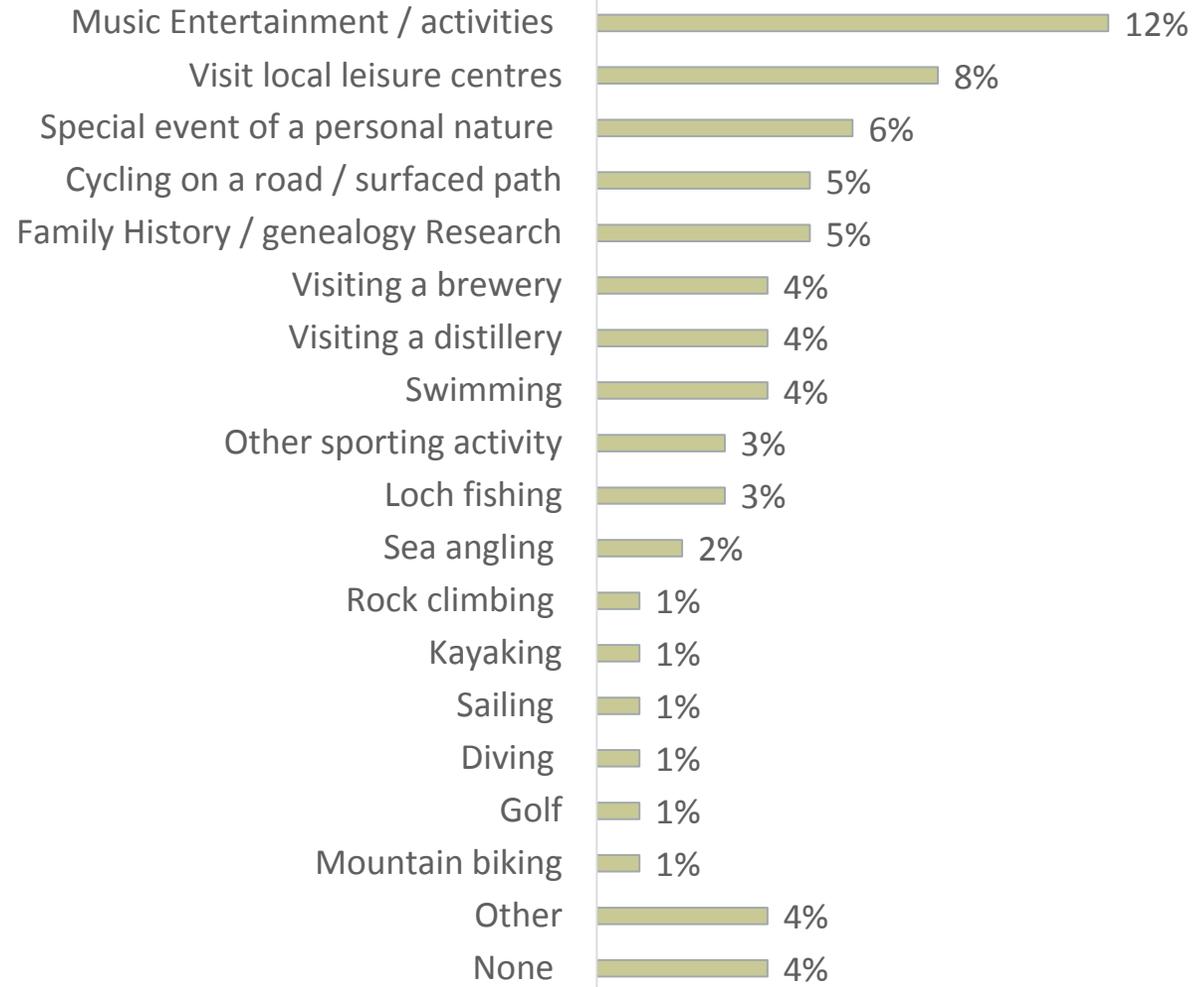
# Trip profile

## Activities

- This chart shows activities selected by smaller numbers of Leisure visitors. These tended to be niche activities, such as genealogy, visitor centres and specific sports.



## Other activities on Shetland - Leisure visitors



Q62: Did you take part in any of the following activities during your visit to Shetland?

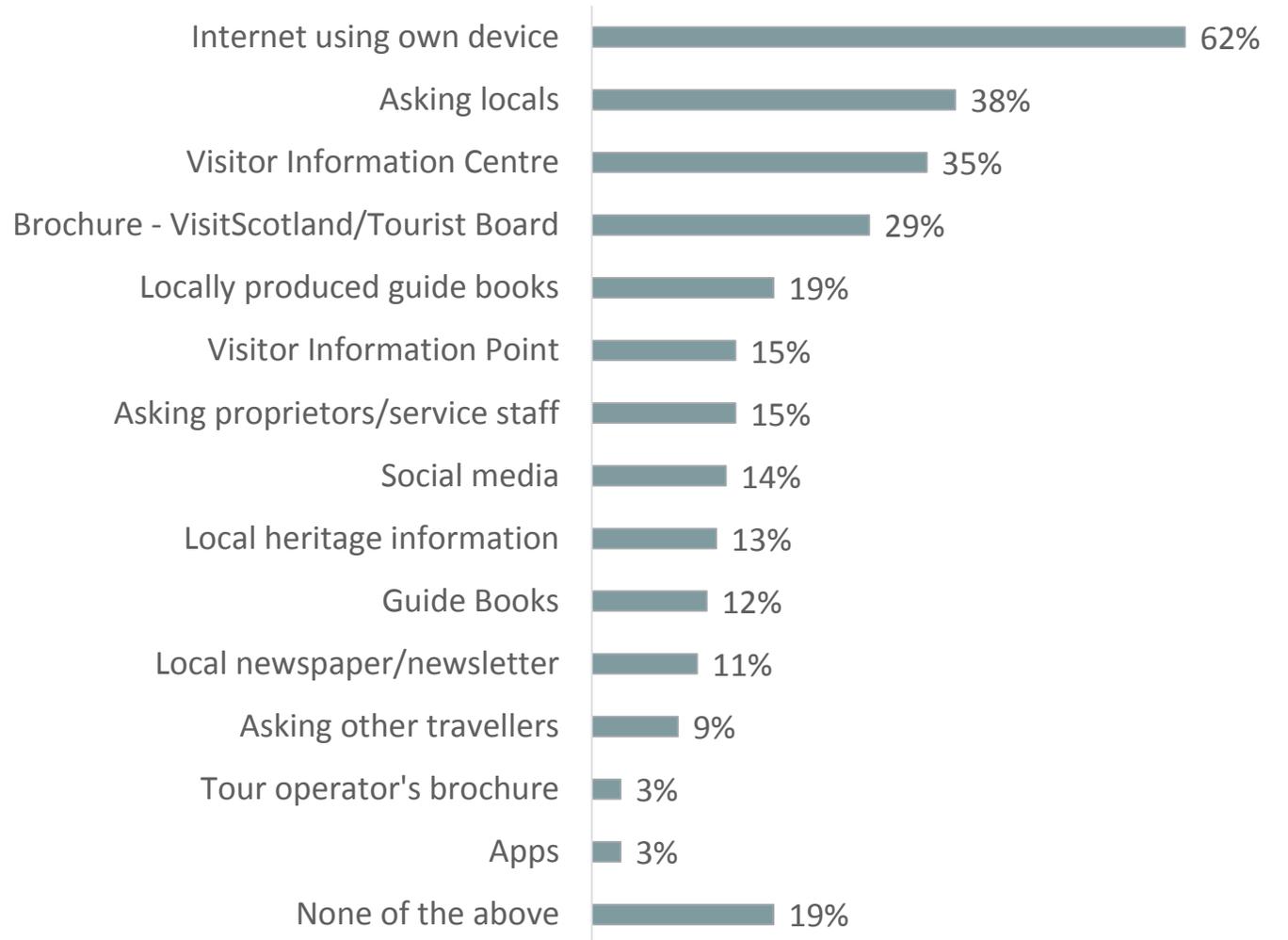
Base (All Leisure): 551

# Trip profile

## Information

- As well as being the main source of information when planning a trip to Shetland, the Internet (62%) was also the main source of information during the trip.
- Almost two fifths of visitors also mentioned asking locals, while 15% talked to proprietors and staff.
- Visitor centres were also widely utilised, with 35% of all visitors mentioning this as a source of information. As we would expect, Leisure visitors were more likely to use visitor centres (53%) than VFR (19%) or Business (11%) visitors.
- In fact, higher proportions of Leisure visitors used almost all information sources than VFR or Business visitors. A full breakdown of the information sources used by Leisure visitors is detailed over.
- The Apps used included Google maps, VisitScotland and Tripadvisor.

## Sources of information during trip to Shetland



Base (All, excluding rotational shift workers): 825

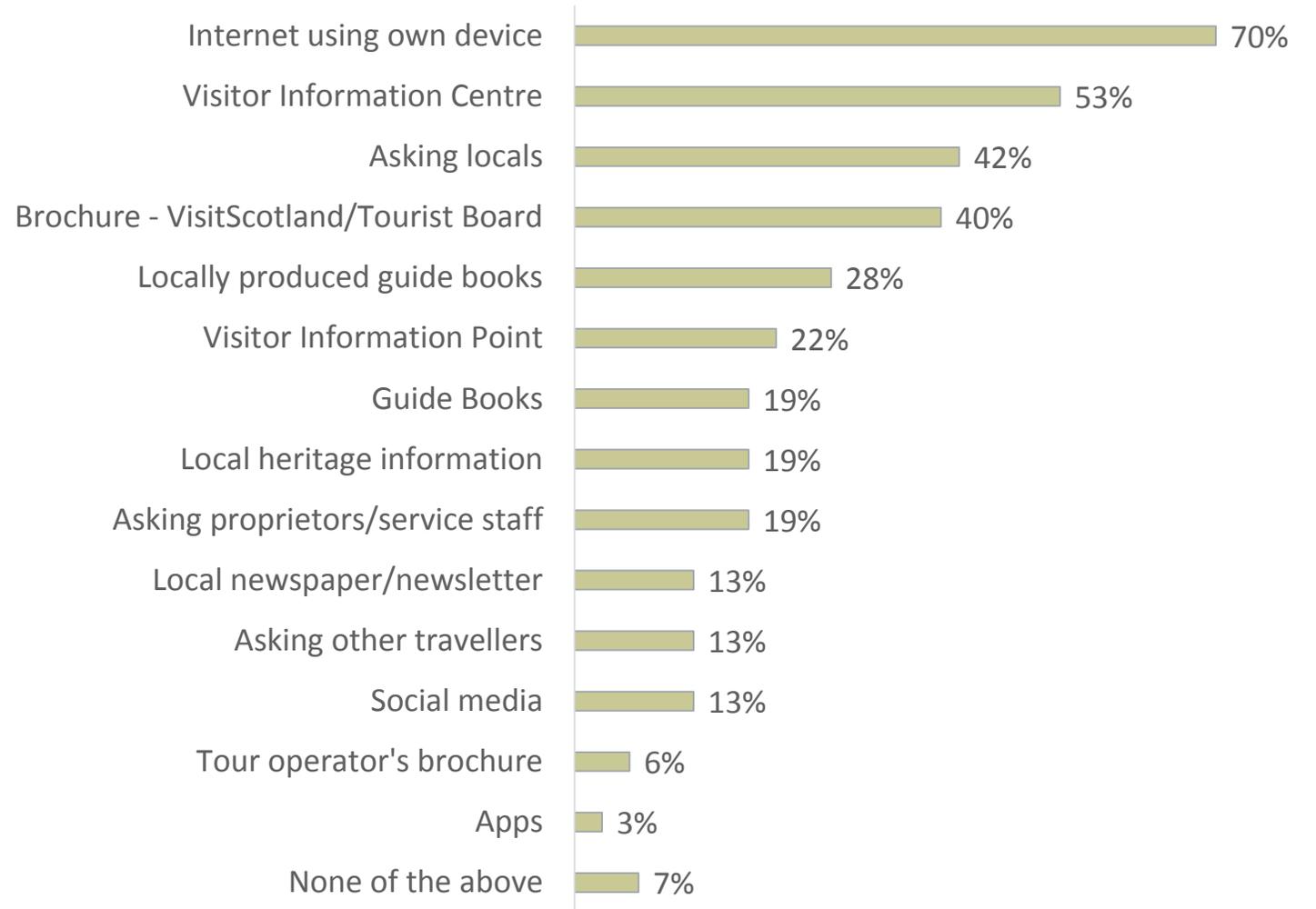
Q64: During your recent visit to Shetland which of the following methods did you use to obtain information about places to visit and things to do?

# Trip profile

## Information

- A wide range of sources of information were accessed by Leisure visitors, with many using more than one.
- Accessing the internet was the most prevalent way of looking for information during their trip for Leisure visitors (70%), followed by going into visitor information centres (53%). Over two fifths cited local people as a source of information on their trip.
- Lower proportions of Scotland visitors (34%) used visitor information centres than rest of UK (57%) and overseas visitors (62%).
- Those from overseas were more likely to use the internet (overseas 79%; Scotland 60%); VisitScotland brochures (overseas 56%; rest of UK 31%; Scotland 30%) and guide books (overseas 26%; Scotland 10%).

## Sources of information during trip to Shetland – Leisure visitors



Base (All Leisure): 551

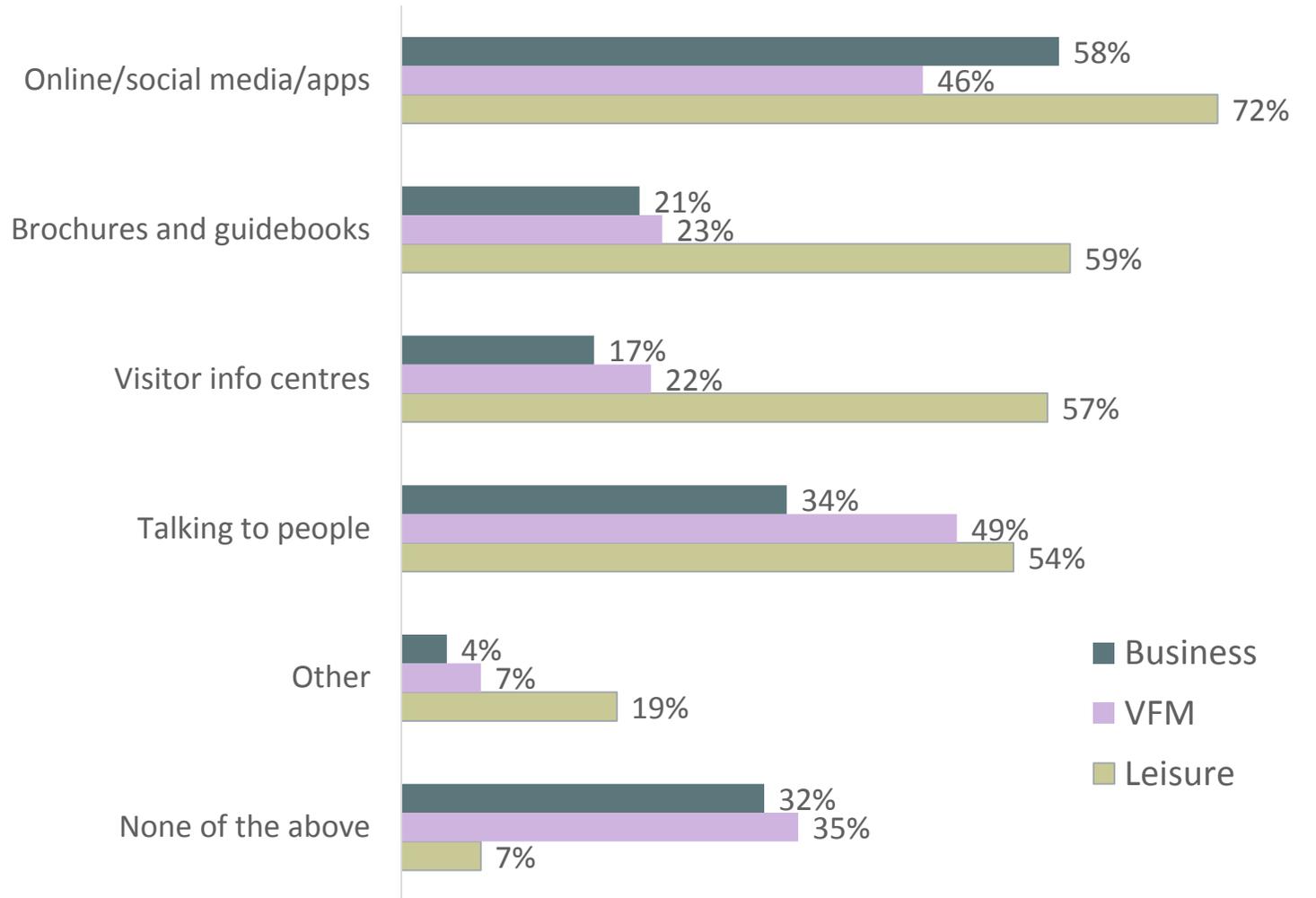
Q64: During your recent visit to Shetland which of the following methods did you use to obtain information about places to visit and things to do?

# Trip profile

## Information

- The types of information used during the trip have been grouped here to show key differences between the visitor types.
- Generally Leisure visitors use multiple sources, including online/social media/apps (72%), brochures/guidebooks (59%) and visitor information centres (57%).
- Around half of Leisure and VFR visitors were likely to talk to people to source information. For both groups, this is most likely to be asking local people (Leisure 42%; VFR 44%), but also included proprietors/service staff (Leisure 19%; VFR 7%) and other travellers (Leisure 13%; VFR 2%).
- Amongst Leisure visitors, younger respondents (87% of under 35s) were more likely to use online sources than those in older age groups (65% of over 65s).

## Sources of information during trip to Shetland



Base (All, excluding rotational shift workers): Leisure 551; VFR 105; Business 169

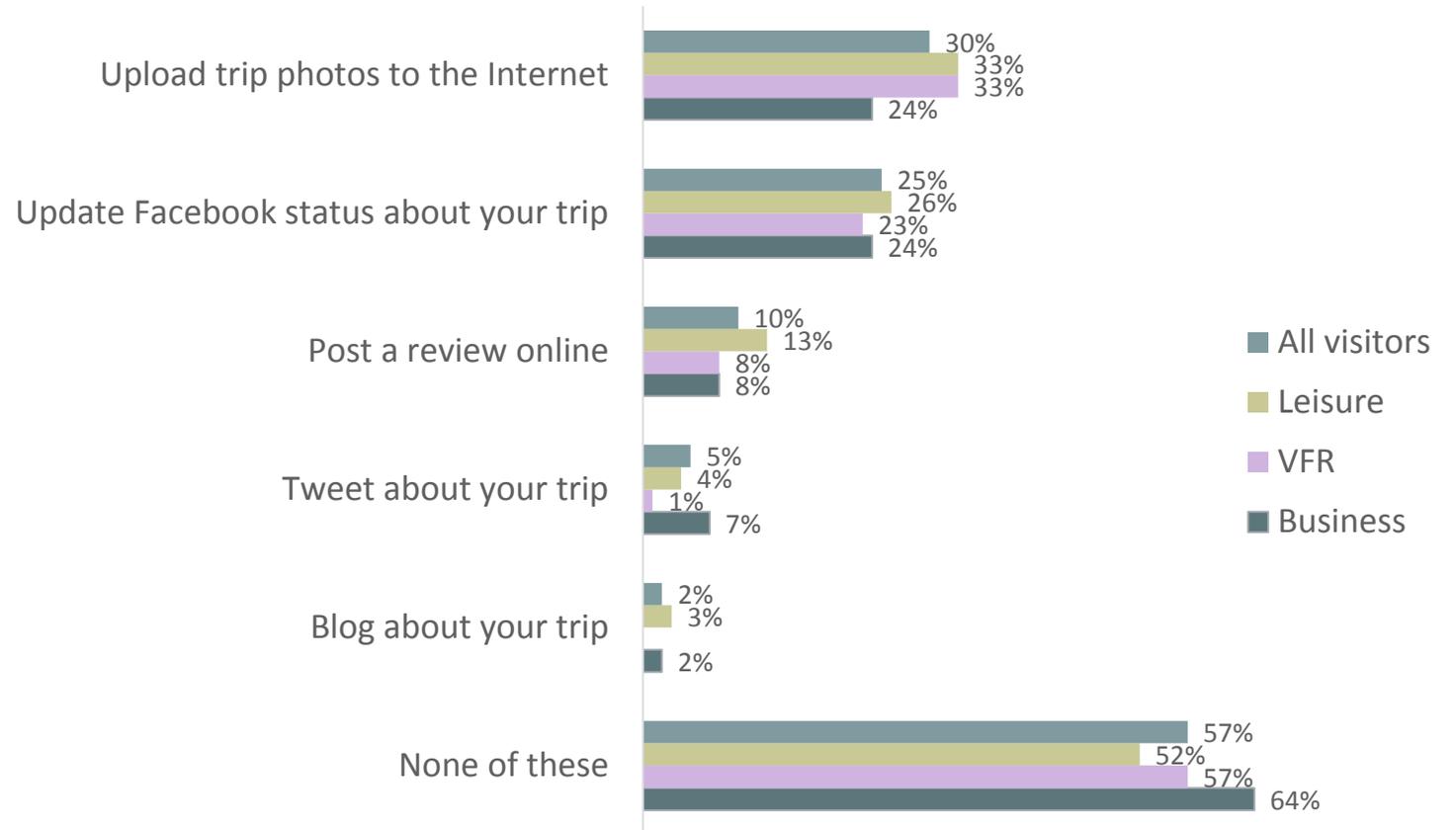
Q64: During your recent visit to Shetland which of the following methods did you use to obtain information about places to visit and things to do?

# Trip profile

## Information

- In total, 43% of visitors reported engaging in online or social media activity about their trip to Shetland. This proportion varied by visitor type – 48% of Leisure visitors, compared to 43% of VFR and 36% of Business.
- The most often cited activity (30% of visitors) was uploading trip photos to the internet (e.g. to Facebook), while a further 25% reported updating their Facebook status in relation to the trip.
- One in ten visitors reported that they had posted an online review. Amongst Leisure visitors this rose to 13%.
- Overseas Leisure visitors (55%) were the most likely to use social media during or after their trip – particularly those from North America (62% did at least one of the things listed). Specifically, North America visitors were the most likely to upload photos (50%) and/or update Facebook (40%).

## Online / social media activity during or after trip to Shetland



Base (All, excluding rotational shift workers): Total 825; Leisure 551; VFR 105; Business 169

# Qualitative Findings

## During the trip



Most qualitative respondents said they didn't do much research during their trip. Those that did used the local tourist office or spoke to local people who were strong advocates for the islands.

*I visited the other side of the Island whilst I was there also, and I used public transport to get there, so the web was important for the details of the bus times etc. but just speaking to people were great – they were all very helpful.*

*I wanted to do my own trail of interest to do with knitting but the books I found on the island were out of date.*

*I popped into the visitor information centre. I got some quite generic information about things to do and what was available.*

*I spoke to the staff in the hotel – they were helpful.*

*I didn't spend a lot of time looking for information, I just drove and was happy to stop at anywhere I came across.*

*I felt that Shetland was so little that I would be able to see most of it without much planning or searching. I am from Australia and used to a bit of driving.*

# Trip profile

## Summary



### Leisure visitors

- Almost all (97%) were staying overnight – overnight visitors typically stayed for 1 to 3 nights (29%) or 4 to 7 nights (46%)
- Slightly more stayed in B&Bs (27%) and hotels (26%) than in self-catering accommodation (23%).
- Travel around the islands was typically by car.
- Almost two-fifths were visiting as a couple, a fifth were in family group and a quarter were travelling alone. Less than 1 in 10 had children under 16 years old in their group.
- The top attractions on Lerwick were the Shetland Museum and Archives and Fort Charlotte. The top attractions on the West and Central Mainland were Scalloway Castle and Museum. For North Isles it was Hermaness and on South Mainland it was Sumburgh Head.
- The top activities were walking, enjoying the scenery and enjoying nature.
- Most reported finding information online during their trip, although more than half had visited a visitor information centre and/or talked to local people, staff etc.

### VFR Visitors

- Most (92%) were staying overnight – overnight visitors typically stayed for 1 to 3 nights (27%) or 4 to 7 nights (46%).
- Almost three-quarters stayed with friends or relatives.
- Two-fifths were travelling alone; 29% were visiting as a couple and 33% in a family group. 10% reported that they had children in their group.

### Business visitors

- Higher proportion of day visitors (14%) than other visitor types. Overnight visitors tended to stay for less than 3 nights (58%).
- Most travel alone (65%) and stayed in a hotel (56%).
- The majority visited Lerwick (81%), while around a third visited South Mainland, Central Mainland and or North Mainland.



# Evaluation of trip experience

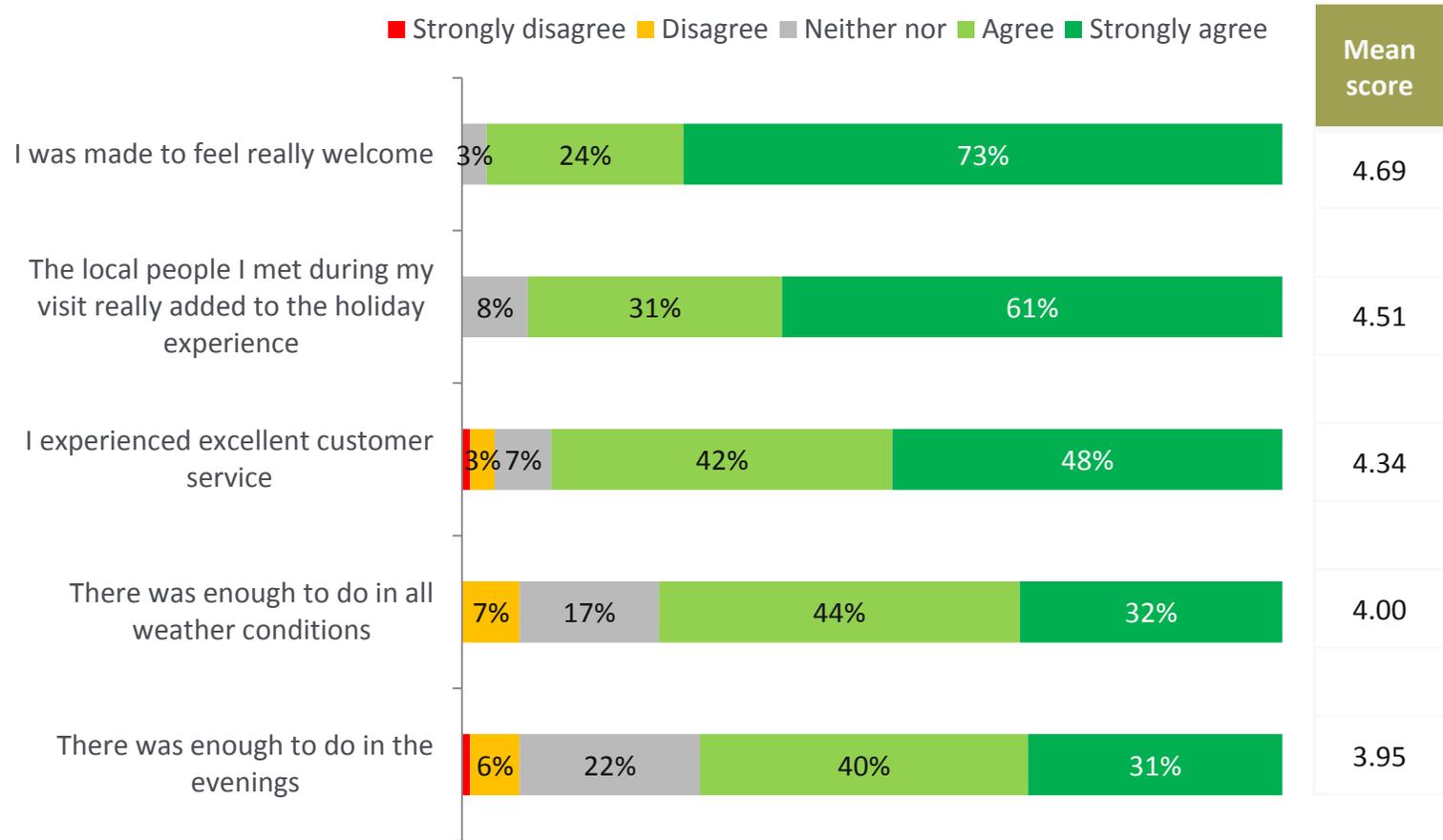
# Trip evaluation

## Overall experience

- When asked to agree or disagree with a series of statements about their visit to Shetland, the majority of Leisure/VFR visitors provided positive responses.
- The strongest levels of agreement were noted for statements around interactions with local people in Shetland, for example, being made to feel welcome and customer service. Over 85% of respondents agreed with these statements with the larger proportions agreeing strongly.
- Agreement was weaker for the range of things to do in all weather conditions and in the evenings. However, most respondents did agree with these statements, indicating that generally visitors were satisfied with these aspects of their trip.



## Agreement with statements about experience on Shetland – Leisure/VFR



Base (All Leisure/VFR excluding 'don't know' responses): 586 - 652

Mean score calculated, whereby 1 is strongly disagree and 5 is strongly agree.

# Trip evaluation

## Overall experience – sub-sample analysis



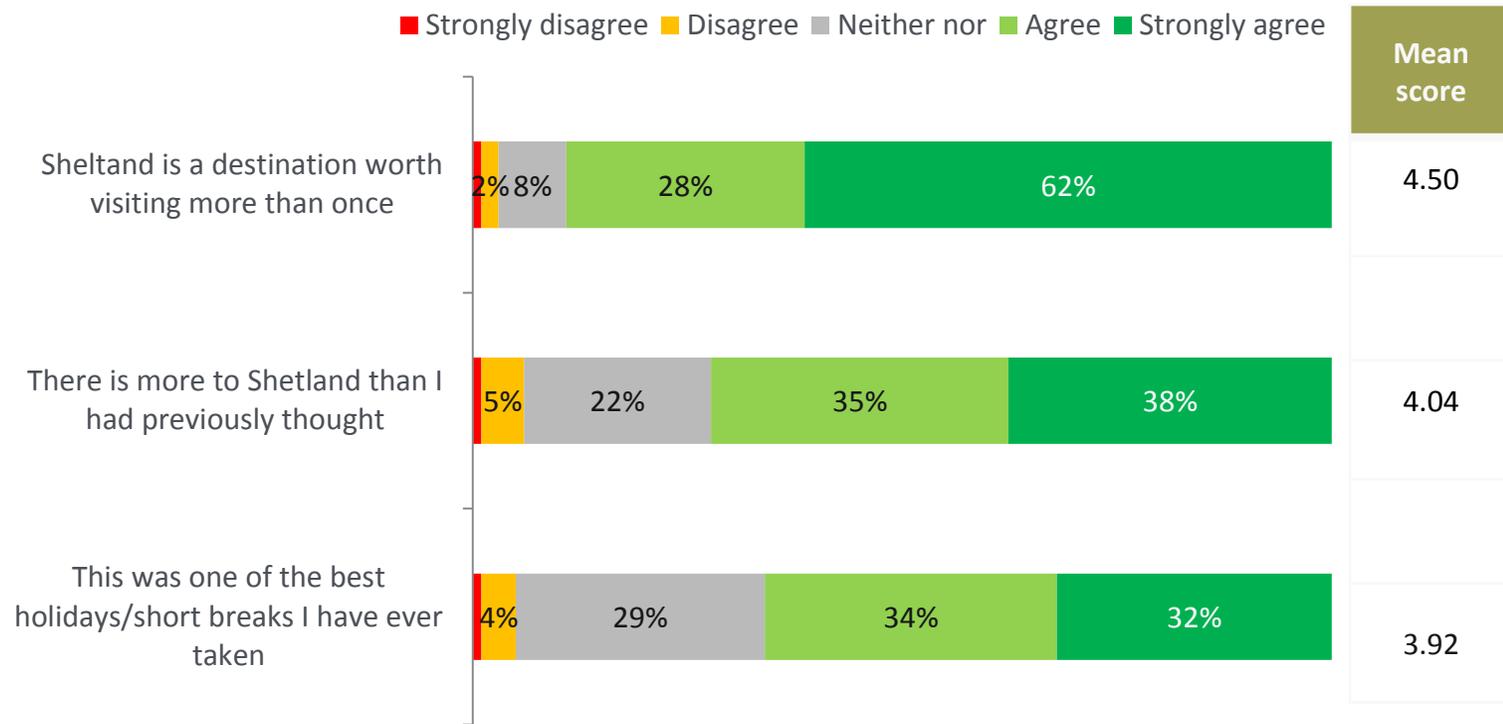
- European Leisure visitors tended to be less positive than visitors from other locations. Specifically, European visitors were less likely than other visitors to agree strongly that they were made to feel welcome (64%) and they experienced excellent customer service (49%).
- North American Leisure visitors, by contrast, tended to be the most positive in their appraisal – higher proportions agreed strongly with the statements, compared to visitors from the UK or other overseas countries. For example, 74% of North American visitors agreed strongly that they experienced excellent customer service - substantially higher than the proportion of Europeans (49%), Rest of UK (43%) and Scotland (53%). Three quarters of North Americans (78%) also agreed strongly that local people really added to their visit.

# Trip evaluation

## Overall experience

- Reflecting the positive experience the majority of visitors had on their trip to Shetland, 90% agreed that it is a destination worth visiting more than once (62% agreed strongly).
- Indeed, 73% agreed that there is more to Shetland than they had previously thought before visiting.
- Two thirds overall, agreed that their trip had been one of the best holidays or short breaks they had ever taken, with opinion evenly split between those who agreed strongly and agreed.
- Leisure visitors were more likely to strongly agree/agree with this statement (69%) than VFR visitors (52%).

## Agreement with statements about experience on Shetland – Leisure/VFR



Base (All Leisure/VFR excluding 'don't know' responses): 621-638

Mean score calculated, whereby 1 is strongly disagree and 5 is strongly agree.

# Trip evaluation

## Overall experience – sub-sample analysis



- Whilst overall agreement tended to be similarly high between Leisure visitors from different countries, North American visitors were again the most likely to agree strongly with statements. Indeed, 58% agreed strongly that it was the best holiday they have ever taken compared to 30% of Scotland visitors, 31% Rest of UK and 35% European visitors. Over half (55%) of North Americans also agreed strongly that there is more to Shetland than they previously thought.
- Female Leisure respondents (38%) were more likely than males (28%) to strongly agree that their visit had been one of the best holidays they had ever taken.

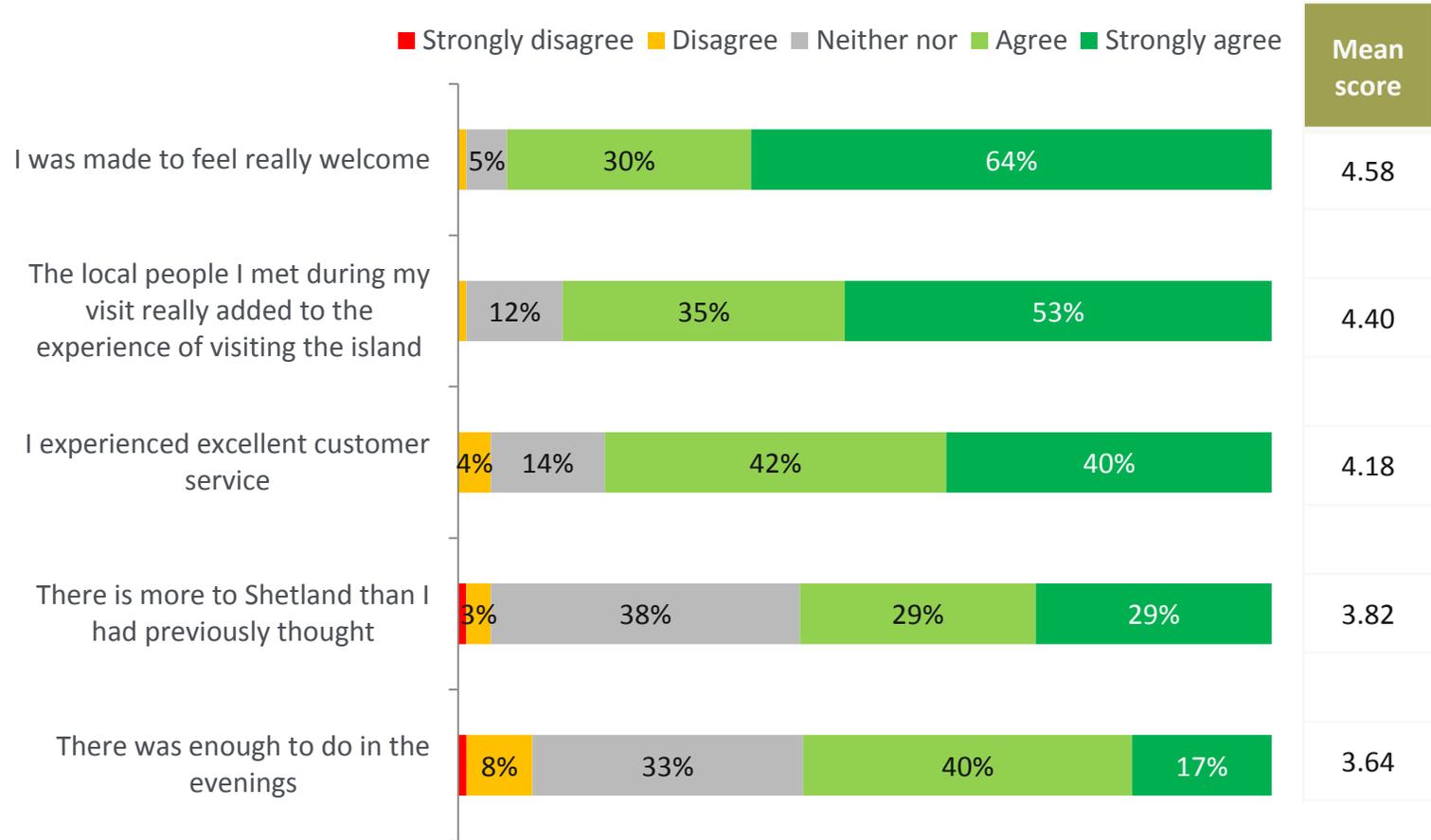
# Trip evaluation

## Overall experience

- The pattern of response across the Business visitors corresponded closely to the response from Leisure and VFR visitors.
- High levels of agreement were expressed by Business visitors regarding the positive impact of local people on their visit to Shetland.
- Business visitors were also broadly positive about having enough to do in the evenings, although only 17% agreed strongly with this statement.
- The general positive perceptions from Business visitors is also reflected in the fact that 58% agreed that there is more to Shetland than they had previously thought – with 29% agreeing strongly.



## Agreement with statements about experience on Shetland – Business



Base (All Business excluding rotational shift workers and 'don't know'): 138- 166

Mean score calculated, whereby 1 is strongly disagree and 5 is strongly agree.

Q66: Thinking of your experience in Shetland overall, to what extent do you agree or disagree with the following statements?

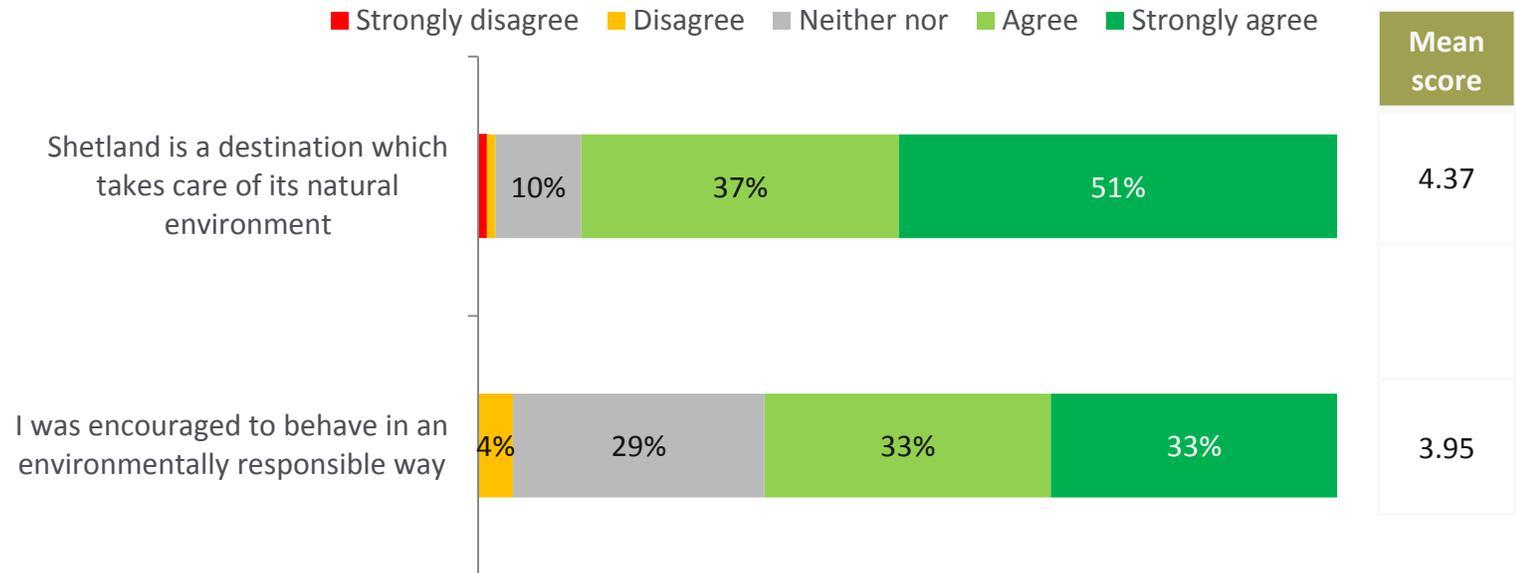
# Trip evaluation

## Environment

- The majority of visitors shared a perception that Shetland is an environmentally responsible destination.
- Some 88% of visitors agreed that Shetland takes care of its natural environment, with 51% agreeing strongly. Leisure visitors (57%) were more likely to agree strongly than Business visitors (42%).
- 66% of visitors also agreed that they themselves were encouraged to behave in an environmentally responsible way. Leisure visitors (39%) were most likely to agree strongly with this statement: compared with VFR and Business visitors at 26%.
- Leisure visitors from North America were more likely to agree strongly with these statements than those from the UK, Europe or other countries.



## Agreement with statements about experience on Shetland - Environment



Base (All excluding rotational shift workers and 'don't know'): 776– 800

Mean score calculated, whereby 1 is strongly disagree and 5 is strongly agree.

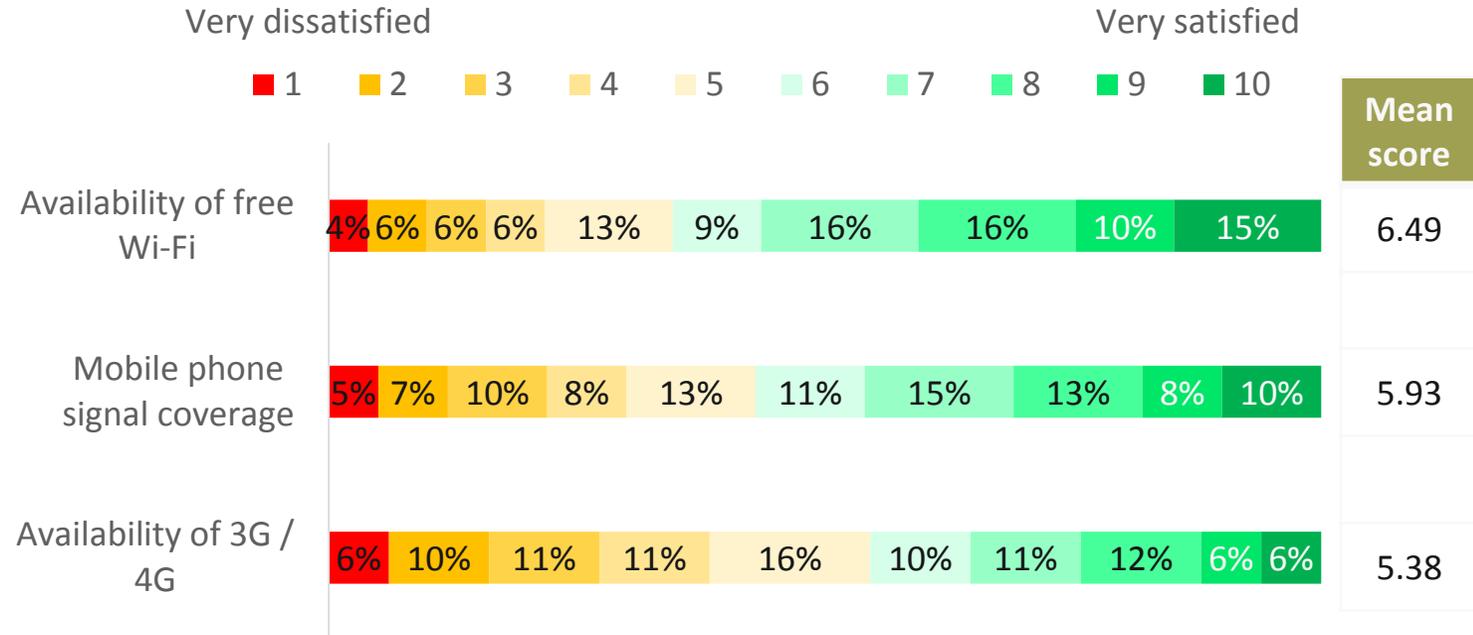
Q66: Thinking of your experience in Shetland overall, to what extent do you agree or disagree with the following statements?

# Trip evaluation

## Digital coverage

- Visitors were generally satisfied with the availability of free Wi-Fi on Shetland, with an overall mean score of 6.49 out of 10. However, the findings suggest room for improvement, with 35% scoring 5 or less.
- Visitors were fairly satisfied with the mobile phone signal (mean score 5.93). Nonetheless, 43% scored phone signal coverage with 5 or less, again suggesting scope for improvement.
- The area of greatest concern was the availability of 3G/4G on the islands. Opinion was almost evenly split on this aspect, with 54% scoring less than 5 out of 10 and 46% scoring 5 or more.
- Leisure visitors from North America tended to be slightly more satisfied with digital coverage than those from elsewhere.

## Satisfaction with digital coverage



Base (All excluding rotational shift workers and 'don't know'): 629 - 751

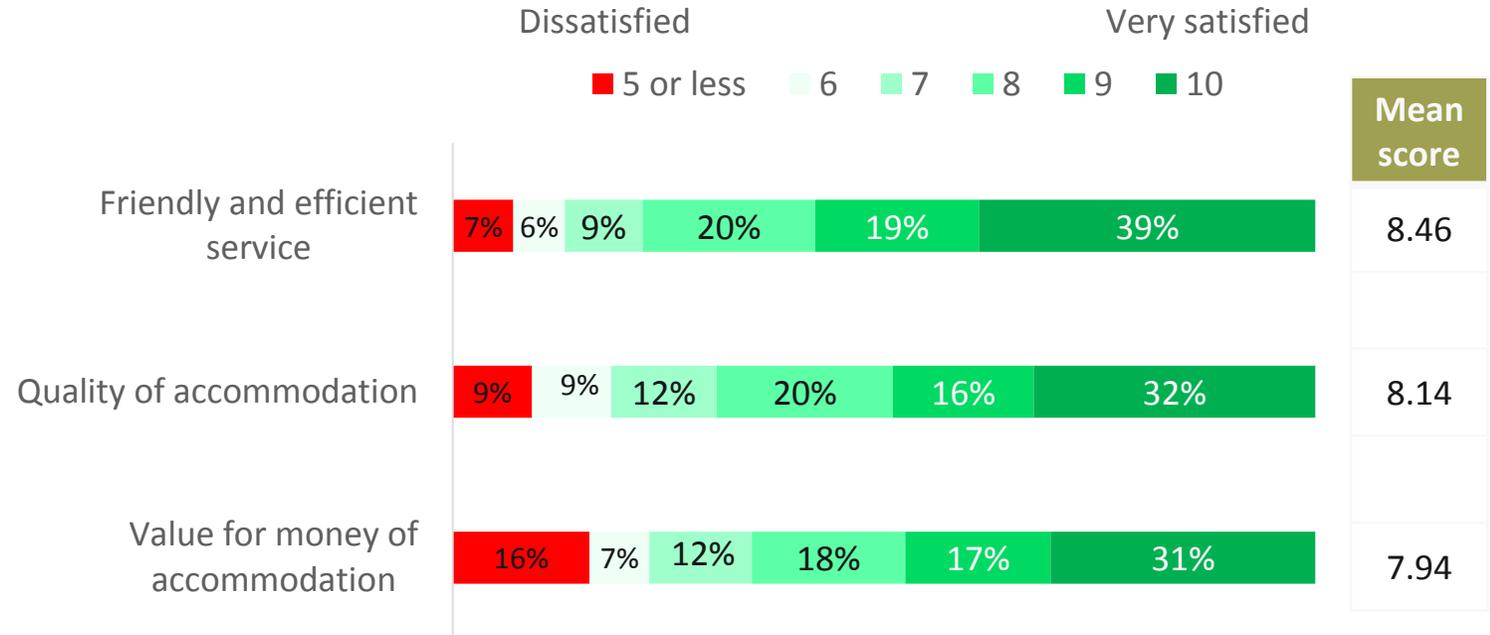
Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

# Trip evaluation

## Accommodation

- In general, visitors were satisfied with the quality, value for money and service received at their accommodation. In particular, the majority (58%) gave a score of 9 or 10 out of 10 for a friendly and efficient service.
- There were some minority concerns about the quality (9%) and value for money (16%) of accommodation scoring 5 or less.
- Satisfaction tended to be higher for Leisure and VFR visitors than for Business visitors.
- Leisure visitors from North America were more likely to give 10 out of 10 scores than those from the UK or other countries.

## Satisfaction with accommodation



Base (All staying in paid accommodation excluding 'don't know'): 546 - 571

Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

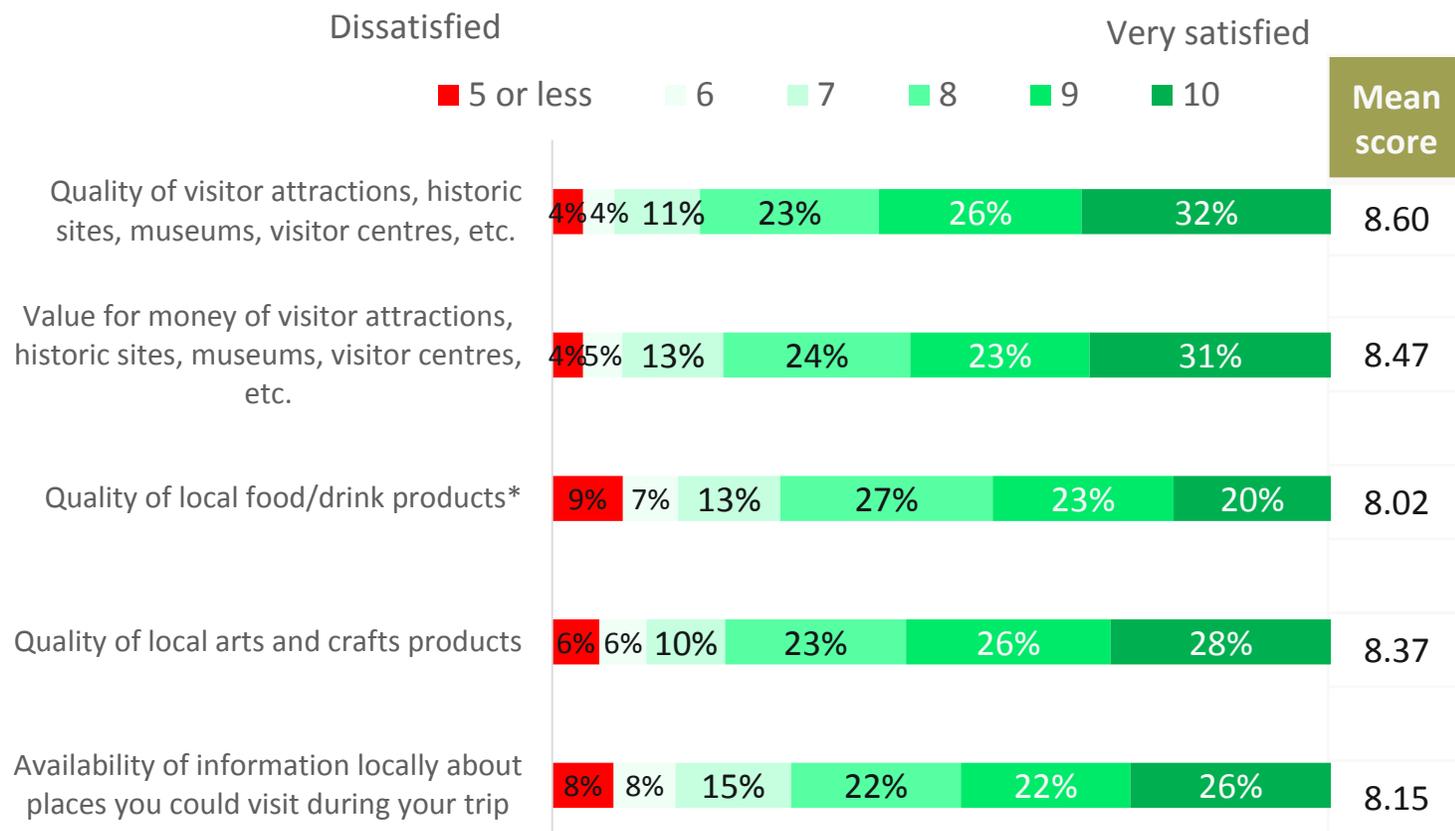
Q68: Thinking about the accommodation you stayed in, how satisfied were you with the following aspects of your accommodation?

# Trip evaluation

## Satisfaction with aspects of trip

- The majority of visitors were satisfied with all aspects of their trip to Shetland. All of the aspects listed opposite attracted mean scores of over 8 out of 10 in terms of satisfaction.
- The highest scoring element was the quality of visitor attractions, historic sites, museums, etc. – 59% of visitors scored this with 9 or 10 out of 10. These attractions were also thought to offer good value for money.
- The quality of local arts/crafts products were also highly regarded by most visitors – more than half (54%) gave top scores of 9 or 10.
- Information provision locally was also praised, with a mean score of 8.15 across the sample.

## Satisfaction with key aspects of trip



\*Includes business visitors.

Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

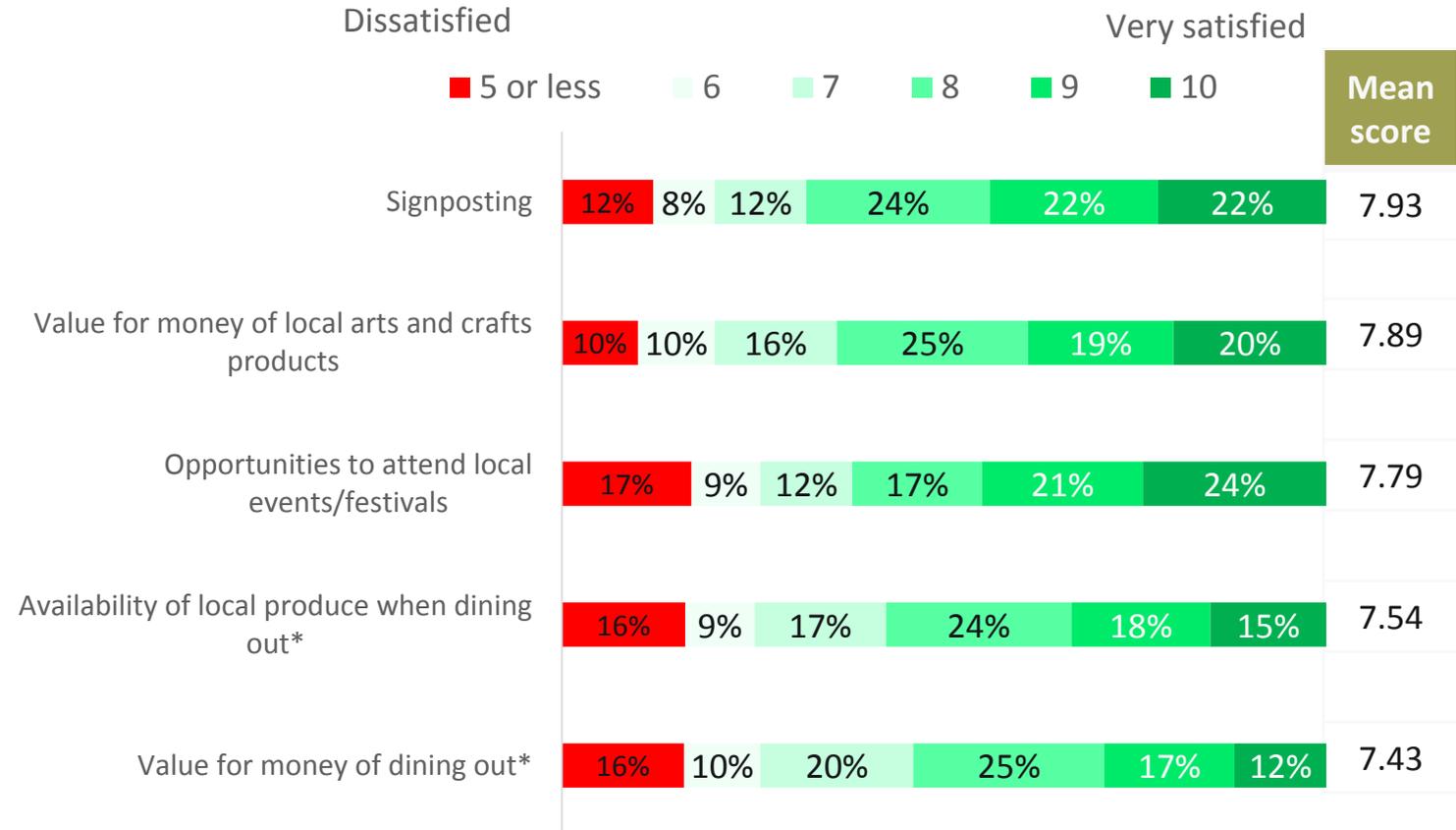
Base (All, excluding 'don't know'): 526– 720

# Trip evaluation

## Satisfaction with aspects of trip

- The aspects detailed here attracted slightly lower scores than the previous chart, however, the assessment of each remains very positive – all score more than 7 out of 10 on average.
- One of the lowest scores was for opportunities to attend local events and festivals – although this opportunity would clearly be limited by whether any events were on at the time of the visit.
- The value for money of dining out was also scored slightly lower compared to some other aspects, suggesting that, for some, eating out was expensive (16% score it 5 or less).

## Satisfaction with key aspects of trip



\*Includes business visitors.

Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

Base (All, excluding 'don't know'): 371 - 718

# Trip evaluation

## Satisfaction with aspects of trip – sub-sample analysis



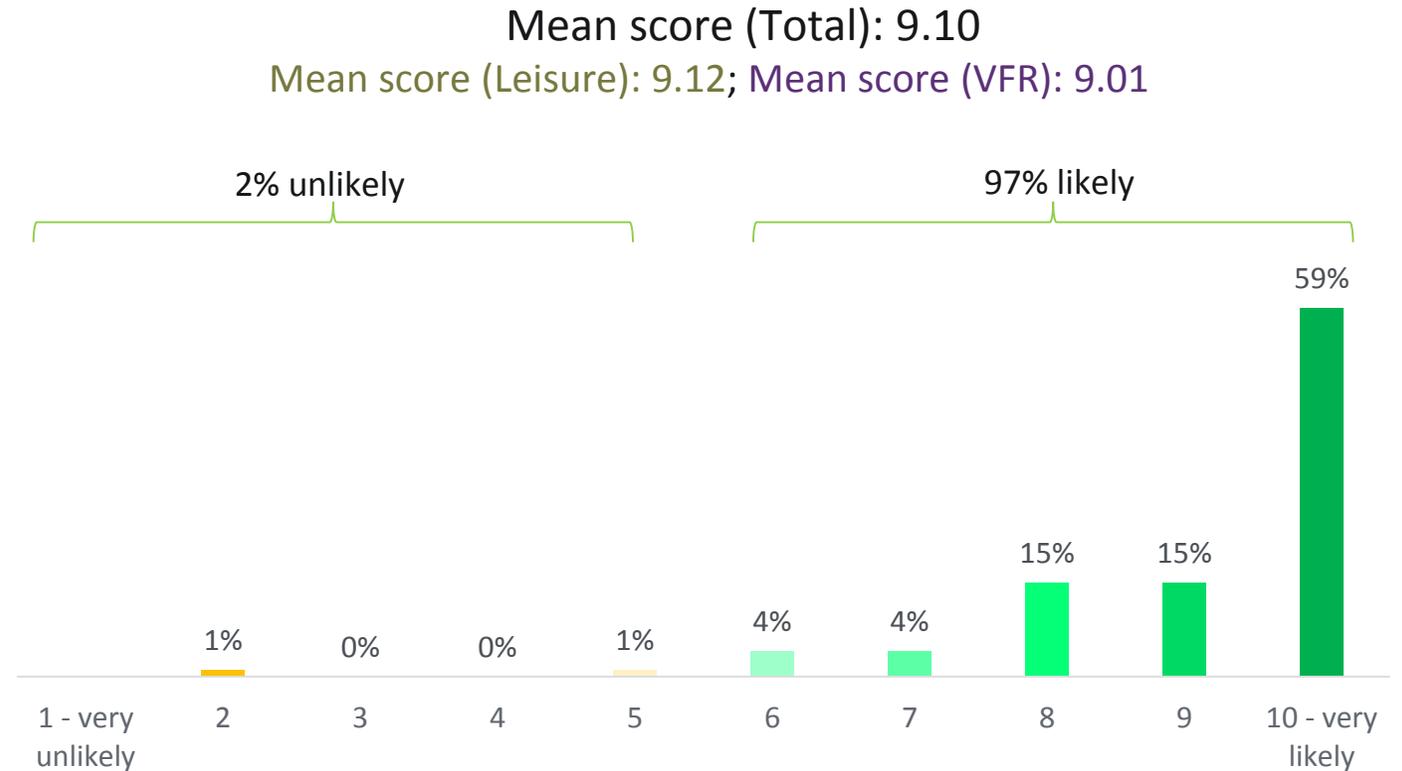
- Amongst Leisure visitors, those from North America tended to provide the highest scores, whilst those from elsewhere tended to provide lower scores – although the majority were satisfied.
- Female respondents tended to state slightly higher levels of satisfaction than males. In particular, they were more likely to be satisfied with the quality of visitor attractions and quality and value for money of local arts and crafts.

# Trip evaluation

## Recommendation

- The positive attitudes of Leisure and VFR visitors is confirmed in the finding that the majority would recommend Shetland as a holiday or short break destination. Indeed, 59% gave a perfect 10 out of 10 promotion score.
- Findings were similarly positive for both Leisure and VFR visitors.
- There were no significant differences by origin or demographics.

Likelihood to recommend Shetland as a holiday or short break destination – Leisure and VFR visitors



Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

Base (All Leisure/ VFR, excluding 'don't know'): 652

Q70: Based on your experiences during this trip, how likely are you to recommend Shetland as a holiday or short break destination to friends and family?

# Trip evaluation

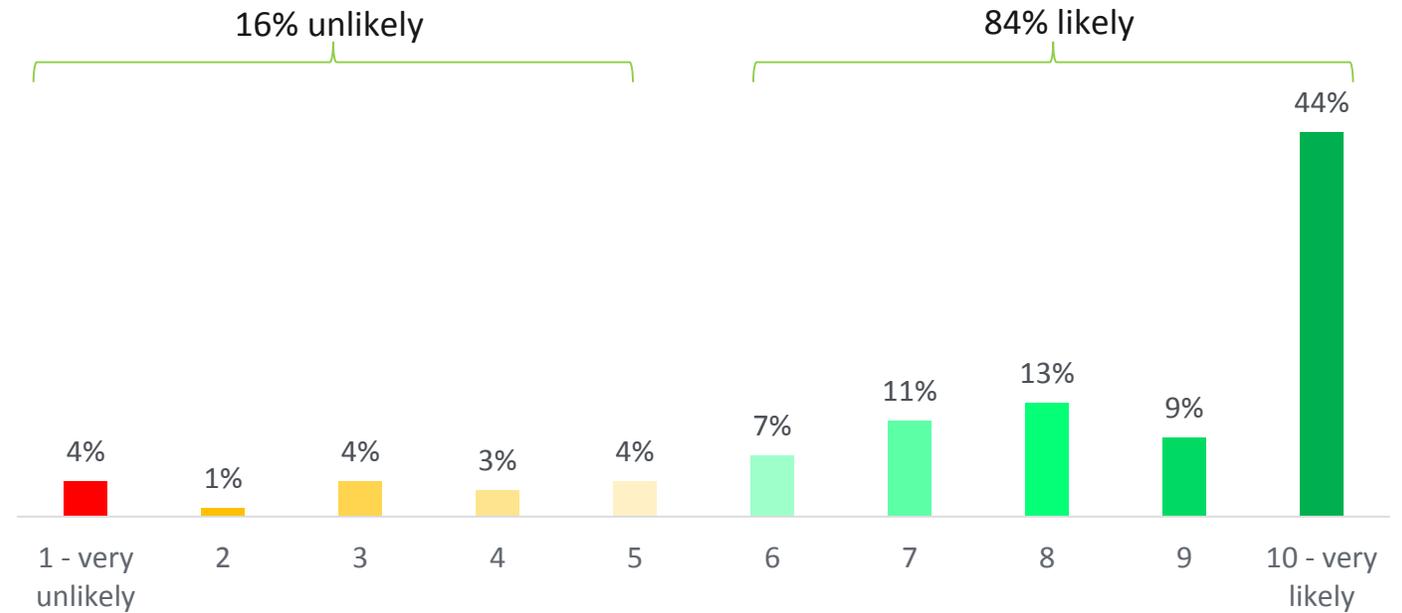
## Return visit

- When asked how likely they were to return to Shetland for a short break or holiday in the next 5 years, the majority of visitors responded positively - 84% scored 6 or more out of 10, with 44% scoring 10 out of 10 indicating that it is highly likely.
- Findings did vary by visitor type. As expected VFR visitors were the most likely to anticipate a return visit (70% 10 out of 10). A large proportion of Business visitors also considered it likely – 79% scored 6 or more and 36% scored 10.
- Given the mix of domestic and international visitors within the Leisure sample it is not surprising that propensity to return is slightly lower. Nonetheless, this group was also strongly weighted to an intention to return, as noted in the data detailed over.

## Likelihood to visit Shetland on holiday or short break in next 5 years



Mean score (Total): 7.93  
Leisure: 7.92; VFR: 9.12; Business 7.54



Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

Base (All excluding 'don't know'): 812

# Trip evaluation

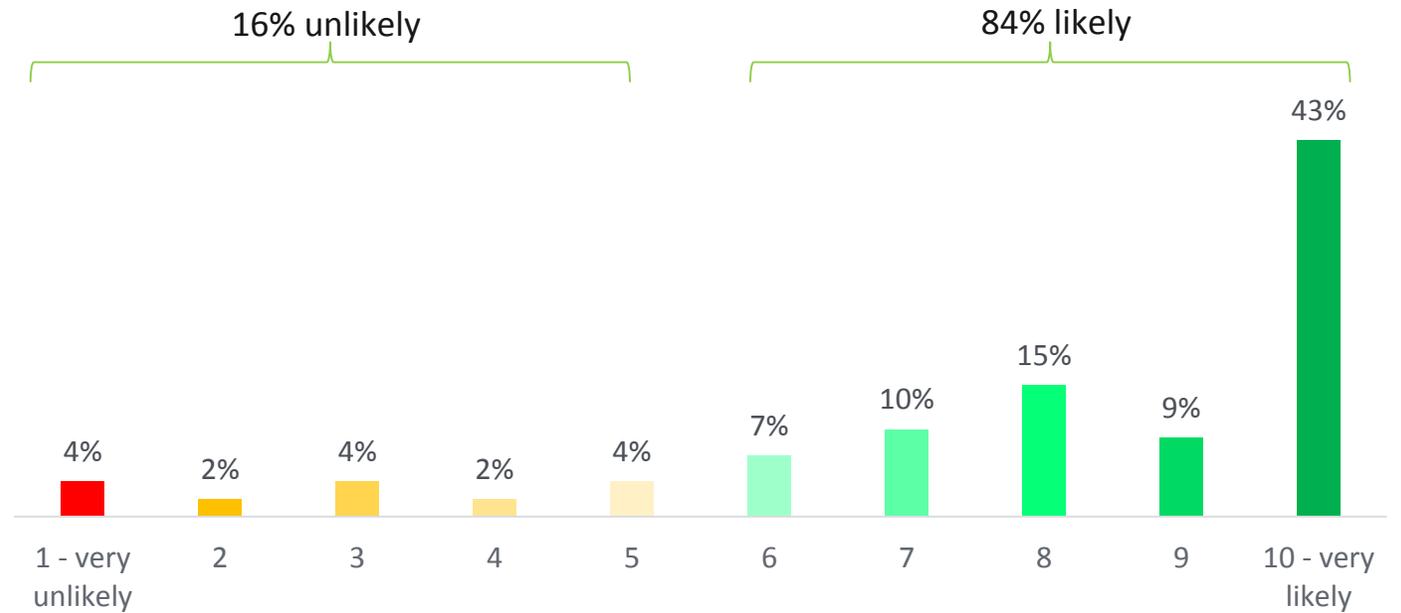
## Return visit

- 84% of Leisure visitors gave a score of 6 or more in terms of their likelihood to return to Shetland in the next five years, with 43% giving a score of 10 out of 10 indicating that it is highly likely .
- As we would expect, visitors from Scotland (59%) and the rest of the UK (46%) were more likely to score 10 out of 10 than those from overseas (29%).
- Females Leisure visitors were slightly more likely to score 10 (47%) than males (38%). Those aged 35-44 were more likely to provide a score of 10 (60%) than other age groups.



## Likelihood to visit Shetland on holiday or short break in next 5 years – Leisure visitors

Mean score (Leisure): 7.92



Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

Base (All Leisure excluding 'don't know'): 526

# Trip evaluation

## Highlight

- When asked about the highlight of their trip the scenery and landscape in general was mentioned as well as specific places such as Sumburgh Head, Jarlshof and Mousa Broch.
- This was followed by almost a quarter mentioning a highlight was the wildlife, such as the puffins and otters and general birdwatching.

## Highlight of the visit (open-ended) – Leisure & VFR



Highlights - Open ended question grouped	%
Scenery / beauty / landscape / views	27%
Attraction / specific places e.g. Mousa Broch, Jarlshof, Sumburgh Head	27%
Wildlife	24%
Nice people/locals/community/host	18%
Visiting family / friends	15%
History / archaeology	8%
Walks	8%
Events e.g. Accordion and Fiddle Festival	6%
Peace / quiet / relaxation	6%
Good weather	5%
Beaches, lochs	4%
Food	4%
Ferry trip	3%
Fresh air	2%
Fishing	1%
Photography	1%
Plane trip	1%
Other - experience as a whole, general enjoyment	10%

# Trip evaluation

## Highlight

- Half of the business visitors said that it was the local community and people that they appreciated the most.
- This was closely followed by the views and scenery.
- A few mentioned other aspects that were a trip highlight, such as restaurants and food, and the peace and quiet.

## Highlight of the trip (open-ended) – Business visitors



Highlights - Open ended question grouped	%
Nice people / locals / community	50%
Scenery / beauty / landscape / views	37%
Peace / quiet / relaxation	13%
Food	12%
Attraction / specific places	10%
Doing business	9%
Wildlife	6%
Good roads	6%
Good weather	5%
History / archaeology	5%
Out of scope - negative comments	3%
Fresh air	2%
Hotel staff	2%
Event	2%
Exciting weather	2%
Friends / Family / Home	1%

# Trip evaluation

## Improvements

- When asked about suggested improvements 53% gave a response.
- There was no predominant suggested improvement; instead a number of individual improvements were given. Those that were mentioned the most were in relation to:
  - Improving signage on the roads
  - Improving signs to attractions and visitor centres
  - Improving public transport options
- In total, 15% mentioned an improvement relating to internet availability or mobile phone coverage.

## Suggested improvements (open-ended)



Suggested improvements - Open ended question grouped	%
Better signs to attractions and visitor centres / Better signs on the roads	16%
Travel improvements – better bus times, more public transport options, etc.	15%
Internet / telephone – poor wifi and mobile phone signal	15%
Bins and litter	10%
More things to do	10%
More shops / More opportunities to buy souvenirs	8%
More time	6%
Accommodation prices	6%
Large crowds	5%
Infrastructure / parking / roads	5%
Accommodation quality	5%
Public toilets	4%
Access / attractions not being open	3%
Opening hours / Sunday opening	3%
Flight / ferry prices	3%
Information	3%
Environmental concerns	3%
Campsites	2%
Midges	1%
Too busy / tourists / cruise ships	1%
Weather	1%
Keep unique identity	1%

# Qualitative Findings

## Improvements



The key improvements from qual respondents ...

*The craft trail was quite commercial. It was not what I expected.*

*I found that in Scotland in general the signage is bad.*

*Food , seafood (What with all the water!) should be much better!*

*There was less focus on local food. This is something we noticed that Orkney pushed but not such a focus on Shetland.*

*Trying to eat out was challenging as we only found one place that was reliably good in the evening.*

*The food in general fell short of my expectation as pubs selling food didn't always sell food as the kitchen was closed or something.*

*I travelled to the Northern most pub, only to find it wasn't open till 5pm. Signs leading there could have helped me not make such a long drive for nothing.*

*The time period between checking out the hotel and the ferry leaving meant we had our luggage with us so couldn't do much for that day which was a bit of a waste – I would have paid for a left luggage place to take the stress away rather than worry about it*

# Trip evaluation

## Negative Experience

- Only 19% of respondents made a comment when asked to state if anything had negatively impacted their experience.
- Similar to the suggested improvements transport was one of the main aspects that impacted negatively on visitors' experiences, for example:
  - Delayed flights/ferries or missed ferry
  - Lack of bus service / poor Sunday bus service
- Other issues included price and quality of accommodation along with individual incidents experienced with staff members or local businesses

## Negative experience during the visit (open-ended)



Negative experience - Open ended question grouped	%
Transport options / poor quality of transport / missed ferry	19%
Weather	14%
Price of accommodation / poor quality of accommodation	11%
Local business (bad experience at)	9%
Litter	8%
Lack of Food / drink / restaurant / café options	8%
People e.g. specific incident with staff members / customer experience	6%
Lack of internet / telephone coverage	4%
Information (lack of)	4%
Opening hours / Sunday opening	4%
Ugly buildings, shops closed down	3%
Drivers	3%
Parking	2%
Transport costs	2%
Prices	2%
Environment	2%
Access / attractions not open (season)	1%
Busy / tourists / cruise ships	1%
Midges	1%
Noise	1%
Road works	1%
Hard to book	1%
Signs (lack of)	1%
Attraction issues	1%
Couldn't get fuel	1%
Roads / paths	1%
Other individual comments	10%

# Trip evaluation

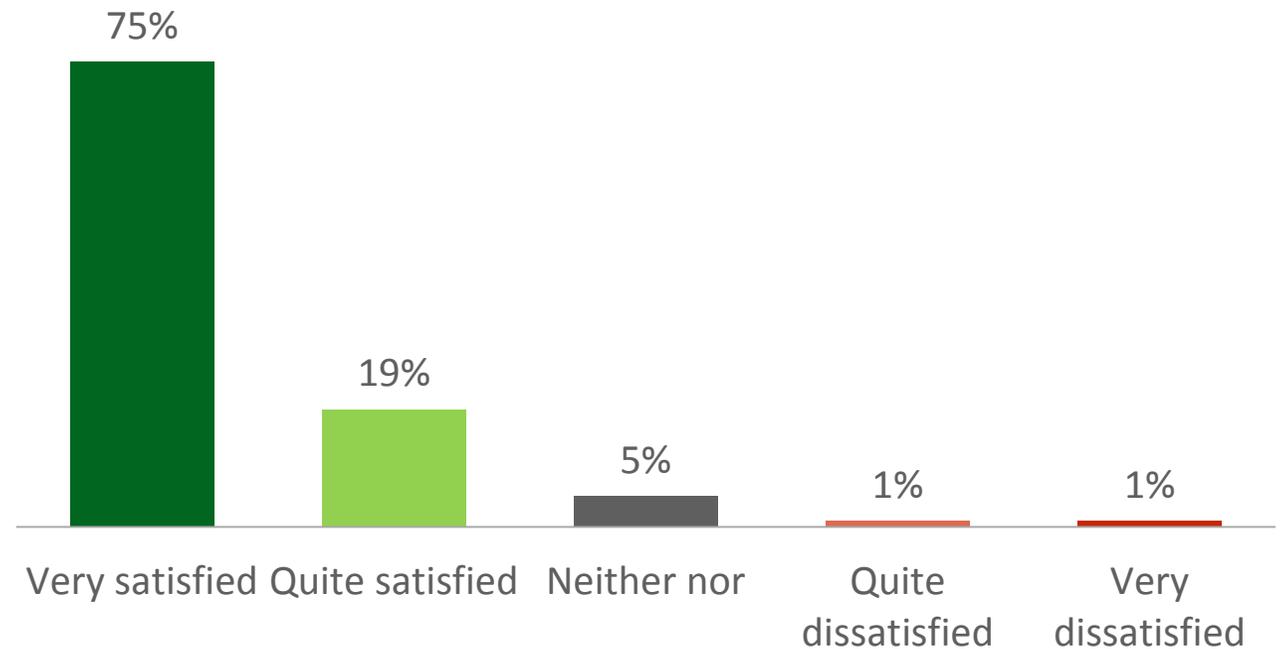
## Overall satisfaction

- The positive opinions of visitors to Shetland were confirmed when they were asked to rate their overall satisfaction with their trip to Shetland. In total, 94% reported being satisfied, with 75% stating that they were 'very satisfied'.
- This high level of satisfaction was reflected across all visitor types, however, Leisure visitors had the highest proportion of 'very satisfied' responses, as detailed over.

Overall, how satisfied were with your trip to Shetland?



Mean score: 4.68



Mean score calculated, whereby 1 is extremely dissatisfied and 5 is extremely satisfied.

Base (All): 854

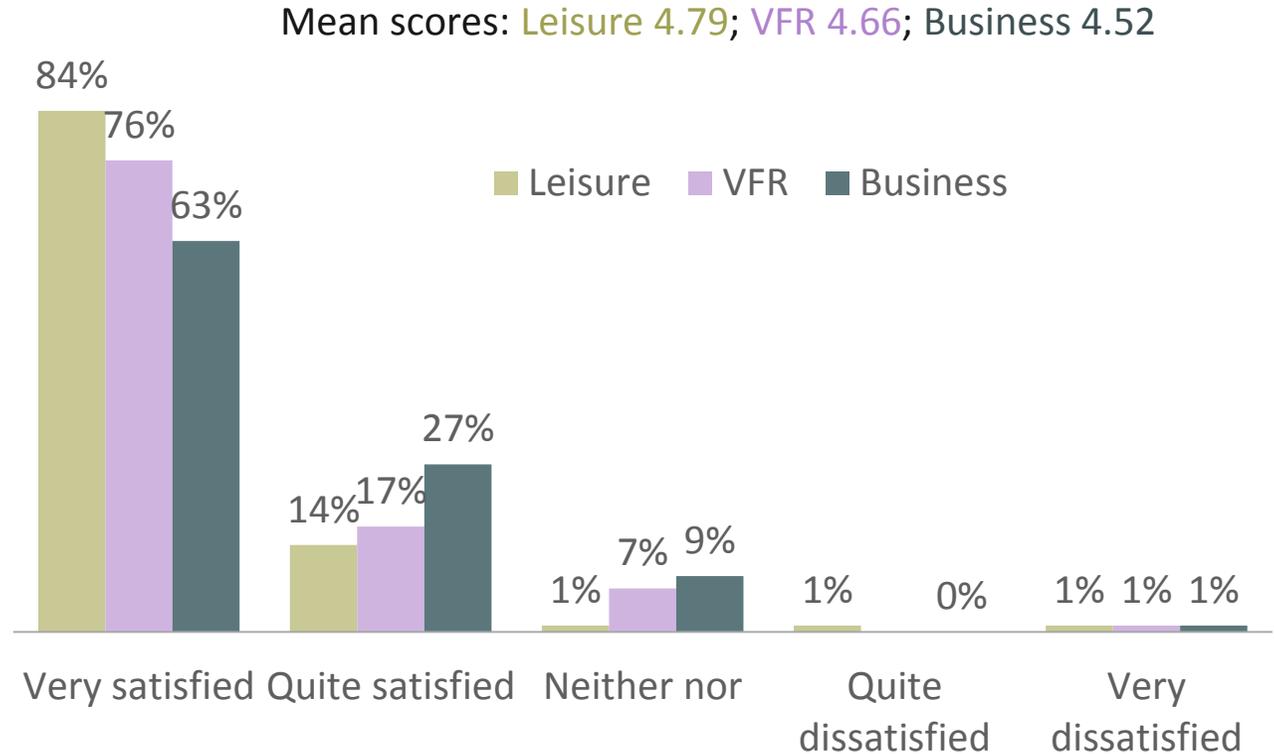
# Trip evaluation

## Overall satisfaction

- Leisure visitors (84%) were the most likely to state that they were 'very satisfied' with their trip, while Business visitors (27%) were more likely than others to state 'quite satisfied'.
- However, all three visitor groups expressed similarly high levels of overall satisfaction.
- The high levels of overall satisfaction were generally consistent across country of origin for Leisure visitors
- Likewise, high levels of satisfaction were reported consistently all age groups.



Overall, how satisfied were with your trip to Shetland?



Mean score calculated, whereby 1 is extremely dissatisfied and 5 is extremely satisfied.

Base (All): Total 854; Leisure 551; VFR 105; Business 198

# Qualitative Findings

## Overall Experience



The qualitative respondents were also very positive about their experience

*I have recommended it to half a dozen people*

*Amazing views!!*

*The scenery was stunning. Absolutely loved it!*

*Going to the furthest point in Great Britain was an absolute highlight*

*I loved the mood of the Island, not an emotional mood but a geological one. All dark and broody*

*Would definitely recommend the Shetlands to anyone*

*It was just really good. I was looking for a break away from work and computers and the pipe band, which is mental the now... I wanted a break away and for that it was perfect and no one can bug your happiness*

# Trip evaluation

## Summary



- Satisfaction with the experience of visiting Shetland was very high.
  - 66% agreed it was one of the best holidays they had ever taken
  - 75% were 'very satisfied' overall
  - 74% scored 9 or 10 in terms of their likelihood to recommend Shetland as a place to visit
- Interactions with local people were a particular highlight for many visitors – most agreed they were made to feel welcome, the local people really added to their trip and they experienced excellent customer service.
- Although the majority were first time visitors to the islands, many expressed an intention to make a return visit to Shetland – 67% of Leisure visitors provided a score of 8 or more out of 10 for intention to revisit in the next 5 years; and 62% of Leisure/VFR visitors agreed strongly that Shetland is a destination worth visiting more than once.
- The main area of minority concern was digital coverage, including availability of free Wi-Fi, mobile phone signal coverage and availability of 3G/4G.
- Open-ended analysis also suggests that some visitors experienced difficulties with transport and would like to see signage improved.



# Volume and value

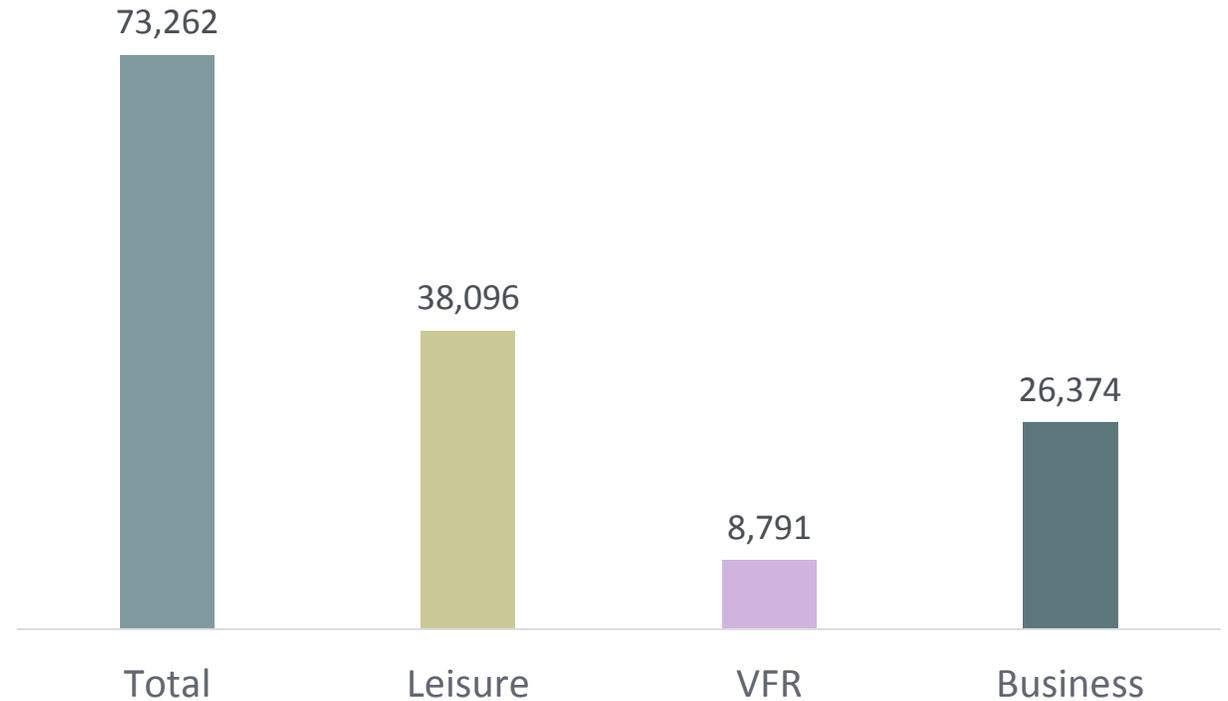
# Volume and value

## Visit numbers

- Total departing passenger numbers for 2017 were provided by travel operators.
- These figures were used to calculate the total number of visits\* to Shetland based on the proportion of visitors (versus islanders) measured by the calibration survey – 48%.
- The total number of visits to Shetland in 2017 was 73,262.
- Proportions for Leisure, VFR and Business visits measured by calibration survey were also applied to calculate the number of visits in each of these categories.

\*Figures are shown for the number of 'visits' to the islands, rather than the number of 'visitors'. This is because some visitors may make more than one trip over the course of the year. This means that we cannot estimate the number of discrete visitors but can provide estimated data on the number of visits.

## Numbers of visits to Shetland Islands in 2017

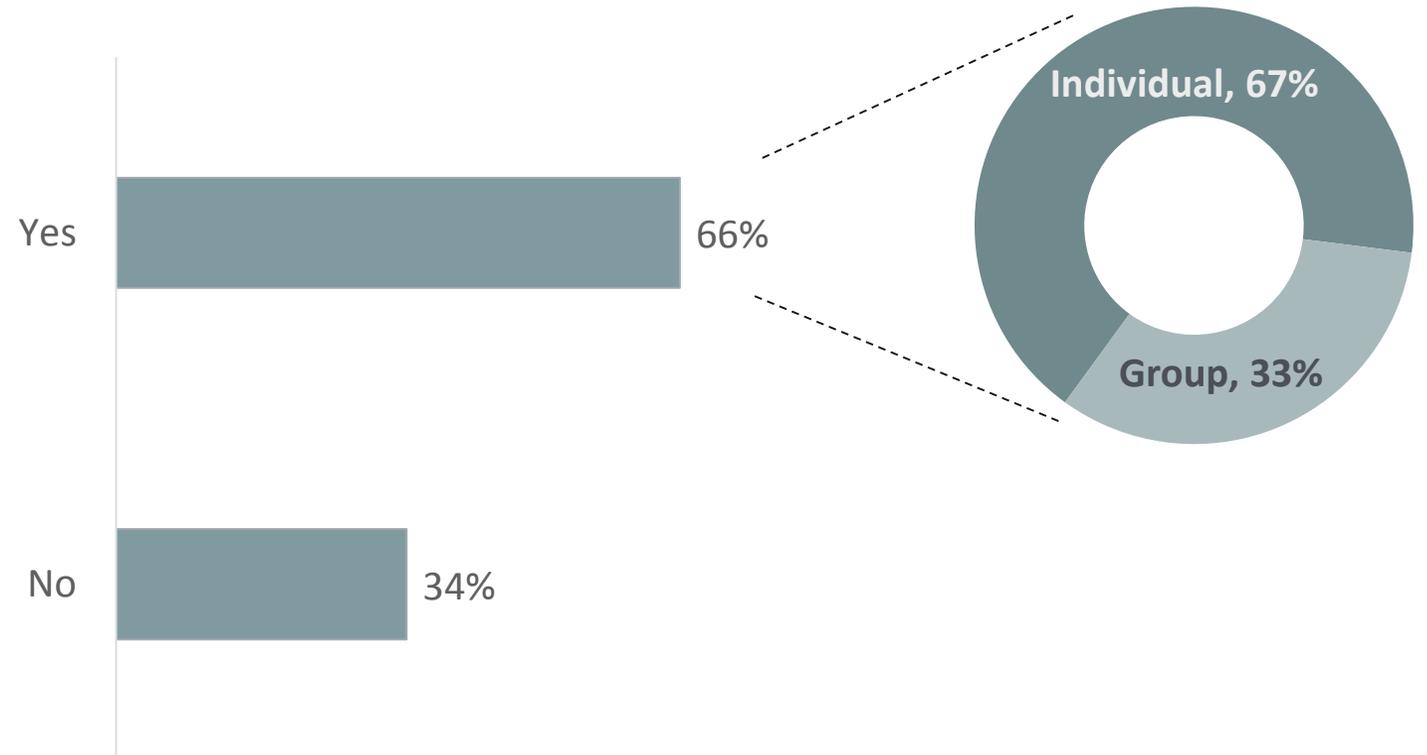


# Volume and value

## Provision of spend data

- In total, 76% of respondents to the online survey were able to provide spend data on their trip. All subsequent spend questions and overall value calculations are based on the data provided by these respondents.
- Approximately two thirds of respondents provided individual spend figures and one third provided group spend. All group spend data was divided by the number of people in the group to give 'spend per person'.

Are you able to provide approximate spend for different elements of your trip?



Q40: Firstly, is it easier for you to provide your own individual spend for the trip or the total spend for your group?

Base (All): 854

# Volume and value

## Average spend

- The data tabulated opposite shows the total average spend per person for their trip, as well as the overall average spend in each spend category. These averages are based on the total sample who provided spend data and therefore provide an indication of the average spend across all visitors.
- The highest category of spend was travel from the Scottish mainland (£141.31) followed by accommodation (£119.01).
- The overall average spend per person was £525.45. This figure includes travel expenditure to get to Shetland and full package costs, and does not therefore give the total spend per person on the Shetland Islands. This data is detailed over.

## Average total spend for trip – all visitors



Total average spend per person - £525.45



Base (All who provided spend data): 582

# Volume and value

## Average spend

- The total average spend per person on the Shetland Islands was £316.99.
- This figure excludes travel to the Shetland Islands from the Scottish mainland or from outside Scotland. The cost of a package holiday has also been adjusted to reflect estimated spend accruing to businesses on Shetland.
- Visitors from the rest of the UK (£366.93) and overseas (£351.64) had higher average spends than those from Scotland (£261.78).
- Leisure visitors tended to spend more on their trip than VFR and Business visitors. The average trip spend by visitor type is detailed over.

## Average spend on Shetland Islands – all visitors



Total average spend per person on Shetland Islands - £316.99



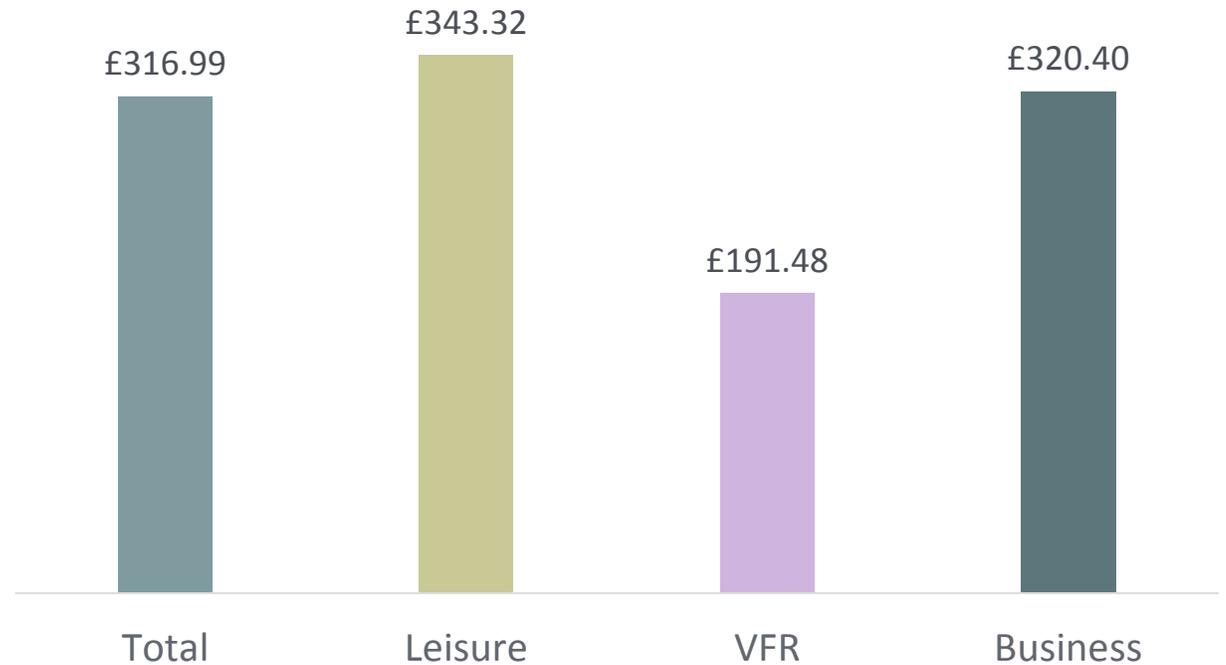
Base (All who provided spend data): 958

# Volume and value

## Average spend

- Leisure visitors had the highest average spend per person per trip at £343.32.
- The average spend for Business visitors on the Shetland Islands was only slightly lower at £320.40.
- VFR visitors has the lowest average trip spend - £191.48
- The average spend for a Leisure overnight visitor was £349.13.

## Average spend on Shetland Islands – by visitor type



Base (All who provided spend data): Total 582; Leisure 404; VFR 74; Business 104

# Volume and value

## Total value

- Average spend figures have been applied to visitor volume in order to calculate the total value of visitors to Shetland in 2017.
- The total value of visitor spend on the Shetland Islands in 2017 was £23.2 million.
- The largest proportion of this spend came from Leisure visitors - £13.1 million.

## Total spend by visitors on Shetland Islands in 2017



	Number of visitors	Average spend	Total Spend
Leisure	38,096	£343.32	£13,079,187
VFR	8,791	£191.48	£1,683,383
Business	26,374	£320.40	£8,450,323
Total	73,262		<b>£23,212,893</b>

# Volume and value

## Total value

- The spend figures for Leisure visitors have been split by country of origin to calculate the total value of each visitor type.
- Visitors from the rest of the UK make up the largest proportion of Leisure visitors and also have the highest spend per person. These visitors therefore contribute the highest value to the islands, with a total spend of approximately £5.4 million.
- Overseas Leisure visitors (£354.08) have a similar average spend per person as rest of UK visitors (£379.76). These visitors have a value of around £4.5 million for the Shetland economy.
- Leisure visitors from Scotland tend to have a lower spend per person and contribute approximately £3.2 million.

## Total spend by Leisure visitors on Shetland Islands in 2017



	Number of visitors	Average spend	Total Spend
Scotland	11,429	£276.19	£3,156,537
Rest of UK	14,096	£379.76	£5,352,943
Overseas	12,572	£354.08	£4,451,404
<b>Total Leisure</b>	<b>38,096</b>	<b>£343.32</b>	<b>£13,079,187</b>

Base (All who provided spend data): Total Leisure 404;  
Scotland 100; rest of UK 153; overseas 151

\*Total spend figures by origin do not add exactly to total Leisure spend. This is due to rounding and weighting.

# Volume and value

## Spend categories

- The majority of visitors spent across a range of categories, including travel, food and drink, accommodation, entertainment and shopping.
- As we would expect, the highest proportions of visitors spent on food and drink and travel to Shetland.
- Leisure visitors were more likely to spend on shopping for gifts and souvenirs (77%) than VFR (64%) or Business (33%) visitors.
- Leisure visitors were also more likely to mention spend on entertainment/recreation (62%) than VFR (42%) or Business (14%) visitors.

## Proportions providing spend data in each category – all visitors



Base (All able to provide spend): 576

# Volume and value

## Average spend

- In order to show a more accurate value for how much people spent in each category, the figures opposite are only based on those respondents who provided spend figures in each category, i.e. the averages exclude zeros.
- Therefore, for people who travelled directly to Shetland from a location outside of Scotland (e.g. Bergen) the average cost of travel was £178.59. Travel from the Scottish mainland costs around £169.35 per person on average.
- The average cost of accommodation for people staying in paid for accommodations was £163.46, whilst the additional costs of food and drink on the trip averaged £60.14 for those who incurred these costs.
- Of those who purchased gifts and souvenirs, the average amount spent on the trip was £43.83 per person.

## Average spend in each category – only those spending in each category

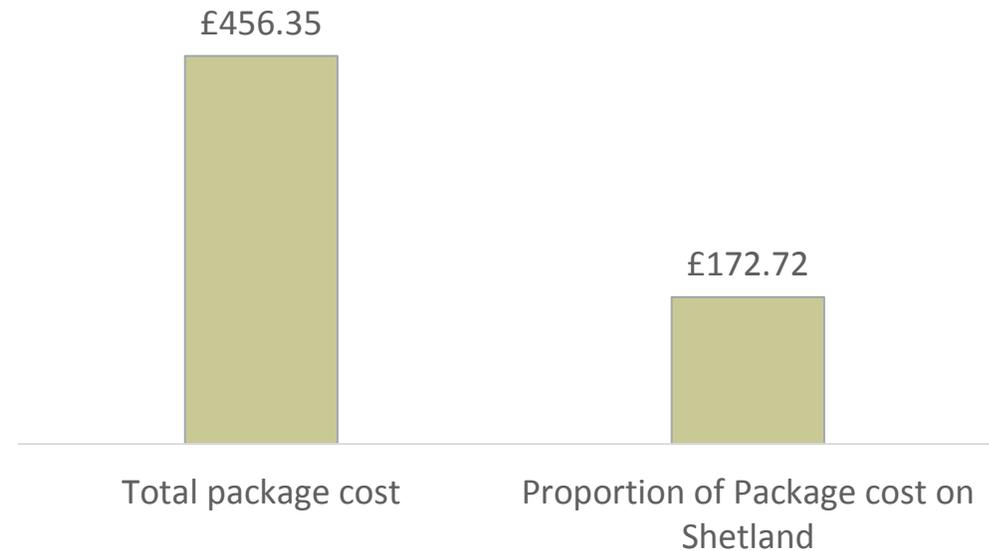


Base (All able to provide spend in each category): 160 - 504

# Volume and value Visitors on a package

- 7% of Leisure visitors booked their trip as a package.
- Of those able to provide trip spend, 55% reported that their package included only time spent in Shetland, while 45% reported that it included nights elsewhere.
- The value of the package which was estimated to accrue to businesses on Shetland was calculated on the basis of:
  - Proportion of total length of trip spent on Shetland
  - Proportionate amount of time spent on Shetland divided by 2.
- The assumption that approximately half of the package spend will accrue to Shetland businesses is used to provide consistency with previous value calculations in 2013, 2009 and 2005.

## Average cost of a package trip - Leisure visitors



Base (All Leisure visitors on a package who were able to provide spend): 46





# Comparisons to previous research

# Comparisons to previous research

## Notes on analysis



- Due to changes in method and question wording, there is limited scope for comparisons between 2017 and data gathered in previous waves of research – 2013, 2009 and 2005.
- Key differences between the surveys are noted in this section. It is important to note, however, that some data which was collected via the online survey in 2017 was collected via face-to-face surveys previously. The different methods of data collection can have an impact on findings, particularly for spontaneous questions.
- Furthermore, some questions were asked differently in previous years, or had different lists of response codes. Again these changes can impact on findings. In particular, the rating scales used to measure satisfaction with aspects of the visit, visit experience, likelihood to return and likelihood to recommend were different in 2017. This means that direct comparisons of these questions to 2013 is not possible.

# Comparisons to previous research

## Profile of visitors



### All visitors:

- A significantly higher proportion of visitors to Shetland in 2017 were Leisure visitors (51%) than in 2013 (35%). This finding indicates a reversal in a downward trend in the proportion of Leisure visitors to the islands, from 2000 when 46% of all visitors were Leisure visitors. The increased share of Leisure visitors has resulted in a corresponding decrease in the share of Business (35% in 2017; 42% in 2013) and VFR (11% in 2017; 20% in 2013) visitors. However, it is important to note that actual visitor numbers have increased over this period – from 64,655 in 2013 to 73,262 in 2017. As a result, actual numbers of business visitors have remained consistent (26,514 in 2013 and 26,374 in 2017). The increase has been predominantly in leisure visitors over this period – from 26,702 to 38,096, an increase of 43%.
- The gender profile of visitors remained consistent between 2013 and 2017. The age profile of all visitors was also very similar in 2017 to previous years, although in 2017 a higher proportion were in the 45 to 64 age group (46%, compared to 36% in 2013).
- The profile by country of origin was also broadly similar between 2013 and 2017; however, there has been an increase in overseas visitors from 19% in 2013 to 23% in 2017. The 2017 data is similar to 2006 when 24% of visitors were from overseas.
- The proportion of first time visitors to Shetland in 2017 (46%) was higher than 2013 (40%) but slightly lower than 2006 (51%).

### Leisure visitors:

- The gender profile of Leisure visitors was similar between 2013 and 2017. In 2017 there was a higher proportion of Leisure visitors aged 45 to 64 (43%) than in 2013 (31%); and a lower proportion of under 35 year olds (2017 18%; 2013 29%).
- Their profile by country of origin for Leisure visitors was very similar in 2017 to 2013.

# Comparisons to previous research

## Visitor journey, trip profile, overall satisfaction



- A slightly higher proportion of visitors to Shetland in 2017 planned their visit more than 6 months in advance (24%) than in 2013 (18%). Similarly, more visitors booked their trip more than 3 months in advance in 2017 (41%) than in 2013 (34%).
- In terms of sources of information used during the planning process, Leisure visitors were less likely to report using printed materials in 2017, such as brochures (2013 41%; 2017 11%) and guidebooks (2013 44%; 2017 23%).
- Comparing sources of information used during their visit to Shetland, Leisure visitors in 2017 were more likely to mention social media (2013 6%; 2017 13%). Leisure visitors were less likely to mention guide books (2013 31%; 2017 19%) and talking to proprietors/staff (2013 28%; 2017 19%).
- Overall levels of engagement with social media amongst Leisure visitors was similar in 2017 (48%) as in 2013 (42%). The proportions uploading photos to the internet and updating Facebook were also very similar between the two survey periods.
- More people reported using a hire car as their main form of transport in 2017 (39%; 29% in 2013) and fewer used a private car (31%; 38% in 2013).
- The types of accommodation cited by Leisure visitors were consistent between 2013 and 2017.
- A similarly high proportion of visitors in 2017 stated that they had been 'very satisfied' with their visit to Shetland (75%) as did so in 2013 (79%). Slightly fewer Leisure visitors were 'very satisfied' in 2017 (84%) than in 2013 (91%). It is important to note, however, that this question was asked as part of the face-to-face survey in 2013 and in the online survey in 2017. Respondents are more likely to provide a positive response when asked this type of question face-to-face when still on the islands.

# Comparisons to previous research

## Volume and value



- The data provided by travel operators for passenger numbers in 2017 indicate that there has been an increase in the number of visitors since 2013. The total visitors estimated in 2013 was 64,655, compared to 73,262 in 2017 – an increase of 13%. The increase was particularly high for Leisure visitors; a rise of 43% from 26,702 in 2013 to 38,096 in 2017. The numbers of VFR visitors have actually decreased over this time – from 11,412 in 2013 to 8791 in 2017.
- The average spend per person per trip on Shetland also increased between 2013 and 2017. In 2013 visitors spent £251 on average on their trip, whereas in 2017 the average spend was £317.
- Both of these factors have resulted in a significant increase in the total value of visitors to the Shetland economy. This figure has increased from £16.2 million in 2013 to £23.2 million in 2017.



# Final summary and conclusions

# Summary and conclusions

## Visitor profile



- This research has been conducted to ensure that Shetland Islands Council and its partners have relevant, accurate and up-to-date data to guide strategic planning to maximise the value of tourism for the Shetland economy in a sustainable way, and ensure that visitors have an excellent experience on the islands.
- Around half of visitors to Shetland in 2017 were on a holiday/leisure trip, while 35% were business/work visitors and 11% had travelled to the islands to visit friends or relatives. Notably, nearly a fifth of all the business visitors were in the oil and gas industry.
- The islands attract Leisure visitors from all over the world, although the largest proportion come from Scotland (45%) or other parts of the UK (32%). Some 19% of all Leisure visitors were from Europe, with 8% from North America and 7% from other overseas countries (predominantly from Australia and New Zealand).
- Business and VFR visitors were predominantly from Scotland.
- The gender profile of Leisure visitors was slightly skewed to females (52%), and the age profile tended to be older (73% over 45 years old).
- Half of Leisure visitors were on holiday with their partner or spouse (38% as a couple i.e. not travelling with anyone else), while just 7% of visitors had children in the party.
- Almost two thirds of Leisure visitors were visiting Shetland for the first time, while one third had visited before.

# Summary and conclusions

## Visitor journey



- The research has highlighted the key attributes associated with Shetland that influenced Leisure visitors to visit are the scenery and the history/culture.
- Inspiration came from a number of sources, with TV programmes such as the Shetland detective series, Coast, and an Island Parish being particularly important.
- Planning the trip tends to start at least 6 months before travel, with visitors researching using mainly online sources and talking with family and friends. This finding highlights the opportunity to use advocacy to spread the word and encourage people to visit the islands. Indeed, three quarters of visitors scored 9 or 10 out of 10 in terms of their propensity to recommend Shetland to others.
- After Google, Shetland.org, transport provider websites and VisitScotland were particularly well used by Leisure visitors during the planning process. A third of those who researched online also looked at traveller reviews and ratings.
- Booking of transport and accommodation tends to be done directly with providers, rather than via agents or other intermediaries.

# Summary and conclusions

## Trip profile



- Over 90% of all visitors stayed overnight on their trip to Shetland . The majority of overnight visitors (75%) stayed for a period of one week or less.
- Lerwick was the most popular area to visit – 92% of all visitors and almost all leisure visitors. Also popular were South Mainland and Central Mainland, over half of visitors went to these areas, rising to around three quarters for Leisure visitors. The main activities undertaken by Leisure visitors reflect their reasons for visiting Shetland – the majority mentioned visiting beaches, walking, birdwatching and shopping for local crafts and produce. Key minority interests include archaeology/geological sites, crafts and textiles, and sports. There may be an opportunity to attract younger visitors with focussed marketing of these activities on the Islands.
- Across all visitors, hotels was the most frequently mentioned type of accommodation (34%), followed by B&Bs (20%) and self-catering (19%). For Leisure visitors B&Bs (27%) and hotels (26%) were the most popular types of accommodations. Young Leisure visitors favoured more independent options: Homestay (e.g. Airbnb) at 14%, hostels (15%) and free camping (10%).
- Online sources of information were particularly important to Leisure visitors during their trip, although the majority also used printed materials, such as brochures and guidebooks, and visitor centres. Half of Leisure visitors actively engaged with online or social media activity during or after their trip – most commonly to upload photos and update their Facebook status.

# Summary and conclusions

## Evaluation of trip experience



- The vast majority of visitors to Shetland provided a very positive evaluation of their experience on the islands.
- The aspects of their trip which received the highest satisfaction scores were the quality and value for money of the visitor attractions. The quality of accommodation and friendly service was also widely regarded as very good.
- The key area for improvement was identified as the extent and quality of digital coverage (Wi-Fi, mobile phone signal, 3G/4G). Open-ended responses also suggested that signage could be improved and travel and transport options were restrictive for some.
- Encouragingly, many Leisure and VFR visitors agreed that there is more to Shetland than previously thought (73%) and that Shetland is worth visiting more than once (90%). Furthermore, two thirds of Leisure visitors rated their likelihood to return to Shetland with a score of 8 or more out of 10.
- Overall, 75% of all visitors, and 84% of Leisure visitors stated that they were 'very satisfied' with their trip to Shetland .



# Technical appendix

# Technical appendix

## Method and sampling



- The data was collected by face-to-face interviews (calibration) and an online survey.
- The target group for this research study was visitors to the Shetland Isles in 2017.
- The target sample size for the calibration interviews was 1,880 and the final achieved sample size was 2,434. The reason for the difference between these two samples was better than expected response rates at some sampling points.
- The target sample size for the online survey was 500 and the final achieved sample size was 854. The reason for the difference between these two samples was better than expected response rates for the calibration and online surveys.
- Fieldwork was undertaken between January and December 2017.
- Respondents were selected using probability random sampling, whereby interviewers selected every nth person passing their pre-selected sampling point.
- Respondents to internet self-completion studies are self-selecting and complete the survey without the assistance of a trained interviewer. This means that Progressive cannot strictly control sampling and in some cases, this can lead to findings skewed towards the views of those motivated to respond to the survey.
- The overall response rate to the survey was 46%.
- Due to the strict random sampling applied, the calibration data is representative of passengers at each sampling point. The data set was weighted to reflect the actual distribution of passengers across sampling points to ensure greater accuracy of results. The online data was skewed to Leisure visitors and was, therefore, weighted on the basis of visitor type and origin based on the calibration data.
- An incentive of 5 x £100 Amazon vouchers (prize draw competition) encouraged a positive response to the survey.
- In total, 6 interviewers worked on data collection.
- Each interviewer's work is validated as per the requirements of the international standard ISO 20252. Validation was achieved by re-contacting (by telephone or email) a minimum of 10% of the sample to check profiling details and to re-ask key questions from the survey. Where telephone details were not available re-contact may have been made by post. All interviewers working on the study were subject to validation of their work.

# Technical appendix

## Data processing and analysis



- The final data set was weighted to reflect:
  - Calibration – distribution of passengers across the sampling points (airports and ferry terminals)
  - Online – visitor type and origin (based on calibration data)
- The calibration sample base before weighting is 2,434 whilst the weighted sample base is 2,409.
- The overall calibration sample size of 2,434 provides a dataset with a margin of error of between  $\pm 0.39\%$  and  $\pm 1.95\%$ , calculated at the 95% confidence level (market research industry standard).
- The online sample base before weighting is 854, whilst the weighted sample base is 860.
- The overall online sample size of 854 provides a dataset with a margin of error of between  $\pm 0.66\%$  and  $\pm 3.33\%$ , calculated at the 95% confidence level (market research industry standard).
- Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.
- For **online surveys** these checks include:
  - Responses are checked for duplicates where unidentified responses have been permitted.
  - All responses are checked for completeness and sense.
  - Depending on the requirements of the survey, and using our analysis package SNAP, data is either imported from email responses received in a dedicated email inbox or stored directly on our dedicated server
- For **CAPI Questionnaires** these checks include:
  - Responses are checked to ensure that interviewer and location are identifiable. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact interviewers to check.
  - Using our analysis package SNAP, data received via over-the-air synchronisation is imported from our dedicated server.

# Technical appendix

## Data processing and analysis



- A computer edit of the data carried out prior to analysis involves both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
- Where “other” type questions are used, the responses to these are checked against the parent question for possible up-coding.
- Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
- A SNAP programme set up with the aim of providing the client with useable and comprehensive data. Crossbreaks are discussed with the client in order to ensure that all information needs are met.
- Data gathered using online surveys are validated using the following technique:
  - Internet surveys using lists use a password system to ensure that duplicate surveys are not submitted. The sample listing is also de-duplicated prior to the survey launch.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.