

progressive

Shetland Islands Visitor Survey 2017 Executive Summary

Shetland Islands Council and
VisitScotland



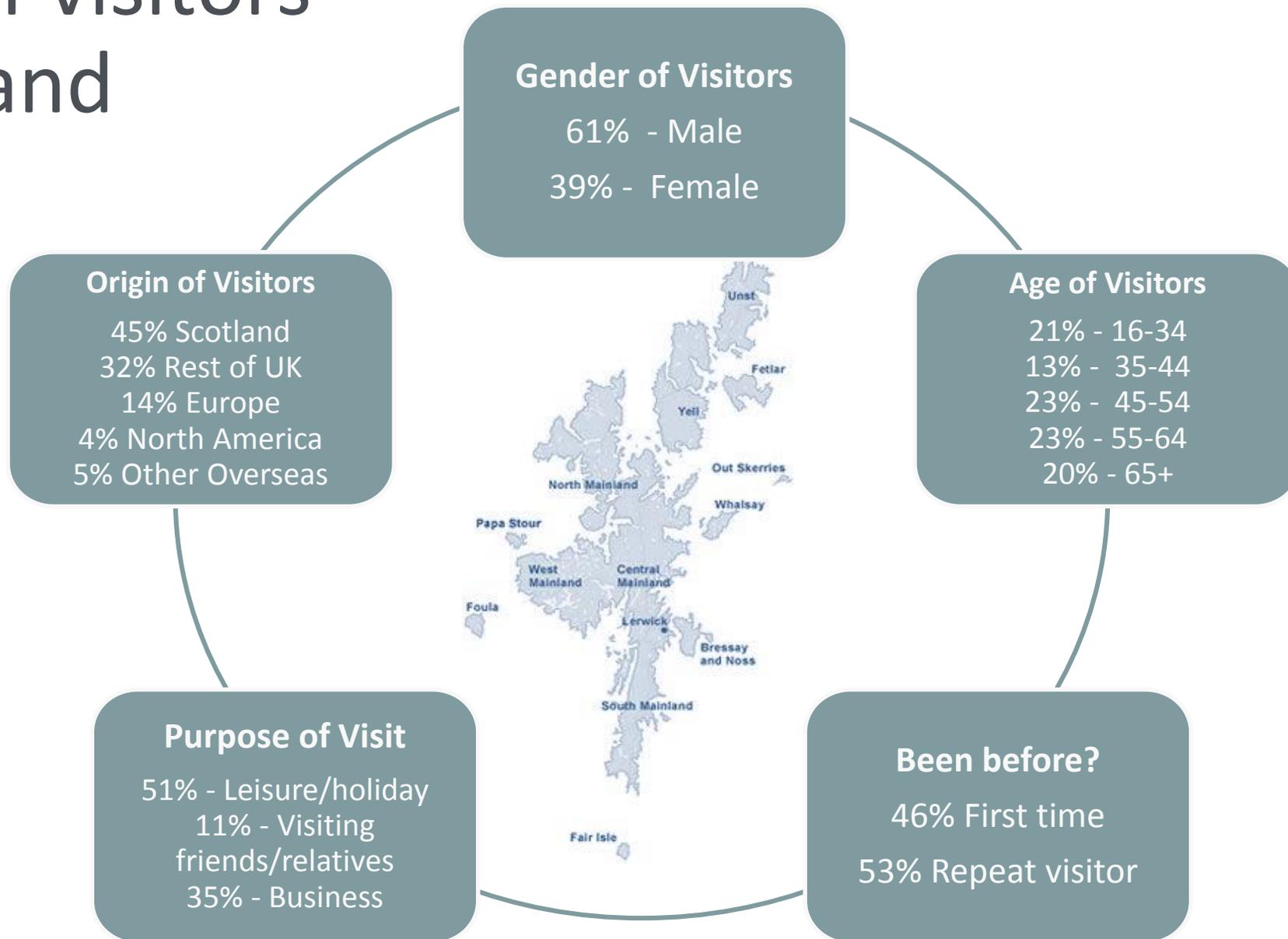
Shetland
Islands Council

Background and method



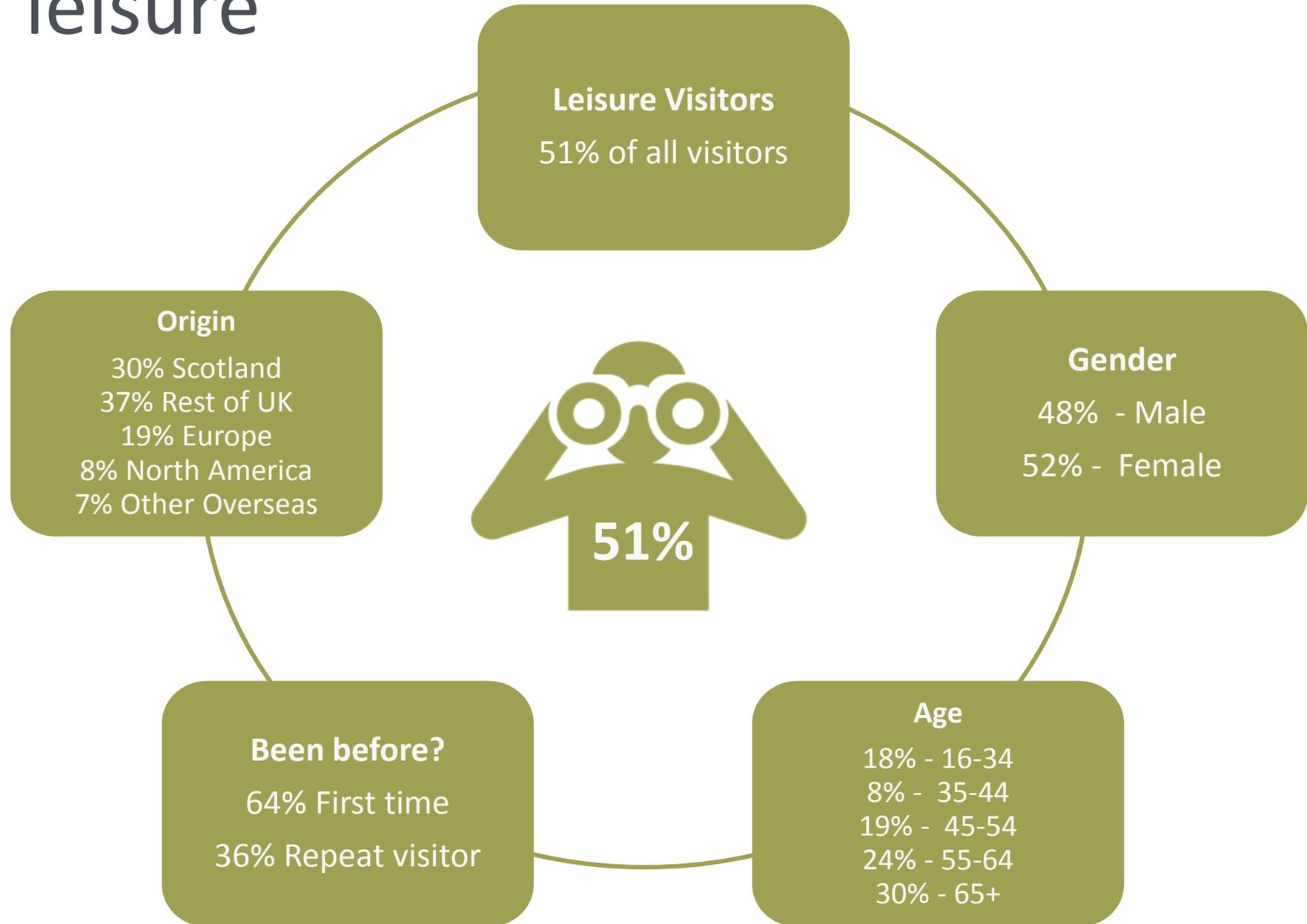
- Shetland Islands Council, in partnership with VisitScotland, commissioned Progressive to conduct a visitor survey on the Shetland Islands to provide robust and up-to-date estimates of visitor volume and value, as well as information on experiences, motivations, behaviours and perceptions.
- The research 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 terminals and airport
 - Stage 2 – Follow-up online survey to gather more detailed feedback
- Stage 1 - Calibration Interviews
 - 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.
 - In total, 1,839 online survey invites were sent.
 - The final sample response was 854 completed online surveys (46% response rate).
- Calibration data was weighted to reflect the distribution of passengers at each airport/ferry terminal. Online data was weighted to reflect the profile of the calibration survey in terms of country of origin and trip type.

Profile of visitors to Shetland

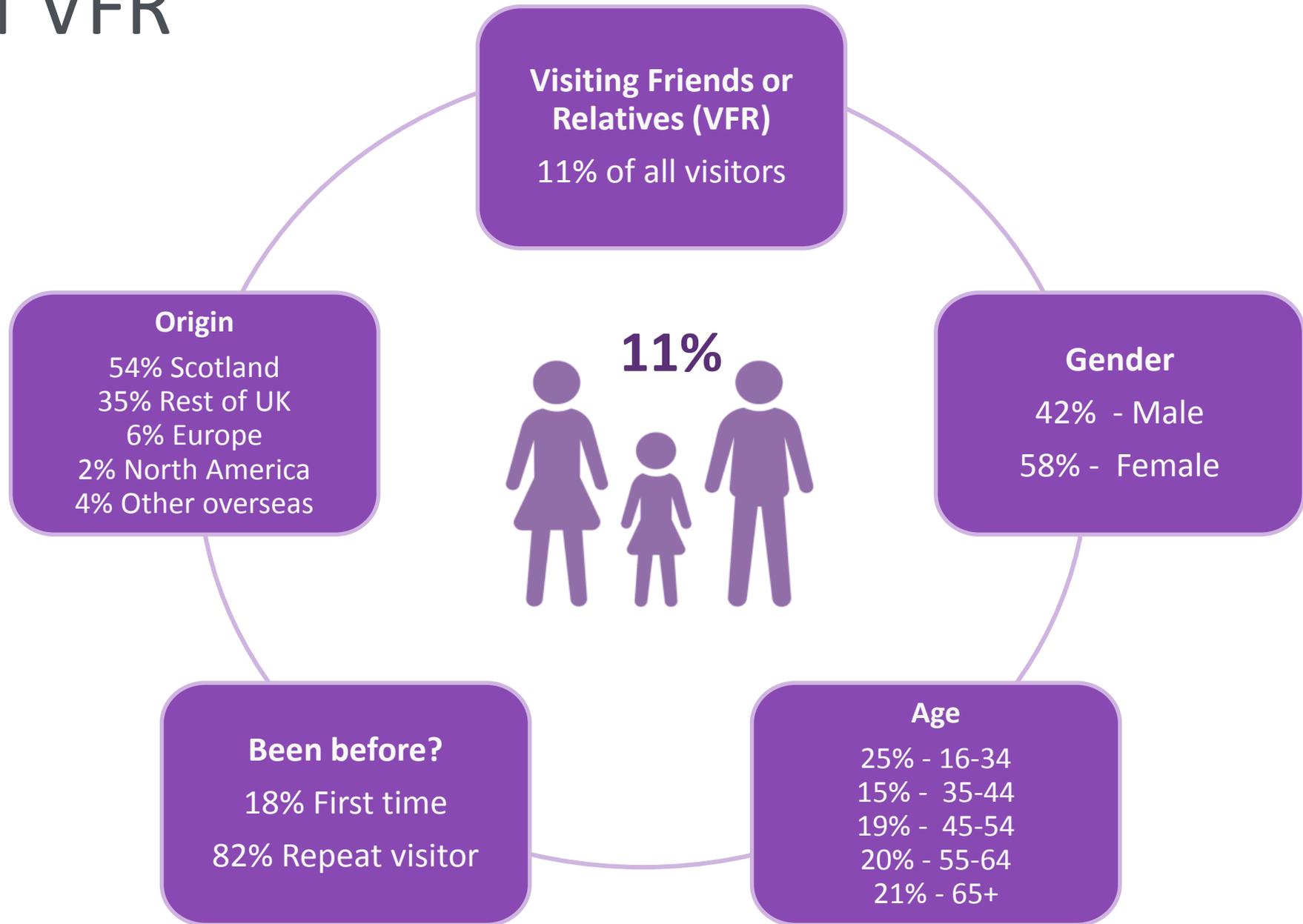


Base (Age, gender, origin, purpose): All calibration visitors – 2,434
Base (been before?): All online respondents – 825

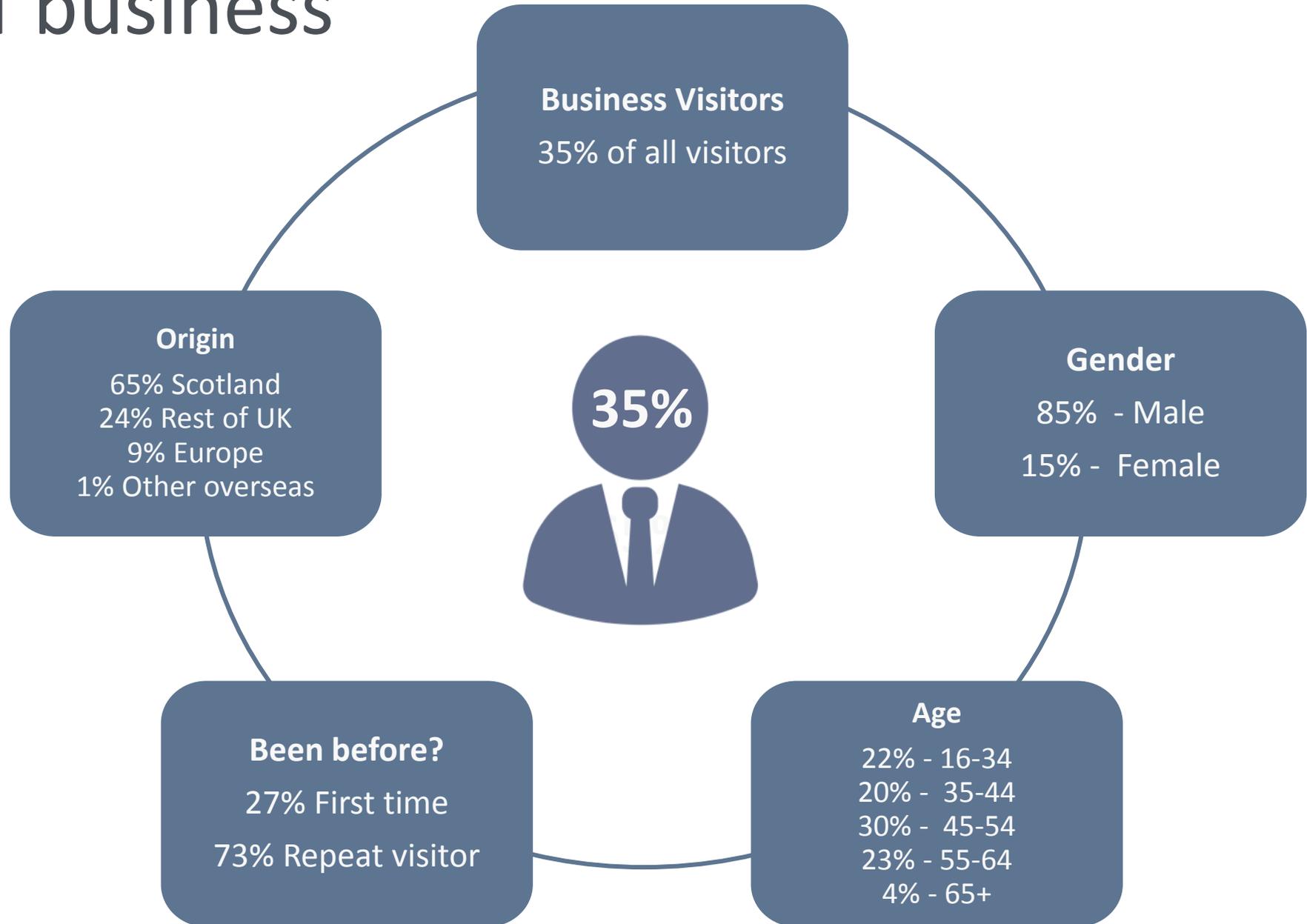
Profile of leisure visitors



Profile of VFR visitors



Profile of business visitors

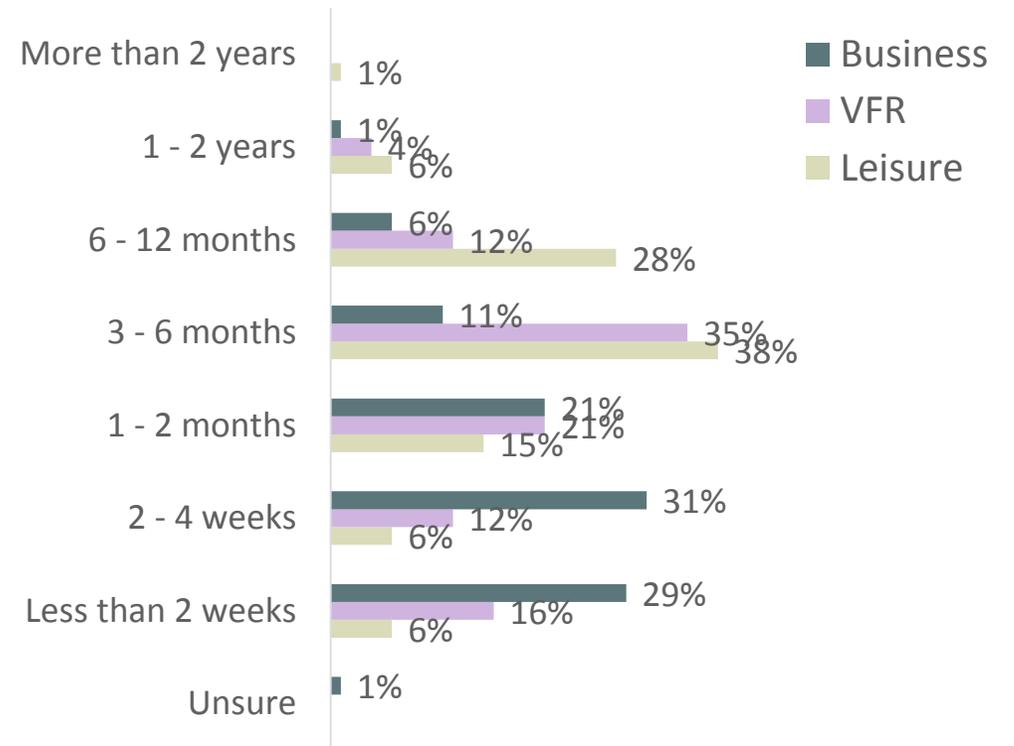
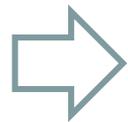
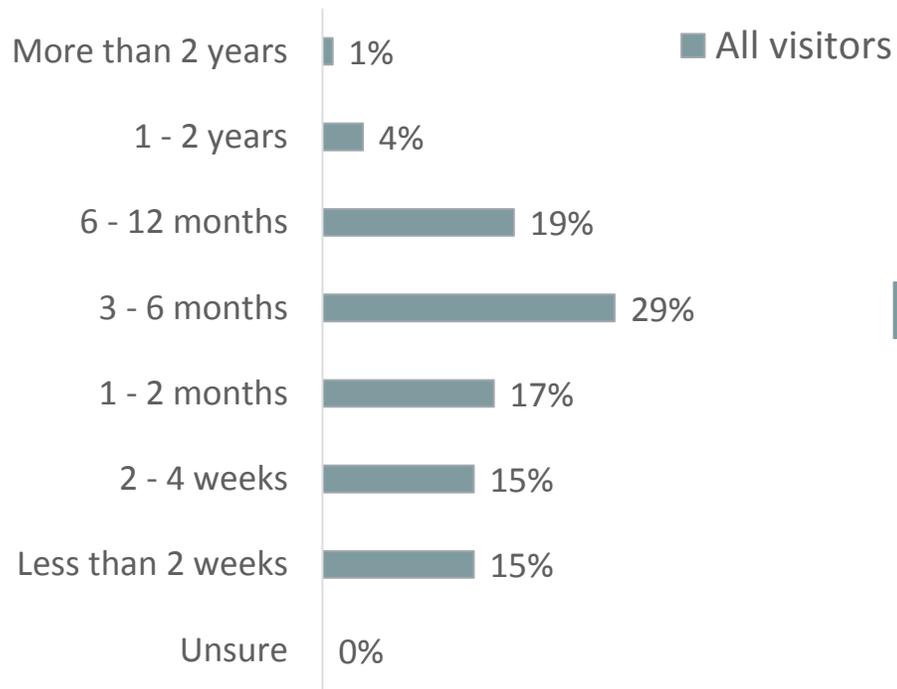


Planning a trip to Shetland



Planning the trip tends to start at least 3 months before travel. Leisure visitors are more inclined to plan further in advance than Business or VFR visitors.

How far in advance did you plan your trip?



Motivations to visit Shetland

Leisure visitors only



The scenery, the history/culture and something they have always wanted to do were the main factors influencing Leisure visitors to visit Shetland.

Some visitors were also inspired by TV programmes, travel features in the press and books on Shetland.

Key Reasons for Visiting Shetland



Scenery and landscape – 57%



Always wanted to visit – 50%



History and culture – 33%

Inspiration for Visiting Shetland



TV programme – 28%



Travel feature in a newspaper/mag - 15%



A book about Shetland - 15%

Information used to plan the visit

Leisure visitors only



Visitors used mainly online sources and talking with family and friends to plan for their trip
→ advocacy is important in encouraging people to visit the islands.

Indeed, 89% of Leisure visitors scored 8 or more out of 10 in terms of their likelihood to recommend Shetland to others.

Sources Used During Planning



Websites – 68%



Talking with friends/family – 41%



Printed travel guide books – 23%

Online information

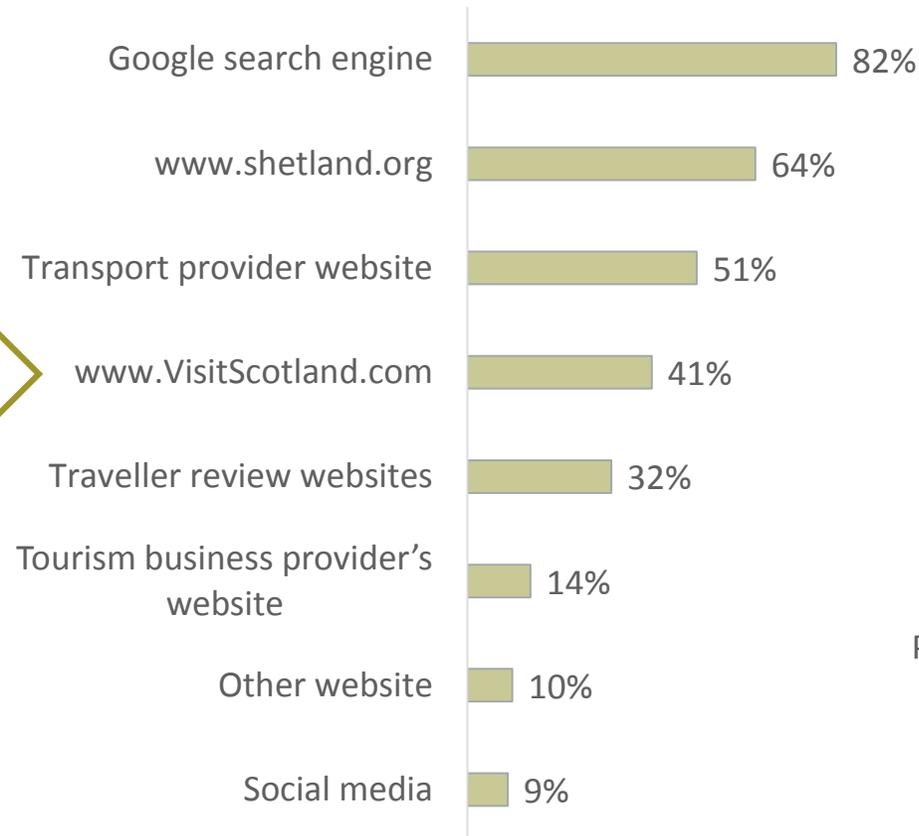
Leisure visitors only



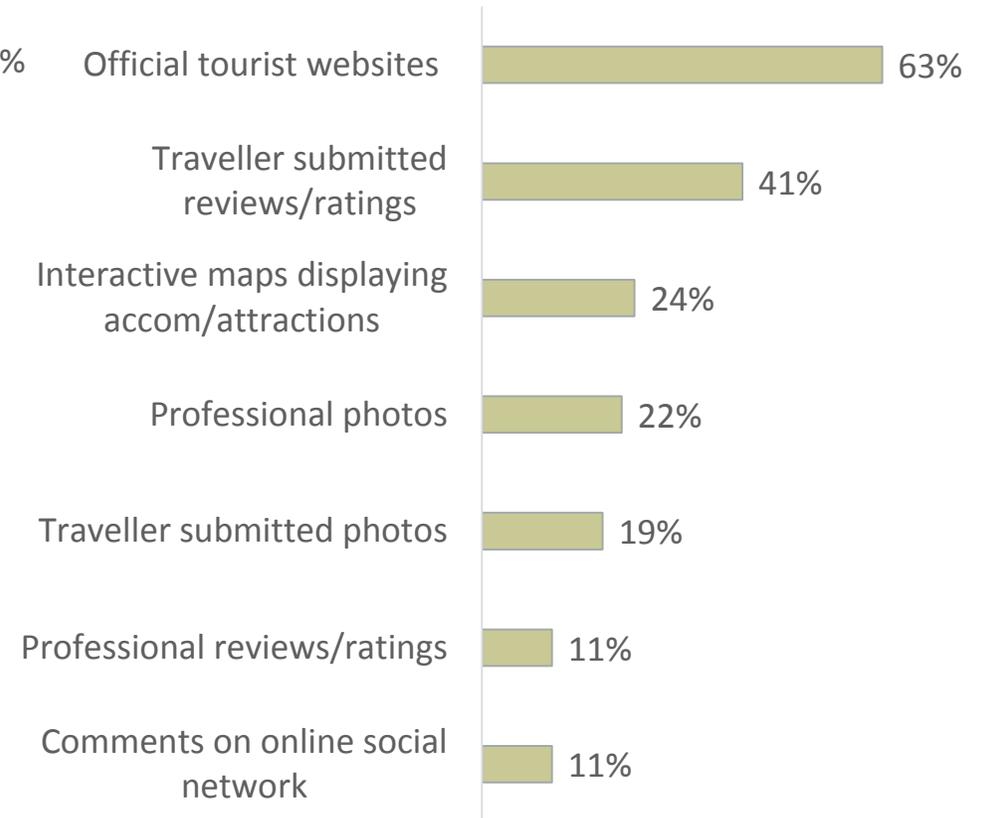
68% used websites when planning visit



Websites used during planning
(top responses)



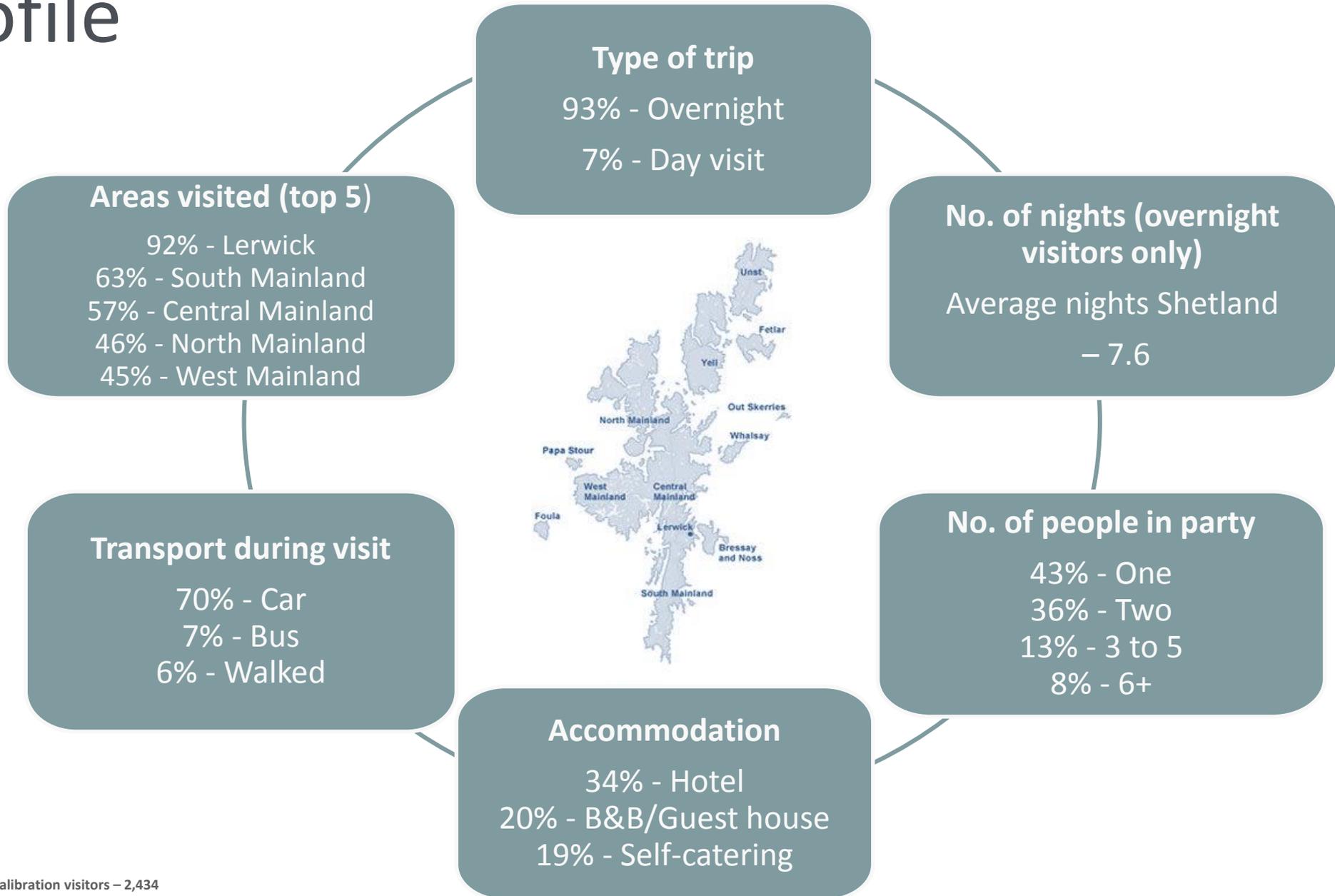
Online information used during planning
(top responses)



Base (Leisure who used online info): 377

Trip profile

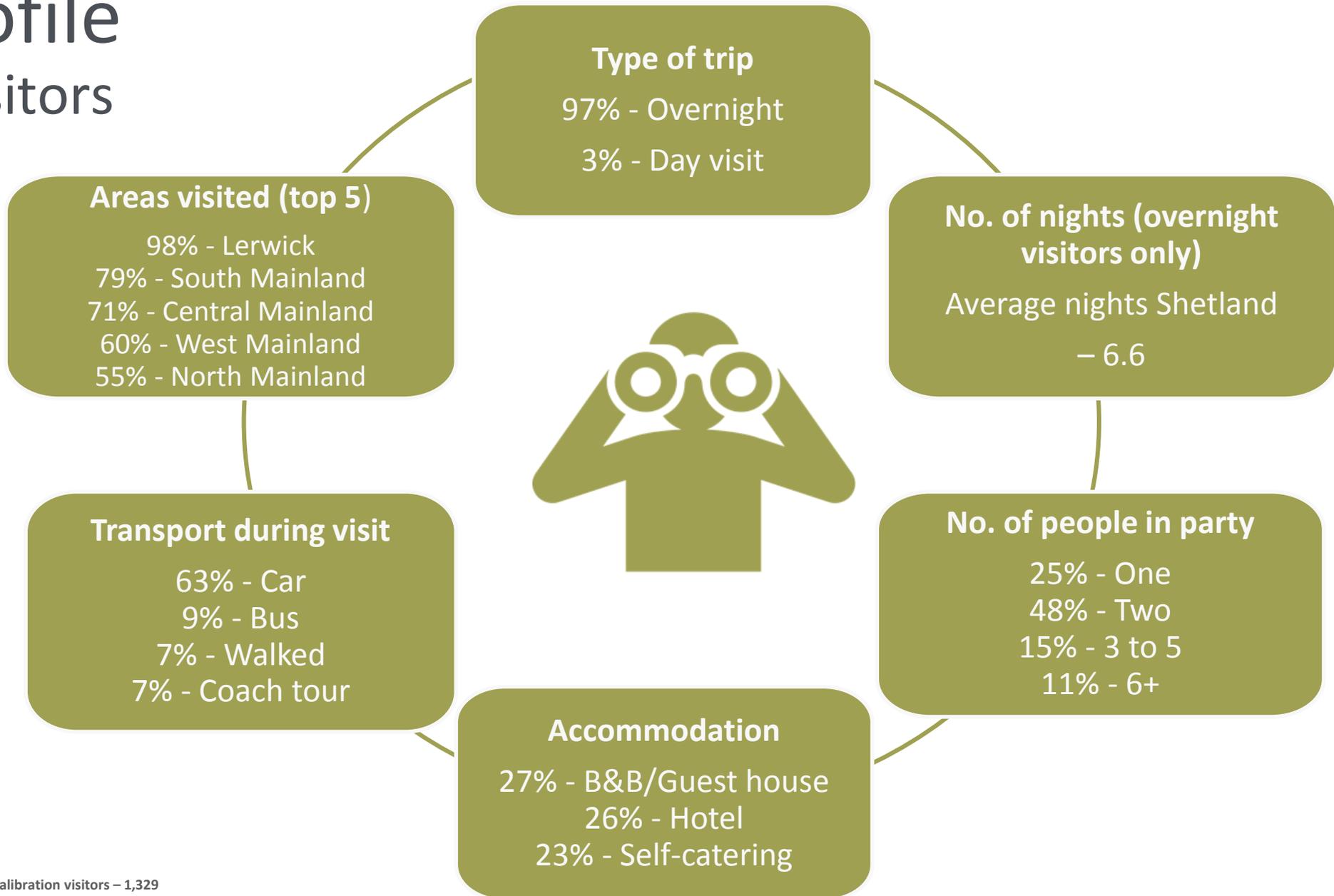
All visitors



Base (Trip type, no of people): All calibration visitors – 2,434
Base (No of nights): Overnight calibration visitors – 2,207
Base (Accom., transport, areas): Online – 802 - 854

Trip profile

Leisure visitors



Base (Trip type, no of people): All calibration visitors – 1,329
Base (No of nights): Overnight calibration visitors – 1,279
Base (Accom., transport, areas): Online – 535 - 551

Sources of information used during trip

Leisure visitors only



Online sources of information were particularly important to Leisure visitors during their trip.

The majority also visited visitor centres, asked the locals or used printed materials, such as brochures.

Almost 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.

Sources of Information Used During Trip



Websites – 70%



Visitor info centres – 53%



Asking locals – 42%



VS brochures – 40%

Evaluation of visitor experience



All visitors

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.

The aspects of their trip which received the highest satisfaction scores were the quality and value for money (VFM) of visitor attractions, historic sites, etc. and the quality of local arts and crafts. The quality of accommodation and friendly service were also widely regarded as being very good.



Made to feel welcome – 96% agreed
Local people really added to the experience – 90% agreed



I experienced excellent customer service – 87% agreed



VFM of visitor attractions – 78%
(rated 8 or more out of 10)



Quality of visitor attractions – 82%
Quality of local arts and crafts – 77%
(rated 8 or more out of 10)

Potential improvements

All visitors



The main area of minority concern was digital coverage, including availability of free Wi-Fi, mobile phone signal coverage and availability of 3G/4G.

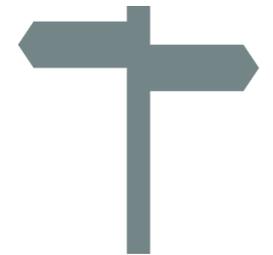
Signposting and travel and transport options were the most mentioned suggested improvements (highlighted by less than 20% of visitors).

Rating of digital coverage

Suggested improvements



3G/4G



Availability of free Wi-Fi – 35%
(rated it less than 5)

Mobile phone signal
coverage – 43%
(rated it less than 5)

Availability of 3G / 4G – 54%
(rated it less than 5)

Open ended comments suggested that for some visitors more could be done regarding travel and transport options and timetables, and better signposting to attractions and on roads.

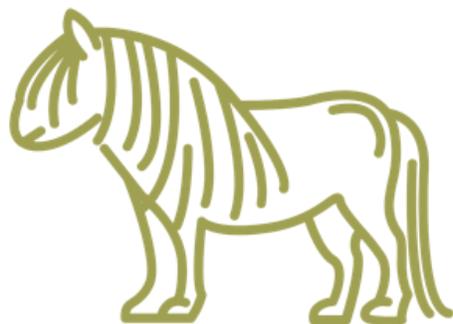
Overall satisfaction with experience

Leisure visitors



The vast majority of visitors to Shetland provided a very positive evaluation of their experience on the islands.

In total, 98% of Leisure visitors were satisfied with their trip – 84% were 'very satisfied'.



74% agree that there is more to Shetland than they previously thought

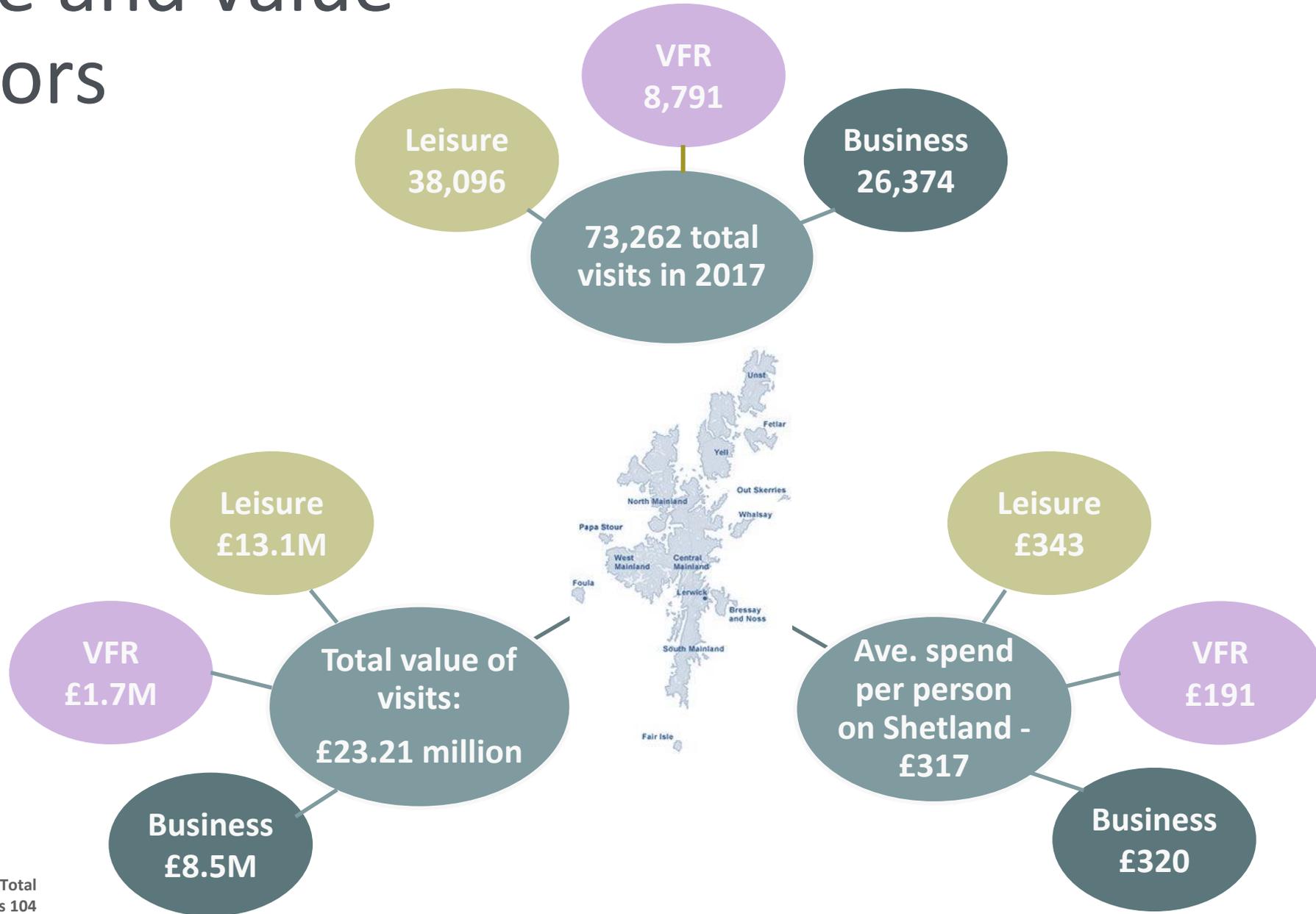


90% agree that Shetland is worth visiting more than once.
67% scored at least 8 out of 10 in terms of their likelihood to return in the next 5 years.



84% of Leisure visitors were 'very satisfied' with their trip to Shetland

Volume and value of visitors



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



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.