



progressive

Shetland Islands Visitor Survey 2019 Executive Summary

Shetland Islands Council and
VisitScotland



Alba™



Shetland
Islands Council

Background and method



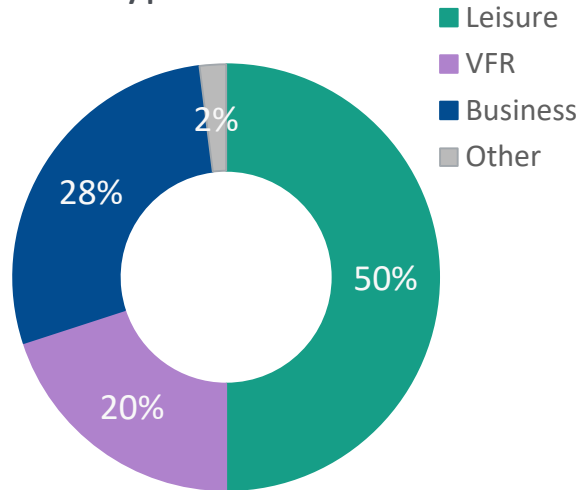
- Shetland Islands Council, in partnership with VisitScotland, commissioned Progressive to conduct a visitor survey on the Shetland Islands in 2019. The objectives of the research were to provide robust and up-to-date estimates of visitor volume and value, as well as information on experiences, motivations, behaviours and perceptions. The research conducted in 2019 was the second wave of the study following an initial baseline wave undertaken in 2017.
- 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 – Holmsgarth ferry terminal and Sumburgh Airport
 - Stage 2 – Follow-up online survey to gather more detailed feedback
- Stage 1 - Calibration Interviews
 - In total, 3,363 calibration interviews were completed – 1,572 visitors; 1,725 island residents; 66 others
 - The research included only people departing by ferry or air and therefore excluded cruise passengers and people travelling by yacht.
- 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, 895 online survey invites were sent.
 - The final sample response was 424 completed online surveys (47% response rate). The base sizes for some sub-sample reporting are low and should be treated with caution. These are marked throughout this report with a caution sign. ⚠
- Calibration data was weighted to reflect the distribution of passengers at the airport and 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

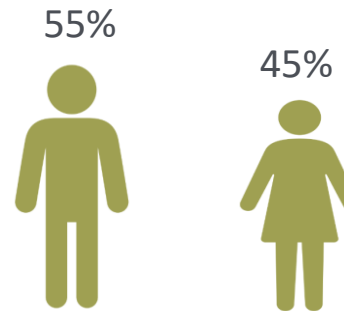
- Key metrics



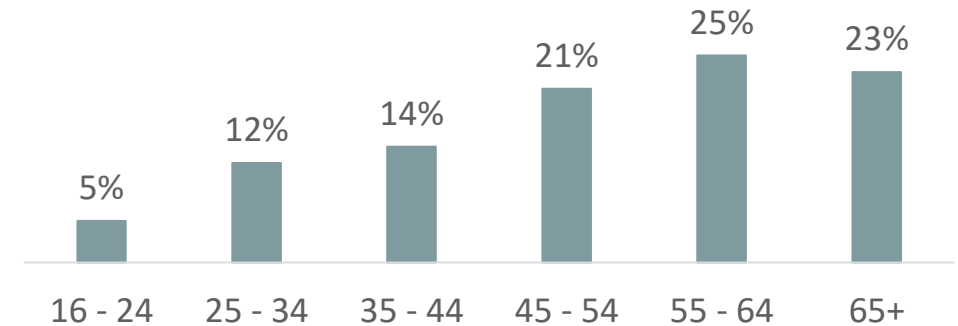
Type of visitor



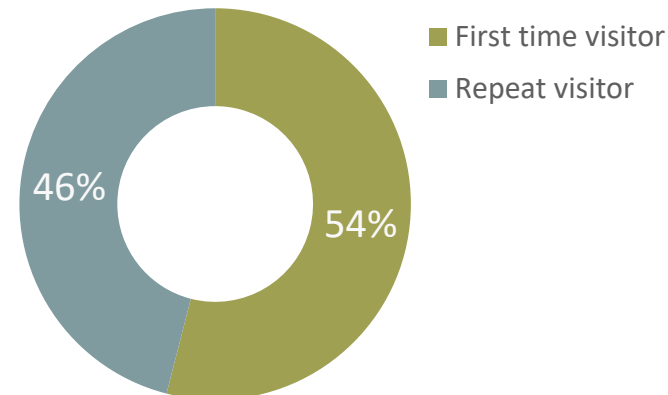
Gender*



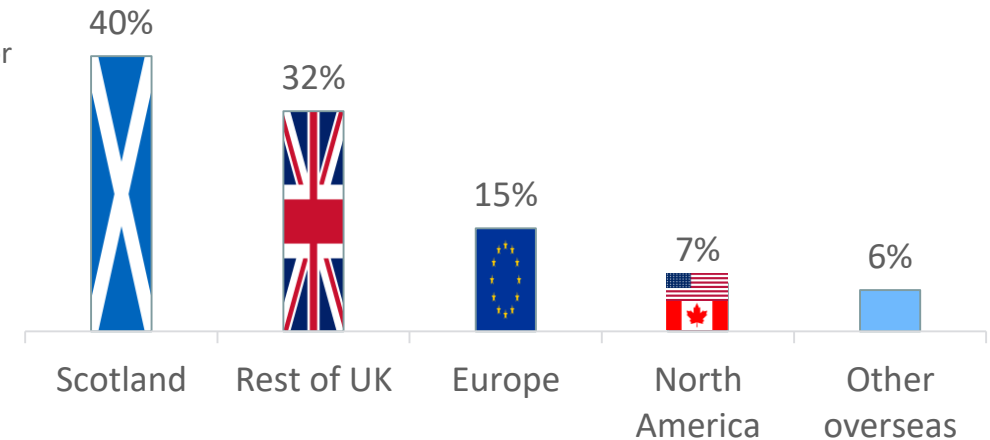
Age*



Been to Shetland before?



Where are you from?



Compared to 2017 there has been an increase in the proportion of visits to friends and relatives (11% in 2017) and a decrease in business visits (35%). A slightly smaller proportion of visitors were from Scotland than in 2017 (45%) and more were from North America (4% in 2017). More visitors were first time visitors in 2019 (54%) than in 2017(46%).

Profile of Leisure visitors

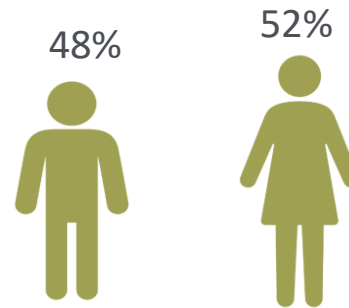
- Key metrics



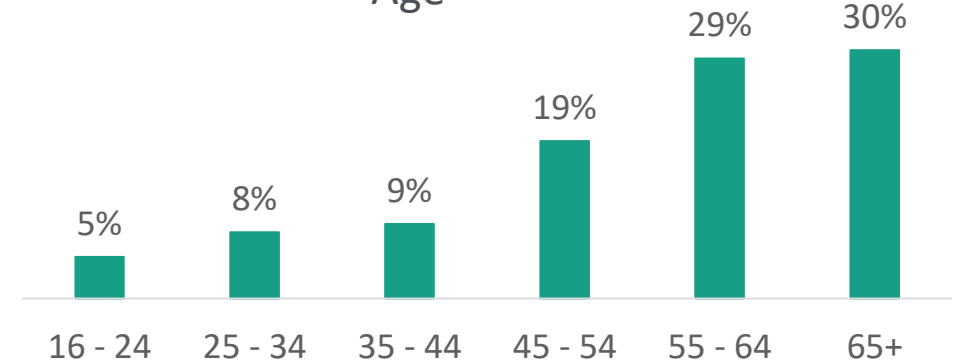
Type of visitor



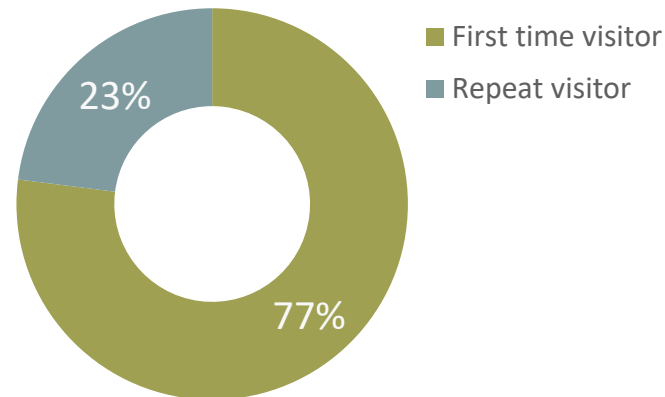
Gender*



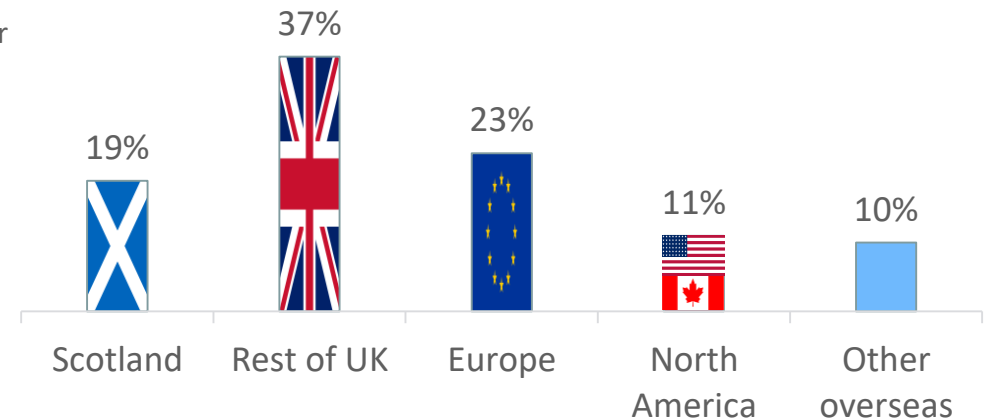
Age*



Been to Shetland before?



Where are you from?



The profile of Leisure visitors in 2019 was mostly unchanged from 2017. There was, however, an increase in first time visitors – from 64% in 2017 to 77% in 2019. There was also a decrease in the proportion of visitors from Scotland (30% in 2017) and an increase in those from overseas (34% in 2017 to 44% in 2019)

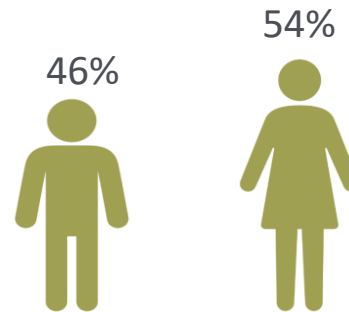
Profile of people visiting friends and relatives - Key metrics



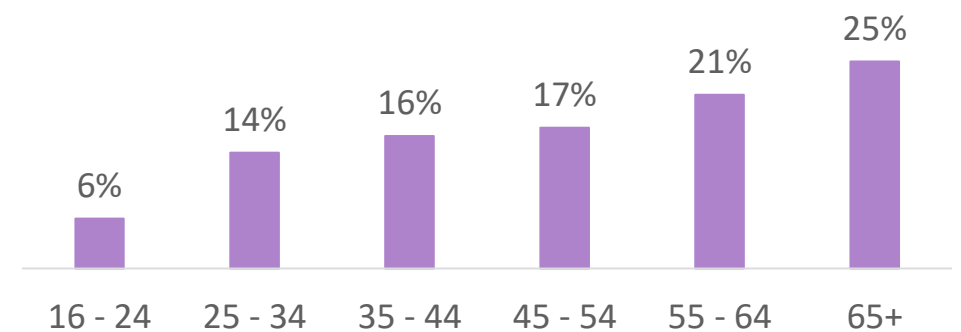
Type of visitor



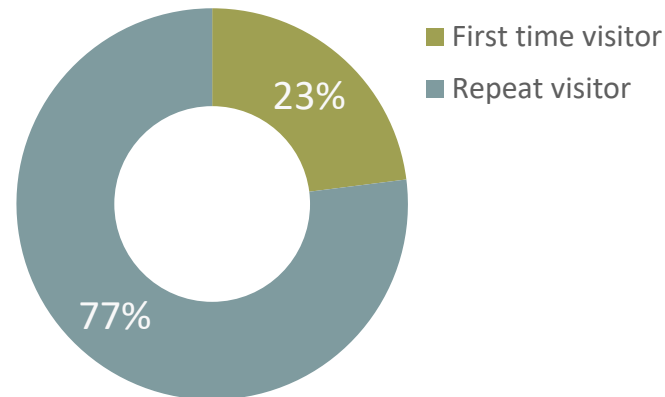
Gender*



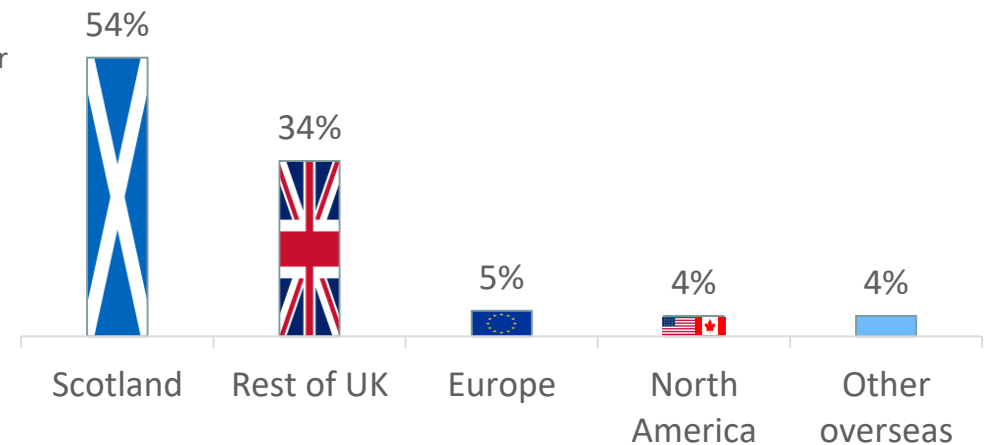
Age*



Been to Shetland before?



Where are you from?



The profile of people visiting Shetland to visit friends and relatives in 2019 was closely matched to the profile measured in 2017.

Profile of Business visitors

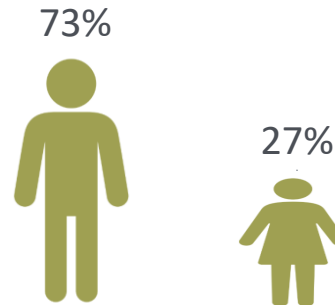
- Key metrics



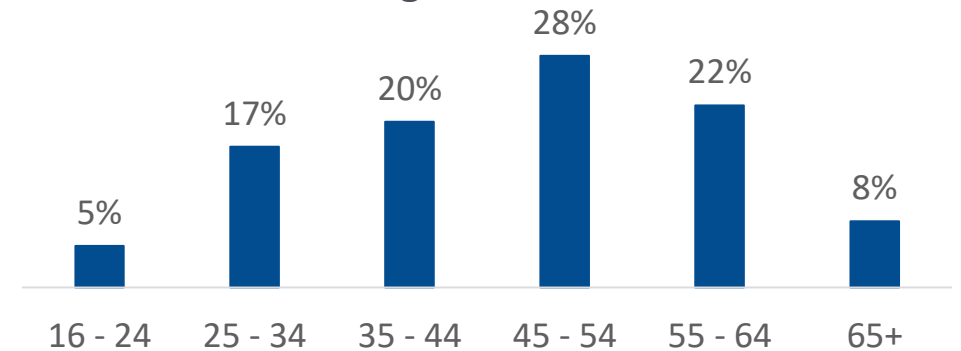
Type of visitor



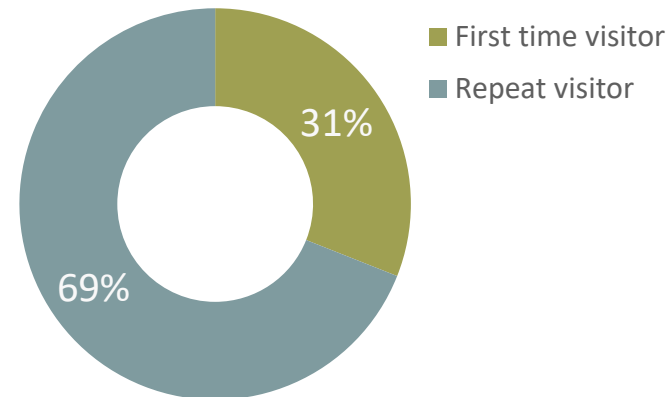
Gender*



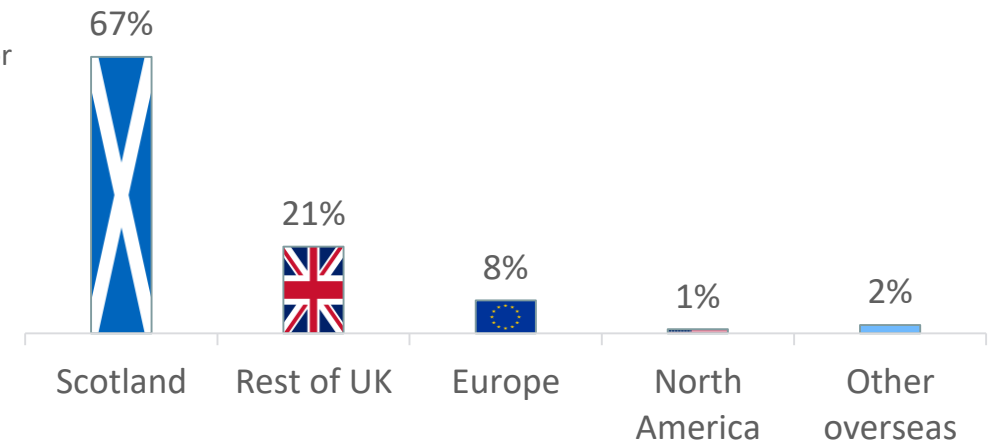
Age*



Been to Shetland before?



Where are you from?



The profile of Business visitors in 2019 was generally very similar to the profile measured in 2017. There were, however, more female business visitors in 2019 (27%, compared to 15% in 2017).

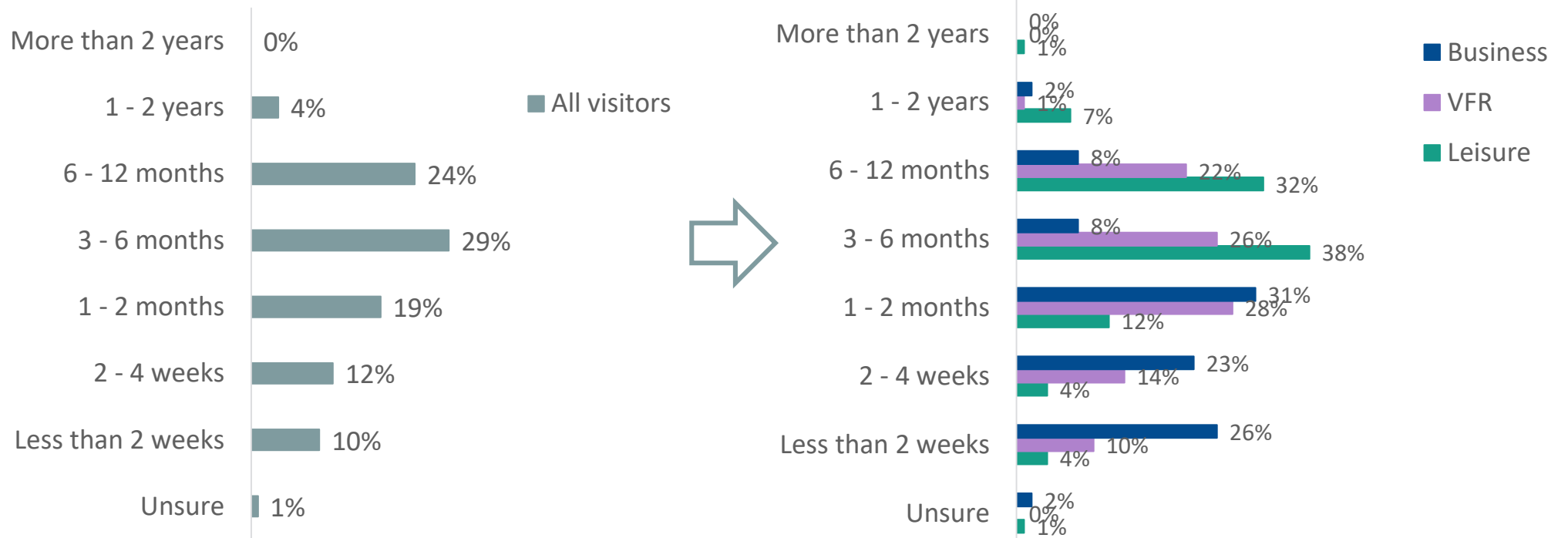


Planning a trip to Shetland



Planning the trip tends to start at least 3 months before travel. Leisure and VFR visitors were more inclined to plan further in advance than Business visitors. Although broadly consistent with 2017 data, there was some evidence that Leisure and VFR visitors are planning and booking further ahead in 2019 – possibly reflecting higher demand for accommodation.

How far in advance did you plan your trip?



Motivations to visit Shetland

Leisure visitors only



Similar to 2017, the scenery and the history/culture were the main factors influencing Leisure visitors to visit Shetland in 2019. Over two thirds also said simply that they had always wanted to visit.

More than half of Leisure visitors (55%) were inspired by something they had seen or heard – e.g. TV programmes, travel features in the press/guidebooks and books about or set in Shetland. The TV detective series 'Shetland' and books were particularly influential.

Key Reasons for Visiting Shetland

Inspiration for Visiting Shetland



Scenery and
landscape – 69%



Always wanted
to visit – 68%



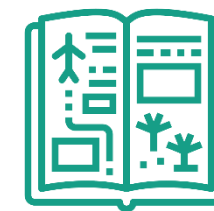
History and
culture – 49%



TV programme
– 38%



A book about
Shetland - 21%



Travel feature in
press/guidebooks
- 18%

Information used to plan the visit

Leisure visitors only



Visitors used mainly online sources, printed travel guidebooks and talking with family and friends to plan their trip → advocacy continues to be an important factor encouraging people to visit the islands.

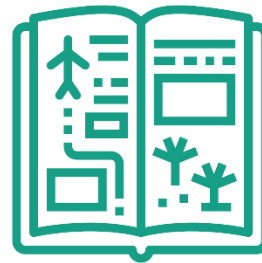
Indeed, as was found in 2017, 92% of Leisure visitors in 2019 scored 8 or more out of 10 in terms of their likelihood to recommend Shetland to others.

Social media was used by a minority of Leisure visitors (14%), however, the proportion mentioning it has increased since 2017 (9%). There were also increases in those using websites and printed travel books in 2019 compared to 2017 (68% and 23% respectively).

Sources Used During Planning



Websites – 80%



Printed travel guide
books – 34%



Talking with
friends/family – 30%

Online information

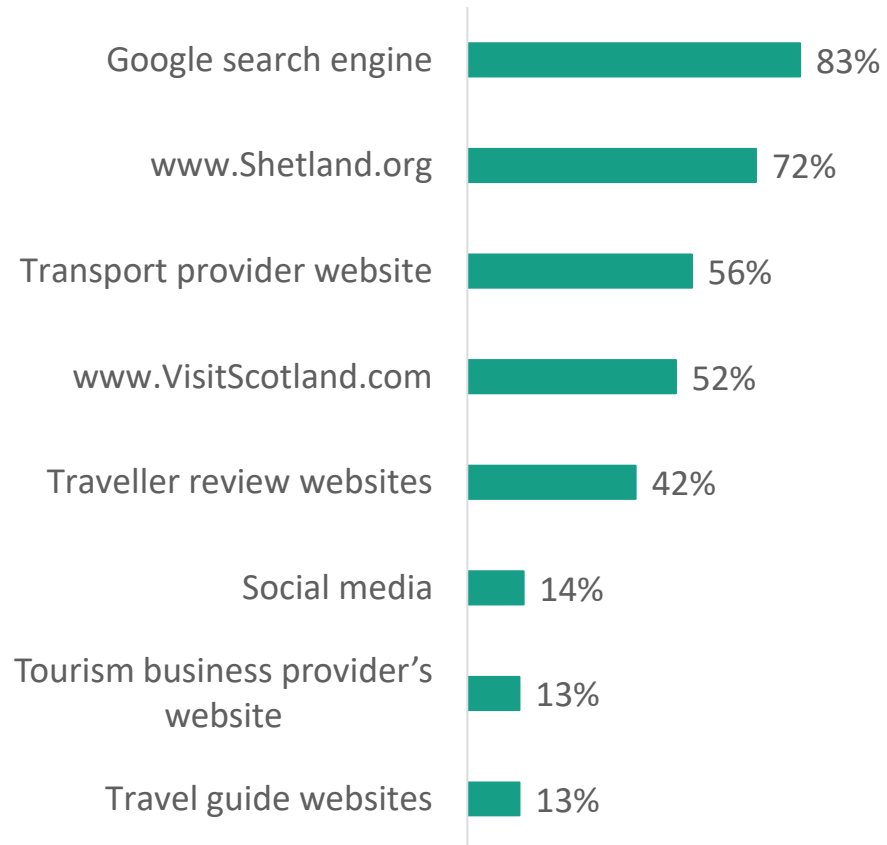
Leisure visitors only



**80% used
websites when
planning visit**



Websites used during planning (top responses)



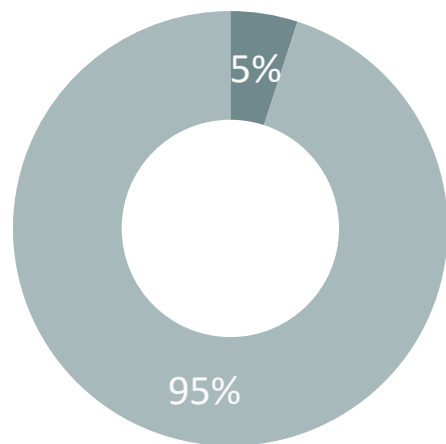
Online information used during planning (top responses)



Trip profile - All visitors

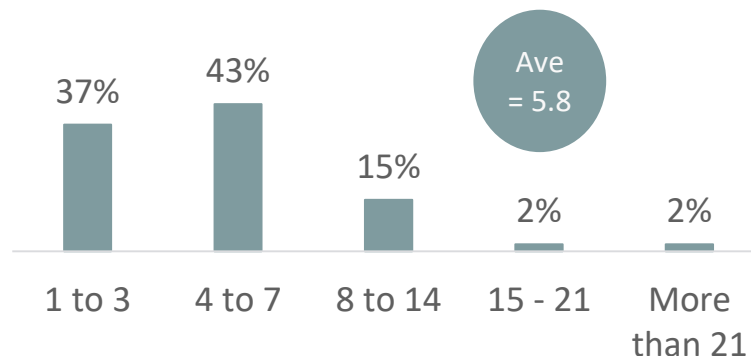


Type of trip

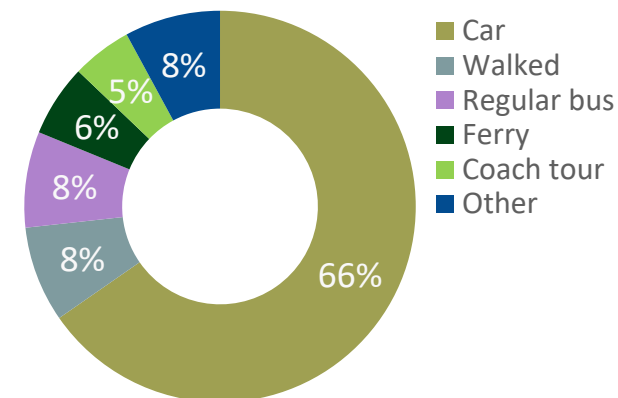


Day trip
Overnight

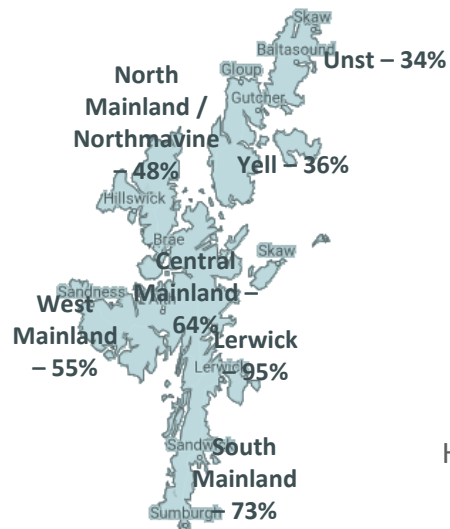
Number of nights



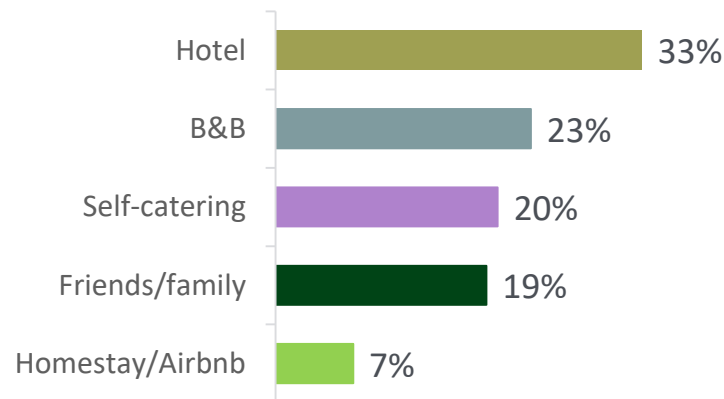
Main type of transport



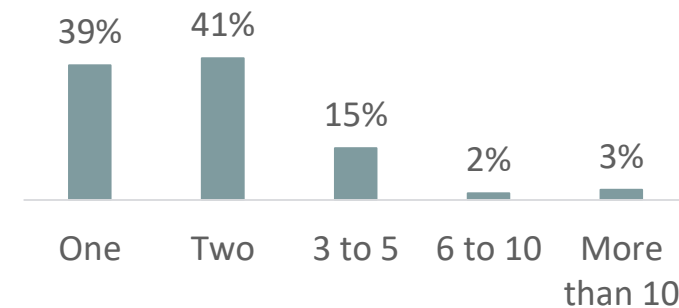
Areas visited (top answers)



Accommodation (top 5)



Number of people in party

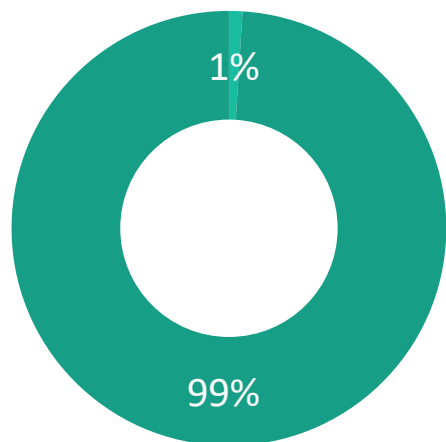


The average number of nights was lower in 2019 (5.8) compared to 2017 (7.6). There have been increases in those visiting South and West Mainland in 2019 (63% and 45% respectively in 2017). 2019 also saw an increase in mentions of homestay (e.g. Airbnb) accommodation – from 4% in 2017 to 7% in 2019.

Trip profile - Leisure visitors

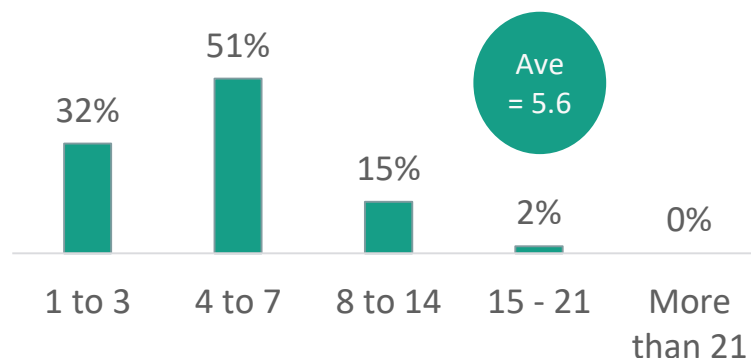


Type of trip

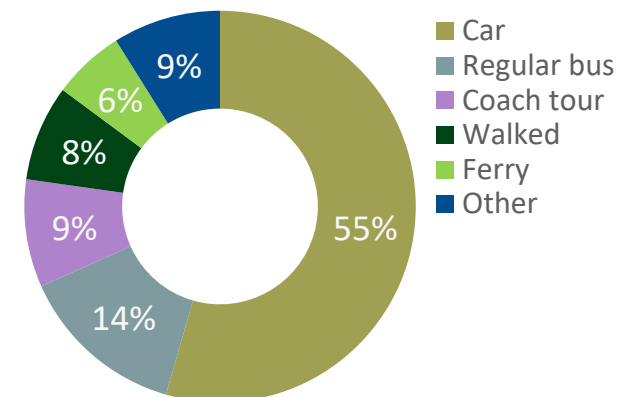


Day trip
Overnight

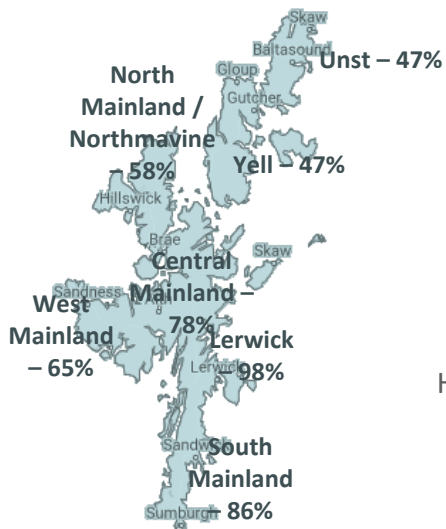
Number of nights



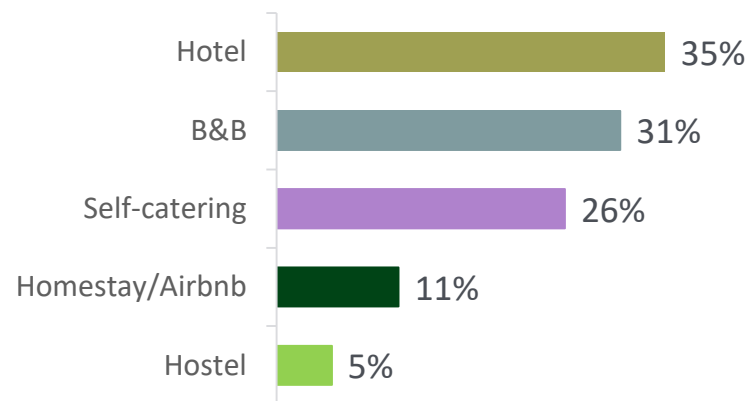
Main type of transport



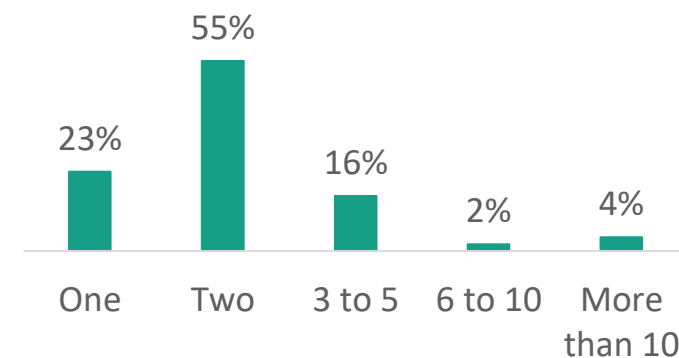
Areas visited (top answers)



Accommodation (top 5)



Number of people in party



There have been increases in Leisure visitors to South and Central Mainland in 2019 compared to 2017 (79% and 71% respectively in 2017). In 2019 there was also an increase in those staying in hotels (26% in 2017) and homestay accommodation (6% in 2017). Fewer travelled by car in 2019 (63% in 2017) and more travelled by bus (9% in 2017).

Sources of information used during trip

Leisure visitors only



Online continues to be the primary source of information for Leisure visitors during their trip. The majority also used printed materials, such as local information, brochures and guidebooks.

Compared to 2017, there were increases in usage of the internet (70% in 2017) and local heritage information (19% in 2017).

Half of Leisure visitors actively engaged with online or social media activity during or after their trip – most commonly to upload photos, update their Facebook status or post a review online.

Sources of Information Used During Trip



Websites –
85%



Visitor info
centres – 56%



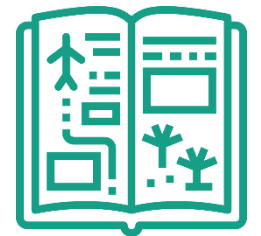
Asking locals
– 43%



Local Heritage
information – 41%



VisitScotland
brochure – 36%



Locally produced
guide books – 29%

Evaluation of visitor experience

All visitors



Interactions with local people were again a particular highlight for visitors – similar to 2017, 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 of visitor attractions, historic sites, etc., the quality of local arts and crafts products, local information and the quality of local food and drink. The quality of accommodation was also widely regarded as excellent.



Made to feel welcome – 98% agreed
Local people really added to the experience – 96% agreed



I experienced excellent customer service – 90% agreed



Value for money of visitor attractions – 83%
(rated 8 or more out of 10)



Quality of visitor attractions – 87%
Quality of local arts and crafts – 83%
Quality of food and drink – 79%
(rated 8 or more out of 10)

Potential improvements

All visitors



There was an improvement in perceptions of digital coverage in 2019 (availability of free Wi-Fi, mobile phone signal coverage and availability of 3G/4G) with more people satisfied with this than in 2017, particularly 3G/4G. However there remains some scope for improvement with around one quarter dissatisfied.

Food and drink choices, transport and signage/information were the most mentioned suggested improvements (each highlighted by around 10% of visitors).

Rating of digital coverage



Availability of free Wi-Fi

Rated 6 to 10 – 78%
Rated it 5 or less – 19%



Mobile phone signal coverage

Rated 6 to 10 – 78%
Rated it 5 or less – 21%



Availability of 3G / 4G

Rated 6 to 10 – 73%
Rated it 5 or less – 27%

Suggested improvements



Open ended comments suggested that for some visitors restaurant and food choices were limited (they especially wanted more local seafood); and more could be done regarding transport links across the Islands and affordable transport to the islands.

Overall satisfaction with experience

Leisure visitors



The vast majority of visitors to Shetland provided a very positive evaluation of their experience on the islands – similarly high ratings were measured in both 2017 and 2019.

In 2019, 94% of Leisure visitors rated their satisfaction with their trip to Shetland with a score of 8, 9 or 10 out of 10 – 59% gave a perfect 10 out of 10 score.



75% agreed that there is more to Shetland than they previously thought

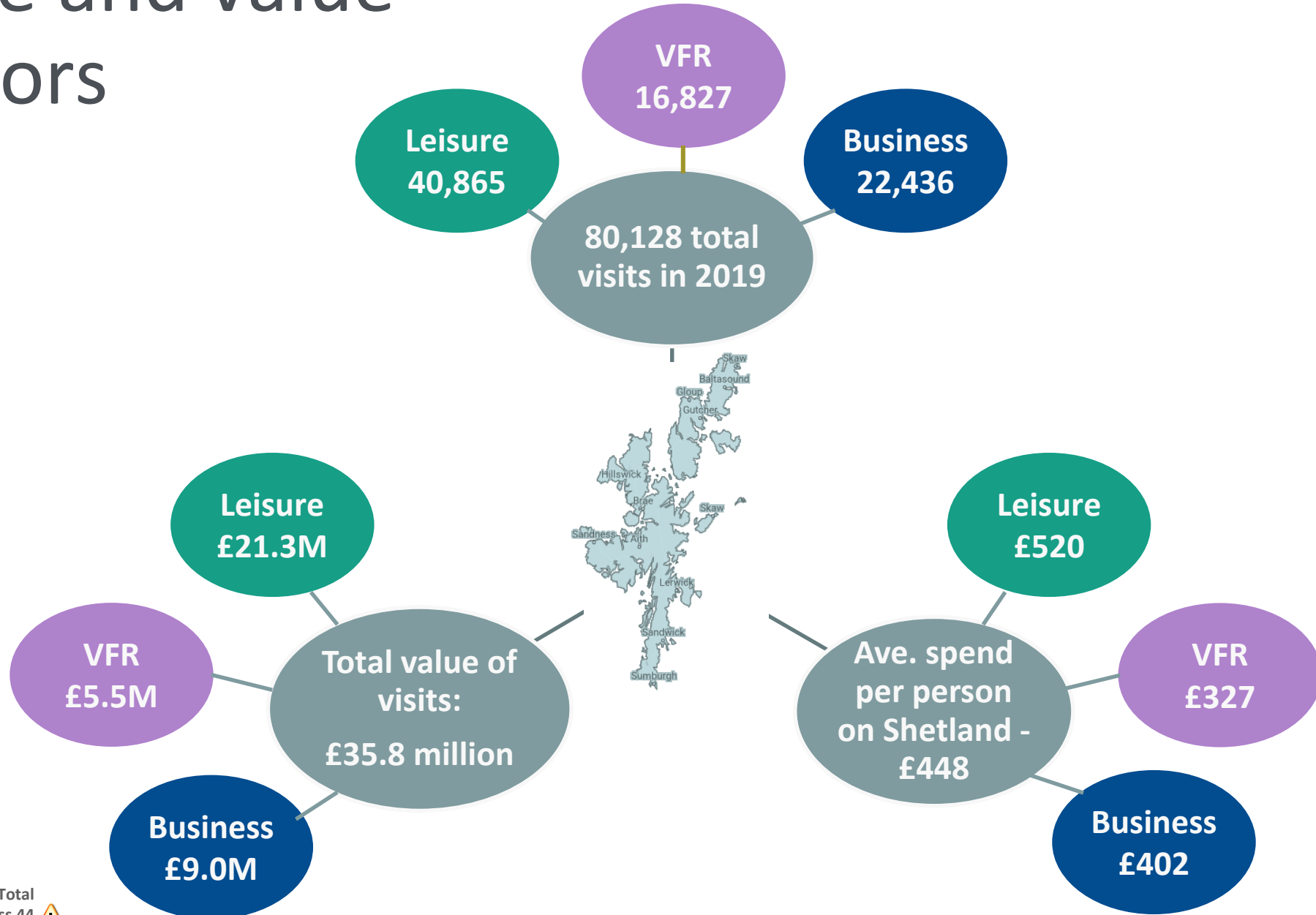


90% agreed that Shetland is worth visiting more than once.
60% scored at least 8 out of 10 in terms of their likelihood to return in the next 5 years.



94% of Leisure visitors scored at least 8 out of 10 in terms of their overall satisfaction with their trip to Shetland

Volume and value of visitors





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 Islands in 2019.
- The target sample size for the calibration interviews was 3,500 and the final achieved sample size was 3,363. The reason for the difference between these two samples was lower than expected response rates at some sampling points.
- The target sample size for the online survey was 630 and the final achieved sample size was 424. The reason for the difference between these two samples was lower than estimated calibration interviews with visitors (estimated – 1750; achieved - 1,572) and lower than estimated percentage providing an email address to participate in the online survey (estimated – 80%; achieved – 57%).
- Fieldwork was undertaken between January and December 2019.
- 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 47%.
- 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 Rest of UK and 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, 10 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 via close monitoring of the online survey to measure % email addresses collected, % bounce backs and response rate to online survey. 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 (airport and ferry terminal)
 - Online – visitor type and origin (based on calibration data)
- 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.
- 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.
- 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.
- 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.