



Shetland Islands Council and
VisitScotland

Shetland Islands Visitor Survey 2024

February 2025



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Project background

- The Shetland Islands are known for its beautiful landscapes and rich cultural heritage. Tourism is a major contributor to the local economy and is closely linked to other sectors, such as food and drink, arts and crafts, nature, wildlife, culture and heritage.
- In 2020, the tourism landscape changed having been profoundly impacted by the Covid-19 pandemic. This was followed in more recent years by the cost-of-living crisis, which has also affected people's choices in holiday and short break destinations. In the wake of these shocks to the industry, new trends in tourism are emerging, including wellness tourism, a desire for deeper connections with local communities, and visitors looking for both authentic cultural experiences and unique adventure activities.
- In this time of change, it is vital that Shetland Islands Council and other tourism industry stakeholders understand the 'new norm' in terms of visitor expectations, perceptions and experiences.
- Visitor surveys have been carried out in Shetland over a number of years, with the most recent waves in 2017 and 2019. The surveys have gathered valuable insights and enhanced understanding of the impact visitors have to the islands.
- In 2024, Shetland Islands Council, in partnership with VisitScotland, commissioned the latest wave of the visitor survey, the findings from which are presented in this report.



Project objectives



* VFR – Visiting friends and relatives

Method

The research data was gathered using a two-stage approach:

1. Stage 1 – calibration interviews conducted face-to-face with visitors at key exit points from the islands (Sumburgh Airport and Holmsgarth Ferry Terminal)
2. 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 five minutes
- Data gathered included profiling data and type of trip – leisure, visiting friends and relatives (VFR), business
- Fieldwork took place from April to October 2024.*
- A random sampling approach was taken to achieve a representative sample of people leaving the islands in terms of visitors and island residents. Cruise ship passengers, people travelling by private yacht and those in transit were excluded from the survey.
- In total, 2,245 calibration interviews were completed – 1,356 visitors; 835 island residents; 54 others



*Fieldwork was only conducted over the peak season of April to October in 2024, whereas in previous waves fieldwork covered the whole year. Throughout this report data for 2017 and 2019 has been adjusted to show April to October only.

Method (continued)

- **Stage 2 – Online Survey:**

- At the end of the calibration interview, respondents were asked if they would like to take part in an online survey
- Email addresses were gathered, and the survey was sent within a two-week period of the calibration interview
- In total, 978 visitors to Shetland agreed to take part in the online survey. From those, 28 email addresses bounced back leaving a potential sample size of 950.
- The online survey remained open for three weeks for each visitor, with three reminders being sent throughout the fieldwork period.
- A monthly prize draw of £100 high street shopping or Amazon vouchers was offered to incentivise participation. Six prize draws were conducted spread throughout the fieldwork.
- The final sample response was 501 completed online surveys (53% response rate)



- **Supplementary approach – QR codes:**

- Posters were designed featuring QR codes and displayed at Sumburgh Airport and onboard both MV Hjaltland and the MV Hrossey (at reception and at the bar)
- The QR codes directed respondents to a shortened version of the online survey, along with key questions from the calibration survey. The questionnaire was designed to screen out those not eligible to take part, e.g. non-visitors and those not at the end of their trip.
- 47 respondents completed a survey in this way and have been included in the results, where possible



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). Respondents to the online survey were self-selecting. This means that we cannot provide statistically precise margins of error or significance testing as the sampling type is non-probability. The margins of error outlined below should therefore be treated as indicative, based on an equivalent probability sample.

Sample type	Sample size	Margin of error
Total Calibration	2,245	+/- 0.41% to +/- 2.05%
Total Sample of Visitors – Calibration	1,356	+/- 0.53% to +/- 2.66%
Total Sample – Online	501	+/- 0.87% to +/- 4.38%
Leisure Visitors – Online	350	+/- 1.04% to +/- 5.24%
VFR Visitors – Online	82	+/- 2.15% to +/- 10.79%
Business Visitors – Online	68	+/- 2.36% to +/- 11.86%

- 2017 and 2019 data have been filtered to show figures for April to October only – to allow direct comparisons to 2024.
- All bases shown are the unweighted bases. Bases vary by question depending on routing. Data from QR code responses are included throughout this report, however, some questions were omitted from the QR questionnaire. Base sizes for questions not asked in the QR questionnaire are lower than the total base size. 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.
- In commentary where net figures are reported (i.e. when figures on charts are combined) these may differ slightly from the added figures in the chart. This is due to rounding and using absolute figures to calculate nets.
- 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 – 16-44; 45-54; 55-64; 65+
 - Previous visits – first time visitor; repeat visitor
- The sample sizes for each sub-group (online sample) are detailed below. The base sizes for some of these sub-samples are small, which has limited the detail of sub-sample analysis in this report.

Visitor type	Base (unweighted)
Leisure	350
VFR	82
Business	68

Origin (Leisure)	Base (unweighted)
Scotland	68
Rest of UK	109
All overseas	173
Europe	71
North America	66

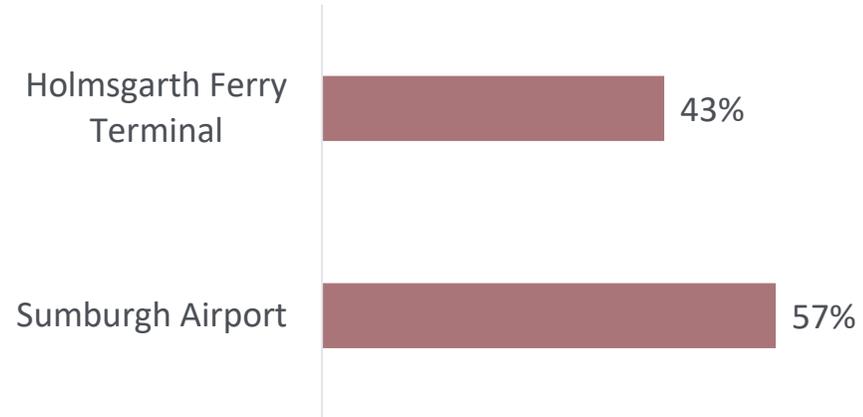
Demographics, etc. (Leisure)	Base (unweighted)
Male	133
Female	215
16-44	56
45-54	44
55-64	121
65+	127
First time visitor	258
Repeat visitor	92

Sample

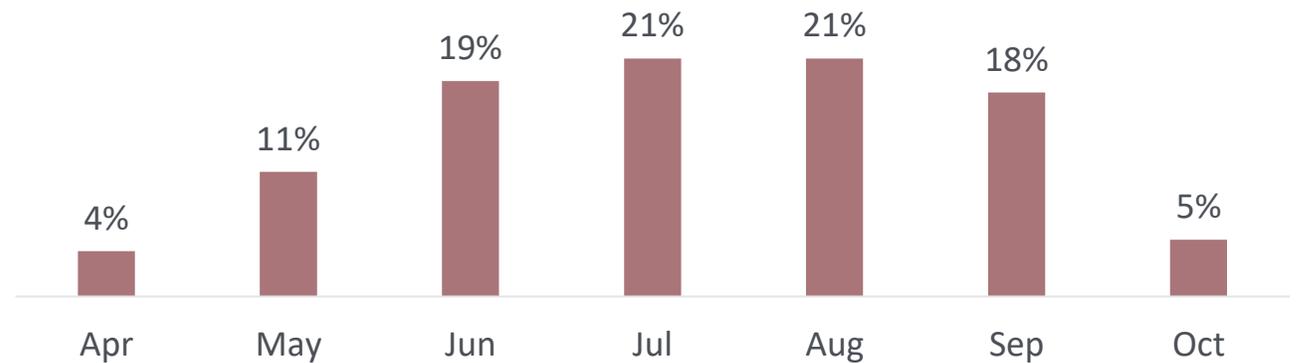
- The sampling plan was designed to provide a representative spread of interviews across exit points and months of the fieldwork period.
- Interviewing was therefore higher in the peak season months of June, July, August and September.
- Passenger data by exit point was supplied by ferry and airport operators in 2017 and 2019. This was used to create a sample plan representative of the volumes of passengers leaving the islands via each exit point. Accurate passenger data for 2024 was supplied by operators early in 2025 and this was used to weight the data as noted over.



Sampling point



Month



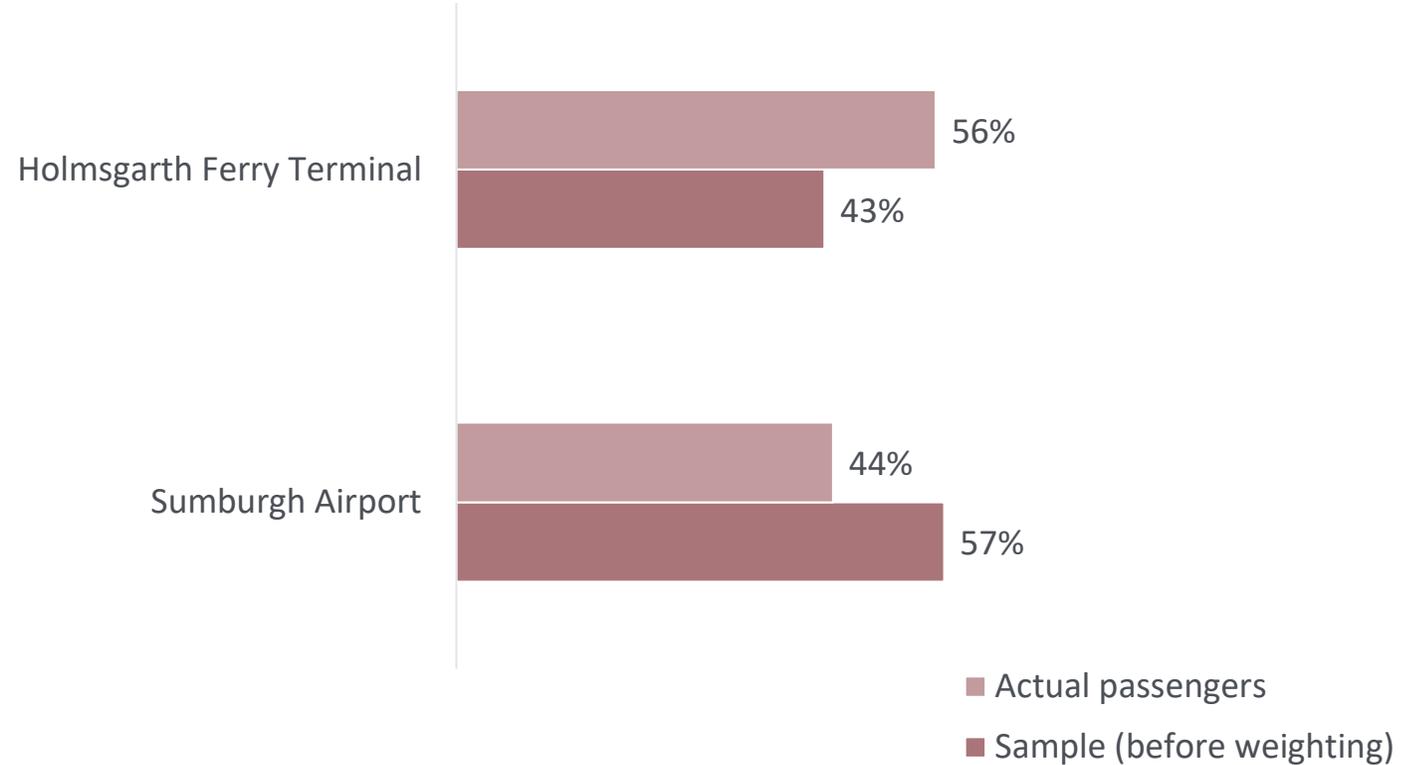
Base (all including non-visitors): 2,245

Data weighting

Calibration survey

- The calibration data was weighted by sampling point to reflect the actual distribution of passengers in 2024.
- Visitor numbers were provided by NorthLink (Holmsgarth Ferry Terminal) and HIAL (Sumburgh Airport).

Sampling point



Base (all including non-visitors): 2,245



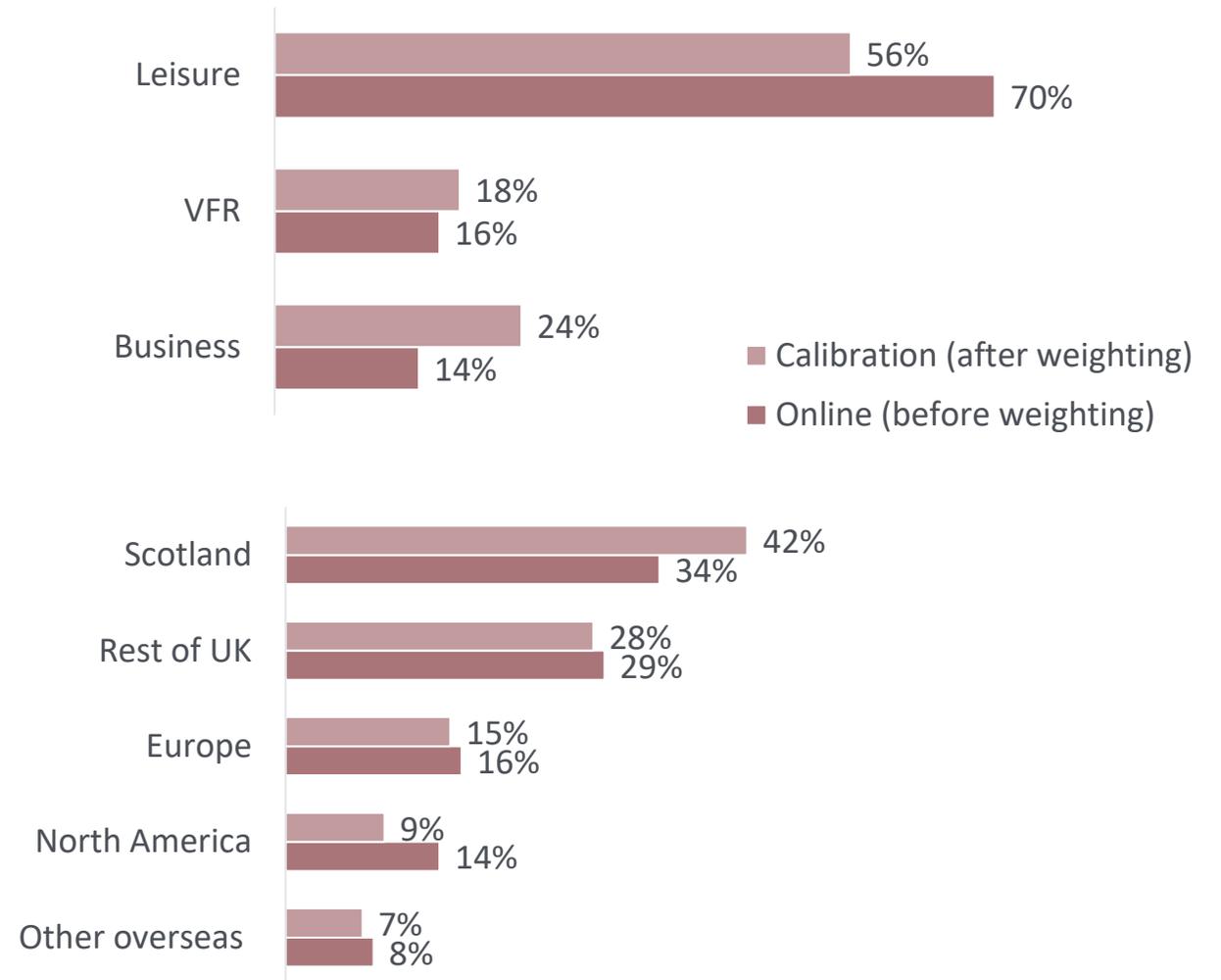
Data weighting

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 before weighting was generally similar to the calibration survey data (after weighting by sampling point). The main difference corrected by weighting was under-representation of Business visitors and Scotland visitors and over-representation of Leisure visitors in the online sample.

Visitor type and origin

progressive



Base (All visitors): Calibration 1,356; Online 501

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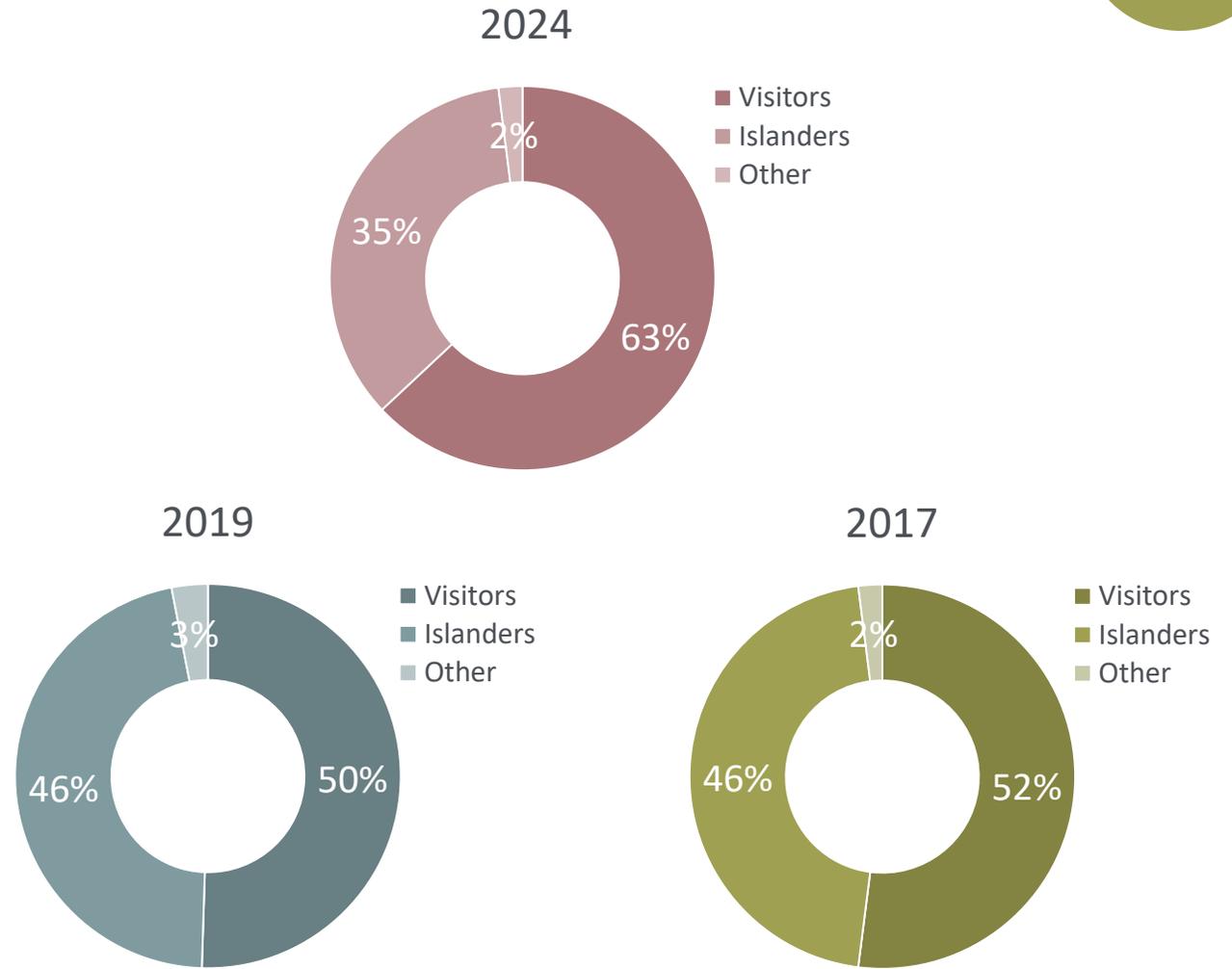
Visitor profile

Visitor profile

Proportion visitors

- Almost two thirds (63%) of all people interviewed for the calibration survey were visitors to Shetland, while 35% were islanders and 2% were other types of visitor excluded from the survey (people in transit between islands; haulage drivers only visiting for the day; or people on a cruise or yacht trip).
- In 2024 there has been an increase in the proportion of visitors compared to the 2017 and 2019 surveys.

Islanders vs. visitors



CSQ2: Can I check that you are a visitor to Shetland, either on a holiday/leisure trip or a business trip?

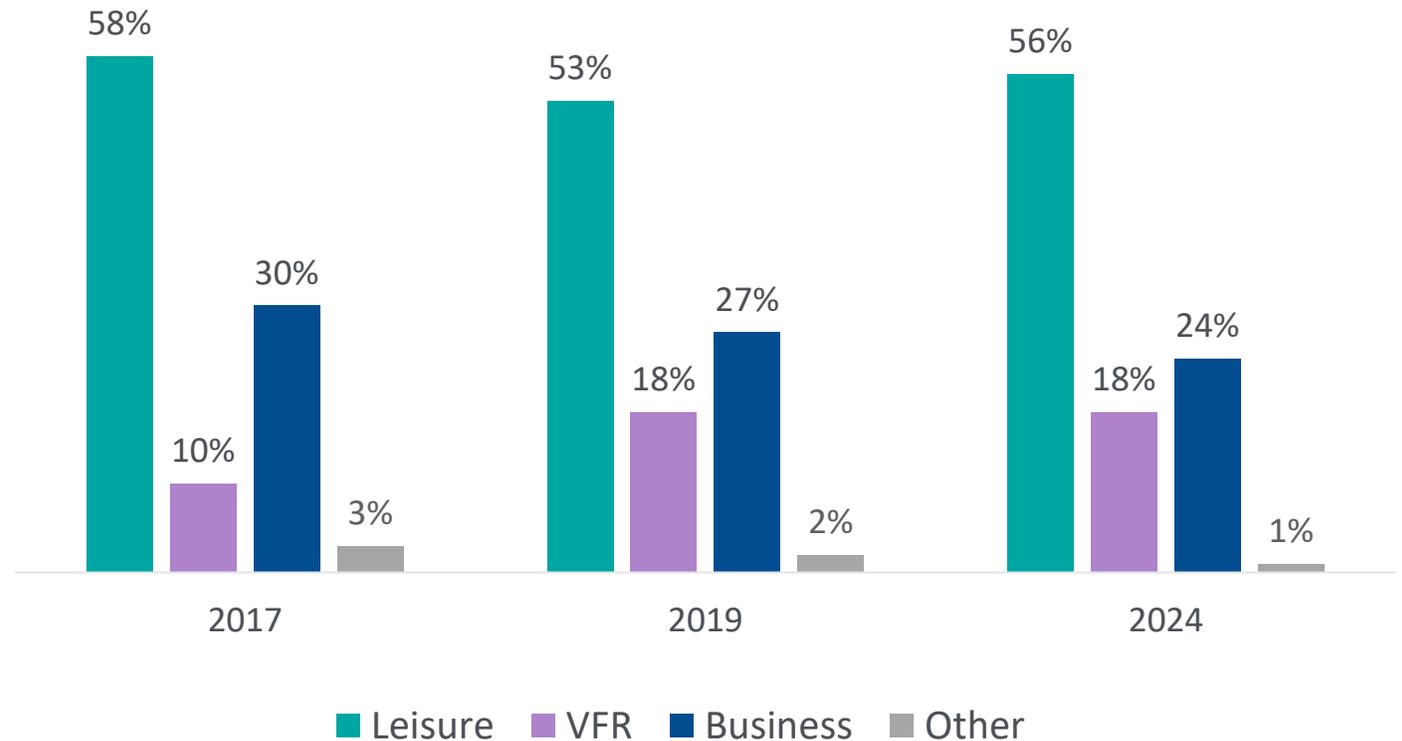
Base (All calibration): 2017: 3,900; 2019: 2,935; 2024: 2,245

Visitor profile

Trip purpose

- More than half of visitors to Shetland in 2024 were leisure visitors (56%), while approximately one fifth (18%) were visiting friends or relatives (VFR) and a quarter were visiting for business purposes.
- The proportions of Leisure and VFR visitors in 2024 are very similar to 2019; however, there is evidence of a decreasing trend in the proportion of Business visitors since 2017. This decrease in business visitors perhaps reflects the move towards online business meetings following the coronavirus pandemic.

Trip Purpose



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

Base (All calibration visitors): 2017: 2,022; 2019: 1,407; 2024: 1,356

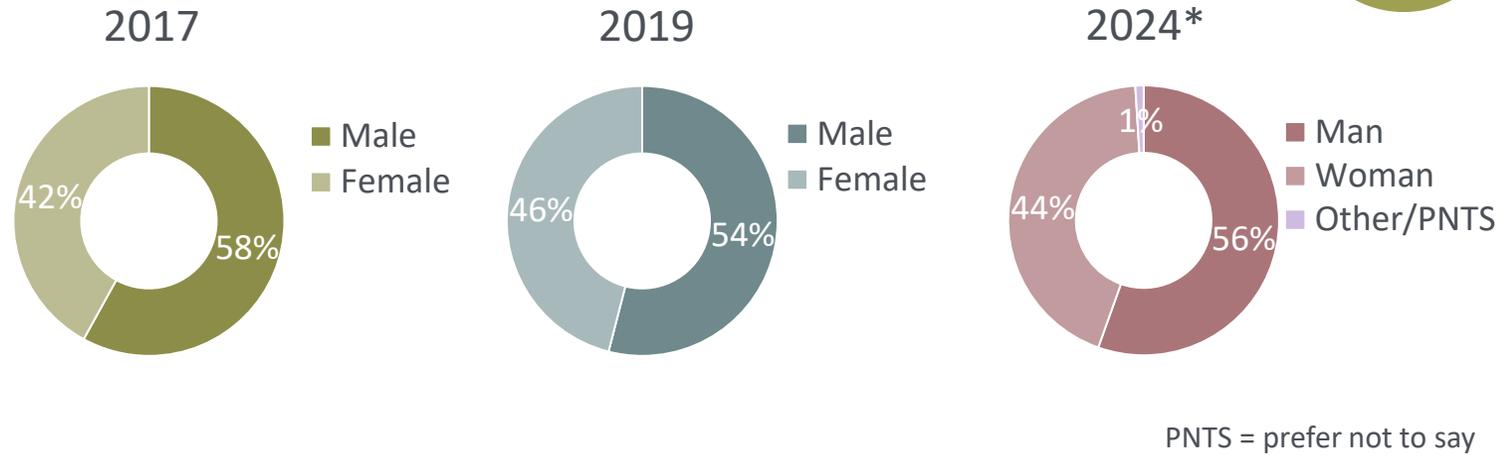
Visitor profile

Demographics

- Consistent with previous waves of the study, the total sample of visitors to Shetland included more males (56%) than females (44%).
- More than half of respondents (53%) were aged 55 or older, with 29% aged 35 to 54 and 17% aged under 35.
- The age profile of respondents was broadly similar to previous years; however, there has been an increasing trend in visitors aged 65+ and a decreasing trend in those aged 45 to 54.

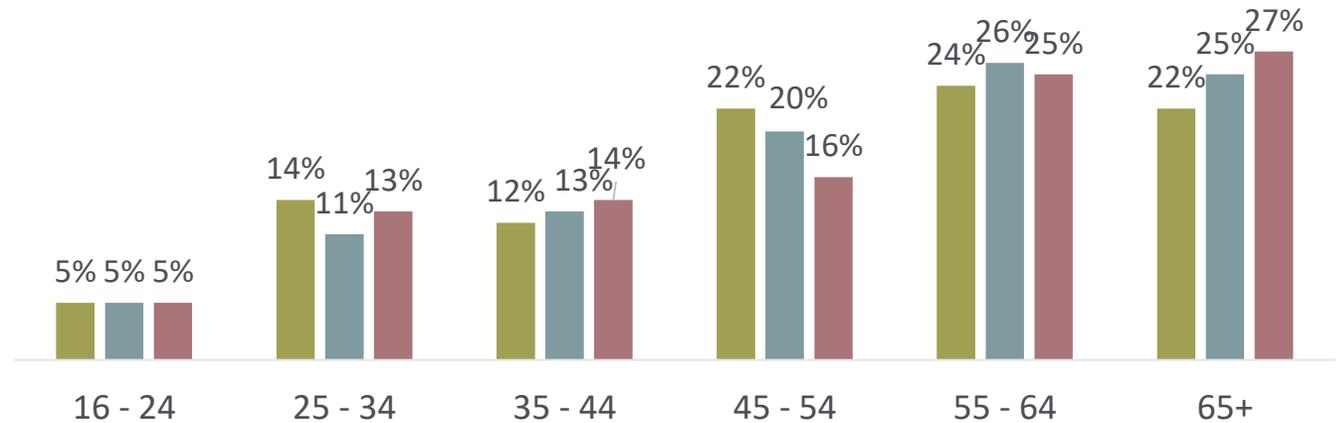
*The gender question and response codes were changed in 2024

Age and gender



PNTS = prefer not to say

2017 2019 2024



CQ7: What is your gender?

CQ8: Which of the following age groups are you in?

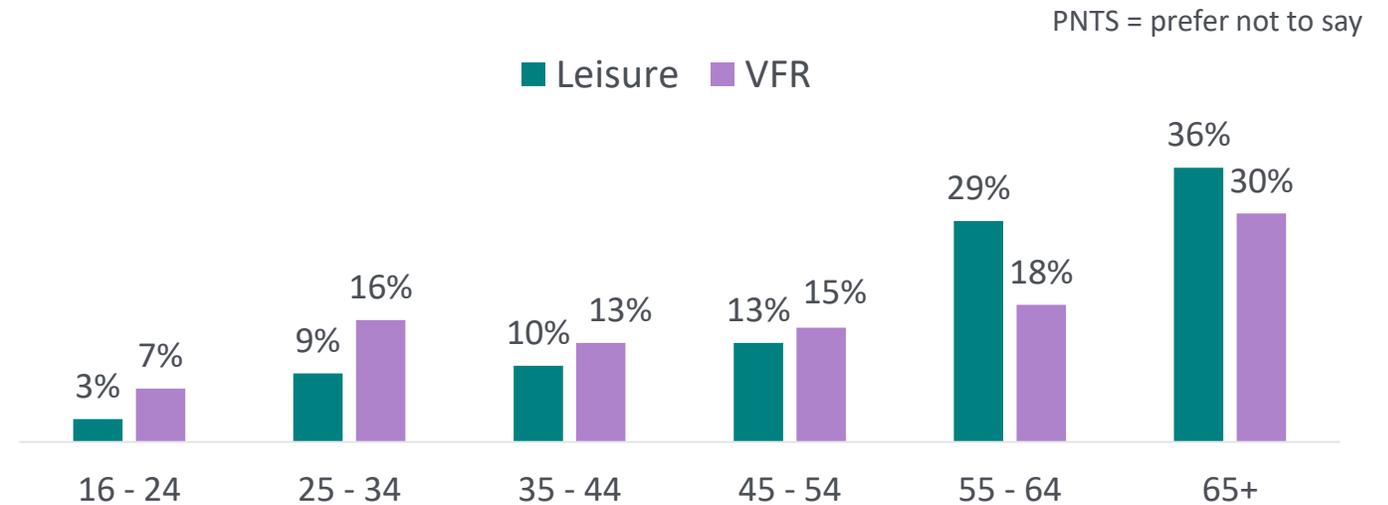
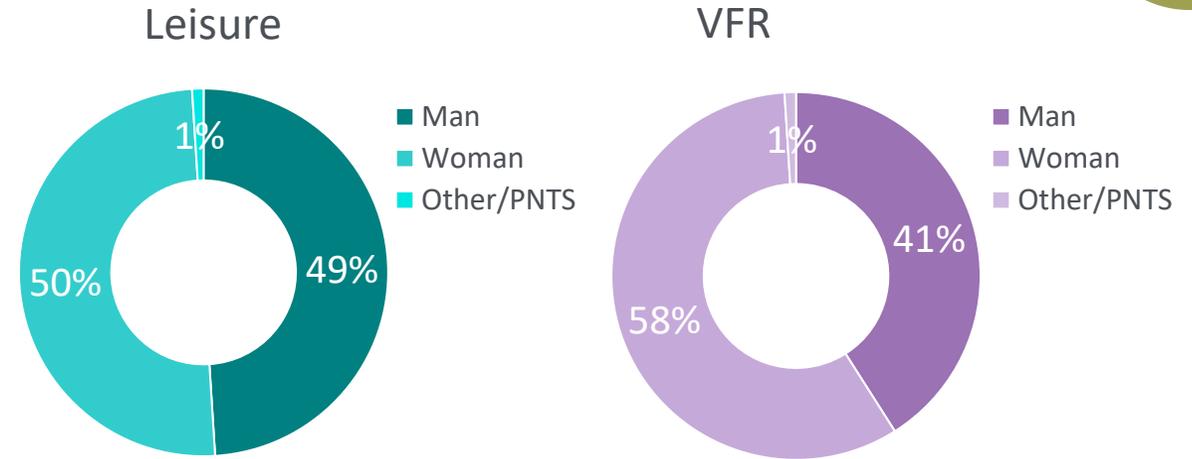
Base (All calibration visitors): 2017: 2,022; 2019: 1,407; 2024: 1,356

Visitor profile

Demographics

- The sample of Leisure visitors had approximately equal proportions of men (49%) and women (50%). For VFR visitors, the sample profile was skewed towards women (58%). These proportions are very similar to those observed in previous years.
- The age profile of VFR visitors was also younger than general Leisure visitors; 37% of VFR visitors were less than 45 years old, compared to 21% of Leisure visitors.
- The age profile of Leisure and VFR visitors was broadly consistent with the profile in 2017 and 2019.

Age and gender – Leisure and VFR



CQ7: What is your gender?

CQ8: Which of the following age groups are you in?

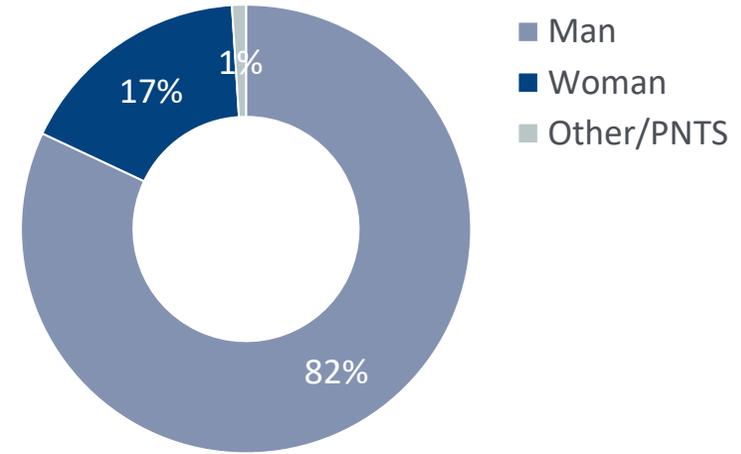
Base (All Leisure/VFR calibration visitors): Leisure 690, VFR 253

Visitor profile

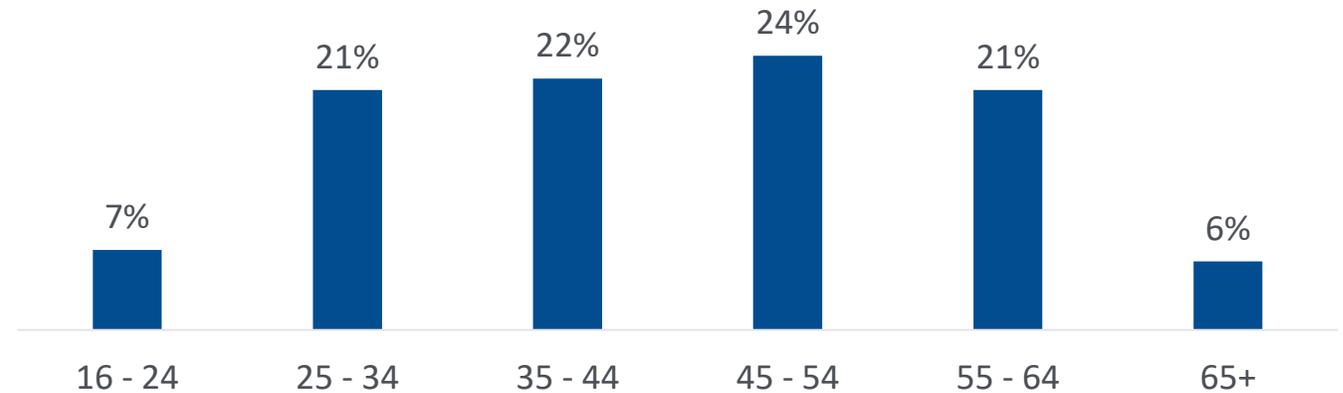
Demographics

- As in previous years, the Business visitor sample was predominantly male (82%). The proportion of female Business visitors in 2024 (17%) was lower than in 2019 (27%), but similar to 2017 (14%).
- There was a wide spread of age groups for Business visitors, with 51% aged 45 years or older and 49% under 45. The age profile of Business visitors in 2024 was consistent with the 2017 and 2019 waves of the survey.

Age and gender – Business



PNTS = prefer not to say



CQ7: What is your gender?

CQ8: Which of the following age groups are you in?

Base (All Business calibration): 396

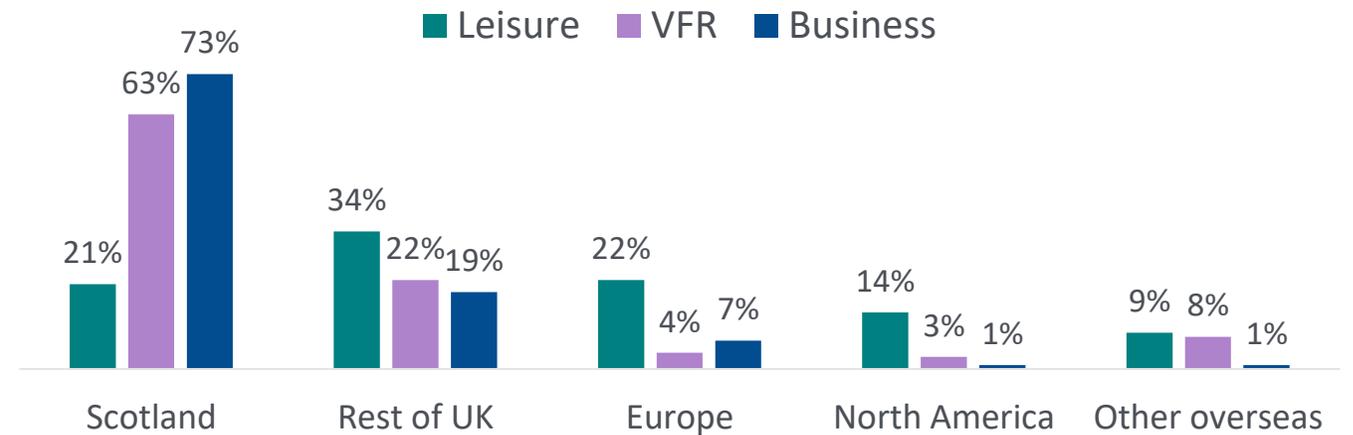
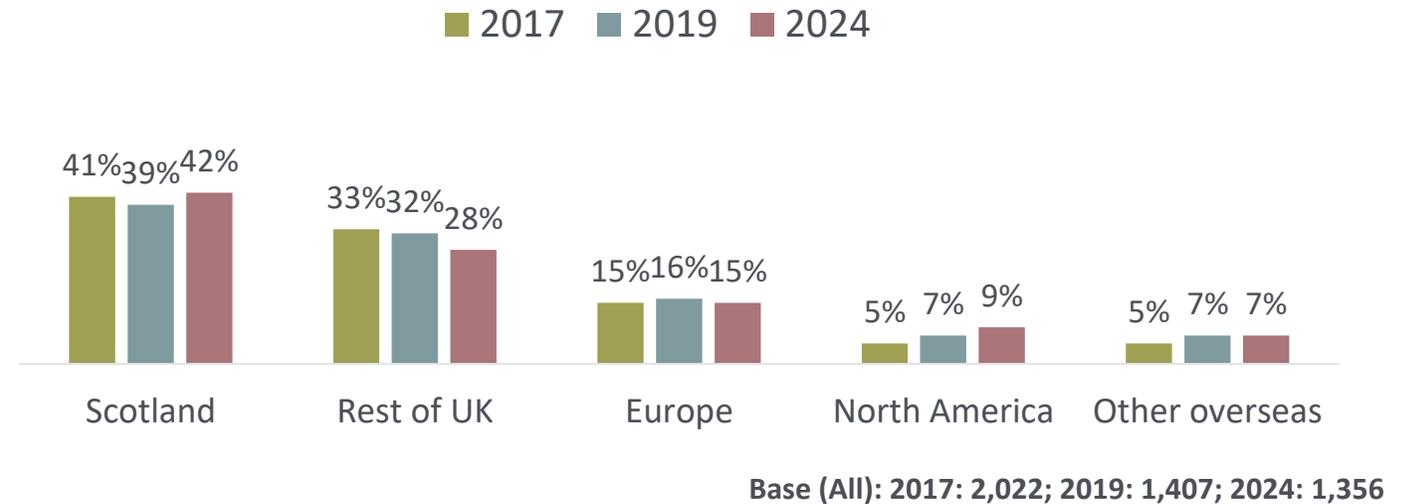
Visitor profile

Origin

- The majority of all visitors to Shetland in 2024 were from the UK (70%), with 42% from Scotland and 28% from the rest of the UK.
- Of the 30% overseas visitors, the largest proportion was from Europe (15%), with a further 9% from North America, 5% from Australia/New Zealand and 1% from other countries.
- In general, the origin profile of visitors in 2024 closely matched the profile in 2017 and 2019; however, the data suggests a declining proportion of visitors are coming from the rest of the UK, while an increasing proportion are coming from North America.
- As we would expect, amongst Leisure visitors the proportion of overseas visitors was higher (45%) and the proportion of visitors from Scotland was lower (21%) than for VFR or Business visitors. Both VFR and Business visitors were predominantly from Scotland.



Origin

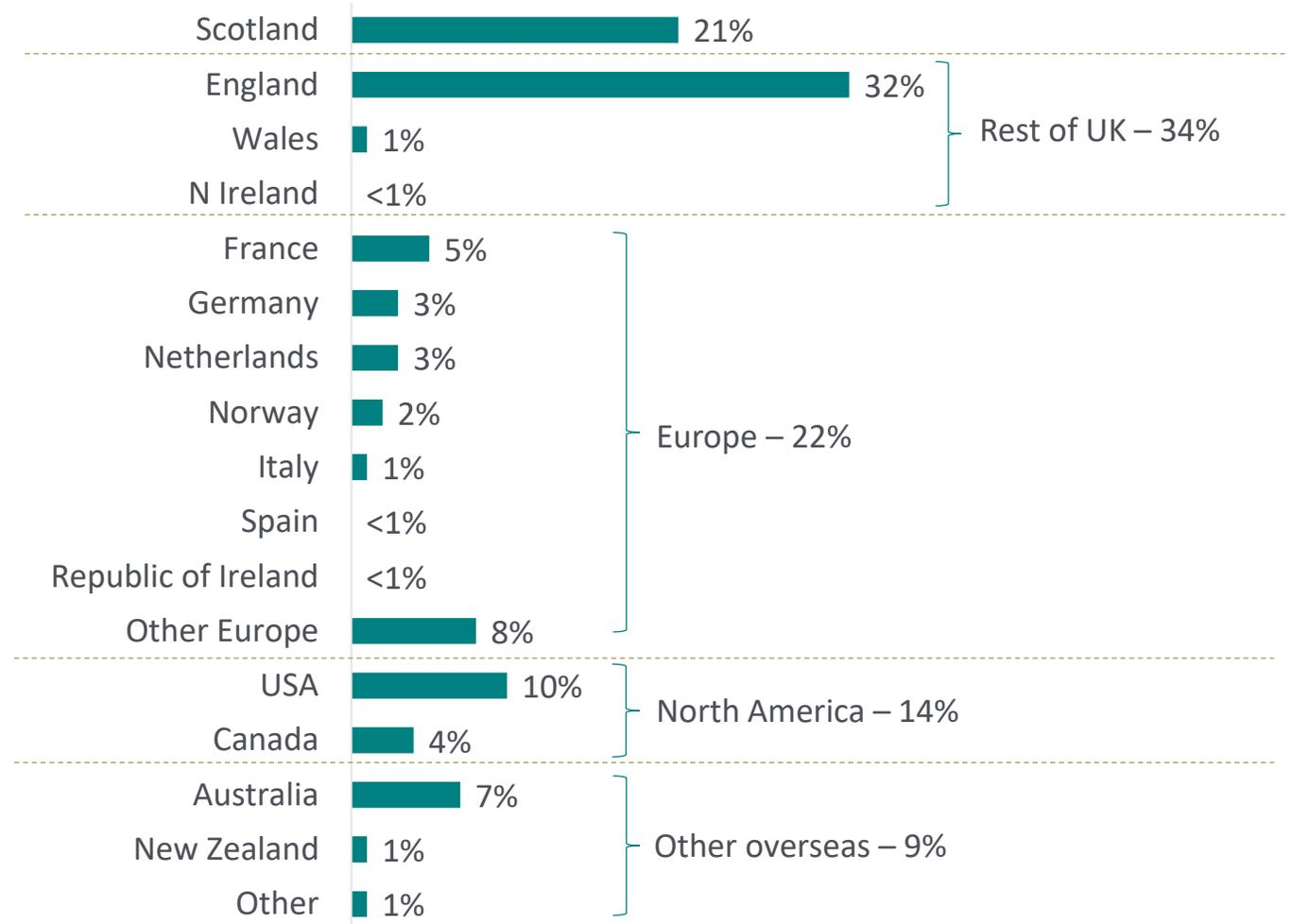


Visitor profile

Origin

- The largest individual country of origin for Leisure visitors to Shetland in 2024 was England (32%) followed by Scotland (21%).
- Outside of the UK, the largest market for Leisure visitors was Europe (22%). The most prevalent European countries were France (5%), Germany (3%) and the Netherlands (3%).
- The USA accounted for 10% of Leisure visitors, while 7% were from Australia.
- Comparing the origin profile of Leisure visitors in 2024 to 2017 and 2019 shows that the proportion of those from Scotland is consistent with 2019 (18%) and slightly lower than in 2017 (29%). The corresponding increase in overseas visitors seen from 2017 (34%) to 2019 (45%) has been maintained in 2024 (45%).
- European visitors had a younger age profile than visitors from other countries – 39% were aged under 45, compared to 25% of North American visitors and 21% of those from other overseas countries.

Origin – Leisure visitors

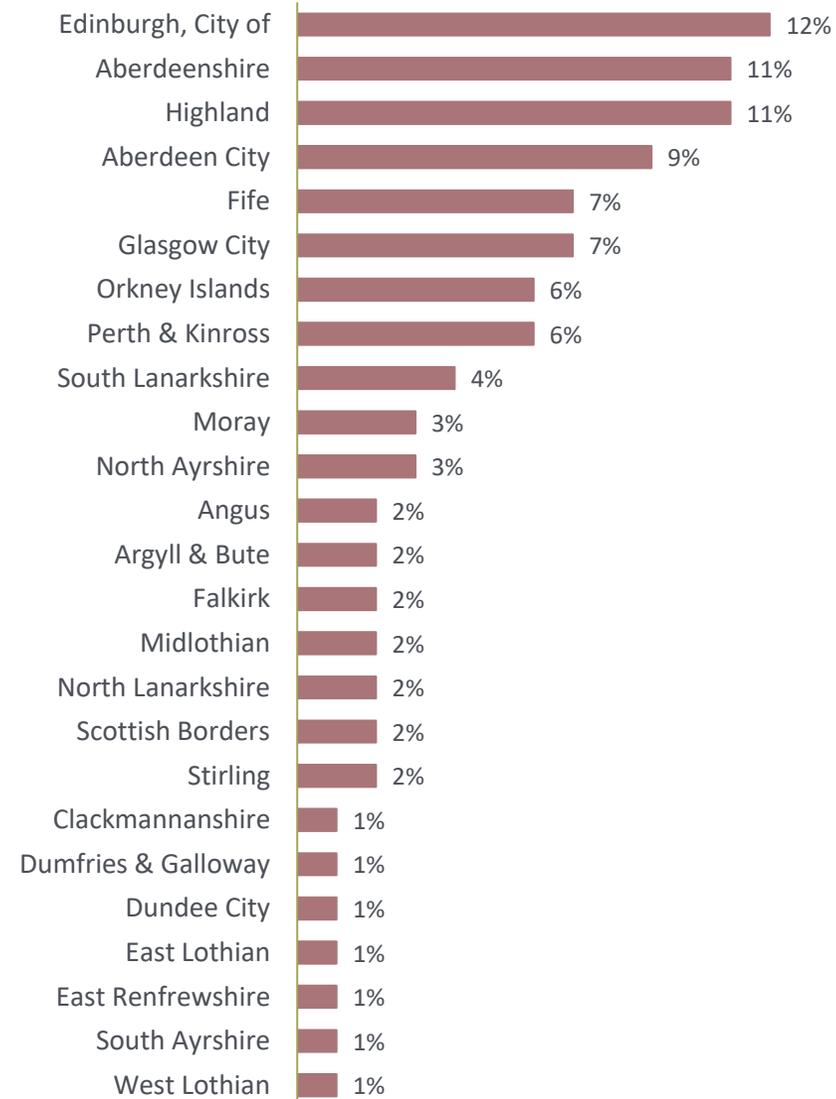


Visitor profile

Origin

- Visitors to Shetland from Scotland were widely dispersed geographically, with around one in ten coming from each of Edinburgh (12%), the Highlands (11%) and Aberdeenshire (11%).
- Edinburgh, Aberdeenshire and the Highlands were also the top Scotland origin locations in 2017 and 2019, while there have been some fluctuations in the proportion from Orkney (5% in 2017 and 12% in 2019).
- This profile of visitors in 2024 was very similar across Leisure, VFR and Business visitors, although a higher proportion of Business visitors (17%) came from Aberdeenshire, compared to Leisure (4%) and VFR (9%) visitors. Visitors from Edinburgh were more likely to be visiting Shetland for leisure purposes (19%) than for business (6%).

Origin – Scotland visitors



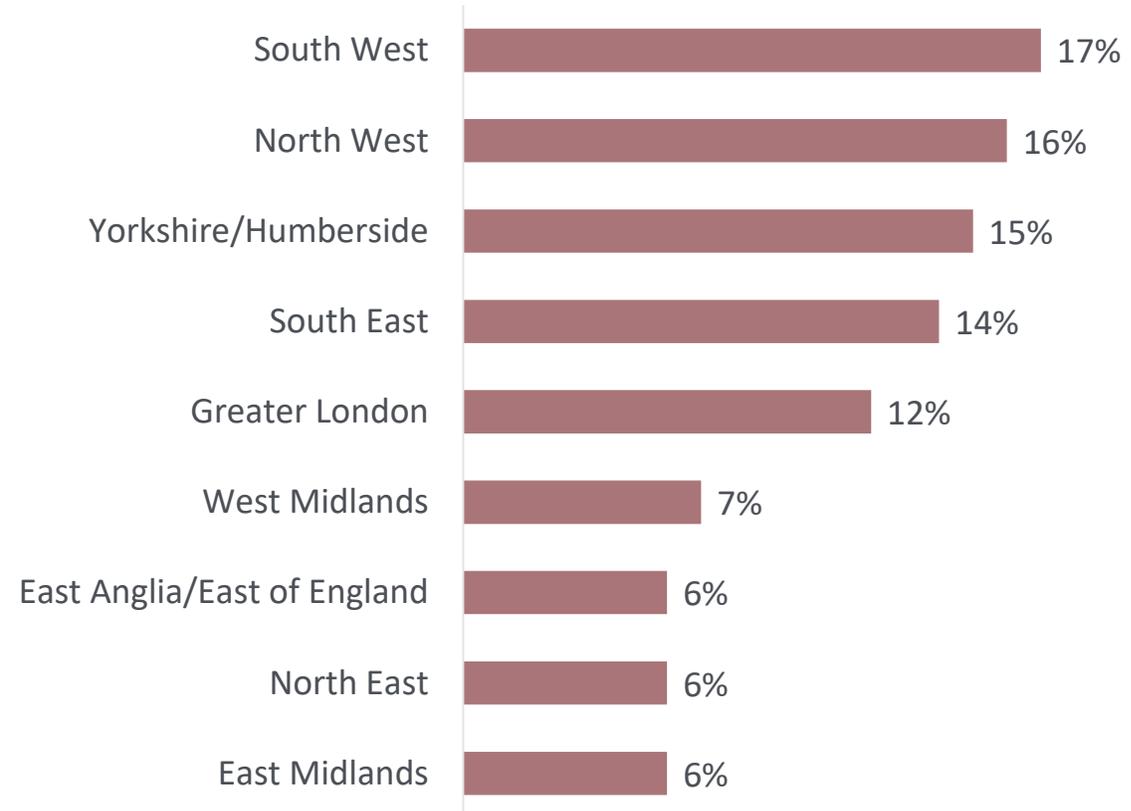
Locations reported by less than 1% are not shown

Visitor profile

Origin

- Visitors from England also came from a variety of regions.
- The top origin locations were the South West, the North West, and Yorkshire and Humberside.
- The increase in the proportion of visitors from London noted in 2019 (11%) compared to 2017 (6%) has been maintained in 2024.

Origin – England visitors

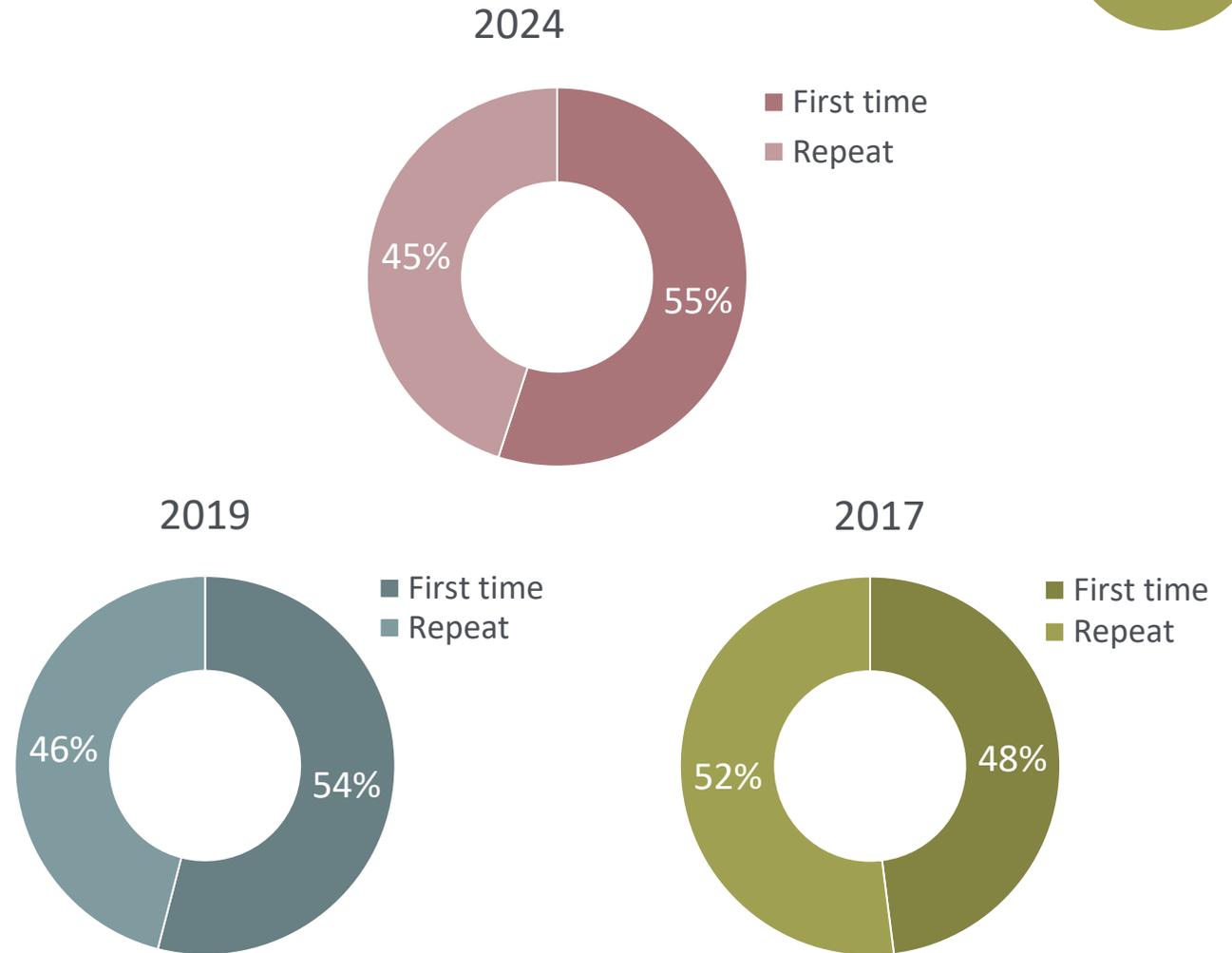


Visitor profile

First time/repeat visitors

- The largest proportion of visitors to Shetland in 2024 (55%) were first time visitors to the islands.
- This proportion is very similar to the data gathered in 2019 (54%) but higher than in 2017 (48%).
- A wide spread of frequency of previous visits was reported, with 12% reporting they had been to Shetland once before, and 11% saying they had visited 10+ times. As we might expect, those who had visited 10+ times previous were more likely to be Business (27%) or VFR (19%) visitors than Leisure (3%) visitors.
- Across the total sample, 6% of respondents previously lived on the islands; however, amongst VFR visitors 26% were previous islanders.

Number of times visited Shetland



Q10: Approximately how many times have you visited Shetland before your recent trip?

Base (All excluding rotational shift workers) 2017: 725; 2019: 364; 2024: 486

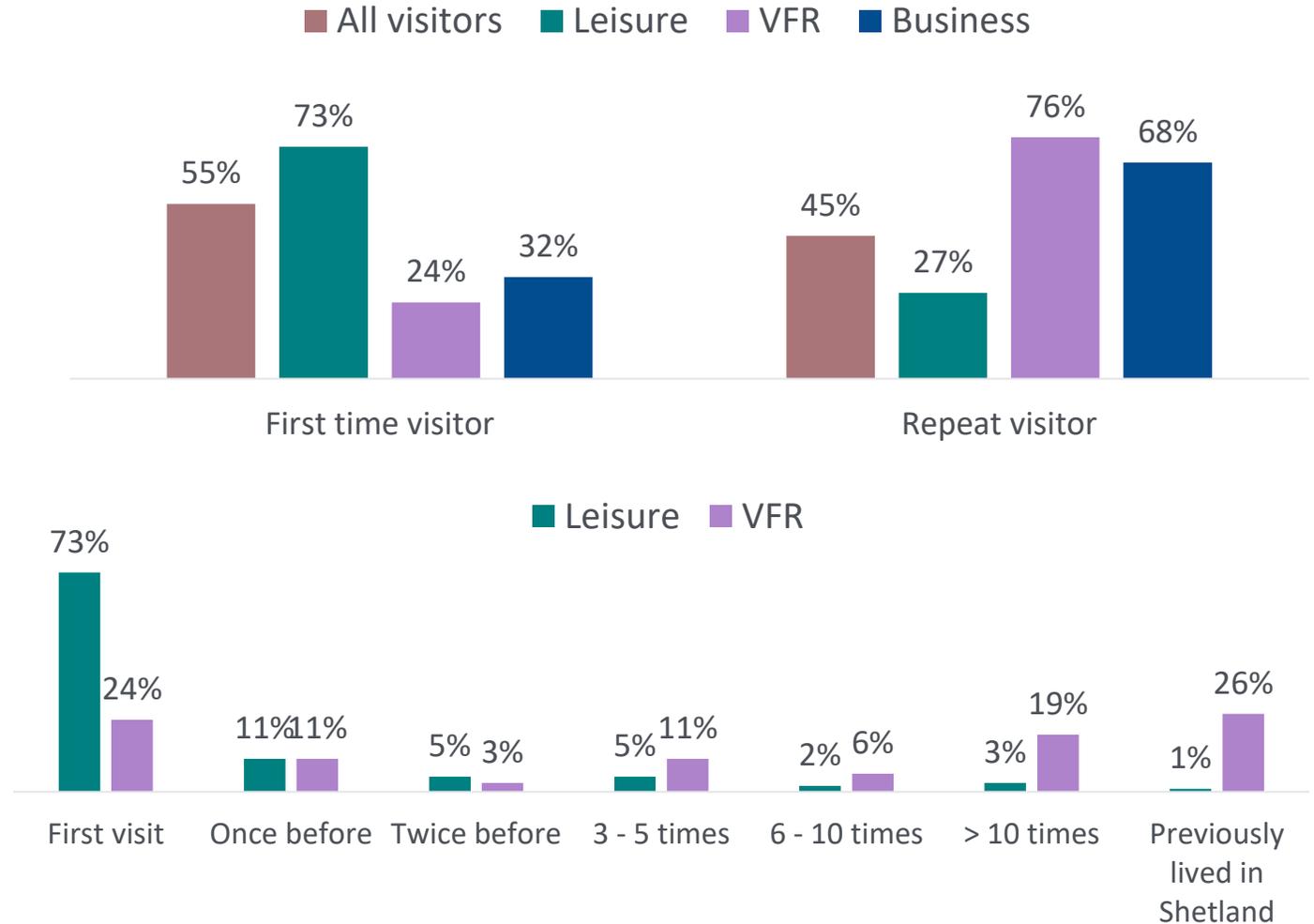
Visitor profile

First time/repeat visitors

- Almost three quarters of Leisure visitors were first time visitors to Shetland, while the majority of VFR (76%) and Business (68%) visitors had been before.
- The higher proportion of Leisure visitors who were visiting Shetland for the first time noted in 2019 (77%) compared to 2017 (64%) was maintained in 2024 (73%).
- Amongst Leisure visitors, those from overseas were more likely to be first time visitors (87%) than those from Scotland (56%) or the rest of UK (64%).



Number of times visited Shetland



Q10: Approximately how many times have you visited Shetland before your recent trip?

Base (All excluding rotational shift workers)
Total 486; Leisure 350; VFR 82; Business 53

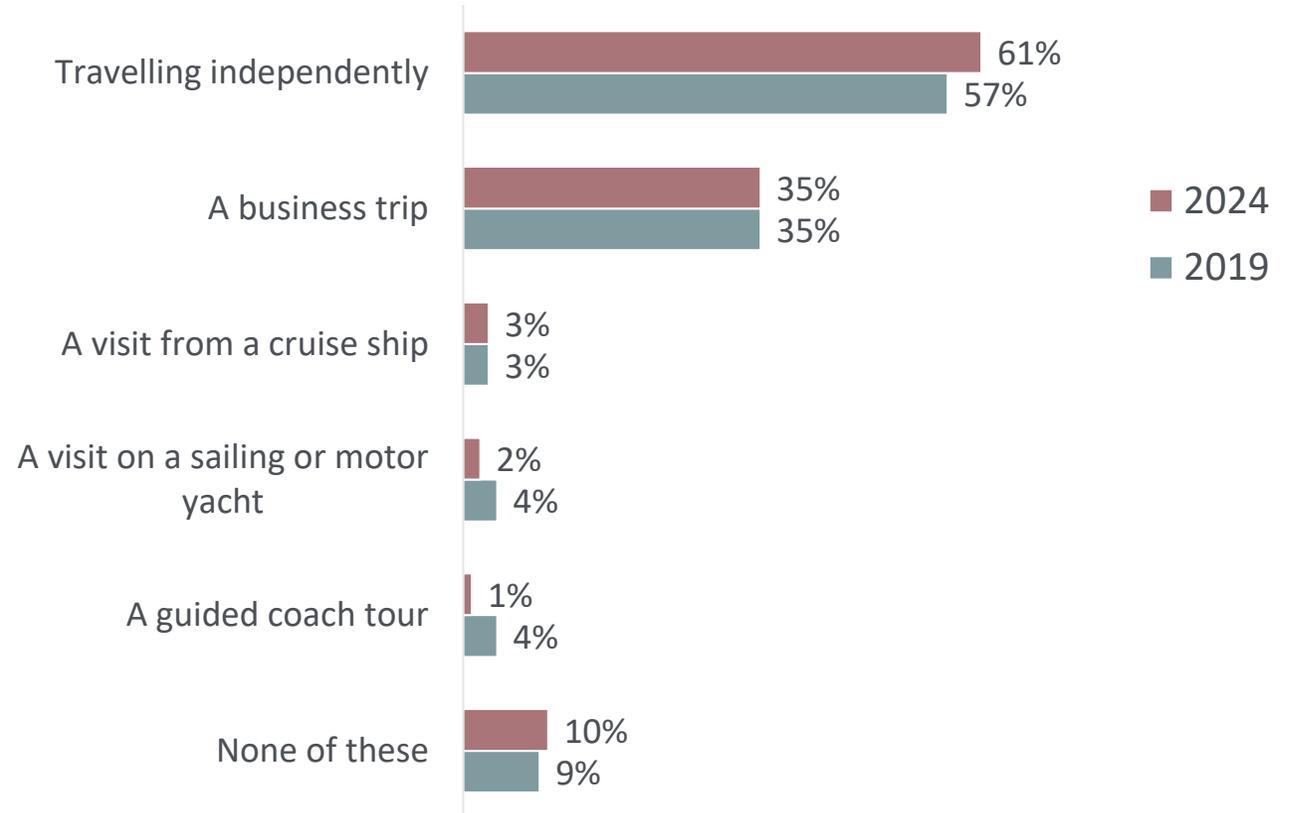
Visitor profile

Previous visits

- Respondents who had been to Shetland before were asked if their previous visit/s had involved any of the types of trip detailed opposite.
- Three fifths (61%) of repeat visitors reported that they had previously travelled independently to Shetland, while just over one third (35%) had previously been to Shetland on a business trip.
- These proportions were very similar to the findings from 2019.
- As might be expected, a higher proportion of Business visitors reported that they has been previously on a business trip (88%) than Leisure (14%) or VFR (3%) visitors. The majority of Leisure (77%) and VFR (67%) visitors had previously visited Shetland independently.



Types of trip for previous visits to Shetland



Q11/12: Have any of your previous visits to Shetland involved the following types of trip?

Base (Repeat visitors) 2019: 125;
2024: 152 24

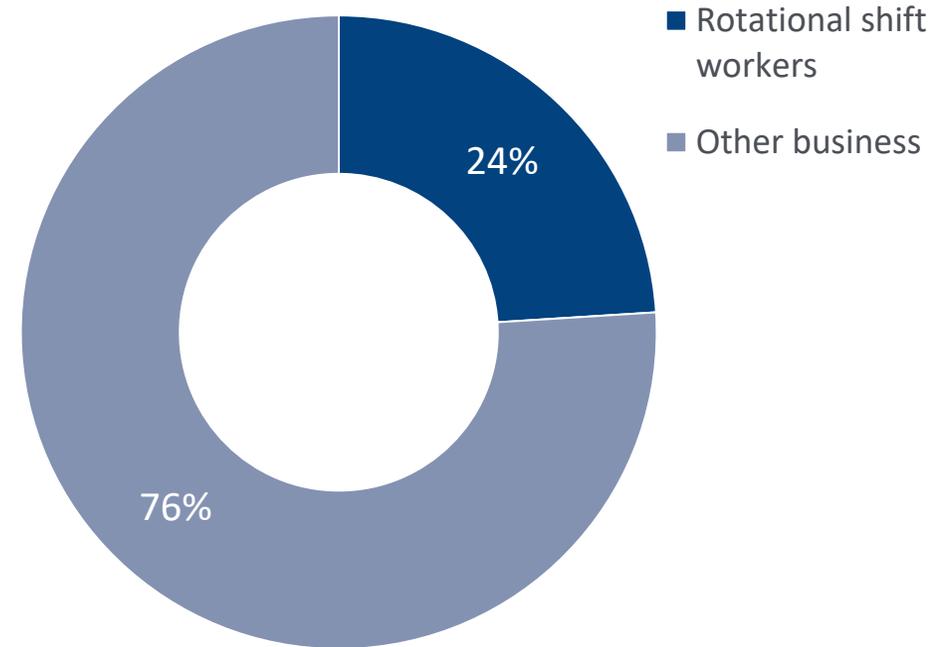
Visitor profile

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 less than one quarter of business respondents stated that they were visiting on a rotational shift pattern.
- This proportion is consistent with 2017 (24%) but lower than in 2019 (37%).

Rotational shift workers

progressive



CQ6: Was your visit to Shetland to work for an extended period of time, but you normally live on the mainland, e.g. you are on a rotational shift pattern?

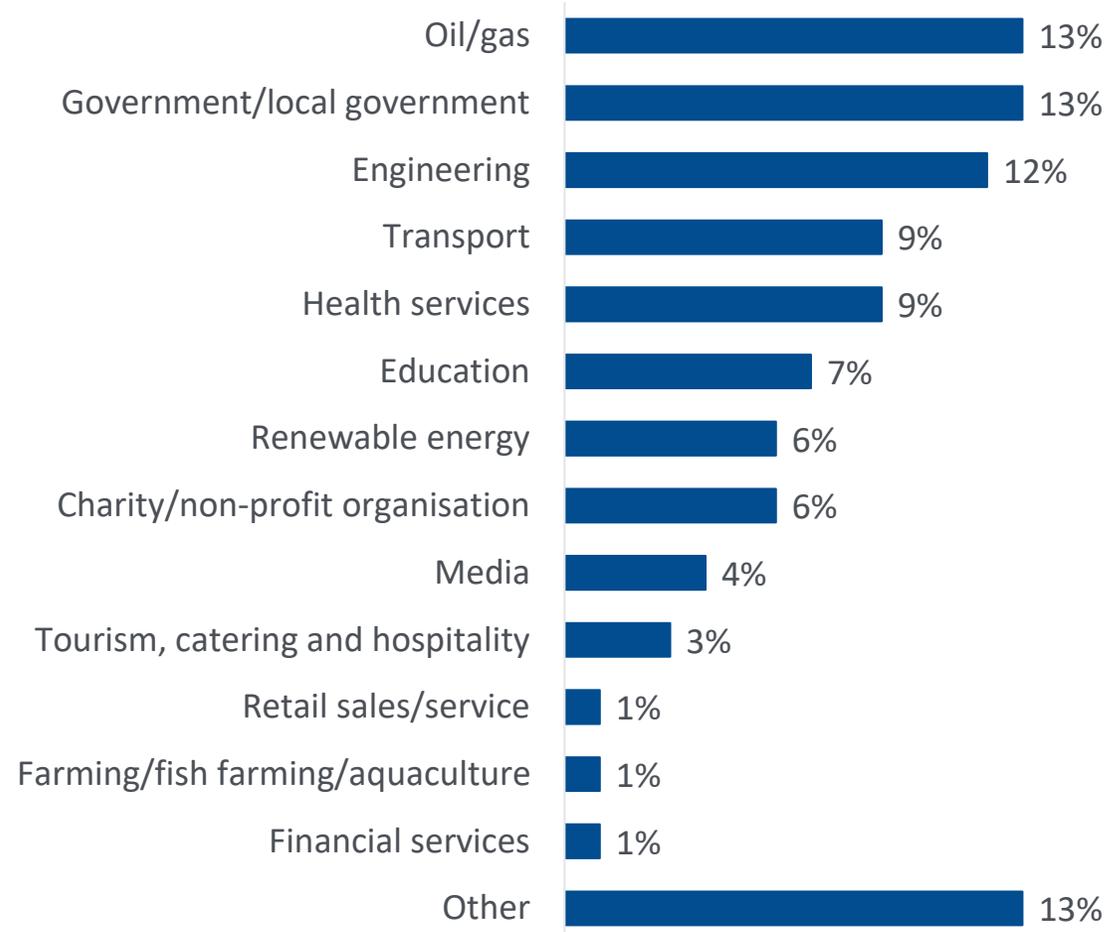
Base (All Business calibration): 396 25

Visitor profile

Business

- A wide range of sectors were cited by Business visitors, the most prevalent being oil and gas and government/local government, followed by engineering, transport and health services.
- Just over one in ten business visitors (16 respondents) stated another sector not listed. These included archaeologists (3 respondents), and a variety of other individual sectors.

Business sector



Visitor profile

Summary



- The profile of visitors to Shetland in 2024 was very similar to 2019, just over half of respondents visiting for leisure purposes, a quarter on a business trip and a fifth visiting friends or relatives.
- The age profile was skewed to older age groups with more than half (53%) aged over 55 years old. This was particularly true of Leisure visitors, almost two thirds of whom were aged over 55.
- Similar to the 2017 and 2019 waves of the survey, the majority of visitors to Shetland in 2024 (70%) came from the UK – with 42% from Scotland and 28% from the rest of the UK.
- Leisure visitors came from a much more widespread range of countries; whilst most were from the UK (21% Scotland; 34% rest of UK), 45% were from overseas, with 22% from Europe, 14% from North America and 8% from Australia/New Zealand.
- These findings very closely replicated the profile of visitors in previous years, although there appears to be an increasing trend in visitors coming from North America.
- Almost three quarters of Leisure visitors were visiting Shetland for the first time (73%). The proportion of first time Leisure visitors was very similar in 2019 (77%).
- Consistent with previous waves, VFR (76%) and Business visitors (68%) were more likely to be repeat visitors to the islands.

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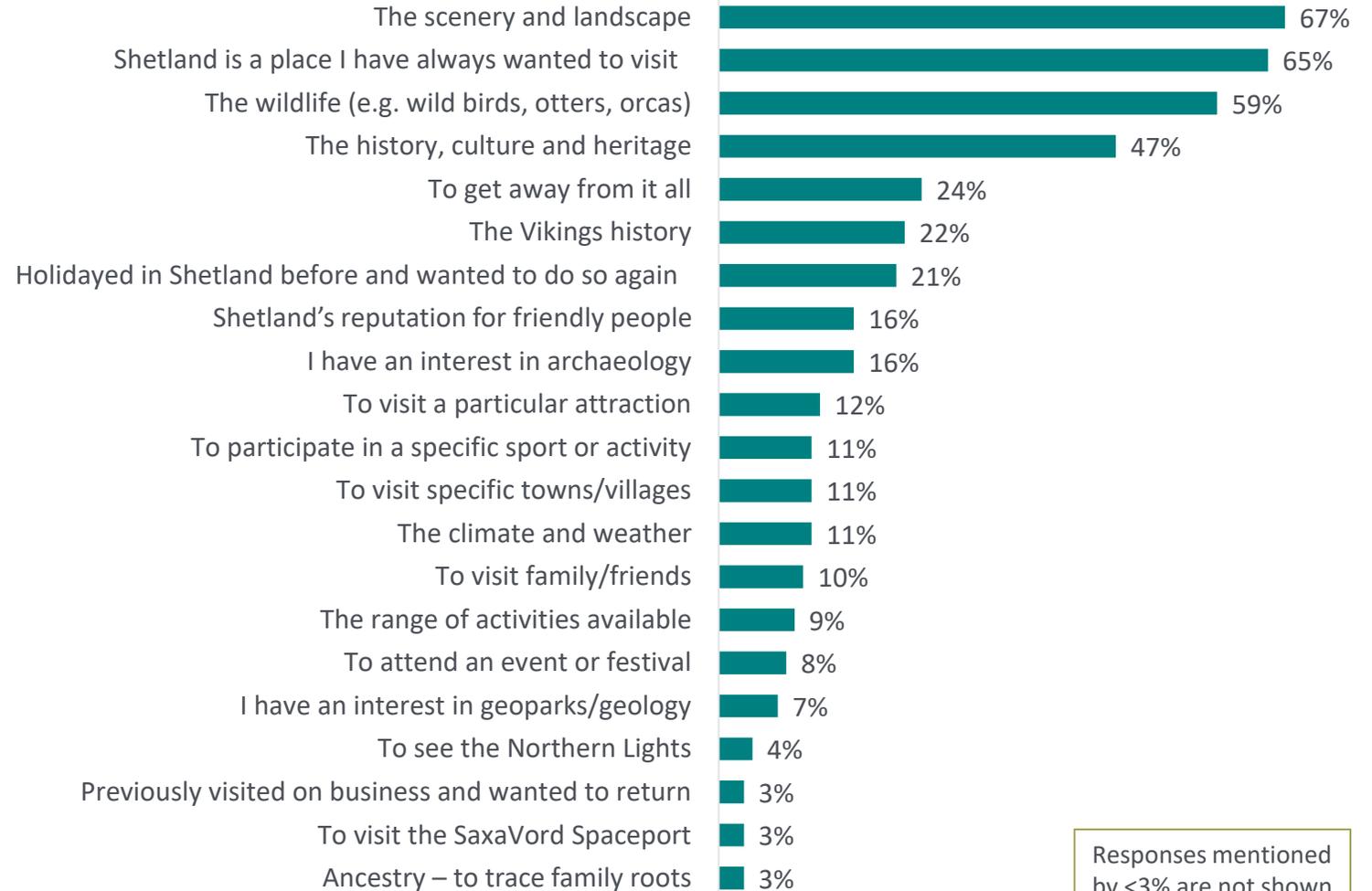
Visitor Journey

Visitor journey

Motivations

- The key reasons for visiting Shetland cited by Leisure visitors were the scenery and landscape (67%), the wildlife (59%) and the history and culture (47%), with almost two thirds (65%) stating that they had 'always wanted' to visit Shetland.
- Getting away from it all was also a key reason for visiting – being mentioned by one quarter of Leisure visitors.
- These reasons for visiting Shetland were also the key motivations in 2017 and 2019, although wildlife was a new option available in 2024, so did not feature in previous waves of research.
- The history and culture of Shetland and Viking history were more likely to be mentioned by overseas Leisure visitors (54% and 30% respectively) than visitors from Scotland (34% and 9%). Overseas visitors also tended to be more interested in archaeology (22%) than visitors from Scotland (6%).
- The scenery and landscape was more often mentioned by visitors from overseas (73%) or the rest of the UK (71%) than visitors from Scotland (50%).

Reasons for visiting Shetland – Leisure visitors



Responses mentioned by <3% are not shown

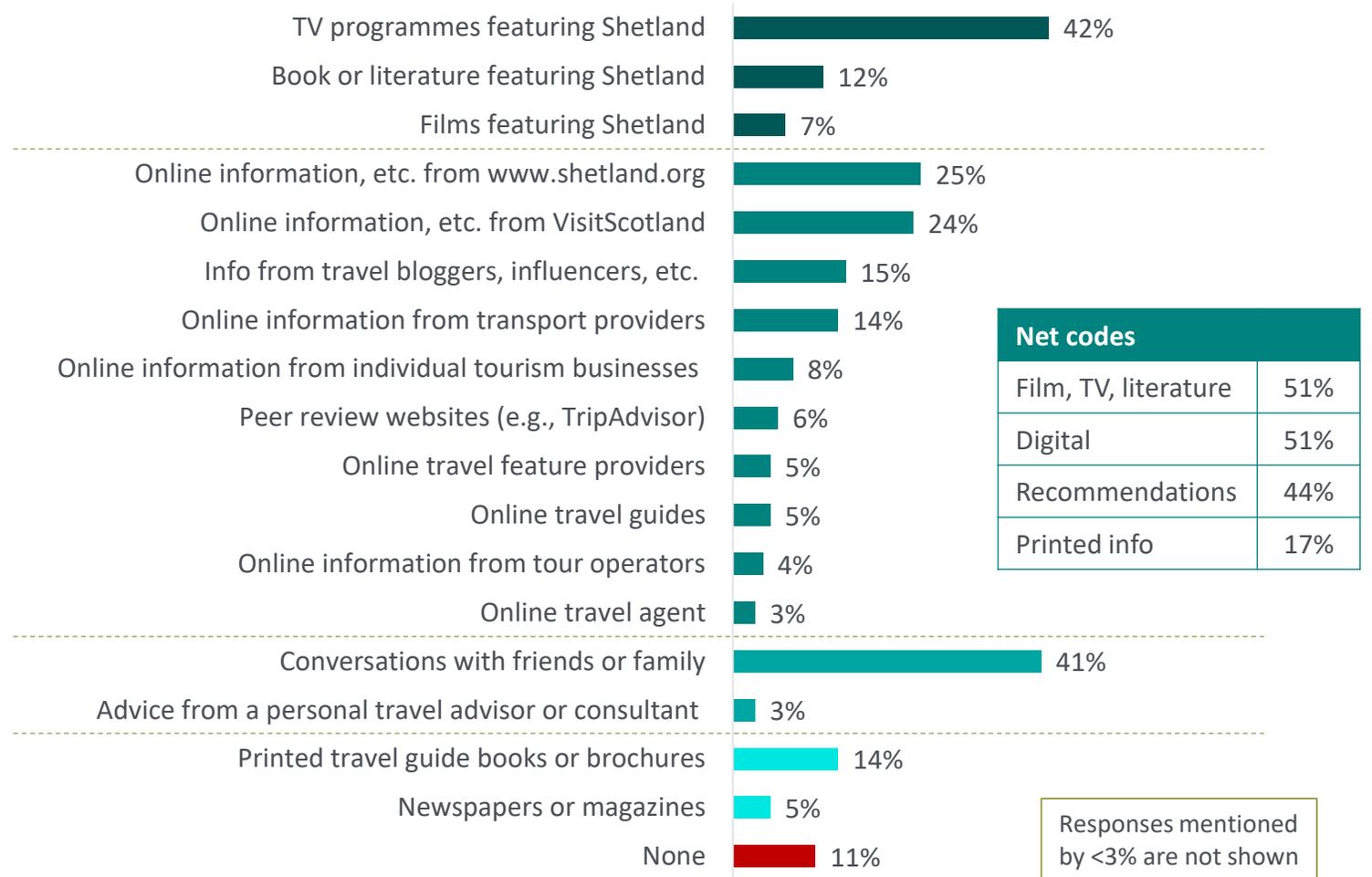
Visitor journey

Inspiration

- Leisure visitors were inspired to choose Shetland for their short break or holiday by a wide variety of sources, with around half citing cultural sources, such as films and TV, and/or digital sources, such as websites and online providers.
- The largest individual sources were TV programmes (42%) and conversations with family and friends (41%), whilst around a quarter reported visiting www.Shetland.org and/or www.visitscotland.co.uk.
- By far the main TV programme cited was the BBC's detective series Shetland, mentioned by almost all (92%) of those who said they were inspired by a TV programme. Indeed, the Shetland series was also the top answer for those inspired by a book (61%) and by a film (60%).
- Personal recommendations were more often mentioned by Scotland visitors (69%) than those from the rest of the UK (35%) or overseas (38%). Overseas visitors were more likely to be inspired by printed information (24%) compared to visitors from Scotland (6%), and more often used digital sources (61%) than visitors from Scotland (44%) or the rest of the UK (41%).
- First time visitors were more likely to be inspired by a range of sources, including TV programmes (49%, vs 23% repeat visitors), online information from VisitScotland (29%, vs 12%) and information from travel bloggers/influencers (19%, vs 3%).



Inspiration for visiting Shetland – Leisure visitors



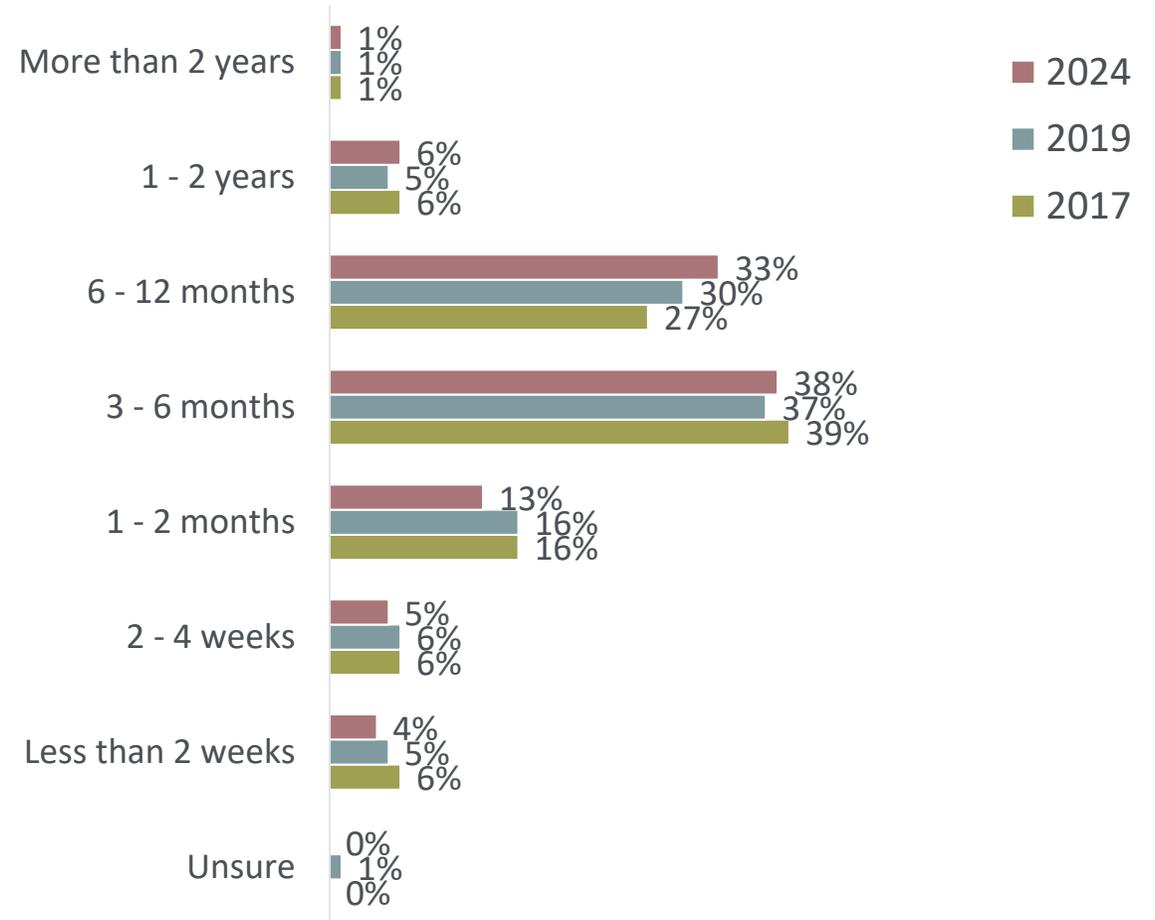
Q2: Thinking back to the moment when you were considering your destination for this holiday or short break, which, if any, of these sources of inspiration helped you decide on Shetland?

Visitor journey

Planning

- Leisure and VFR visitors were asked how far in advance they had started planning their trip. For most, planning took place between three and 12 months before travel, with only one in ten reporting their planning started within a month of travel.
- The pattern of travel planning in 2024 is very similar to 2017 and 2019, although there appears to be an increasing trend in planning six to 12 months in advance.
- The level of advance planning varied by visitor type, with VFR visitors more likely to plan their trip closer to departure. Detailed data for Leisure and VFR visitors can be found over.

How far in advance did you plan your trip?



Q3: 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?

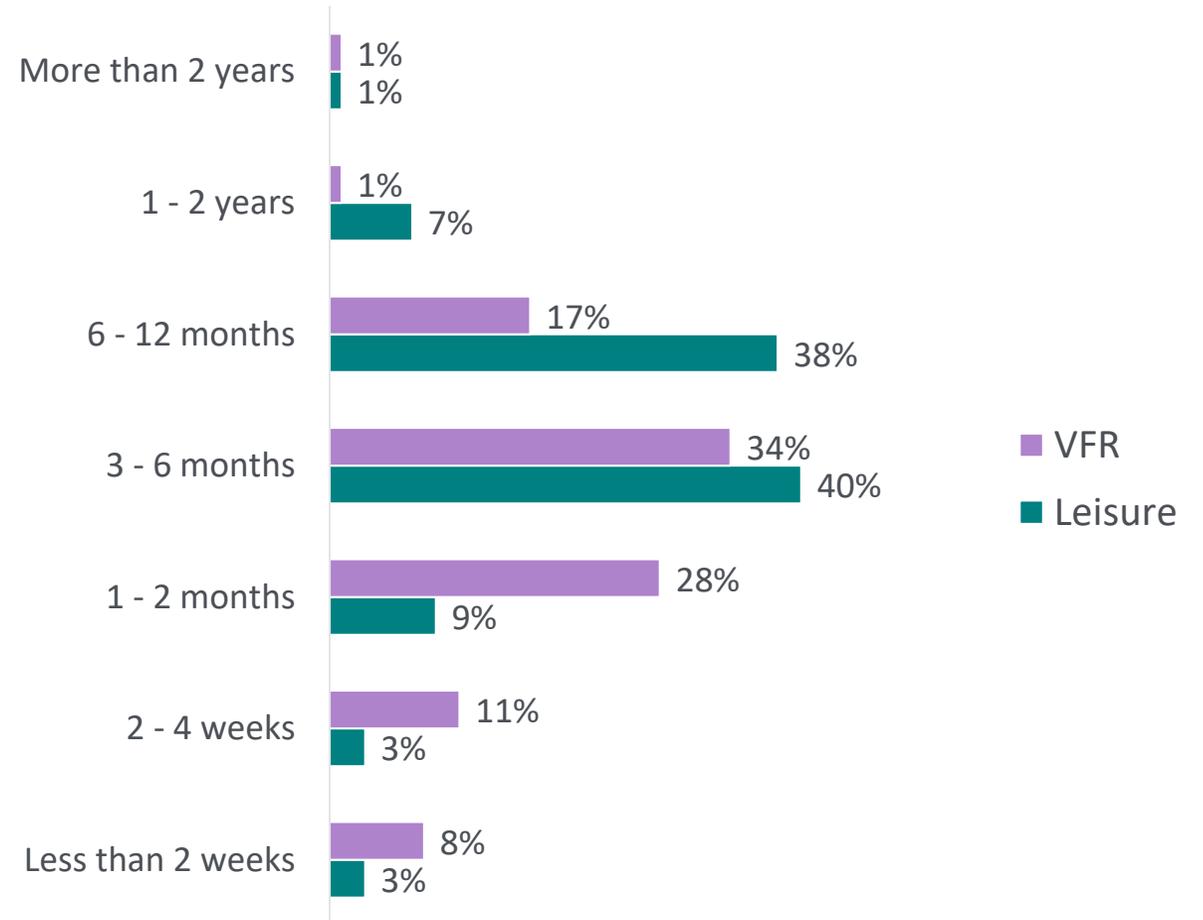
Base (Leisure/VFR visitors) 2017: 599, 2019: 318, 2024: 432 31

Visitor journey

Planning

- Leisure visitors showed the highest levels of advance planning – 45% planned more than six months before their visit and 40% started their planning three to six months in advance.
- VFR visitors demonstrated less advance planning than Leisure visitors – only 19% planned more than six months in advance. Indeed, 19% VFR visitors started the process within a month of travel, and a further 28% one to two months before.
- The pattern of response across the two visitor types was similar in 2017 to 2019.

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



Q3: 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?

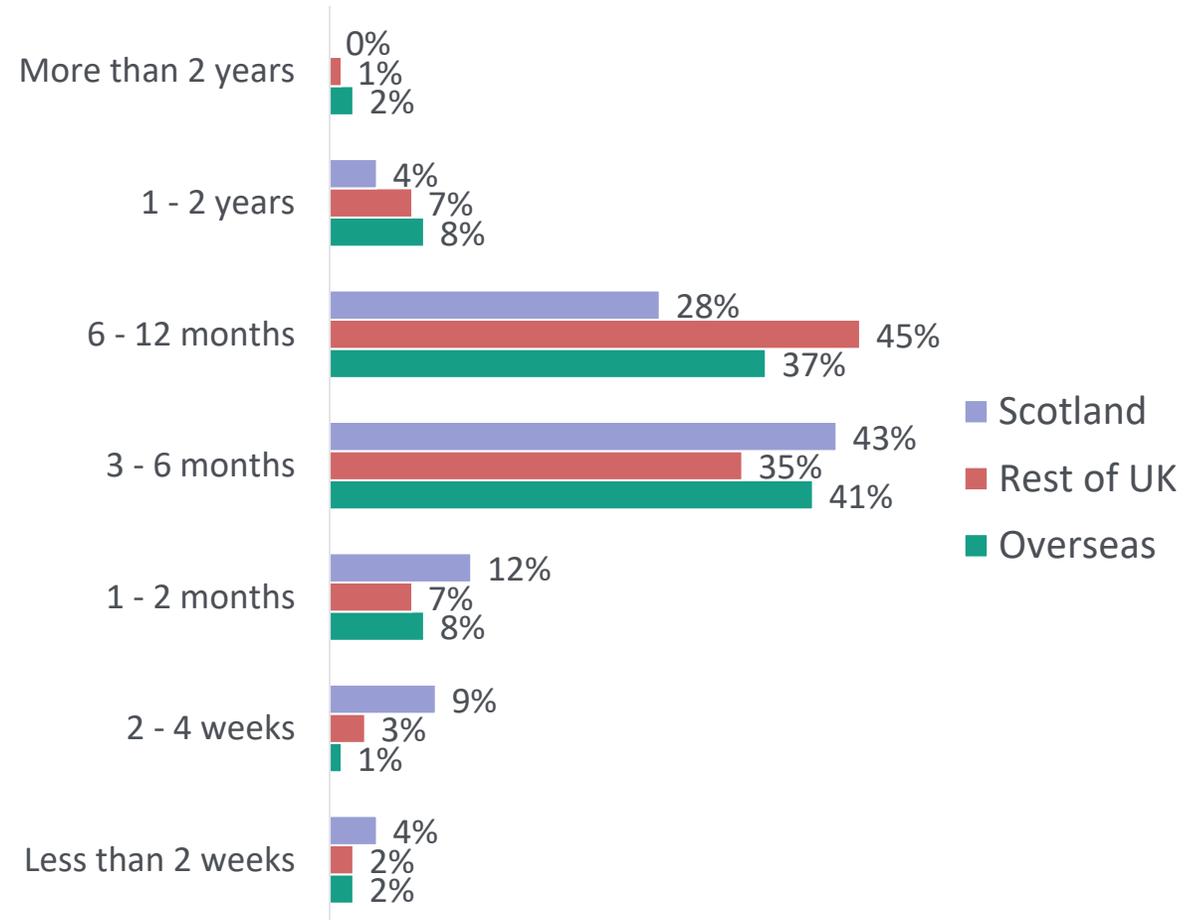
Base (Leisure/VFR visitors):
Leisure 350; VFR 82

Visitor journey

Planning

- Leisure visitors from Scotland were more likely to start planning within two months of travel (24%), than those from the rest of the UK (12%) or overseas (12%).
- Visitors from the rest of the UK and overseas showed a very similar pattern of response; most planned their trip between three and 12 months in advance – rest of UK visitors (79%) and overseas visitors (79%).

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



Q3: 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?

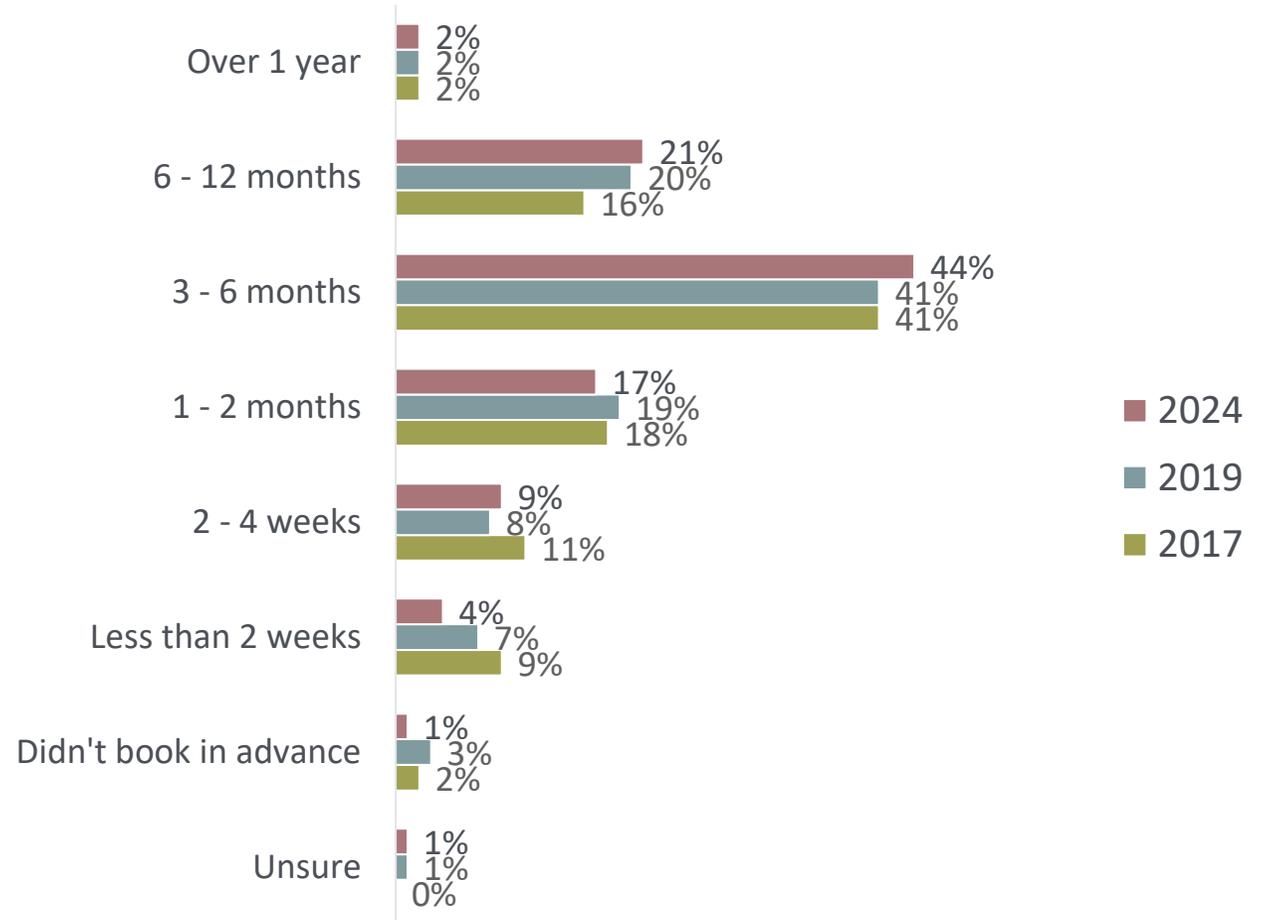
Base (All Leisure): Scotland 68; rest of UK 109; overseas 173

Visitor journey

Booking

- The pattern of data in terms of booking the trip was very similar to planning – the majority overall (68%) booked more than three months in advance, with 30% booking within three months of travel.
- Although 38% planned their trip more than six months before travel, only 23% 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.
- Although the timing of trip bookings in 2024 was similar to 2017 and 2019, the data does suggest an increasing trend in booking more than three months before travel.
- Again, differences were noted between Leisure and VFR visitors, as noted over.

How far in advance did you book your trip?



Q4: How far in advance did you book your trip? i.e. how much time was there between booking the trip and actually going?

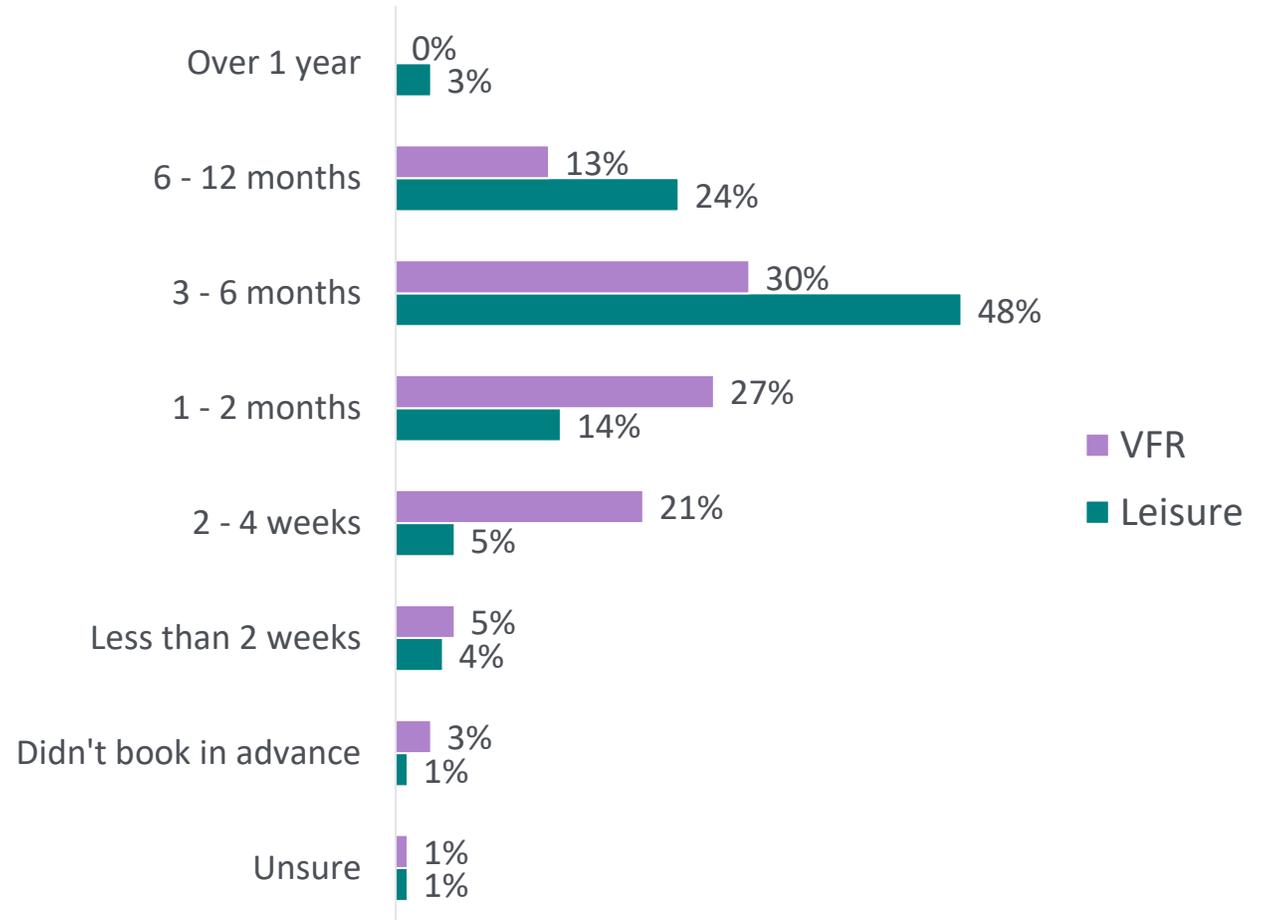
Base (Leisure/VFR visitors) 2017: 599, 2019: 318, 2024: 433 34

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 – 75% booked more than three months before visiting.
- The sample of VFR visitors had more of a spread of advance planners and spontaneous travellers – 29% booked within a month or did not book at all, 27% booked one to two months in advance and 43% booked ahead by three months or more.
- These patterns of response were also seen in previous waves of research for Leisure and VFR visitors.

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



Q4: How far in advance did you book your trip? i.e. how much time was there between booking the trip and actually going?

Base (Leisure/VFR visitors):
Leisure 350; VFR 82

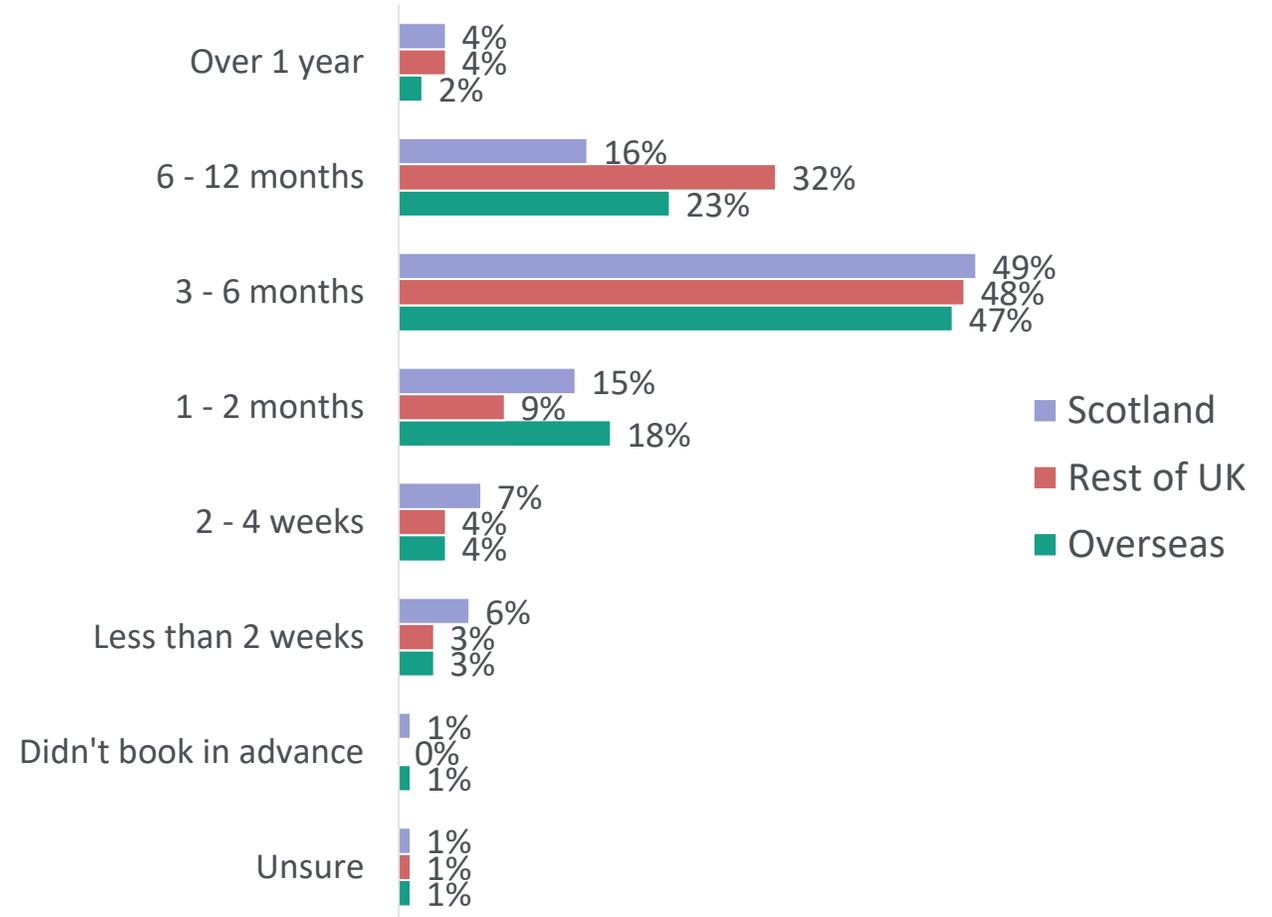
Visitor journey

Booking

- The timing of booking their trip was fairly consistent for visitors from Scotland, the rest of UK and overseas – most of the differences were not statistically significant, with the exception of rest of UK visitors being more likely to book six to 12 months in advance (32%) compared to Scotland visitors (16%).
- However, regardless of where the visitor was from, the typical timing of booking was three to six months before the trip.
- The booking patterns for visitors from Scotland, the rest of the UK and overseas were similar to the previous waves of research in 2017 and 2019.



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



Q4: How far in advance did you book your trip? i.e. how much time was there between booking the trip and actually going?

Base (All Leisure): Scotland 68; rest of UK 109; overseas 173

Visitor journey

Booking

- All visitors who stayed in paid for accommodation were asked how they booked. The largest single proportion of visitors (44%) reported that they booked directly with the accommodation provider.
- In total, 30% booked their accommodation using a travel agent or intermediary, most commonly an online only travel agent, such as booking.com (21%). Online marketplaces, such as Airbnb, were mentioned by 1 in 6 of those who stayed in paid for accommodation.
- Direct bookings with accommodation providers have remained consistent with 2017 (43%) and 2019 (47%). It's not possible to directly compare other ways of booking to previous waves due to changes in the wording of the response codes, however, a similar proportion mentioned an online travel/booking agency in 2019 (27%) to an online travel agent in 2024 (21%).
- Only a very small minority (2%) reported that they did not book accommodation in advance in 2024, which continues the downward trend in people not booking in advance from 2017 (18%) and 2019 (5%).

Method of booking accommodation



Q19: Which of the following methods did you use to book your accommodation for your trip to Shetland?

Base (All who stayed in paid accommodation): 360

Visitor journey

Booking

- Amongst Leisure visitors, the most common method of booking accommodation was directly with the provider (45%). In total, 35% used a travel agent, most often an online only travel agent (25%).
- Due to very small base sizes for Business and VFR visitors, comparisons are limited, however, VFR visitors were the most likely to book directly with the provider (69%).
- Amongst Leisure visitors, visitors aged 16 to 44 (43%) and 45 to 64 (28%) were more likely to have booked directly through an online only travel agent than those aged 65+ (15%).
- Leisure visitors from Europe (55%) were more likely to book through a travel agent than those from Scotland (25%) or the rest of the UK (28%).

Method of booking accommodation – Leisure visitors



Q19: Which of the following methods did you use to book your accommodation for your trip to Shetland?

Base (Leisure visitors who stayed in paid accommodation): 285

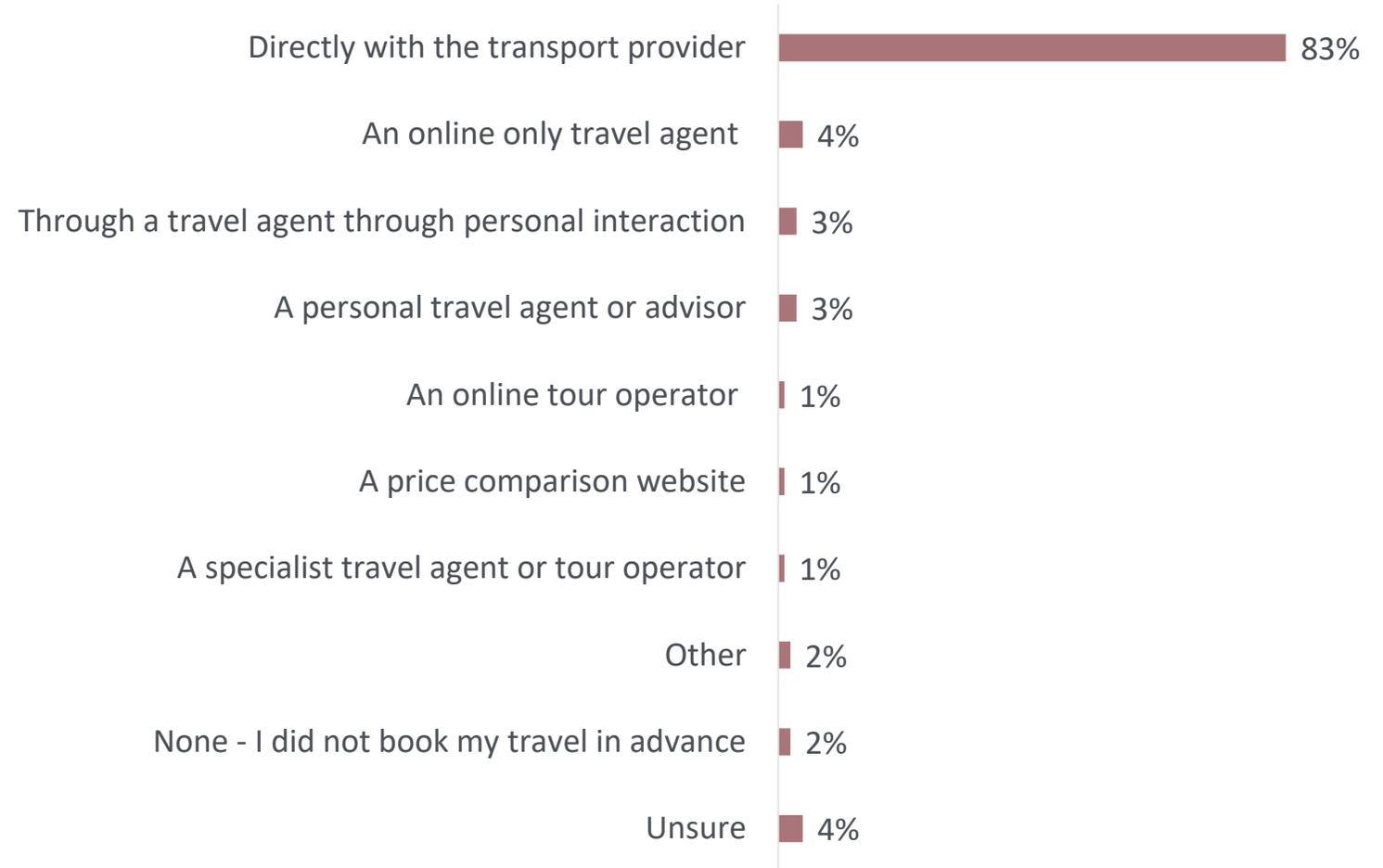
Visitor journey

Booking

- The large majority of visitors (83%) reported that their transport to Shetland was booked directly with the transport provider. In total, 11% used a travel intermediary, such as an online travel agent (4%), a travel agent in person (3%) or a personal travel agent (3%).
- Direct bookings with transport providers were particularly high amongst VFR (94%) and Leisure visitors (86%). Business visitors were less likely to book directly (64%) although for this group it was still the primary transport booking method*.
- Booking directly with the transport provider was also the most popular way of booking transport in 2017 (76%) and 2019 (77%), although fewer booked this way in previous years.

*Note: a relatively high proportion of business visitors (16%) did not know how their transport was booked.

Method of booking transport



Q20: Which of the following methods did you use to book your travel to Shetland for your trip?

Visitor journey

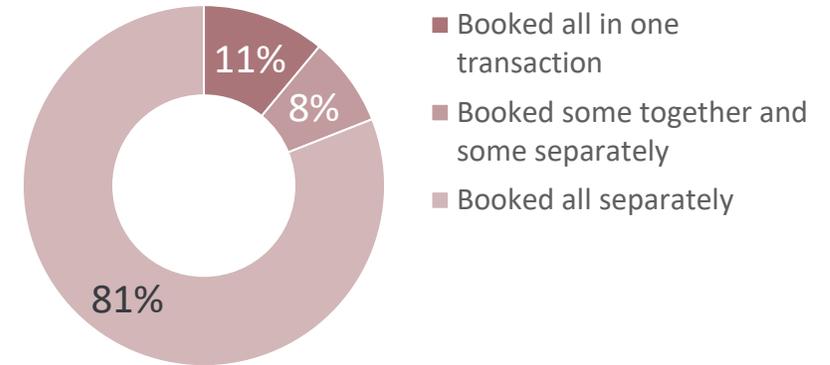
Booking

- Around one in five visitors overall (19%) reported that they booked all (11%) or some (8%) of their accommodation and travel to Shetland together in one transaction, while the majority (81%) booked these separately.
- These findings are very similar to the data gathered in 2019, when 12% booked their accommodation and travel in one transaction and 82% booked them separately.
- Booking travel and accommodation separately was prevalent regardless of whether respondents were Leisure, VFR or Business visitors.
- There were no significant differences in booking accommodation and travel together or separately by country of origin.

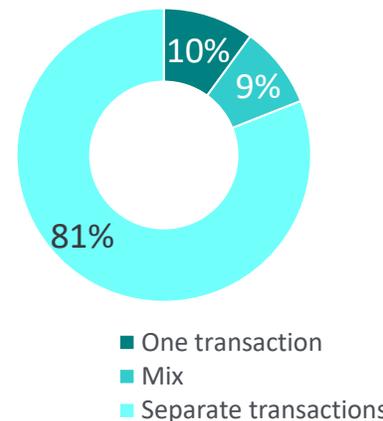


Did you book accommodation and travel in one transaction?

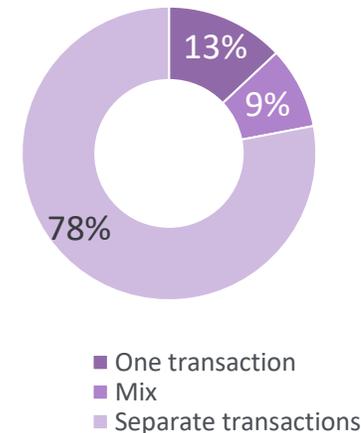
All visitors



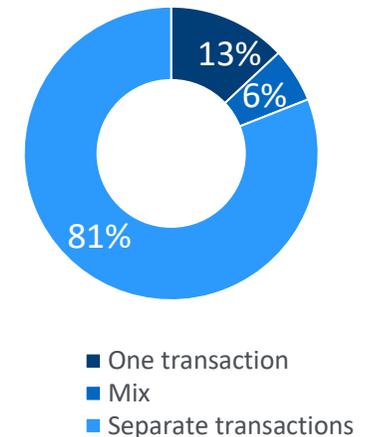
Leisure



VFR



Business



Q21: Did you book your travel and accommodation together in one transaction or separately in more than one transaction?

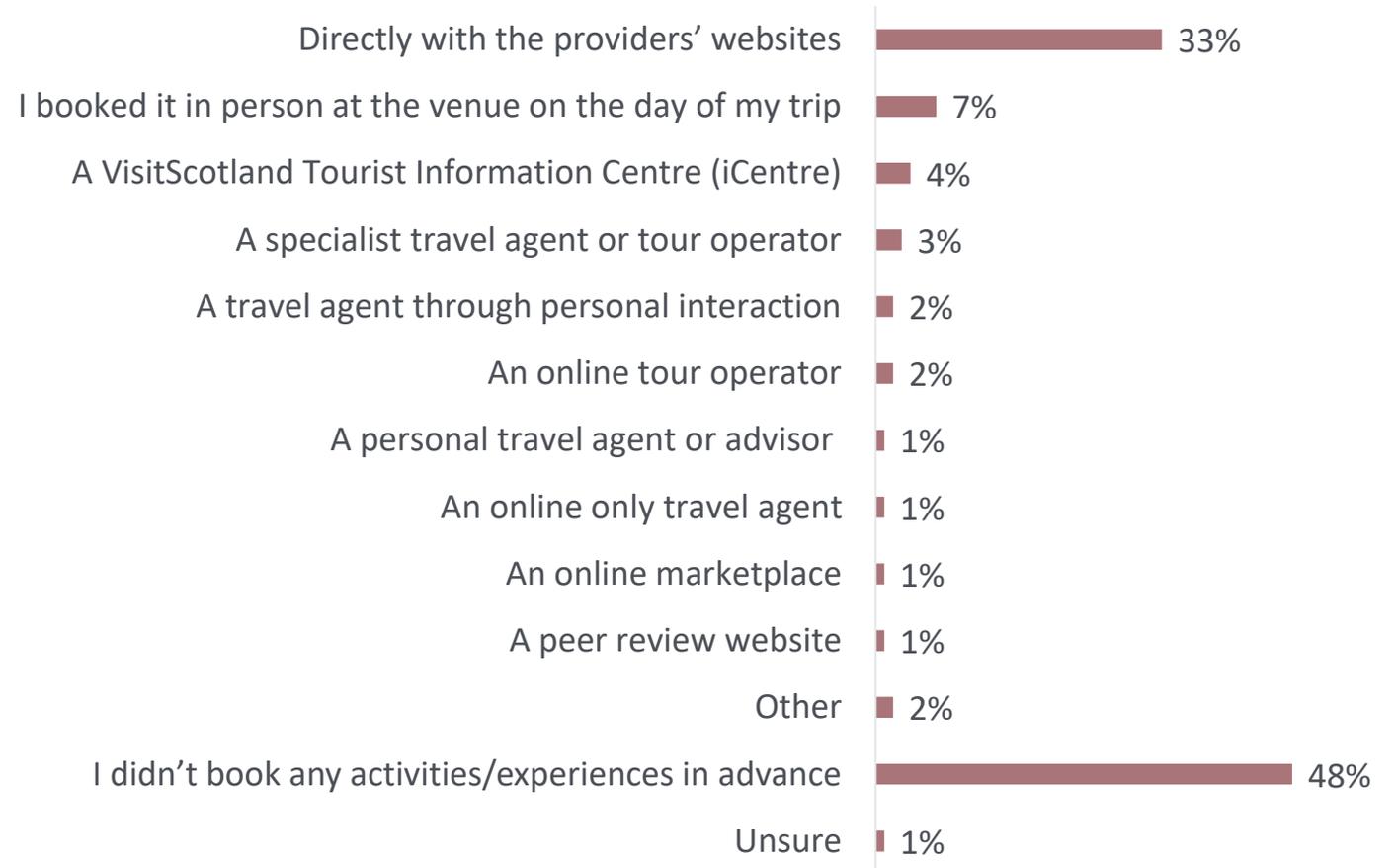
Base (booked travel/accom in advance): total 460, Leisure 328, VFR 77, Business 54 40

Visitor journey

Booking

- Approximately half of Leisure and VFR visitors reported that they booked activities or experiences on Shetland. The most common way of doing this was directly on providers websites (33%).
- As we might expect, Leisure visitors were more likely to book activities or experiences (57%) than VFR visitors (27%).

Method of booking activities/ experiences – Leisure & VFR



Q22: How did you book your activities or experiences within Shetland before your trip?

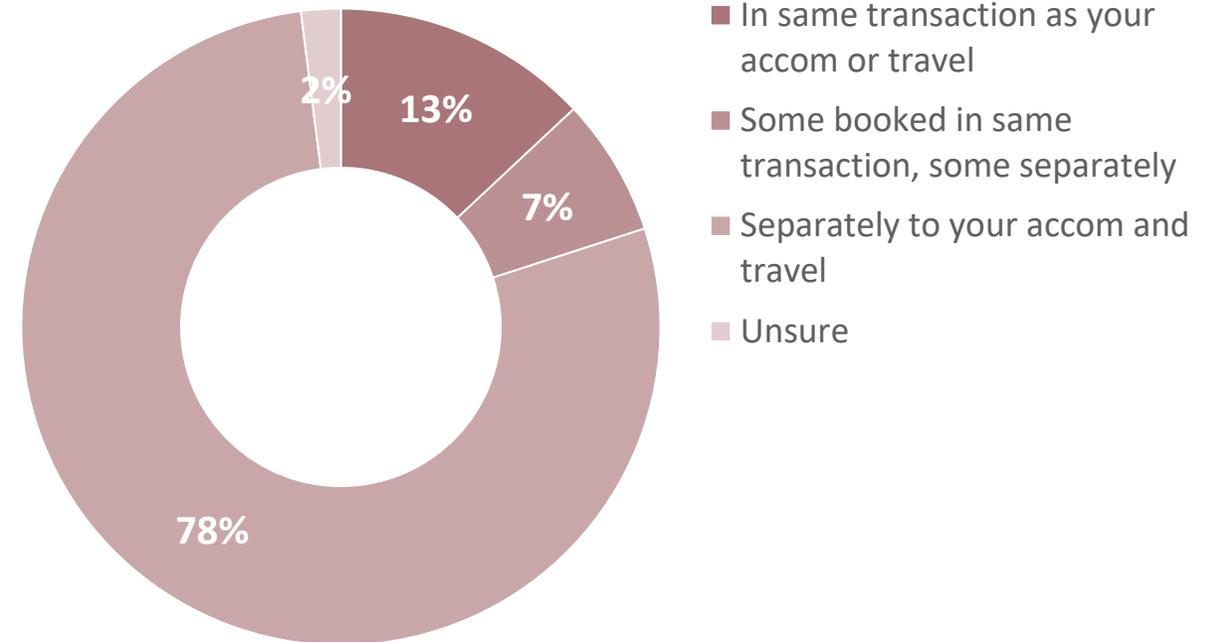
Base (All Leisure/VFR): 392

Visitor journey

Booking

- The majority of visitors who booked activities/experiences (78%) did this separately to their accommodation and travel bookings.
- A significant minority (20%), however, did book at least some of their activities and experiences in the same transaction as their accommodation or travel.
- There were no significant differences in these findings by country of origin.

Were activities/experiences booked...? – Leisure & VFR



Q23: And were your activities or experiences within Shetland booked...?

Base (Leisure/VFR visitors who booked activities/experiences, excl day trippers): 166

Visitor journey

Summary



- The top reasons given for visiting Shetland for Leisure visitors were the scenery and landscape, the wildlife, the history/culture and it being a place visitors had always wanted to come to.
- Digital information, such as Shetland.org and visitscotland.co.uk, and books, TV and films were the most influential sources for Leisure visitors when they were deciding on Shetland for their short break or holiday. The 'Shetland' BBC detective series and books were particularly influential.
- In general, Leisure visitors planned their trip to Shetland around 3 to 12 months before travel. VFR visitors tended to have a shorter planning period, with almost half starting the process within 3 months of travel.
- Consistent with previous waves of the survey, the majority of visitors in 2024 booked their transport and accommodation separately, rather than booking a package, and in most cases, bookings were made directly with providers. Over a third of Leisure visitors used a travel agent to book their accommodation, most often an online only travel agent.
- Around half of Leisure/VFR visitors booked activities or experiences on Shetland. For most, activities bookings were made directly with the provider.



Trip profile

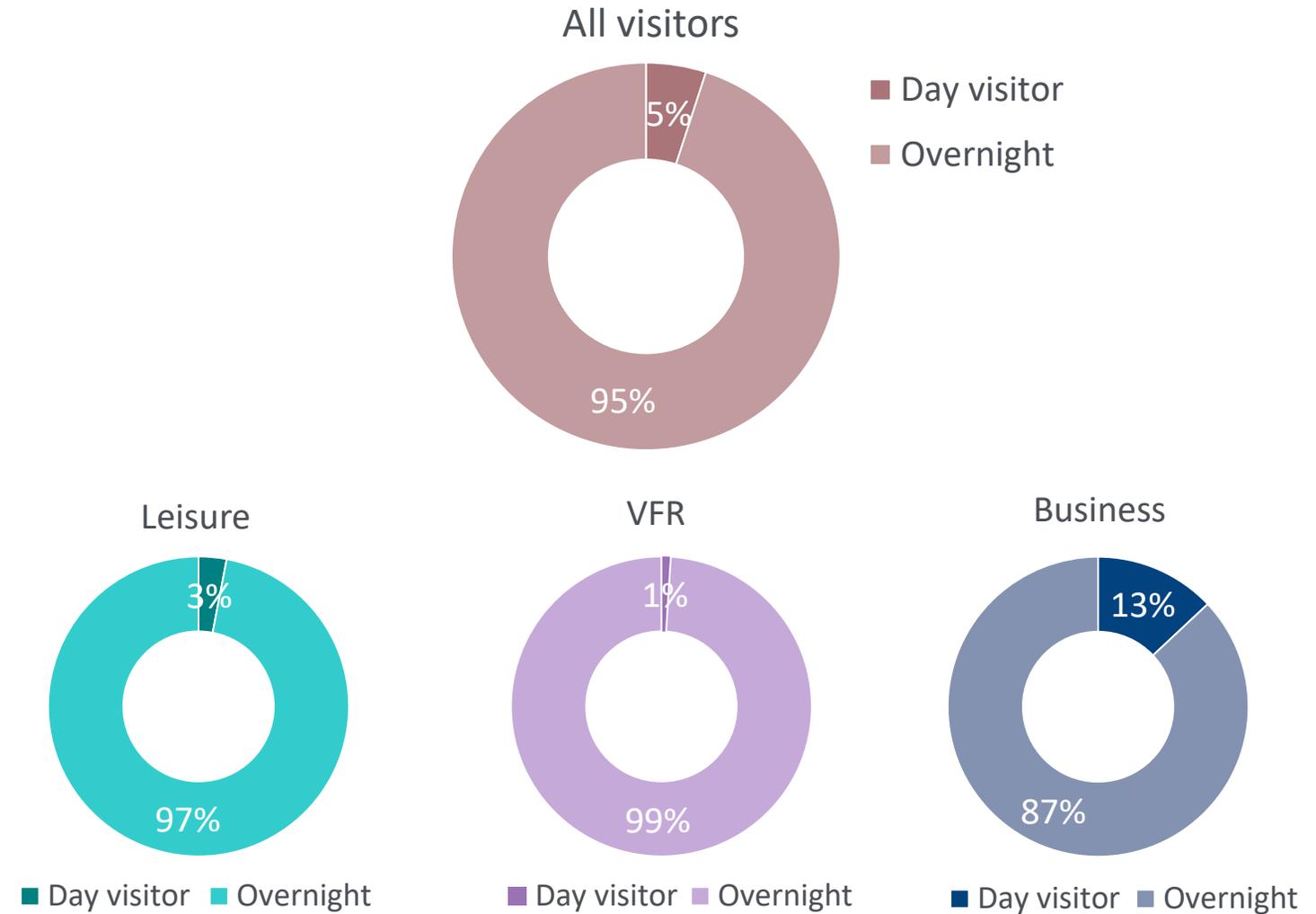
Trip Profile

Day vs overnight

- The vast majority of visitors to Shetland in 2024 were overnight visitors (95%). This proportion is consistent with 2017 (92%) and 2019 (96%).
- VFR (99%) and Leisure (97%) visitors were more likely to stay for one or more nights than Business visitors (87%). Again, these proportions are consistent with 2017 and 2019.



Day visitor or staying overnight



CQ4: Are you on a day trip to the Shetland Islands or have you stayed overnight?

Base (calibration visitors): total 1,356, Leisure 690, VFR 253, Business 396

Trip Profile

Number of nights

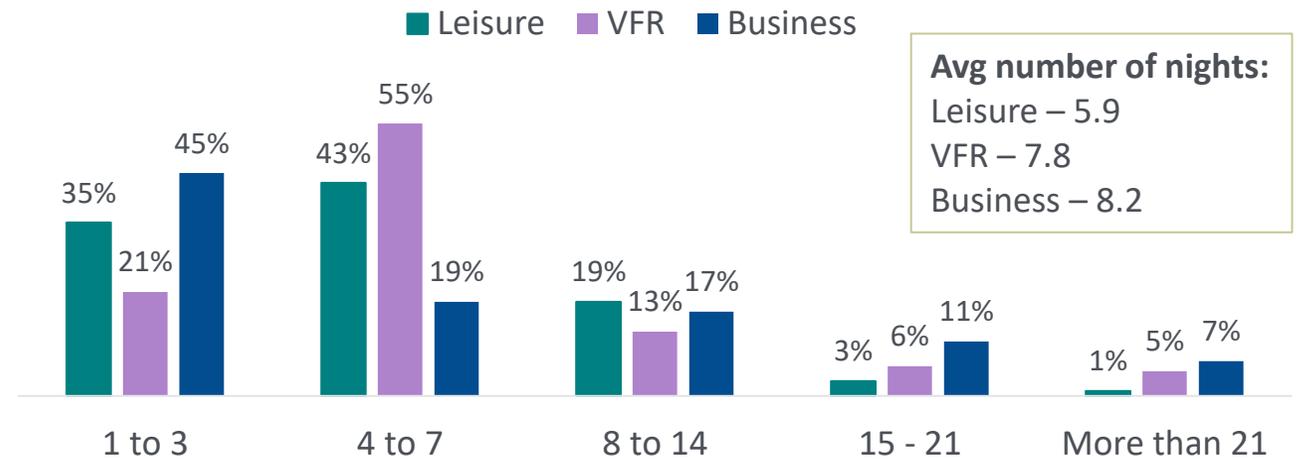
- Consistent with previous waves of the survey, the majority of overnight visitors to Shetland (74%) stayed for a period of one week or less, with the overall average length of staying being 6.9 nights.
- The average length of stay in 2024 is very similar to 2017, but slightly longer than in 2019. To demonstrate, 26% stayed for more than a week in 2017 and 2024, compared to 19% in 2019.
- The majority of Leisure visitors (77%) stayed in Shetland for up to a week, with an average length of stay of 5.9 nights. VFR and Business visitors tended to have a longer visit (average 7.8 and 8.2 nights), although the majority of these types of visitors stayed for a week or less.
- Leisure visitors from the rest of the UK (average 7 nights) tended to stay longer on Shetland than those from Scotland (average 5.4 nights) or overseas (average 5.4 nights).



Number of nights in Shetland



Avg number of nights:
 2017 – 7.3
 2019 – 5.8
 2024 – 6.9



Avg number of nights:
 Leisure – 5.9
 VFR – 7.8
 Business – 8.2

CQ5: How many nights have you spent on the Shetland Islands as part of your trip?

Base (all overnight calibration visitors): total 1,288, Leisure 673, VFR 251, Business 347

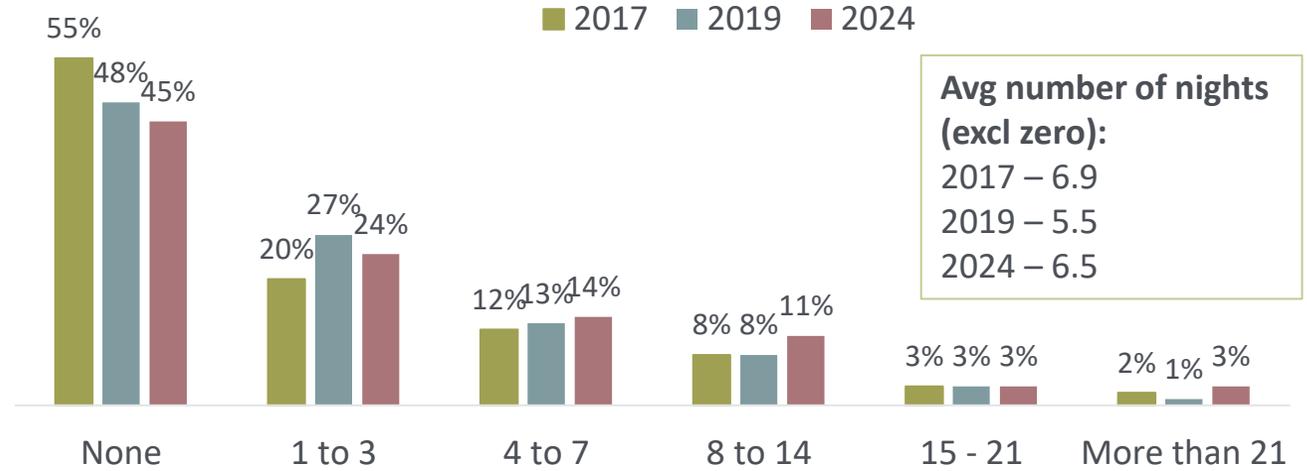
Trip Profile

Number of nights

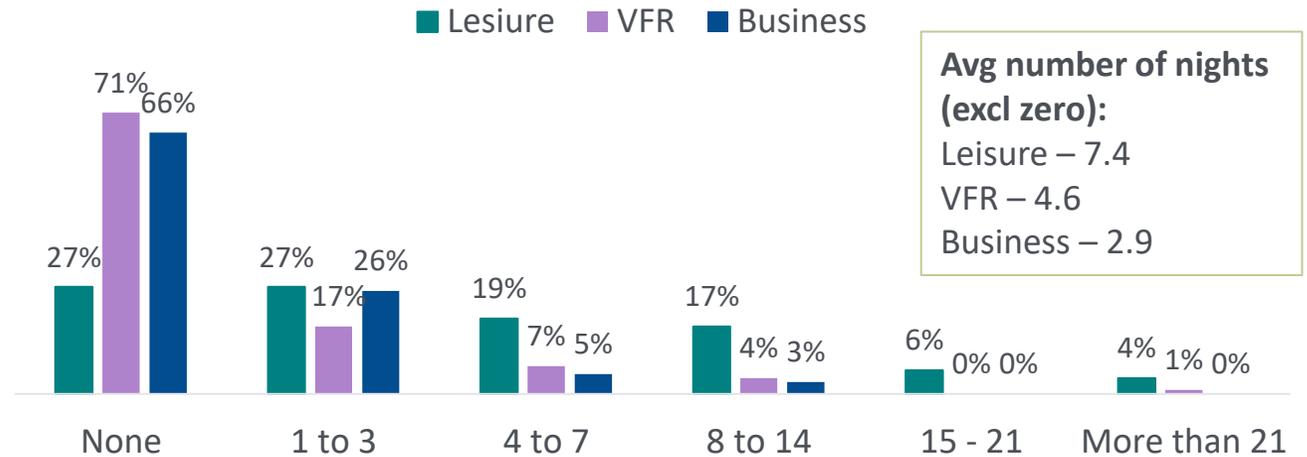
- Of those who stayed overnight on Shetland, just over half (55%) reported that they also spent nights elsewhere in Scotland on their trip. This proportion is similar to 2019 (52%) but higher than in 2017 (45%).
- On average, visitors spent 6.5 nights in other parts of Scotland, which is similar to previous waves of the survey.
- As we would expect, Leisure visitors (73%) were more likely to spend nights in other parts of Scotland than VFR (29%) or Business (34%) visitors.
- Of those who did spend some time in other parts of Scotland, Leisure visitors had the longest stay (average 7.4 nights) and Business visitors had the shortest stay (average 2.9 nights).



Number of nights elsewhere in Scotland



Avg number of nights (excl zero):
 2017 – 6.9
 2019 – 5.5
 2024 – 6.5



Avg number of nights (excl zero):
 Leisure – 7.4
 VFR – 4.6
 Business – 2.9

Q7: You previously indicated that you were on an overnight visit to Shetland. On your trip, how many nights did you spend away from home... Elsewhere in Scotland?

Base (all overnight visitors): total 489, Leisure 345, VFR 82, Business 61

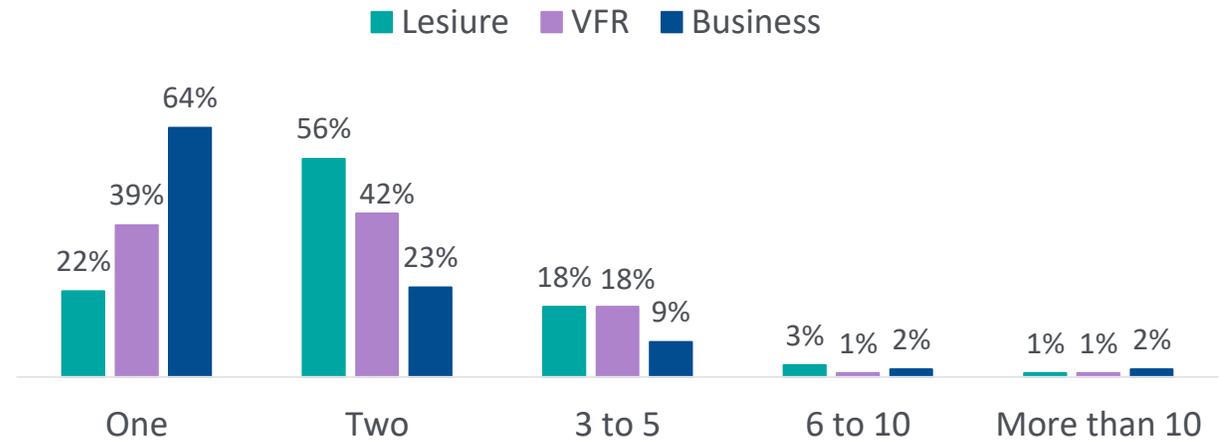
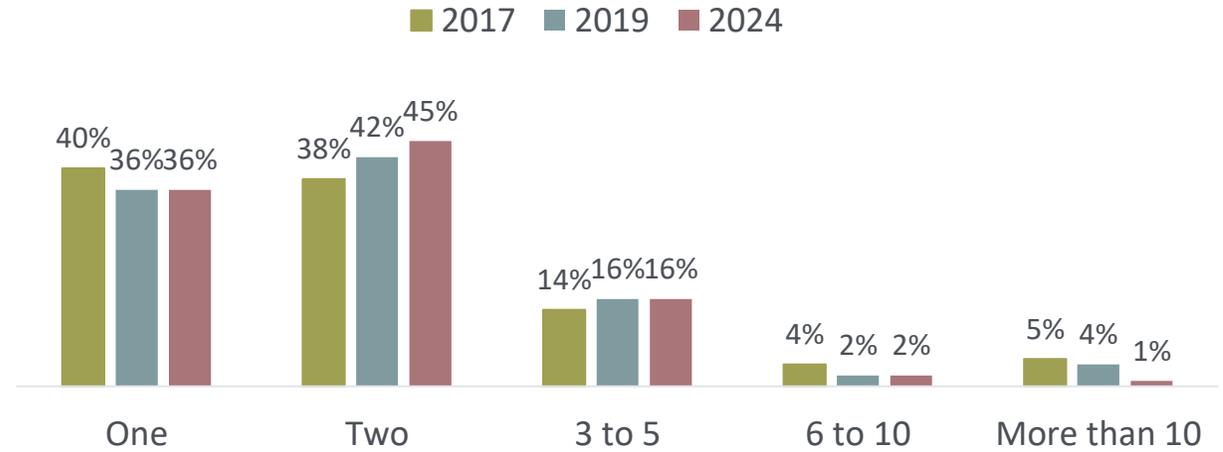
Trip Profile

Party composition

- The majority of visitors to Shetland reported that they were either visiting alone (36%) or with one other person (45%).
- However, the number of people in the party varies significantly depending on the type of visitor. For Leisure visitors, more than half (56%) visited with one other person, whilst the majority of Business visitors were travelling solo (64%). Most of the people visiting Shetland to catch up with friends and relatives were equally either solo travellers (39%) or travelling as a pair (42%).
- Since 2017 there has been a steady increase in the proportion of people travelling in a party of two, and a corresponding decrease in larger parties of six or more.
- Amongst Leisure visitors, a higher proportion of those from Scotland were travelling alone (27%) compared to visitors from overseas (19%). Male (23%) and female (20%) visitors were equally likely to be travelling solo and there were also no differences by age group.
- The group size by visitor type was very similar in 2024 to previous waves of the survey.



Number of people in party



CQ1: How many people, including yourself, are in your immediate group or party?

Base (all calibration visitors): total 1,356, Leisure 690, VFR 253, Business 396

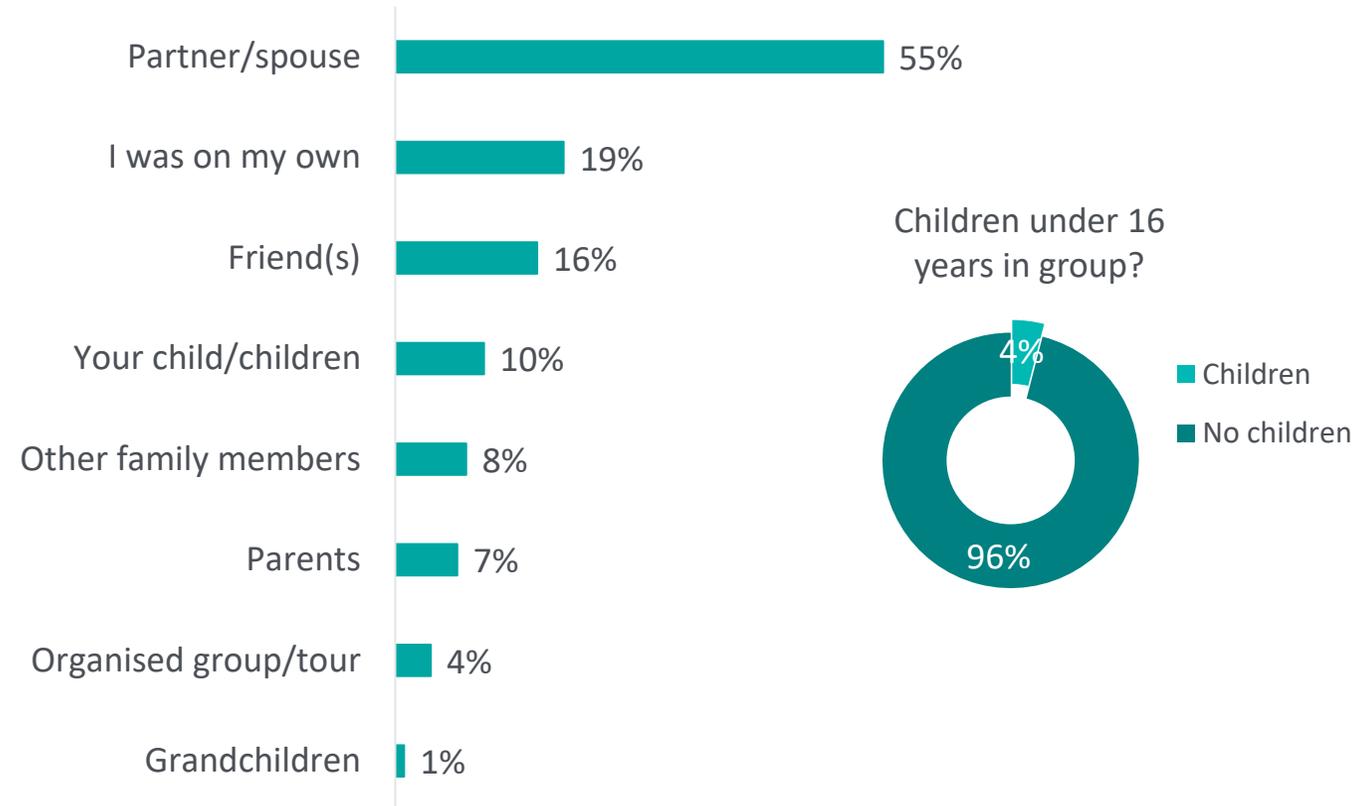
Trip Profile

Party composition

- In common with previous waves of the research, the largest proportion of Leisure visitors to Shetland in 2024 (55%) were travelling with their partner/spouse in their party. It should be noted, however, that only 42% were travelling as a couple, with many also mentioning others in their group, such as children or friends.
- Similar to 2017 (8%) and 2019 (5%), only a small minority (4%) of Leisure visitors had children under 16 years old in their group.
- These findings for party composition are very consistent with 2017 (38% couples and 23% solo) and 2019 (43% couples and 23% solo).



Party composition – Leisure visitors



Note: There is a slight difference in the proportion of Leisure visitors reporting that they are travelling alone here compared to the previous chart. This is because number of people in party was asked in the calibration survey and who visitors were travelling with was asked in the online survey.

Q6: Which of the following best describes who was with you on your trip?

Base (all Leisure): 350

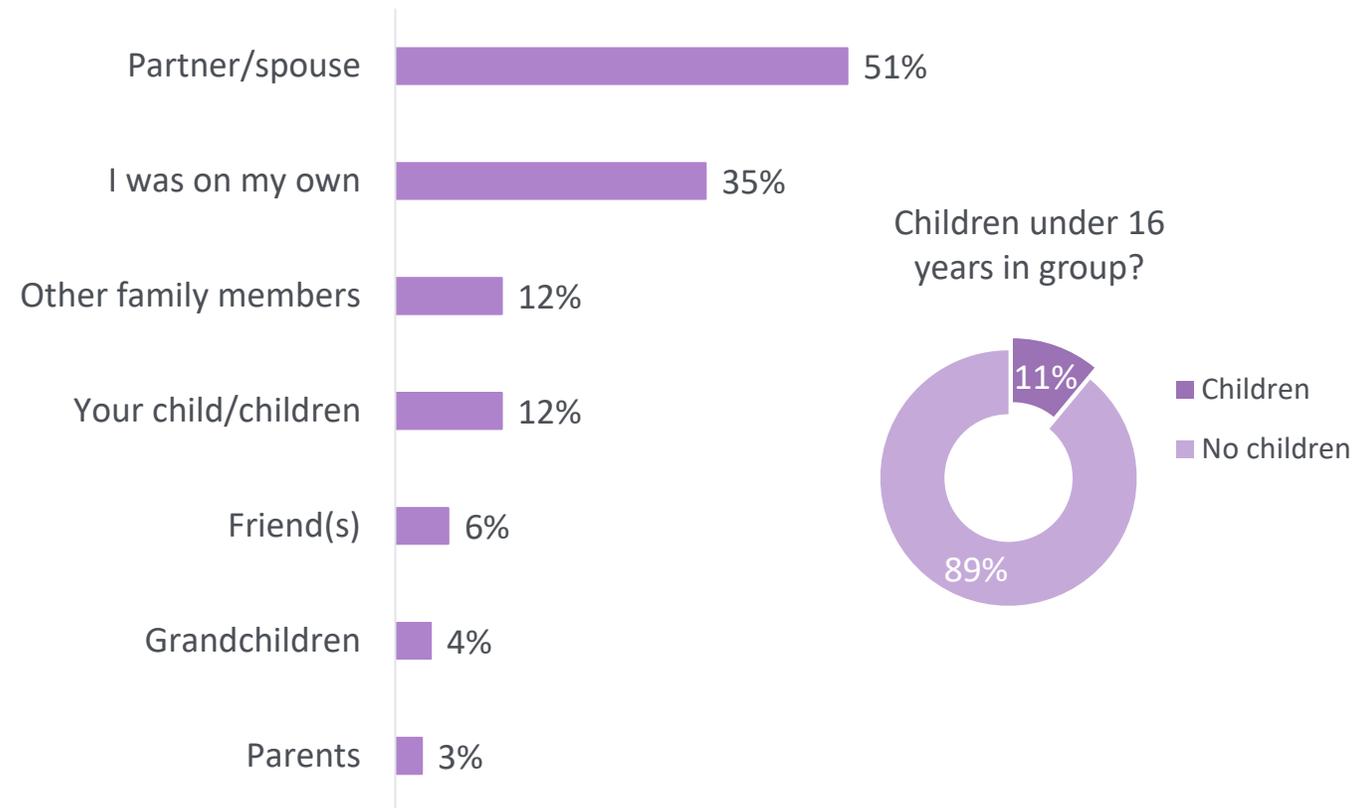
Trip Profile

Party composition

- Amongst those travelling to Shetland to visit friends and relatives, a higher proportion were travelling alone (35%) compared to Leisure visitors (19%).
- Half of VFR visitors reported that they were visiting with their partner/spouse, with 36% reporting no other people in their group (i.e. they were travelling as a couple).
- Just over one in ten (11%) VFR visitors reported having children under 16 years old in their group, which is higher than for Leisure visitors.

Party composition

– Visiting friends and relatives



Q6: Which of the following best describes who was with you on your trip?

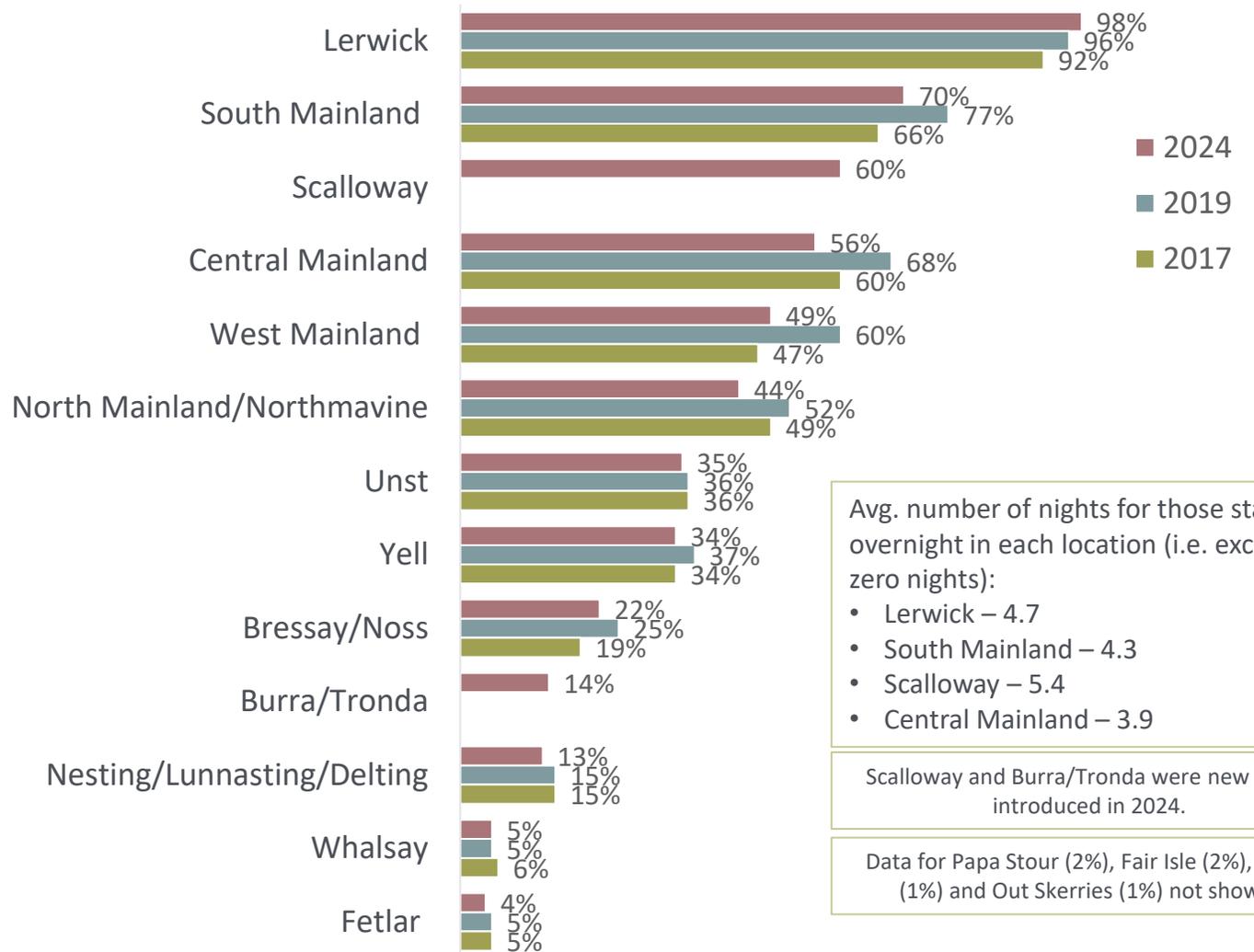
Trip Profile

Areas visited

- Almost all visitors to Shetland reported that they visited Lerwick during their trip. The majority also mentioned visiting South Mainland (70%), Scalloway (60%) and Central Mainland (56%). These findings are broadly consistent with 2017 and 2019, although Scalloway was not a coded option in previous waves.
- Also consistent with previous waves, just less than half of visitors went to West Mainland (49%) and North Mainland/Northmavine (44%), while around a third reported that they had visited Yell or Unst during their trip to the Shetland Islands.
- On average, visitors to Lerwick, South Mainland, Scalloway and Central Mainland tended to stay for 4 or 5 nights in each location.
- 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 visitor type are shown in the following pages.



Areas of Shetland visited – All visitors



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

- Lerwick – 4.7
- South Mainland – 4.3
- Scalloway – 5.4
- Central Mainland – 3.9

Scalloway and Burra/Tronda were new codes introduced in 2024.

Data for Papa Stour (2%), Fair Isle (2%), Foula (1%) and Out Skerries (1%) not shown.

Q8: Which of the following areas of Shetland did you visit during your trip?

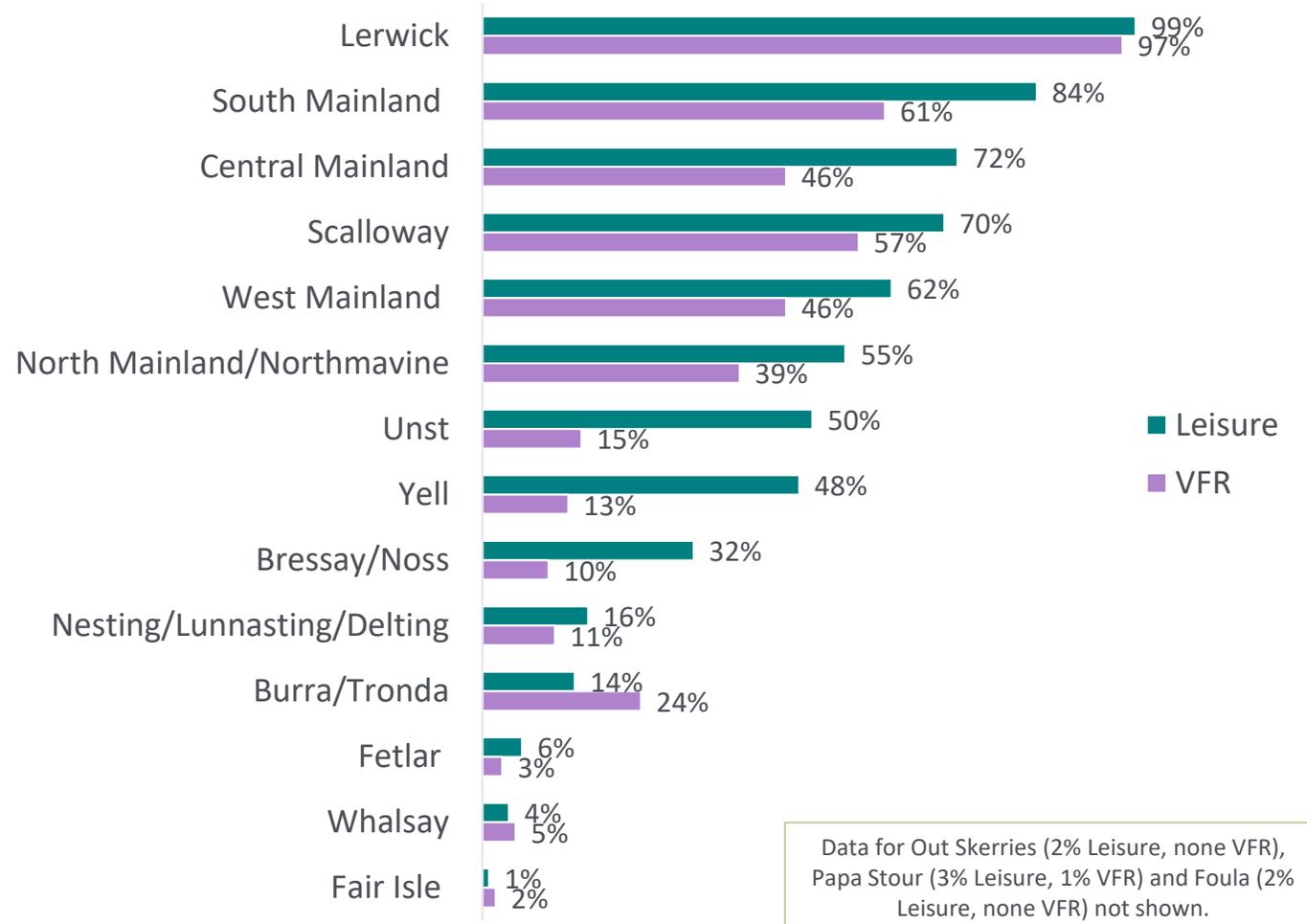
Trip Profile

Areas visited

- Both Leisure and VFR visitors predominantly visited Lerwick and the other mainland locations.
- However, the proportion of Leisure visitors visiting most parts of Shetland was higher than VFR visitors, for example South, Central, West and North Mainland, Yell, Unst and Bressay/Noss. 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.
- The only area visited by a higher proportion of VFR than Leisure visitors was Burra/Tronda.



Areas of Shetland visited – Leisure and VFR visitors



Q8: Which of the following areas of Shetland did you visit during your trip?

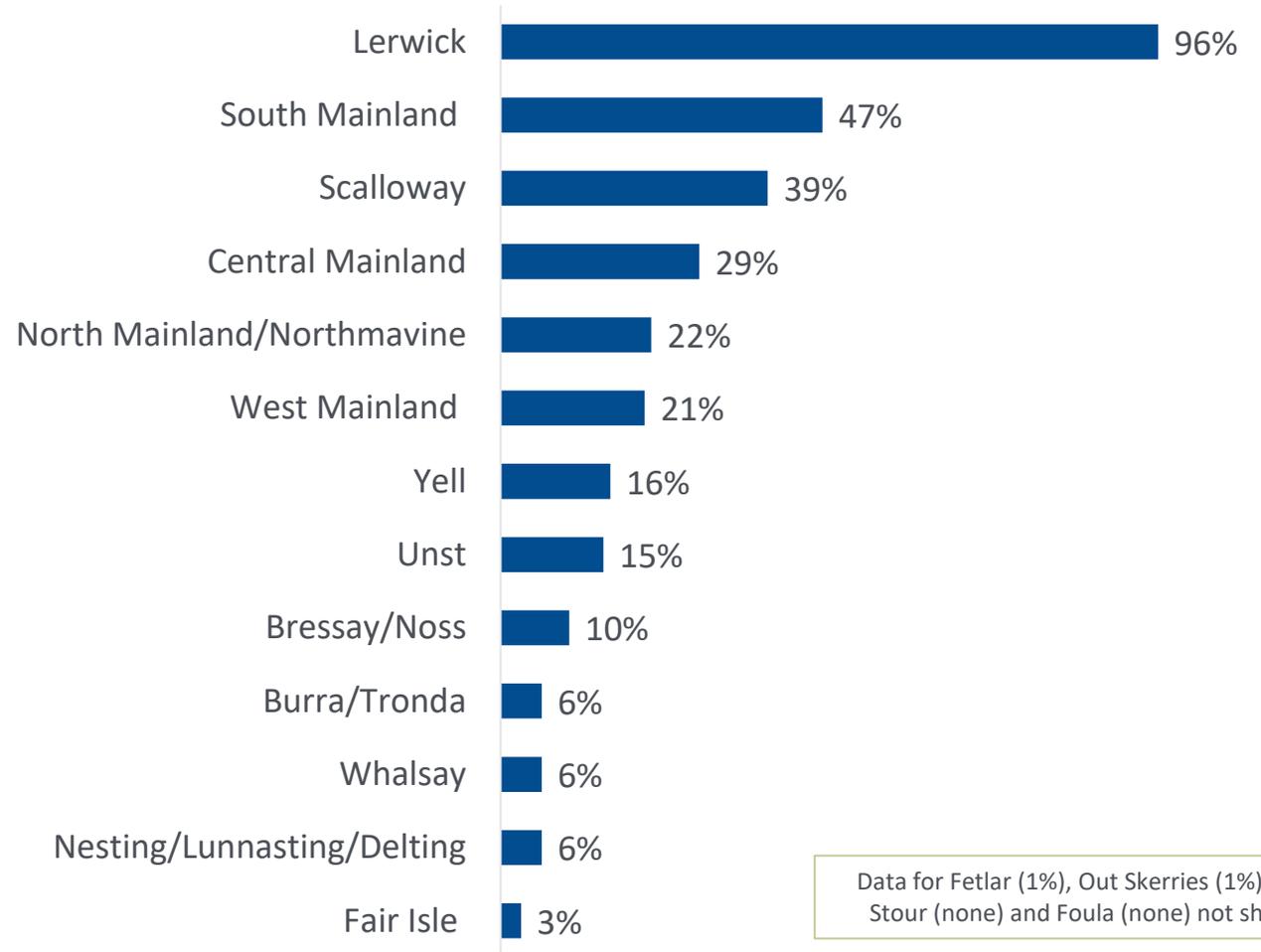
Trip Profile

Areas visited

- As we would expect, Business visitors tended to focus on one or two locations, rather than visiting multiple locations across Shetland.
- Almost all Business visitors (96%) reported going to Lerwick, while 47% also visited South Mainland and 39% visited Scalloway.



Areas of Shetland visited – Business visitors



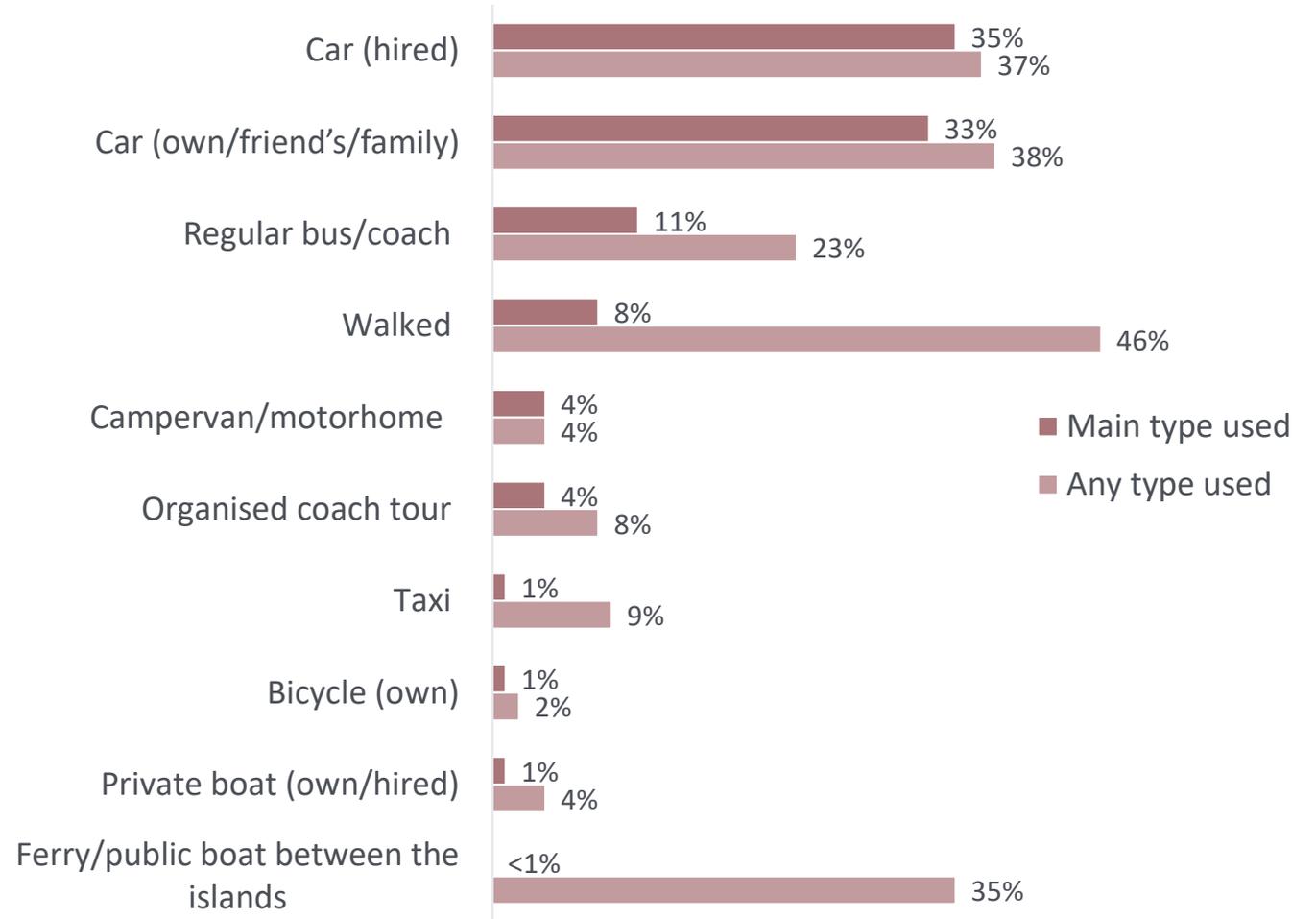
Q8: Which of the following areas of Shetland did you visit during your trip?

Trip Profile

Transport

- Almost three quarters of Leisure/VFR visitors (73%) reported that they had travelled by car during their visit to Shetland – 37% using their own car and 38% using a hired car – and for most of these visitors, by car was also their main method of transport for their trip.
- Almost a quarter (23%) had used the local bus service, although only 11% said that this was their main method of transport. Similarly, whilst 46% walked to a destination at some point in their trip, only 8% travelled mainly on foot.
- Interestingly, over a third of Leisure/VFR reported travelling between islands by ferry, which reflects the high number of different islands within the archipelago mentioned by visitors when asked where they had visited.
- There were some key differences in types of transport used between Leisure and VFR visitors, most notably VFR visitors being more likely to use a private car (83% vs 23% Leisure) and Leisure visitors more likely to hire a car (44% vs 15% VFR). The full data for Leisure visitors can be found over.

Transport used during visit



Q16a/b: What types/main type of transport did you use during your visit to Shetland?

Transport mentioned by <2% not shown

Base (All Leisure/VFR): 433

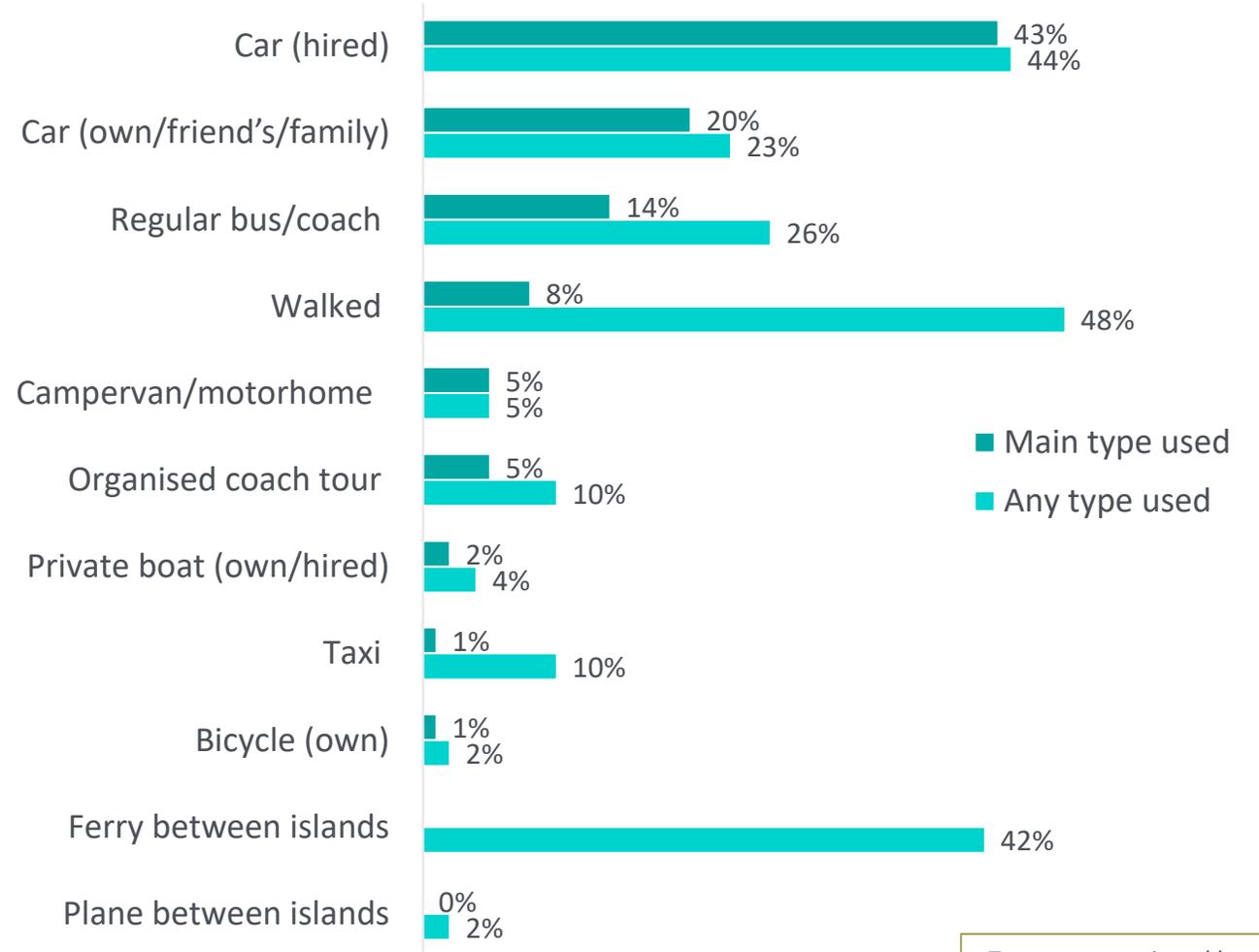
Trip Profile

Transport

- Cars were the most often used type of transport for Leisure visitors, mentioned by 66% in total. Hired cars (44%) were more frequently mentioned than privately owned cars (23%).
- Significant proportions also reported that they travelled by walking (48%), inter-island ferry (42%) and by bus (26%).
- The methods of transport used by Leisure visitors in 2024 were very similar to those used in 2019. For example, when asked what was their main method of transport in 2019, 41% of Leisure visitors said a hire car, 16% used a private car and 12% travelled by bus. Similarly, in 2017 the top answers for main type of transport for Leisure visitors were hired car (36%), private car (26%) and bus (9%).
- As we might expect, Leisure visitors from overseas (53%) were more likely to use a hire car as their main method of transport than those from Scotland (28%) and the rest of the UK (37%).



Main type of transport used during visit – Leisure visitors



Transport mentioned by <2% not shown

Q16a/b: What types/main type of transport did you use during your visit to Shetland?

Base (All Leisure): 350

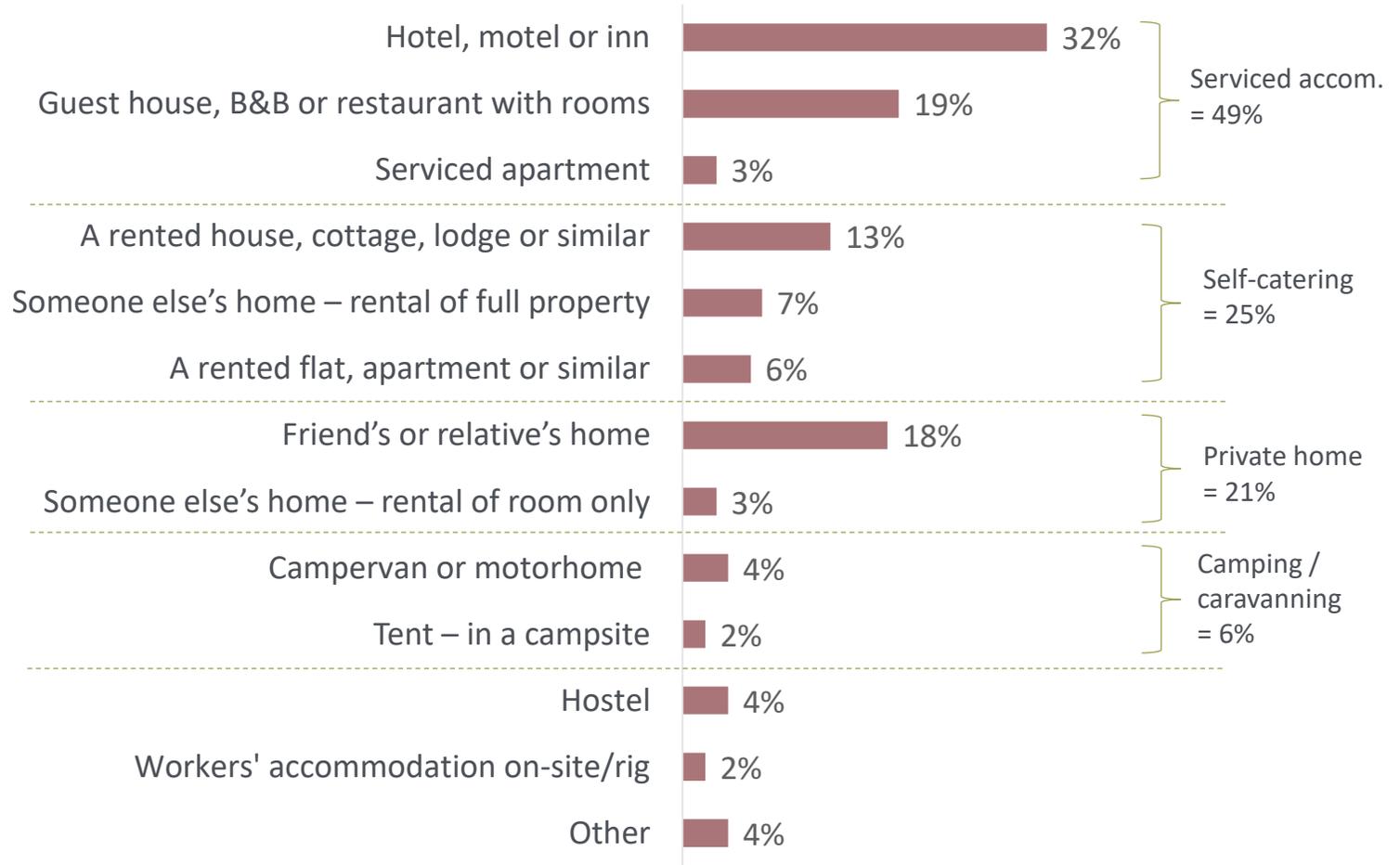
Trip Profile

Accommodation

- Hotels, motels and inns (32%) was the most cited type of accommodation for overnight visitors, followed by B&Bs (19%), a friend or relative's home (18%) and a rented house/cottage/lodge (13%).
- In total, almost half of visitors (49%) stayed in serviced accommodation, while others opted for non-serviced options, such as self-catering property rental (25%), someone's private home, such as Airbnb (21%) and camping/caravanning (6%).
- These accommodation types were also the most popular in 2017 (34% hotel, 21% B&B, 19% friend/relative's home) and 2019 (33% hotel, 24% B&B, 18% friend/relative's home).
- Hotels were particularly prevalent amongst Business visitors (44%), compared to Leisure (35%) and VFR (11%) visitors.
- Self-catering accommodation was more common amongst Leisure visitors (34%), compared to VFR (11%) and Business (15%) visitors.
- As expected, the majority of VFR visitors (75%) were staying with friends or relatives.



Accommodation stayed in during visit – Overnight visitors



Accommodation types with less than 1% are not shown

Q17: What type of accommodation did you stay in during this visit to Shetland?

Base (All overnight visitors): 489

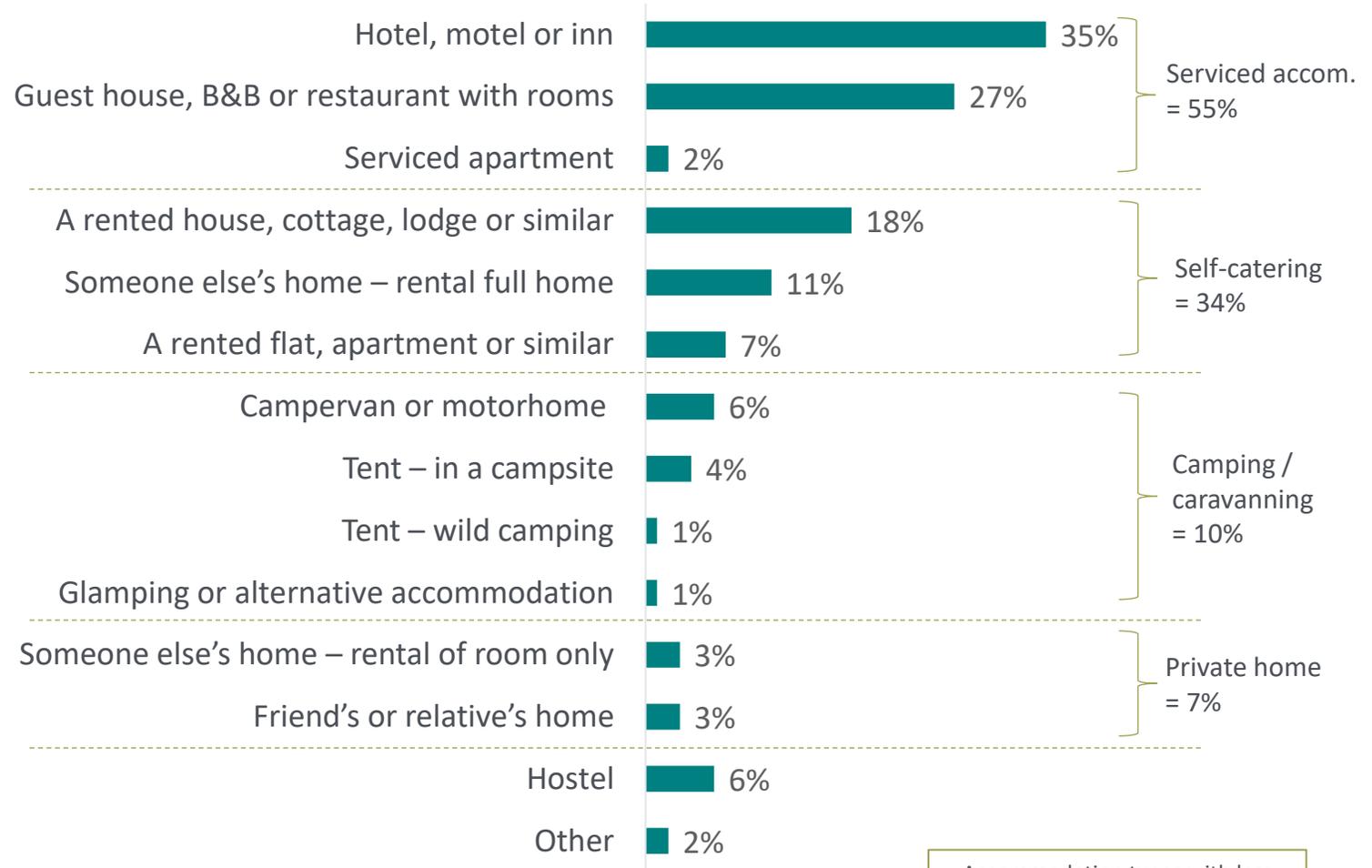
Trip Profile

Accommodation

- More than one third (35%) of Leisure visitors stayed in a hotel during their visit to Shetland, while 27% stayed in a B&B and 18% stayed in a rented house, cottage or lodge. In total, 55% of Leisure visitors stayed in serviced accommodation, while 34% stayed in self-catering and 10% camped or caravanned.
- Leisure visitors from overseas were more likely to stay in serviced accommodation (70%), such as hotels (43%) and B&Bs (36%) than those from Scotland (37%) or the rest of the UK (45%). Scotland and rest of UK visitors were fairly evenly split between those who opted for serviced accommodation and self-catering property rental (Scotland 39%; rest of UK 43%).
- Younger respondents aged under 45 years old were more likely to rent someone's else's home (e.g. Airbnb) (19%) than those aged 65+ (5%).



Accommodation stayed in during visit – Overnight Leisure visitors



Accommodation types with less than 1% are not shown

Q17: What type of accommodation did you stay in during this visit to Shetland?

Trip Profile

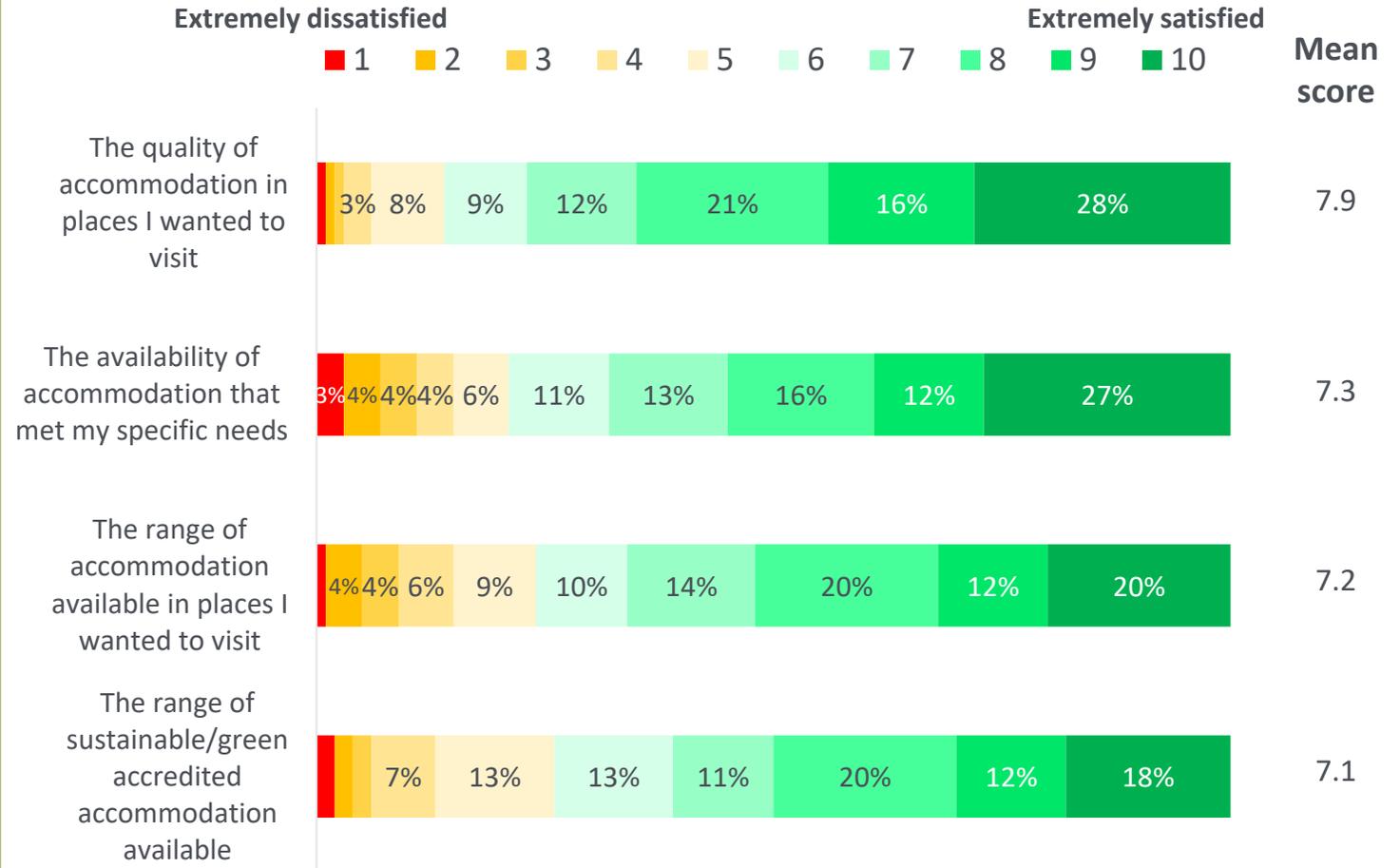
Accommodation



- Overnight visitors were asked to rate a range of factors that could have affected their search for accommodation on Shetland. The majority were satisfied with each of these, with the highest rating being provided for the quality of accommodation in the places they wanted to visit. Across all of those who rated this aspect, the average score was 7.9 out of ten, with 44% giving a score of nine or ten.
- Generally, there would also appear to be sufficient accommodation available to meet most visitors' specific needs – on average visitors scored this as 7.3 out of ten, with 39% giving a nine or ten score.
- The data suggests there is good accommodation options available across Shetland; the average score for the range of accommodation in the places visitors wanted to go was 7.2.
- Those who rated the range of green accredited accommodation tended to also be satisfied, with an average score of 7.1*.
- However, it is important to note that significant minorities of visitors rated the availability generally (21%), the availability of green accredited accommodation (25%), the range (23%) and the quality (14%) of accommodation with a score of five or less, indicating that some visitors did experience issues with the quality and availability of accommodation.

*Note: almost two thirds of respondents did not rate this aspect, suggesting that many did not look for green accreditation.

Satisfaction when looking for accommodation – Overnight visitors



Q18: Thinking back to when you were looking for accommodation, how satisfied were you with the following aspects?

Base (All overnight visitors excl rotational shift workers and unsure/N/A): 175 - 377 58

Trip Profile

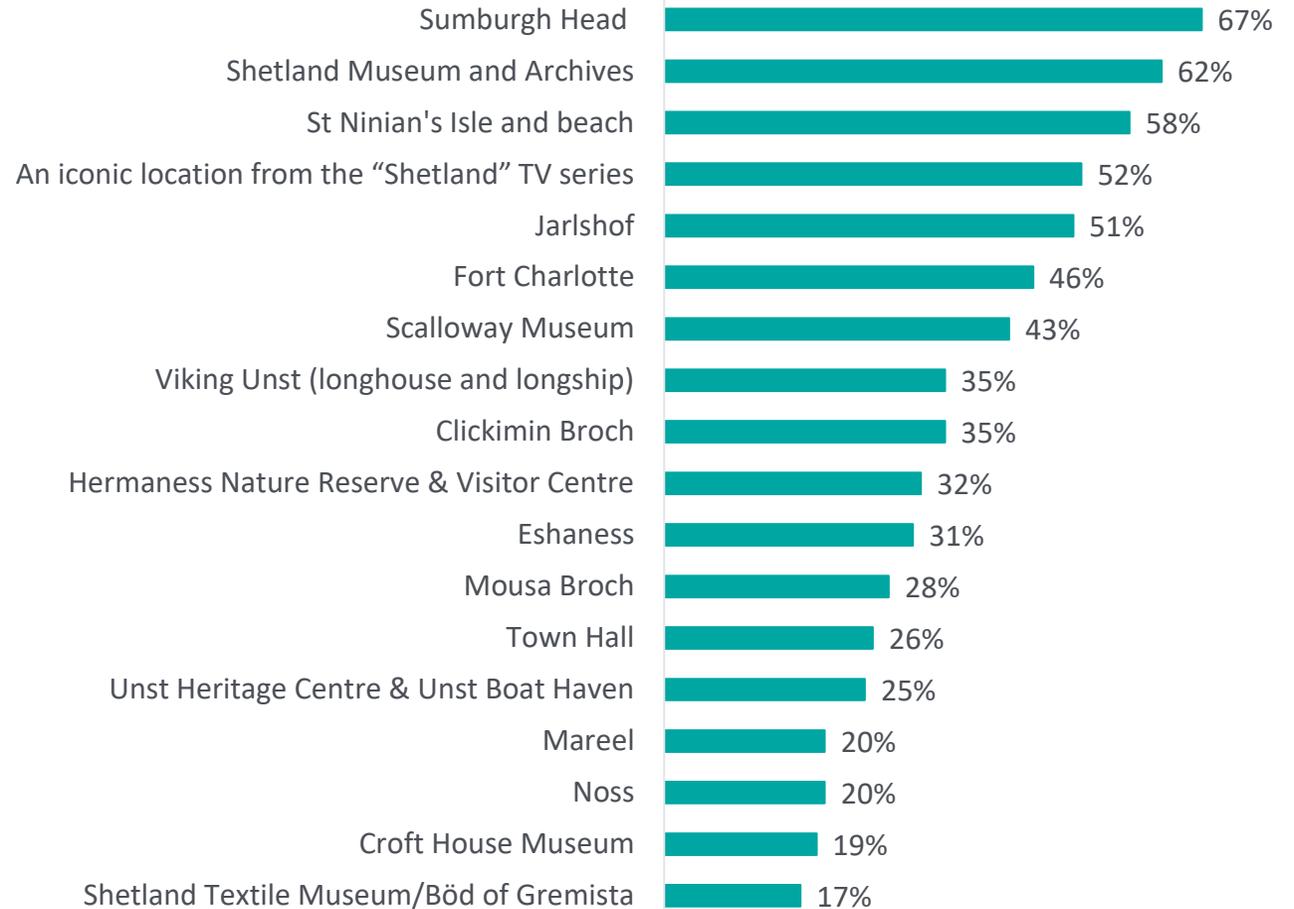
Attractions visited

- Leisure visitors were asked to name the attractions they visited during their trip to Shetland. The data opposite shows the proportions of all Leisure visitors who visited the most popular sites and attractions in 2024.
- Leisure visitors tended to visit a variety of attractions, with the most popular being Sumburgh Head, the Shetland Museum and Archives, St Ninian's Isle and beach, locations from the 'Shetland' TV series and Jarlshof. With the exception of 'Shetland' TV series locations, these were also the most popular attractions in 2019*.
- Overseas visitors were more likely than those from the UK to visit Fort Charlotte (53%) and the town hall (34%). Interestingly, locations from the 'Shetland' series were mentioned more often by overseas visitors (56%) than those from Scotland (41%). Just over half of rest of UK visitor (52%) also visited 'Shetland' locations.

*Note: Iconic locations from the Shetland TV series was not a response code in the 2019 questionnaire.



Top visitor attractions on Shetland – Leisure visitors



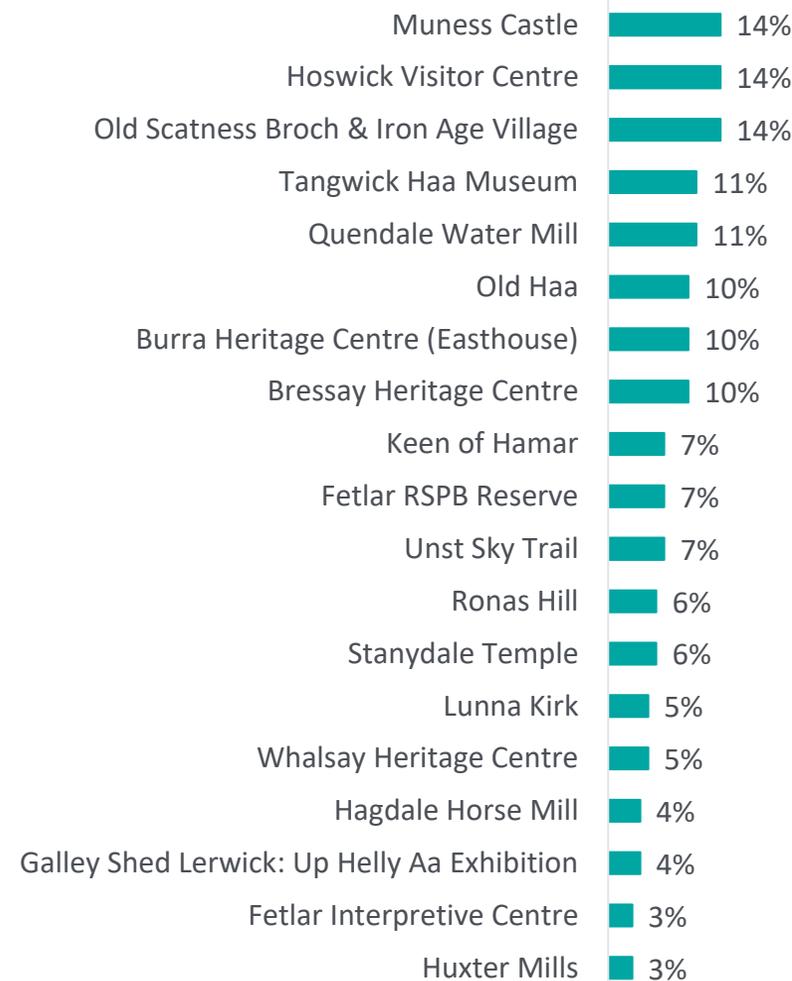
Q35-Q39: Which of these visitor attractions in Shetland did you visit on your recent trip?

Trip Profile

Attractions visited

- The data in the chart opposite shows the proportions of all Leisure visitors who visited some of the less prevalent attractions in 2024.
- The data further demonstrates the number of attractions that visitors included in their itinerary when visiting the islands, with at least some of the sample mentioning every attraction listed. These attractions had more niche appeal than some of the more popular attractions, while others were located on some of the more remote islands.

Less visited attractions on Shetland – Leisure visitors



Q35-Q39: Which of these visitor attractions in Shetland did you visit on your recent trip?

Attractions visited by less than 3% are not shown

Base (All Leisure): 350

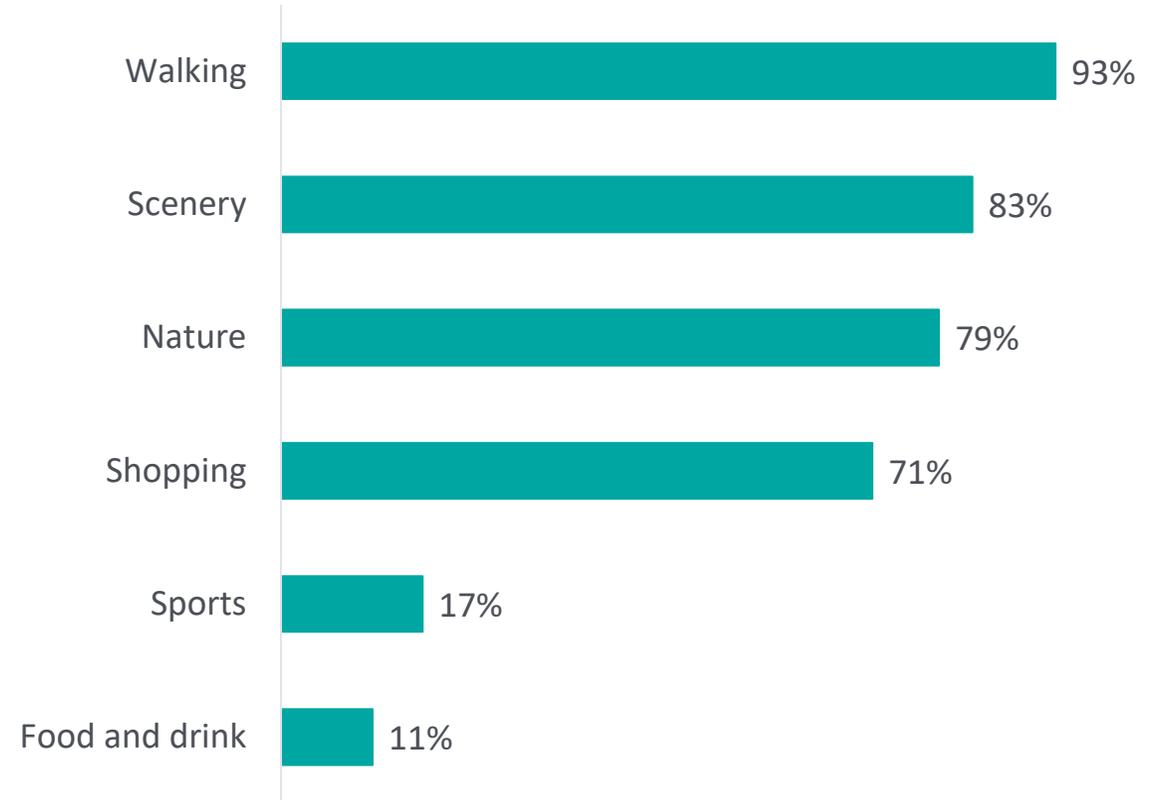


Trip Profile

Activities

- Leisure respondents were also asked what activities they participated in during their trip to Shetland. The data shown here combines responses to show the net proportions participating in key activities, such as walking (including long and short walks), scenery (beaches, viewpoints, etc.), nature (bird watching, marine wildlife watching etc.) and shopping (local crafts and other).
- The majority took part in a variety of activities including walking (93%), enjoying scenery (83%), watching nature (79%) and shopping (71%).
- Visitors from Scotland (32%) were more likely to mention participating in a sport than those from the rest of the UK (18%) and overseas (9%).

Top activities on Shetland – Leisure visitors



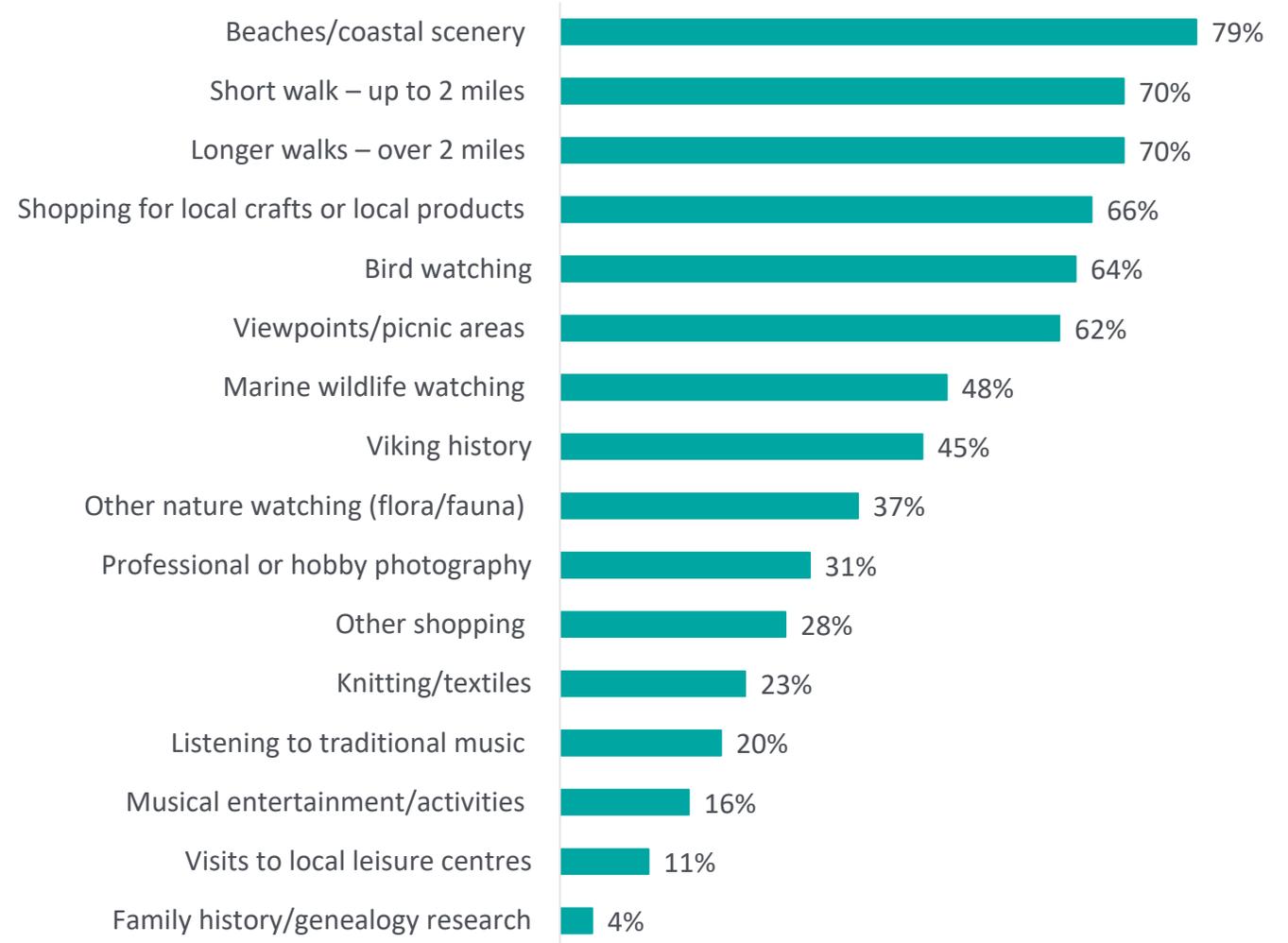
Q41: Did you take part in any of the following activities during your visit to Shetland?

Trip Profile

Activities

- Similar to previous years, the outdoor environment, scenery and nature were the main attractions for Leisure visitors to Shetland. The majority reported that they had enjoyed walking, experiencing the coastal scenery and watching birds and other wildlife.
- Shopping for local products was also very prevalent, with two thirds of Leisure visitors shopping for local crafts/products.
- The history of the islands was also of clear interest to many, with 45% reporting that they learned about Viking history.
- A number of Leisure visitors also mentioned creative activities, such as photography (31%) and, perhaps unsurprisingly, knitting/textiles (23%).
- Bird watching (76%) and marine wildlife watching (59%) were particularly popular for visitors from the rest of the UK.

General activities in Shetland in detail – Leisure visitors



Q41: Did you take part in any of the following activities during your visit to Shetland?

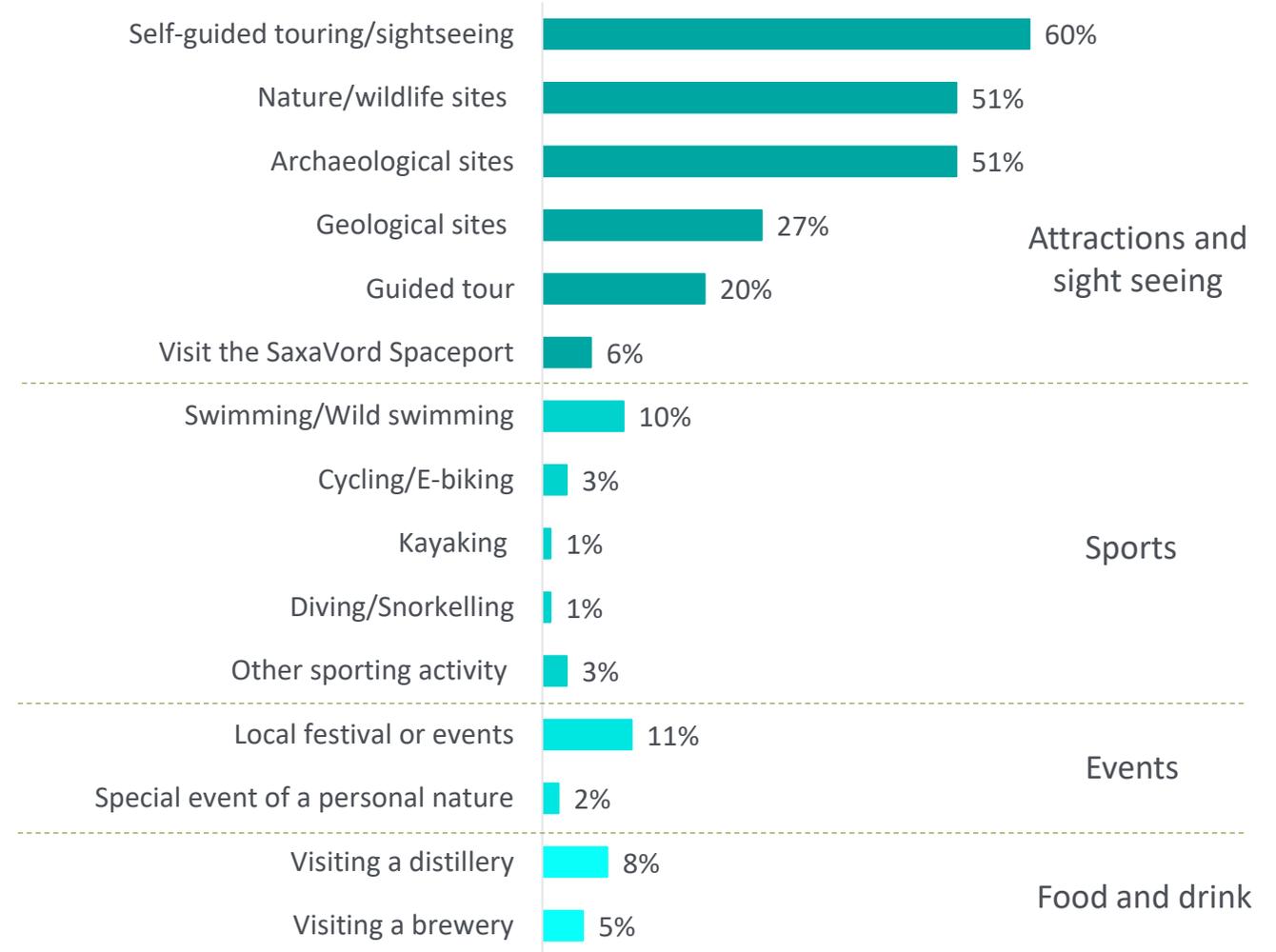
Trip Profile

Activities

- Respondents were also asked specifically about sight seeing tours, attractions, sporting activities, events and food and drink activities.
- Six in ten reported that they did their own self-guided touring, while a fifth went on a guided tour with a tour guide.
- The most popular attractions, mentioned by around half of Leisure visitors, were nature/wildlife sites and archaeological sites, with more than a quarter also visiting geological sites.
- Around one in ten visitors reported that they had enjoyed wild swimming during their visit, and/or attending a local festival/event.
- Amongst those who had visited a festival or event, the most frequently mentioned were Wool Week, the Shetland Folk Festival and agricultural shows.
- Food and drink activities were mentioned by 11% of Leisure visitors overall. These included visiting distilleries (8%) and breweries (5%).



Attractions, sporting activities, events and food and drink – Leisure visitors



Q41: Did you take part in any of the following activities during your visit to Shetland?

Trip profile

Summary

Leisure visitors

- The profile of trips for Leisure visitors has remained highly consistent since 2017 and 2019. Almost all Leisure visitors stayed overnight and overnight visitors typically stayed for 1 to 3 nights (35%) or 4 to 7 nights (43%).
- Hotels (35%) and B&Bs (27%) were the most popular accommodation types for Leisure visitors. In total, 53% of Leisure visitors stayed in serviced accommodation, while 34% stayed in self-catering and 11% camped or caravanned. Travel around the islands was typically by car – two thirds cited this as their main method of transport.
- The largest proportion (42%) were visiting as a couple, with their partner/spouse, while one fifth of Leisure visitors were travelling alone. Only a small minority (4%) had children under 16 years old in their group.
- The top attractions were Sumburgh Head, Shetland Museum, St Ninian's Isle, locations from the 'Shetland' series, and Jarlshof.
- The top activities were walking, enjoying the beautiful scenery (especially coasts and beaches), wildlife (particularly bird watching) and shopping for local arts and crafts.

VFR Visitors

- VFR visitors were most likely to be staying on Shetland for 4 to 7 nights (55%), and, as we might expect, three quarters stayed with friends or relatives.
- Just over one third of VFR visitors were travelling as a couple, while around a third were travelling alone. A higher than average proportion of VFR visitors (11%) reported that they had children in their group.

Business visitors

- Although the majority of Business visitors were staying overnight, this group were the most likely to be on a day trip (13%). Although 45% reported a stay of 1 to 3 nights, a relatively higher proportion (18%), compared to Leisure and VFR visitors, was staying on Shetland for longer than two weeks.
- The largest proportions had travelled alone (64%) and stayed in a hotel (44%).
- Almost all Business visitors (96%) reported visiting Lerwick, while almost half also visited South Mainland.

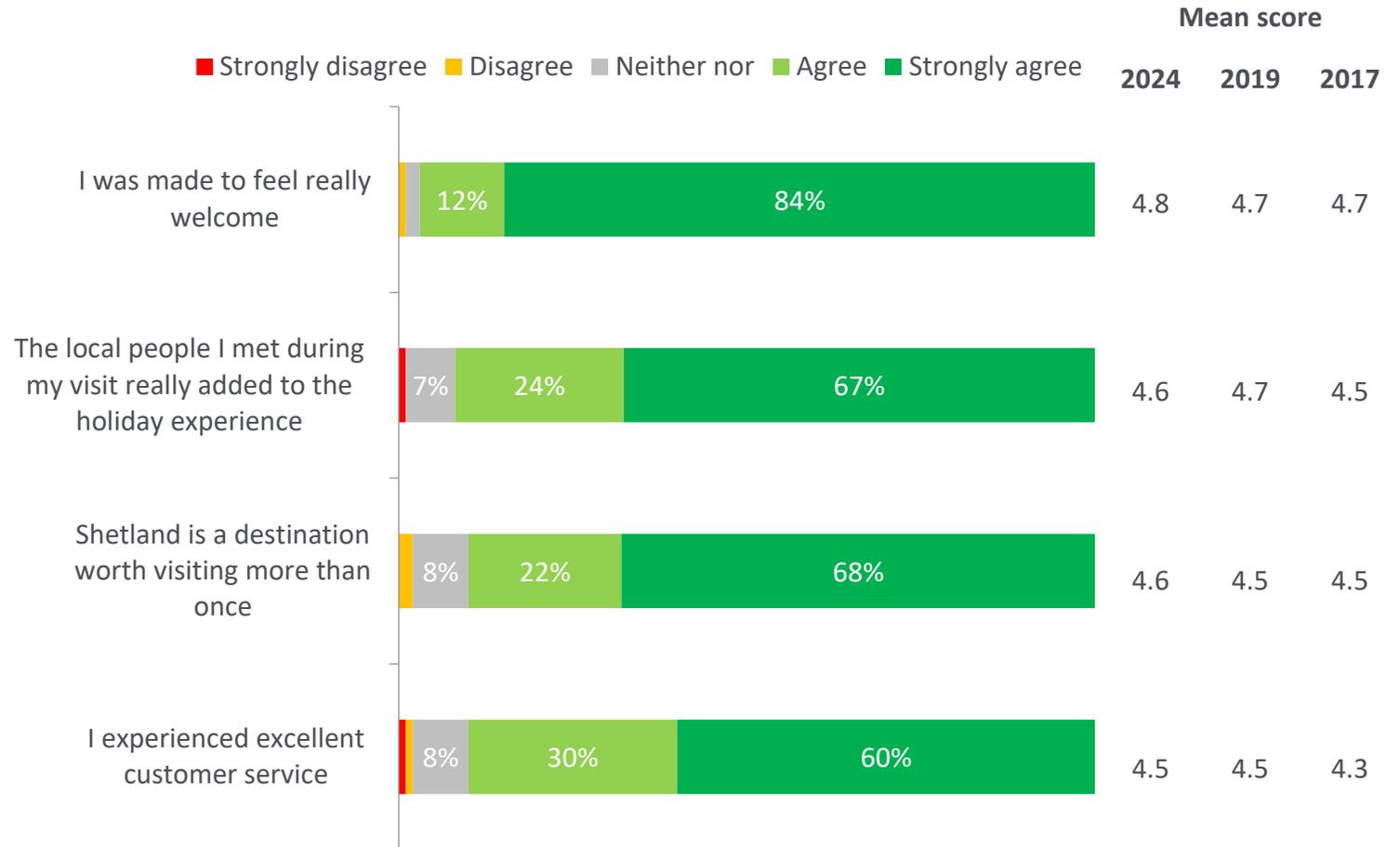
Evaluation of trip experience

Trip evaluation

Overall experience

- Leisure and VFR visitors were asked to state whether they agreed or disagreed with a number of statements about their visit. As the data shown here and over demonstrates, the majority agreed that they had a very positive visitor experience.
- The highest levels of satisfaction were noted for statements around interactions with local people, for example, being made to feel welcome, local people adding to the holiday experience, and excellent customer service. Almost all respondents agreed with these sentiments, with most agreeing strongly.
- The highest level of agreement was that visitors were made to feel really welcome during their visit. In total, 96% agreed, with 84% agreeing strongly.
- Given the positive feedback on their experiences with local people on the islands, it is perhaps not surprising that 90% agreed (with 68% agreeing strongly) that Shetland is worth visiting more than once.
- There were increases in satisfaction compared to previous waves of the survey. For example, 73% and 78% agreed strongly that they were made to feel really welcome in 2017 and 2019 respectively, compared to 84% in 2024. Similarly, strong agreement that customer service was excellent rose from 47% in 2017, to 59% in 2019 to 60% in 2024.

Agreement with statements about experience on Shetland – Leisure/VFR



Q43: Thinking of your experience in Shetland overall, to what extent do you agree or disagree with the following statements?

Base (All Leisure/VFR excl 'unsure' responses): 416 - 422

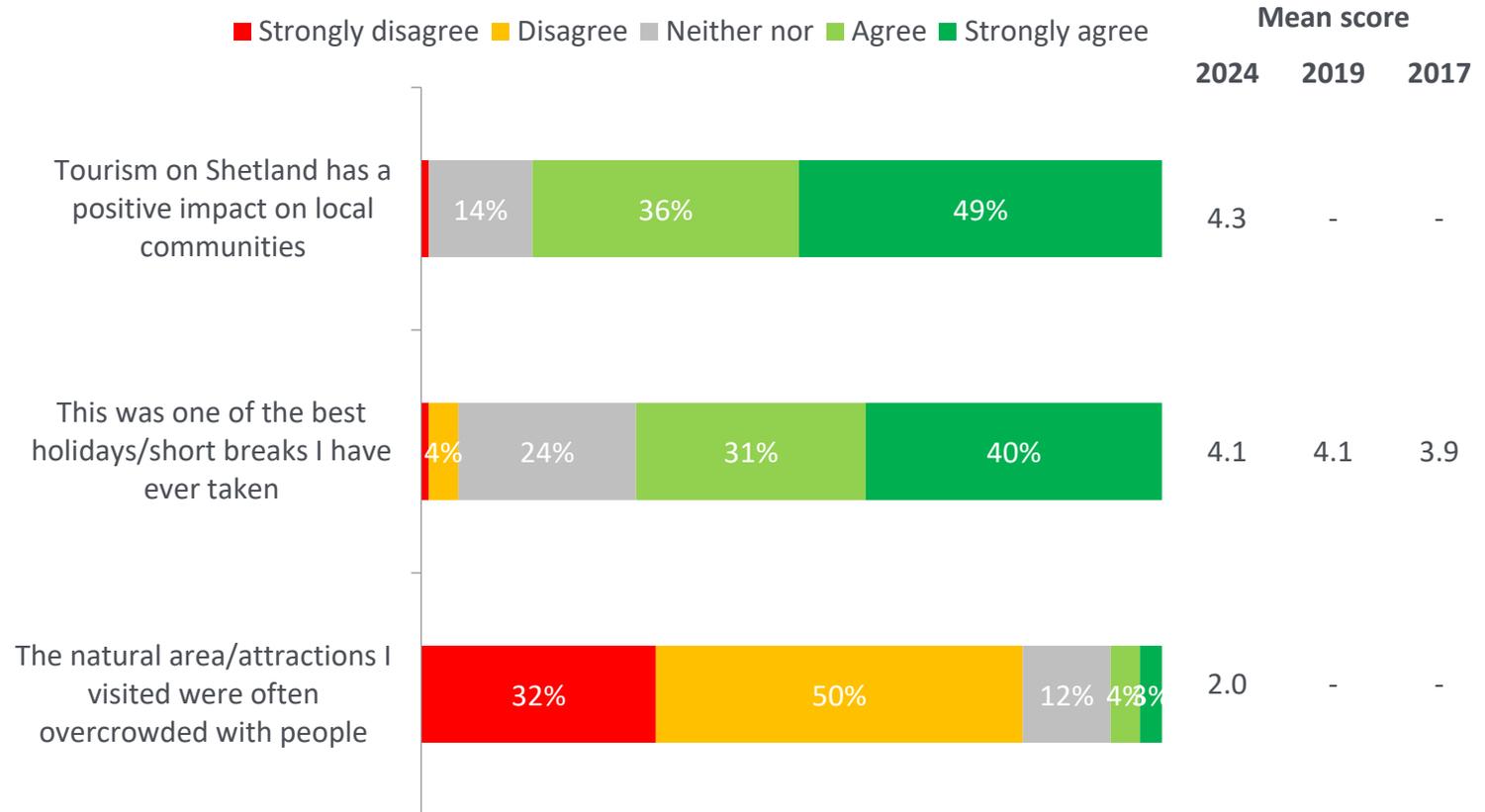
Trip evaluation

Overall experience

- Although the vast majority of Leisure and VFR visitors (86%) also agreed that tourism on Shetland has a positive impact on local communities, the strength of agreement was somewhat weaker than previous statements, with 49% agreeing strongly.
- Very few visitors were concerned about overcrowding in natural areas – only 7% agreed, while the majority (82%) disagreed this was a problem during their visit.
- Taking everything into consideration, seven in ten visitors agreed that their trip to Shetland was one of the best holiday/short breaks they had ever taken.
- The proportion agreeing that their visit was one of the best holidays/short breaks they had ever taken was relatively consistent with the surveys conducted in 2017 (67% agree; 33% strongly) and 2019 (75% agree; 41% strongly).
- Overseas visitors were more likely than those from Scotland to agree that their visit to Shetland had been one of the best holidays they had ever taken - 81% agreed, compared to 61% of Scotland visitors.



Agreement with statements about experience on Shetland – Leisure/VFR



Q43: Thinking of your experience in Shetland overall, to what extent do you agree or disagree with the following statements?

Base (All Leisure/VFR excl 'unsure' responses): 386 - 420

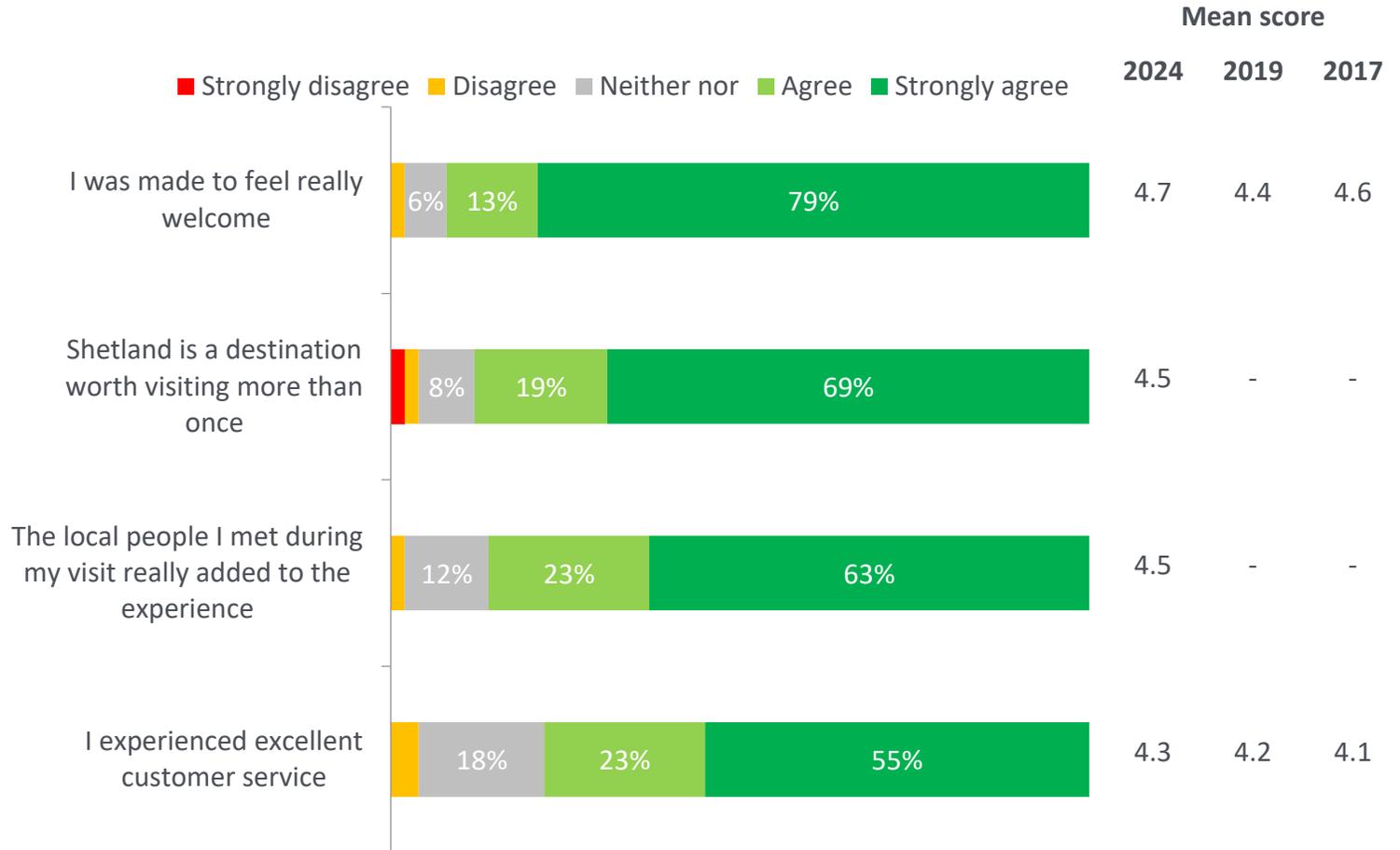
Trip evaluation

Overall experience

- Similar to the Leisure and VFR visitors, Business visitors were very positive about their interactions with local people during their visit to Shetland.
- Almost all Business visitors reported that they were made to feel welcome, and 78% agreed overall that they experienced excellent customer service, with 55% agreeing strongly.
- Furthermore, nine in ten Business visitors reported that the local people they met really added to the experience, with the majority (63%) agreeing strongly with this sentiment.
- Business respondents were also in strong agreement that Shetland is a destination worth visiting more than once.



Agreement with statements about experience on Shetland – Business



Q43: Thinking of your experience in Shetland overall, to what extent do you agree or disagree with the following statements?

Base (All Business excl rotational shift workers and 'unsure'): 52 - 53

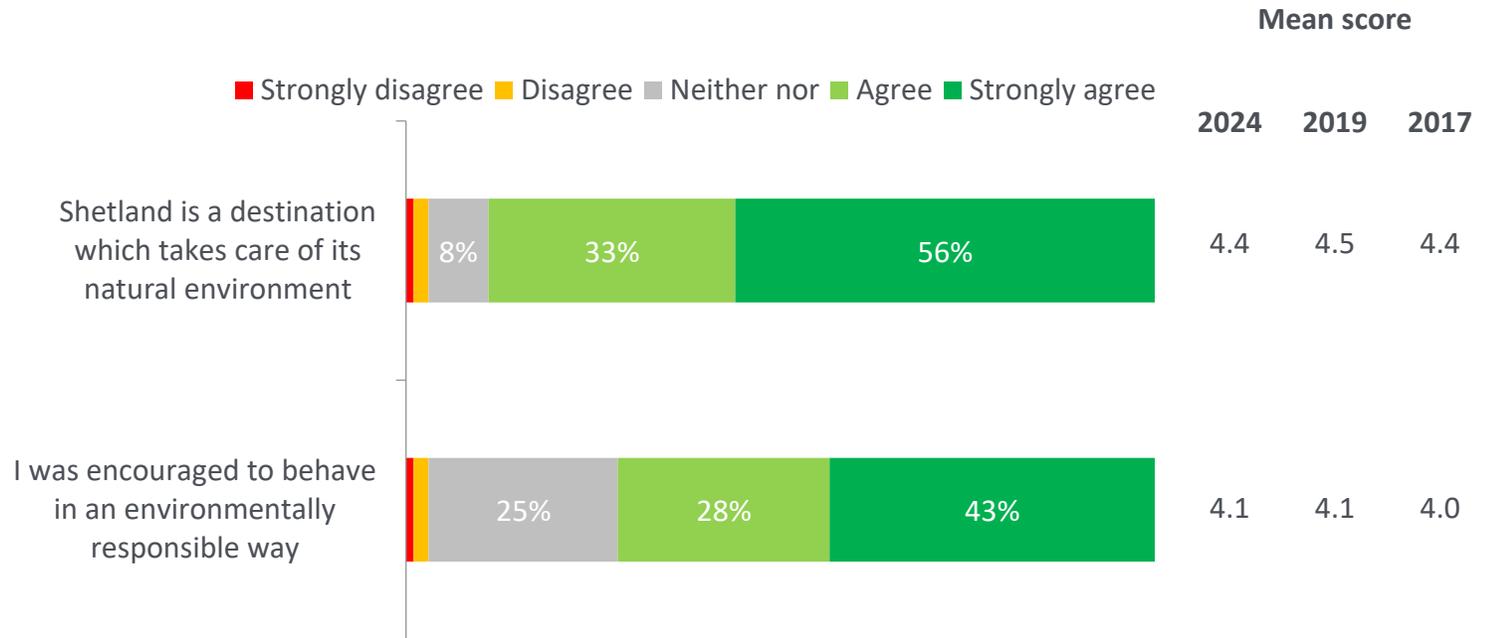


Trip evaluation

Overall experience

- The majority of visitors shared a perception that Shetland is an environmentally responsible destination. Indeed, nine in ten visitors agreed that Shetland takes care of its natural environment, with 56% agreeing strongly. This perception was consistent across Leisure, VFR and Business visitors.
- Seven in ten visitors (71%) also agreed that they were encouraged to behave in an environmentally responsible way during their visit. This perception was also consistent across Leisure (72%), VFR (75%) and Business visitors (63%).
- The data is broadly consistent with the 2017 and 2019 waves of the survey, although there was an increase in the proportion agreeing strongly that they were encouraged to behave in an environmentally friendly way – from 34% in 2017 and 36% in 2019 to 43% in 2024.
- Leisure visitors from overseas were more likely to agree that Shetland takes care of its natural environment (93%) than those from Scotland (78%). These visitors were also more likely to agree strongly that they were encouraged to behave in an environmentally friendly way (53%, vs 31% Scotland visitors).
- Female respondents were more likely to agree strongly that Shetland takes care of its environment (61%) than males (47%). Younger respondents (74% of under 45s) were also more likely to agree strongly with this statement than those aged 65+ (46%).

Agreement with statements about experience on Shetland – Environment



Q43: Thinking of your experience in Shetland overall, to what extent do you agree or disagree with the following statements?

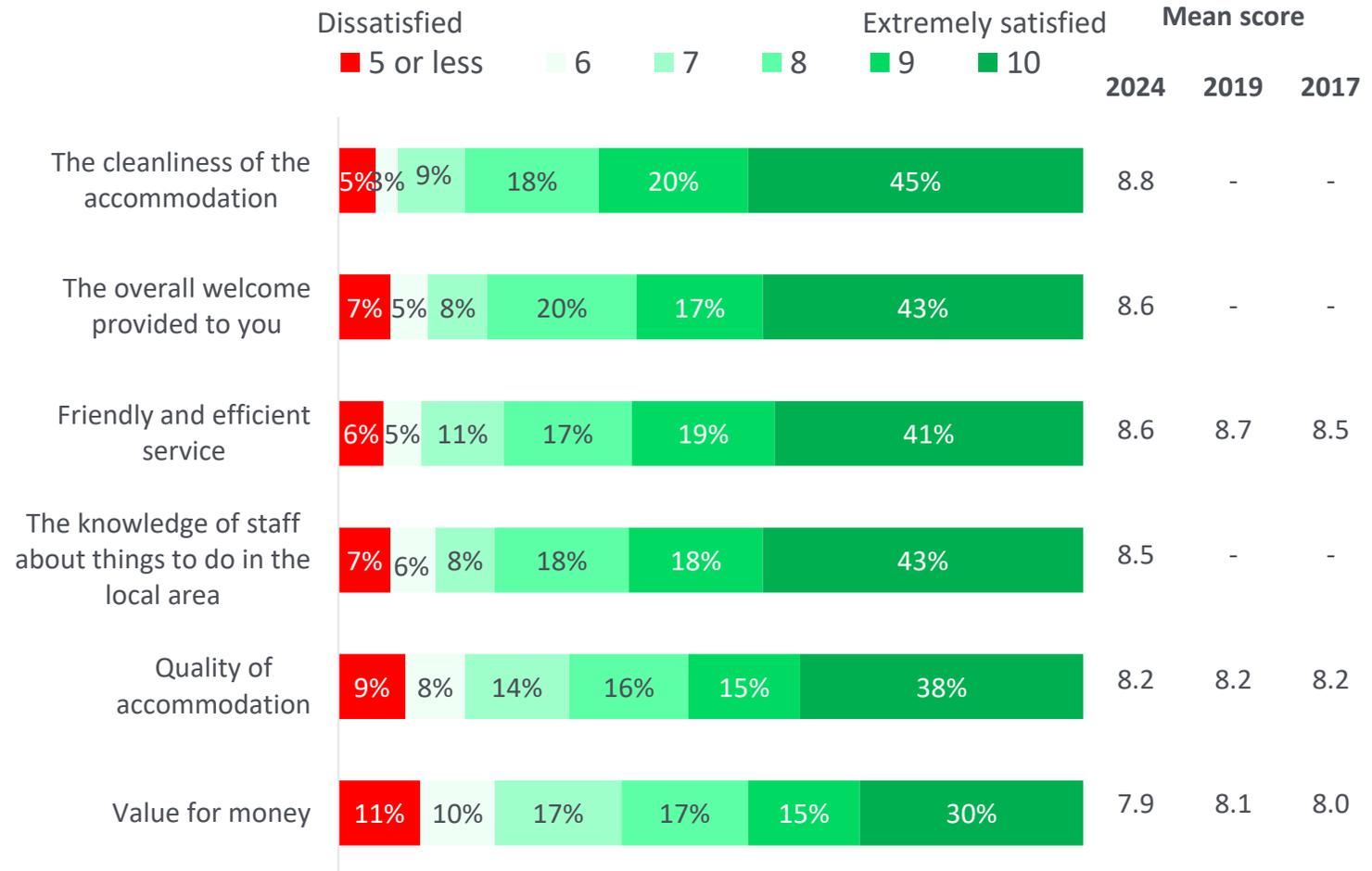
Base (All excl rotational shift workers and 'unsure'): 440 - 454

Trip evaluation

Accommodation

- Visitors who stayed in paid for accommodation were generally very satisfied with the quality, the staff/service and value for money of the accommodation, with all aspects scoring eight out of ten or above on average.
- The highest scores were awarded to the cleanliness of accommodation (65% scoring nine or ten) and service received from staff, including the welcome (60%), friendliness and efficiency (61%) and local knowledge (61%).
- The majority of visitors also rated the quality of their accommodation and value for money positively, but they were less likely to provide a high score of nine or ten (quality 52%; value 45%) and around one in ten respondents provided a score of five or less.
- Perceptions of the quality and value of accommodation have been fairly stable over the three waves of the survey.
- Business visitors reported lower levels of satisfaction with all aspects of accommodation, compared to Leisure visitors.

Satisfaction with accommodation



Q44: Thinking about the accommodation you stayed in, how satisfied were you with the following aspects of your accommodation?

Base (All staying in paid accommodation excl 'unsure'): 262 - 368

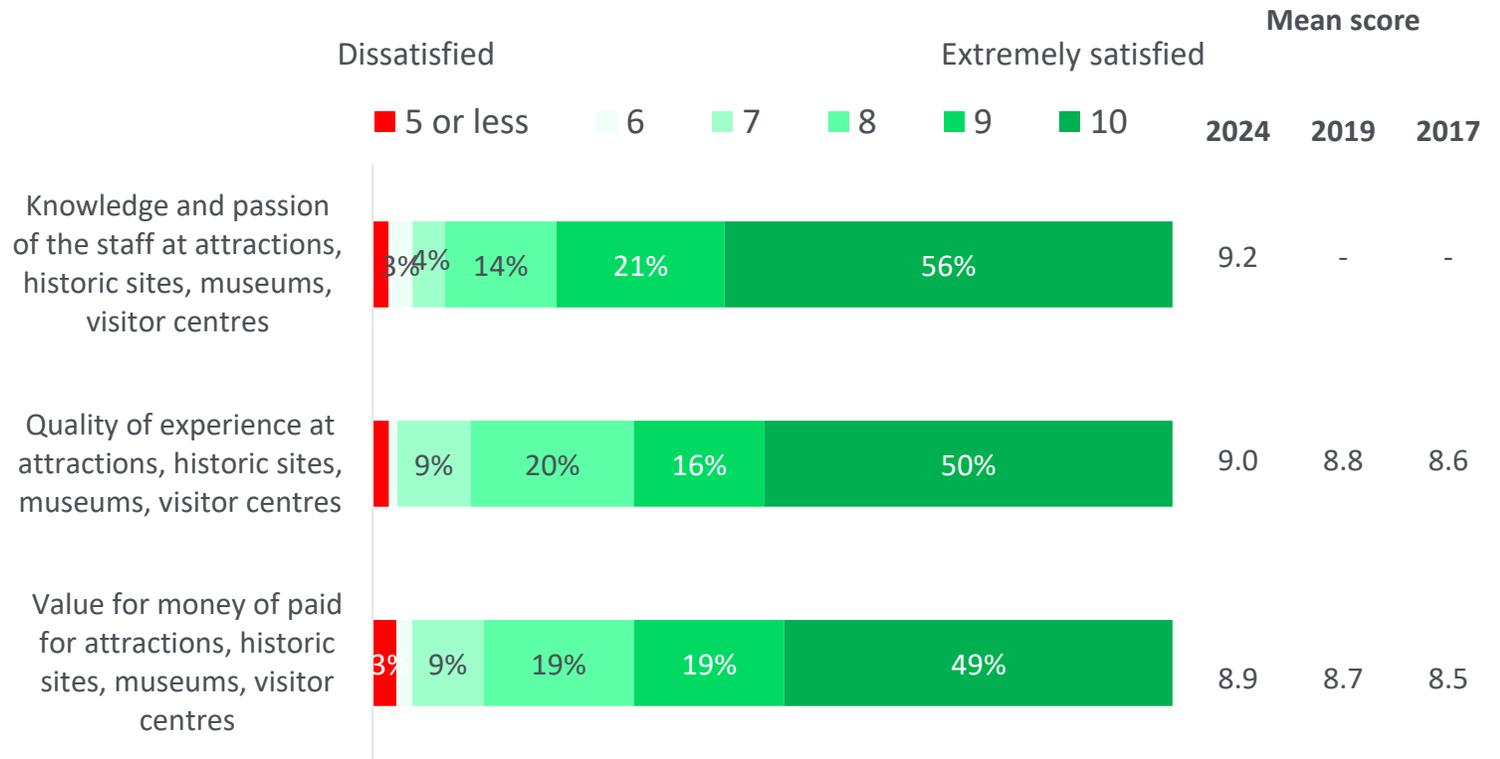
Trip evaluation

Visitor attractions

- High levels of satisfaction were reported by visitors in relation to attractions, historic sites, museums and visitor centres.
- On average, the staff, the quality of experience and value for money were all rated as nine out of ten in terms of satisfaction.
- All three aspects were rated fairly evenly, however, the knowledge and passion of staff was the highest rated aspect, with 77% rating their satisfaction with this in the top two boxes (nine or ten).
- There has been a marked improvement in perception of the quality and value for money of visitor attractions since 2019, when 37% and 38% respectively gave the highest score of ten.
- Leisure visitors from Europe tended to demonstrate slightly lower levels of satisfaction than those from the UK or other overseas countries. For example, 39% gave a nine or ten score for quality of experience, compared to 77% for North American visitors, and 72% and 70% respectively of those from Scotland and the rest of the UK. Similarly, only 51% of European visitors scored in the top two boxes for value for money.



Satisfaction with attractions, historic sites, museums, visitor centres



Q45: Thinking about the activities you did and the attractions you visited, overall how satisfied or dissatisfied were you with the following?

Base (All excl Business visitors that did not visit an attraction and 'unsure'): 341 - 373

Trip evaluation

Activities/experiences

- Similar to ratings for attractions, the majority of visitors were also very satisfied with the activities and experiences they took part in during their trip to Shetland.
- Again, the service from staff was the highest rated aspect, with 78% of respondents scoring the knowledge and passion of staff at activity/experience providers as a nine or ten out of ten.
- The quality of the experience (73% nine or ten) and value for money (66%) were also highly rated by the majority of visitors.
- Leisure visitors from Scotland were more likely to rate the knowledge and passion of staff nine or ten (88%), than visitors from overseas (70%).
- Similar to the findings for attractions, Leisure visitors from Europe tended to be less satisfied with the quality of experience (51% top two boxes), the value for money (39%) and the knowledge and passion of staff (51%) compared to people from the UK and other overseas countries.

Satisfaction with activities or experiences



Q45: Thinking about the activities you did and the attractions you visited, overall how satisfied or dissatisfied were you with the following?

Base (All excl Business visitors that did not visit an attraction and 'unsure'): 311 - 336

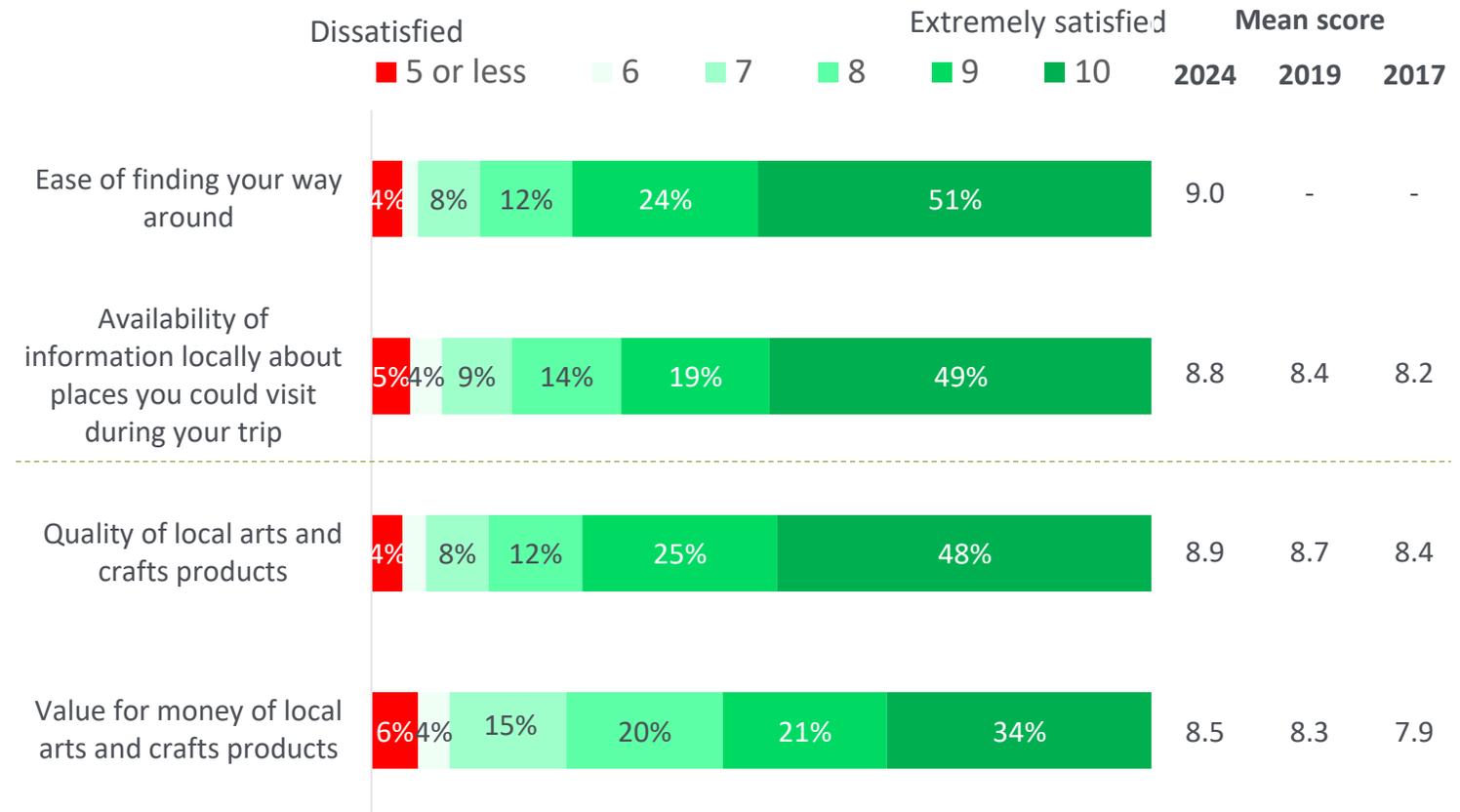
Trip evaluation

The local area

- Local information was considered very satisfactory by the majority of visitors. In total, 74% rated the ease of finding their way around with nine or ten out of ten, while 68% provided a similarly high rating for the availability of information locally about places you could visit.
- There has been an increase in satisfaction with the availability of information locally compared to 2019, when only 31% gave a score of ten.
- There were also high levels of satisfaction with local arts and crafts products, although respondents were more likely to provide a high rating for the quality of these products (73% nine or ten) than the value for money (55%).
- Respondents in 2024 were more likely to give a score of ten for arts and crafts products than in 2019, when 39% rated the quality with a ten and 25% provided a similarly high rating for value.
- Overseas visitors were slightly less likely to rate the ease of finding your way around as nine or ten (70%) compared to visitors from the rest of the UK outside Scotland (82%)*.
- Again, visitors from Europe tended to provide lower satisfaction scores, particularly in comparison to those from North America and the rest of the UK.

*Significant at 90% level.

Satisfaction with information and arts and crafts products



Q45: Thinking about the activities you did and the attractions you visited, overall how satisfied or dissatisfied were you with the following?

Base (All excl Business visitors that did not visit an attraction and 'unsure'): 324 - 394

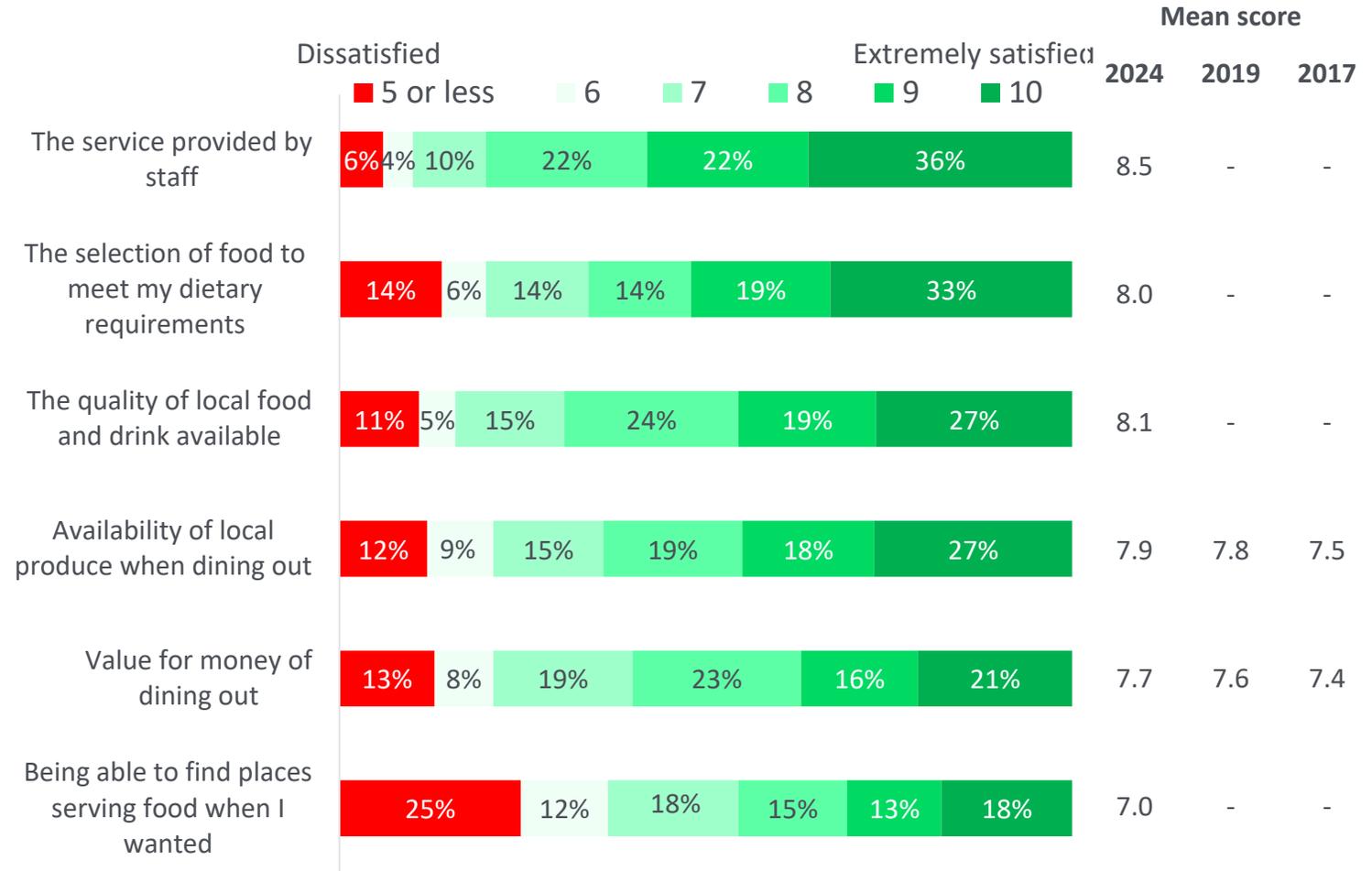
Trip evaluation

Food and drink

- Respondents were also asked to rate various aspects of food and drink available on Shetland during their visit. As with other aspects of the trip experience, food and drink experiences tended to be rated very positively.
- Once again, the staff visitors encountered received the highest ratings. In total, 58% scored the service provided by staff in the top two boxes, which, whilst very high, is lower than the ratings provided for staff in accommodation, attractions and activity experiences.
- The quality of the food was also well received by the majority of respondents, with around half rating the selection of food to meet dietary needs (52%), the quality of local food and drink (46%) and the availability of local produce when dining out (45%) with a nine or ten. Nevertheless, ratings were lower than for accommodation, attractions and activities, and more than one in ten provided a negative rating.
- The lowest rated aspects of food and drink for visitors were value for money and being able to find places serving food when they wanted. Only 37% and 30% respectively scored these with a nine or ten, while a quarter of visitors gave a negative rating for being able to find places serving food when they wanted.
- As noted previously, Leisure visitors from Europe provided lower satisfaction scores, particularly in relation to value (19% top two boxes) and availability of local produce (28%).



Satisfaction with experiences of food and drink



Q46: Thinking about your experiences of food and drink during your holiday or short break in Shetland, overall, how satisfied or dissatisfied were you with the following?

Base (All excl rotational shift workers and 'unsure'): 298 - 456

Trip evaluation

Recommendation

- Leisure and VFR visitors were asked if they would recommend Shetland as a holiday destination to friends and family. This question allows us to calculate the Net Promoter Score (NPS) which is commonly used across different industry sectors.
- It is a reflection of the quality of the visitor experience that almost all reported that they would recommend Shetland. Indeed, 70% gave a perfect ten out of ten recommendation score and the NPS was 83. For comparison, the NPS for the whole of Scotland measured in the 2023 Scotland Visitor Survey was 80.
- Both Leisure and VFR visitors were very likely to recommend Shetland, although Leisure visitors were more likely to score nine or ten (promoters – 87%) than VFR visitors (75%).
- There were no statistically significant differences in likelihood to recommend Shetland across Leisure visitors from Scotland, the rest of the UK or overseas.

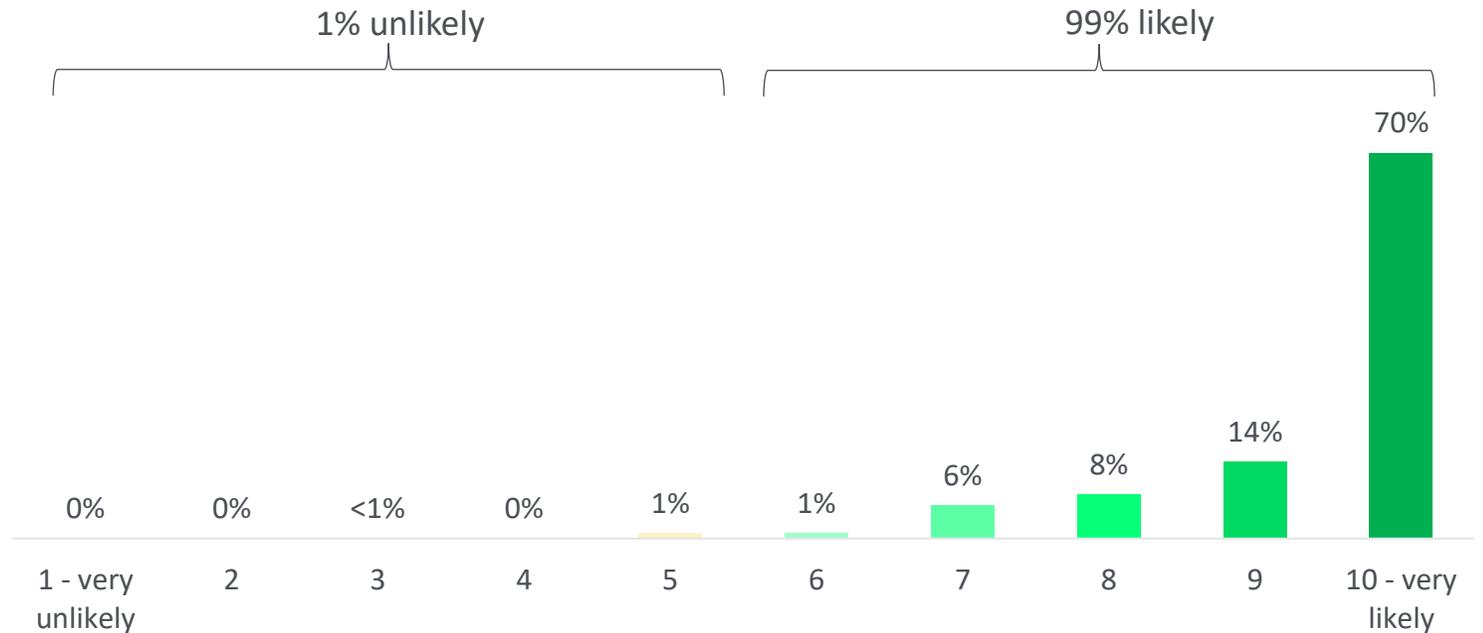
Net Promoter Score (NPS) is calculated by subtracting detractors (scores of 1-6) from promoters (scores 9-10). NPS scores range from -100 to +100.

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

progressive

Net Promoter Score: 83

Mean score (Total): 9.4
Means scores - Leisure: 9.5; VFR: 9.2



Q47: 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?

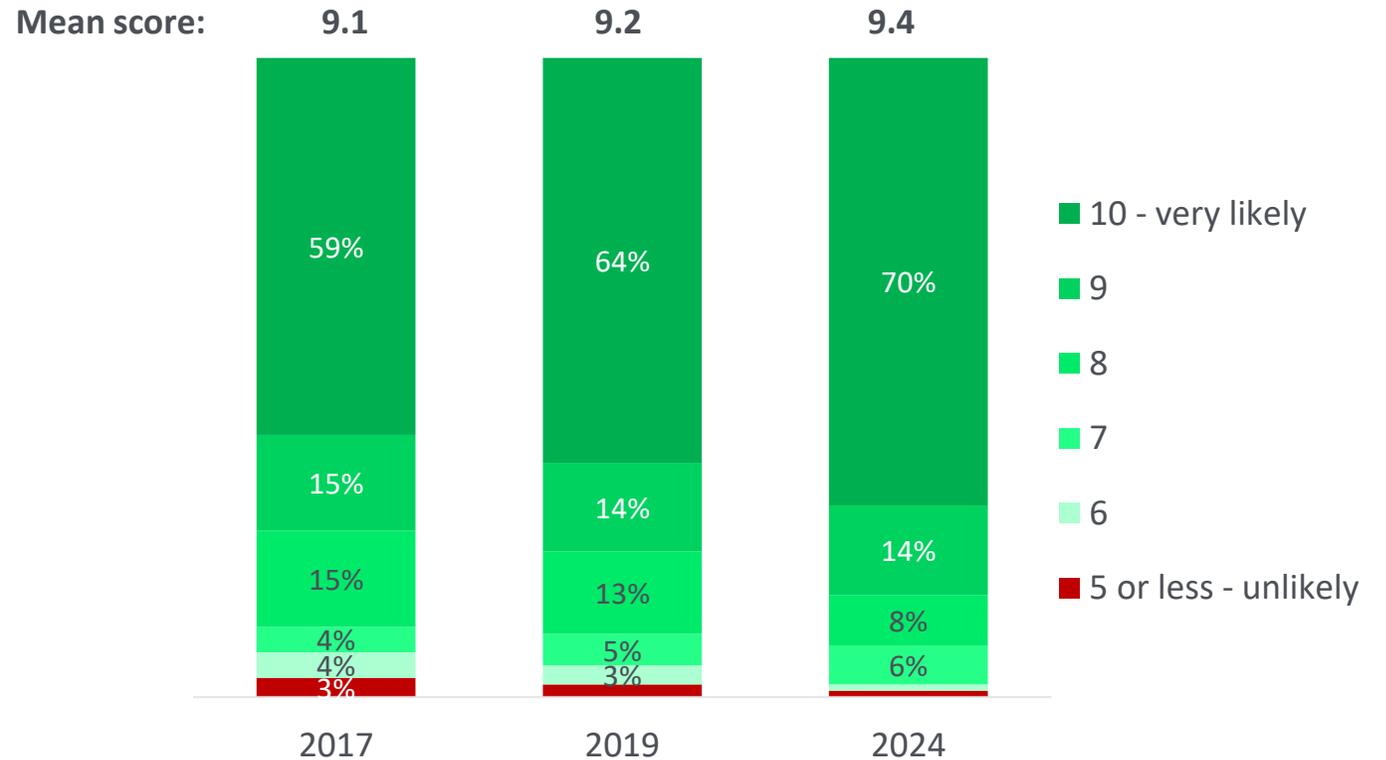
Base (All Leisure/VFR, excl 'unsure'): 431

Trip evaluation

Recommendation

- Over the three waves of the study there has been an increasing propensity to recommend Shetland as a holiday destination.
- In 2017, three quarters (74%) of Leisure/VFR visitors scored in the top 2 boxes, with 59% giving a ten out of ten. This increased to 84% top two boxes by 2024, with 70% scoring ten out of ten.

Likelihood to recommend Shetland as a holiday or short break destination



Q47: 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?

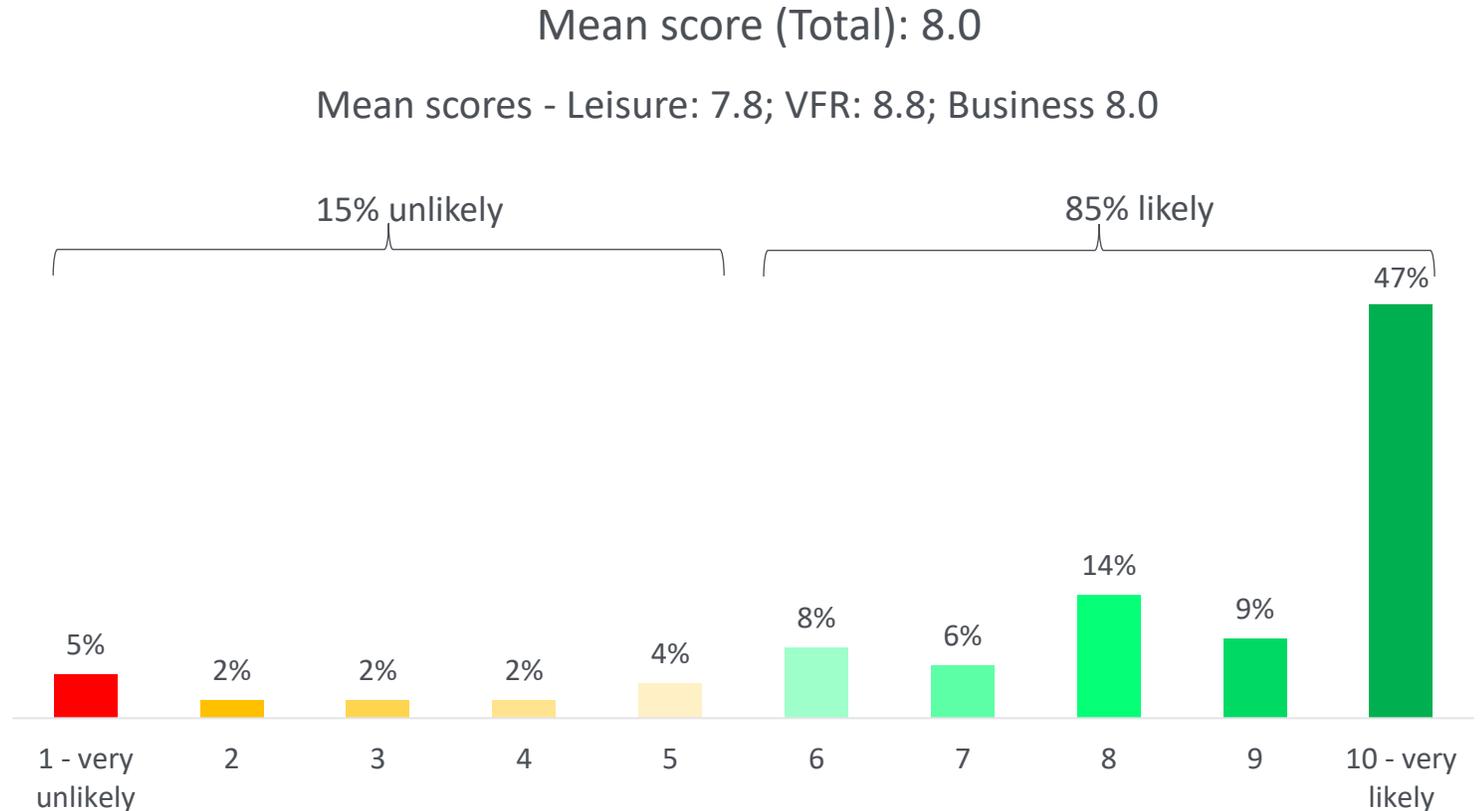
Base (All Leisure/ VFR, excl 'unsure'):
2024: 431; 2019: 318; 2017: 595

Trip evaluation

Return visit

- When asked how likely they were to return to Shetland for a short break or holiday in the next five years, the majority of visitors responded positively - 85% scored six or more out of ten, with 47% scoring ten out of ten indicating that it is highly likely.
- Reflecting the findings from previous waves, and as we would expect, VFR visitors were the most likely to anticipate a return visit (66% scored ten; mean score 8.8).
- Given the mix of domestic and international visitors within the Leisure sample, it is not surprising that propensity to return is slightly lower than for VFR visitors. However, this group was also very likely to express an intention to return, as noted in the data detailed over.

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



Q48: Based on your experiences during this trip, how likely are you to visit Shetland in the next five years for a leisure holiday or short break?

Trip evaluation

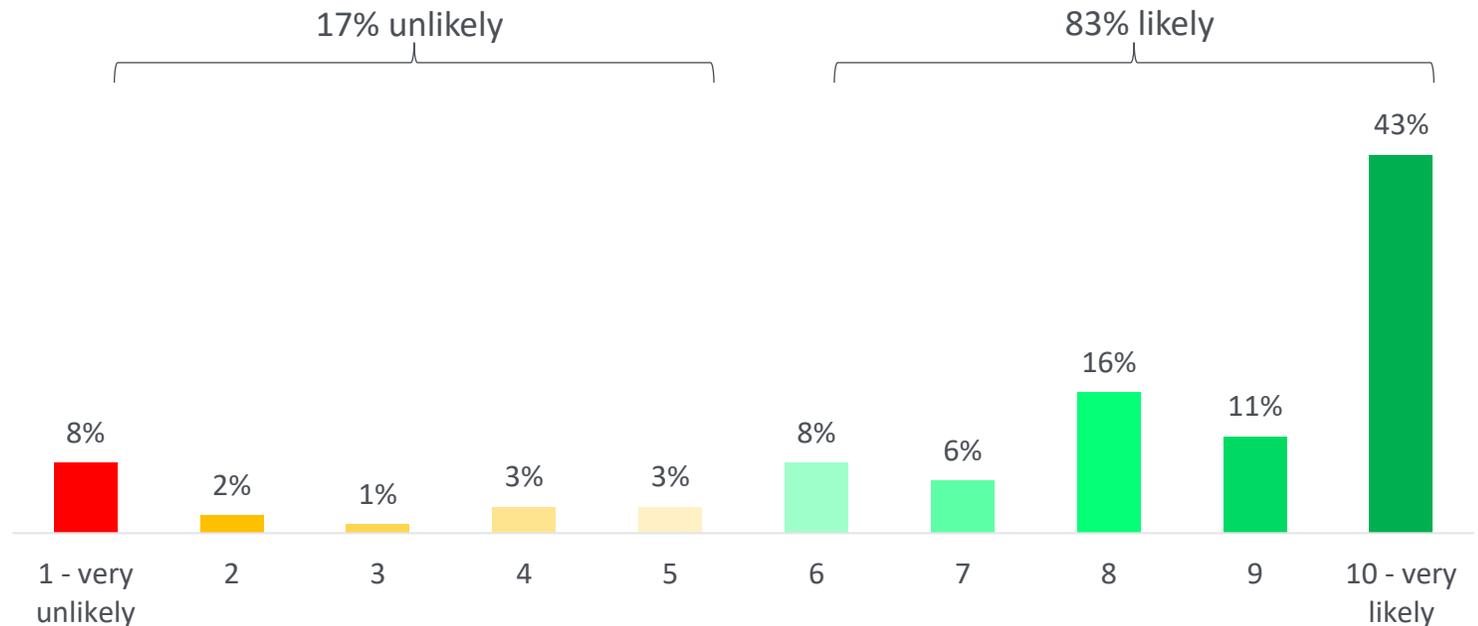
Return visit

- Over four fifths of Leisure visitors considered it likely that they would return to Shetland within five years, giving a score of six or more. In 2024, the propensity of Leisure visitors to return to Shetland again was very similar to 2019 and 2017, when 80% and 84% respectively scored six or more.
- Perhaps unsurprisingly, overseas visitors were less likely to provide a score of ten (32%), compared to Scotland (58%) and rest of UK (47%) visitors.



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

Mean score (Leisure): 7.8



Q48: Based on your experiences during this trip, how likely are you to visit Shetland in the next five years for a leisure holiday or short break?

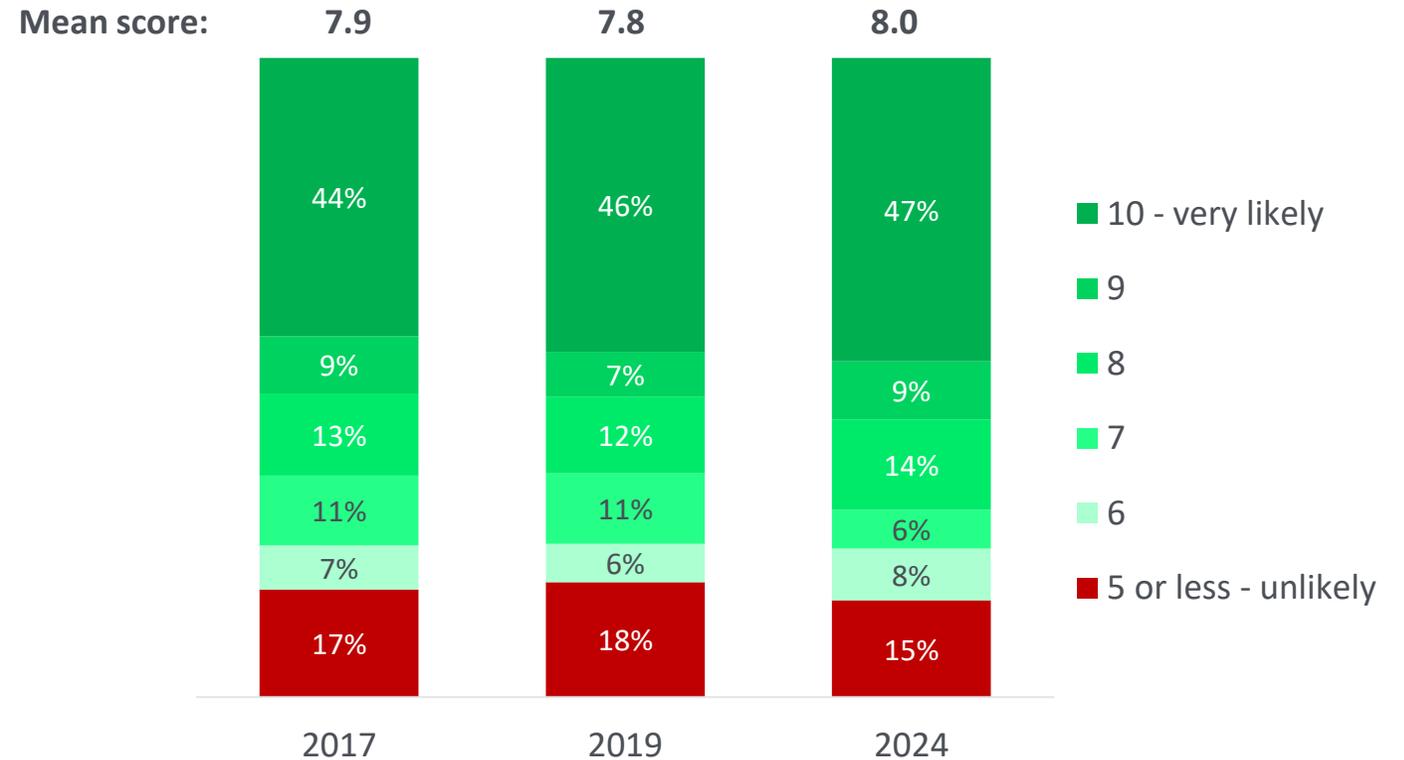
Base (All Leisure visitors excl 'unsure'): 321

Trip evaluation

Return visit

- Likelihood to return to Shetland in 2024 was very similar to the sentiments expressed in 2017 and 2019.
- Across all three waves of the survey just over half of respondents scored a nine or ten in terms of their likelihood to take a holiday or short break in Shetland in the next five years.
- Correspondingly, the proportion who consider a return visit in the next five years unlikely, has been consistently around 15% to 18%.

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



Q48: Based on your experiences during this trip, how likely are you to visit Shetland in the next five years for a leisure holiday or short break?

Base (All excl 'unsure'): 2024: 467; 2019: 353; 2017: 713

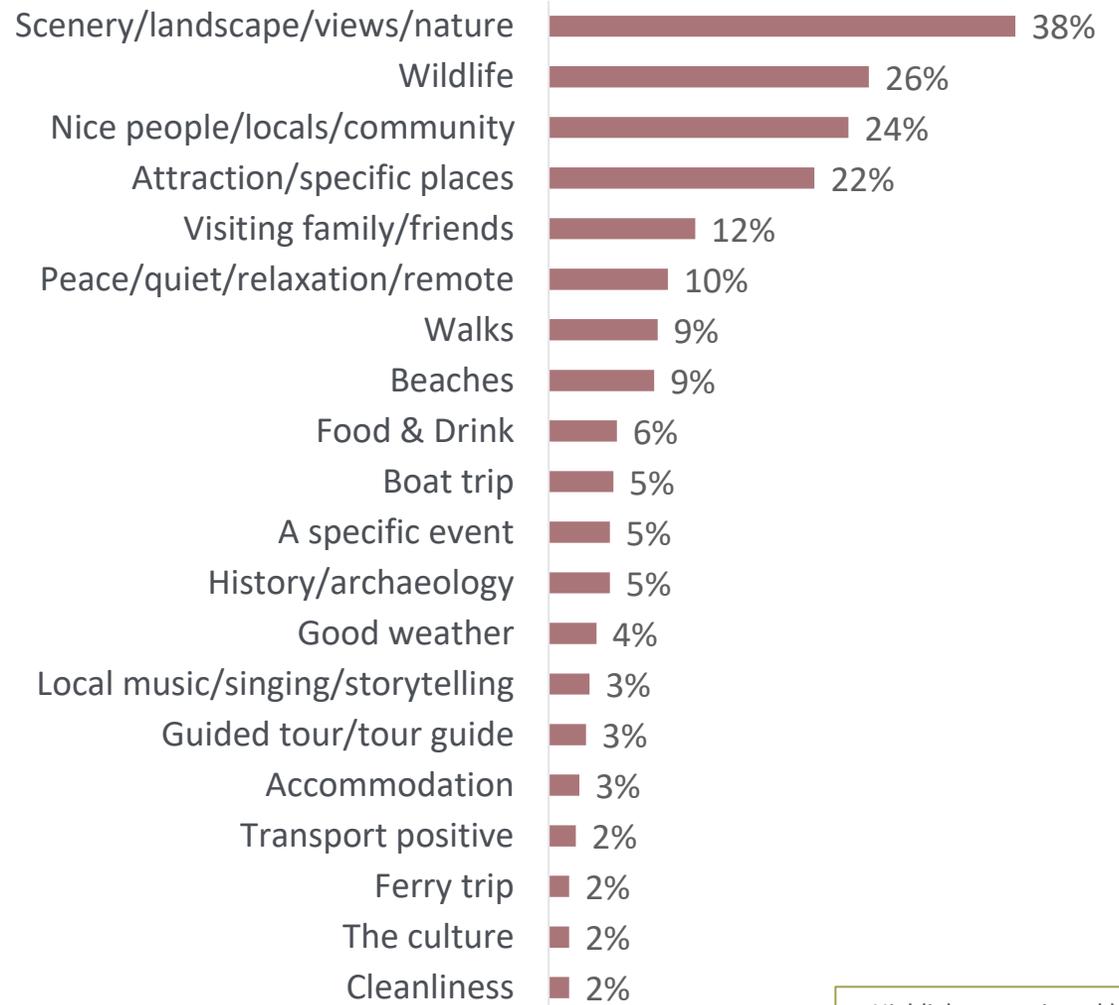
Trip evaluation

Highlight

- When asked to specify, in their own words, the highlight of their trip to Shetland, Leisure/VFR visitors tended to talk about the natural beauty of the islands, the abundant wildlife, and the opportunity to be outdoors and find peace and relaxation.
- The friendliness and helpfulness of local people was also a highlight mentioned by many. Respondents spoke about local people being friendly, kind, warm and helpful.
- Specific attractions and places mentioned included Jarlshof, Broch of Mousa, St Ninians beach and Hermaness.
- The highlights mentioned in 2024 were very similar to those mentioned in 2017 and 2019.



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



Highlights mentioned by less than 2% are not shown

Q50: What was the highlight of your visit to Shetland or the single thing that you enjoyed or appreciated most?

Trip evaluation

Highlight – examples of verbatim comments

I appreciated the history, especially the Broch of Clickimin and Jarlshof.

I enjoyed the people. Everyone was friendly and helpful and kind to each other in person and on the road. The scenery was spectacular and of course the puffins.

Driving around seeing all the beautiful sights: beaches, ponies, sheep, cliffs, rolling green hills, and wildlife. Just awesome beauty around every corner. And the four dinners we had at four different restaurants were delicious.

Seals and Seabirds trip to Noss and Bressay especially the Gannets and Great Skewers.

This visit the highlights were too numerous to pick just one - so sunny Minn beach, walking round the headland at Kettla Ness and an interesting chat with the local sheep farmer, excellent breakfasts at Da Haaf Scalloway, and a fascinating visit onboard The Swan.

We enjoyed the beauty of the scenery and how well looked after the whole of Shetland is.

Quendale Water Mill is a "hidden gem" in a beautiful location.

Isle of Mousa with its outstanding Broch and the wildlife there were the thing that made me visit Shetland, but I also really like Unst with its nice beaches, its birdlife and the very interesting geological formations. I wished I could have stayed longer. Another thing I really liked was the Stanydale temple and the area around it, especially because of the many Curlews we were able to see there.

The beaches: the beauty of Skaw beach made me cry! The tombolos are remarkable. The Grand Hotel is incredible: guaranteed to last. A very strong emotion when seeing an otter. Hermaness is indescribable: wonderful!

Live music at The Lounge during folk festival, the kindness of locals and the lack of people at most beaches .

It was quiet during the night, not crowded all the time, very friendly people, and a beautiful landscape, nice driving around. I would love to visit Shetland again during the wool week.

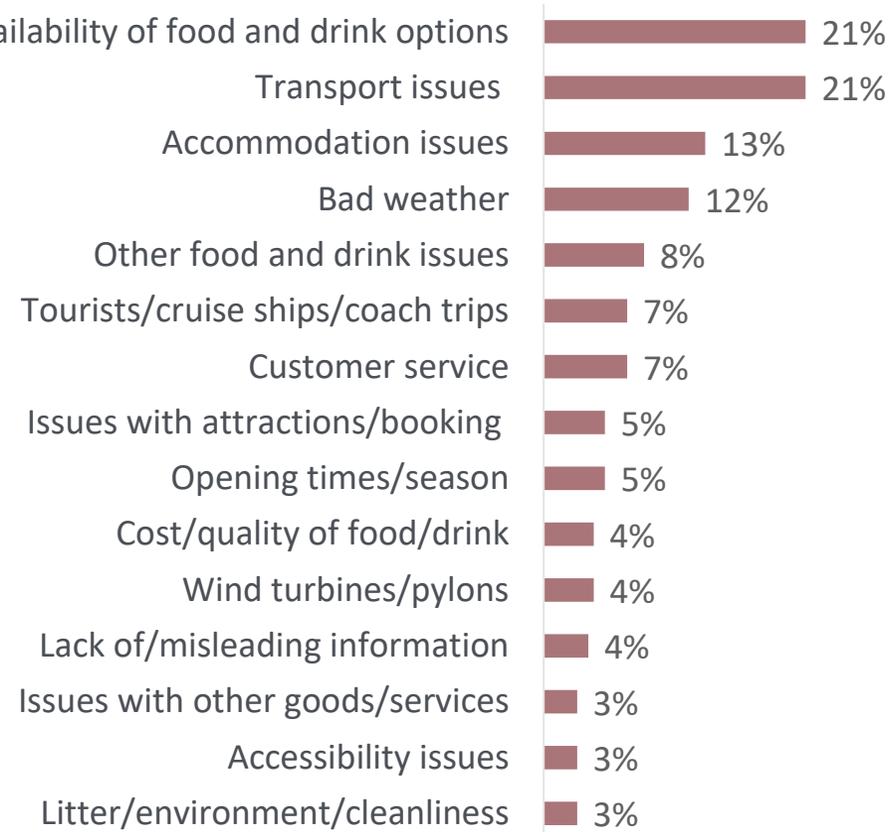
The whole experience - scenery, nature, people, - was a highlight.

Trip evaluation

Negative Experience

- In total, 44% of respondents made a comment when asked to state if anything had negatively impacted their experience.
- No individual complaint stood out as being a problem for a large proportion of visitors; instead a number of separate concerns were highlighted.
- The most frequently mentioned issues that had a negative impact on visitors' experience were the availability of food and drink options (21%), transport issues (21%), accommodation issues (13%) and bad weather (12%).

Negative experience during the visit (open-ended)



Issues mentioned by less than 3% are not shown

Q51: Was there anything you encountered during your visit to Shetland that impacted negatively on your visitor experience?

Base (All who gave a response, excl rotational shift workers): 220

Trip evaluation

Negative experience – examples of verbatim comments

Inability to find a coffee shop in Lerwick on Sunday morning. Lack of eating establishments out with the main centre(s) of population.

I've visited Shetland many times to see family, there is always a lack of restaurants that have local produce, such as seafood. Also, overall customer service on the island is poor.

Number of coffee shops, restaurants which are not in the hotel, quality of hotels, availability of high quality hotels, prices are high in relation to offered quality.

The only disappointment was how difficult it was to get a table at a restaurant. We had fish and chips on a bench on our second night and would have preferred a nice restaurant meal. It was hard to book in advance before we arrived, but we struggled to book for our second and third day from the day we arrived. From what we saw of people being turned away from restaurants I know we weren't the only ones.

The quality of accommodation needs reviewed, not sure that all the three star hotels would obtain three stars elsewhere in Scotland.

The restaurants do not serve local fish, except for fish and chips.

Hotels in Lerwick are very expensive and not good quality. In general lack of accommodation.

Few pubs, hard to find places to eat, abandoned hotel with no staff.

The lack of reasonable priced (and modern) accommodation meant unable to stay more than one night- also the expense of the ferry meant that the experience was more like an expensive treat - rather than a regular thing.

Discarded fishing paraphernalia washed up on various beaches e.g. nets, nylon rope, plastic floats and other items such as plastic bottles and polystyrene. Some locations had a considerable accumulation of litter which had clearly been there for some considerable time.

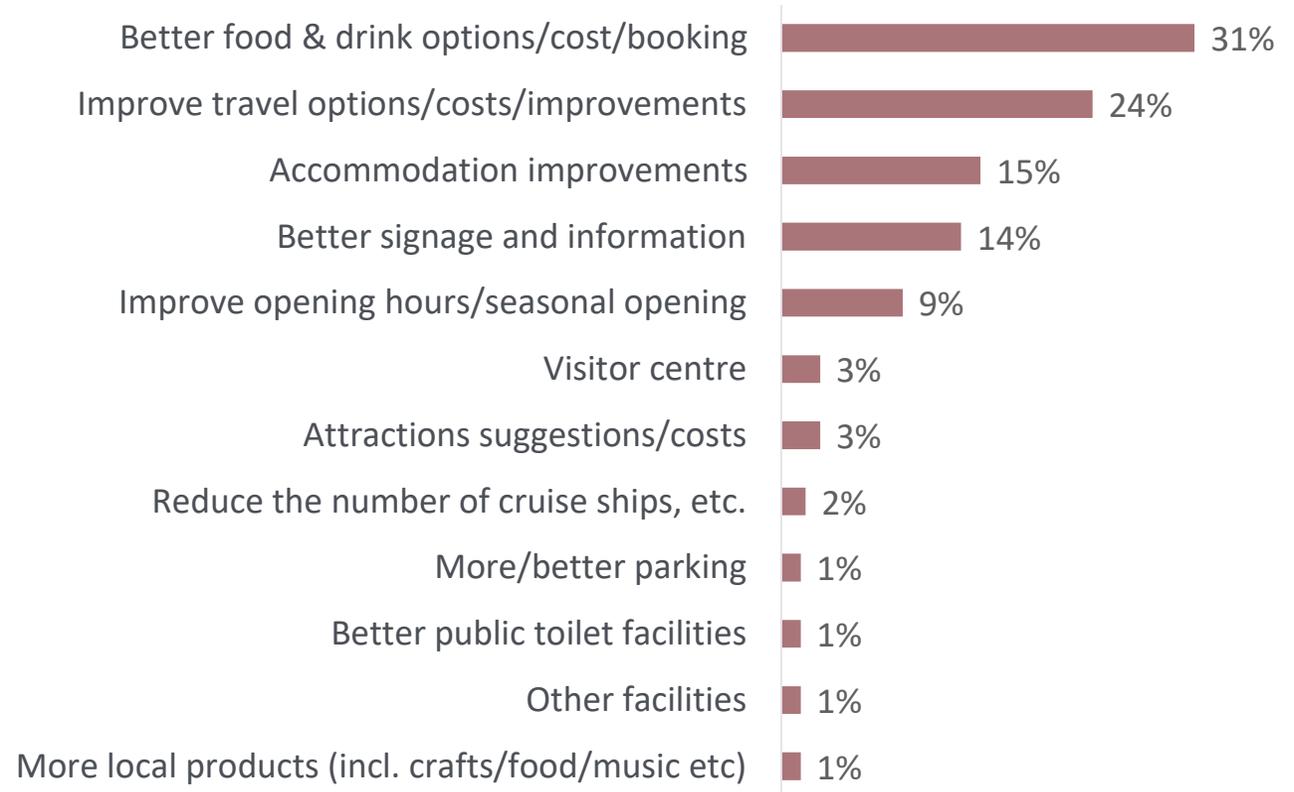
Apart from Scalloway site, the quality and facilities at sites for campervan/motorhome was poor. We did not stay in 2 places we had booked because facilities so poor.

Trip evaluation

Improvements

- When asked about suggesting an improvement that would have enhanced their trip to Shetland, 54% gave a response.
- Of those who responded, the most requested improvement, mentioned by three in ten, related to food and drink options. These comments included:
 - More restaurants and better range of restaurants (limited options made booking essential)
 - Longer opening hours, especially in evenings, Sundays, off-peak season
 - Better quality food
 - More cafes, places for coffee
 - More pubs
- A number of visitors also suggested improvements to transport/travel:
 - More reliable ferries/flights, fewer cancellations etc.
 - More public transport/buses
 - Better/clearer information on bus timetables
 - Cheaper flights/ferries to Shetland

Suggested improvements (open-ended)



Suggestions mentioned by less than 4 people are not shown

Q52: What one improvement would have enhanced your visit to Shetland?

Base (All who gave a response, excl rotational shift workers): 271

Trip evaluation

Improvements – examples of verbatim comments

To make visitors aware of how they can find out opening hours of places to eat and drink or ideally have one place for information/notice board for opening hours.

A lot of restaurants in Lerwick required reservations or were fully booked. With a family, walk-ins are easier, but it was impossible for us to do so because all seats were booked.

I never did figure out how/if public transit worked on the Shetland islands, so more info here might have been useful.

The ferries between islands were not running smoothly to a set regular schedule with staff shortages.

We felt that the presence of 3 large cruise ships at Lerwick at the same time was unpleasant with the town too full of people and difficult to get around. We understand that the economic benefit to Shetland of the cruise ship visitors is important, but it would be best if it could be managed to avoid the overcrowding that occurred.

Restaurants/bars closed earlier than expected on the weekend, was hard to find a place for dinner Saturday/Sunday, after a day of sightseeing.

I was very unimpressed by the number of restaurants that refused me service as a single diner for an evening meal.

Much more information on "green travel", i.e. getting around without a car but a lot of luggage.

More frequent bus service and maybe busses transporting bikes.

It would be good if there was a cafe in the South Mainland - I was visiting Sumburgh Head and Jarlshof on Saturday afternoon, and I was shocked that there was nowhere open to get soup and a cake.

The availability and choice of restaurants outside of Lerwick is very limited. We were lucky that our 1st Hotel at Busta was good and the guest house we stayed on Unst provided food. When staying on the South Mainland (Bigton) we had to drive into Lerwick on a number of occasions.

More cafes or tearooms!

Trip evaluation

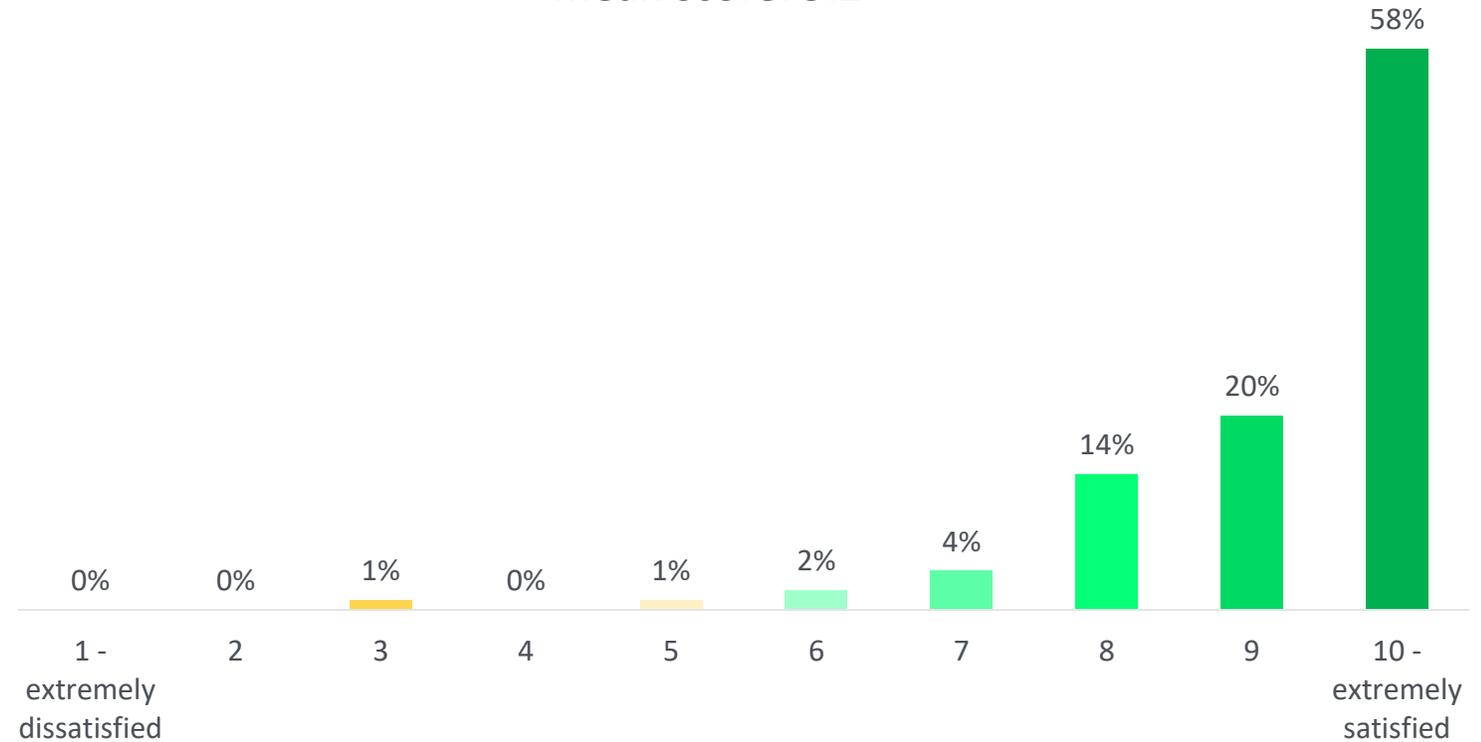
Overall satisfaction

- When asked to rate how satisfied they were with their overall visit to Shetland, respondents provided highly positive scores; 78% of respondents gave a score of nine or ten, with most (58%) scoring their visit with a perfect ten out of ten.
- This high level of satisfaction was reflected across all visitor types, however, Leisure (84%) and VFR (85%) visitors were more likely to score nine or ten than Business visitors (57%), as detailed over.

Satisfaction with visit to Shetland



Mean score: 9.2



Q49: Overall, how satisfied were you with your visit to Shetland?

Base (All excl 'unsure'): 499

Trip evaluation

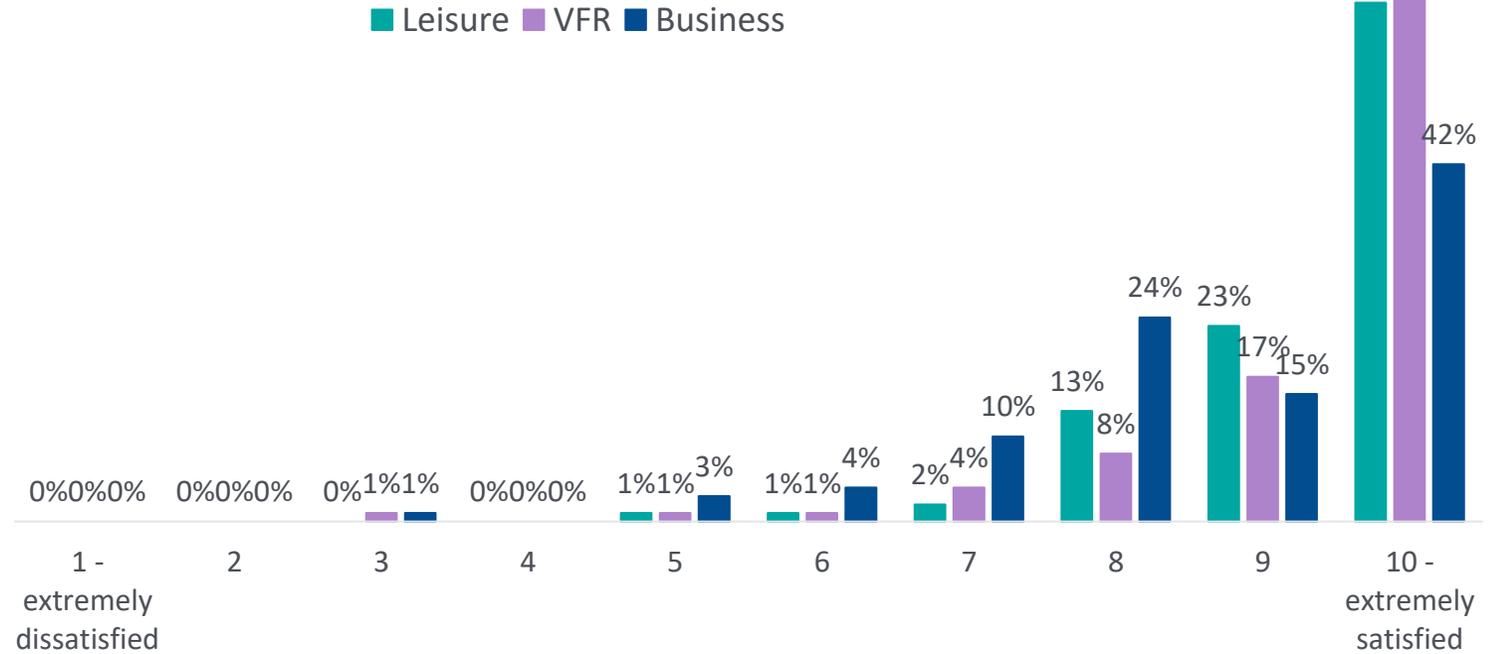
Overall satisfaction

- Leisure and VFR visitors had high levels of satisfaction with their trip, with 61% and 68% respectively scoring it with a perfect ten out of ten.
- Perhaps unsurprisingly, Business visitors were slightly less enthusiastic, although the majority were satisfied (57% scored nine or ten).
- Within the sample of Leisure visitors, there were no statistically significant differences in overall satisfaction across Scotland, rest of UK and overseas visitors. Repeat visitors were more likely to score ten (72%) than first time visitors (56%).
- Female Leisure visitors were more likely to score ten (65%) than males (52%). There were no differences by age groups.

Satisfaction with visit to Shetland



Mean scores: Leisure 9.4; VFR 9.4; Business 8.6



Q49: Overall, how satisfied were you with your visit to Shetland?

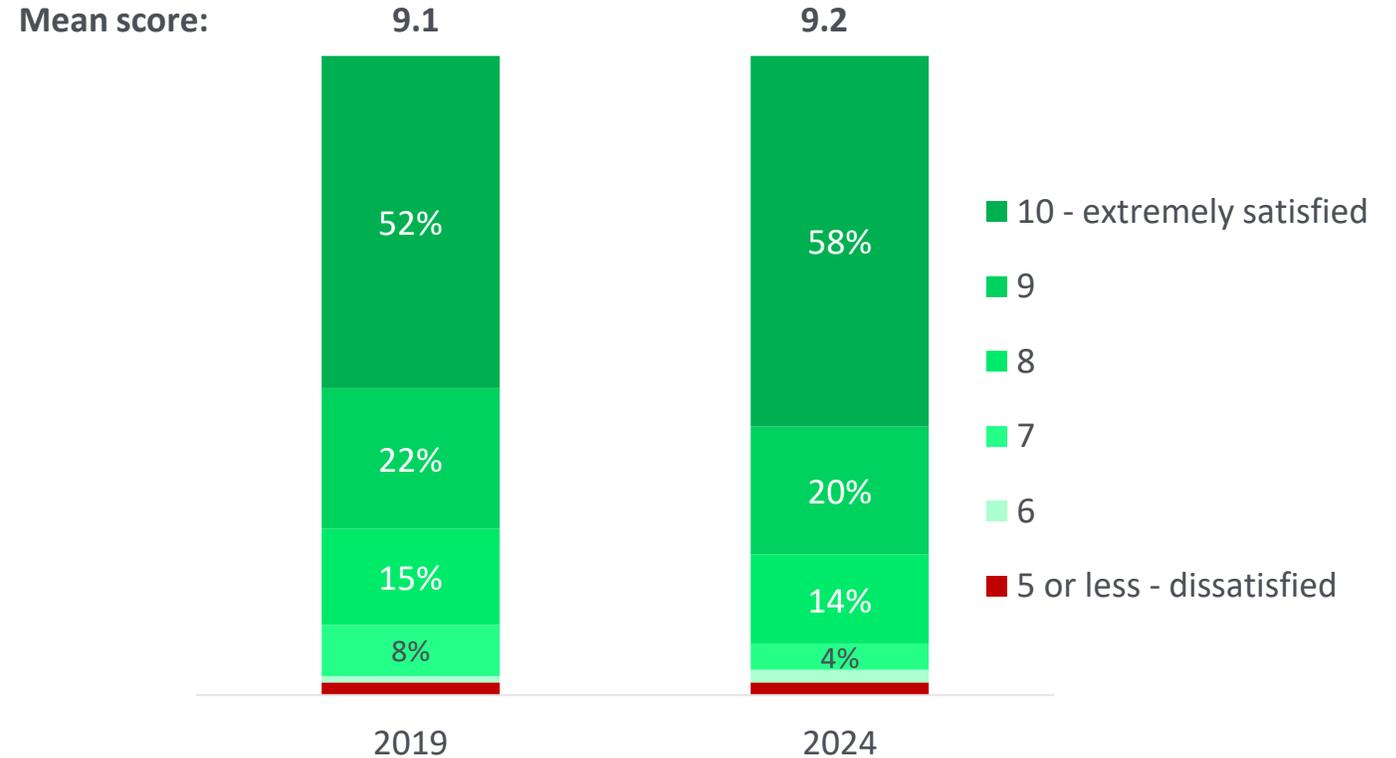
Base (All excl 'unsure'): Leisure 350, VFR 80, Business 68

Trip evaluation

Overall satisfaction

- The overall level of satisfaction with the visit to Shetland in 2024 was similar to that measured in 2019.
- In 2019, 52% of respondents gave a perfect ten out of ten score, with 74% scoring top two boxes. This compares to 58% giving a ten in 2024, and 78% scoring in the top two boxes.
- The question was asked differently in 2017; therefore, comparisons cannot be made.

Satisfaction with visit to Shetland



In 2017 a different scale was used.

Base (All excl 'unsure'): 2024: 499; 2019: 379

Q49: Overall, how satisfied were you with your visit to Shetland?

Trip evaluation

Summary



- Overall satisfaction with the experience of visiting Shetland remains very high in 2024, with almost eight in ten respondents providing a score of nine or ten out of ten. Furthermore, seven in ten Leisure/VFR visitors agreed it was one of the best holidays they had ever taken, while 84% scored nine or ten for likelihood to recommend Shetland as a holiday or short break destination.
- Reflecting the findings from previous waves, interactions with local people were a particular highlight for many visitors in 2024 – 84% of Leisure/VFR visitors agreed strongly that they were made to feel welcome, 67% agreed strongly that the local people really added to their experience, and 60% agreed strongly that they had experienced excellent customer service. Strong agreement with these statements has increased in 2024 compared to previous years. Open-ended comments also highlighted the contribution of local people ensuring visitors enjoyed their trip to Shetland.
- Most visitors also agreed that Shetland looks after its natural environment and they were encouraged to behave in an environmentally responsible way. The proportion saying they were encouraged to be environmentally responsible has increased in 2024 to its highest level.
- More detailed questions around satisfaction with accommodation, attractions, activities/experiences and food and drink were included in 2024. The majority of visitors were satisfied with these aspects of their trip, with particularly high levels noted for staff at attractions and activities.
- However, there were lower levels of satisfaction around value for money, particularly in relation to restaurants/cafes and accommodation. Although the majority of visitors were satisfied, the quality of accommodation and restaurants/cafes tended to be rated lower than attractions and activities. Open-ended responses revealed that some visitors were frustrated with the lack of options of restaurants and cafes, meaning that booking was essential.
- In terms of improvements, the key suggestions were more and better quality food and drink options for visitors, and improvements to public transport, such as better reliability and clearer information.

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Volume and value

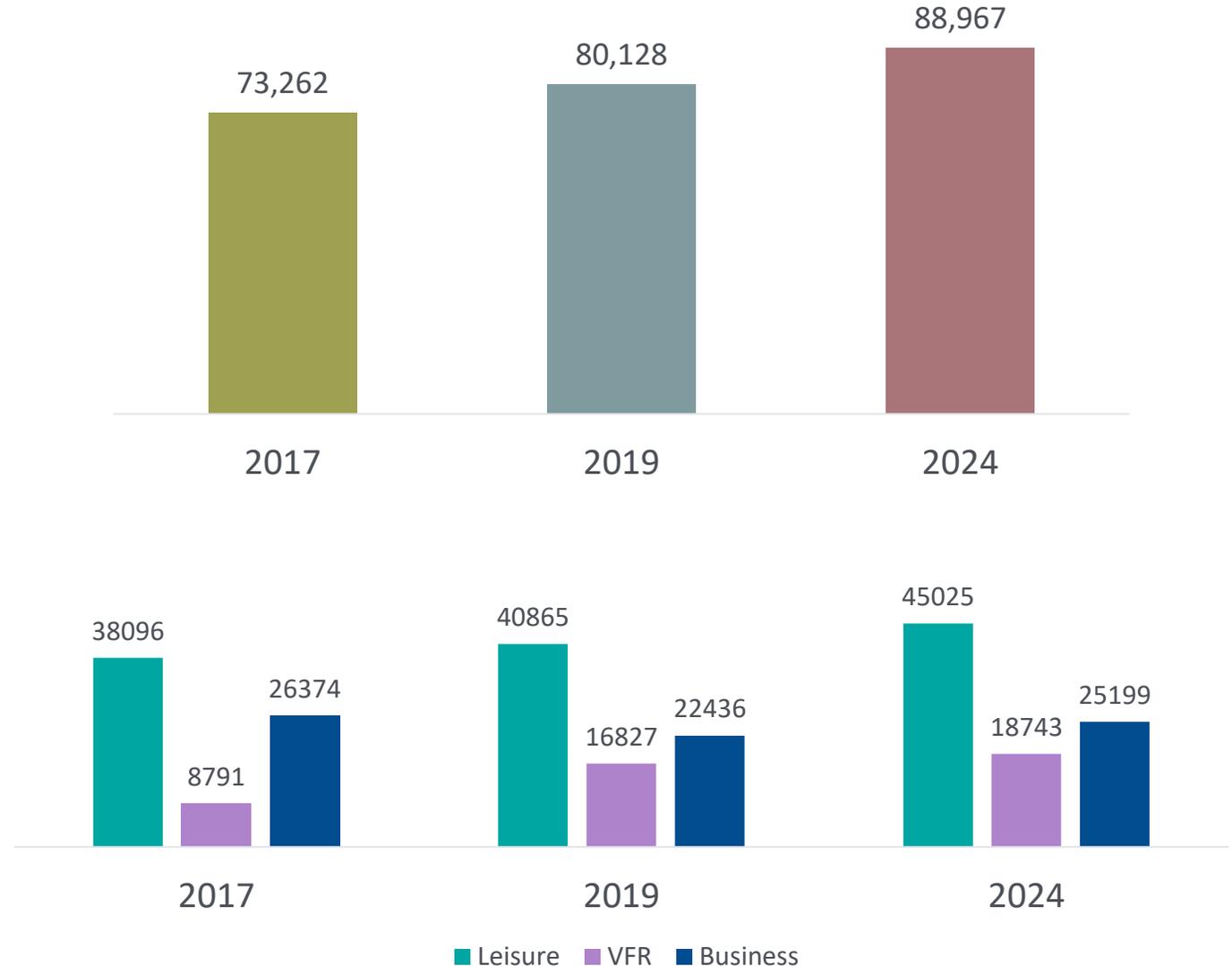
Volume and value

Visit numbers

- Total departing passenger numbers for 2024 were provided by travel operators.
- These figures were used to calculate the total number of visits* to Shetland based on:
 - **Peak months** - the proportion of visitors (versus islanders) measured by the calibration survey (63%).
 - **Off-peak months** – the estimated proportion visitors versus islanders based on 2019 data (42%).
- The estimated total number of visits to Shetland in 2024 was almost 89k. This is an increase of 11% in visitors since 2019.
- In order to estimate the breakdown by visitor type in 2024, a similar approach was used, i.e. for the peak months the percentage for each visitor type was multiplied by peak month visits, and for the off-peak months 2019 off-peak percentages were applied to 2024 estimated off-peak visits. The two figures were added to provide total year figures. Based on these data and assumptions, the total number of Leisure visits to Shetland in 2024 was 45k, an increase of around 10% since 2019.

*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 2024 – full year

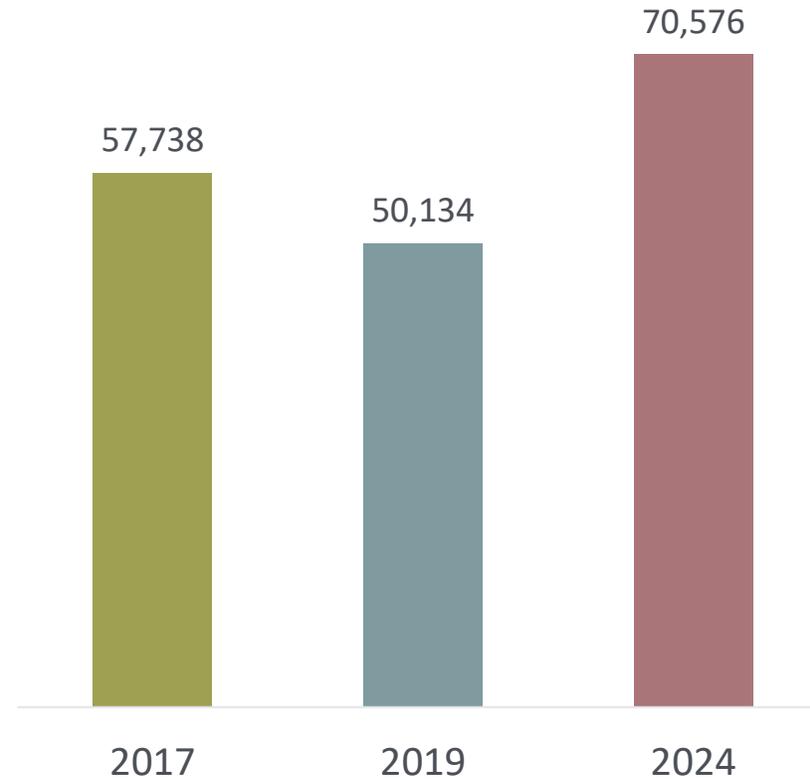


Volume and value

Visit numbers

- The passenger figures were also used to calculate the total number of visits to Shetland in the peak months of April to October. This is based on the proportion of visitors (versus islanders) measured by the calibration survey during these months – 63%.
- The total number of visits to Shetland from April to October in 2024 was 70,576. This is an increase of 41% in visitors since the same period in 2019.
- 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 as shown opposite.

Numbers of visits to Shetland Islands in 2024 – April to October



Visitors	
Leisure	39,875
VFR	13,409
Business	17,291

*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.

Volume and value

Average spend

- The data tabulated opposite shows the total average spend per person for their whole trip, as well as the overall average spend in each 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 (£241), followed by accommodation (£228).
- The overall average spend per person was £956. As expected, this has increased since 2019 when the average spend was £789. The total average spend per person 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 April to October



Total average spend per person - £956



Q32/33: How much did you/you and your immediate party/group spend on the following items in total during your stay on Shetland?

Base (All who provided spend data excluding outliers): 290

Volume and value

Average spend

- The total average spend per person on the Shetland Islands between the months of April and October was £590.
- 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.
- Leisure visitors had the highest average spend per person at £707.
- Business and VFR visitors had similar levels of average spend at £381 and £435 respectively.
- The average spend per person in 2024 is higher than in 2019 (£448), which represents a 32% increase.

Average spend on Shetland Islands – all visitors April to October



Total average spend per person on Shetland Islands - £590



Q32/33: How much did you/you and your immediate party/group spend on the following items in total during your stay on Shetland?

Base (All who provided spend data excluding outliers): 290

Volume and value

Total value

- Average spend figures have been applied to visit volume in order to calculate the total value of visits to Shetland between April and October in 2024. The total visitor spend in these months was measured at £40.6m.
- In order to estimate the value of visitor spend in the off-peak months, the ratio of off-peak/peak average spend per person measured in 2019, was applied to 2024 peak average spend per person. This gave an estimation of 2024 off-peak spend per person, which was applied to off-peak visit numbers in 2024*.
- Adding these two figures together gives an estimate of total annual visitor spend for 2024 of approximately £50.3 million. This represents an increase of 40% on value since 2019 (£35.8m).
- The largest proportion of value in the peak months came from Leisure visits - £28.2m.

Total spend by visitors on Shetland Islands in 2024



Peak months - April to October	Number of visitors	Average spend	Total Spend
Leisure	39,875	£706.62	£28,176,809
VFR	13,409	£434.54	£5,826,943
Business	17,291	£381.22	£6,591,727
Total (peak months)	70,576		£40,595,480
Total (off-peak months)			£9,714,170
Total 2024 spend			£50,309,650

*Off-peak visits were calculated based on passenger data provided by transport providers and applying the 2019 figures for percentage visitors in off-peak months.



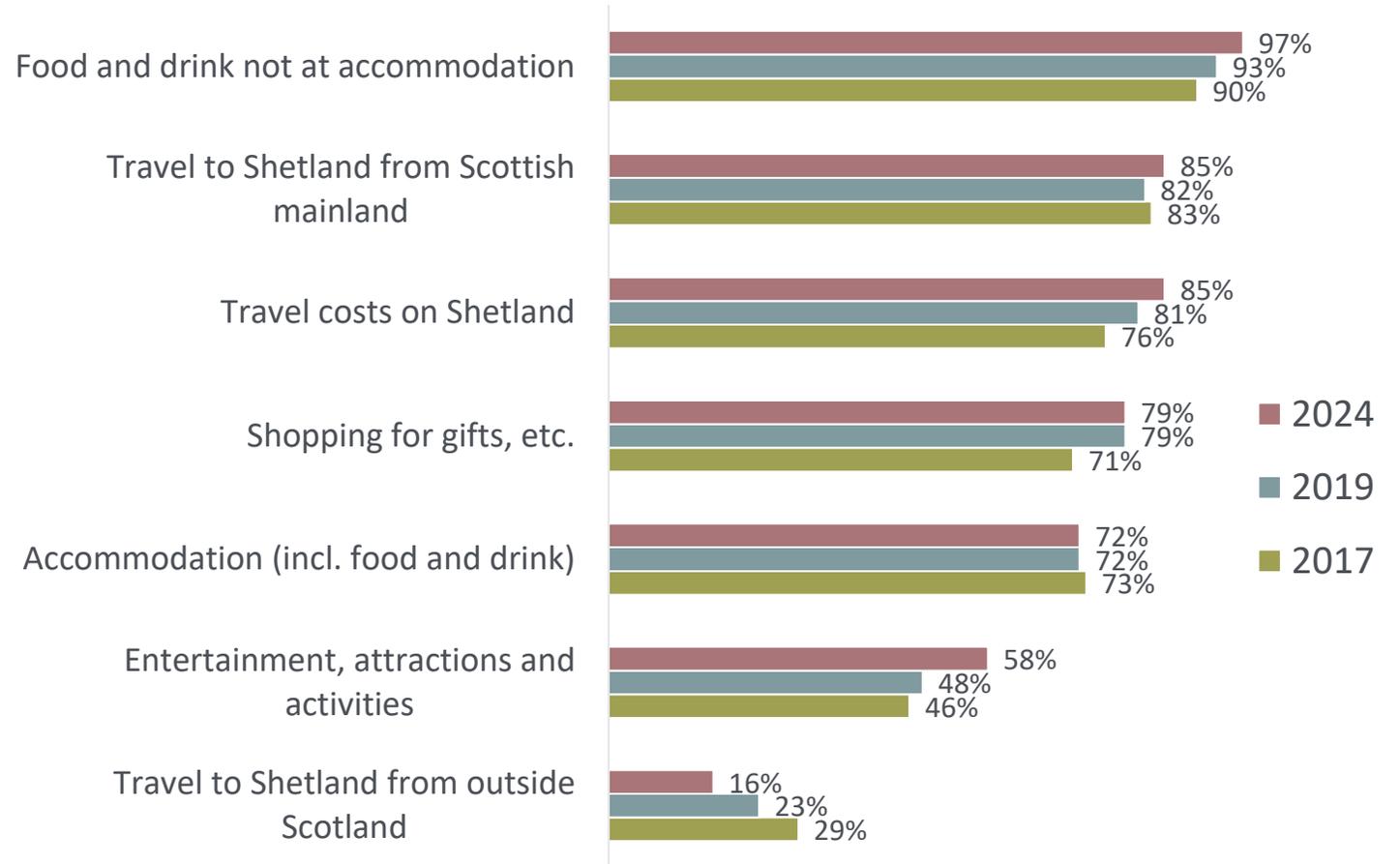
Volume and value

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. The proportions spending in these categories were consistent with previous waves of the survey.
- Leisure visitors were more likely to incur costs on various types of expenditure than VFR or Business visitors. For example, 83% spent on accommodation, compared to 44% of VFR visitors and 68% of Business visitors. Similarly, Leisure visitors were also more likely to mention spend on entertainment, attractions and activities (73%) than Business (22%) or VFR (48%) visitors.
- As we might expect, Leisure (90%) and VFR (78%) visitors were more likely to mention spend on shopping than Business visitors (45%).



Proportions providing spend data in each category – all visitors



Note: 2024 data is peak months and 2017/2019 data is full year

Q32/Q33: How much did you/you and your immediate party/group spend on the following items in total during your stay on Shetland?

Base (All who provided spend in each category):
2017: 576; 2019: 276; 2024: 290 96

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 £276 per person. Travel from the Scottish mainland cost around £284 per person on average.
- The average cost of accommodation for people staying in paid for accommodation was £316, whilst the additional costs of food and drink on the trip averaged £124 for those who incurred these costs.
- Of those who purchased gifts and souvenirs, the average amount spent on the trip was £76 per person.

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



Q32/Q33: How much did you/you and your immediate party/group spend on the following items in total during your stay on Shetland?

Base (All who provided spend in each category): 46 - 273



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Final summary and conclusions

Summary

Visitor profile



- Following a period of sustained growth in tourism, the Shetland Islands, like many other destinations around the world, was severely impacted by both the covid pandemic and the cost-of-living crisis. Since then, there has been a slow recovery, however, it is not clear how the needs and expectations of visitors have evolved over this period, and whether the profile of people choosing Shetland for their holiday or short break have changed.
- The Shetland Visitor Survey was established in 2017 to ensure that Shetland Islands Council and its partners have relevant, accurate and up-to-date data to guide strategic planning. The last wave of the survey was conducted pre-pandemic in 2019, therefore, it was vital to update the insights previously gathered. A new wave of research was undertaken in 2024, with fieldwork being conducted from April to October.
- Just over half of visitors to Shetland in 2024 were on a holiday/leisure trip, while a quarter were business/work visitors and a fifth had travelled to the islands to visit friends or relatives.
- The islands attracted Leisure visitors from all over the world, although the largest proportion came from the UK (55%), with one fifth from Scotland (21%) and a third from England (32%). More than a fifth (22%) of Leisure visitors were from Europe (mostly France, Germany and the Netherlands), with 14% from North America and 7% from Australia. The profile of Leisure visitors was very similar to 2019, but with fewer Scotland visitors and more overseas visitors compared to 2017.
- The age profile of visitors tended to be older, with more than half overall aged 55+, rising to two thirds of Leisure visitors.
- Two fifths (42%) of Leisure visitors were travelling as a couple with their partner or spouse, while one fifth was travelling solo. Only a small minority of 4% had children under 16 years old in their party.
- Almost three quarters of Leisure visitors (73%) were first time visitors to Shetland.
- The profile of Leisure visitors was very similar to the profile measured in 2019.

Summary

Visitor journey



- The stunning beaches and landscapes, the abundant wildlife and the rich history and culture were the key reasons why Leisure visitors chose Shetland for a holiday or short break in 2024. Inspiration came from a number of sources, with personal recommendations, digital sources, such as the Shetland.org and visitscotland.co.uk websites, and the 'Shetland' TV series and books, being particularly influential.
- Planning a trip to Shetland tends to start at least 3 months before travel. It was noted in 2019 that planning and booking was initiated longer before travel than in 2017, and also that there had been a decline in the proportion of visitors reporting that they did not book their accommodation in advance. The findings in 2024 indicate that this trend continues, albeit differences compared to 2019 are small. As such, visitors are aware that accommodation provision is limited compared to demand and understand the necessity of booking well in advance.
- Around a fifth of Leisure visitors booked at least some of their travel and accommodation in a package. The majority, however, booked their accommodation either directly with providers (45%), via an online travel agent (25%) or via an online marketplace (22%). More than four in five booked their transport directly with the provider. These findings indicate that Leisure visitors to Shetland like to book independently, giving them the freedom to choose accommodation and travel to suit their needs and budget.
- Around half of Leisure and VFR visitors reported that they booked activities or experiences on Shetland, again, most often directly with the provider. For most visitors, these were booked separately to any accommodation or travel bookings.

Summary

Trip profile



- Similar to previous waves of research, visitors to Shetland in 2024 typically stayed for a period of up to one week. Lerwick, South Mainland, Scalloway and Central Mainland were the most popular areas to visit.
- The main activities undertaken by Leisure visitors reflected their reasons for visiting Shetland – the majority mentioned walking, enjoying the scenery (especially the beaches/coasts), watching Shetland’s wildlife, and shopping for arts and crafts. The top attractions visited were Sumburgh Head, Shetland Museum and Archives, St Ninian’s Isle and Jarlshof.
- For Leisure visitors, serviced accommodation options were most prevalent (mentioned by 53%), particularly hotels (35%) and B&Bs (27%), while a third stayed in non-serviced accommodation and one in ten opted for camping or caravanning.
- When respondents were asked to rate various aspects of being able to find suitable accommodation on Shetland, such as the quality of options in places they wanted to visit and the availability of options to meet their needs, most were satisfied. However, it is important to note that a significant minority was dissatisfied, suggesting that accommodation options do not currently meet the needs of all visitors.

Summary

Evaluation of trip experience



- Shetland continues to attract high satisfaction ratings from its visitors; similar to 2017 and 2019, the vast majority provided a very positive evaluation of their experience on the islands.
- As we have seen in previous waves of the survey, interactions with local people was clearly valued, with many visitors agreeing that they were made to feel welcome, that the local people really added to their holiday experience, and that they experienced excellent customer service.
- There was also a strong appreciation of the efforts being made to protect the environment on Shetland – most visitors agreed that the natural environment is well looked after and that they were encouraged to behave in an environmentally responsible way, and more people agreed strongly with this sentiment than in previous years.
- When asked to rate their experiences of accommodation, food and drink, attractions and activities on the islands, the majority provided very positive scores, with the highest ratings for the knowledge and passion of staff at attractions and activities.
- However, there were lower levels of satisfaction around value for money, particularly in relation to restaurants/cafes and accommodation. Although the majority of visitors were satisfied, the quality of accommodation and restaurants/cafes tended to be rated lower than attractions and activities. This was particularly true of visitors from Europe.
- When asked to comment on any negative aspects of their trip, open-ended responses revealed that some visitors were frustrated with the lack of eating and drinking options, meaning that booking was essential. Consequently, when asked to comment on possible improvements, the main suggestions were more and better quality food and drink options, as well as improvements to public transport, such as better reliability and clearer information. It should be noted that a lack of options for restaurants and cafes and limited opening hours is a common issue in rural area across Scotland, and is at least partly driven by the difficulties business owners are experiencing in finding suitable staff.
- Nevertheless, when summing up the quality of their visit to Shetland, the majority of respondents were highly satisfied, with an overall average score of 9.2 out of ten. Similarly high scores were also achieved for likelihood to recommend Shetland (9.4) and likelihood to return in the next five years (8.0). The high propensity to recommend Shetland is particularly significant given the importance of personal recommendations in inspiring people to visit the islands.

Conclusions

- The research conducted in 2024 confirms that the key attributes that draw visitors to the Shetland Islands have not changed fundamentally since the pandemic. Indeed, these attributes are becoming ever more valued in today's world where visitors are seeking authentic experiences and to connect with nature to slow down, destress and unwind.
- The findings have revealed that the high-quality experience people reported in previous years has not only been maintained, but has improved in many areas, in particular, interactions with local people, the quality of service from staff and being encouraged to behave in an environmentally responsible way.
- A number of new trends in tourism have started to emerge in recent years, including passion tourism, experiential tourism, and wellness tourism. Given Shetland's natural and cultural assets, it is ideally placed to capitalise on these trends.
 - **Local communities** - People are looking for meaningful connections with real people and communities – our data shows that visitors value this and Shetland's people are interacting with visitors in a way that adds to their holiday experience. Connected to this is a desire for deeper cultural connections. Again, Shetland is uniquely positioned to cater to this trend with its Viking heritage and bucket list events, such as Up Helly Aa.
 - **Wellbeing** - Visitors are increasingly looking for destinations that improve their wellbeing, where they can enjoy the restorative benefits of being in nature. Many parts of Shetland offer true wilderness; there are opportunities to see wildlife that you can't find in any other part of the UK; and the landscape remains unspoilt by excessive numbers of visitors. Few destinations offer a more genuine 'getting away from it all' experience.
 - **Activities and experiences** – Visitors are often looking for exciting experiences that will make memories to last a lifetime. Shetland offers both cultural and adventure seeking visitors these kinds of experiences. Data from the survey shows that visitors rate current activities and experiences very highly.
 - **Set-jetting** – many visitors want to see the places where their favourite movies and TV shows are filmed. The Shetland TV series was a key source of inspiration for visitors to Shetland, and there is therefore opportunity to capitalise on this trend.
- The key aspects of the visitor experience that could be improved are the quality and availability of accommodation and food and drink options. Some visitors also felt that prices were higher than expected. It would also be beneficial if public transport information could be clearer, and if this was more joined up, e.g. buses and ferries in alignment.

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Technical appendix

Technical appendix

Quantitative: method and sampling

The data was collected by face-to-face interviews and an online survey.

The target group for this research study was a representative sample of visitors to the Shetland Islands. The variables used to define the sample as representative of the target group were passenger numbers via sampling points for the calibration survey and visitor type and origin for the online survey.

The sampling frame used for the online survey was email addresses collected from visitors interviewed for the calibration survey.

The sample type for the calibration survey was probability. The sampling type for the online survey was non-probability.

Respondents for the calibration survey were selected using probability random sampling, where interviewers selected every nth person passing their pre-selected sampling point (in airports and ferry terminals).

For the online survey, all respondents who volunteered to take part were sent an invitation.

Both the calibration and online samples were highly appropriate for this study. Almost all visitors to the Shetland Islands must pass through the airports and ferry terminals where interviewing was conducted. 70% of calibration respondents agreed to take part in further research and 53% of these responded to the online survey, meaning that we have a robust online sample drawn from the calibration responses.

The target sample size for the calibration survey was 2,360 interviews, and 1,150 visitors, and the final achieved sample size was 2,245 interviews, with 1,356 visitors. The target sample size for the online survey was 431 and the achieved sample size was 501. The reason for the difference was a better than expected response rate.

Fieldwork was undertaken between April to October for the calibration interviews, and May to November for the online survey.

All persons on the online sampling frame were invited to participate in the online study. 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 participation rate for the online survey was 53%. The participation rate was calculated by dividing the number of participants responding to the online survey divided by the total number of invitation emails sent (minus bounce backs). This response rate is high for a survey of this kind.

Given the probability method of sampling for the calibration and the high levels of participation in the online survey, we are confident the study has provided robust and representative samples for analysis. Comparing the data to previous waves of research confirms very stable samples over time.

An incentive of a monthly prize draw to win £100 encouraged a positive response to the online survey.

Technical appendix

Quantitative: validation and data processing

In total, 4 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.

The final data set was weighted to reflect:

- Calibration – passengers numbers departing via Sumburgh Airport and Holmsgarth Ferry Terminal. The sample base before weighting is 2,245, whilst the weighted sample base is 2,245.
- Online – the visitor type and origin profile measured in the calibration survey. The sample base before weighting is 501, whilst the weighted sample base is 501.

The margins of error for each sample are detailed in the Analysis section of this report.

The following methods of statistical analysis were used: Z tests and t-tests

Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.

For **online questionnaires** these checks include:

- Responses are checked for duplicates where unidentified responses have been permitted. Cookies are also used and open-ended responses are checked to avoid duplicate responses.
- All responses are checked for completeness and sense.
- The raw data is monitored throughout fieldwork to check for flatlining responses, quality of open-ended responses and speed of completion. Rules will be agreed with the DP team at the start to determine when to exclude data based on these checks. Where the sample source was an online panel, the IDs of all respondents removed from analysis are referred back to the panel provider to assist with on-going quality improvements.

For **CAPI Questionnaires** these checks include:

- Field checks will be agreed with the fieldwork manager prior to fieldwork starting. These may include speed of interview, quality of open-ended responses, probing at scale questions, adherence to quotas and any other project specific checks required. The raw data submitted by each and every interviewer is checked against these criteria throughout fieldwork. Any concerns are personally communicated back to interviewers, and their work further monitored.
- The raw data is checked to ensure that interviewer and location are identifiable. Any errors or omissions detected at this stage referred back to the field department, who re-contact interviewers to check.
- CAPI scripts include an option to agree to being re-contacted, either by email to complete an online survey or by telephone for an interview, for quality assurance purposes. Responses to the back-checking are matched to the CAPI interview responses which may be corrected if errors are identified. We back-check at least 10% of each interviewer's work.

Technical appendix

Quantitative: quality procedures

Other checks include:

- Every project has a live pilot stage, covering the first few days/shifts of fieldwork. The raw data and data holecount are checked after the pilot to ensure questionnaire routing is working correctly and there are no unexpected responses or patterns in the data. For CAPI projects, interviewers will also be asked to provide feedback on the questionnaire, sample, quotas and sample locations as required.
- A computer edit is carried out prior to analysis, involving both range (checking for outliers) and inter-variable checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data where possible.
- Where an 'other – specify' codes is used, open-ended responses are checked against the parent question for possible up-coding.
- Responses to open-ended questions will be spell and sense checked. Where required these responses may be grouped using a coding frame, which can be used in analysis. The code frame will be developed by the executive or operations team and will be based on the analysis of minimum 50 responses.

A SNAP programme was set up with the aim of providing the client with useable and comprehensive data. Cross-breaks are discussed with the client in order to ensure that all information needs are met.

Where a self-completion survey is returned anonymously there is not any opportunity for validation. However, all questionnaires returned undergo rigorous editing and quality checks and any thought to be invalid are removed from further processing.

All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.