

progressive

Shetland Islands Visitor Survey 2019

Shetland Islands Council and
VisitScotland

April 2020



Shetland
Islands Council

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Project background



- Tourism is one of the most important economic drivers for the Shetland Islands. The islands receive more than 75,000 visits per year from leisure and business visitors.
- Shetland Islands Council has developed a strategy for economic development 2018-2022 to ensure that the islands benefit economically from tourism, but in a way that protects its natural, historical and cultural assets, whilst ensuring environmental sustainability, continuous development of high quality tourism products and extending the season.
- Strategies to achieve these objectives must be based on sound intelligence about the volume, value and nature of tourism to the islands, as well as a good understanding of how emerging consumer trends are influencing decisions and behaviours, and impacting on visitors' expectations, perceptions and experiences.
- Shetland Islands Council, in partnership with VisitScotland, commissioned research in 2017 to provide robust estimates of visitor volume and value, as well as detailed insight into the experiences, motivations, behaviours and perceptions of visitors to the islands. This research provided a baseline against which future waves could be compared in order to identify trends and monitor the impact of tourism initiatives on the islands. This report details the findings from the second wave of the research completed in 2019.



Project objectives



* VFR – Visiting friends and relatives

- The research data was gathered using a 2 stage approach:
 - Stage 1 – Calibration interviews conducted face-to-face with visitors at key exit points from the islands – ferry terminal and airport
 - Stage 2 – Follow-up online survey to gather more detailed feedback
- Stage 1 - Calibration Interviews
 - The calibration interviews were conducted using CAPI technology (Computer Aided Personal Interviewing)
 - Each interview lasted approximately 3 minutes
 - Data gathered included profiling data and type of trip – leisure, visiting friends and relatives (VFR), business
 - Sampling was spread across 2019 – 22nd January to 13th December.
 - The sampling points were:
 - Sumburgh Airport
 - Holmsgarth Ferry Terminal
 - Random sampling approach 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, 3,363 calibration interviews were completed – 1,572 visitors; 1,725 island residents; 66 others

- Stage 2 - Online Survey
 - Respondents were asked if they would like to take part in an online survey at the end of the calibration interview
 - Email addresses were gathered and the survey was sent within a two-week period of the calibration interview, allowing them time to arrive home
 - In total, 924 visitors to Shetland agreed to take part in the online survey. 29 email addresses bounced back leaving a potential sample size of 895.
 - The online survey remained open for 3 weeks for each visitor
 - A reminder was sent halfway through the 3-week period
 - The final sample response was 424 completed online surveys (47% response rate)

Analysis

Statistical validity



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

Sample type	Sample size	Margin of error
Total Calibration	3,363	+/- 0.33% to +/- 1.67%
Total Sample of Visitors - Calibration	1,572	+/- 0.49% to +/- 2.45%
Total Sample - Online	424	+/- 0.94% to +/- 4.75%
Leisure Visitors – Online	259	+/- 1.21% to +/- 6.07%
VFR Visitors – Online	89	+/- 2.06% to +/- 10.36%
Business Visitors - Online	68	+/- 2.36% to +/- 11.87%

- All bases shown are the unweighted bases. Bases vary by question depending on routing. Where base sizes are low a caution sign is shown. 
- Where figures do not add to 100% this is due to multi-coded responses or rounding.
- In commentary where net figures are reported (i.e. when figures on charts are combined, for example, total booking more than 6 months before travel) 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+
- 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	259
VFR	89
Business	68

Origin (Leisure)	Base (unweighted)
Scotland	51
Rest of UK	104
All overseas	104
Europe	47
North America	31
Other overseas	26

Demographics (Leisure)	Base (unweighted)
Male	121
Female	138
16 – 44	46
45 – 54	49
55 – 64	81
65+	81

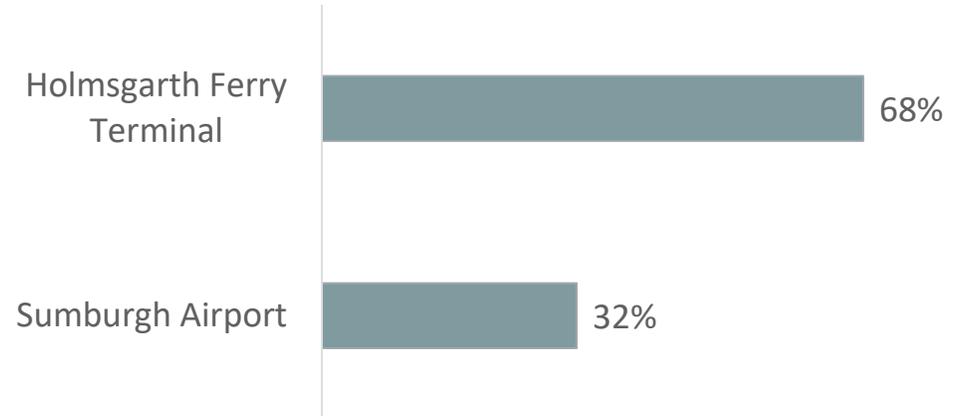
Sample

- The sampling plan was designed to provide a representative spread of interviews across exit points and months of the year.
- 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. 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 2019 was supplied by operators early in 2020 and this was used to weight the data as noted over.

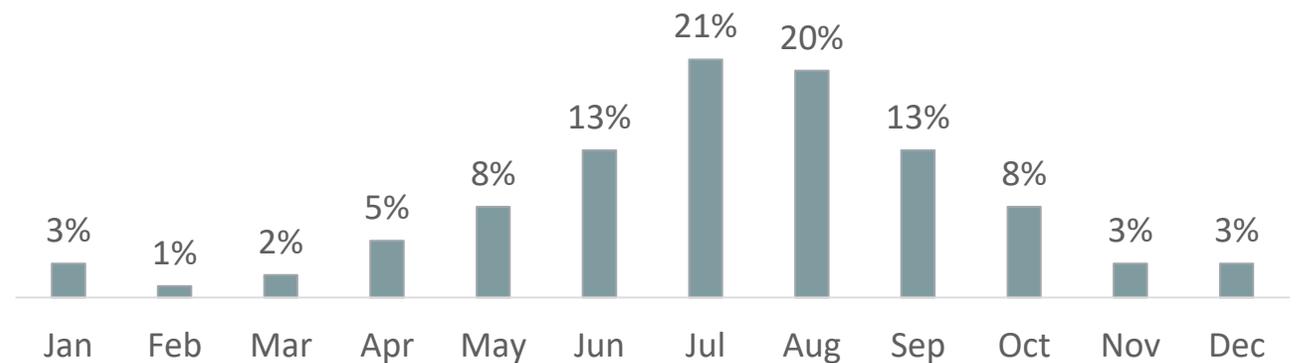
*The target proportion of interviews at Sumburgh Airport was not achieved due to difficulties intercepting passengers before they passed through security. This was an issue in 2019 and not in 2017 because the airport café was moved airside in 2019, whereas it had been located in the publicly accessible airport concourse in 2017.



Sampling point



Month



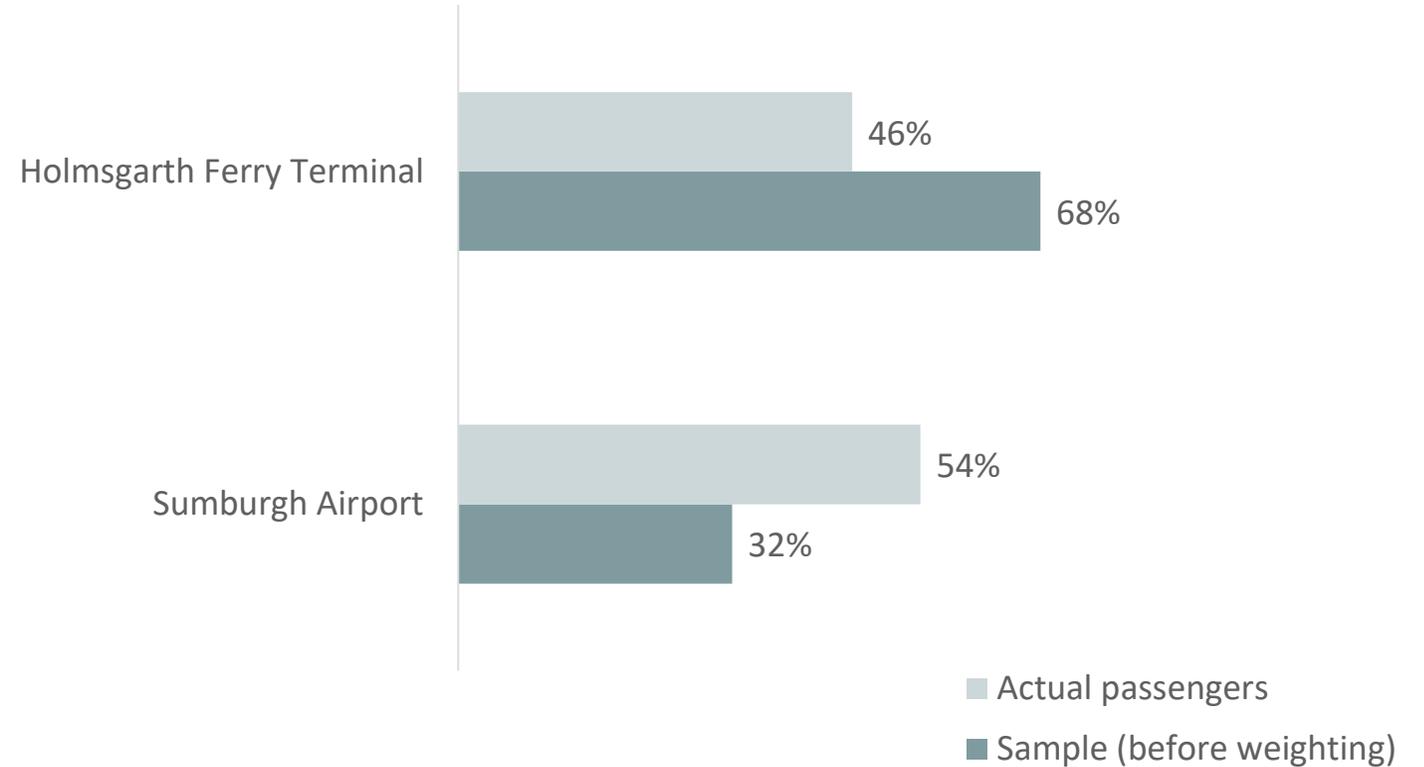
Base (All): 3,363

Data weighting

Calibration survey

- The calibration data was weighted by sampling point to reflect the actual distribution of passengers in 2019.
- Visitor numbers were provided by Northlink (Holmsgarth Ferry Terminal) and VisitScotland/HIAL (Sumburgh Airport).

Sampling point



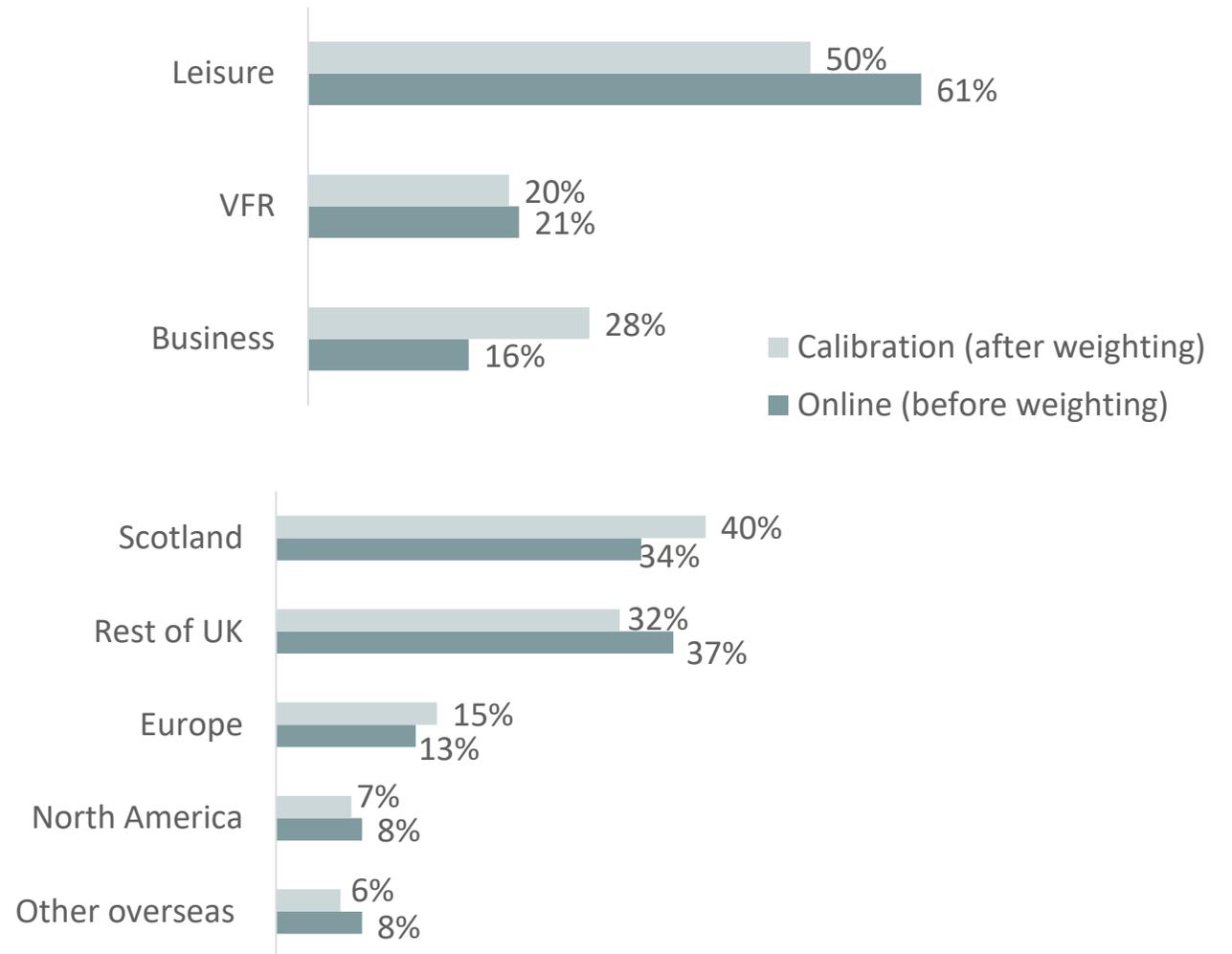
Base (All): 3,363

Data weighting

Online survey

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

Visitor type and origin



Base (All visitors): Calibration 1,572, Online 424



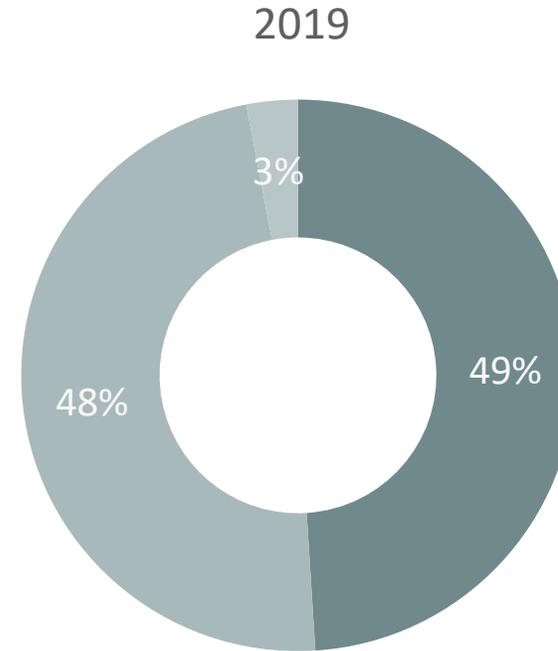
Visitor profile

Visitor profile

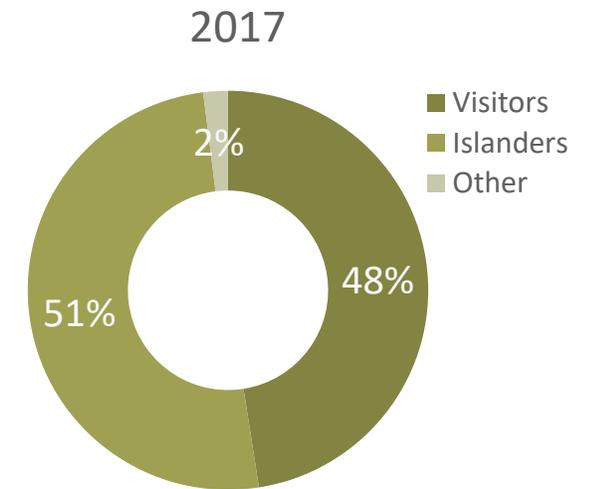
Proportion visitors

- Just less than half of all people interviewed for the calibration survey were visitors to Shetland, while 48% were islanders and 3% were people in transit between islands; haulage drivers only visiting for the day; or people on a cruise or yacht trip.
- These proportions compare very closely to the 2017 data.

Islanders vs visitors



- Visitors
- Islanders
- Other



- Visitors
- Islanders
- Other

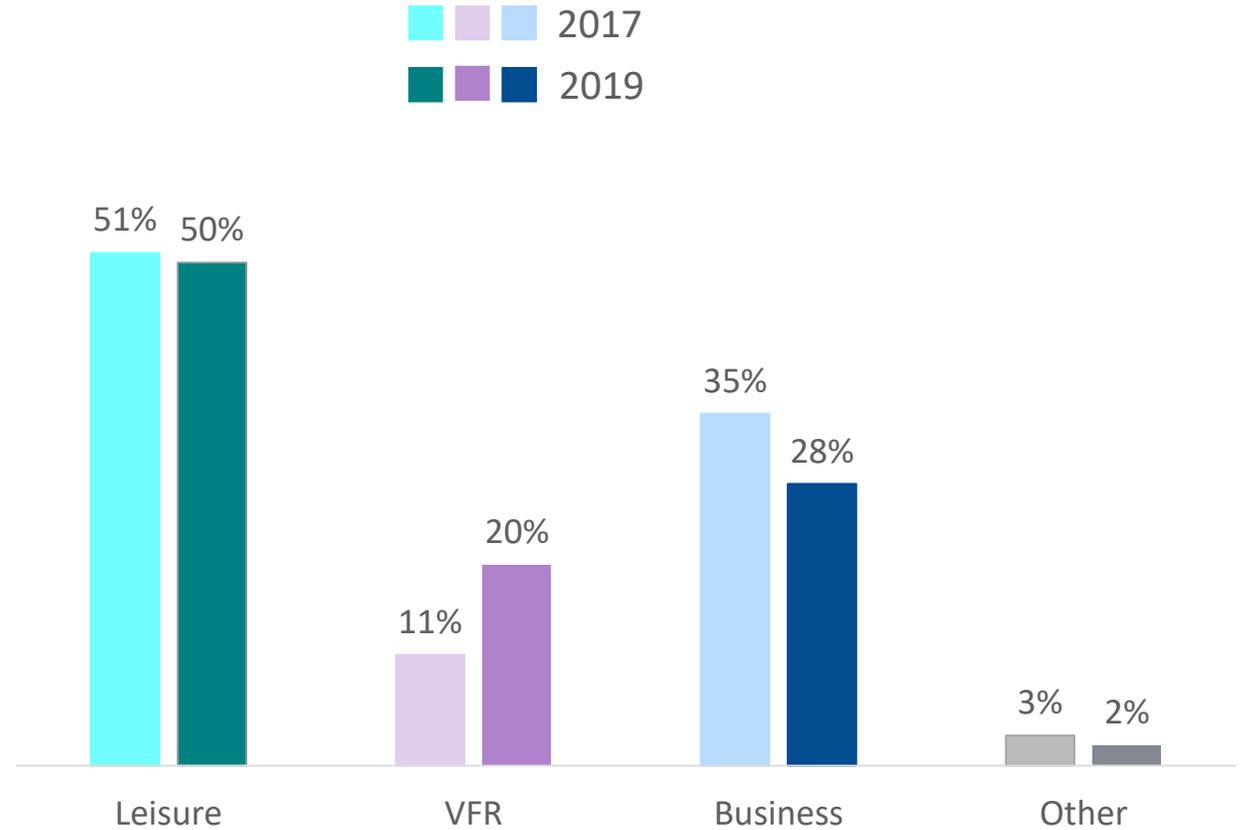
Base (All calibration): 2019: 3,363; 2017: 5,088

Visitor profile

Trip purpose

- Half of visitors to Shetland in 2019 were leisure visitors, while one fifth were visiting friends or relatives (VFR) and just over one quarter were visiting for business purposes.
- The proportion of Leisure visitors is very similar to 2017; however, there has been an increase in the overall proportion of VFR visitors and a decrease in the proportion of Business visitors in this time.

Trip Purpose

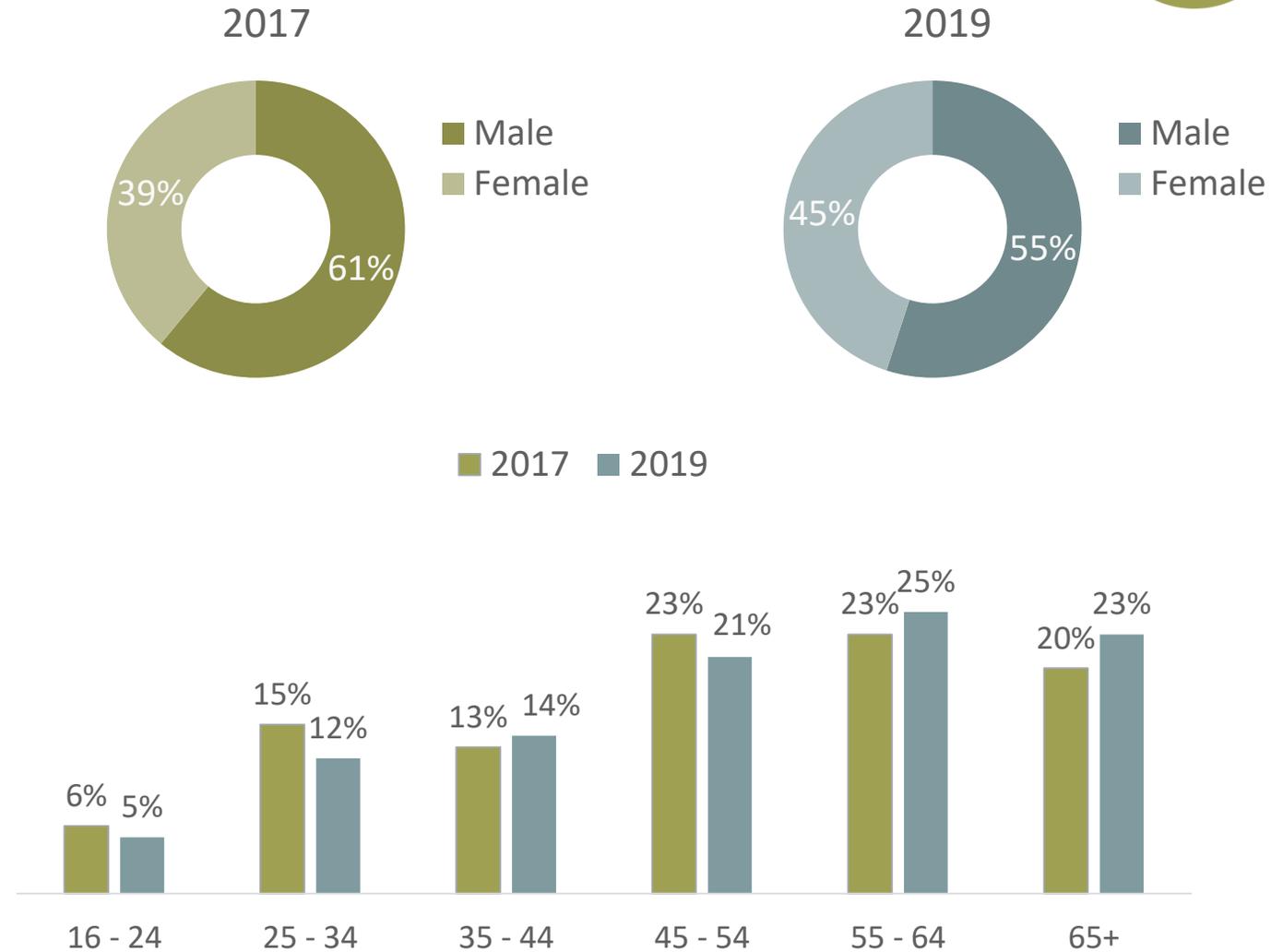


Visitor profile

Demographics

- The total sample of visitors to Shetland included more males (55%) than females (45%), however, the proportion of female respondents has increased since 2017 (39%).
- The majority of respondents were aged over 44 years old (69%), with 25% aged between 25 and 44 and only 5% 16 to 24.
- The age profile of respondents was broadly similar to 2017, however, a higher proportion were aged over 55 years old in 2019 (48%) compared to 2017 (43%) and fewer were aged under 34 years old (21% in 2017 and 17% in 2019).

Age and gender



Base (All calibration visitors) 2019: 1,572, 2017: 2,434

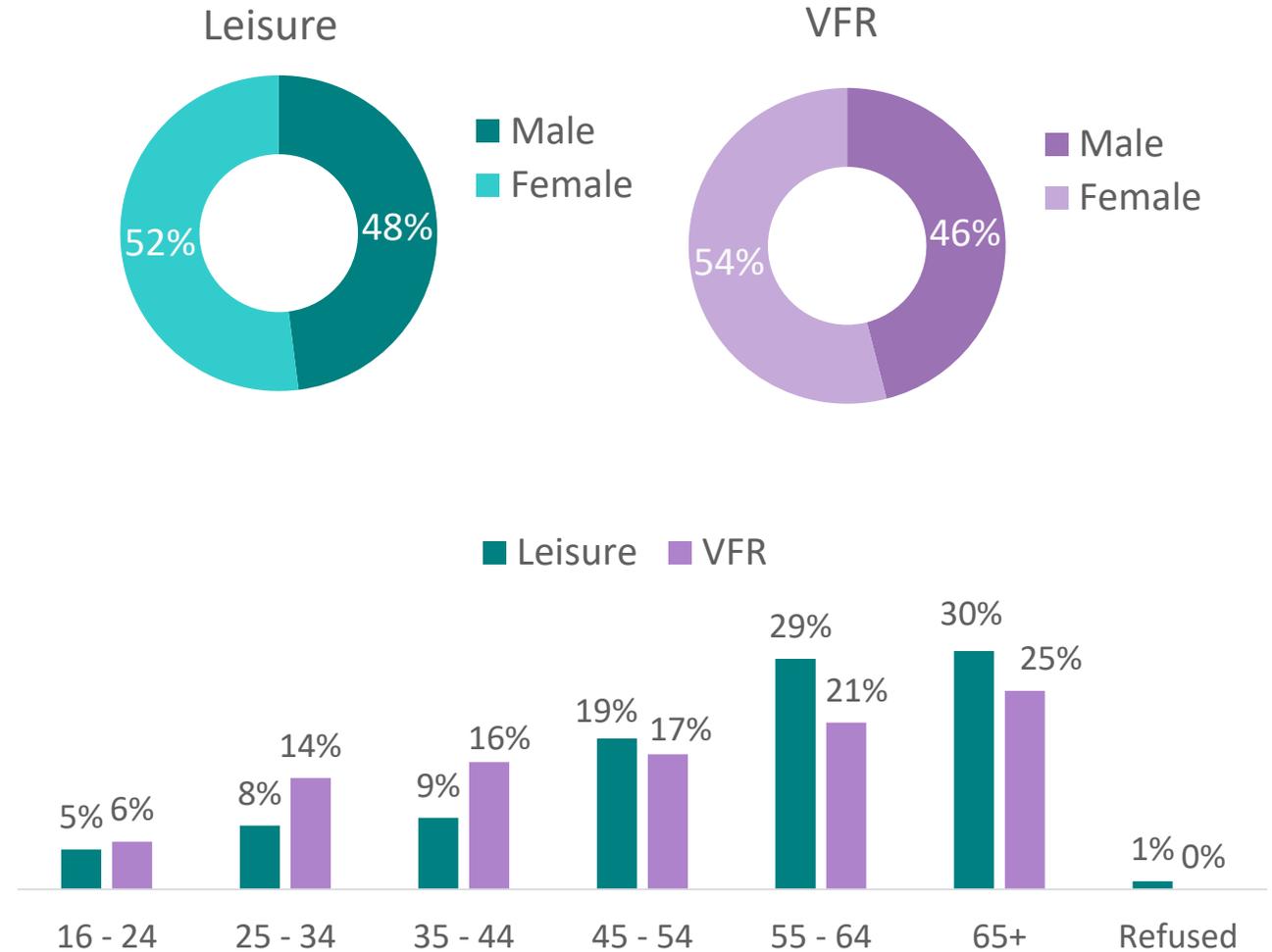
Visitor profile

Demographics

- The sample of Leisure visitors was fairly evenly split between males (48%) and females (52%). For VFR visitors, the sample profile was skewed slightly more towards females (54%) than males (46%).
- The age profile of VFR visitors was also younger than general Leisure visitors; 36% of VFR visitors were less than 45 years old, compared to 22% of Leisure visitors.
- These profiles are very closely aligned to the demographic profiles of the Leisure and VFR samples in 2017. 2019 did, however, see an increase in male VFR visitors in the sample (42% in 2017).



Age and gender – Leisure and VFR



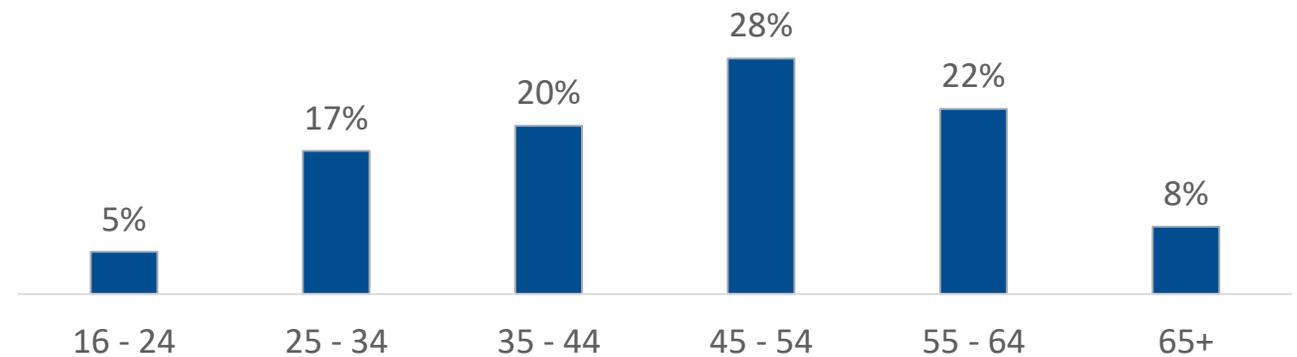
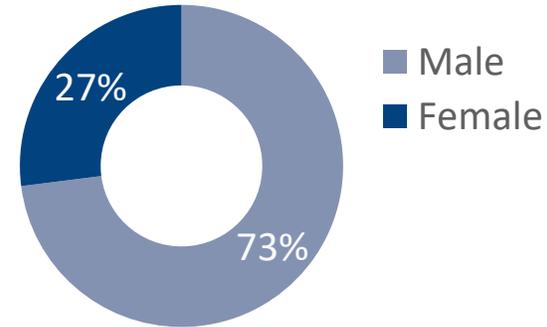
Base (All Leisure / VFR calibration visitors): Leisure 851, VFR 308

Visitor profile

Demographics

- The Business visitor sample was predominantly male (73%). The proportion of female business visitors has increased in 2019 (27%) compared to 2017 (15%).
- There was a wide spread of age groups for Business visitors, with 58% aged 45 years or older and 42% under 45. The age profile of Business visitors in 2019 was almost identical to 2017.

Age and gender - Business



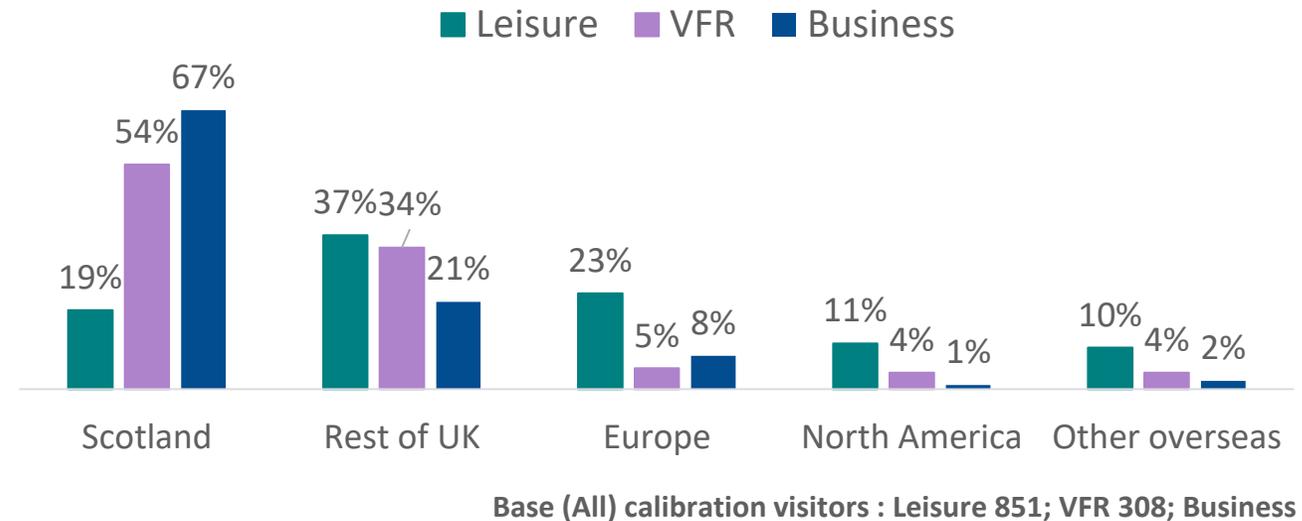
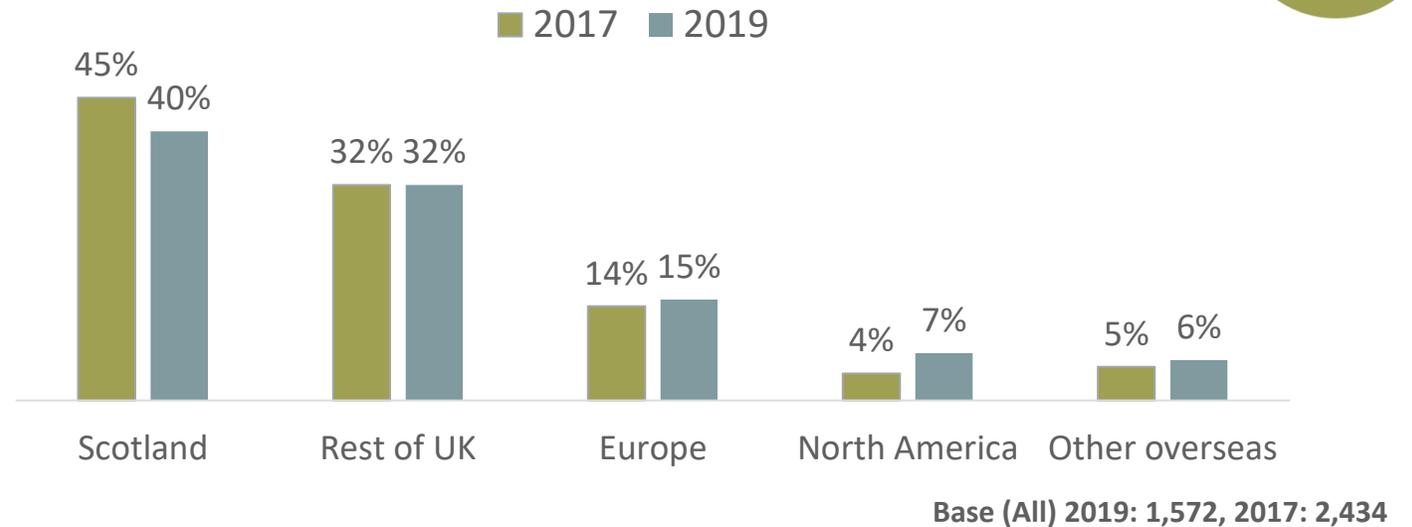
Base (All Business calibration): 382

Visitor profile

Origin

- The majority of all visitors to Shetland in 2019 were from the UK (72%), with 40% from Scotland and 32% from the rest of the UK.
- Of the 28% overseas visitors, the largest proportion was from Europe (15%), with a further 7% from North America, 5% from Australia/New Zealand and 2% from other countries.
- The origin profile of visitors in 2019 closely matched the profile in 2017, but with a lower proportion from Scotland and a higher proportion from North America.
- As we would expect, amongst Leisure visitors the proportion of overseas visitors was higher (44%) and the proportion of visitors from Scotland was lower (19%) than for VFR or Business visitors. Both VFR and Business visitors were predominantly from Scotland.

Origin

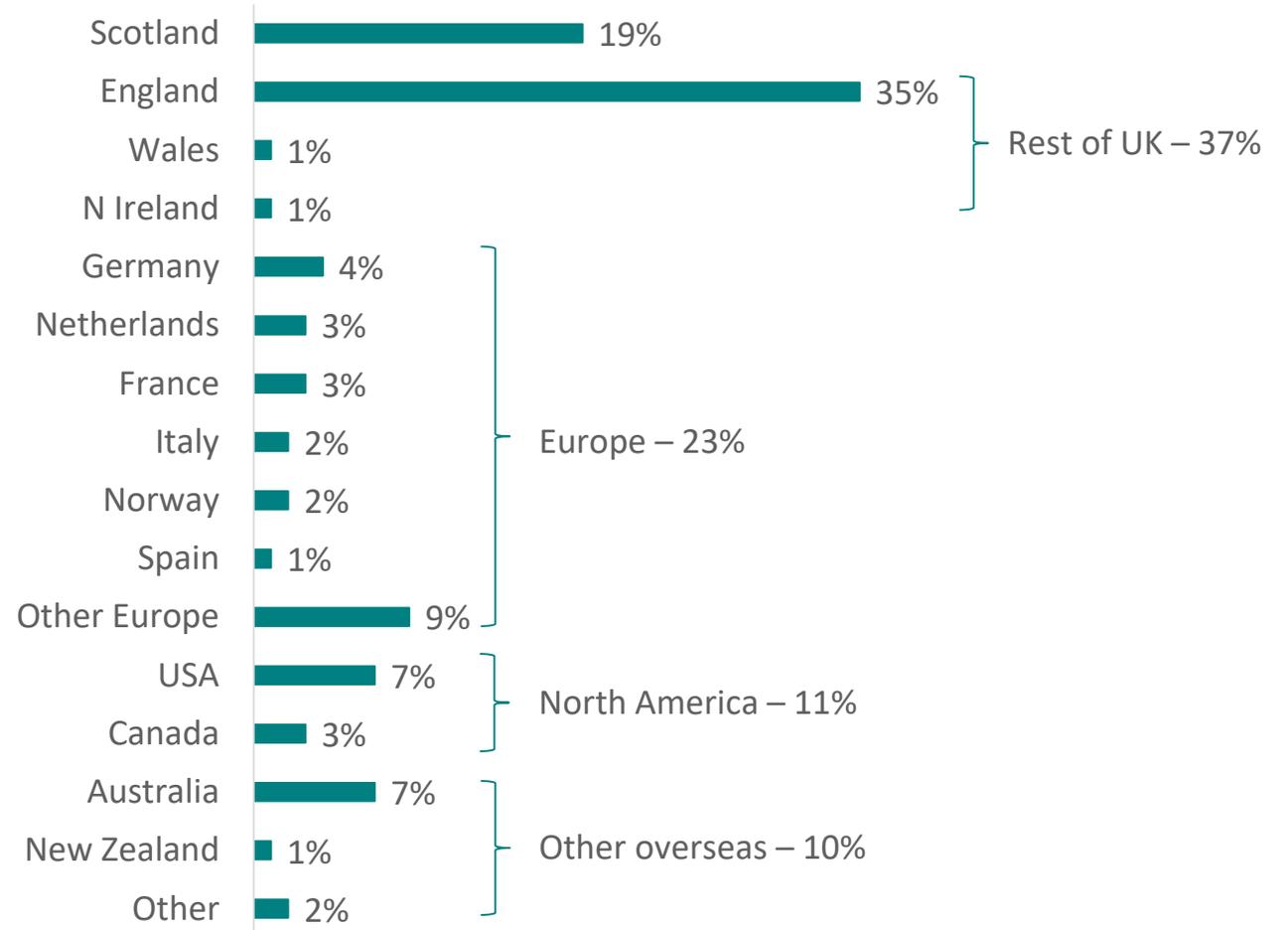


Visitor profile

Origin

- Outside of the UK, the largest market for Leisure visitors to Shetland is Europe. In total, 23% of Leisure visitors to Shetland in 2019 were from Europe.
- The most prevalent European countries were Germany (4%), the Netherlands (3%) and France (3%).
- The USA accounted for 7% of Leisure visitors, while 7% were from Australia.
- Comparing the origin profile of Leisure visitors in 2019 to 2017 reveals a decrease in the proportion from Scotland and an increase in the proportion from overseas. In 2017, 30% of Leisure visitors were from Scotland compared to just 19% in 2019. There have been increases in the proportions coming from Europe (18% in 2017) and North America (7% in 2017)
- European visitors had a younger age profile than visitors from other countries – 35% were aged under 45 compared to 16% of North American visitors and 14% of rest of UK visitors.

Origin – Leisure visitors



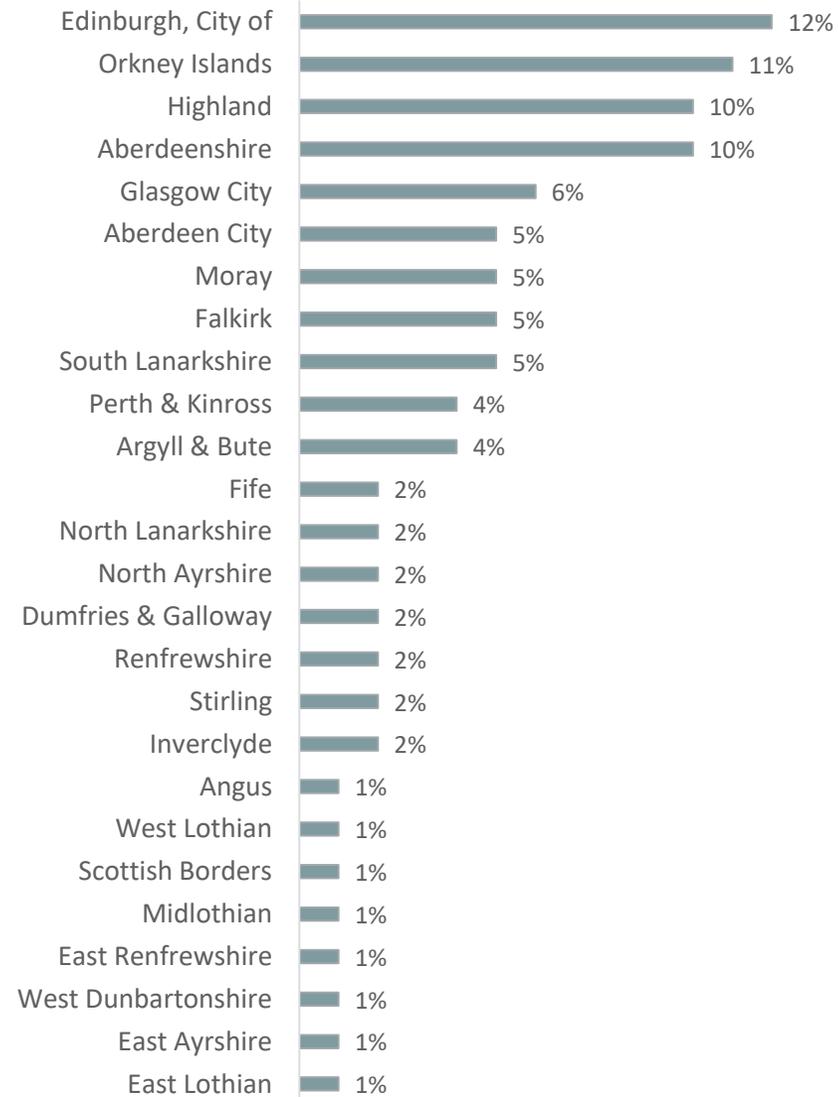
Base (All Leisure calibration): 851

Visitor profile

Origin

- Visitors to Shetland from Scotland were widely dispersed geographically, with around one in ten coming from each Edinburgh (12%), Orkney (11%), the Highlands (10%) and Aberdeenshire (10%).
- Edinburgh, Aberdeenshire and Highland were also the top Scotland origin locations in 2017, although only 5% of visitors were from Orkney last time.
- This profile of visitors in 2019 was very similar across Leisure, VFR and Business visitors, although a higher than average proportion of Leisure visitors (22%) came from Edinburgh.

Origin – Scotland visitors



Locations with less than 1% are omitted from the chart.

Base (All Scotland visitors): 143



Visitor profile

Origin

- Visitors from England also came from a variety of regions.
- The top origin locations were the South East and the North West.
- There has been an increase in the proportion of visitors from London in 2019 (12%) compared to 2017 (5%) and a corresponding decrease in the proportion from East Anglia/East England (9% in 2017 to 4% in 2019).
- There were no significant differences in these findings between Leisure, VFR and Business visitors.

Origin – England visitors

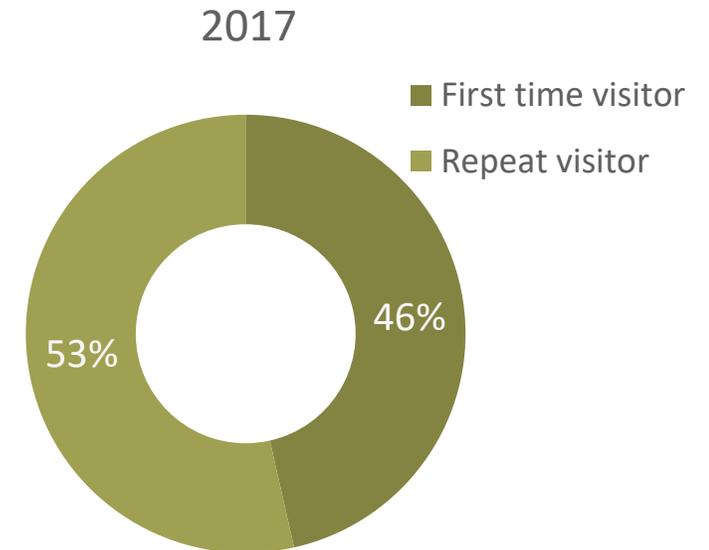
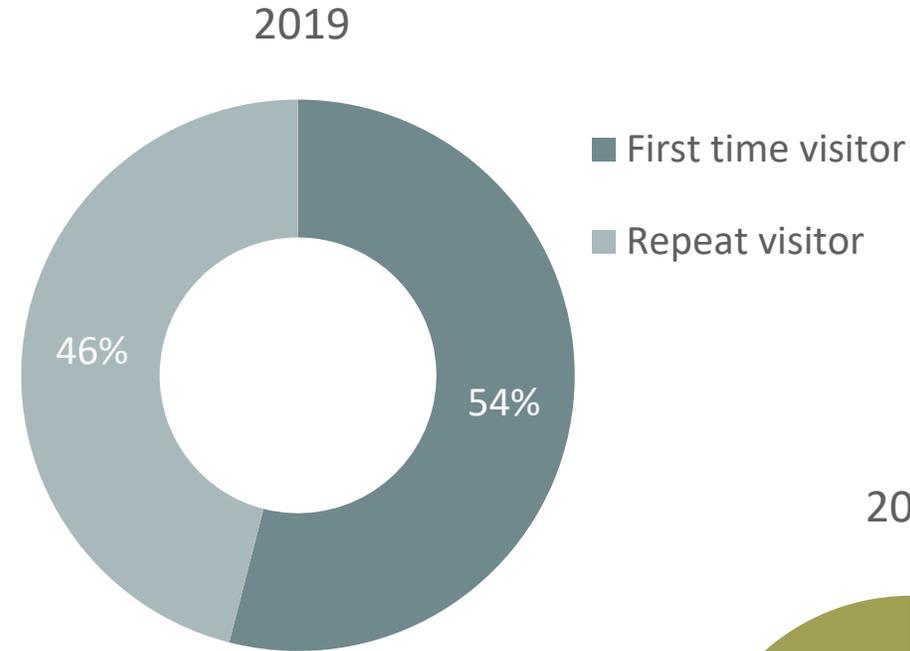


Visitor profile

First time/repeat visitors

- The largest proportion of visitors to Shetland in 2019 (54%) were first time visitors to the islands.
- This represents an increase in first time visitors since 2017, when 46% had not been before.

Number of times visited Shetland



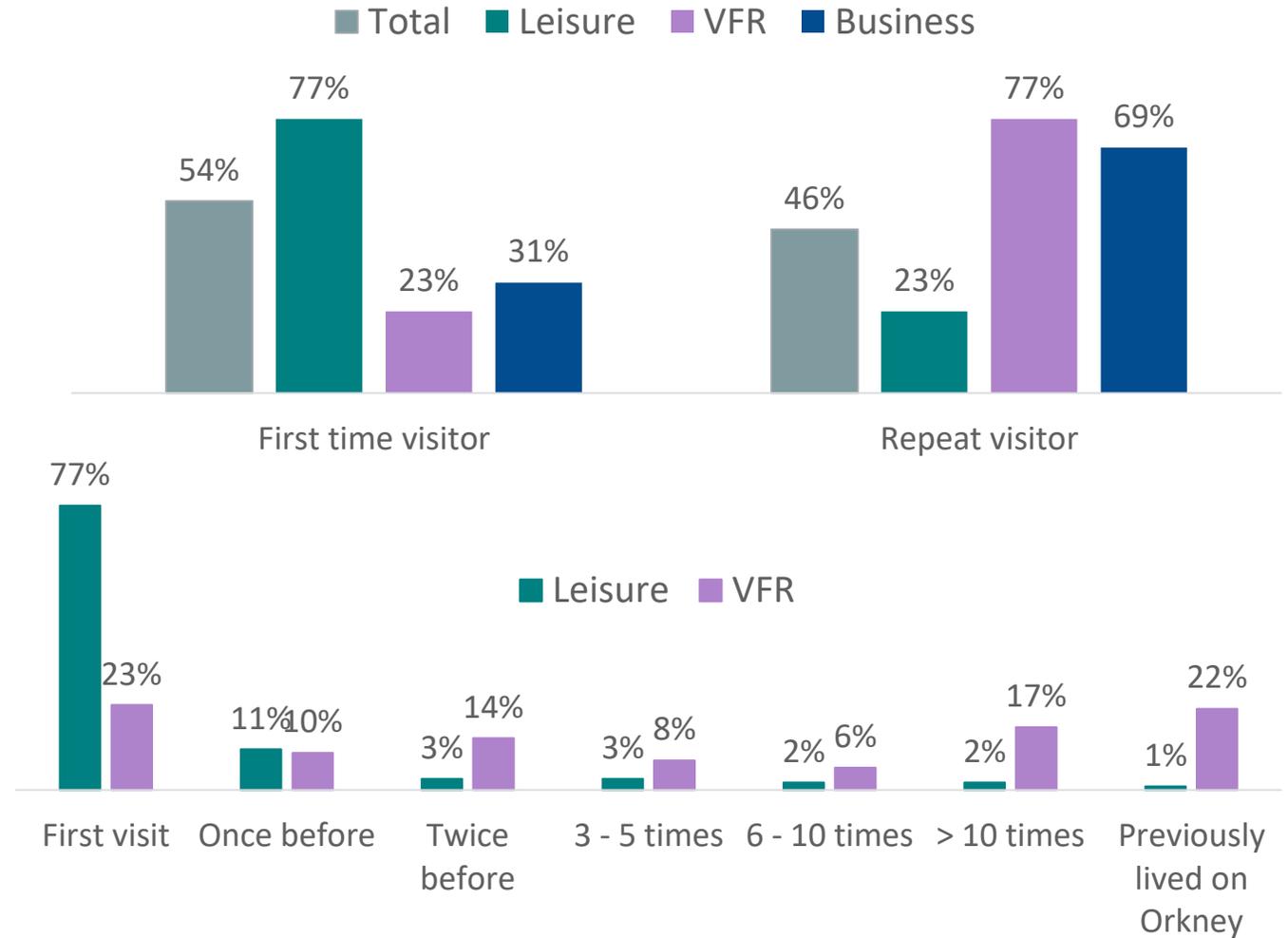
Base (All excluding rotational shift workers) 2019: 407, 2017: 825

Visitor profile

First time/repeat visitors

- Over three quarters of Leisure visitors were first time visitors to Shetland, while the majority of VFR (77%) and Business (69%) visitors had been before.
- The proportion of Leisure visitors who were visiting Shetland for the first time was higher in 2019 than in 2017 (64%).
- Amongst Leisure visitors, those from overseas were more likely to be first time visitors (86%) than those from Scotland (65%) or the rest of UK (73%).

Number of times visited Shetland



Q15: Approximately how many times have you visited Shetland before your recent trip?

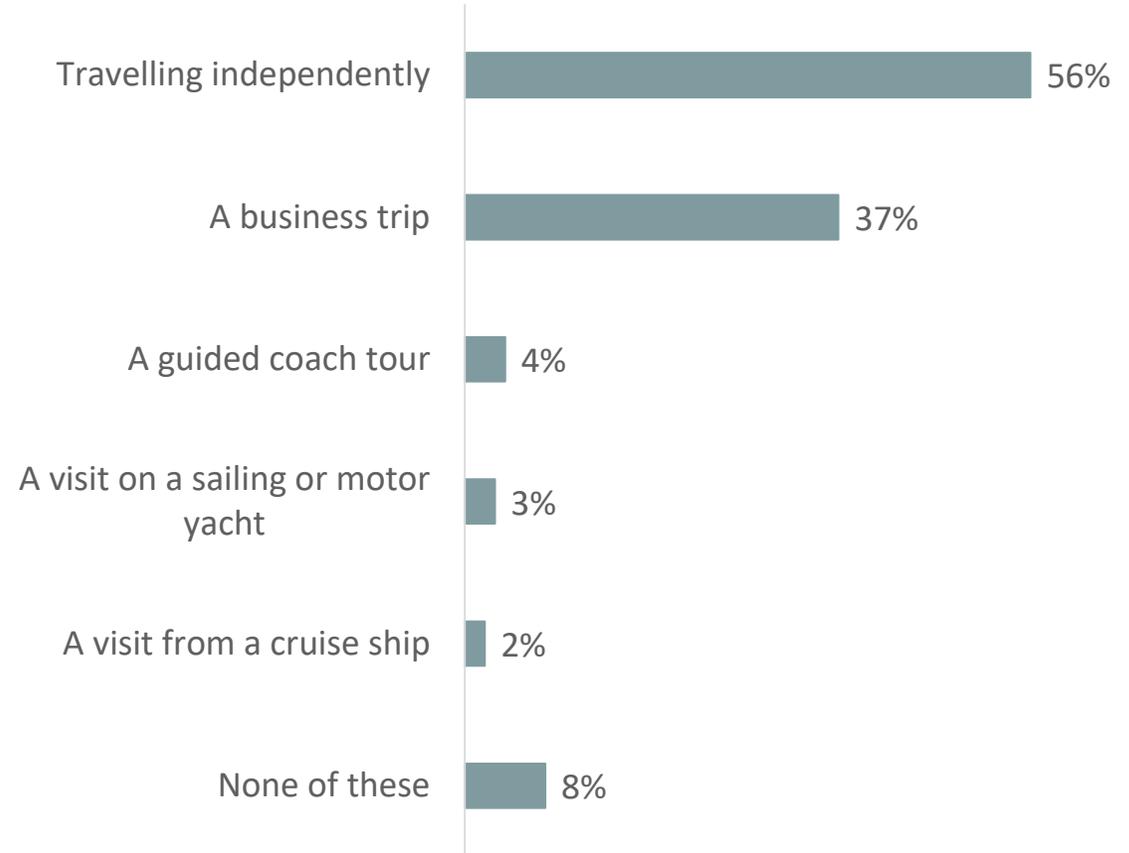
Base (All, excl. rotation shift workers): Total 407; Leisure 259; VFR 89; Business 51 23

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.
- Over half of repeat visitors (56%) reported that they had previously travelled independently to Shetland. While just over one third has previously been to Shetland on a business trip.
- As might be expected, a higher proportion of Business visitors reported that they has been previously on a business trip (88%) than Leisure (7%) or VFR (2%) visitors. The majority of Leisure (72%) and VFR (80%) visitors had previously visited Shetland independently.

Types of trip for previous visits to Shetland

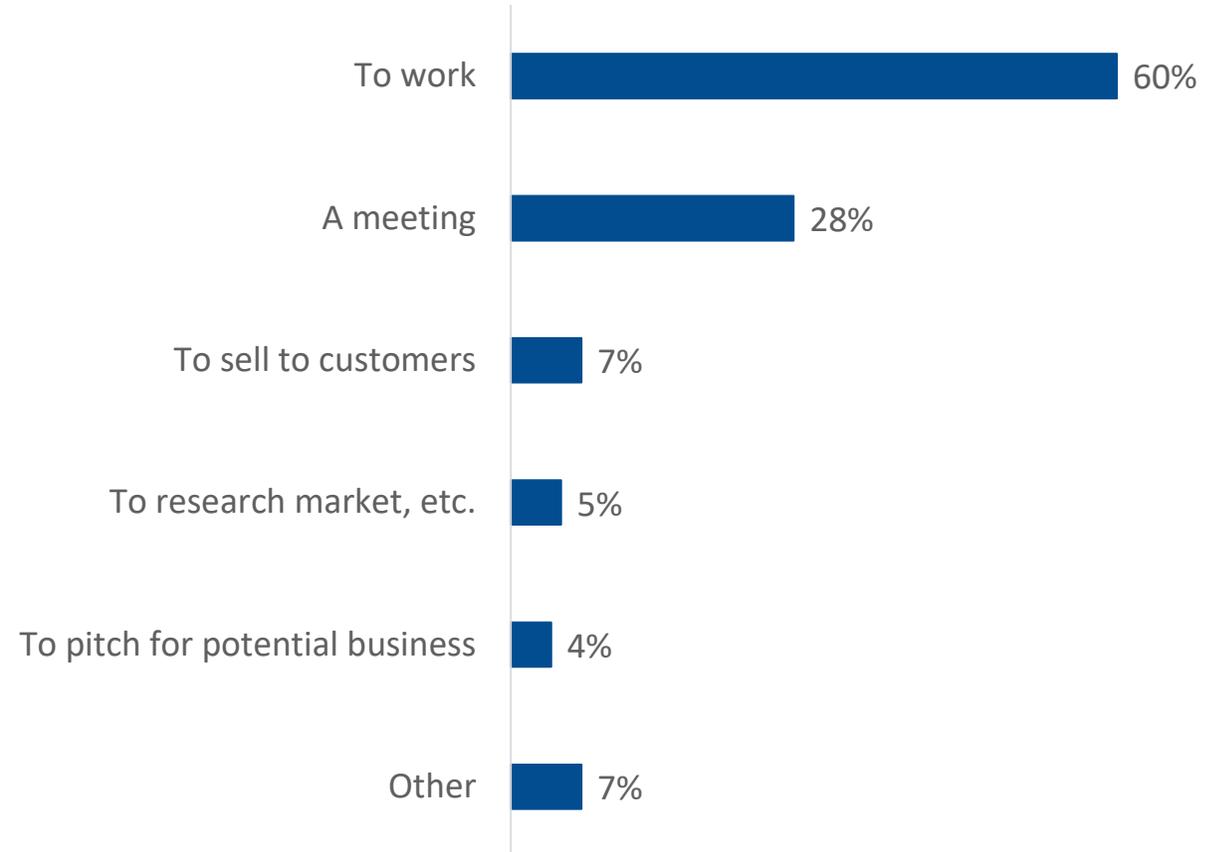


Visitor journey

Business journey

- The largest proportion of Business visitors (60%) had been to Shetland to work. A further 28% were attending a meeting.

Reason for visiting Shetland - Business

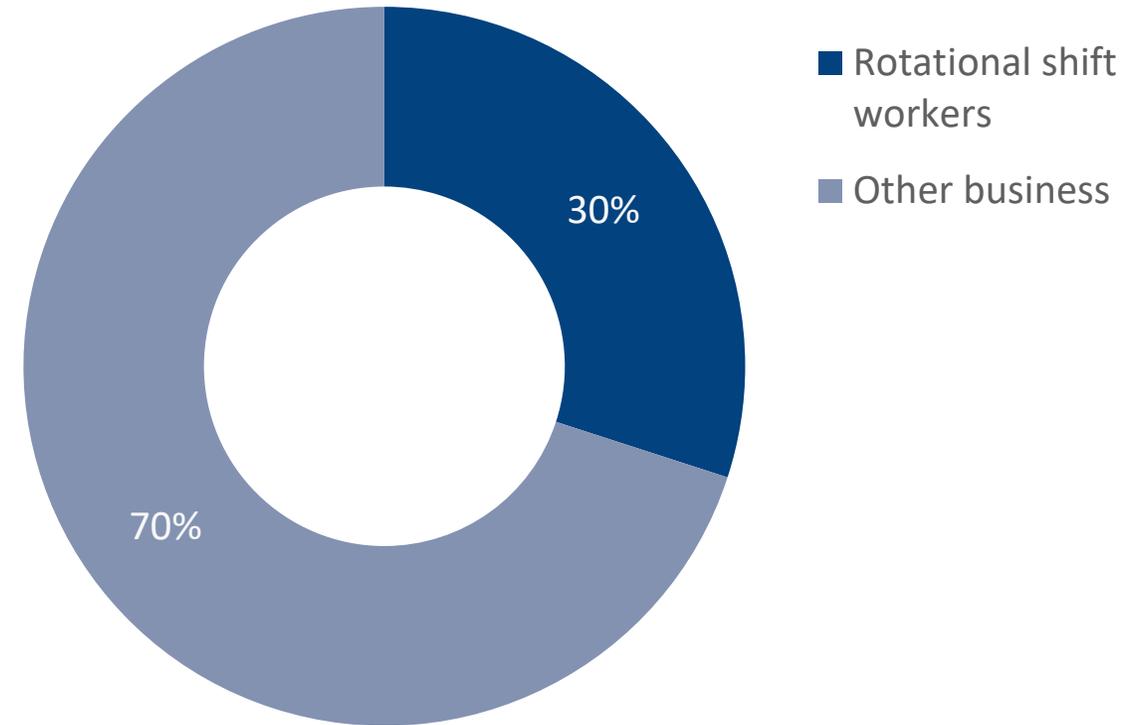


Visitor profile

Business

- Overnight Business visitors were asked if they would be staying on the islands for an extended period of time, but normally live on the mainland. Just less than one third of business respondents stated that they were staying for a long period of time.
- This proportion is higher than in 2017 when 24% were classified as rotational shift workers.

Rotational shift workers



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

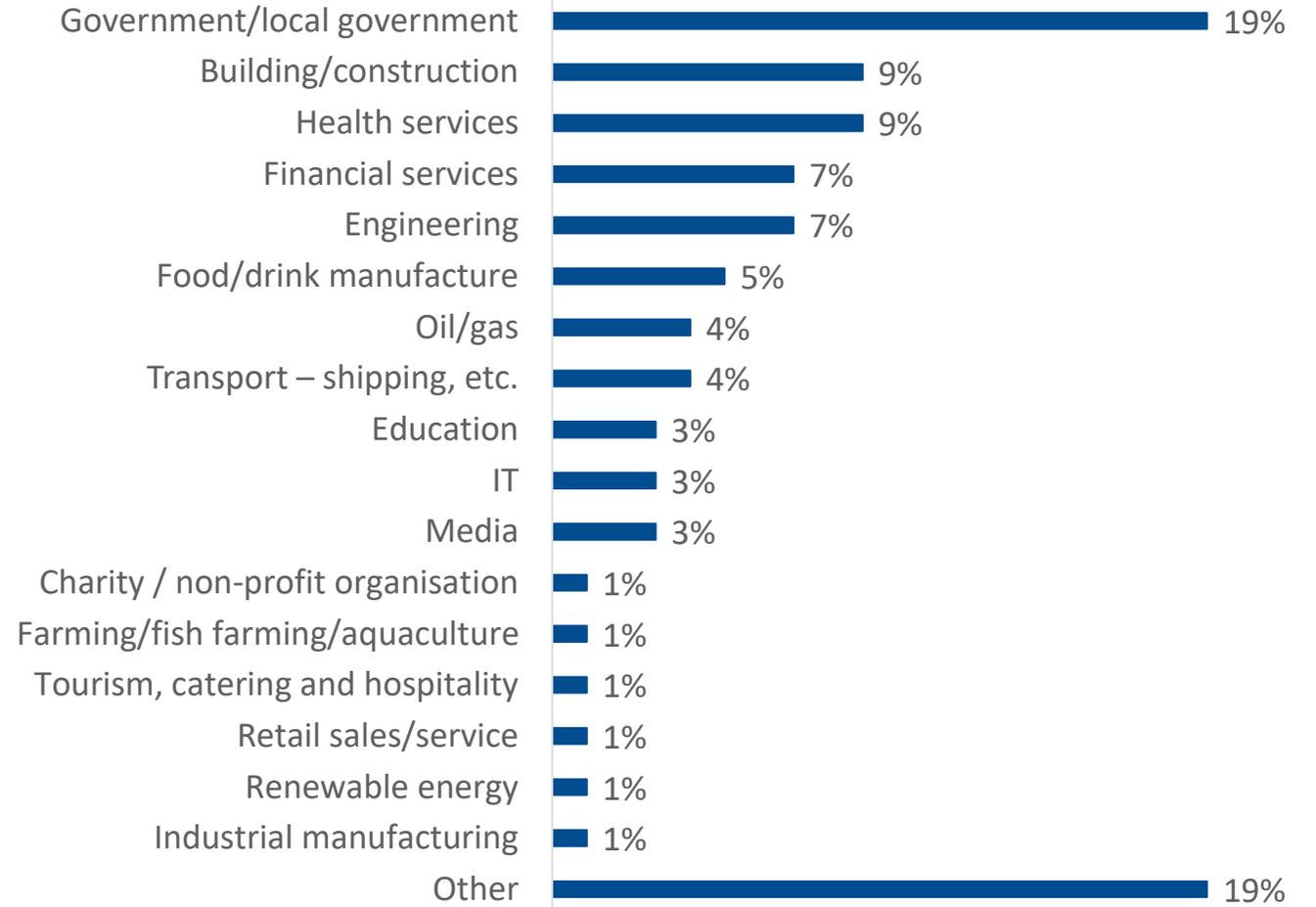
Base (All Business calibration): 382

Visitor profile

Business

- A wide range of business sectors were cited by Business visitors. The most prevalent was government/local government, followed by building/construction, health services, financial services and engineering.
- 19% of business visitors (14 respondents) stated another sector not listed. These included arts/culture (4 respondents) and telecommunications (2 respondents).

Business sector



Base (All business): 74

Visitor profile

Summary



- As in 2017, half of visitors to Shetland in 2019 were visiting for leisure purposes. There has been an increase people visiting friends and relatives (from 11% in 2017 to 20% in 2019) and a decrease in the proportion on a work/business trip (from 35% in 2017 to 28% in 2019).
- The profile of respondents was skewed to males (55%) and those aged 45 years or older (69%).
- A higher proportion of Business visitors were male (73%), compared to Leisure (48%) and VFR (46%) visitors.
- The majority of visitors to Shetland in 2019 (72%) came from the UK – with 40% from Scotland and 32% from the rest of the UK.
- Amongst Leisure visitors, 56% were from the UK (19% Scotland; 37% rest of UK). Overseas Leisure visitors were predominantly from Europe (23% of all Leisure visitors), with many also visiting from North America (11%) and Australia/New Zealand (10%).
- More than three quarters of Leisure visitors were visiting Shetland for the first time (77%). The proportion of first time Leisure visitors was higher in 2019 than in 2017 (64%).
- Consistent with 2017, VFR (77%) and Business visitors (69%) in 2019 were more likely to be repeat visitors to the islands.



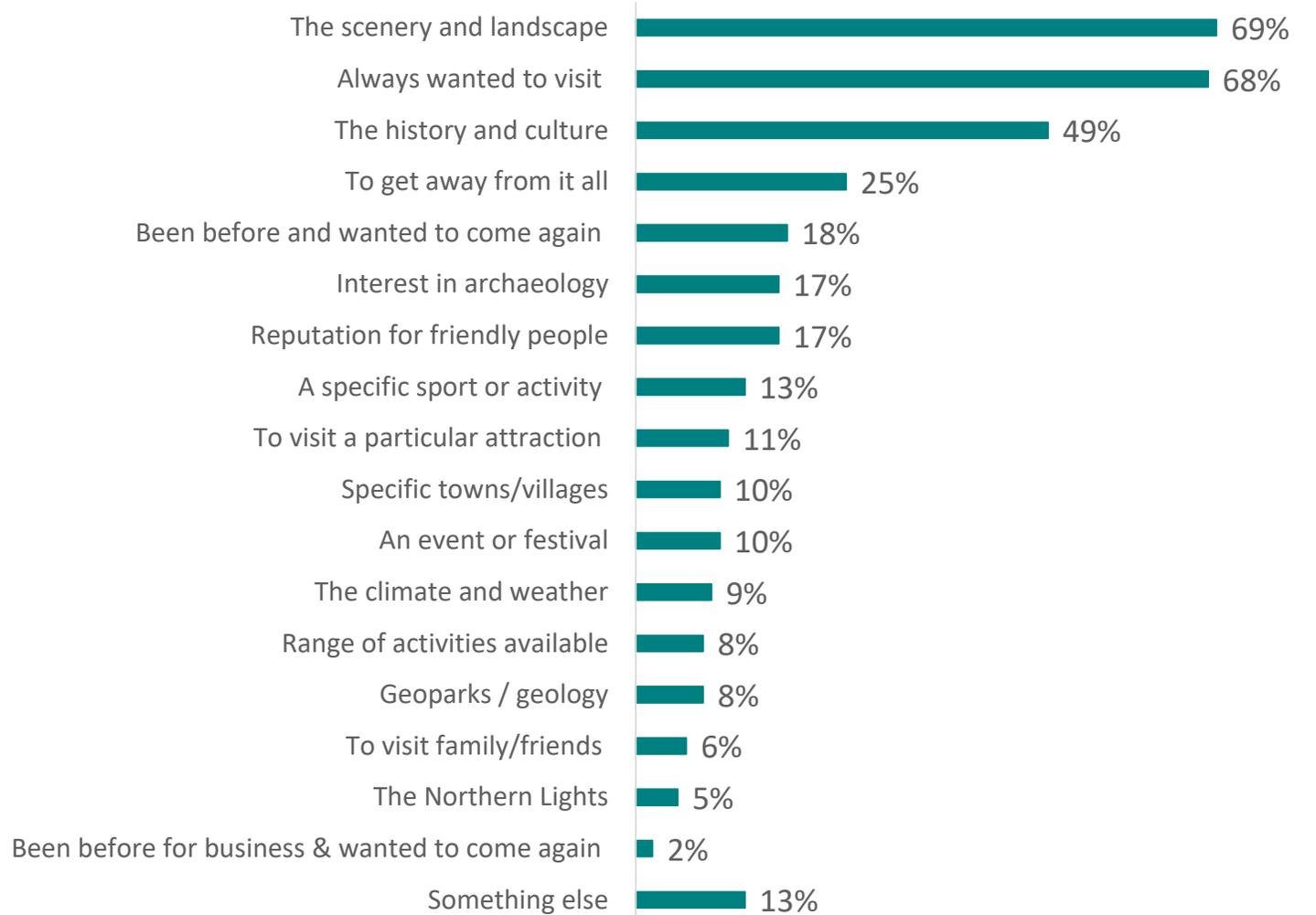
Visitor Journey

Visitor journey

Motivations

- The key reasons for visiting Shetland cited by Leisure visitors were the scenery and landscape (69%) and the history and culture (49%). Two thirds (68%) stated 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, however, higher proportions of visitors selected each in 2019. For example, only half stated they had always wanted to visit in 2017 compared to two thirds in 2019. Similarly, 57% mentioned the scenery and landscape in 2017 compared to 68% in 2019.
- Getting away from it all was more often mentioned by visitors from the rest of UK (36%) than those from Scotland (12%) or overseas (21%).
- The scenery and landscape was more likely to be mentioned by visitors from overseas (79%) or the rest of the UK (69%) than visitors from Scotland (45%). North American visitors (65%) were particularly interested in history and culture.

Reasons for visiting Shetland - Leisure visitors



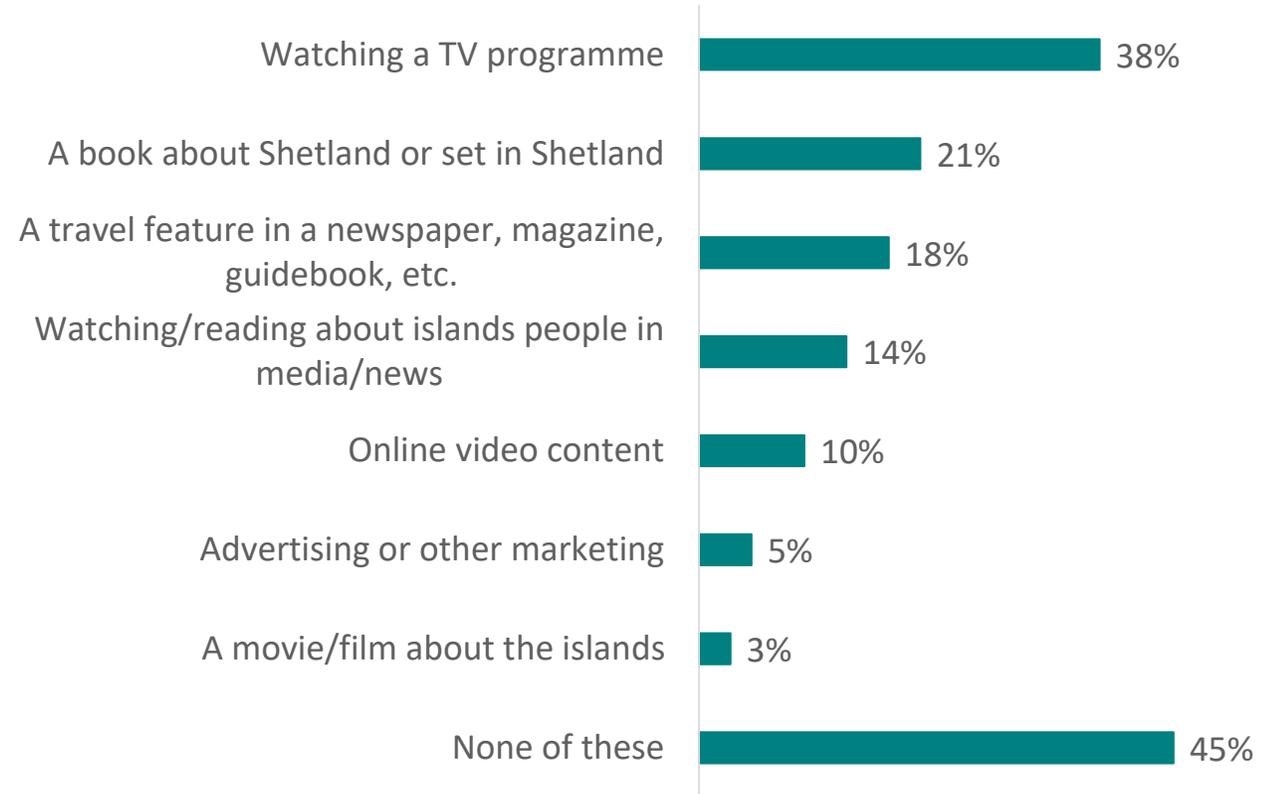
Base (All Leisure): 259

Visitor journey

Inspiration

- Over half of Leisure visitors (55%) reported that they had been inspired to visit Shetland by something they had seen or read. This is a higher proportion than in 2017 when 46% were similarly inspired.
- TV programmes were particularly encouraging - mentioned by 38% of Leisure respondents. The main TV programme cited by respondents was the BBC detective series 'Shetland'. Almost all of those who said they had been inspired by a TV programme mentioned Shetland – 90 of 103 respondents (87%). Other TV programmes mentioned included Islands Medics (5 respondents) and Coast (3 respondents).
- Books about Shetland were reported to have inspired one fifth of Leisure visitors. These included the Shetland series of books by Ann Cleeves (34 responses) and The Shetland Bus (2 responses).
- Overseas visitors were more likely to be inspired by books, films, TV, etc. (61%) than those from Scotland (39%). Just over half of visitors from the rest of the UK (56%) were also inspired by something they saw or read.
- Over a quarter (28%) of overseas visitors also mentioned being inspired by a travel feature.

Inspiration for visiting Shetland - Leisure visitors



Q2: And did any of these prompt you to consider Shetland for this trip?

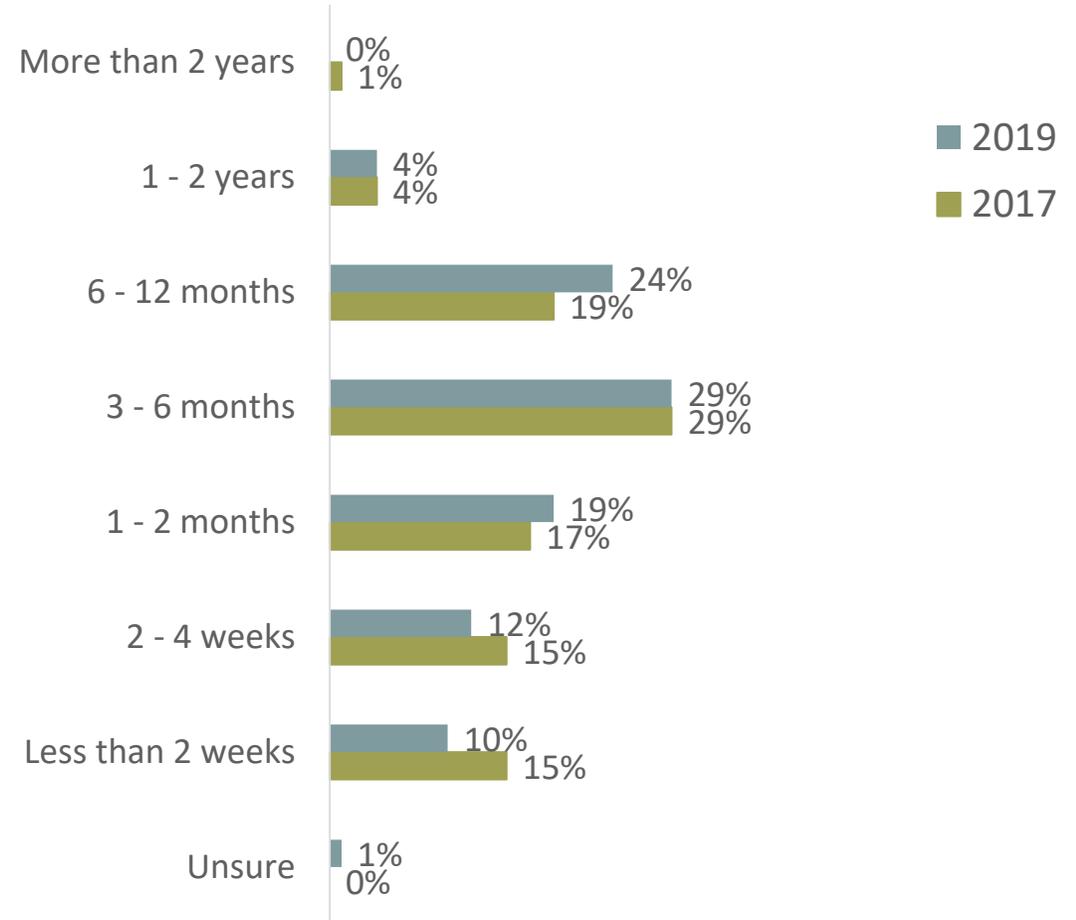
Base (All Leisure): 259

Visitor journey

Planning

- Across the total sample of all visitors in 2019 the majority (70%) planned their visit to Shetland within 6 months of travel.
- Just over a fifth of visitors (22%) planned their visit within one month of travel, suggesting that many people visited based on a fairly spontaneous decision.
- The pattern of travel planning closely replicates the findings from 2017, when 76% booked within 6 months. However, there is some evidence of more advance planning in 2019, with fewer planning within one month (22%) than in 2017 (30%).
- The level of advance planning varied by visitor type, with Leisure visitors the most likely to plan some months ahead of travel and Business visitors the most likely to make plans close to their date of departure. Full details of planning by each visitor group are shown over.

How far in advance did you plan your trip?



Base (All except rotational shift workers) 2019: 407, 2017: 825

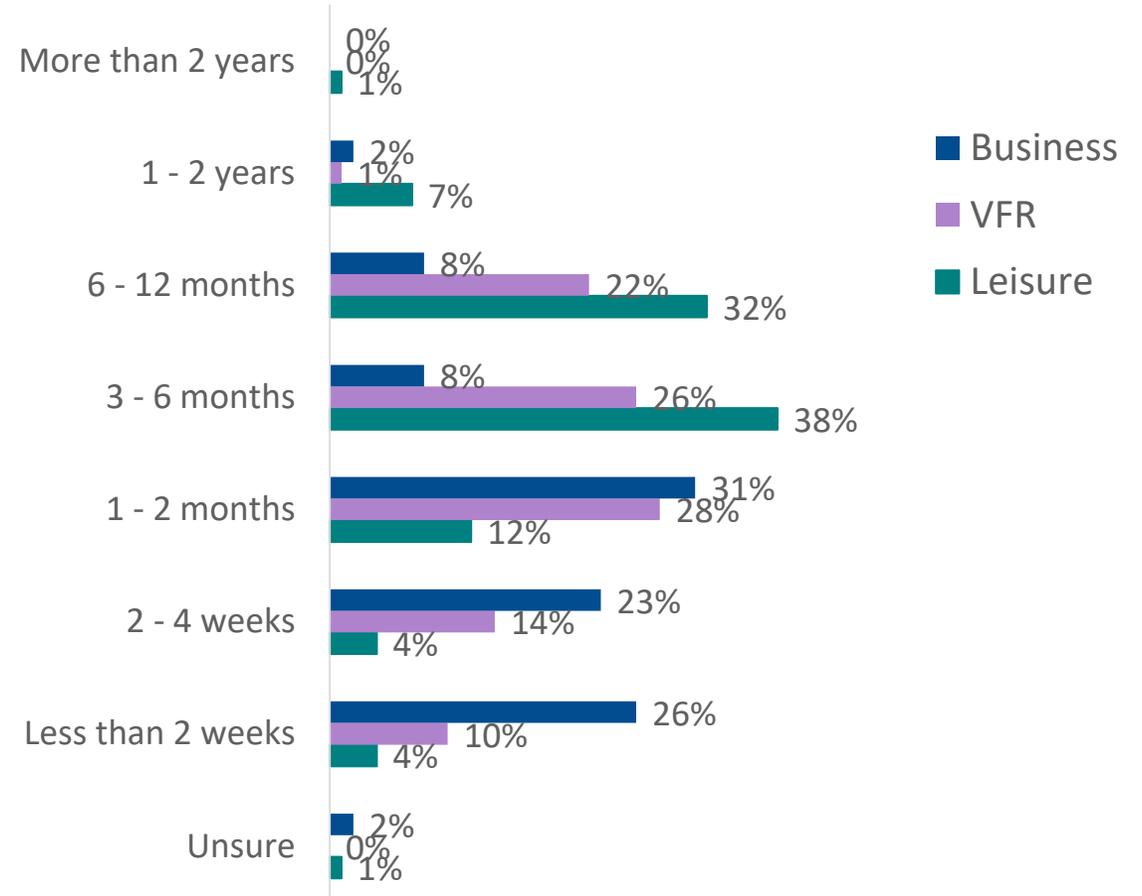
Q4: How far in advance did you start planning your trip? I.e. how much time was there between you starting to plan and actually visiting?

Visitor journey

Planning

- Leisure visitors showed the highest levels of advance planning – two fifths (40%) planned more than 6 months before their visit and 38% started their planning 3 to 6 months in advance.
- VFR visitors demonstrated less advance planning than Leisure visitors – only 22% planned more than 6 months in advance. Indeed, 24% VFR visitors started the process within a month of travel, and a further 28% 1 to 2 months before.
- As we might expect, Business visitors had the lowest levels of advance planning - 80% of Business visitors started planning their trip within two months of travel.
- The pattern of response across the three visitor types was similar in 2017 to 2019.

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



Base (All except rotational shift workers):
Leisure 259; VFR 89; Business 51

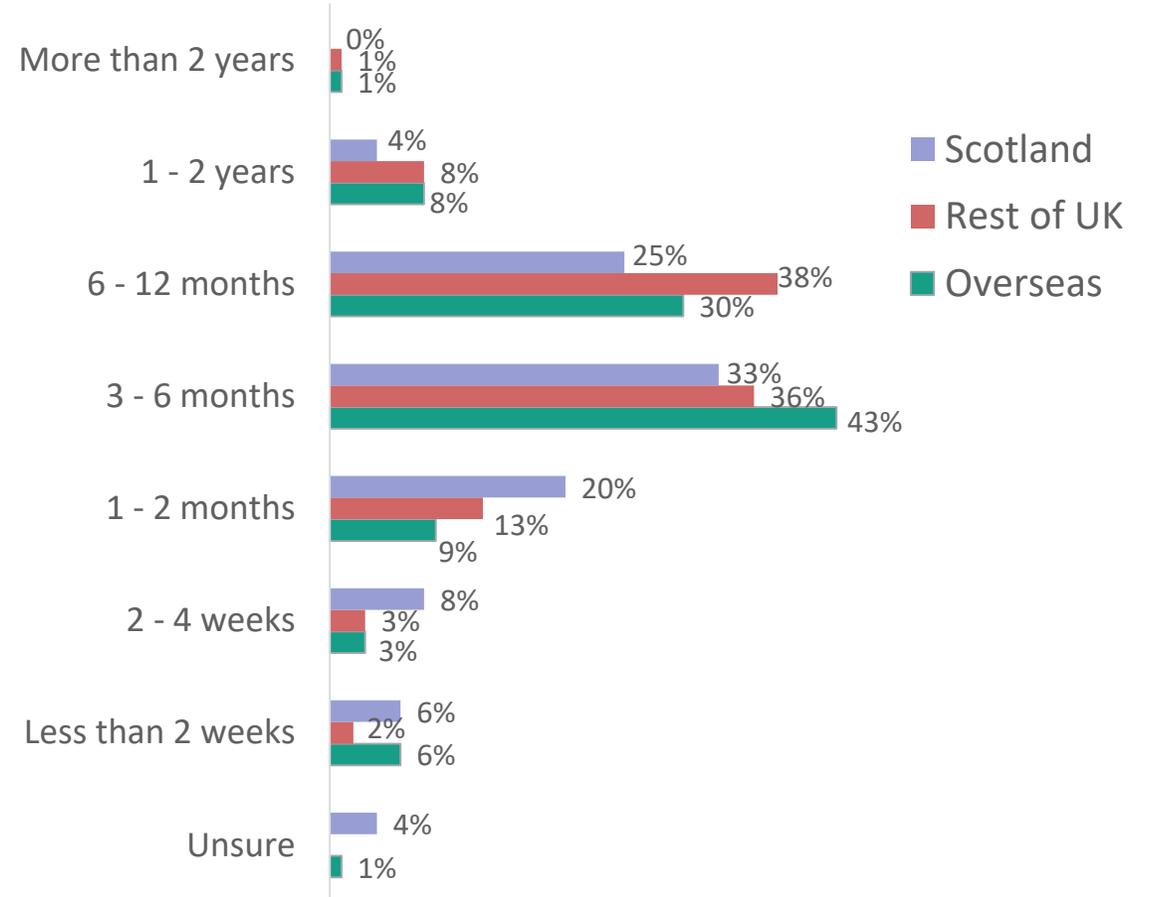
Q4: How far in advance did you start planning your trip? I.e. how much time was there between you starting to plan and actually visiting?

Visitor journey

Planning

- Leisure visitors from Scotland were the most likely to start planning within two months of travel (34%).
- Visitors from the rest of the UK and overseas showed a very similar pattern of response; most planned their trip at least 3 months in advance – rest of UK visitors (84%) and overseas visitors (82%).

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



Base (All except rotational shift workers):
 Scotland 51 ⚠️; rest of UK 104; overseas 104

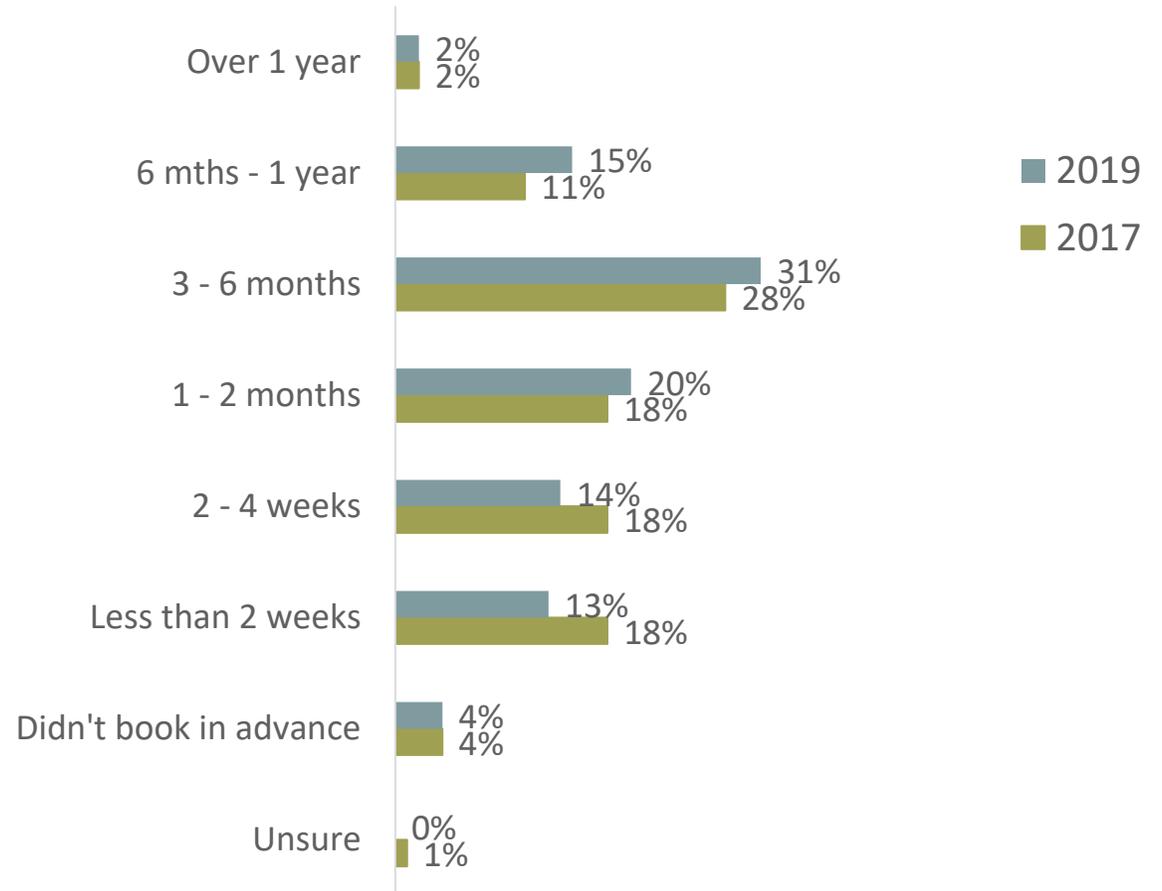
Q4: How far in advance did you start planning your trip? I.e. how much time was there between you starting to plan and actually visiting?

Visitor journey

Booking

- As we found in 2017, the pattern of data in terms of booking the trip was very similar to planning – the majority overall (82%) booked within 6 months or did not book at all. However, there was some evidence of more advance booking in 2019 with 68% booking more than a month ahead compared to 59% in 2017.
- Although 29% planned their trip more than 6 months before travel, only 17% booked this far in advance, suggesting that some held off booking for some months. This may have been necessary if travel operators timetables were not available at the point of planning.
- Again, differences were noted between the three visitor sub-groups, as noted over.

How far in advance did you book your trip?



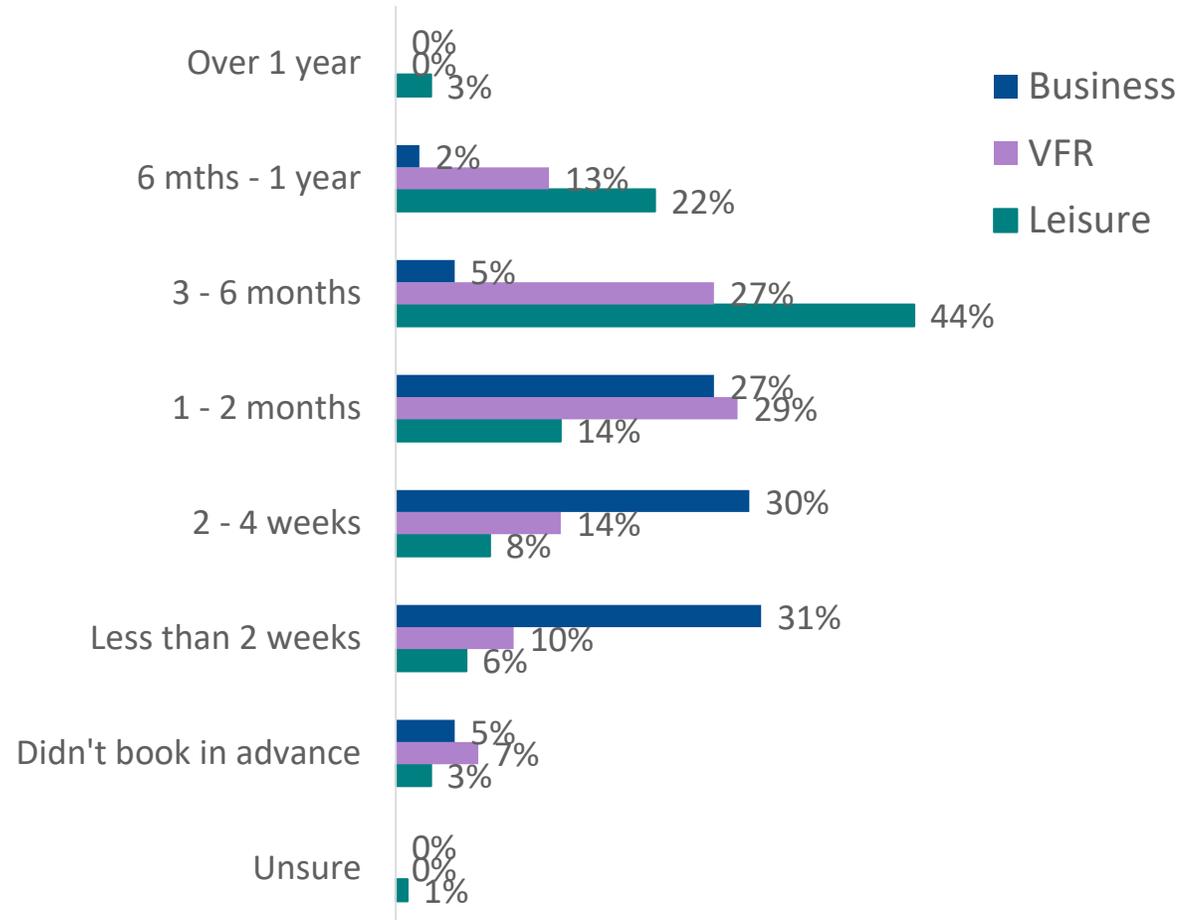
Base (All except rotational shift workers) 2019: 407, 2017: 825

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 – 68% booked more than 3 months before visiting.
- Business visitors were the most likely to book within one month of travel – 60% of Business visitors, compared to 13% of Leisure visitors and 25% of VFR visitors.
- The sample of VFR visitors was more evenly split between advance planners and spontaneous travellers – 32% booked within a month or did not book at all, 29% booked 1 to 2 months in advance and 40% booked ahead by 3 months or more.

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



Base (All except rotational shift workers):
Leisure 259; VFR 89; Business 51

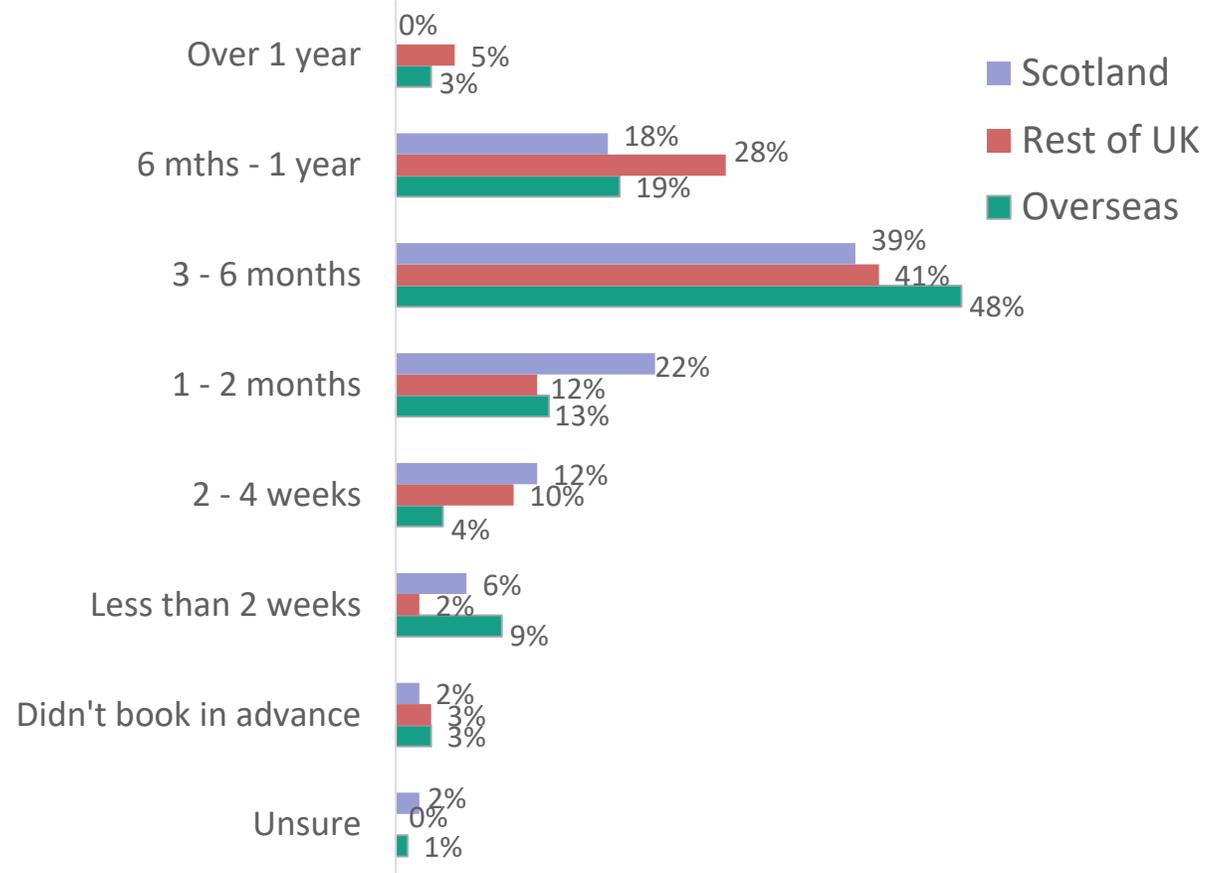
Q5: How far in advance did you book your trip? I.e. how much time was there between booking the trip and going?

Visitor journey

Booking

- The timing of booking their trip was fairly consistent for visitors from Scotland, Rest of UK and overseas – the differences are not statistically significant. For all visitor types the typical timing of booking was 3 to 6 months before the trip.
- The booking patterns for visitors from each location were similar to 2017, although fewer Scotland visitors booked within 2 weeks in 2019 (6%) than in 2017 (20%).

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



Base (All except rotational shift workers):
Scotland 51 ⚠️ ; rest of UK 104; overseas 104

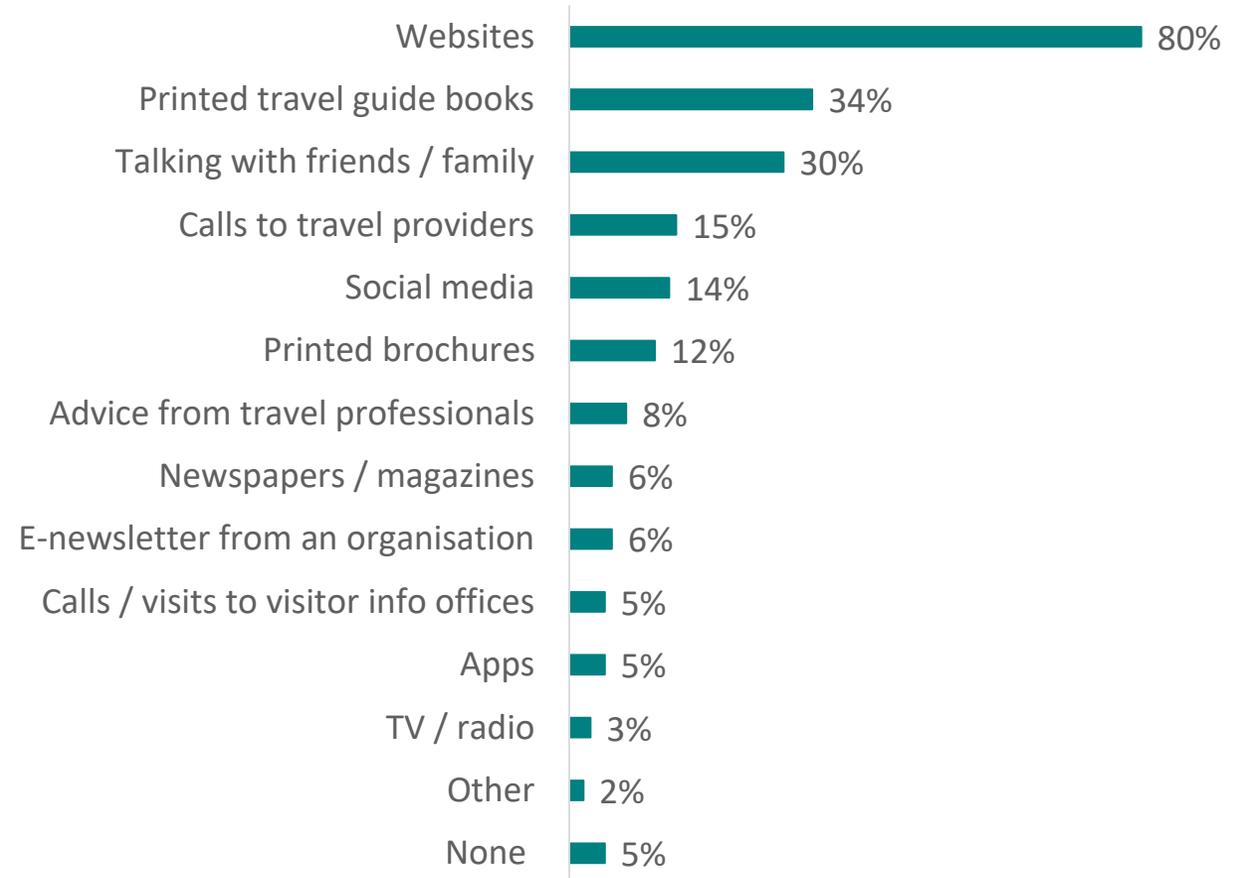
Q5: How far in advance did you book your trip? I.e. how much time was there between booking the trip and going?

Visitor journey

Sources of information

- Websites were the key source of information for Leisure visitors when planning their trip, mentioned by 80% of Leisure visitors. Word of mouth was also critical, with 30% citing talking to family and friends.
- Despite the reliance on online resources for many, printed travel guide books were also a popular source of information, mentioned by one third of Leisure visitors.
- Travel professionals/providers were less likely to be mentioned than sources used independently by visitors – 15% cited calls to travel providers, 5% used visitor information offices and 8% took advice from travel professionals.
- Social media was mentioned by 14% of visitors, while 5% mentioned apps, including TripAdvisor, Historic Scotland, Airbnb, Google maps, Booking.com and Shetland Travel. Social media was mentioned by 26% of visitors aged under 55 years old, compared to just 8% of those aged 55 or older.
- The sources of information used by visitors in 2019 were very similar to those mentioned in 2017; however there were increases in those mentioning websites (68% in 2017), travel guide books (23%) and social media (9%), while fewer Leisure visitors mentioned talking to friends or family (41% in 2017).

Sources of information during planning - Leisure visitors



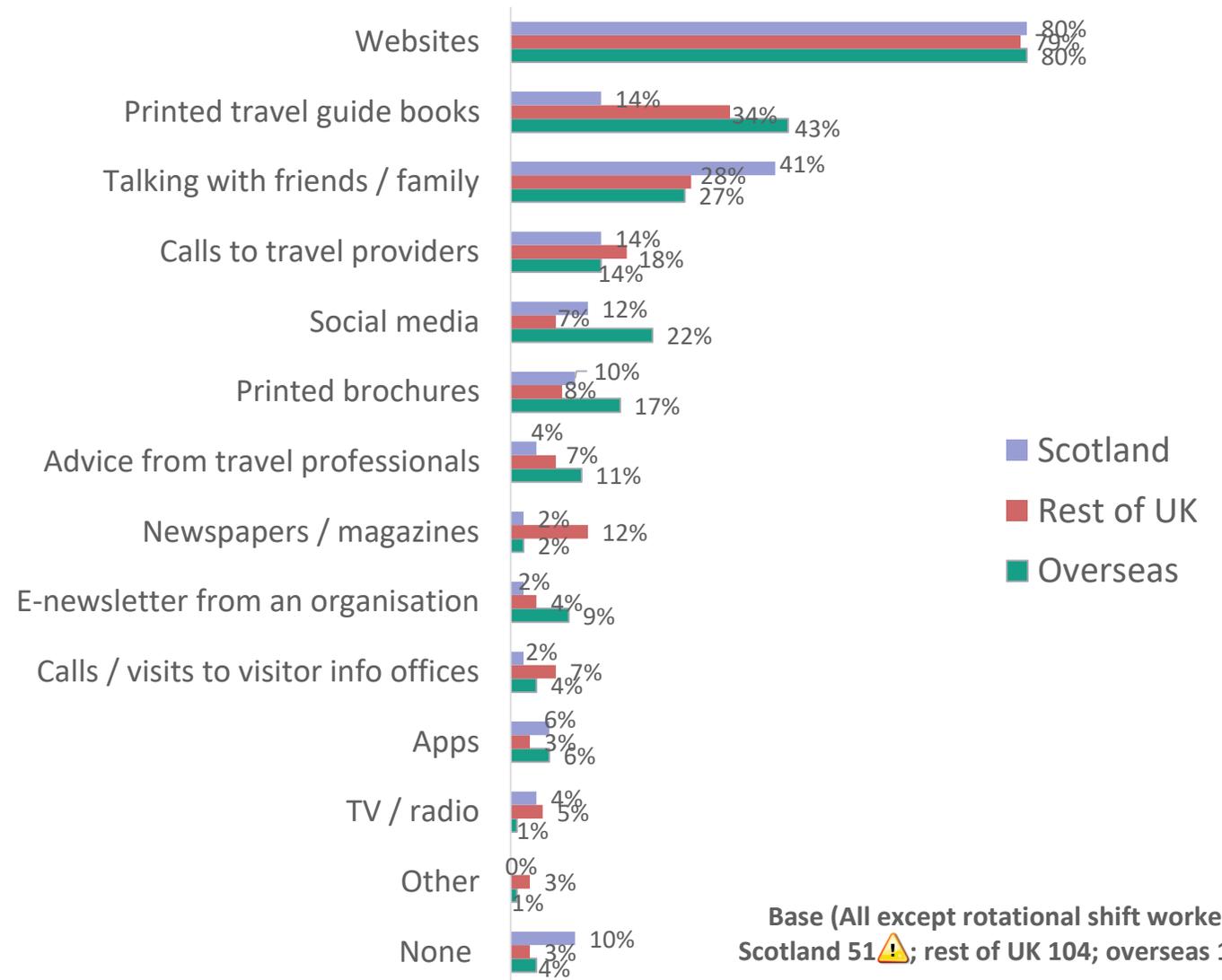
Visitor journey

Sources of information

- There were some interesting variations in sources of information used by Leisure visitors when the data was analysed by visitor origin.
- Overseas Leisure visitors (43%) and those from the rest of the UK (34%) were more likely to use printed travel guide books than those from Scotland (14%).
- Visitors from the rest of the UK were more likely to use newspapers and magazines (12%) than those from Scotland (2%) or overseas (2%).
- Social media usage tended to be higher for visitors from overseas (22%), with those from North America (28%) particularly likely to use social media for information.

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

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

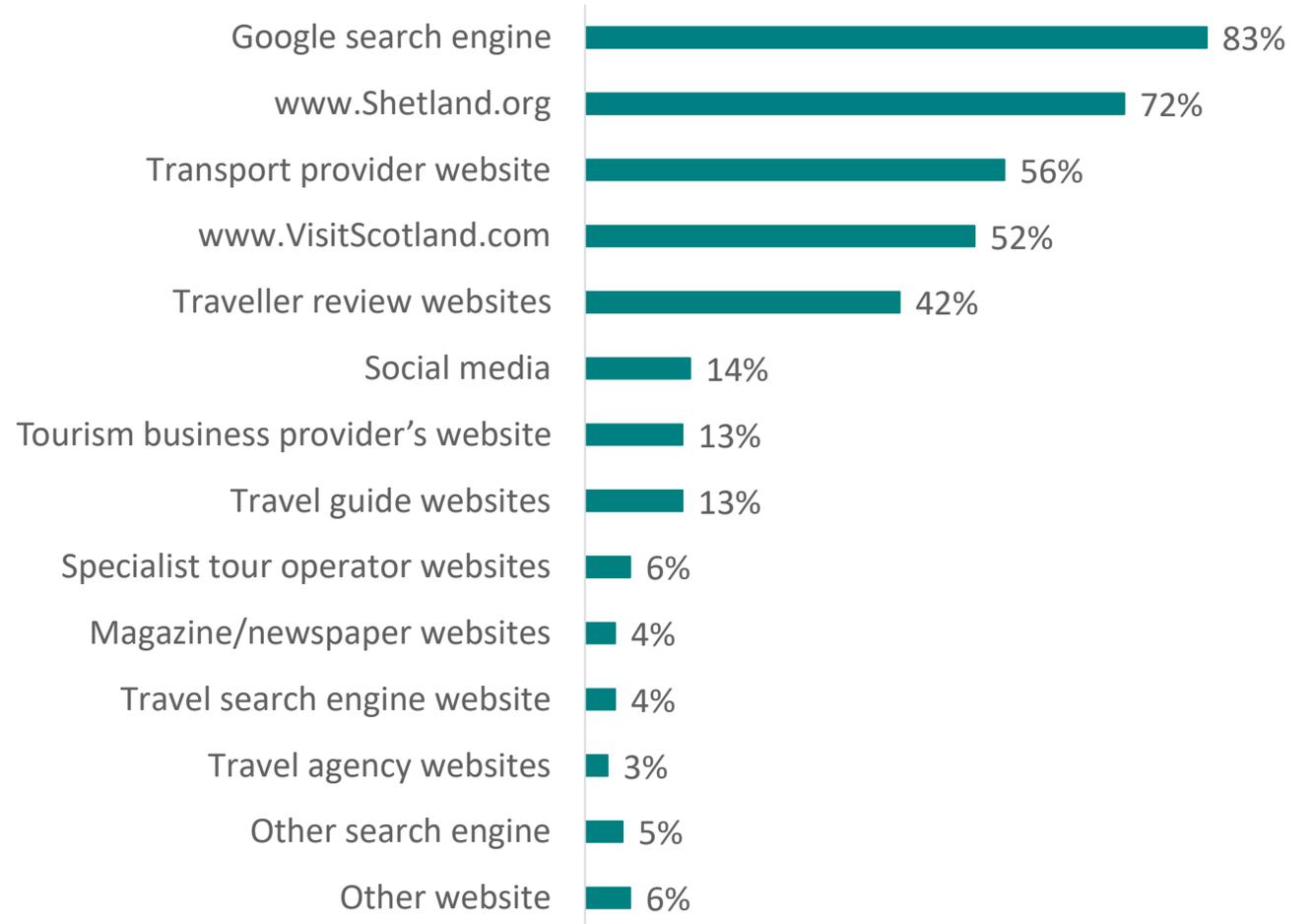


Visitor journey

Sources of information

- Leisure visitors who had sought information online were asked which websites or search engines they had used. The majority (83%) reported using the Google search engine as a starting point.
- The two key tourism websites cited were Shetland.org (72%) and VisitScotland.com (52%). The proportions of Leisure visitors mentioning these websites have increased since 2017 when 64% cited Shetland.org and 41% mentioned VisitScotland.com.
- More than half (56%) also reported using transport providers' websites, whilst 42% looked at traveller review websites. More people mentioned traveller review websites than in 2017 (32%).

Websites and search engines used - Leisure visitors



Base (Leisure who used online info): 206

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

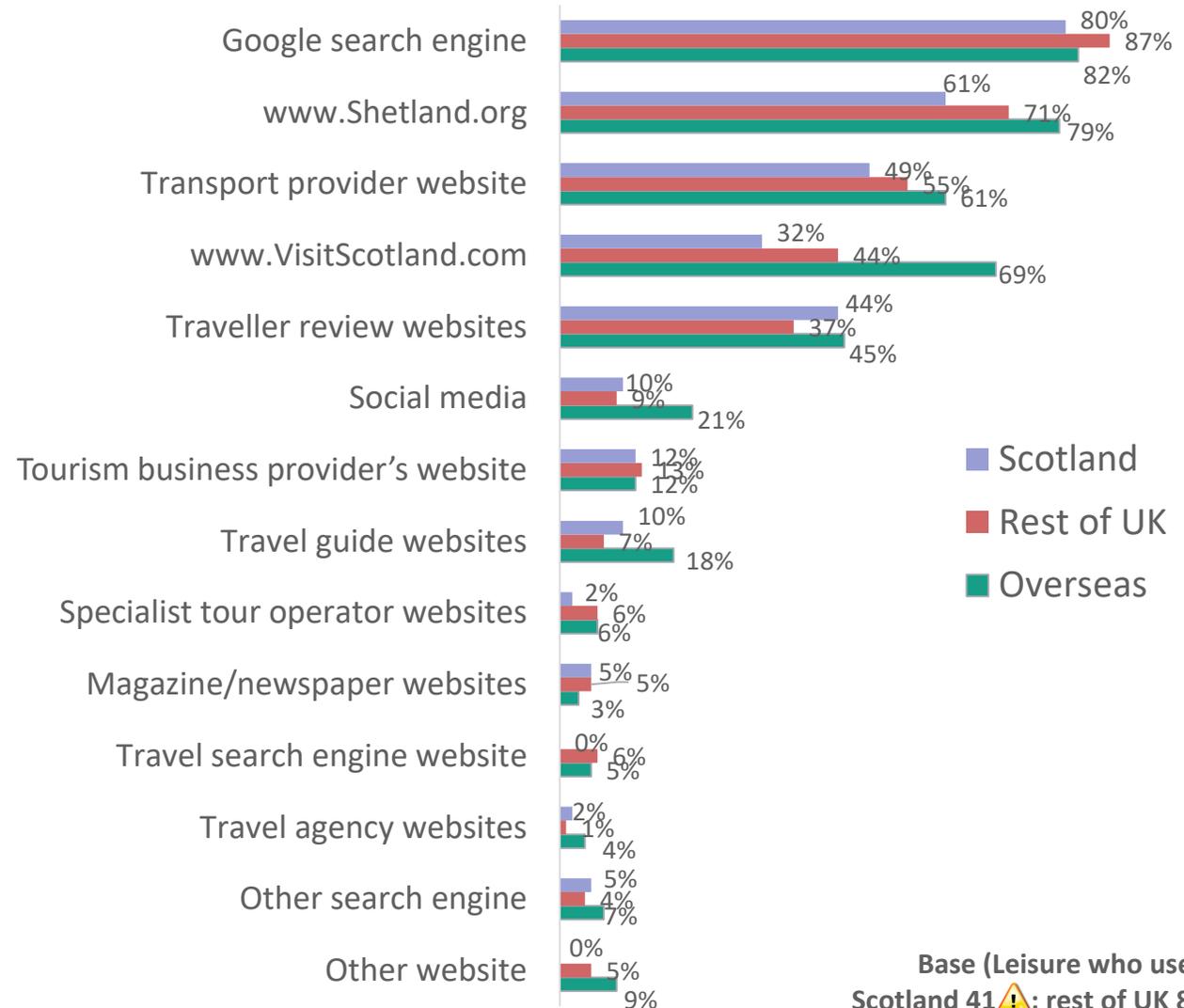
Visitor journey

Sources of information

- All Leisure visitors used a range of online information when planning their trip. Overseas visitors in particular tended to use multiple sources.
- The Google search engine was the most popular online source used by all Leisure visitors whether from Scotland, the rest of the UK or overseas.
- Shetland.org was also frequently cited, but slightly more so for overseas (79%) and rest of UK visitors (71%) than Scotland visitors (61%). VisitScotland.com was also widely used, particularly by overseas visitors (69%).
- Transport provider websites and traveller review websites were equally popular for visitors from the UK and overseas.
- A higher than average proportion of overseas visitors also used travel guide websites (18%) and social media (21%).



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



Base (Leisure who used online info):
 Scotland 41 ⚠️; rest of UK 82; overseas 83

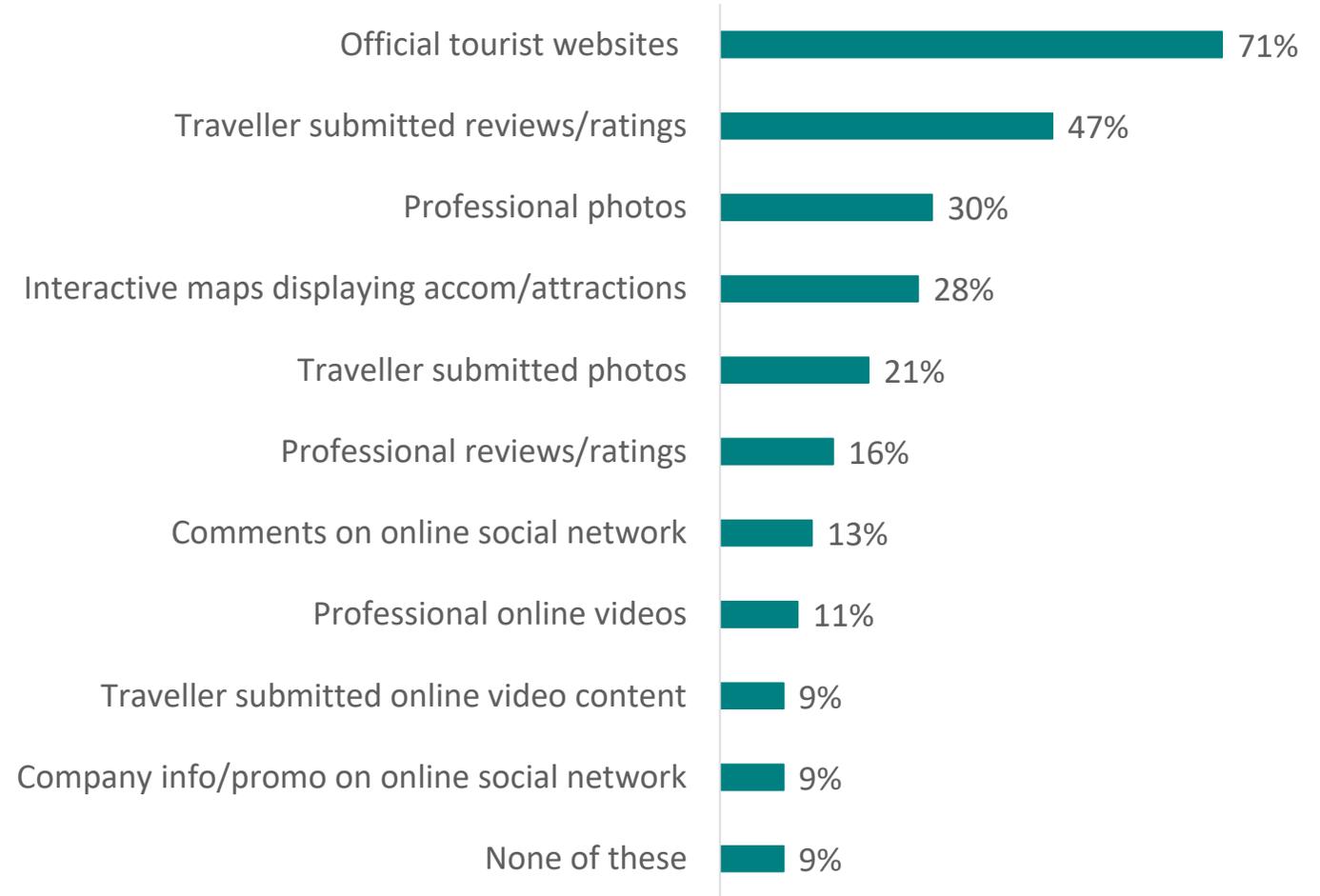
Q8: What types of websites or search engines did you use when planning your visit to Shetland? Please think only about information gathering during planning your trip rather than booking the trip.

Visitor journey

Sources of information

- Reflecting the high proportions visiting the Shetland.org and VisitScotland.com websites, many visitors (who had viewed online info) reported that they had looked at official tourist websites.
- Traveller reviews were also an important source of information; mentioned by almost half of Leisure visitors who used online information. One fifth of respondents also reported looking at traveller submitted photos online.
- Approximately three in ten of Leisure visitors who used online sources also reported looking at professional photos or interactive maps.
- These findings very closely match the findings from the 2017 survey, with small increases in usage of official tourist websites (63% in 2017) and professional photos (22% in 2017).

Online information used - Leisure visitors



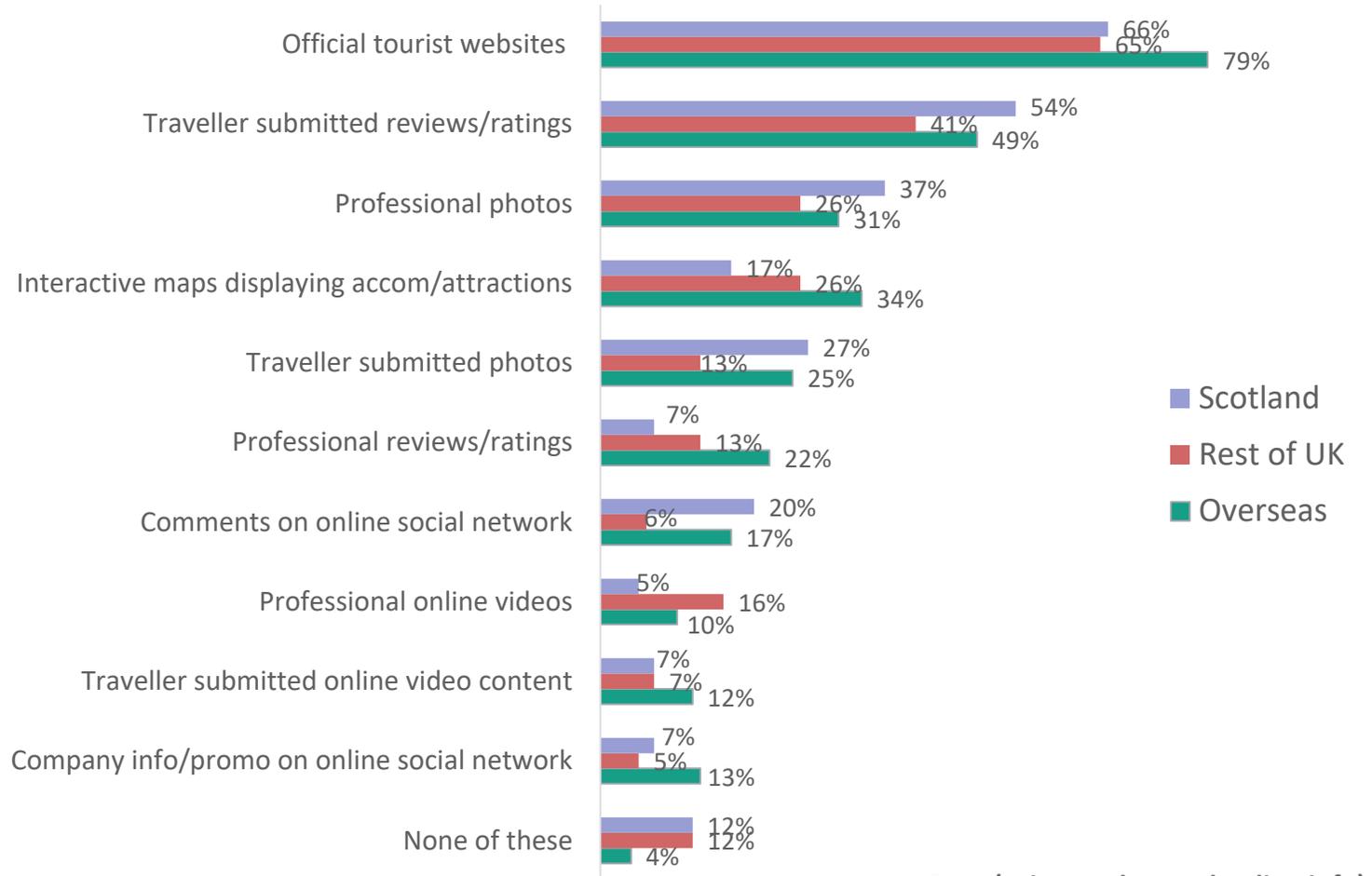
Base (Leisure who used online info): 206

Visitor journey

Sources of information

- Again, overseas visitors were more likely to use a wide range of online information than visitors from Scotland or the rest of the UK.
- Overseas visitors tended to be more likely to mention that they looked at official tourist websites (79%) and professional reviews (22%). Other differences were not statistically significant due to limited base sizes for each sub-sample.

Online information used - by market (Leisure only)



Base (Leisure who used online info):
Scotland 41 ⚠️; rest of UK 82; overseas 83

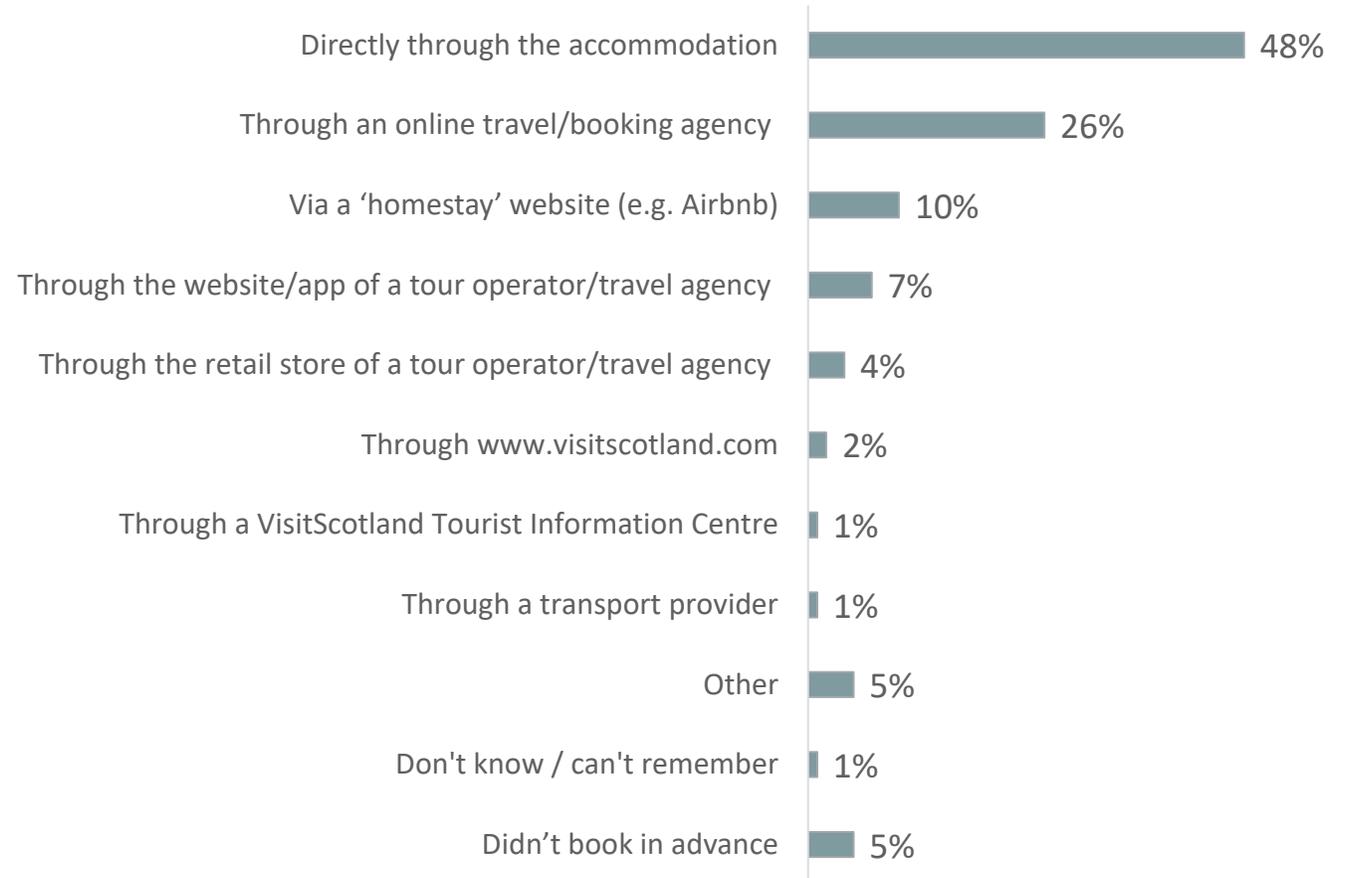
Q9: Which of the following types of online information did you use when planning your visit to Shetland?

Visitor journey

Booking

- All visitors who stayed in paid for accommodation were asked how they booked. Almost half reported that they booked directly with the accommodation provider, while a further 26% booked via a online travel/booking agency.
- Direct bookings with accommodation providers have remained consistent with 2017 (43%), however, there has been an increase in bookings via online travel/booking agencies (15% in 2017).
- The next most prevalent source of booking was 'homestay' websites such as Airbnb, mentioned by 10%. The proportion using this booking method has doubled since 2017 when 5% cited it.
- In 2019 only 5% of visitors did not book their accommodation in advance. This is a significant decline since 2017 when 20% didn't book before travel and perhaps indicates higher demand for accommodation on the islands.

Method of booking accommodation



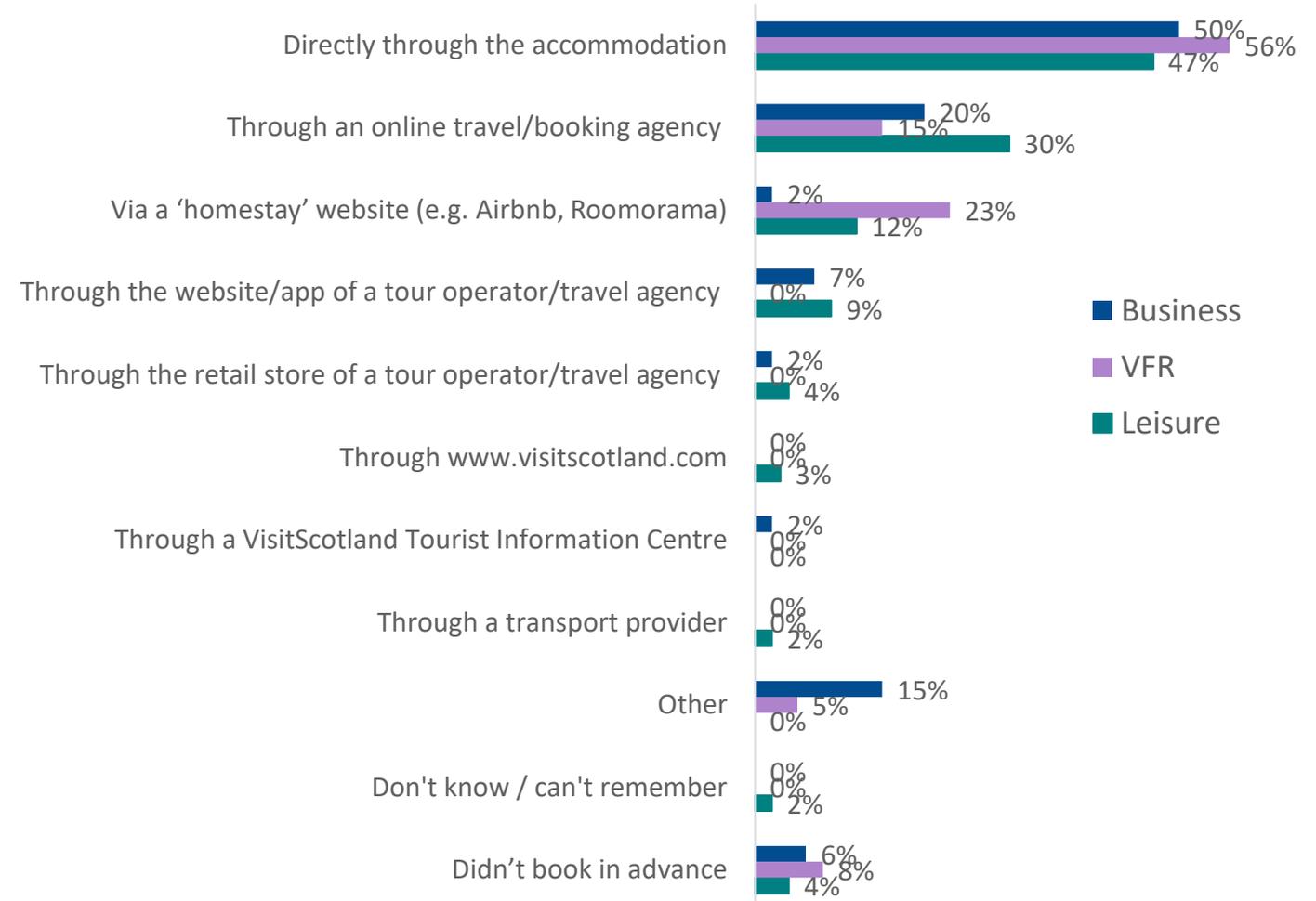
Base (All who stayed in paid accommodation): 335

Visitor journey

Booking

- Leisure, VFR and Business visitors were all most likely to have booked their accommodation directly with the provider. However, VFR visitors (23%) were more likely than Leisure (12%) or Business (2%) visitors to use 'homestay' accommodation.
- Leisure visitors tended to be the most likely to use online travel and booking agencies.
- A significant minority (15%) of Business visitors mentioned other methods of booking their accommodation. Most of these respondents cited booking through their employer's admin or travel department, or via an agent working for their employer.
- Amongst Leisure visitors, older visitors were more likely to have booked directly through their accommodation – half of those aged 45+ booked this way, which compared to 32% of those under 45. Younger age groups were more likely to use homestay providers (33% of under 45s) than those in older age groups (6% of over 55s).
- Within the Leisure sample a higher proportion of overseas visitors (40%) booked through an online travel agent than those from Scotland (21%) or the rest of the UK (25%). Those visiting from Europe (48%) were more likely to use an online travel agent than those visiting from North America (23%). Visitors from North America were more likely than average to book through the website/app of a tour operator (19%).

Method of booking accommodation - Visitors type



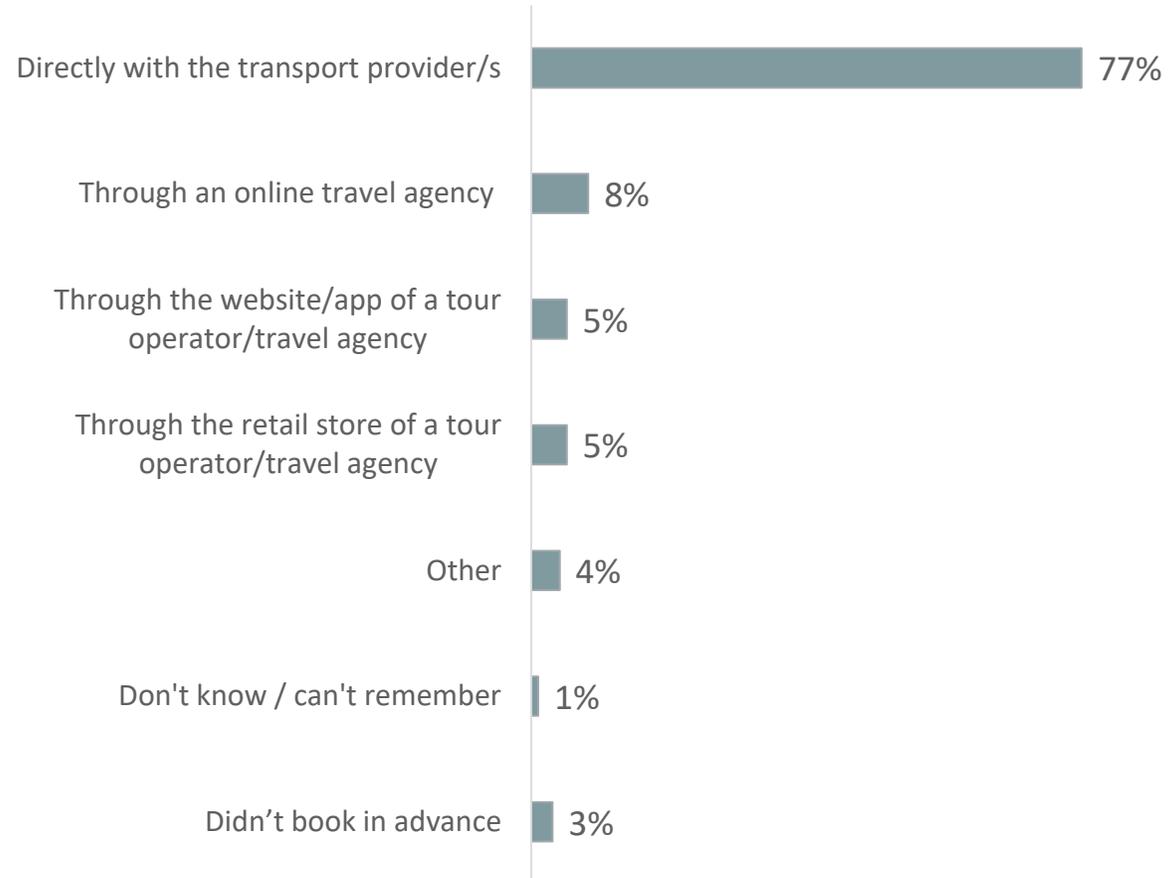
Base (all staying in paid accommodation) Leisure: 247, VFR: 25 ⚠️, Business: 57 ⚠️

Visitor journey

Booking

- Over three quarters of visitors reported that their transport to Shetland was booked directly with the transport provider, while just less than one in ten used an online travel agency.
- Direct bookings with transport providers were particularly high amongst VFR (86%) and Leisure visitors (81%). Business visitors were less likely to book directly (64%) although for this group it was still the primary transport booking method.
- A number of Business visitors mentioned other methods of booking their transport (10%) – similar to accommodation booking, this was typically via their employer or via an agent working on behalf of their employer.
- Booking directly with the transport provider was also the most popular way of booking transport in 2017, mentioned by 75% of respondents.

Method of booking transport



Visitor journey

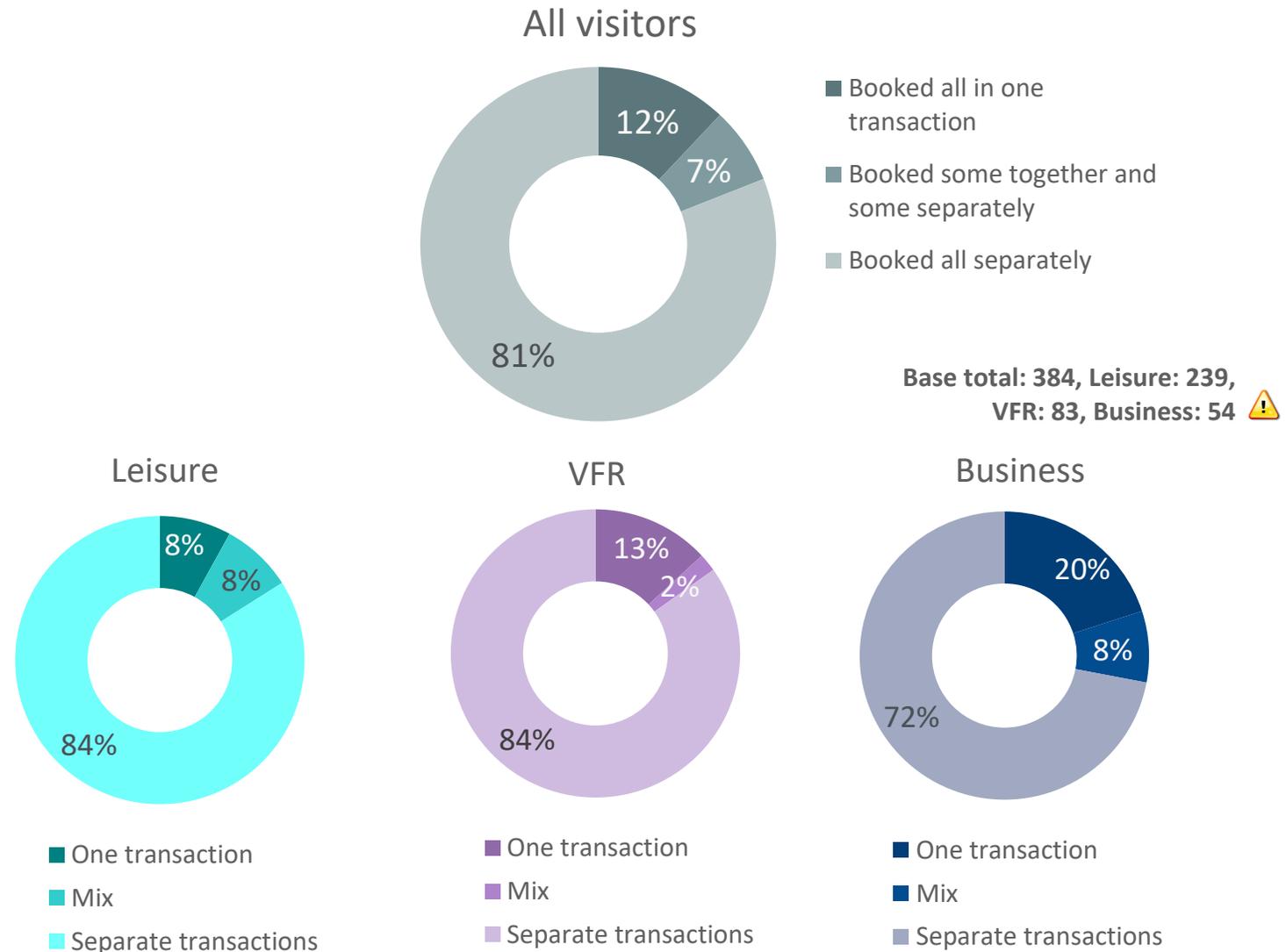
Booking

- Over one in ten visitors overall (12%) reported that they booked their accommodation and travel to Shetland together in one transaction, while the majority (81%) booked these separately.
- Independent travel was prevalent across all visitor types. Leisure visitors were the least likely to book their travel and accommodation in one transaction – 8%, compared to 13% of VFR visitors and 20% of Business visitors.
- Leisure visitors from North America were more likely to book a package (37%) than those from Scotland (11%), the rest of the UK (15%) or Europe (9%).

Q26: Did you book your travel and accommodation together in one transaction or separately in more than one transaction?



Did you book accommodation and travel in one transaction?

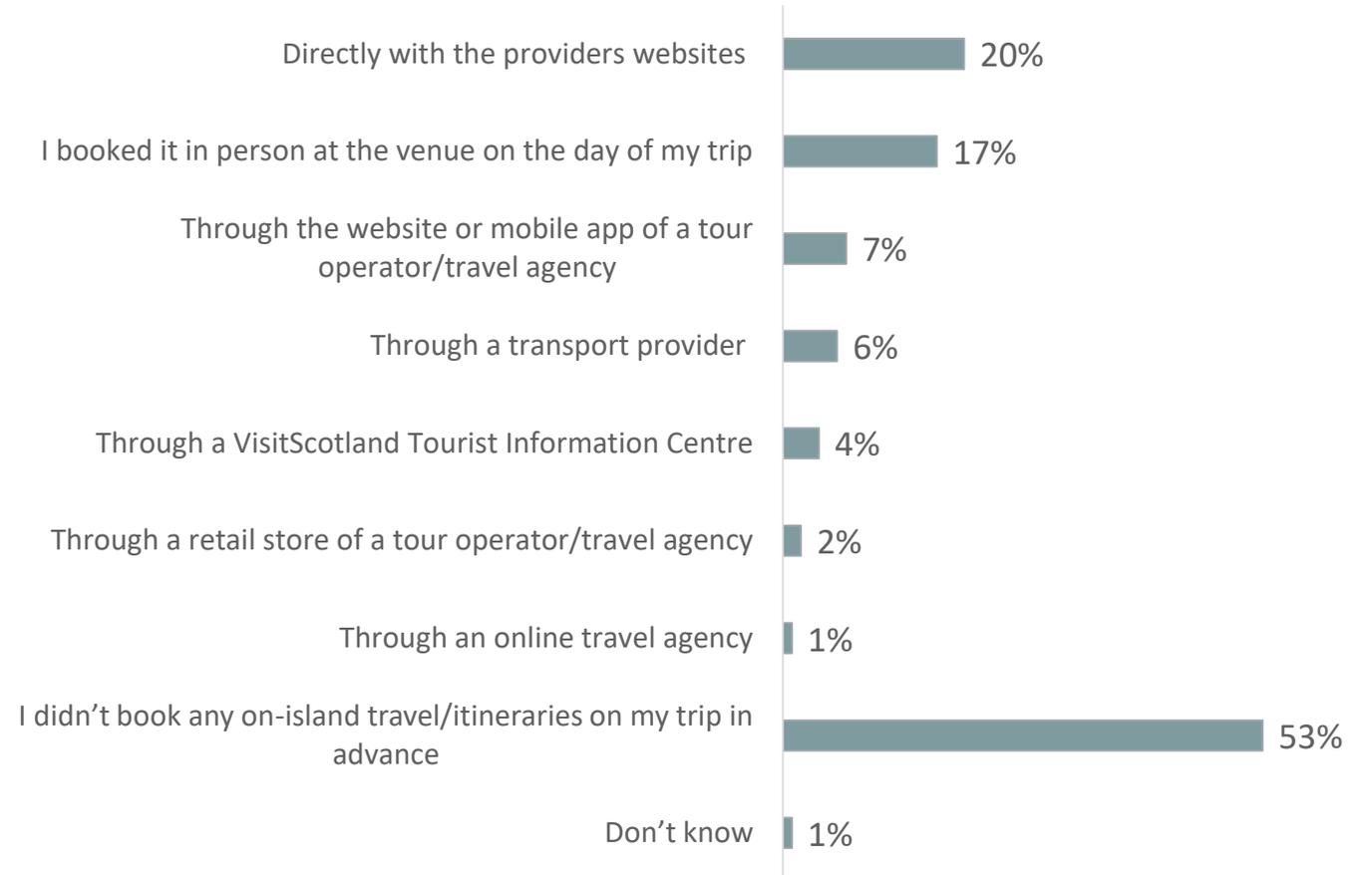


Visitor journey

Booking

- Approximately half of Leisure and VFR visitors reported that they booked activities or on-island travel. The most common way of doing this was directly on providers websites or in person at the venue on the day.
- Leisure visitors were more likely to book activities or on-islands transport (52%) than VFR visitors (29%).

Method of booking itinerary – Leisure and VFR visitors



Base (All Leisure and VFR visitors): 350

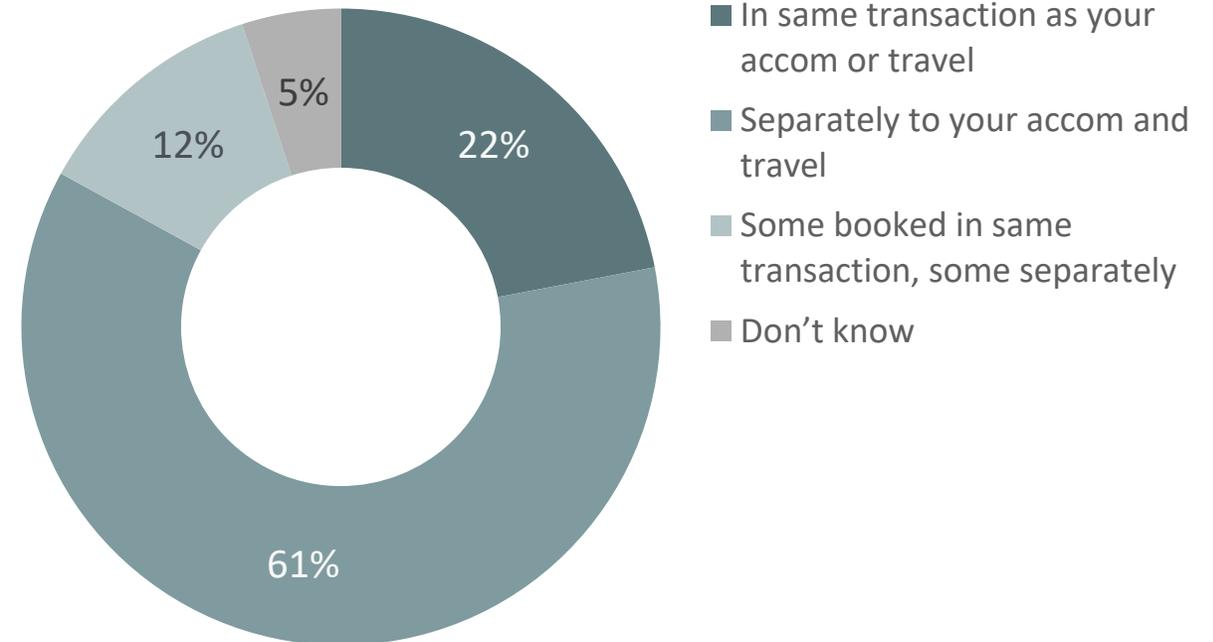
Visitor journey

Booking

- The majority of visitors who booked activities or on-island travel (61%) did this separately to their accommodation and travel bookings. This finding was consistent across Leisure (61%) and VFR (57%) visitors.
- A significant minority (22%), however, did book their itinerary in the same transaction as their accommodation or travel, or booked some of it in this way (12%).

Q28: And was your itinerary *within* Shetland booked ... ?

Was your itinerary booked ...? - Leisure and VFR visitors



Base (Leisure/VFR visitors who booked activities or on-islands travel): 123

Visitor journey

Summary



- The top reasons given for visiting Shetland for Leisure visitors were the scenery and landscape, the history/culture and it being a place visitors had always wanted to come to.
- Over half of Leisure visitors also reported that something they had seen or read had helped inspire their visit – TV programmes (38%), books (21%) and travel features in newspapers, guidebooks, etc. (18%) were the main sources of inspiration cited. The TV detective series and books ‘Shetland’ were particularly influential.
- Online was the key information source for Leisure visitors during the planning and booking process. Visitors tended to use a combination of websites and search engines, with Google (83%) and Shetland.org (72%) particularly popular. More than half of Leisure visitors who used online sources also mentioned transport provider websites (56%) and VisitScotland.com (52%).
- Official tourist websites (71%) and traveller submitted reviews/ratings (47%) were the most used types of online information amongst Leisure visitors.
- As with 2017, the majority of visitors in 2019 booked their transport and accommodation independently directly with providers, rather than booking packages or using agents.
- However, there has been an increase in booking accommodation using an online travel agent – from 15% in 2017 to 26% in 2019. Amongst Leisure visitors, 30% booking via an online travel agency.
- The proportion of ‘homestay’ accommodation bookings has doubled to 10% since 2017 (5%).



Trip profile

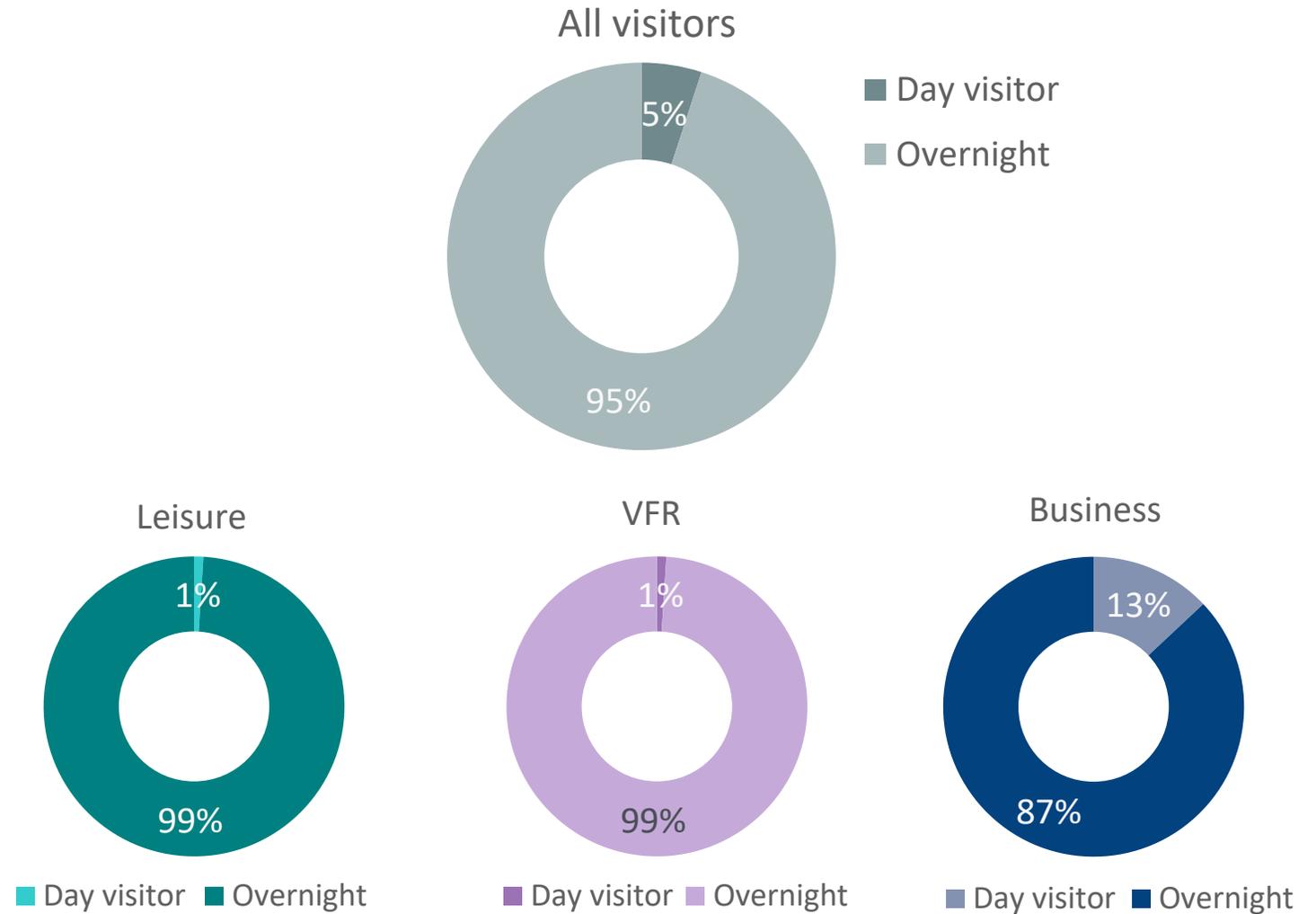
Trip Profile

Day vs overnight

- The vast majority of visitors to Shetland in 2019 were overnight visitors (95%). This proportion is consistent with 2017 when 93% of visitors were staying at least one night.
- VFR (99%) and Leisure (99%) visitors were more likely to stay for one or more nights than Business visitors (87%). Again, these proportions are consistent with 2017 data, when 14% of Business visitors were day visitors.



Day visitor or staying overnight



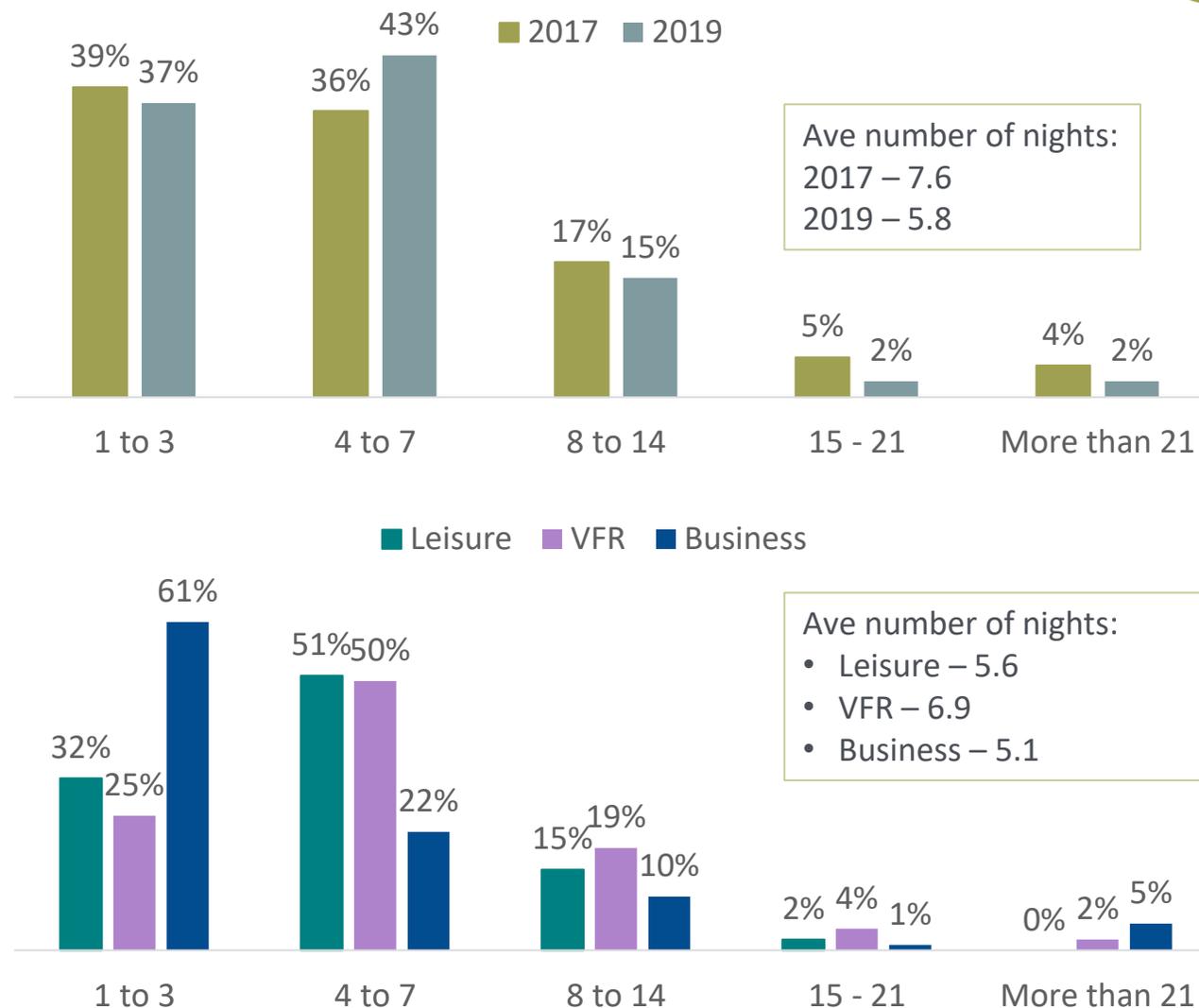
Base (All calibration visitors): 1,572, Leisure: 851, VFR: 308, Business: 382

Trip profile

Number of nights

- Consistent with 2017, the majority of overnight visitors to Shetland (81%) stayed for a period of one week or less. However the length of stay tended to be shorter in 2019 – 19% stayed for more than a week compared to 26% in 2017, and the overall average number of nights spent on Shetland was lower in 2019 (5.8) compared to 2017 (7.6).
- Half of Leisure visitors were staying 4 to 7 nights, while a further third were on a shorter break of 1 to 3 nights. The average number of nights was 5.6 nights.
 - Leisure visitors from the rest of the UK (56%) were more likely to stay for 4 to 7 nights than those from Scotland (47%) or overseas (48%).
- VFR visitors tended to stay longer, with 25% staying more than a week and an average number of nights of 6.9.
- Business visitors predominantly stay for 3 nights or less (61%).

Number of nights - Shetland



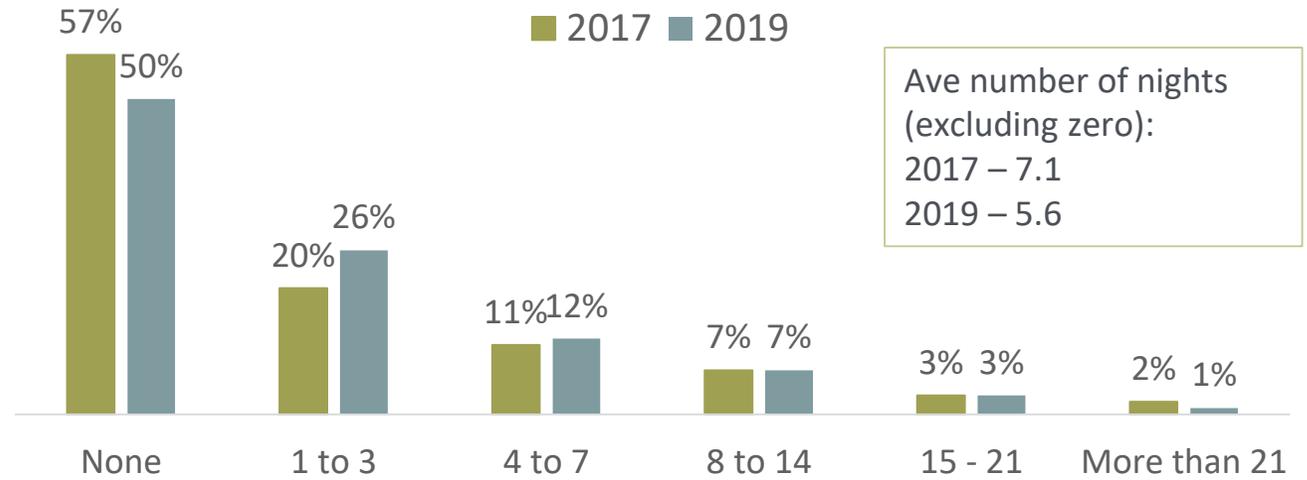
Base (All overnight calibration visitors): Total 1,495, Leisure 836; VFR 302; Business 328

Trip profile

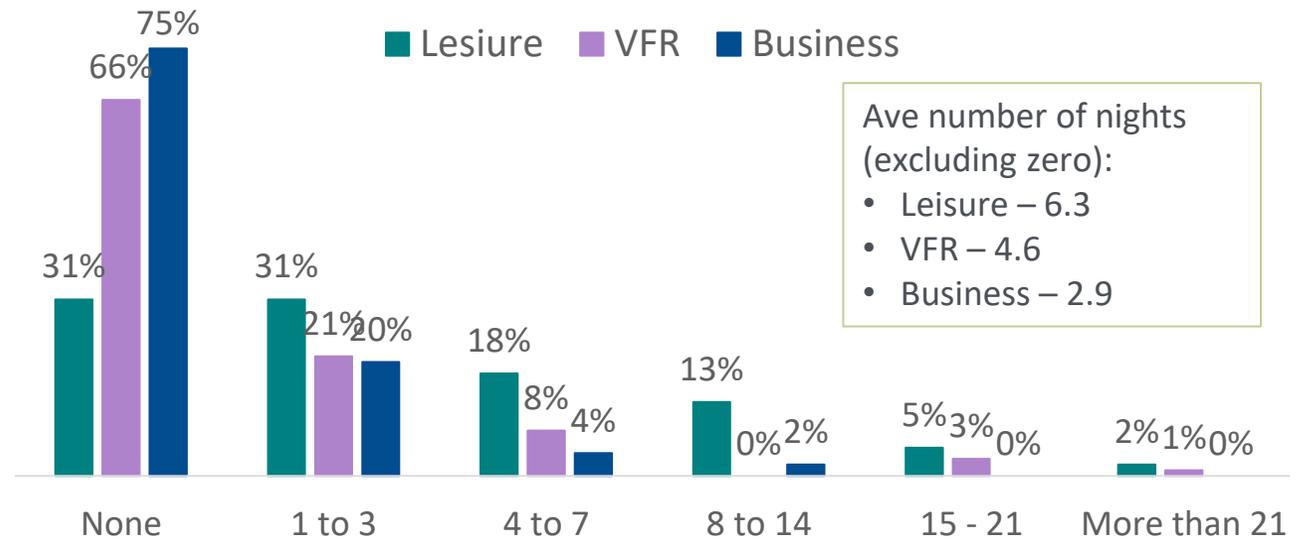
Number of nights

- Of those who stayed overnight on Shetland, half reported that they spent nights elsewhere in Scotland on their trip. This proportion was higher than in 2017 when 43% of visitors spent time on holiday in Scotland as well as Shetland.
- As we would expect, the proportion spending nights in other parts of Scotland was far higher for Leisure visitors (69%) than VFR (34%) or Business (25%) visitors.
- Of those who did spend some time in other parts of Scotland, the average number of additional nights was 6.3 nights for Leisure visitors and 4.6 nights for VFR visitors and 2.9 for Business visitors.

Number of nights - Scotland mainland



Ave number of nights (excluding zero):
 2017 – 7.1
 2019 – 5.6



Ave number of nights (excluding zero):

- Leisure – 6.3
- VFR – 4.6
- Business – 2.9

Base (All overnight visitors): Total 409; Leisure 256; VFR 86; Business 59

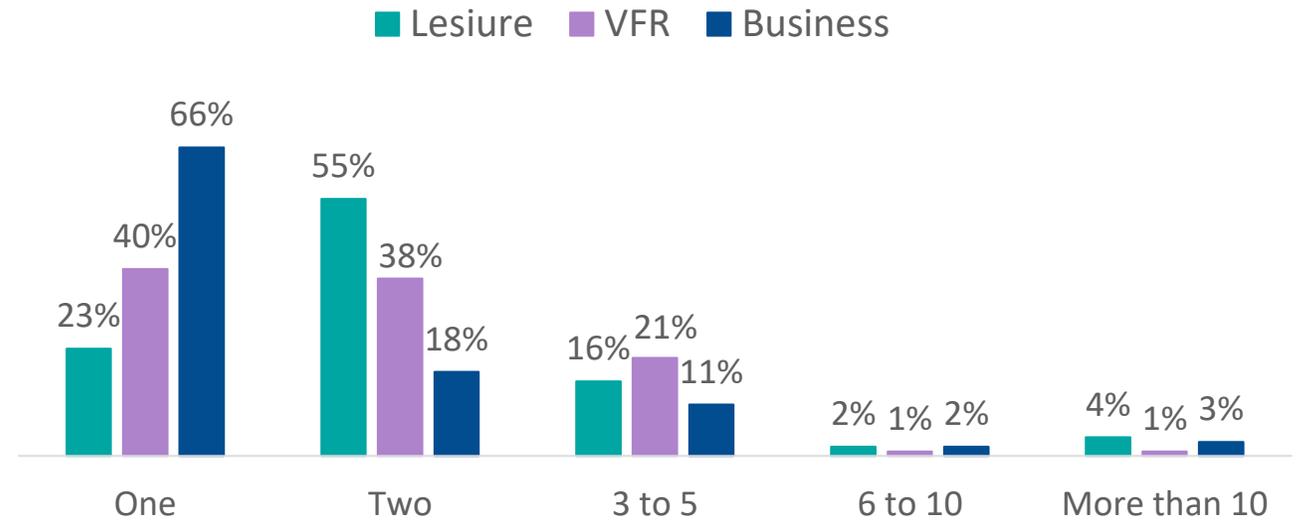
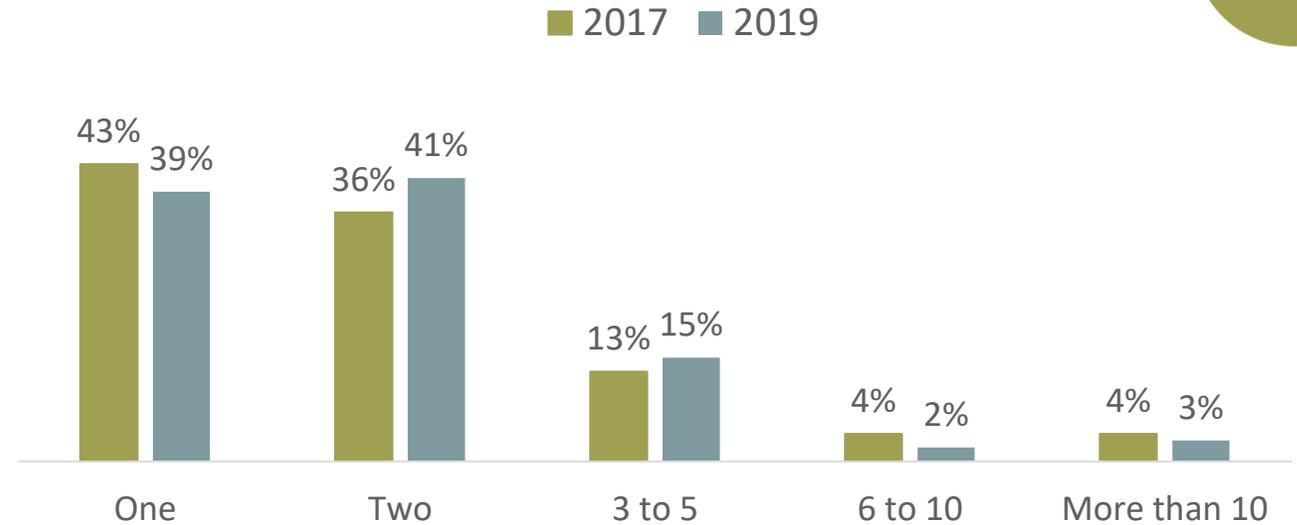
Q12: You previously indicated that you were on an overnight visit to Shetland. On your trip, how many nights did you spend away from home in the following locations? - Scotland

Trip profile

Party composition

- The majority of all visitors to Shetland (80%) reported that they were either visiting alone or with one other person.
- The overall proportion visiting alone or with one other person is similar to 2017 (79%), however, the overall proportion visiting alone was slightly lower in 2019 (39%) compared to 2017 (43%).
- Party size varied considerably by type of visitor. The majority of Business visitors (66%) were visiting alone, while Leisure visitors were more likely to be visiting with one other person (55%).
- VFR visitors were equally likely to visit alone (40%) or with one other person (38%), with 21% visiting in a group of 3 to 5 people.
- Leisure visitors who were travelling alone (23% of all Leisure visitors) were more likely to be in the under 45 year old age group (33%) than 45+ (20%). A higher proportion of European visitors were travelling along (29%) compared to those from other countries. They were equally likely to be male (25%) or female (21%).
- The group size by visitor type was very similar in 2019 to 2017, however, fewer VFR visitors were travelling alone in 2019 (40%) compared to 2017 (50%).

Number of people in party



Base (All calibration visitors): Total 1,572; Leisure 851; VFR 308; Business 382

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

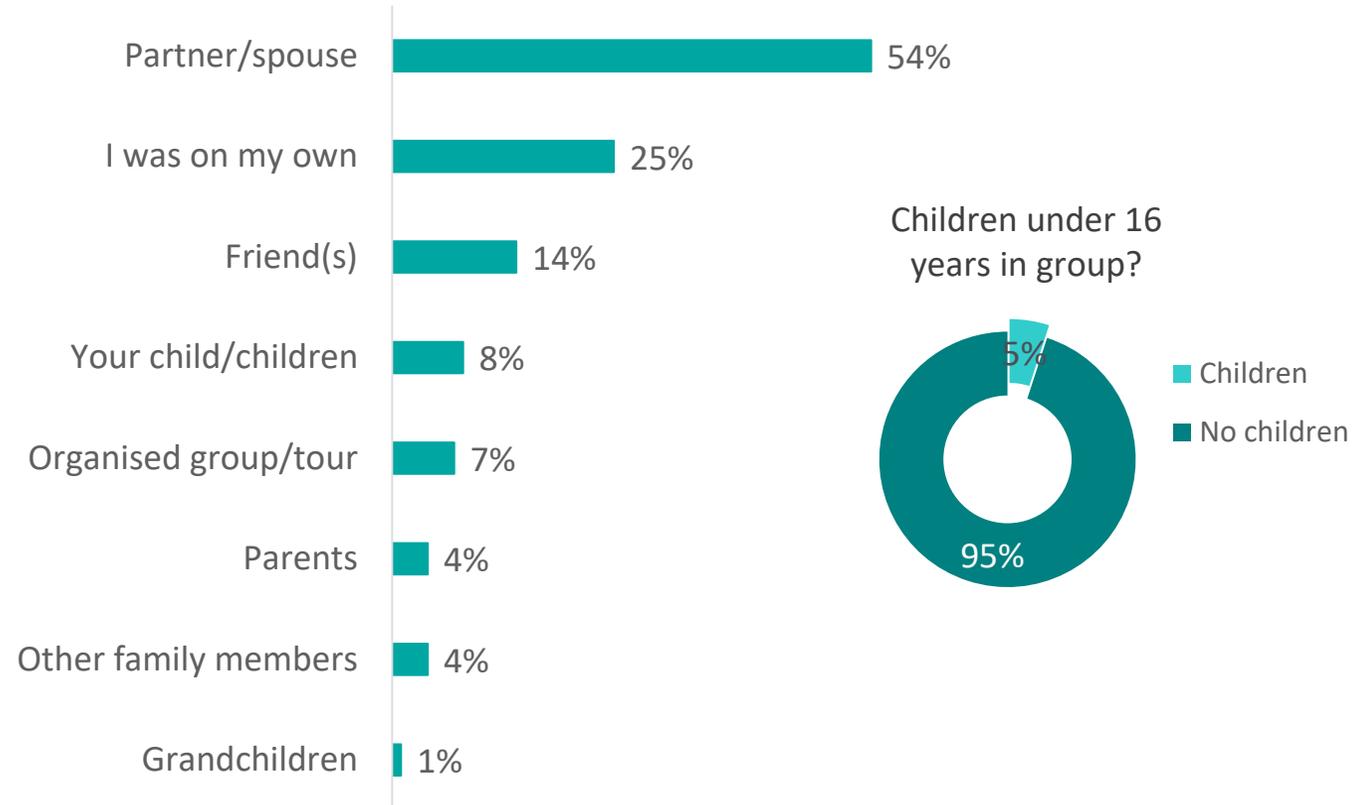
Trip profile

Party composition

- The largest proportion of Leisure visitors to Shetland in 2019 (54%) was travelling with their partner/spouse. It should be noted, however, that only 41% were only travelling as a couple, with others also mentioning others in their group, such as children or friends.
- In total, 20% of Leisure visitors reported that they were travelling with family members, including partners, children, parents and others. Similar to 2017 (7%), only a small minority (5%) had children under 16 years old in their group.
- One quarter of Leisure visitors reported that they were travelling alone*.
- These findings for party composition are very consistent with 2017 when 38% were travelling as a couple, one fifth were travelling with family members and 24% were travelling alone.

*There is a slight difference in the proportion stating 'on my own' here (25%) compared to stating alone for 'number of people in party' (23%). This is due to the number of people in party being taken from the calibration survey and party composition being asked in the online survey.

Party composition – Leisure visitors



Base (All leisure): 259

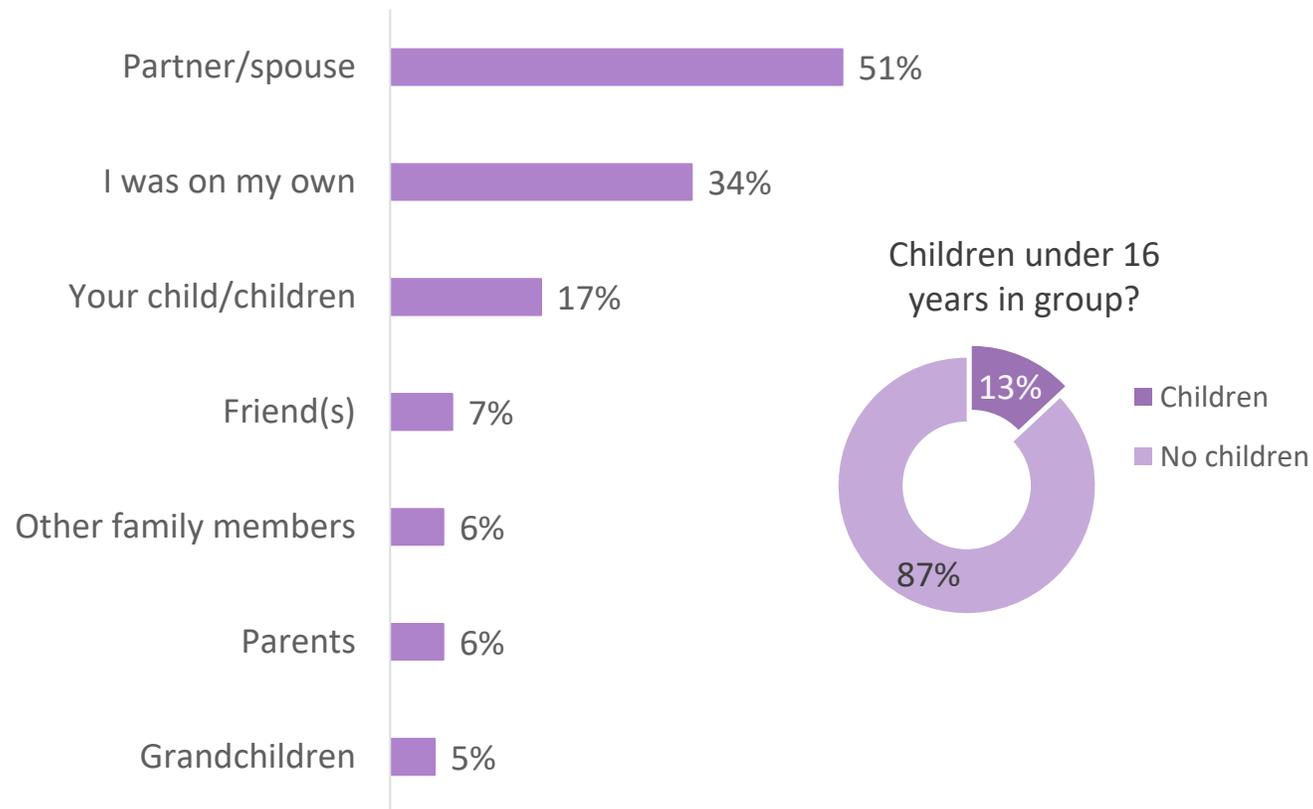
Trip profile

Party composition

- Amongst those travelling to Shetland to visit friends and relatives, a higher proportion were travelling alone* (34%) compared to Leisure visitors (25%).
- Half of VFR visitors reported that they were visiting with their partner/spouse, with 35% reporting no other people in their group (i.e. they were travelling as a couple).
- Just over one quarter of VFR visitors (26%) were visiting with family members, with 13% reporting having children under 16 years old in their group.

*There is a slight difference in the proportion stating 'on my own' here (34%) compared to stating alone for 'number of people in party' (40%). This is due to the number of people in party being taken from the calibration survey and party composition being asked in the online survey.

Party composition - Visiting friends and relatives



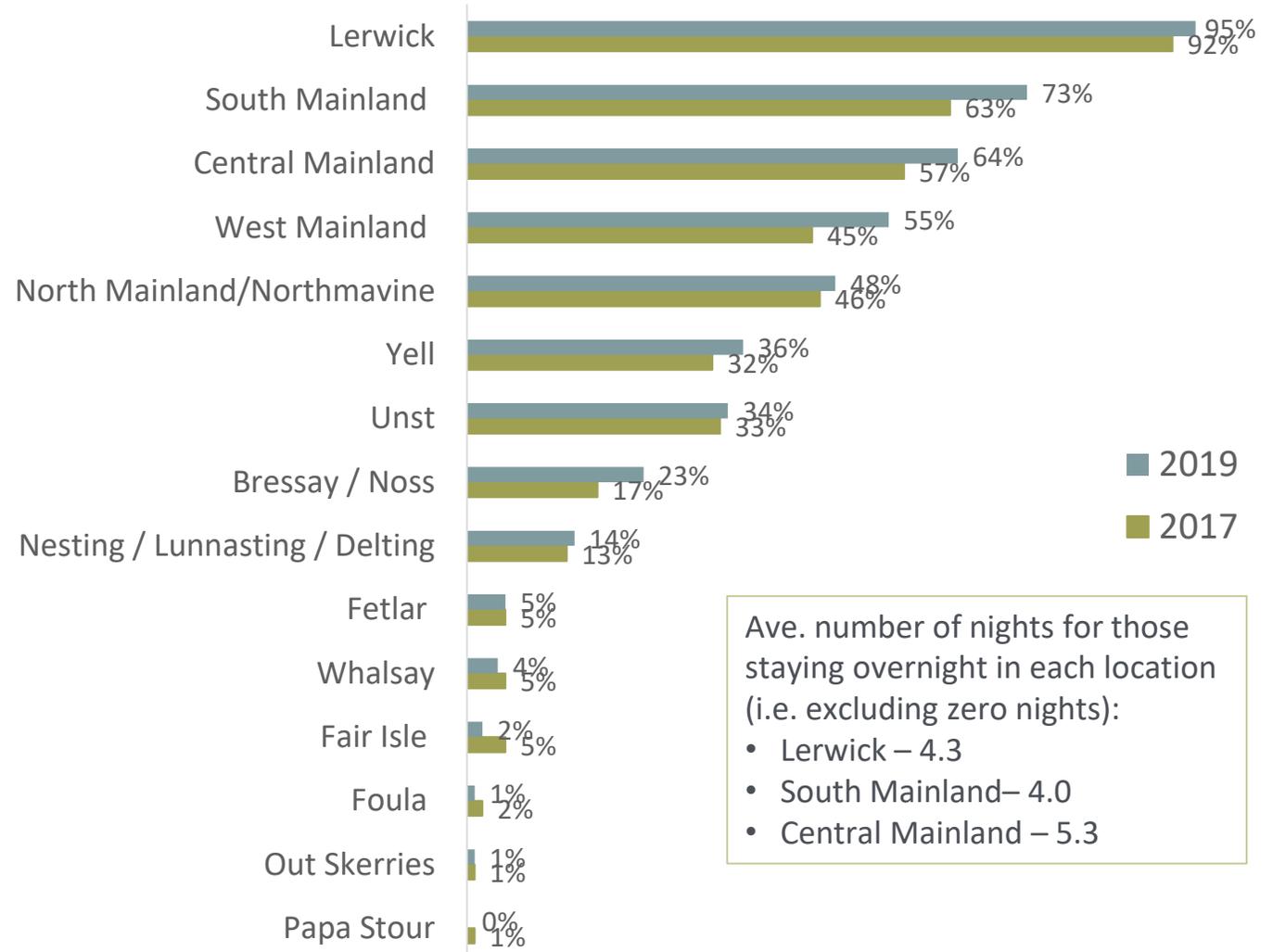
Base (All VFR): 89

Trip profile

Areas visited

- Almost all visitors to Shetland reported that they visited Lerwick during their trip. The majority also mentioned visiting South Mainland (73%) and Central Mainland (64%).
- Approximately half of visitors visited West Mainland (55%) and North Mainland/Northmavine (48%), while one third reported that they had visited Yell or Unst during their trip to the Shetland Islands.
- Compared to 2017, the pattern of response was very similar, however, higher proportions of visitors reported going to some locations in 2019, including South Mainland, West Mainland and Bressay/Noss.
- 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 over.

Areas of Shetland visited - All visitors



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

- Lerwick – 4.3
- South Mainland– 4.0
- Central Mainland – 5.3

Base (All): 2019: 424, 2017: 1,330

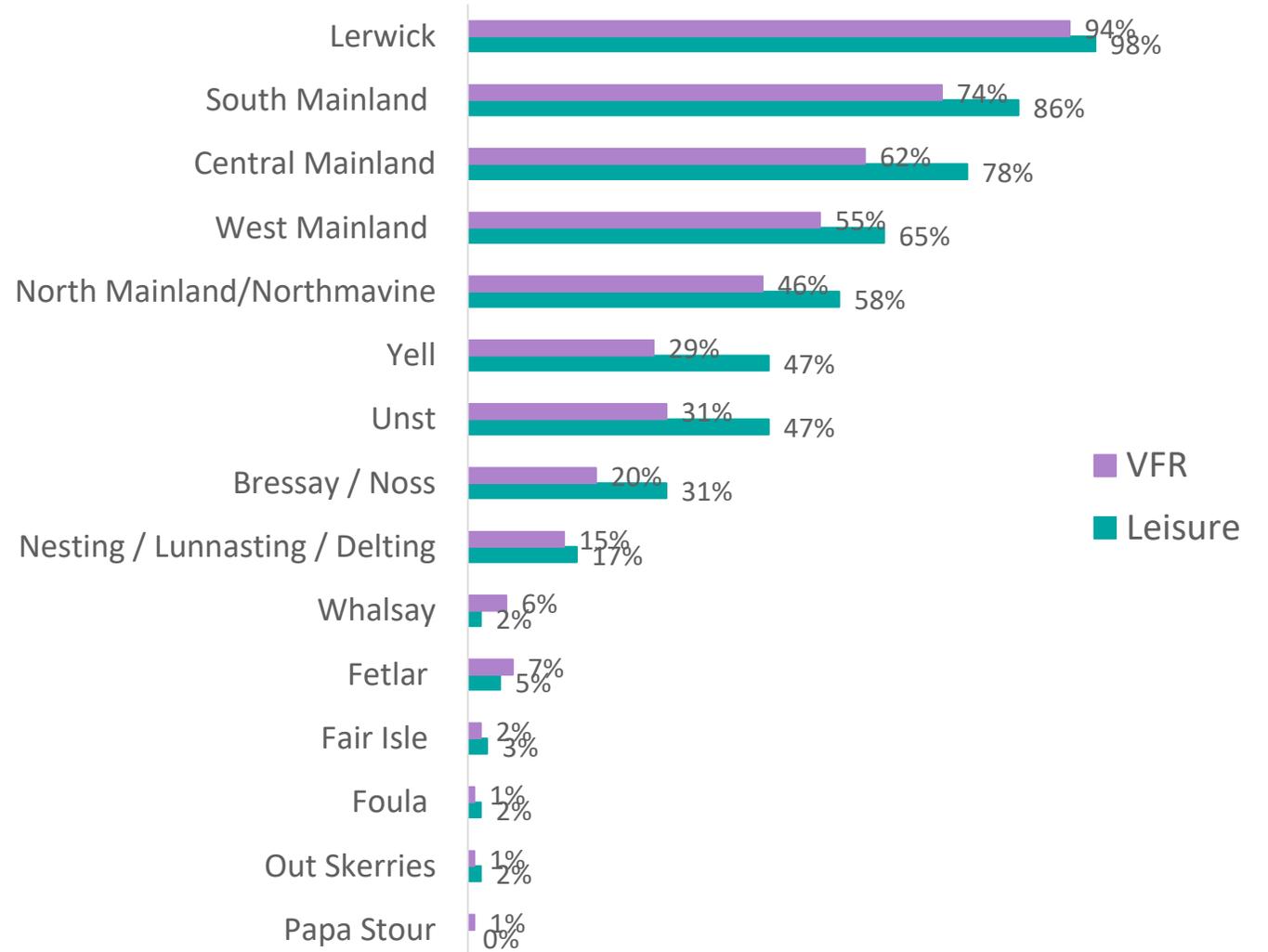
Q13: Which of the following areas of Shetland did you visit during your trip?

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 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.

Areas of Shetland visited - Leisure and VFR visitors



Base (All Leisure / VFR): Leisure 259; VFR 89

Q13: Which of the following areas of Shetland did you visit during your trip?

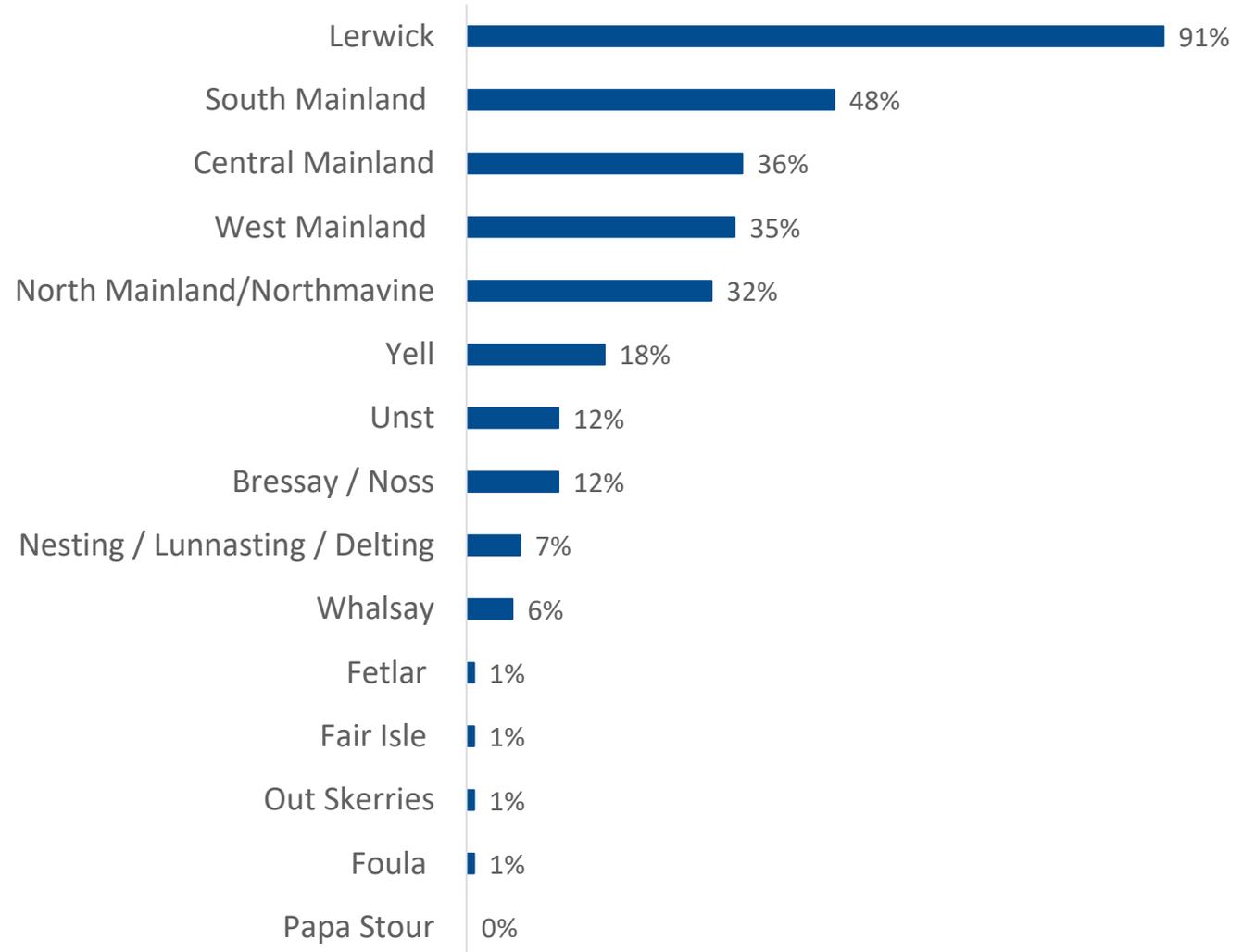
Trip profile

Areas visited

- As we would expect, Business visitors tend to focus on one or two locations, rather than visiting multiple locations across Shetland.
- Almost all Business visitors (91%) reported going to Lerwick, while 48% also visited South Mainland and around one third went to other parts of the mainland.



Areas of Shetland visited - Business visitors



Base (All Business): 68

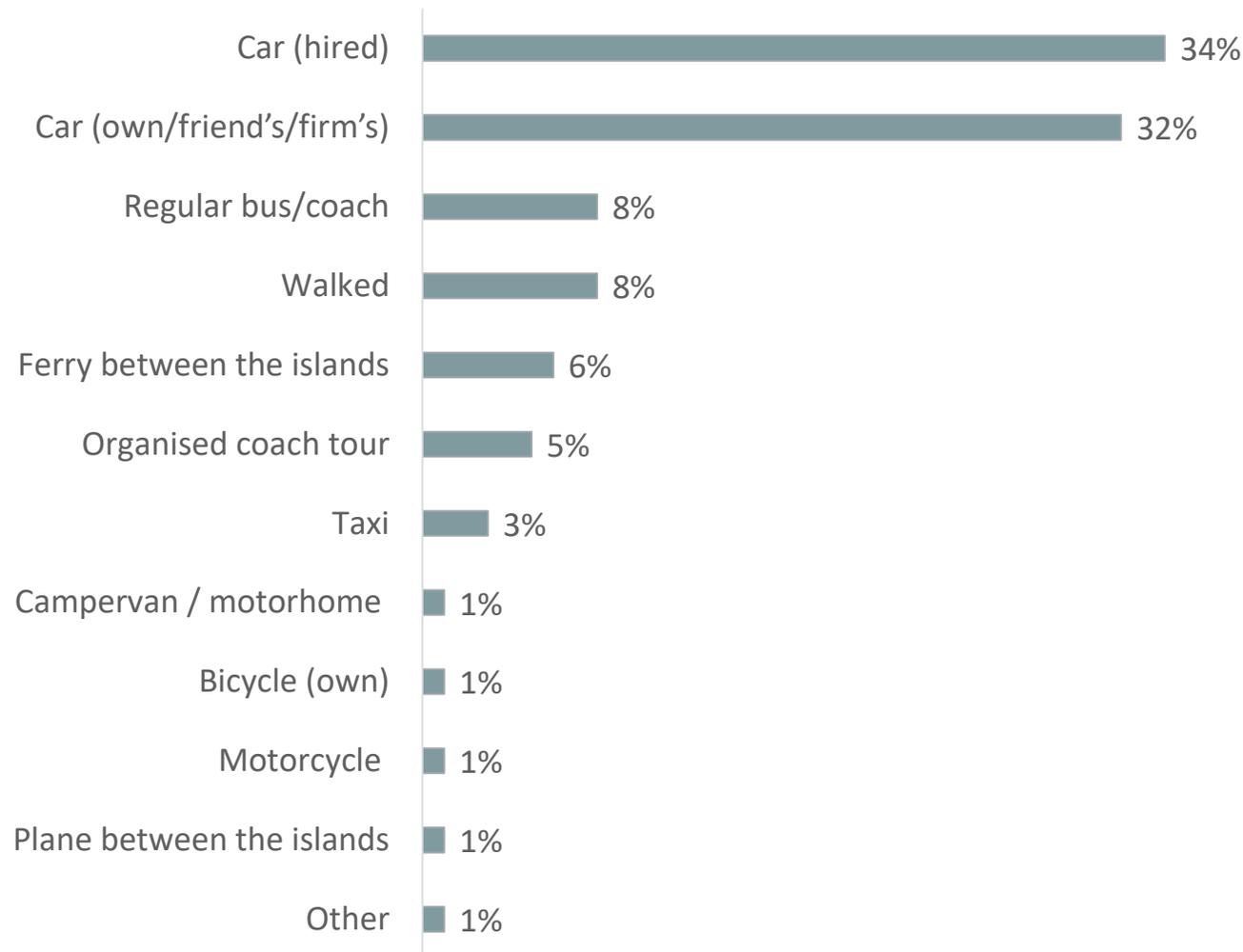
Q13: Which of the following areas of Shetland did you visit during your trip?

Trip profile

Transport

- The largest proportion of visitors (66%) reported that they had travelled by car during their visit – 32% using their own car and 34% using a hired car.
- Other forms of transport were used by far smaller proportions of visitors. These included buses (8%), walking (8%), ferries (6%) and coach tours (5%).
- The methods of transport used during the trip to Shetland in 2019 are very similar to those mentioned in 2017, when 70% travelled by car (39% hired car; 31% own car).
- Using a privately owned car was more frequently mentioned by VFR visitors (59%) than Leisure (16%) or Business (41%) visitors. Hire cars were more frequently mentioned by Leisure visitors (39%) and Business visitors (39%) than VFR visitors (18%).

Main type of transport during visit



Base (All, excluding rotational shift workers): 407

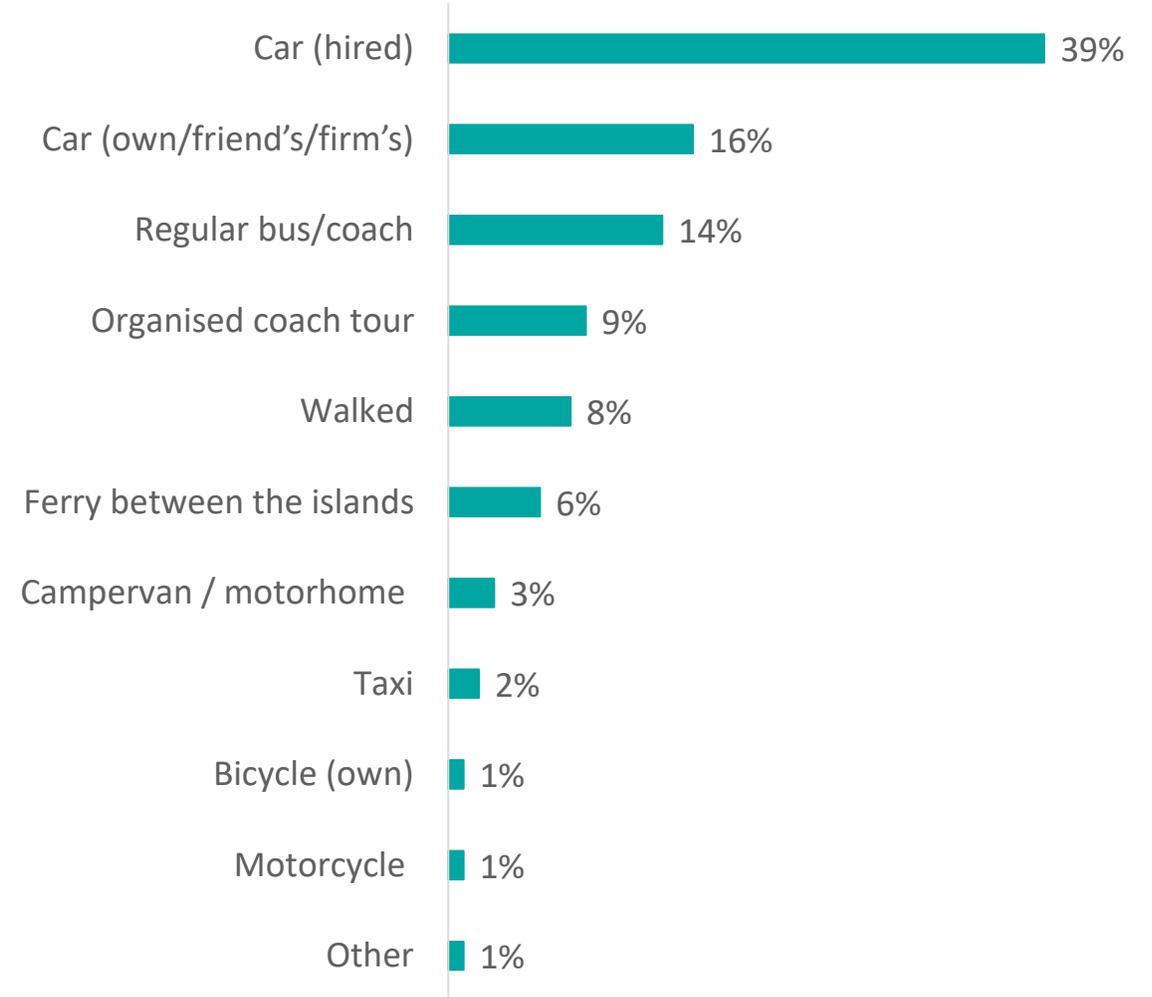
Q20: What was the main type of transport you used during your visit to Shetland, i.e. whilst on the island/s?

Trip profile

Transport

- Cars were the most often used transport for Leisure visitors, mentioned by 55% in total. Hired cars (39%) were more frequently mentioned than privately owned cars (16%).
- The methods of transport used by Leisure visitors in 2019 were very similar to those used in 2017, however there has been a decrease in those travelling in a privately owned car (26% in 2017), although there has not been a corresponding increase in usage of hired cars (36% in 2017). Instead there have been small increases across a range of transport options such as bus (9% in 2017) and ferries (4% in 2017).
- Leisure visitors from Scotland (35%) were more likely to use their own car than those from the rest of the UK (16%) or overseas (6%).
- Half of overseas visitors reported using a hire car.

Main type of transport during visit – Leisure visitors



Q20: What was the main type of transport you used during your visit to Shetland, i.e. whilst on the island/s?

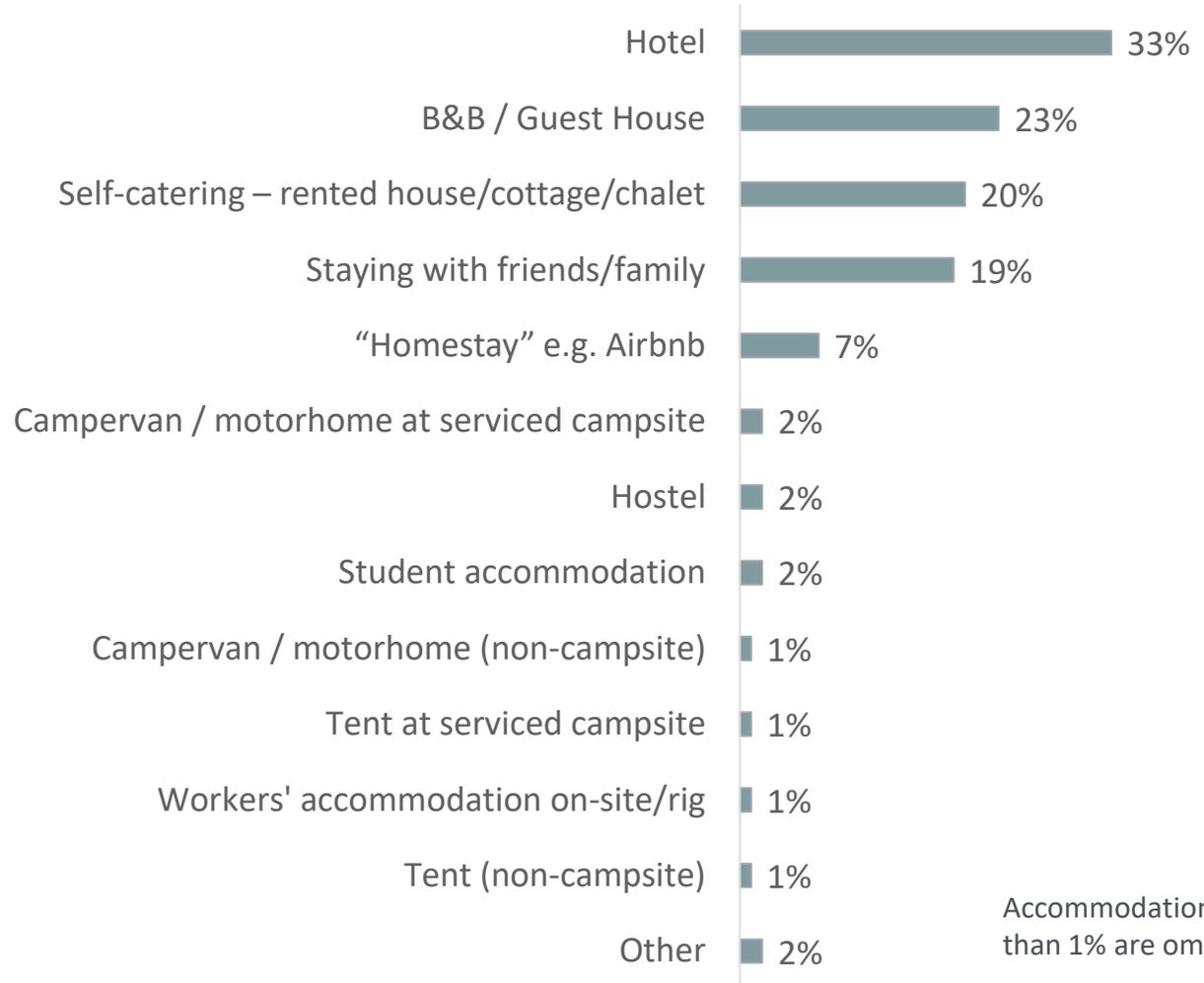
Base (All Leisure): 259

Trip profile

Accommodation

- Hotels (33%) was the most often cited type of accommodation for overnight visitors, followed by B&Bs (23%) and self catering (20%). These three accommodation types were also the most popular in 2017, with 34% staying in a hotel, 20% in a B&B and 19% in self-catering accommodation.
- Since 2017 there has been a decrease in those staying in a hostel (6% in 2017 to 2% in 2019). Although still small, over the past two years there has been an increase in the proportion of visitors staying in 'homestay' accommodation (4% in 2017 to 7% in 2019).
- Hotels were particularly prevalent amongst Business visitors (56%), compared to Leisure (35%) and VFR (2%) visitors.
- Self-catering accommodation was more common amongst Leisure visitors (26%), compared to VFR (13%) and Business (13%) 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 omitted from the chart.

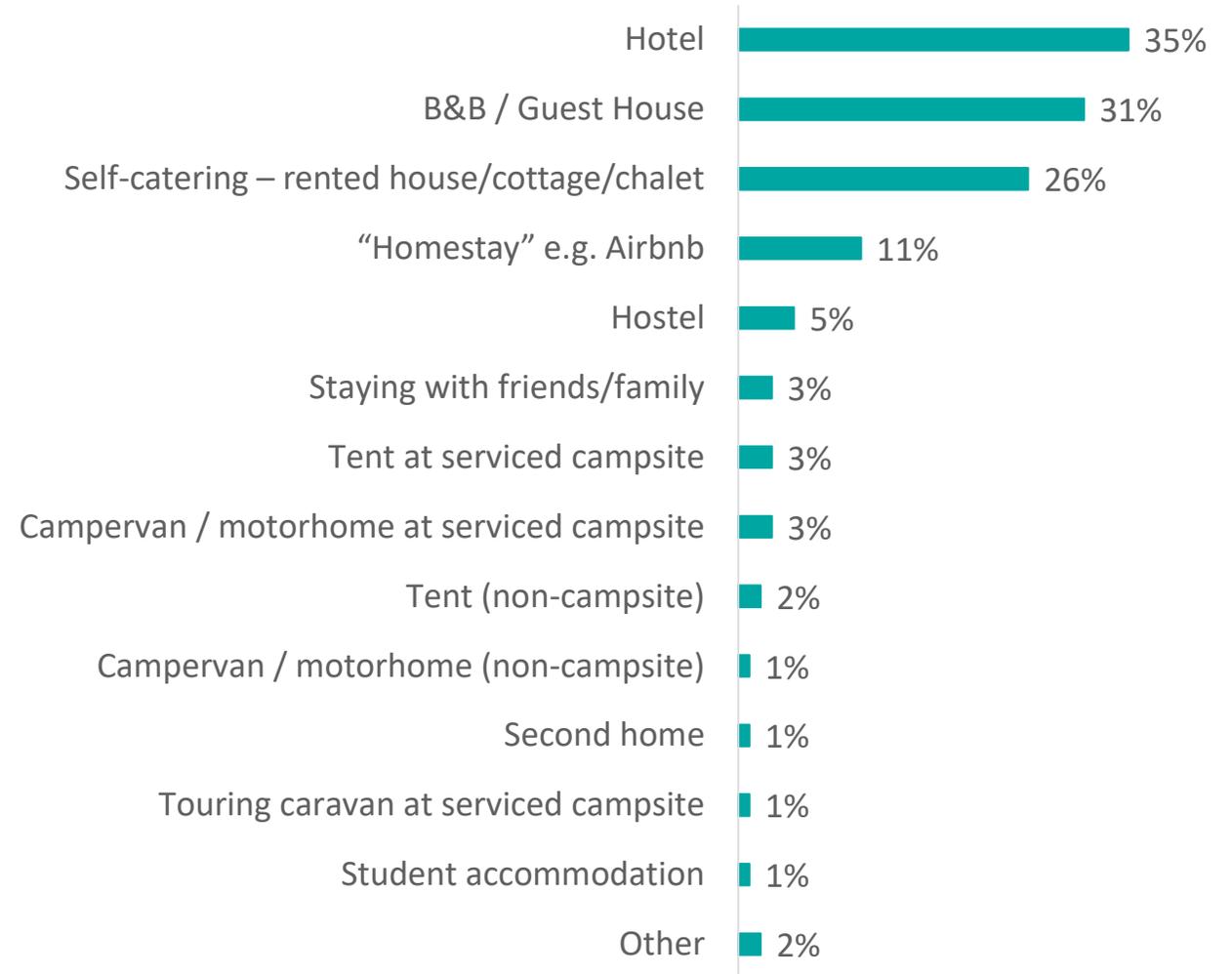
Base (All overnight visitors): 413

Trip profile

Accommodation

- More than one third (35%) of Leisure visitors stayed in a hotel during their visit to Shetland, while 31% stayed in a B&B and 26% opted for self-catering accommodation. The proportion staying in hotels has increased since 2017 (when 26% stayed in a hotel) meaning that it is now a more popular accommodation choice than B&Bs which topped the list last wave.
- There has also been an increase in Leisure visitors staying in 'homestay' accommodation (11%) compared to 2017 (6%). The proportion reporting that they stayed with friends and family has decreased in 2019 (3%) compared to 2017 (17%). This may be due to more Airbnb options being available on the islands and the increased popularity of hotels.
- Leisure visitors from overseas (18%) were less likely to stay in a self-catering accommodation than those from Scotland (29%) or the rest of the UK (33%).
- Younger respondents aged under 45 years old were more likely than average to stay in a hostel (14%). Homestay accommodation was also more often mentioned by younger age groups (25% of under 45s) than older age groups (6% of over 55s).

Accommodation stayed in during visit – Overnight Leisure visitors



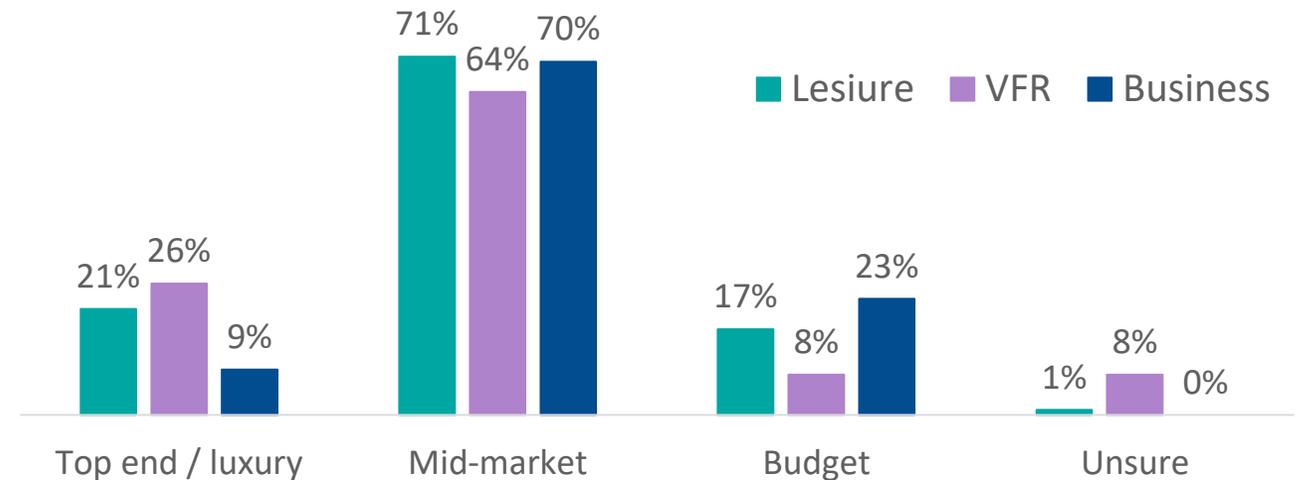
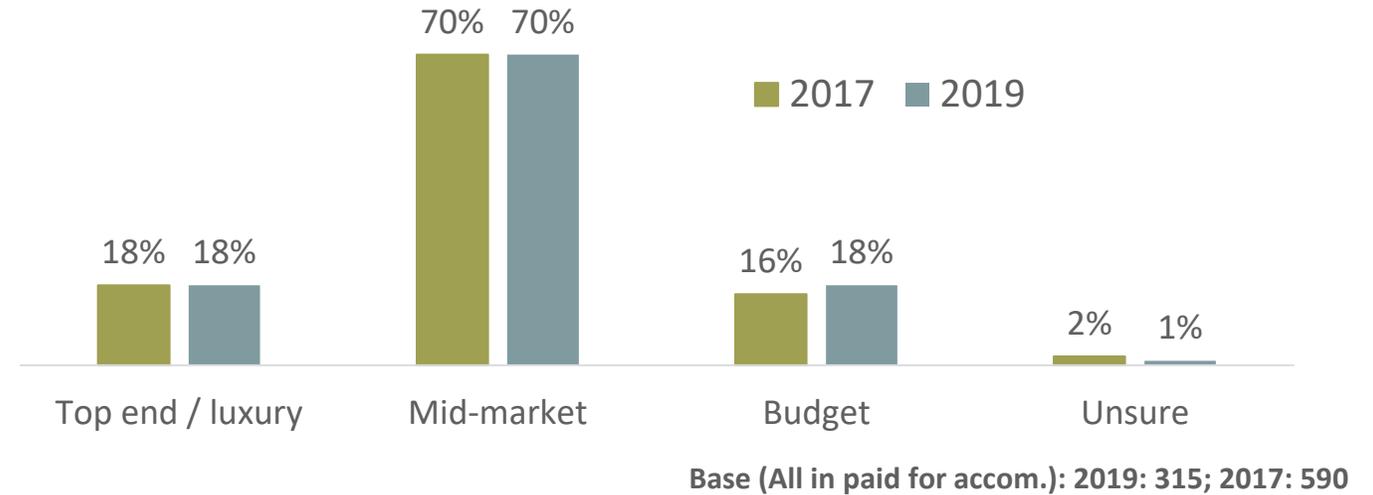
Base (All overnight Leisure visitors): 257

Trip profile

Accommodation

- The majority of visitors to Shetland who were staying in paid for accommodation (70%) described their accommodation as 'mid-market'.
- Of the remainder, there was an even split between those staying in luxury (18%) and budget (18%) accommodation.
- These proportions were consistent with the data collected in 2017.
- VFR and Leisure visitors were the most likely to describe their accommodation as 'top end' (26% and 21% respectively).
- Leisure visitors aged under 45 years old were more likely to describe their accommodation as 'budget' (42%) than those in older age groups (9% of over 55s).

Type of accommodation – Overnight in paid for accommodation

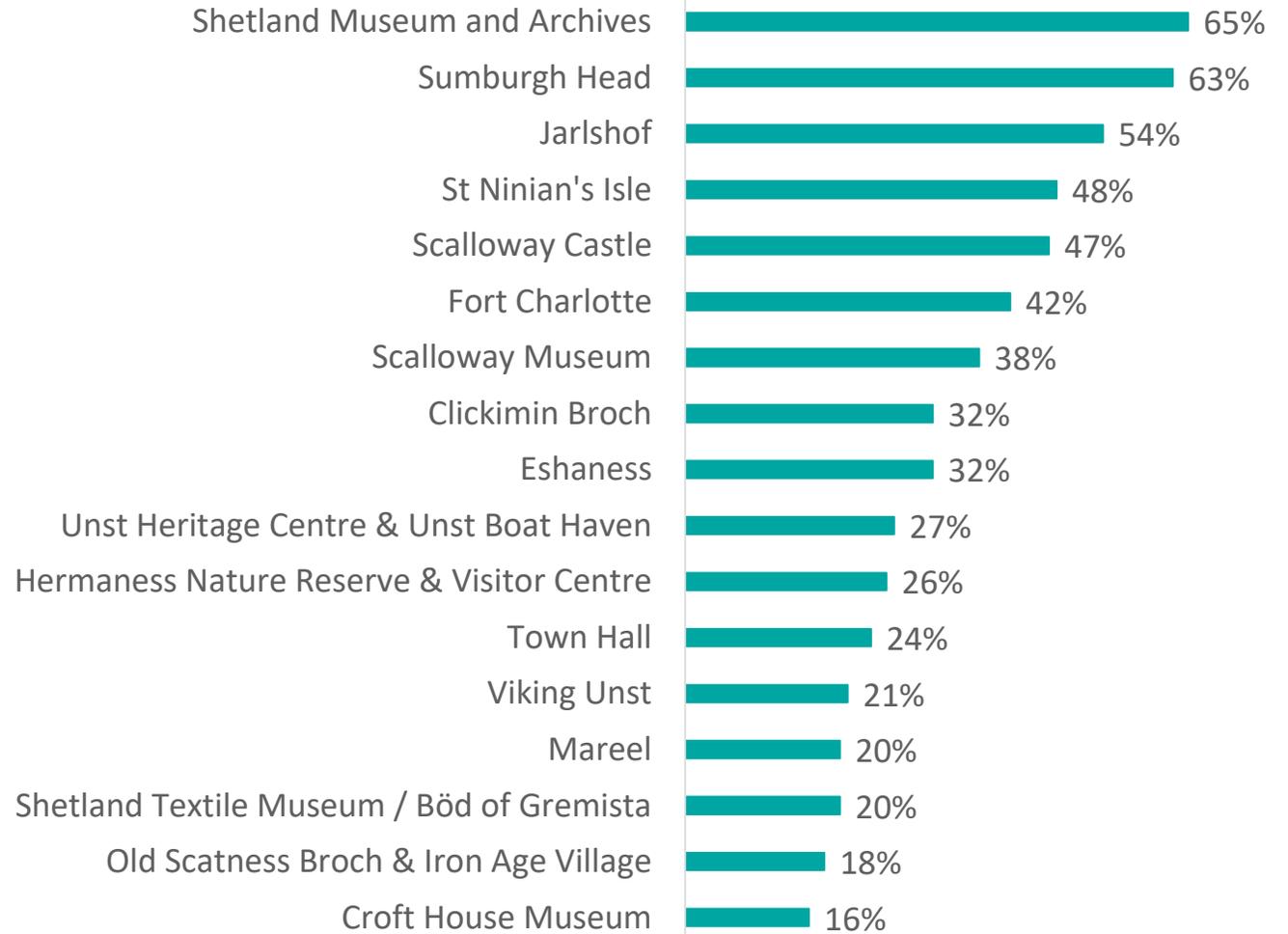


Trip profile

Attractions visited

- Leisure visitors were asked to name the attractions they visited during their trip. The data opposite shows the proportions of all Leisure visitors to Shetland who visited the most popular sites and attractions in 2019.
- Leisure visitors tended to visit a variety of attractions, with the most popular in 2019 being the Shetland Museum and Archives, Sumburgh Head, Jarlshof, St Ninian's Isle and Scalloway Castle.
- Overseas visitors were more likely than those from the UK to visit Fort Charlotte (51%), the town hall (32%) and the Croft House Museum (23%).

Top visitor attractions on Shetland - Leisure visitors



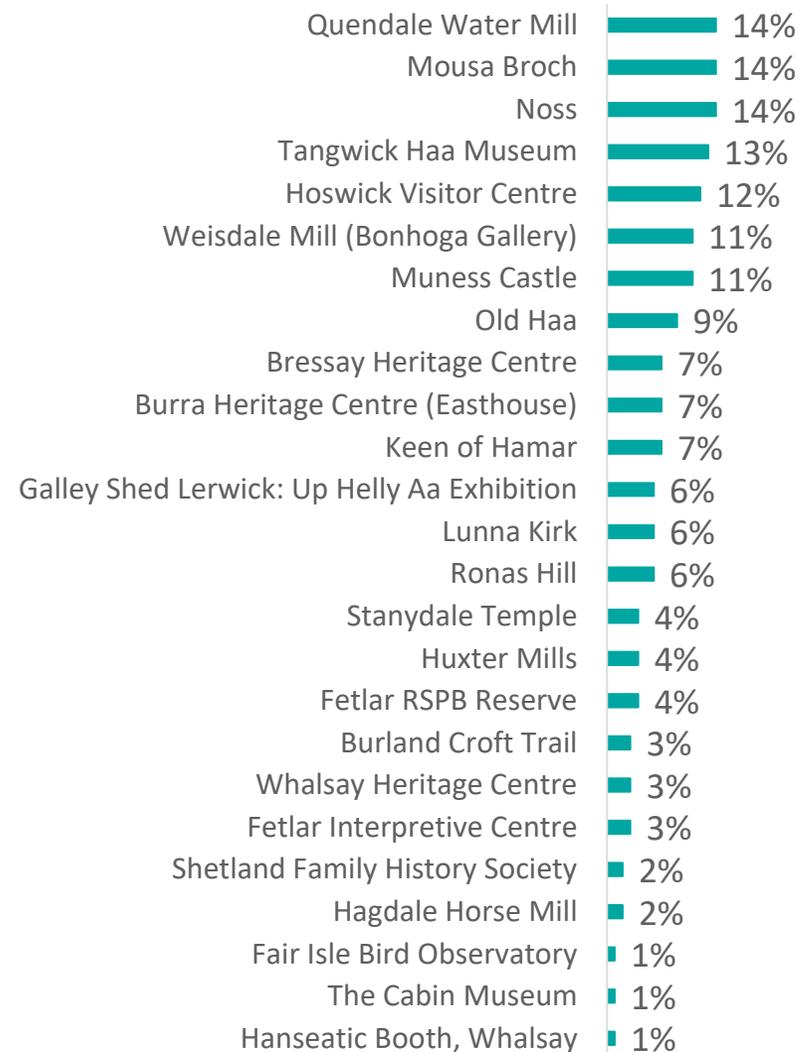
Base (All Leisure): 259

Trip profile

Attractions visited

- The data here shows the proportions of all Leisure visitors who visited some of the less visited attractions in 2019.
- 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 in some of the more remote islands.

Less visited attractions on Shetland - Leisure visitors



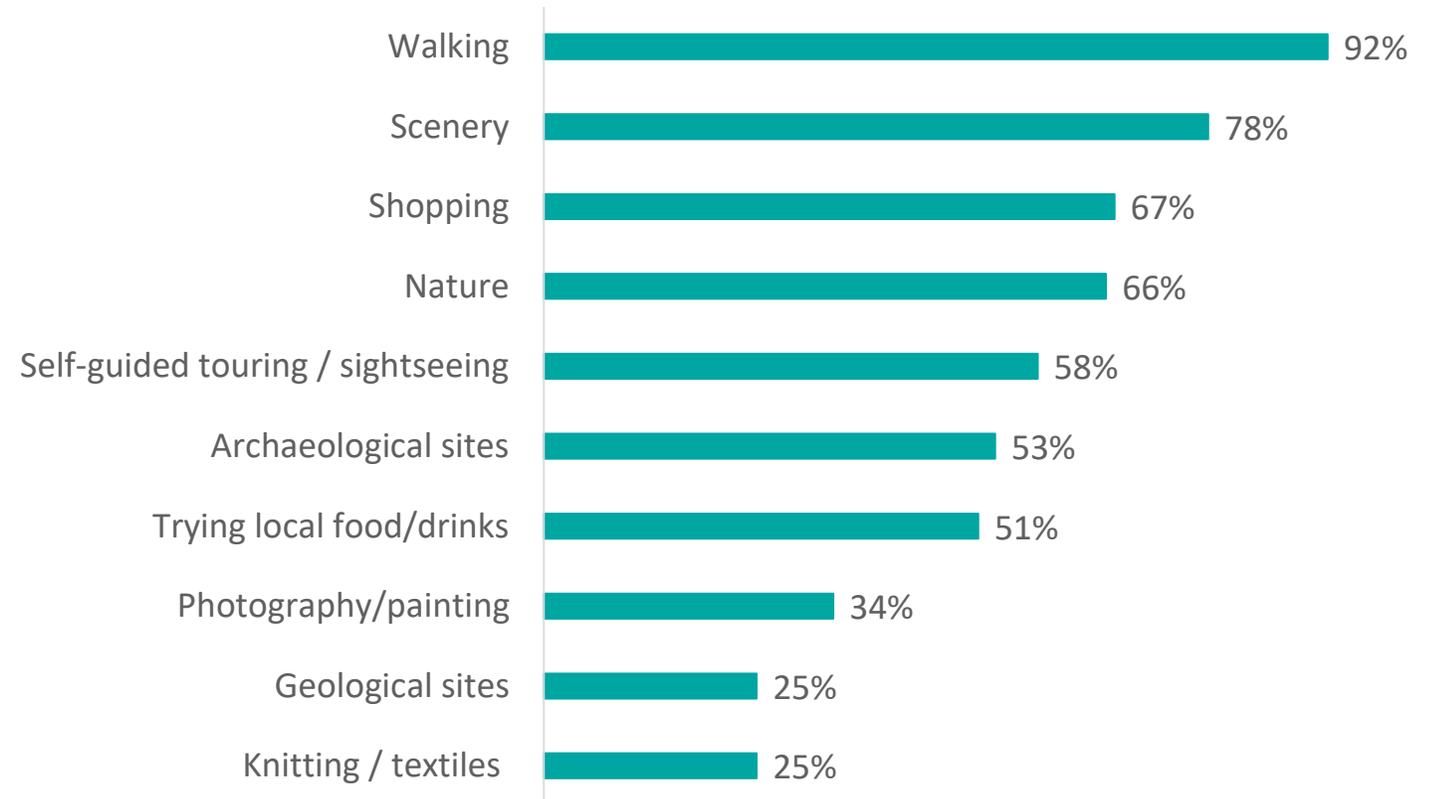
Base (All Leisure): 259

Trip profile

Activities

- Respondents were also asked what activities they participated in during their trip to Shetland. The data shown here combines the figures from the chart over to show grouped activities, such as walking (including long and short walks), scenery (beaches, viewpoints, etc.) and shopping (local crafts and other).
- The majority took part in a variety of activities including walking (92%), enjoying scenery (78%), shopping (67%) and observing and experiencing nature (66%).
- The proportions participating in many of these activities was higher than 2017. For example, in 2019 there were found to be increases in those mentioning walking (87% in 2017), scenery (70%), shopping (55%), self-guided touring/sightseeing (46%) and archaeological sites (37%).
- Visitors from the rest of the UK (72%) and overseas (70%) were more likely to mention nature activities than those from Scotland (45%). Bird watching was particularly popular for visitors from the rest of the UK (67%).

Top activities on Shetland - Leisure visitors



Q45: Did you take part in any of the following activities during your visit to Shetland?

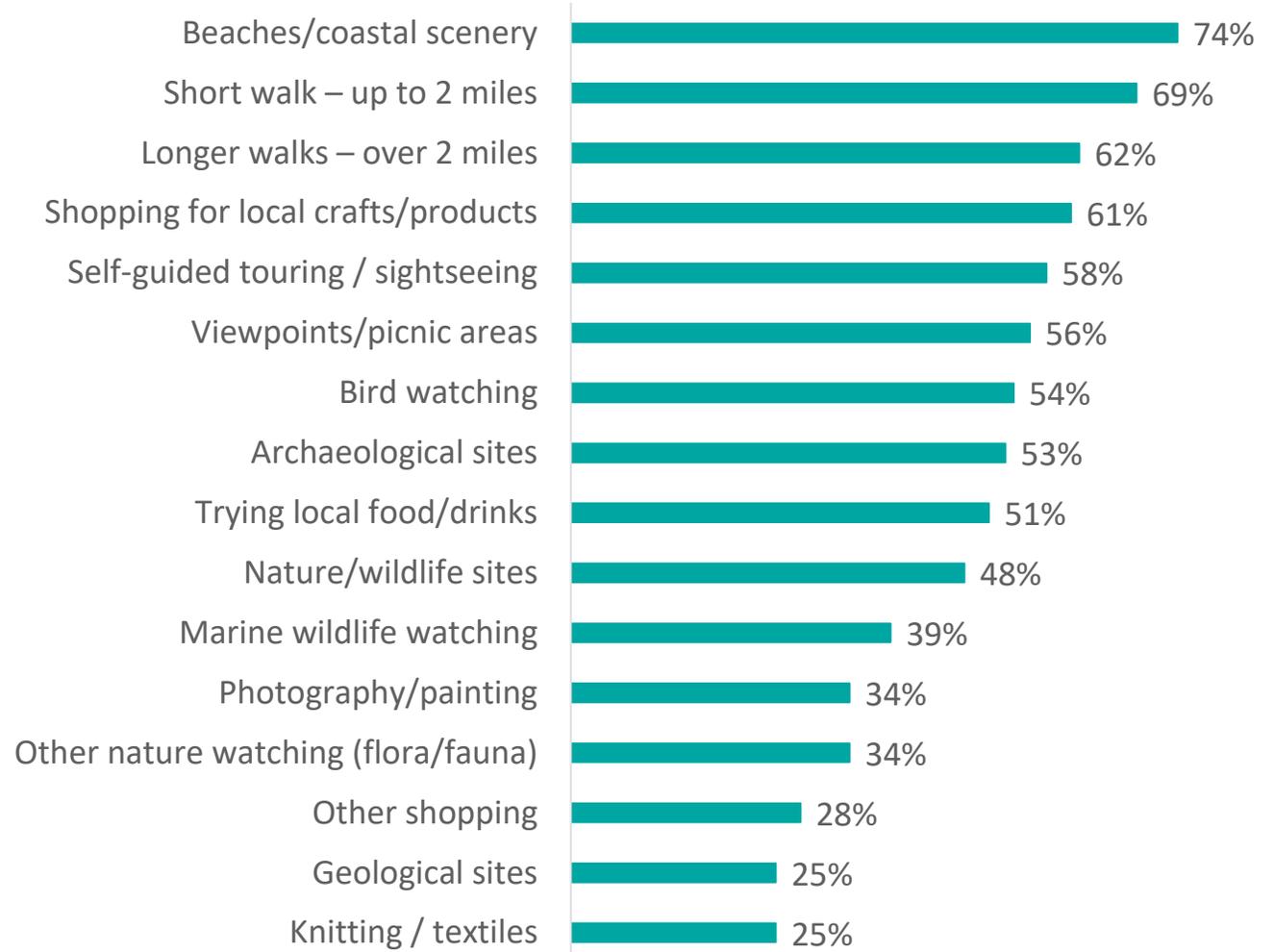
Base (All Leisure): 259

Trip profile

Activities

- Walking and experiencing the coastal scenery were the most popular pursuits for Leisure visitors to Shetland.
- Experiencing local produce was also very prevalent, with 61% shopping for local crafts/products and 51% trying local food and drinks.
- Two thirds of Leisure visitors (66%) also mentioned nature, including bird watching (54%), nature/wildlife sites (48%), marine wildlife watching (39%) and other nature watching (34%).
- The history of the islands was also of clear interest to many with more than half of Leisure visitors visiting archaeological sites.
- A number of Leisure visitors also mentioned creative activities, such as photography/painting (34%) and, perhaps unsurprisingly, knitting/textiles (25%).
- The activities that Leisure visitors enjoyed in 2019 were similar to those mentioned in 2017. There has, however, been increases in those citing some activities, including visiting coasts/beaches (64% in 2017), shopping for local products (50%), archaeological sites (37%) and nature/wildlife sites (40%).

Top activities in Shetland in detail - Leisure visitors



Base (All Leisure): 259

Q45: Did you take part in any of the following activities during your visit to Shetland?

Trip profile

Activities

- The activities noted on this chart show those selected by smaller numbers of Leisure visitors. These tended to be niche activities, such as music, cycling, swimming, other specific sports and visiting a distillery.
- 13% of Leisure visitors mentioned going to a local festival or event. For these visitors, the events mentioned included Up Helly Aa (11 respondents), the Shetland Pony Breed Show (3 respondents), Skeld Regatta (2 respondents), Shetland Folk Festival (2 respondents) and Unst Fest (2 respondents).

Other activities on Shetland - Leisure visitors



Q45: Did you take part in any of the following activities during your visit to Shetland?

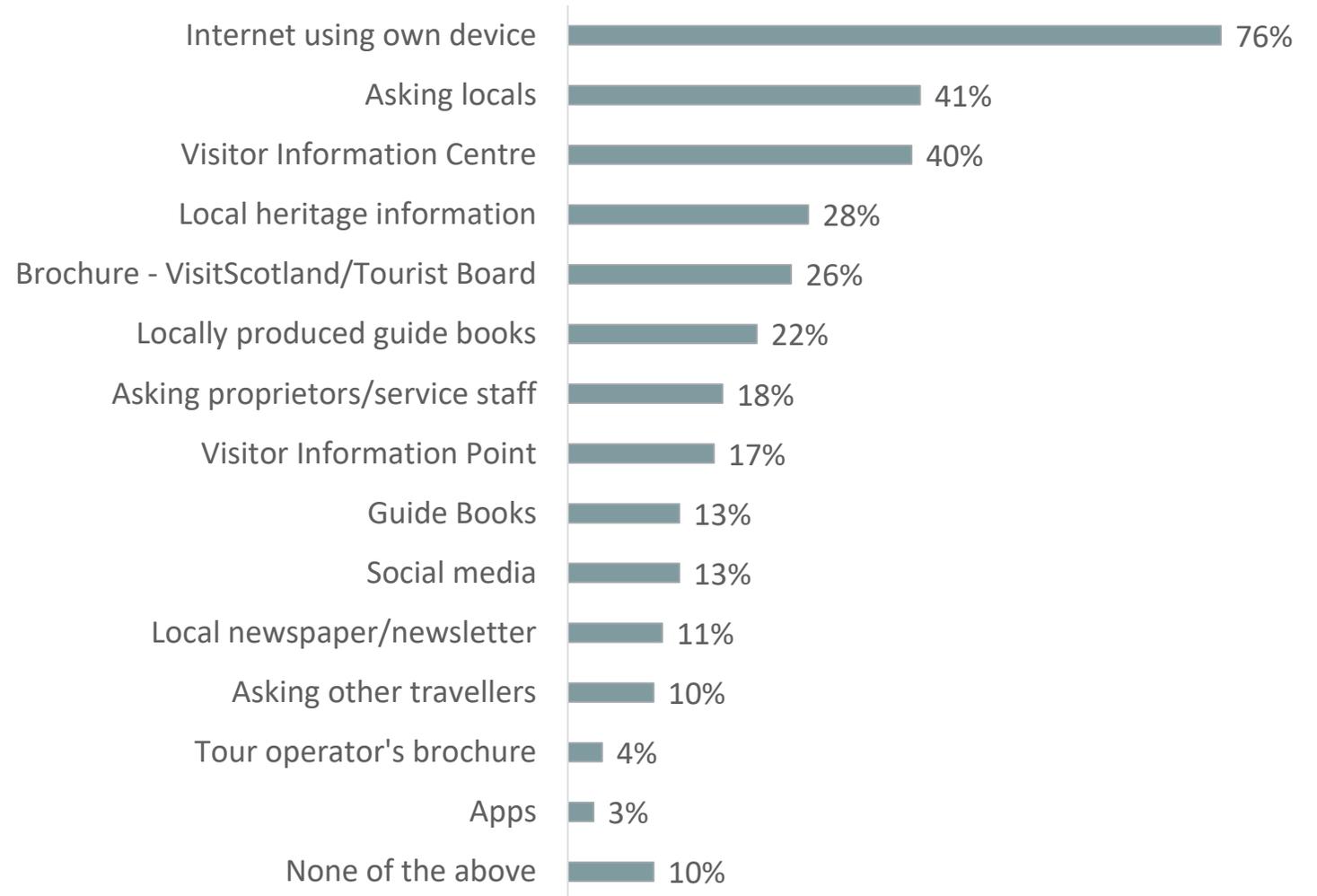
Base (All Leisure): 259

Trip profile

Information

- All respondents were asked about the sources of information they had used during their trip to Shetland. As well as being the main source of information when planning a trip to Shetland, the Internet was also the main source of information during the trip – mentioned by over three quarters of respondents.
- Visitor centres and speaking to locals were both mentioned by two fifths of all visitors, while local heritage information, brochures and local guide books were also used by around a quarter.
- As we would expect, Leisure visitors used more sources of information during their trip than VFR or Business visitors. For example, Leisure visitors were more likely to use a visitor information centres (56%) than VFR (24%) or Business (17%) visitors. A full breakdown of the information sources used by Leisure visitors is detailed over.
- A small proportion of visitors (3%) used apps during their trip. These included ZetTrans, TripAdvisor, Google maps, Ordnance Survey and Instagram.

Sources of information during trip to Shetland



Base (All, excluding rotational shift workers): 407

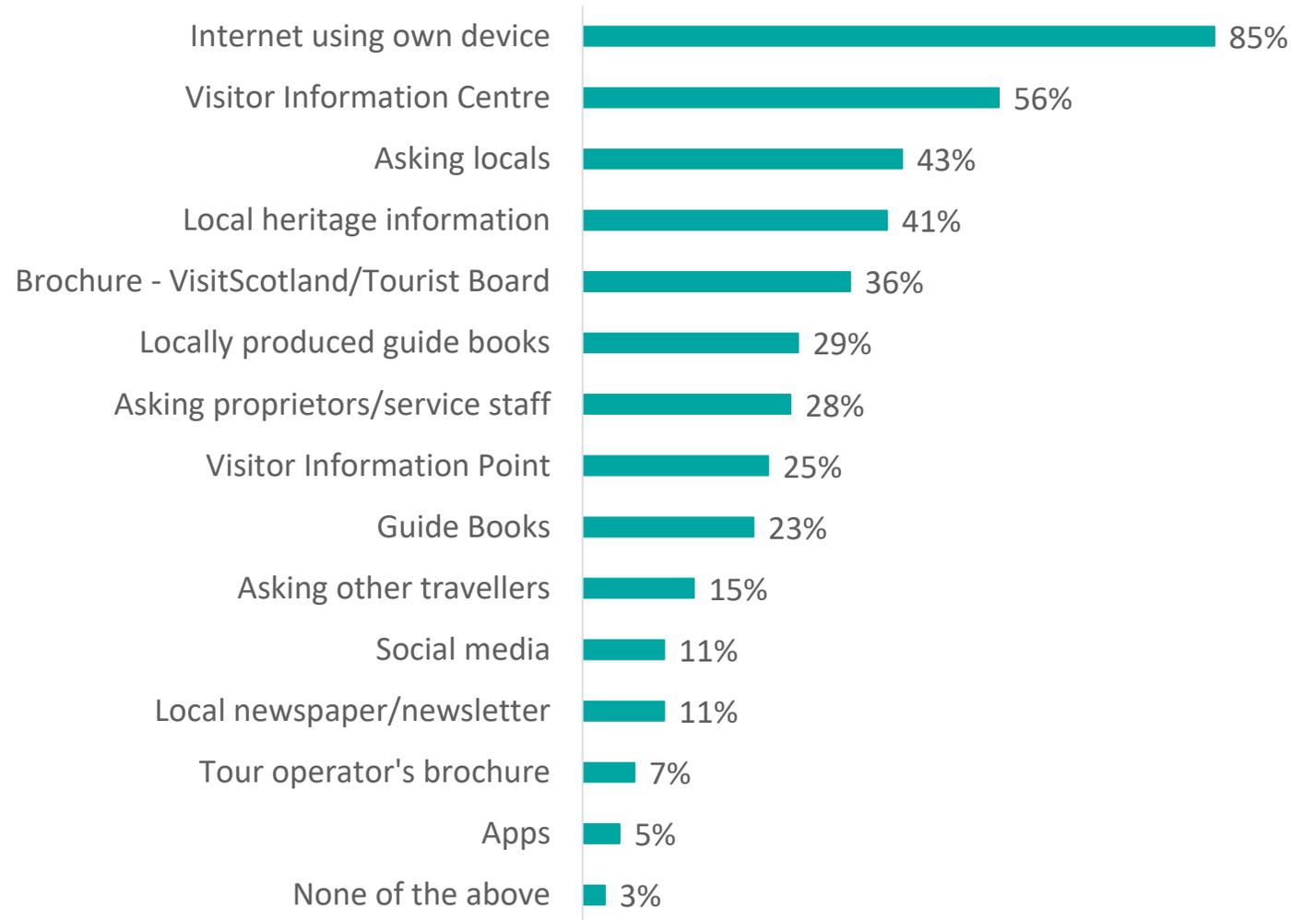
Q47: During your recent visit to Shetland which of the following methods did you use to obtain information about places to visit and things to do?

Trip profile

Information

- A wide range of sources of information was accessed by Leisure visitors, with many using more than one. Accessing the internet was the most prevalent way of looking for information (85%), followed by going into visitor information centres (56%).
- There were some notable differences in the sources of information in 2019 compared to 2017. There has been a significant increase in those using local heritage information (41%, compared to 19% in 2017). A higher proportion also reported that they spoke to proprietors/service staff for information (28%, compared to 19% in 2017). The internet was the top answer across both years, but more Leisure visitors used it in 2019 (85%) than in 2017 (70%).
- Higher proportions of visitors from overseas used VisitScotland brochures (55%) and talked to locals (54%) than visitors from Scotland and the rest of the UK.

Sources of information during trip to Shetland – Leisure visitors



Base (All Leisure): 259

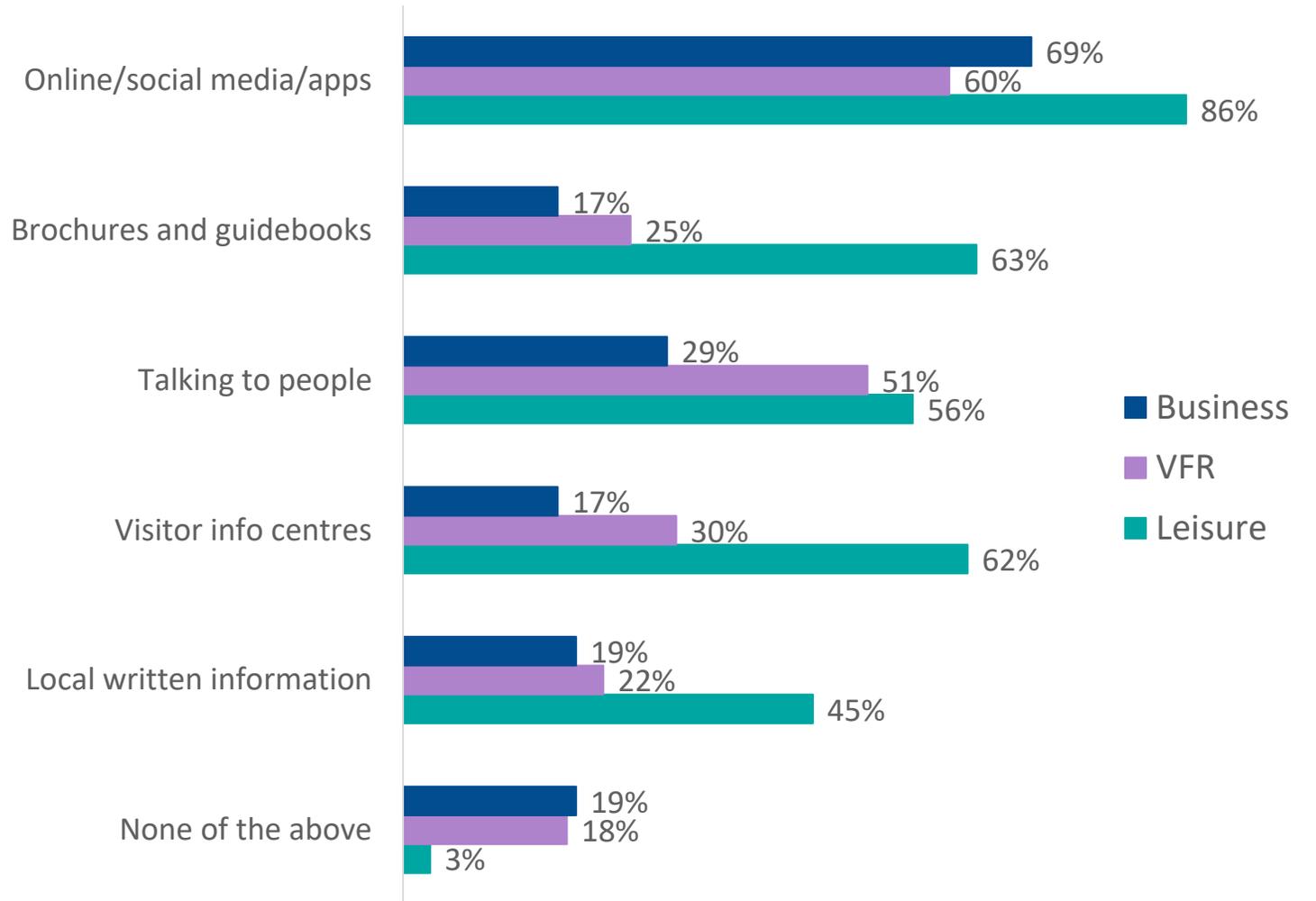
Trip profile

Information

- The types of information used during the trip have been grouped into net codes here to show key differences between the visitor types.
- Generally Leisure visitors were more likely to use multiple sources, including online/social media/apps (86%), brochures/guidebooks (63%), visitor information centres (62%) and local written information (45%).
- Leisure and VFR visitors were also likely to talk to people to source information. For both groups, this was more likely to be asking local people (Leisure 43%; VFR 50%) rather than proprietors/service staff (Leisure 28%; VFR 6%) or other travellers (Leisure 15%; VFR 5%).
- Amongst Leisure visitors, overseas visitors were particularly likely to talk to people to obtain information - 67% mentioned this compared to 50% of visitors from Scotland and 43% of those from the rest of the UK. Overseas visitors also often cited brochures and guidebooks (74%), while rest of UK visitors were the most likely to visit information centres (71%).



Sources of information during trip to Shetland



Base (All, excluding rotational shift workers):

Leisure 259; VFR 89; Business 51

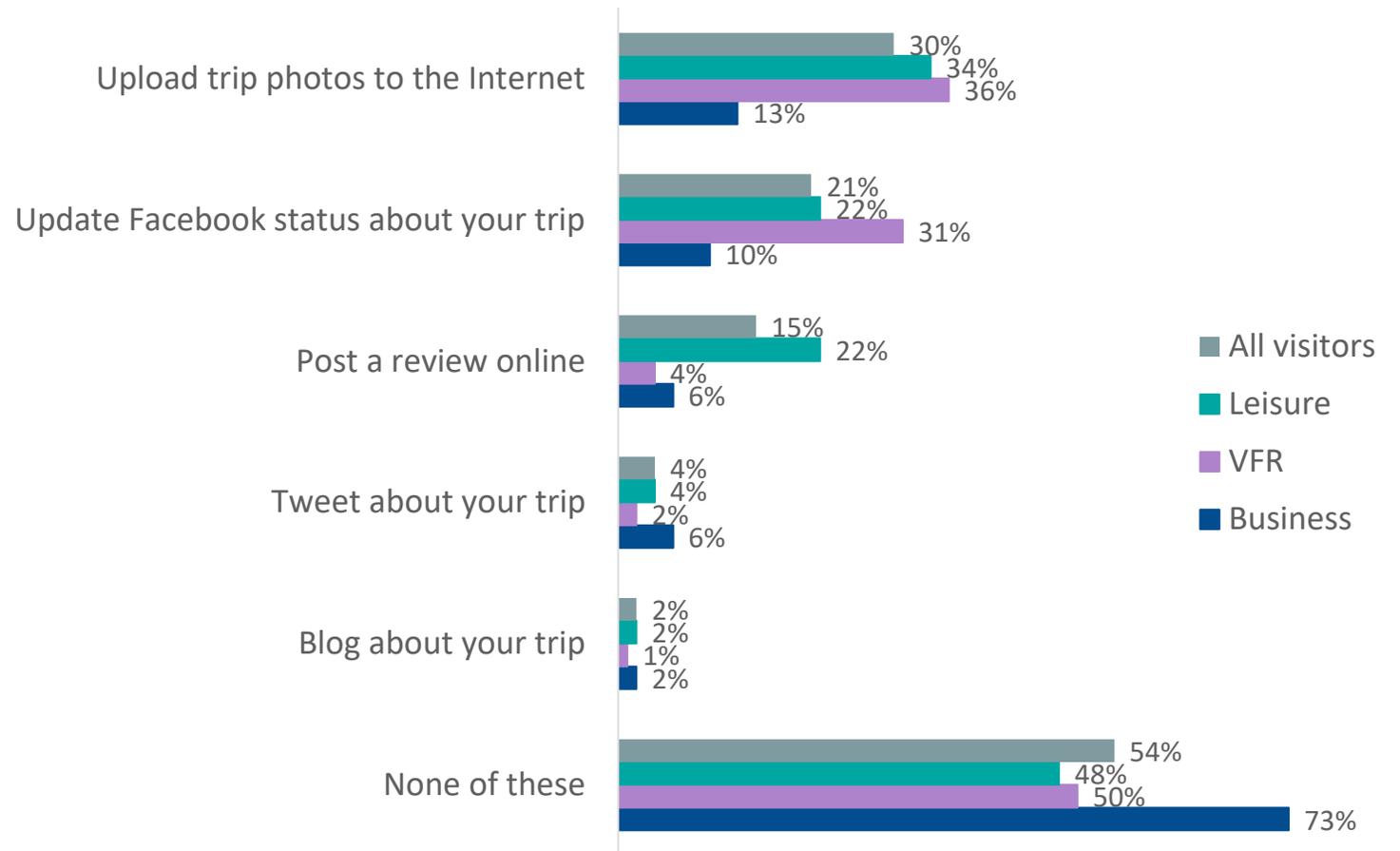
Q47: During your recent visit to Shetland which of the following methods did you use to obtain information about places to visit and things to do?

Trip profile

Information

- In total, almost half (46%) of visitors reported engaging in online or social media activity about their trip to Shetland, which is consistent with 2017 (43%). This proportion varied by visitor type – half of Leisure and VFR visitors, compared to 27% of Business visitors. Fewer Business visitors engaged in any social media/online activity in 2019 compared to 2017 (36%).
- The most often cited activity (mentioned by 30%) was uploading trip photos to the internet, while a further 21% reported updating their Facebook status in relation to the trip. Updating Facebook was particularly popular with VFR visitors (31%).
- 15% of all visitors reported that they had posted an online review. Amongst Leisure visitors the proportion was significantly higher (22%) than VFR (4%) or Business visitors (6%). The proportion of Leisure visitors posting a review has increased since 2017 (13%).
- Leisure visitors within the over 65 year old age group were less likely to have engaged with social media/online (41%) than those in younger age groups (63% of under 55 year olds).

Online / social media activity during or after trip to Shetland



Base (All, excluding rotational shift workers):
Total 407; Leisure 259; VFR 89; Business 51

Trip profile

Summary



Leisure visitors

- The profile of trips for Leisure visitors has remained highly consistent since 2017. Almost all Leisure visitors stayed overnight and overnight visitors typically stayed for 1 to 3 nights (32%) or 4 to 7 nights (51%).
- Hotels (35%) and B&Bs (31%) were the most popular accommodation types for Leisure visitors. There has been an increase in those citing 'homestay' accommodation since 2017 – from 6% to 11% in 2019.
- Travel around the islands was typically by car.
- The largest proportion (41%) were visiting as a couple, with their partner/spouse, while one in five were in family groups and one quarter were travelling alone. Only a small minority (5%) had children under 16 years old in their group.
- The top attractions were Shetland Museum, Sumburgh Head 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.
- Most (85%) reported finding information online during their trip and more than half had been to a visitor information centre.

VFR Visitors

- As with 2017 almost all VFR visitors were staying overnight – VFR visitors were most likely to be staying on Shetland for 4 to 7 nights (51%).
- As we might expect, three quarters stayed with friends or relatives.
- One third of VFR visitors were travelling as a couple, a third were travelling alone and a quarter were in a family group. A higher than average proportion of VFR visitors (13%) reported that they had children in their group.

Business visitors

- The majority of Business visitors (87%) were also staying overnight – typically staying for less than 3 nights (61%).
- Most had travelled alone (66%) and stayed in a hotel (56%) and described their accommodation as 'mid-market' (70%).
- Almost all Business visitors (91%) reported visiting Lerwick, while half also visited South Mainland and one third went to other parts of the mainland.



Evaluation of trip experience

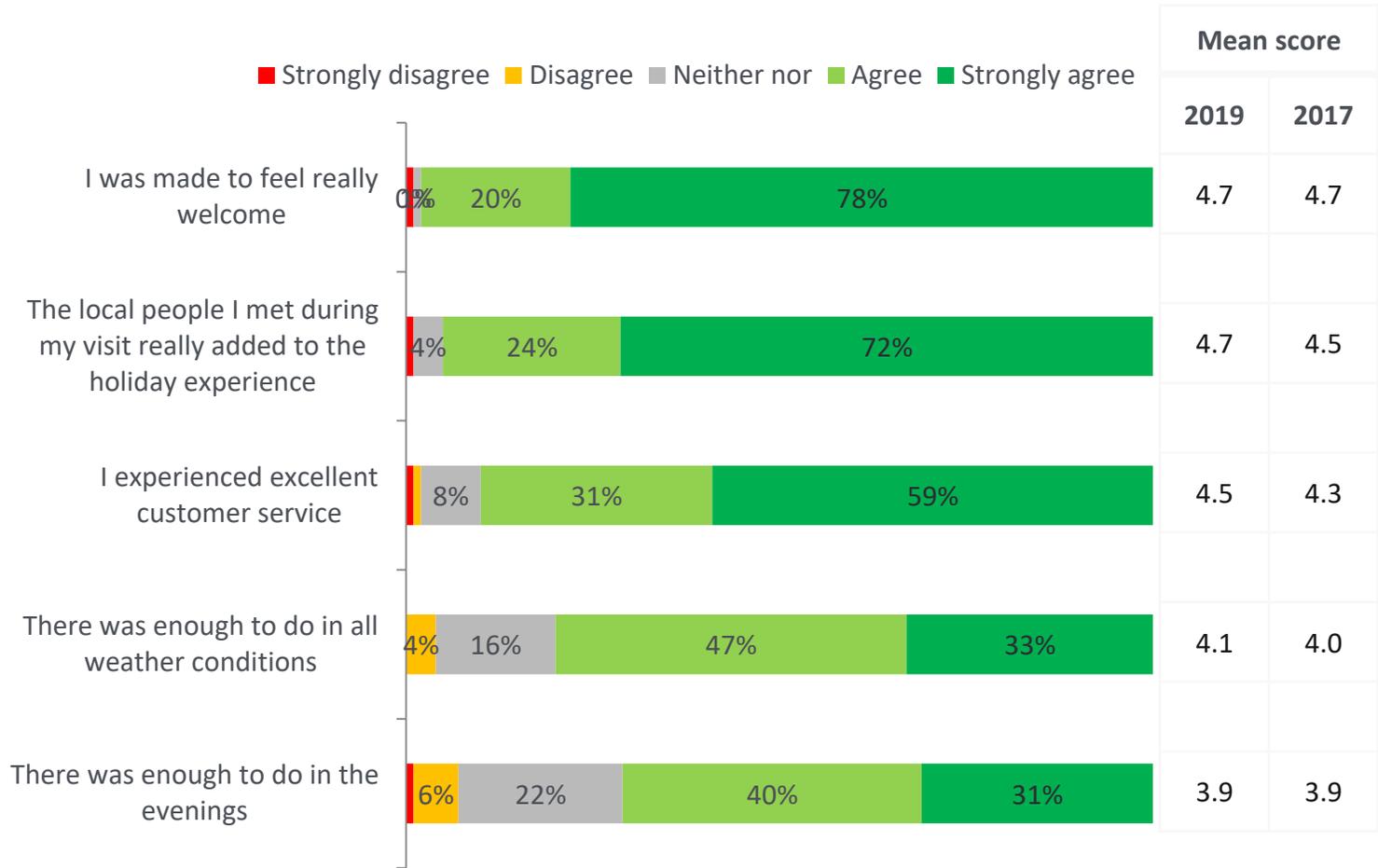
Trip evaluation

Overall experience

- When asked to agree or disagree with a series of statements about their visit to Shetland, the majority of Leisure/VFR visitors reported 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.
- In particular, 98% of respondents agreed that they were made to feel welcome, with 78% agreeing strongly.
- Agreement was weaker that there is enough to do in all weather conditions and in the evenings. However, most respondents did agree with these statements, indicating that generally visitors were satisfied with these aspects of their trip.
- Comparing these findings to 2017 shows that there have been increases in those agreeing strongly that local people really added to the holiday experience (61% in 2017) and customer service was excellent (48% in 2017). Agreement with the other statements remained consistent with 2017.



Agreement with statements about experience on Shetland – Leisure/VFR



Base (All excluding 'don't know' responses): 318 - 350

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

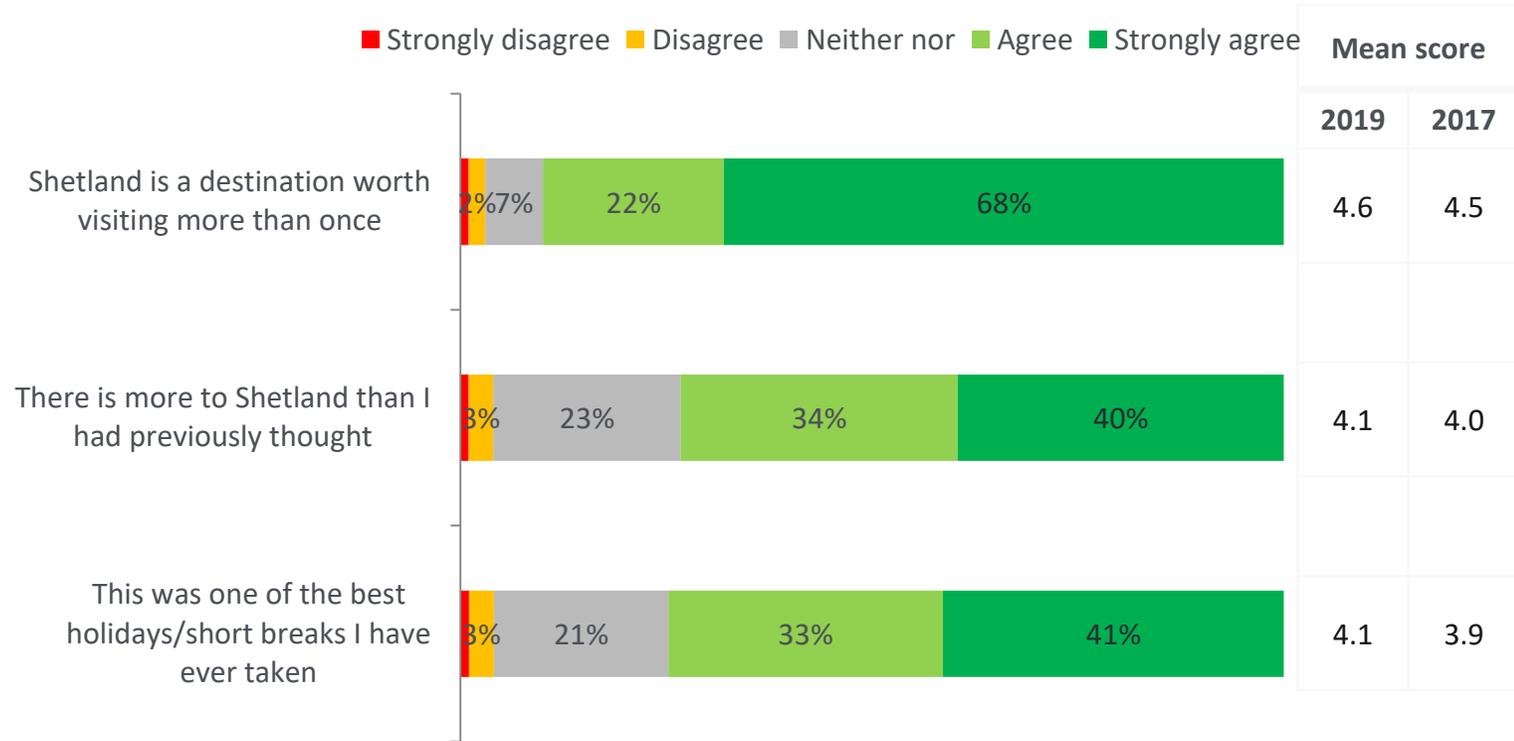
Trip evaluation

Overall experience

- Nine in ten of Leisure and VFR visitors agreed that Shetland is a destination worth visiting more than once (68% agreed strongly), indicating that the islands offer visitors both an excellent experience and a variety of attractions and things to see and do.
- Indeed, 73% agreed that there is more to Shetland than they had previously thought before visiting.
- Three quarters overall agreed that their trip had been one of the best holidays or short breaks they had ever taken, with 41% agreeing strongly with this statement.
- The findings were broadly consistent between Leisure and VFR visitors, although VFR visitors were less likely to agree strongly it was one of the best trips ever taken (33%) than Leisure visitors (45%).
- Compared to the survey conducted in 2017 there have been increases in the proportions agreeing strongly that Shetland is worth visiting more than once (62% in 2017) and that the trip to Shetland was one of the best holidays ever taken (32% in 2017).



Agreement with statements about experience on Shetland – Leisure/VFR



Base (All Leisure/VFR excluding 'don't know' responses): 331 - 342

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

Q49: Thinking of your experience in Shetland overall, to what extent do you agree or disagree with the following statements?

Trip evaluation

Overall experience – sub-sample analysis (Leisure visitors)



- North American Leisure visitors tended to be the most positive in their appraisal – higher proportions agreed strongly with some statements, compared to visitors from the UK or other overseas countries. For example, 94% of North American visitors agreed strongly that local people really added to the holiday experience, 84% agreed strongly that they experienced excellent customer service and 65% agreed strongly that their trip to Shetland was one of the best holidays they had ever taken.
- Female respondents were more likely to agree strongly with statements than male respondents. For example, 80% agreed strongly that local people really added to the holiday experience (males – 63%), 70% agreed strongly that they experienced excellent customer service (males – 51%) and 74% agreed strongly that Shetland is a destination worth visiting more than once (males – 54%).

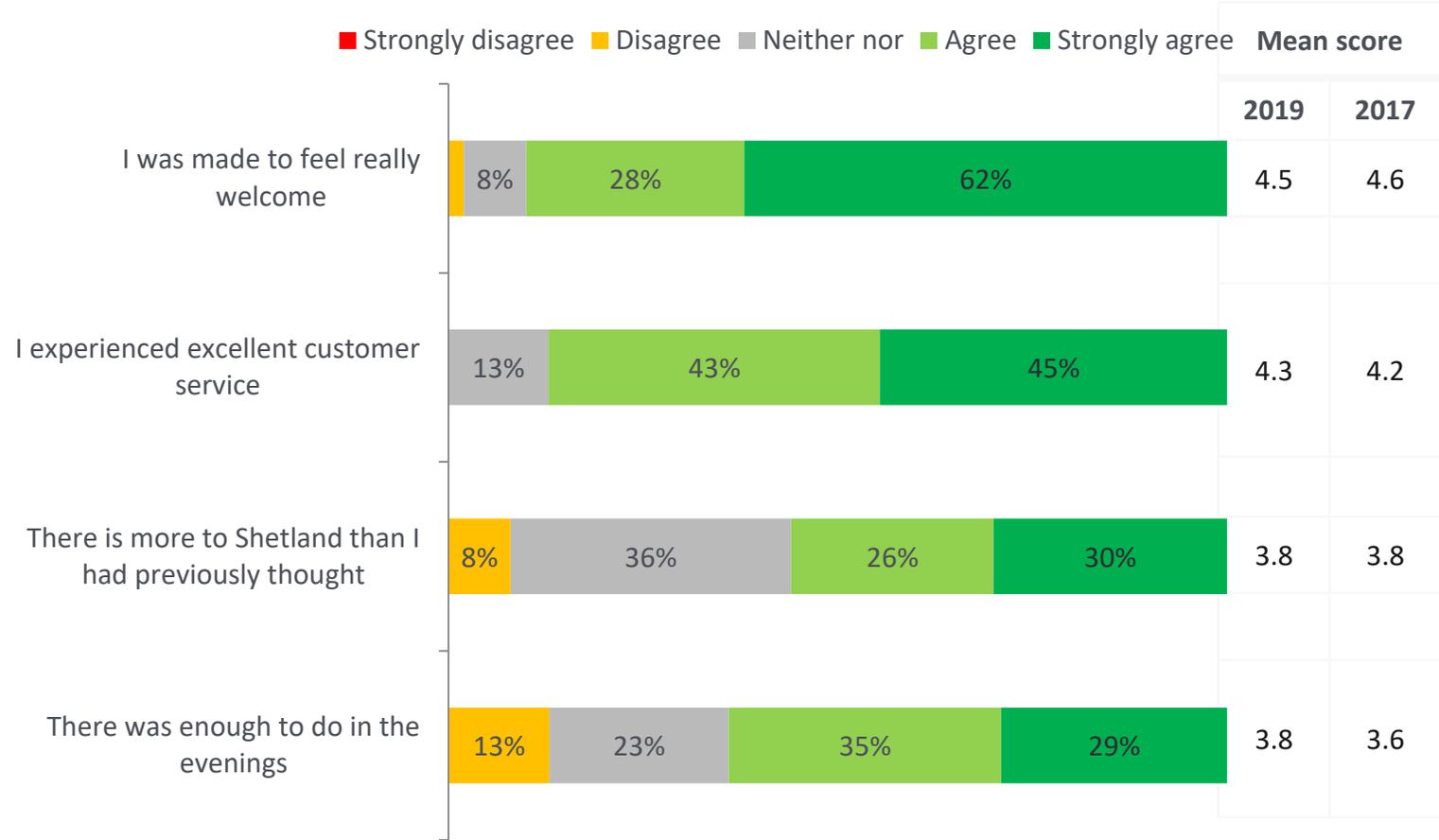
Trip evaluation

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 87% agreed overall that they experienced excellent customer service, with opinion evenly split between those who agreed (43%) and agreed strongly (45%).
- Business visitors were also positive about having enough to do in the evenings; 64% agreed although more respondents agreed (35%) rather than strongly agreed (29%).
- The general positive perceptions from Business visitors is also reflected in the fact that 56% agreed that there is more to Shetland than they had previously thought.
- The 2019 findings for Business visitors were similar to those from 2017 with no statistically significant differences.



Agreement with statements about experience on Shetland – Business visitors



Base (All Business excluding rotational shift workers and 'don't know'): 45 - 51 ⚠️

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

Q49: Thinking of your experience in Shetland overall, to what extent do you agree or disagree with the following statements?

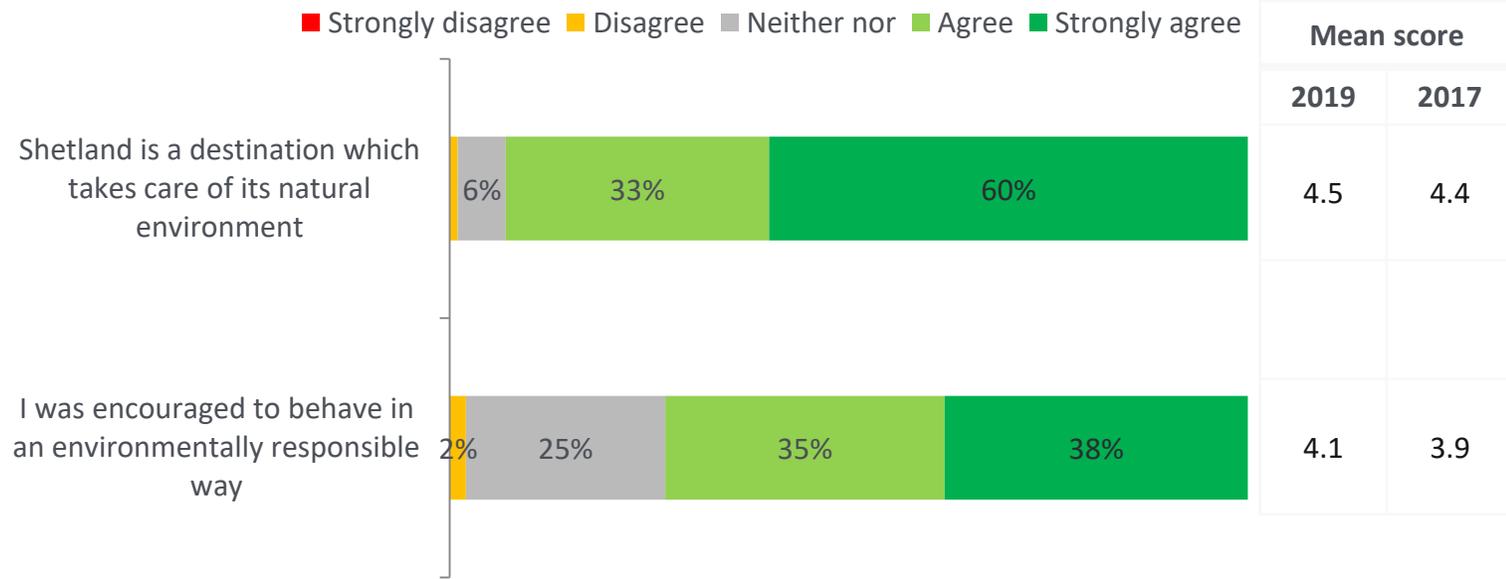
Trip evaluation

Environment

- The majority of visitors shared a perception that Shetland is an environmentally responsible destination.
- Almost all visitors (93%) agreed that Shetland takes care of its natural environment, with 60% agreeing strongly. This perception was consistent across Leisure, VFR and Business visitors.
- Almost three quarters (72%) of visitors also agreed that they themselves were encouraged to behave in an environmentally responsible way during their visit. This perception was also consistent across Leisure (74%), VFR (71%) and Business visitors (69%).
- The data is broadly consistent with 2017, with a small increase in those agreeing strongly that Shetland is a destination that takes care of its natural environment – 51% in 2017 to 60% in 2019.
- Leisure visitors from overseas were more likely to agree that they were encouraged to behave in an environmentally responsible way (82%) than those from Scotland (67%) or the rest of UK (68%).
- Female respondents were also more likely to agree strongly with these statements (70% takes care of its natural environment; 48% encouraged to act in an environmentally responsible way) than males (52% and 32% respectively).
- Respondents aged under 45 years old were more likely to agree strongly that Shetland takes care of its natural environment (75%) than those aged over 65 years old (48%).



Agreement with statements about experience on Shetland - Environment



Base (All excluding rotational shift workers and 'don't know'): 386 / 387

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

Q49: Thinking of your experience in Shetland overall, to what extent do you agree or disagree with the following statements?

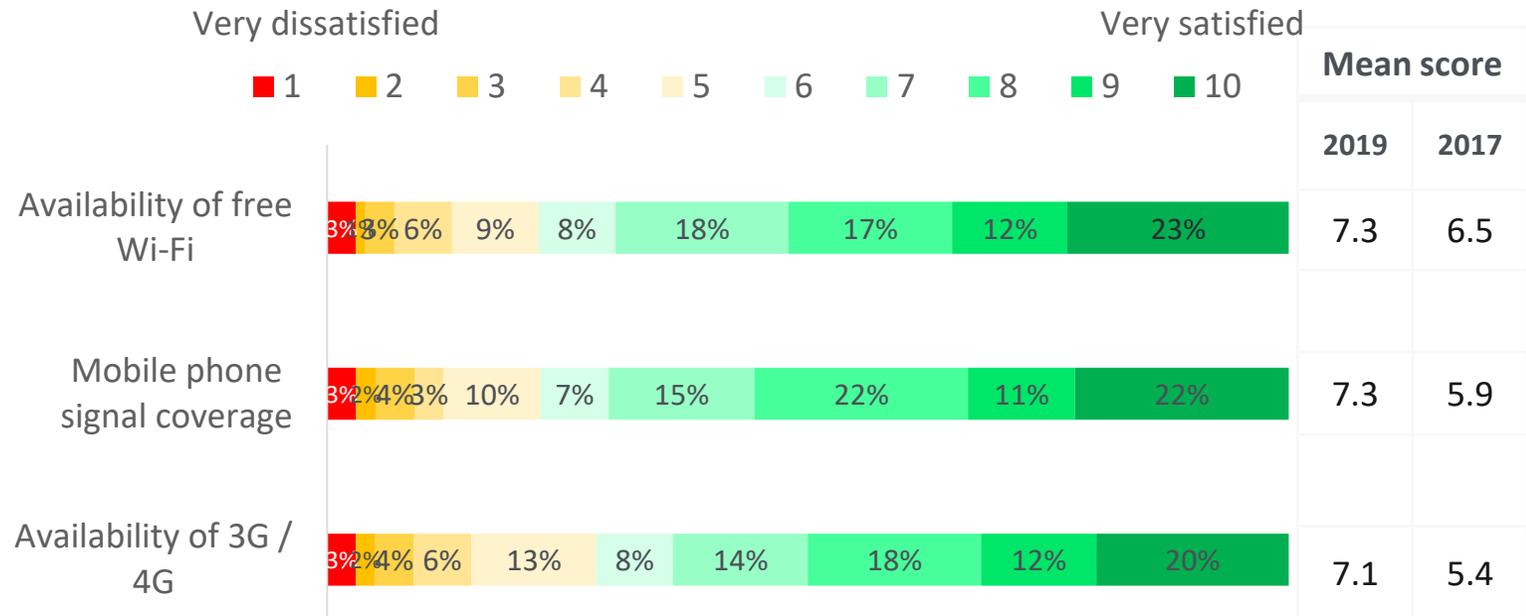
Trip evaluation

Digital coverage



- Visitors were generally satisfied with digital services on Shetland, with free Wi-Fi, the availability of 3G/4G and mobile phone coverage all achieving mean scores of over 7 out of 10.
- These figures have moved in a positive direction since 2017. In the previous study Wi-Fi availability received a mean score of 6.5 and 35% gave a score of 5 or less. Similarly, satisfaction with mobile phone coverage has improved since 2017 when it received a mean score of 5.9 and 43% gave a score of 5 or less.
- The 2019 wave of research also revealed a significant improvement in satisfaction with 3G/4G coverage. In 2017 opinion was split, with 46% giving a score of more than 5 and 54% scoring 5 or less (mean score – 5.4). In 2019 only 27% gave a low score of 5 or less and 73% scored 3G/4G 6 to 10 (the overall mean score was 7.1).
- Nevertheless, there remains some scope for improvement, with 27% scoring 5 or less for the availability of 3G/4G, 21% scoring 5 or less for mobile phone coverage and 22% scoring 5 or less for the availability of free Wi-Fi.
- Leisure visitors from North America tended to be more satisfied with digital coverage than those from elsewhere, particularly the availability of free Wi-Fi. Indeed, over half (54%) of visitors from North America gave a score of 10 for free Wi-Fi availability.

Satisfaction with digital coverage



Base (All excluding rotational shift workers and 'don't know'): 323 - 363

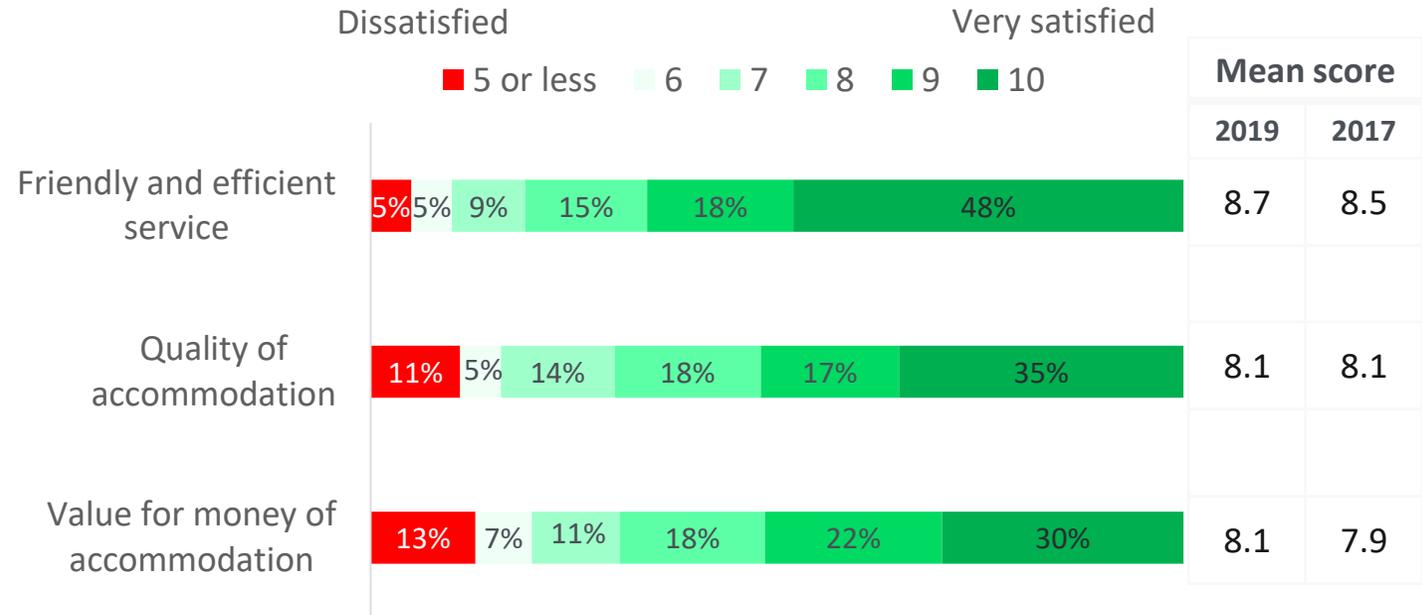
Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

Trip evaluation

Accommodation

- In general, visitors were satisfied with the quality, value for money and service received at their accommodation. In particular, the majority (66%) gave a score of 9 or 10 out of 10 for a friendly and efficient service.
- There was some minority concern (over 1 in 10 visitors) about the quality and value for money of accommodation.
- The findings were generally very similar to 2017. However, there has been an increase in those providing a 10 out of 10 score for friendly and efficient service – from 39% in 2017 to 48% in 2019.
- Satisfaction tended to be higher for Leisure and VFR visitors than for Business visitors, although the majority of Business visitors were positive about their accommodation.

Satisfaction with accommodation



Base (All staying in paid accommodation excluding 'don't know'): 293 - 301

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

Q51: Thinking about the accommodation you stayed in, how satisfied were you with the following aspects of your accommodation?

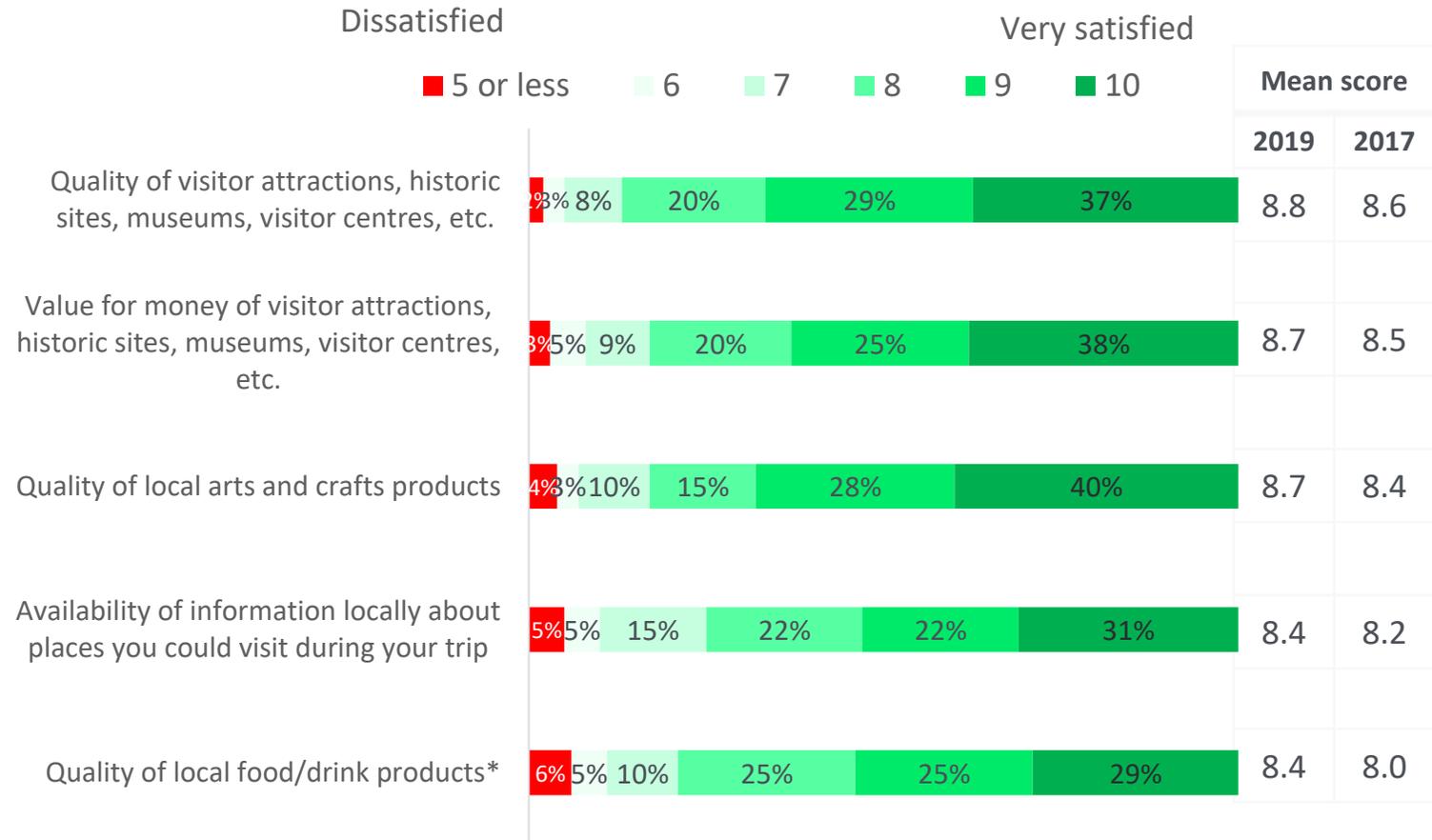
Trip evaluation

Satisfaction with aspects of trip

- The majority of visitors reported they were satisfied with various aspects of their trip to Shetland. Indeed, all of the aspects listed opposite attracted mean scores of over 8 out of 10 in terms of satisfaction.
- The quality of visitor attractions, such as historic sites and museums, was the highest rated aspect – 66% of visitors scored this with 9 or 10 out of 10. Attractions on Shetland were also thought to offer good value for money – 63% scored this with a 9 or 10.
- The quality of local food/drink and arts/crafts products were also highly regarded by most visitors. In particular, more than two thirds of respondents rated arts and crafts products with 9 or 10 out of 10.
- Information provision locally was also praised, with a mean score of 8.4 across the sample.
- There have been some improvements in satisfaction scores since the 2017 wave of research. Most notably, the proportion giving the quality of local arts and crafts products 10 out of 10 has increased from 28% in 2017 to 40% in 2019. There has also been an increase in those giving a score of 10 for the quality of local food and drink products – from 20% in 2017 to 29% in 2019.

Q52: How satisfied were you with the following aspects of your visit?

Satisfaction with key aspects of trip



*Includes business visitors.

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

Base (All, excluding 'don't know'): 279 - 368

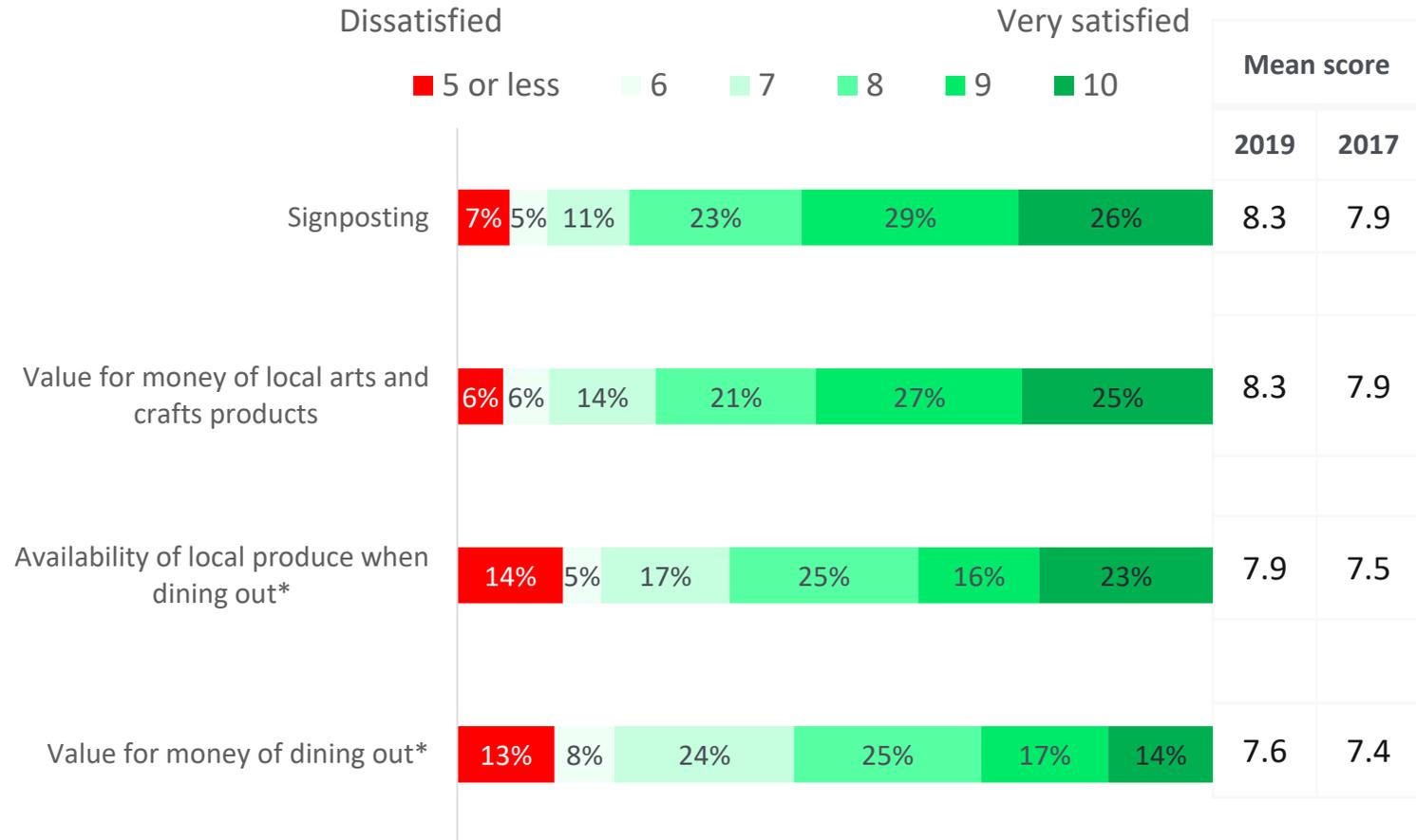
Trip evaluation

Satisfaction with aspects of trip

- The aspects detailed here attracted slightly lower scores than the previous chart, however, the assessment of each remains very positive – all score on average 8 out of 10.
- The value for money of dining out scored slightly lower compared to some other aspects, suggesting that, for some, eating out was expensive. This perception is unchanged from 2017.
- Some respondents would also like to see more local produce available in the restaurants on Shetland.



Satisfaction with key aspects of trip



*Includes business visitors.

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

Base (All, excluding 'don't know'): 271 – 376

Trip evaluation

Satisfaction with aspects of trip – sub-sample analysis (Leisure visitors)



- Amongst Leisure visitors, those from North America were the most likely to provide a score of 10 out of 10 across a range of aspects of their trip. For example, 69% scored 10 for the quality of arts and crafts products, 65% for the quality of visitor attractions and 65% for the value for money of visitor attractions.
- Female respondents tended to state slightly higher levels of satisfaction than males. For example, 83% of female respondents gave a score of 8 to 10 for the value for money of local arts and crafts products, compared to 66% of males.

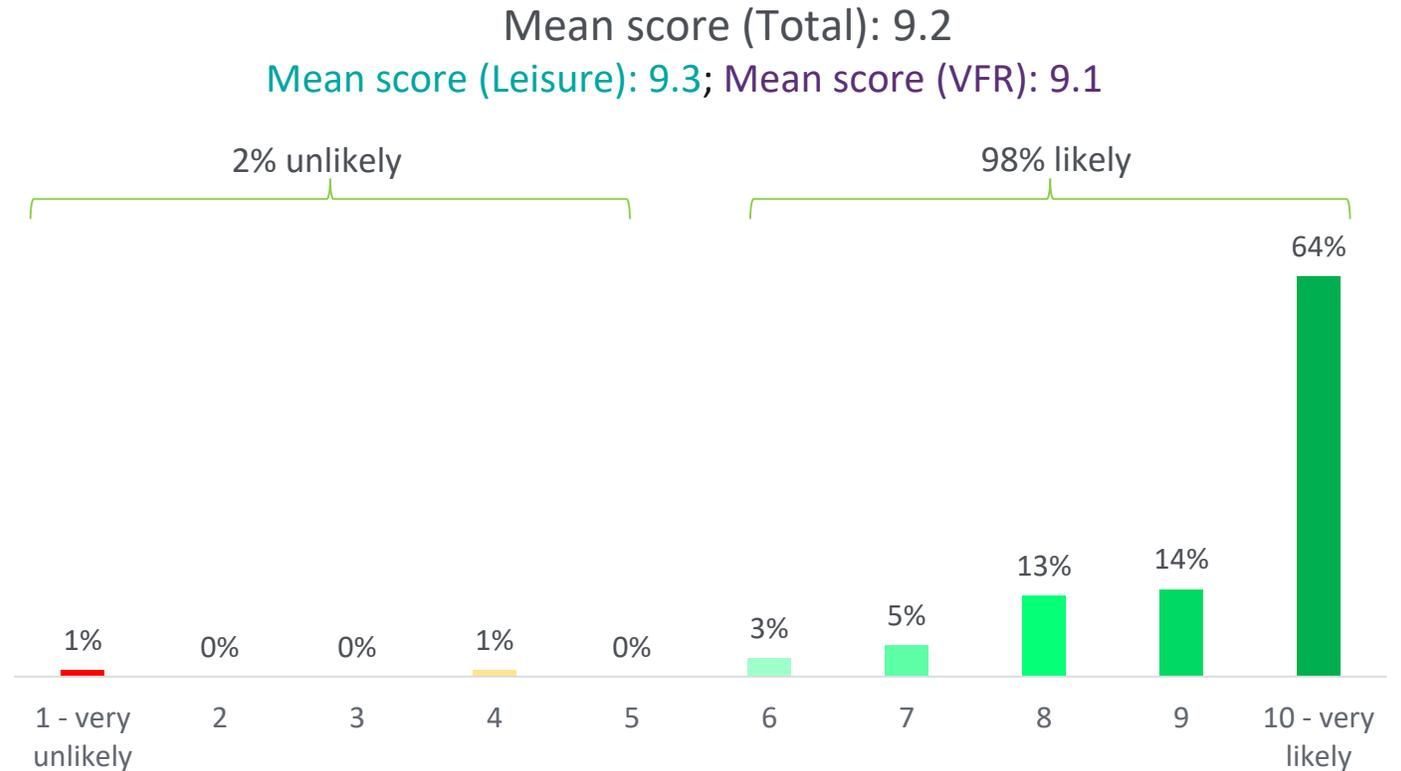
Trip evaluation

Recommendation

- Leisure and VFR visitors were asked if they would recommend Shetland as a holiday destination. It is a reflection of the quality of the visitor experience that almost all reported that they would. Indeed, 64% gave a perfect 10 out of 10 recommendation score.
- The likelihood to recommend Shetland in 2019 was higher than 2017, when 59% scored 10 and the mean score was 9.1.
- Findings were similarly positive for both Leisure and VFR visitors.
- There were no statistically significant differences in likelihood to recommend Shetland across Leisure visitors from Scotland, the rest of the UK or overseas.
- Amongst Leisure visitors, female respondents were more likely to score 10 for likelihood to recommend (74%) than males (57%).



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



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

Base (All Leisure/ VFR, excluding 'don't know'): 348

Q53: Based on your experiences during this trip, how likely are you to recommend Shetland as a holiday or short break destination to friends and family?

Trip evaluation

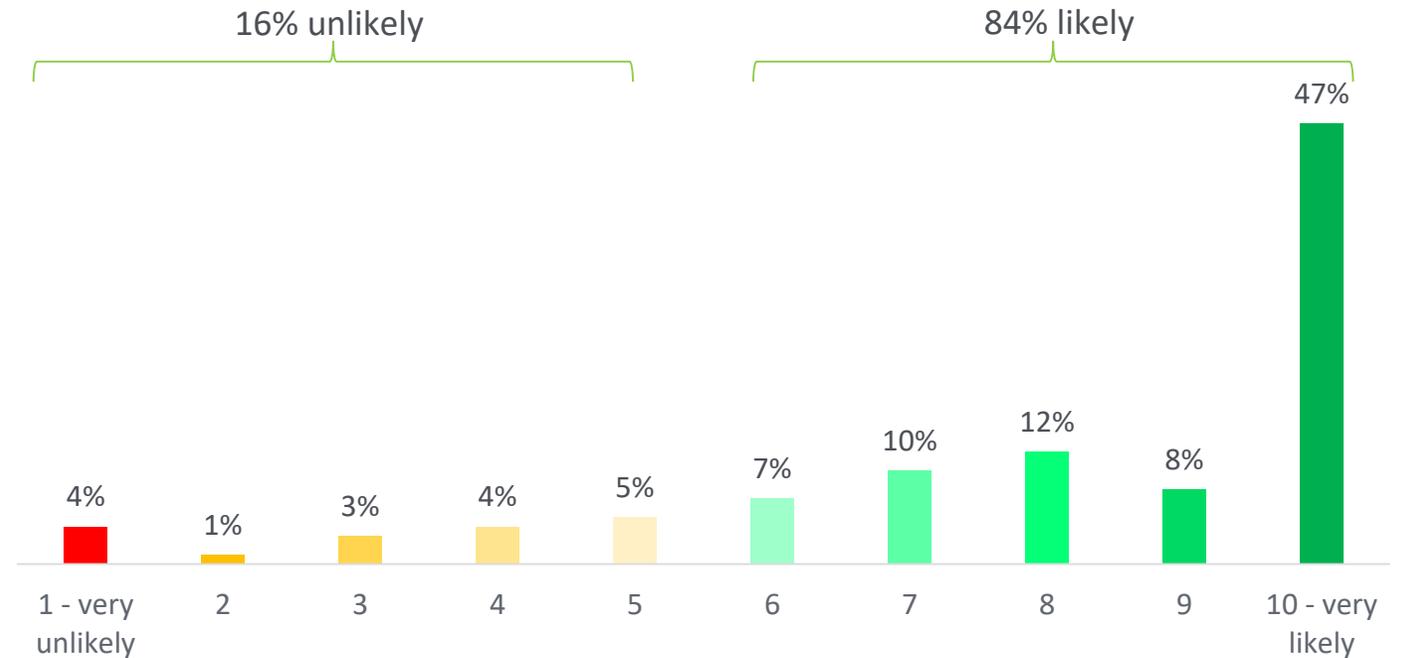
Return visit

- When asked how likely they were to return to Shetland for a short break or holiday in the next 5 years, the majority of visitors responded positively - 84% scored 6 or more out of 10, with 47% scoring 10 out of 10 indicating that it is highly likely.
- Likelihood to return to Shetland in 2019 closely mirrored the data from 2017 when 84% scored 6 or more and 44% scored 10. The overall mean score in 2017 was also very similar at 7.9.
- As we found in 2017, the findings in 2019 varied by visitor type. VFR visitors were the most likely to anticipate a return visit (65% 10 out of 10; mean score 9.0).
- Given the mix of domestic and international visitors within the Leisure sample it is not surprising that propensity to return is slightly lower. However, this group was also strongly weighted to an intention to return, as noted in the data detailed over.

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



Mean score (Total): 8.0
 Leisure: 7.7; VFR: 9.0; Business 7.7



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

Base (All excluding 'don't know'): 396

Q54: 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

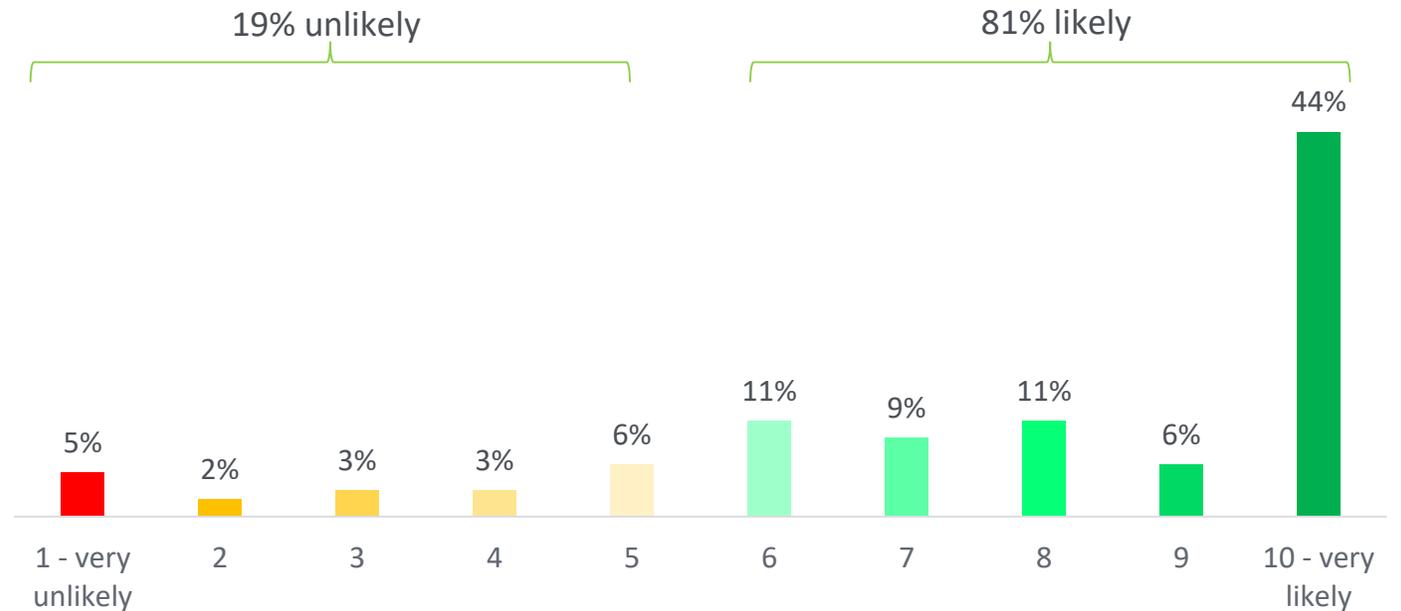
Return visit

- Over four fifths of Leisure visitors considered it likely that they would return to Shetland within 5 years, giving a score of 6 or more. The attitudes of Leisure visitors in 2019 were similar to 2017, when 84% scored 6 or more and 43% gave a score of 10.
- Interestingly, amongst Leisure visitors there were no statistically significant differences in likelihood to return to Shetland between Scotland, rest of UK and overseas visitors. A significant proportion of Leisure visitors from each of these origin areas scored 10 out of 10 – Scotland 49%; rest of the UK 43%; overseas 42%.

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



Mean score (Leisure): 7.7



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

Base (All Leisure excluding 'don't know'): 238

Q54: 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

Highlight

- When asked to specify, in their own words, the highlight of their trip to Shetland, the highest proportions of respondents mentioned its scenery and landscape (30%) the wildlife (22%) or a specific attraction or place (21%).
- 16% of the Leisure and VFR visitors also mentioned interactions with the local islanders. Many spoke of how friendly and helpful the people on Shetland were and the knowledge of staff at attractions and accommodation.
- The highlights mentioned in 2019 were very similar to those mentioned in 2017.

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



Open ended question grouped by theme	%
Scenery / beauty / landscape / views	30%
Wildlife	22%
Attraction / specific places	21%
Nice people / locals / community	16%
Visiting family / friends	7%
History / archaeology	7%
Peace / quiet / relaxation / remote	7%
Walks	6%
Food & Drink	4%
Beaches	4%
Other event	4%
Up Helly Aa	3%
Other	3%
Local crafts / shops	3%
Good weather	2%
Tour/tour guide	2%
Ferry trip	1%
Fresh air	1%
Photography	1%
Cleanliness	1%
Accommodation	1%

Trip evaluation



Highlight – examples of verbatim comments

The natural beauty of the islands, especially the beaches

We were really impressed by the displays at the lighthouse, cleverly done

The friendliness of the people. I stayed at the Scalloway hotel. The owners were great and made me feel very welcome. All the Shetland Islanders I met and spoke to were helpful and friendly. That's a big deal for a solo (female) traveller like myself.

The food was amazing - local Shetland mussels, local gin and locally caught fish.

Walking along the top of Unst. I was ecstatic with how beautiful it was. I fell into a massive hole and I had so much fun!

The people! It's one of the most beautiful places on earth, the people make it magic!

When the weather was fine (which happened sometimes), looking at the landscape and the coastal scenery was magnificent: the light, the colours... makes you really amazed and happy!

Although the weather was variable there was one day when the wind dropped and the sun shone. That was the day we visited Jarlishof and had the site to ourselves. It was magic!

It was our first visit and we were delighted with every aspect - having accepted one had to take the weather as it is! It is really difficult to isolate one aspect but we were overwhelmed by the people-their kindness and real interest in all they were showing us and doing for us. Your roads were amazing

Insanely nice and welcoming people who went out of their way to show me a good time and around the island. So much more fun spending time with locals!

The wildlife. Seeing otters for the first time. The seabirds boat trip. Visiting Noss.

Peace and quiet was easy to find without having to travel miles

Trip evaluation

Highlight

- For Business visitors the local people (35%) and the scenery and landscape (32%) were the most enjoyable aspects of their trip.
- Around 1 in 10 also mentioned the wildlife they saw on Shetland as a highlight.

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



Open ended question grouped by theme	%
People / locals / community	35%
Scenery / beauty / landscape / views	32%
Wildlife	9%
Peace / quiet / relaxation	7%
Weather	7%
Other	7%
Shops / crafts	5%
Food & Drink	5%
Ease of travel	5%
Specific place	5%
Walks	4%
Museum	4%
Beaches	4%
Fresh air	4%
Accommodation	4%

Base (Business visitors excl. rotational shift workers): 57 

Trip evaluation

Improvements

- When asked about suggested improvements, 52% gave a response.
- Of those who responded, one fifth suggested improvements related to food and drink options. These comments included:
 - More local produce, especially seafood
 - Longer opening hours, especially in evening
 - More restaurants and better quality
 - More cafes
 - More pubs
- A number of visitors also suggested improvements to transport/travel:
 - More public transport/buses
 - Cheaper flights/ferries to Shetland

Suggested improvements (open-ended)



Open ended question grouped by theme	%
Food & Drink (options / cost / booking)	20%
Travel (options / costs / improvements)	20%
Signs / info	16%
Opening hours / seasonality	13%
Accommodation	8%
Goods for sale	8%
Mobile / internet	5%
Other	5%
Customer service	4%
Parking	3%
More entertainment	3%
Better weather	2%
Toilets	2%
Cheaper goods	2%
Rubbish bins / recycling	2%
Cruise ships - reduction, etc.	2%
Better paths	1%
Attractions suggestions / costs	1%
Other facilities	1%
Cleanliness	1%
Better roads	1%

Base (All who gave a response, excluding rotational shift workers): 222

Trip evaluation



Improvements – examples of verbatim comments

There are surprisingly few tea/coffee shops even in the villages. One or two churches offer such once a week.

Accommodation on Shetland seems to be too expensive for the value they offer (approx. 30% too expensive compared to mainland Scotland).

Restaurants focusing on local produce and cuisine, rather than Chinese, Indian etc. Bars with local music performers (and information about such). Information on local produce (foods), and where to find.

We felt that the quality of cuisine could have been improved. We also felt that local produce, especially fish, was surprisingly absent from several menus.

Bus connections to islands and on Sundays could be improved. We were unable to visit any islands due to the lack of bus connections.

Road signs and signs with the names of the villages. There were places in the new tourist map that was closed many years ago, for example knitting centres.

Information on when places were open was not good and it can be a long way to drive to find somewhere only open certain days and not THAT day.

No pubs!!! Having come from Devon, we were very surprised at the total lack of pub food on Shetland Islands! There were a few restaurants in Lerwick that were very busy, one fish and chip place that was extremely busy and a few hotels that we could eat out at situated in far flung places.

A lot of things I would have expected to be open on the Sunday were closed like Lerwick museum, and the less frequent bus times made it harder to get to things that were open e.g. Jarlshof and Sumburgh Head.

Expense getting to Shetland. Always find it the big obstacle not to go more frequently. Expense wise it seems to have deteriorated more since our first visit July 2005.

Trip evaluation

Negative Experience

- Just over one quarter of respondents (28%) 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 aspects that had a negative impact on visitors' experience were transport issues (18%), dining out (15%), the weather (13%) and opening times (12%).
- Approximately one tenth of those who mentioned a negative experience cited transport issues. These included expensive ferries/flights to Shetland and limitations of bus timetables.

Negative experience during the visit (open-ended)



Open ended question grouped by theme	%
Transport issues	18%
Cost / quality / variety / availability of dining	15%
Bad weather	13%
Opening times / season	12%
Customer service	10%
Other	10%
Tourists	7%
Litter / environment / cleanliness	6%
Signs	5%
Cost of other goods / services	3%
Accommodation	3%
Lack of information	3%
Mobile / Wi-Fi	1%
Parking	1%

Trip evaluation



Negative experience – examples of verbatim comments

We had hoped to get to the Hermaness Nature Reserve on Unst but were not able to book ferries for the day we wanted to, because they were on "Reduced Service". It was quite difficult to find out what this meant. We chose not to attempt to go in case we got stuck on one of the islands. We discovered later that we could have turned up at the ferries and queued for a place on the ferries.

Only the absence of enough capacity for eating out in the evening. Some of the choices don't offer decent food or good service.

Cost of meals and services. Things seem to cost the same number as in Canada BUT in £ instead of \$Canadian. So things cost about 1.65 times more. Exceeded our budget without adding extra.

Lack of signposts in some of the rural areas, looking for Brochs or beaches and never found them.

I was appalled at the rubbish in the water at Scalloway harbour.

At Jarlshof we encountered a large cruise tour group who commandeered the site. The site was too small for that amount of people at one time. We arrived at opening time of 9.30.

I wish that there had been more shops open in Lerwick selling local crafts on a Sunday but of course understand. It was just that it was only day there and we didn't realise this would be the case.

The weather was extremely limiting. Very high wind and rain during stay. Not anyone's fault!

Trip evaluation

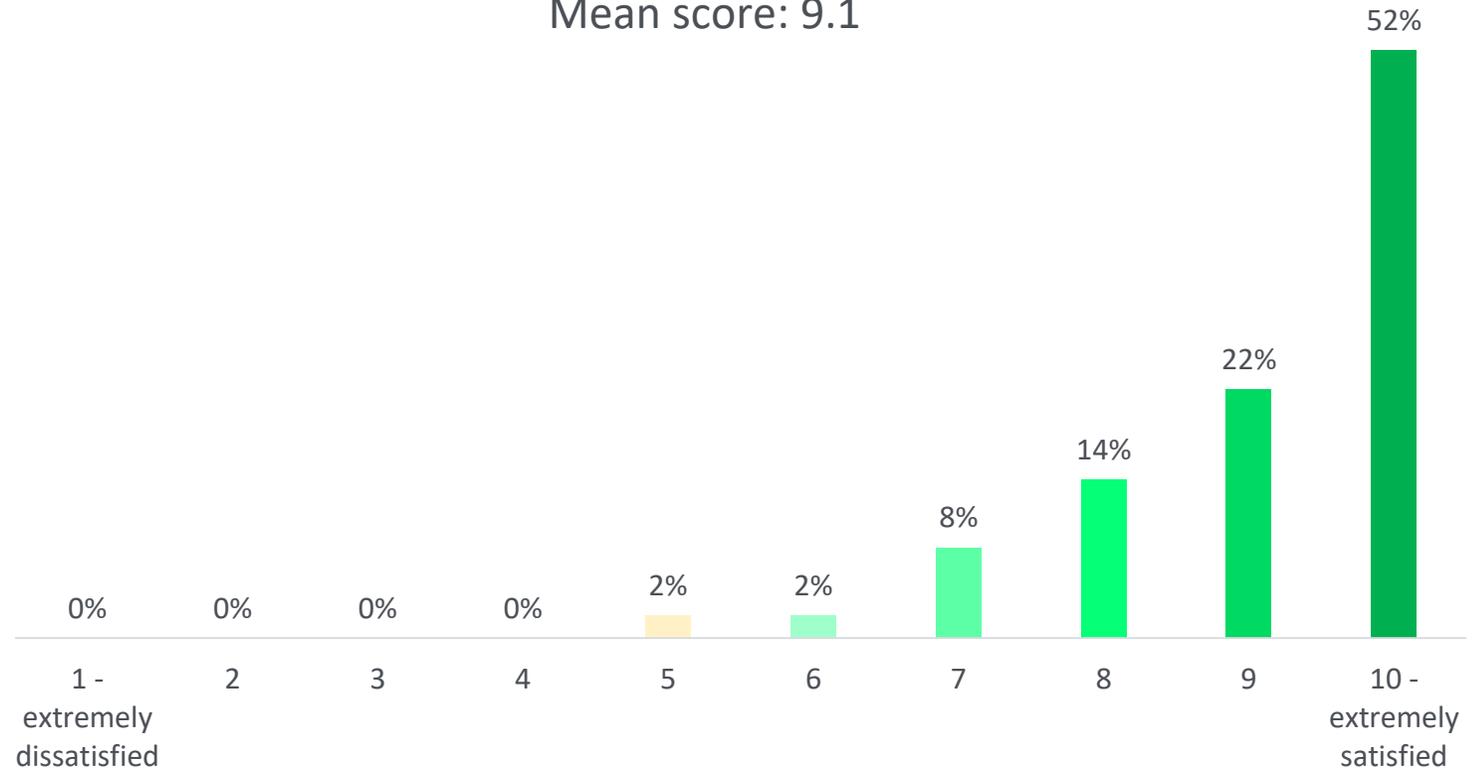
Overall satisfaction

- When asked to rate how satisfied they were with their overall visit to Shetland, respondents provided highly positive scores; 88% of respondents gave a score of 8, 9 or 10, with half scoring their visit with a perfect 10 out of 10.
- This high level of satisfaction was reflected across all visitor types, however, VFR visitors were the most likely to score 10, as detailed over.
- The scale used in the previous survey in 2017 was different so direct comparisons are not possible. However, a similar high level of satisfaction was noted in 2017, with 75% very satisfied and 19% quite satisfied.

Overall, how satisfied were with your trip to Shetland?



Mean score: 9.1



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

Base (All excluding 'don't know'): 423

Trip evaluation

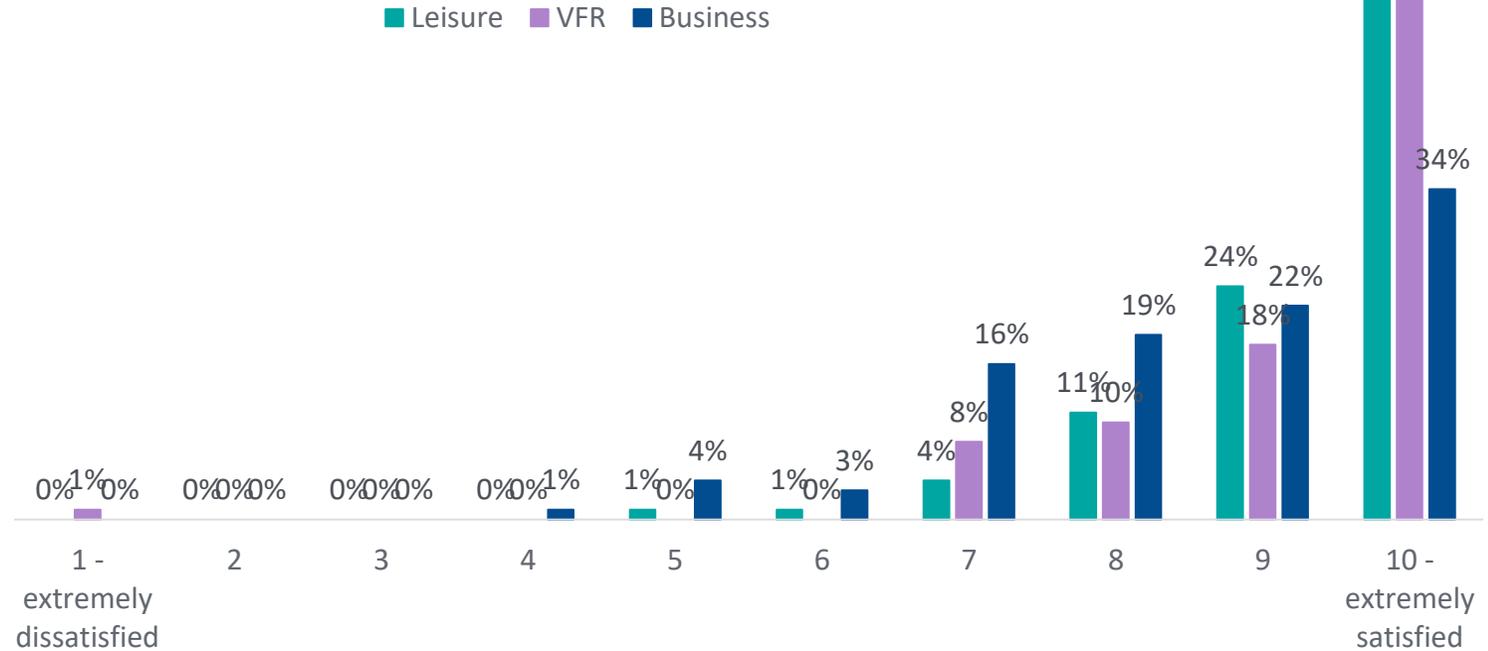
Overall satisfaction

- VFR visitors had the highest level of satisfaction with their trip, with 63% scoring it with 10 and a mean score of 9.3. Leisure visitors were also very satisfied with their visitor experience on Shetland – 83% scored 9 or 10, with an overall mean score of 9.3.
- Perhaps unsurprisingly, Business visitor were slightly less enthusiastic, although the majority were satisfied (75% scored 8, 9 or 10).
- Within the sample of Leisure visitors, there were no statistically significant differences in overall satisfaction across Scotland, rest of UK and overseas visitors.
- Amongst Leisure visitors, female respondents were more likely to score 10 (66%) than males (51%).

Overall, how satisfied were with your trip to Shetland?



Mean scores: Leisure 9.3; VFR 9.3; Business 8.5



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

Base (All excluding 'Don't know') Leisure: 259, VFR: 88, Business; 68

Trip evaluation

Summary



- Satisfaction with the experience of visiting Shetland remains very high. Three quarters of visitors agreed it was one of the best holidays they had ever taken, scored their overall satisfaction 9 or 10 out of 10 and scored 9 or 10 in terms of their likelihood to recommend Shetland as a place to visit.
- Reflecting the findings from 2017, interactions with local people were a particular highlight for many visitors in 2019 – 98% agreed they were made to feel welcome, 96% that the local people really added to their trip and 90% that they had experienced excellent customer service. Open ended comments also highlighted the pivotal role local people played in ensuring visitors enjoyed their trip to Shetland.
- Although the majority were first time visitors to the islands, many expressed an intention to make a return visit to Shetland – three fifths of Leisure visitors provided a score of 8 or more out of 10 for intention to revisit in the next 5 years.
- Satisfaction with digital services on Shetland has moved in a positive direction since 2017, particularly 3G/4G coverage. In 2019, the majority gave positive scores for mobile phone coverage, the availability of free Wi-Fi and 3G/4G coverage. However, there remains some scope for improvement with a significant minority still rating digital coverage as unsatisfactory.
- Open-ended analysis also suggests that some visitors would like to see a wider selection of restaurants and cafes and better public transport. The cost of getting to Shetland was also highlighted as a barrier to visiting.



Volume and value

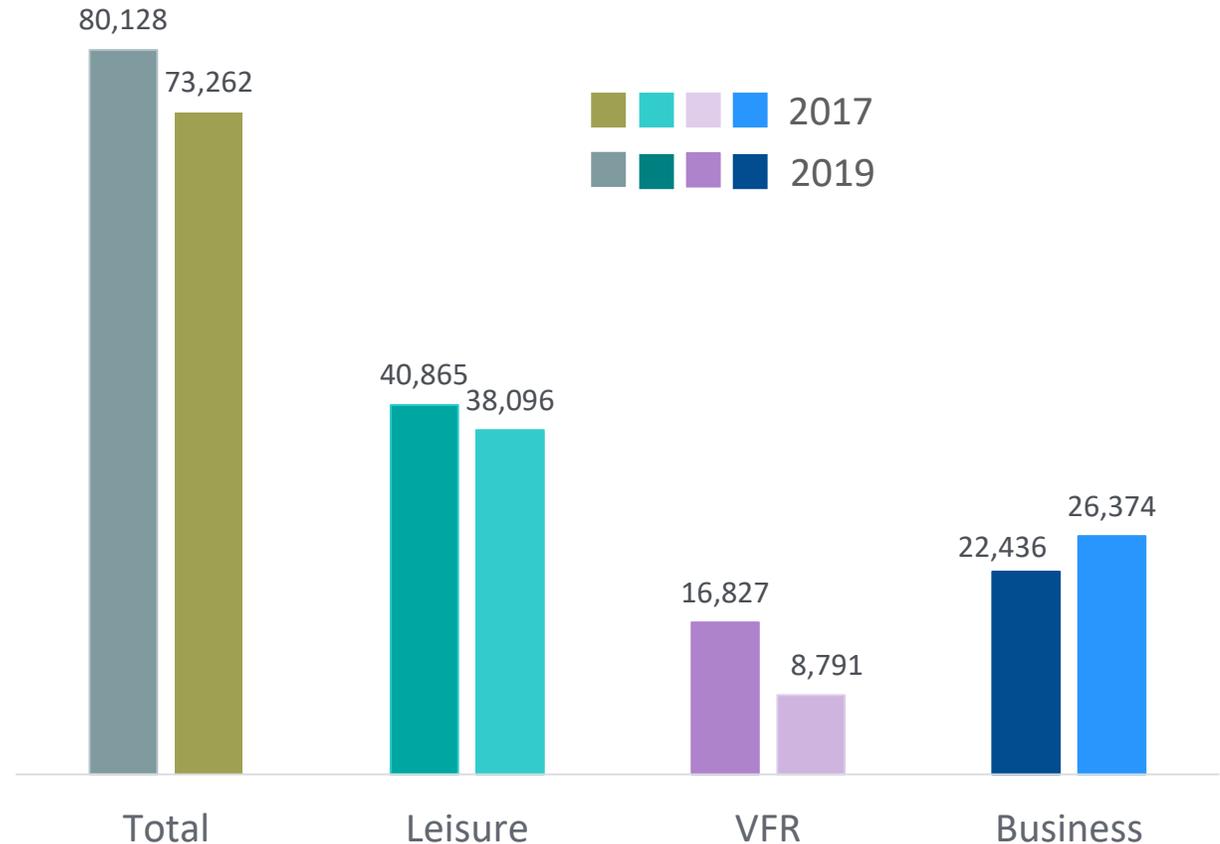
Volume and value

Visit numbers

- Total departing passenger numbers for 2019 were provided by travel operators and Shetland Islands Council.
- These figures were used to calculate the total number of visits* to Shetland based on the proportion of visitors (versus islanders) measured by the calibration survey – 49%.
- The total number of visits to Shetland in 2019 was 80,128. This is an increase of 9% in visitors since 2017.
- 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.
- The largest increase in visits in 2019 was for VFR visits. The number of Leisure visits has been fairly stable, while Business visits have decreased.

*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 2019

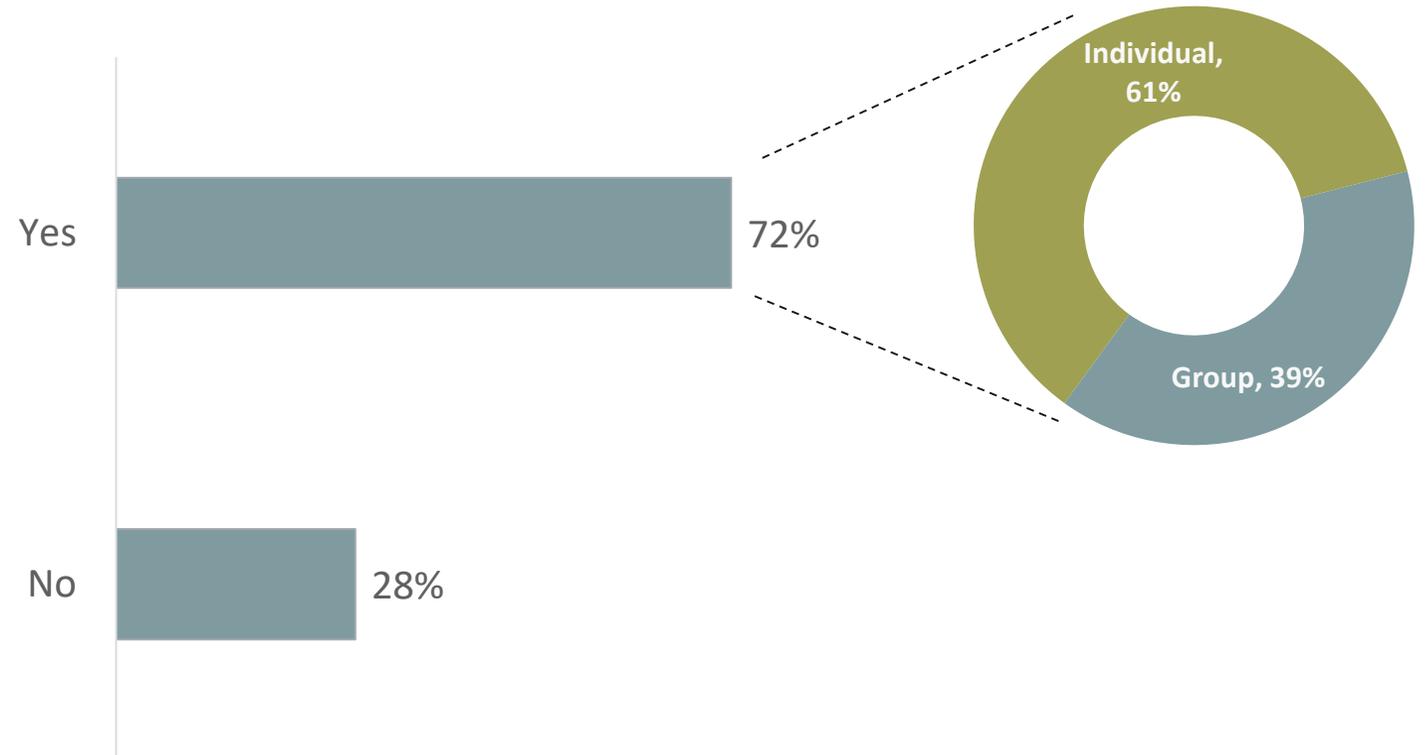


Volume and value

Provision of spend data

- In total, 72% of respondents to the online survey were able to provide spend data on their trip. All subsequent spend questions and overall value calculations are based on the data provided by these respondents.
- 61% of respondents provided individual spend figures and 39% provided group spend. All group spend data was divided by the number of people in the group to give 'spend per person'.

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



Q29: Firstly, is it easier for you to provide your own individual spend for the trip or the total spend for your group?

Base (All): 424

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 spend category. These averages are based on the total sample who provided spend data and therefore provide an indication of the average spend across all visitors.
- The highest category of spend was travel from the Scottish mainland (£193), followed by accommodation (£156).
- The overall average spend per person was £788.67. This figure includes travel expenditure to get to Shetland and full package costs, and does not therefore give the total spend per person on the Shetland Islands. This data is detailed over.

Average total spend for trip – all visitors



Total average spend per person - £788.67



Base (All who provided spend data): 276

Volume and value

Average spend

- The total average spend per person on the Shetland Islands was £448.28.
- 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.
- There have been increases in the average spend per person across most spend categories compared to 2017. For example, the average spend per person on accommodation in 2017 was £119, food and drink was £54, shopping was £28 and entertainment was £12.
- Leisure visitors tended to spend more on their trip than VFR and Business visitors. The average trip spend by visitor type is detailed over.

Average spend on Shetland Islands – all visitors



Total average spend per person on Shetland Islands - £448.28



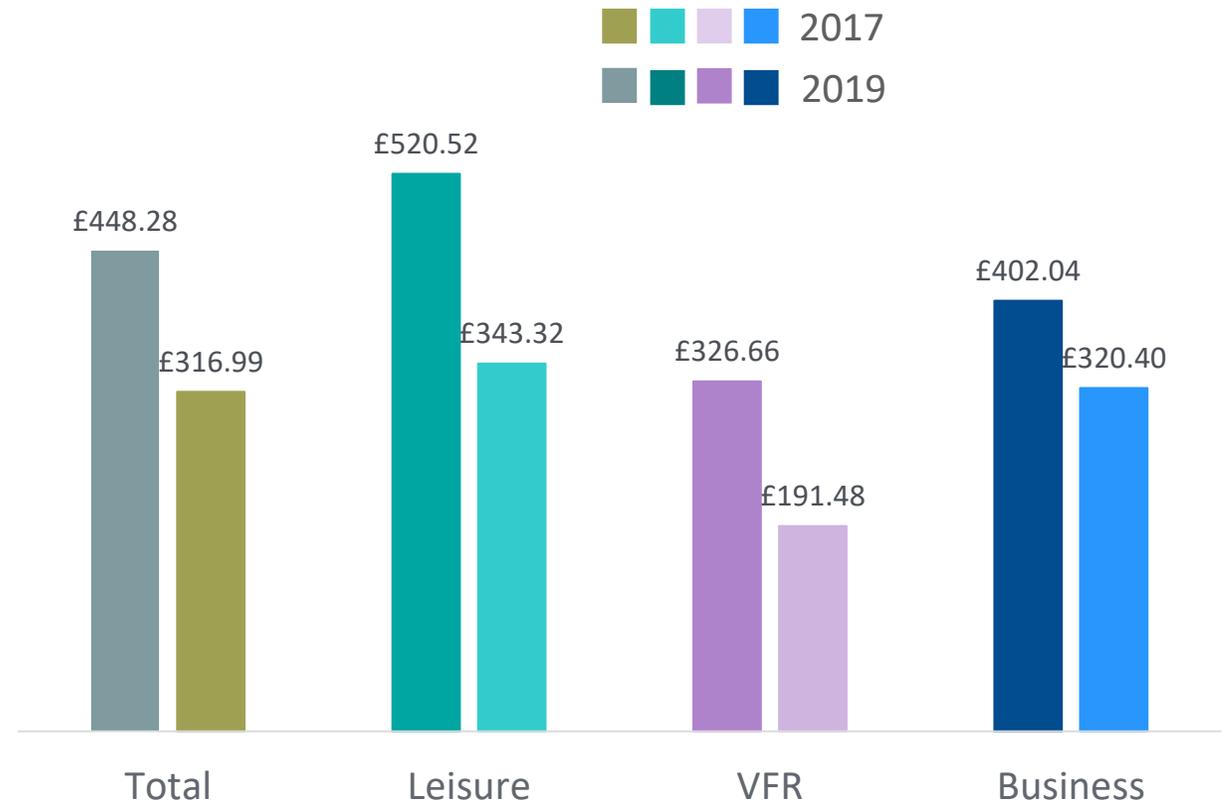
Base (All who provided spend data): 276

Volume and value

Average spend

- Leisure visitors had the highest average spend per person per trip at £520.52, which is a significant increase on 2017.
- Business visitors also had a high average spend per person £402.04.
- There was also a large increase in VFR spend per person – up from £191.48 in 2017 to £326.66 in 2019.
- The average spend for a Leisure overnight visitor was £525.26.

Average spend on Shetland Islands – by visitor type



Base (All who provided spend data):
Total 276; Leisure 172; VFR 60; Business 44

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 in 2019.
- The total value of visitor spend on the Shetland Islands in 2019 was approximately £36 million. This represents an increase of 56% on spend since 2017 (£23m).
- The largest proportion of this spend came from Leisure visits - £21.3m. This total spend for Leisure visits has increased from £13.1m in 2017.

Total spend by visitors on Shetland Islands in 2019



	Number of visitors	Average spend	Total Spend
Leisure	40,865	£520.52	£21,271,257
VFR	16,827	£326.66	£5,496,684
Business	22,436	£402.04	£9,020,131
Total	80,128		£35,788,072

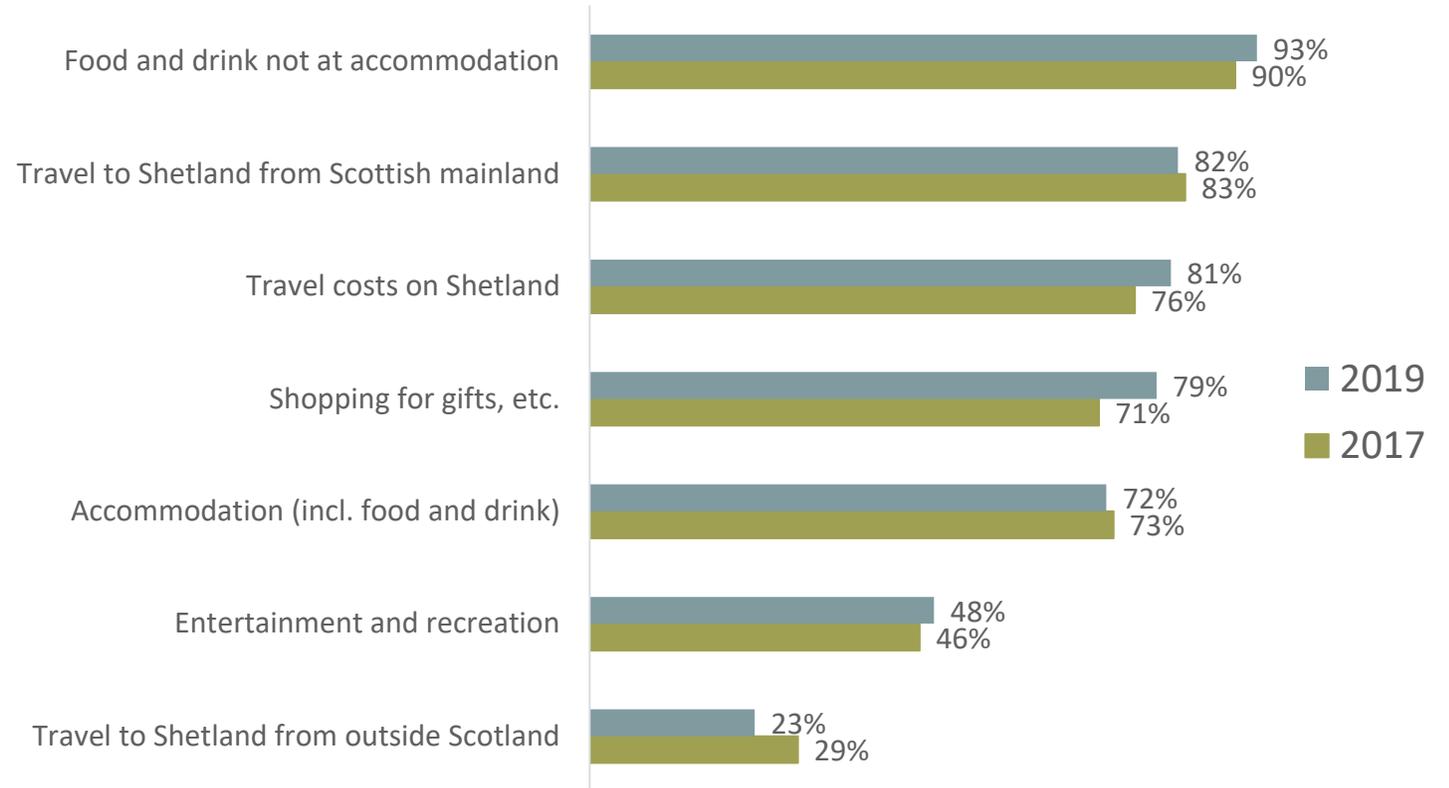
Base (All who provided spend data):
Total 276; Leisure 172; VFR 60; Business 44 

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 are consistent with 2017 data.
- Leisure visitors were more likely to incur costs on various types of expenditure than VFR or Business visitors. For example, 85% spent on accommodation, compared to 45% of VFR visitors and 68% of Business visitors. Similarly, Leisure visitors were also more likely to mention spend on entertainment/recreation (68%) than Business (14%) or VFR (40%) visitors.
- Leisure (85%) and VFR (89%) visitors were more likely to mention spend on shopping than Business visitors (58%).

Proportions providing spend data in each category – all visitors



Base (All able to provide spend in each category): 2019: 276; 2017: 576

Volume and value

Average spend

- In order to show a more accurate value for how much people spent in each category, the figures opposite are only based on those respondents who provided spend figures in each category, i.e. the averages exclude zeros.
- Therefore, for people who travelled directly to Shetland from a location outside of Scotland (e.g. Bergen) the average cost of travel was £268. Travel from the Scottish mainland costs around £236 per person on average.
- The average cost of accommodation for people staying in paid for accommodation was £217, whilst the additional costs of food and drink on the trip averaged £94 for those who incurred these costs.
- Of those who purchased gifts and souvenirs, the average amount spent on the trip was £58 per person.

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



Base (All able to provide spend in each category): 64 - 253



Final summary and conclusions

Summary and conclusions

Visitor profile



- The Shetland Islands have experienced increasing visitor numbers in recent years, which has contributed positively to the local economy. It is vital that Shetland Islands Council and its partners manage tourism in a sustainable way, while ensuring that economic benefits continue to accrue to the islands and their communities.
- A research tracking study was established to ensure that Shetland Islands Council and its partners have relevant, accurate and up-to-date data to guide strategic planning. The 2019 study is the second wave of research, following a baseline study conducted in 2017.
- Half of visitors to Shetland in 2019 were on a holiday/leisure trip, while 28% were business/work visitors and 20% had travelled to the islands to visit friends or relatives.
- The islands attract Leisure visitors from all over the world, although the largest proportion came from the UK (56%), with one fifth from Scotland (19%) and more than a third from England (35%). Almost a quarter (23%) of all Leisure visitors were from Europe (mostly Germany, Holland and France), with 11% from North America and 7% from Australia. Compared to 2017, there has been a decrease in the proportion of visitors from Scotland (30% in 2017) and an increased proportion from Europe (18% in 2017) and North America (7% in 2017).
- The gender profile of Leisure respondents was evenly split between males and females, and the age profile tended to be older (78% over 45 years old).
- Two fifths (41%) of Leisure visitors were travelling as a couple with their partner or spouse, while one fifth were in a family group. Only a small minority of 5% had children under 16 years old in their party.
- The majority of Leisure visitors (77%) were first time visitors to Shetland.

Summary and conclusions

Visitor journey



- The factors that were most influential in drawing Leisure visitors to Shetland were unchanged since the previous survey in 2017 – most people come to Shetland to enjoy the scenery and landscape and the history and culture.
- Inspiration came from a number of sources, with TV programmes and travel features in newspapers, magazines and guidebooks the most frequently mentioned. The TV series ‘Shetland’ was particularly influential in encouraging visitors.
- Planning the trip tends to start at least 3 months before travel, with visitors researching using online sources, reading travel guidebooks and talking with family and friends. All Leisure visitors were most likely to use the internet for information about Shetland, but overseas and rest of UK visitors also often used guidebooks, while those from Scotland were often guided by advice from friends and family.
- There was some evidence that in 2019 planning and booking was initiated longer before travel to Shetland than in 2017. There was also a significant decline in the proportion of visitors reporting that they did not book their accommodation in advance in 2019. These data may indicate a growing awareness of the need to book early as the popularity of Shetland as a visitor destination increases.
- The Shetland.org and VisitScotland.com websites were particularly well used by Leisure visitors during the planning process. It is also significant that almost half of those who researched online looked at traveller reviews and ratings. Although social media is used by a minority of Leisure visitors overall (14%) the proportion using it has increased since 2017 (9%). It is also important to note that a quarter of Leisure visitors aged under 55 reported using social media as an information source when planning their trip.
- For half of Leisure visitors their accommodation booking was directly with the provider, although 30% did mention using an online travel or booking agency. There was an increase in accommodation bookings via online travel agencies compared to 2017, when 18% of Leisure visitors used this method. This method of booking was more prevalent amongst overseas visitors.
- Less than one in ten Leisure visitors booked a package including travel and accommodation, with most booking their trip to Shetland independently.

Summary and conclusions

Trip profile



- Almost all visitors to Shetland stayed overnight, with the majority of overnight visitors (81%) staying for a period of one week or less.
- Lerwick, South Mainland and Central Mainland were the most popular areas to visit. The main activities undertaken by Leisure visitors reflect their reasons for visiting Shetland – the majority mentioned visiting beaches/coasts, walking, shopping for arts and crafts and enjoying Shetland’s nature and wildlife. The top attractions visited were Shetland Museum and Archives, Sumburgh Head and Jarlshof.
- For Leisure visitors, a hotel (35%) was the most frequently mentioned type of accommodation, followed by B&Bs (31%) and self-catering (26%). There have been increases in the popularity of both hotels (26% in 2017) and ‘homestay’ accommodation (from 6% in 2017 to 11% in 2019).
- Online sources of information continue to be the primary way of accessing information for Leisure visitors during their trip, although many also mentioned visitor information centres, printed materials (such as local heritage information and brochures) and talking to locals. Compared to 2017, there has been an increase in Leisure visitors using online sources, local heritage information and speaking to local proprietors/staff during their visit.
- Half of Leisure visitors actively engaged with online or social media activity during or after their trip – most commonly to upload photos, update their Facebook status or post a review. This proportion is consistent with the 2017 wave of research.

Summary and conclusions

Evaluation of trip experience



- Shetland continues to attract very high satisfaction ratings from its visitors; similar to 2017, the vast majority provided a positive evaluation of their experience on the islands.
- Interactions with local people was one of the key elements that visitors to the islands enjoyed, with many agreeing that they were made to feel welcome and they experienced excellent customer service. The aspects of their trip which received the highest satisfaction scores were the quality and value for money of visitor attractions, the quality of local arts and crafts products, local information and the quality of local food and drink. The quality of accommodation was also widely regarded as excellent, particularly in terms of staff providing a friendly and efficient service.
- There have been good improvements in the ratings of the availability of free Wi-Fi, mobile phone coverage and the availability of 3G/4G since 2017. Indeed, the majority of visitors in 2019 were satisfied with the extent and quality of digital coverage (Wi-Fi, mobile phone signal, 3G/4G), although compared to other aspects of the trip this remains an area of slightly lower satisfaction.
- The main improvements suggested by visitors were more choice/availability and better quality of food and drink options and better public transport on the islands. Some also mentioned the expense of reaching Shetland and would, therefore, like to see flight and ferry costs reduced.
- Encouragingly, many Leisure and VFR visitors agreed that there is more to Shetland than previously thought (74% agree) and that Shetland is worth visiting more than once (90% agree). Furthermore, when asked to rate their likelihood to return to Shetland for a holiday or short break in the next five years, the average score amongst Leisure visitors was 7.7 out of 10.
- When asked to provide a score out of 10 in terms of their overall satisfaction with their trip to Shetland, the average was 9.1, further demonstrating the very high levels of satisfaction that visitors had with their experience on the islands.



Technical appendix

Technical appendix

Method and sampling



- The data was collected by face-to-face interviews (calibration) and an online survey.
- The target group for this research study was visitors to the Shetland Islands in 2019.
- The target sample size for the calibration interviews was 3,500 and the final achieved sample size was 3,363. The reason for the difference between these two samples was lower than expected response rates at some sampling points.
- The target sample size for the online survey was 630 and the final achieved sample size was 424. The reason for the difference between these two samples was lower than estimated calibration interviews with visitors (estimated – 1750; achieved - 1,572) and lower than estimated percentage providing an email address to participate in the online survey (estimated – 80%; achieved – 57%).
- Fieldwork was undertaken between January and December 2019.
- Respondents were selected using probability random sampling, whereby interviewers selected every nth person passing their pre-selected sampling point.
- Respondents to internet self-completion studies are self-selecting and complete the survey without the assistance of a trained interviewer. This means that Progressive cannot strictly control sampling and in some cases, this can lead to findings skewed towards the views of those motivated to respond to the survey.
- The overall response rate to the survey was 47%.
- Due to the strict random sampling applied, the calibration data is representative of passengers at each sampling point. The data set was weighted to reflect the actual distribution of passengers across sampling points to ensure greater accuracy of results. The online data was skewed to Rest of UK and Leisure visitors and was, therefore, weighted on the basis of visitor type and origin based on the calibration data.
- An incentive of 5 x £100 Amazon vouchers (prize draw competition) encouraged a positive response to the survey.
- In total, 10 interviewers worked on data collection.
- Each interviewer's work is validated as per the requirements of the international standard ISO 20252. Validation was achieved by via close monitoring of the online survey to measure % email addresses collected, % bounce backs and response rate to online survey. All interviewers working on the study were subject to validation of their work.

Technical appendix

Data processing and analysis



- The final data set was weighted to reflect:
 - Calibration – distribution of passengers across the sampling points (airport and ferry terminal)
 - Online – visitor type and origin (based on calibration data)
- Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.
- For **online surveys** these checks include:
 - Responses are checked for duplicates where unidentified responses have been permitted.
 - All responses are checked for completeness and sense.
- For **CAPI Questionnaires** these checks include:
 - Responses are checked to ensure that interviewer and location are identifiable. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact interviewers to check.
- A computer edit of the data carried out prior to analysis involves both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
- Where “other” type questions are used, the responses to these are checked against the parent question for possible up-coding.
- Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
- Data gathered using online surveys are validated using the following technique:
 - Internet surveys using lists use a password system to ensure that duplicate surveys are not submitted. The sample listing is also de-duplicated prior to the survey launch.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.