

Shetland Islands Visitor Survey 2024 – Summary of Leisure Visitors

Introduction

The Shetland Islands Visitor Survey was conducted by Progressive Partnership on behalf of Shetland Islands Council and VisitScotland to enhance understanding of visitor behaviour and experience. The survey was conducted between April and October. In total, 1,356 visitors were interviewed at Sumburgh Airport and Holmsgarth Ferry Terminal, with 950 responding to an online survey on their return home. A further 47 visitors completed the survey by accessing it via a QR code on posters at Sumburgh Airport, Holmsgarth Ferry Terminal and onboard NorthLink ferries.


With the exception of the data relating to visit type and volume and value which covers all visits, this summary report provides data on the profile, experiences and satisfaction of Leisure visitors to Shetland.

Volume and value of visits to Shetland in 2024 (all visits)



Estimated total visits to Shetland in 2024: 89,000
 Average spend per person in peak months (Apr – Oct): £590
 Estimated total value of visitor spend in 2024: £50.3 million


Profile of visitors



Visit Type

Visit Type	Percentage
Leisure	56%
Business	24%
VFR	18%
Other	1%

Base: Stage 1 calibration survey: All visitors 1,356



Leisure visitors

55% UK
 21% Scotland; 34% rest of UK
45% international
 22% Europe; 14% North America;
 8% Australia/New Zealand

Number of people in party

Party Size	Percentage
Solo	4%
Two	18%
3 to 5	22%
6+	56%

Base: Stage 1 calibration survey: Leisure visitors 690

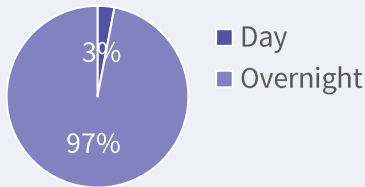
Age

Age Group	Percentage
16-24	3%
25-34	9%
35-44	10%
45-54	13%
55-64	29%
65+	36%

Base: Stage 1 calibration survey: Leisure visitors 690

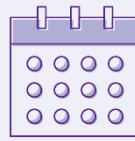
Profile of trip

Day or overnight visitor



Base: Stage 1 calibration survey: Leisure visitors

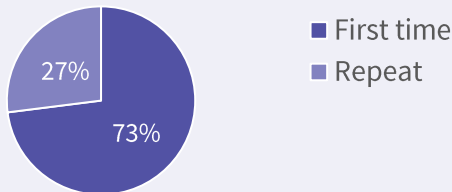
Number of nights



Shetland Leisure visitors stayed on average: 5.9 nights in Shetland

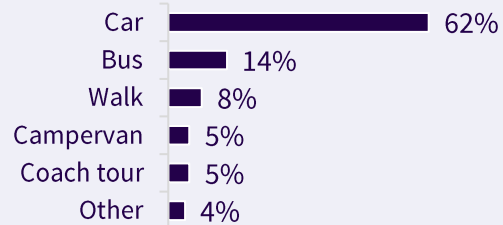
Base: Stage 1 calibration survey: Leisure overnight

First time or repeat visitor



Base: Stage 2 online survey: Leisure visitors 350

Main transport on Shetland



Base: Stage 2 online survey: Leisure visitors 350

Reasons for choosing Shetland

No.	Top 10 reasons for choosing Shetland	Leisure visitors
1	The scenery and landscape	67%
2	Always wanted to visit	65%
3	The wildlife	59%
4	The history, culture and heritage	47%
5	To get away from it all	24%
6	The Vikings history	22%
7	Holidayed in Shetland before and wanted to return	21%
8	Shetland's reputation for friendly people	16%
9	Interest in archaeology	16%
10	To visit a particular attraction	12%
Base: Stage 2 online survey: Leisure visitors		350

No.	Top 10 inspirations for visiting Shetland	Leisure visitors
1	TV programmes featuring Shetland	42%
2	Recommendation from friends or family	41%
3	Online info from www.shetland.org	25%
4	Online info from VisitScotland	24%
5	Info from travel bloggers, influencers, etc.	15%
6	Online info from transport providers	14%
7	Printed travel guidebooks or brochures	14%
8	Book/literature featuring Shetland	12%
9	Online info from tourism businesses	8%
10	Films featuring Shetland	7%
Base: Stage 2 online survey: Leisure visitors		350

Type of accommodation stayed in

55% stayed in serviced accommodation



35%

Hotel, motel, inn



27%

Guest house, B&B



6%

Hostel

Base: Stage 2 online survey: Overnight Leisure visitors 345

Note: serviced and non-serviced adds to more than 100% due to some people staying in more than one accommodation type.

48% stayed in non-serviced accommodation



34%

Self-catering/
commercial non-serviced rentals



10%

Camping, caravan, motorhome

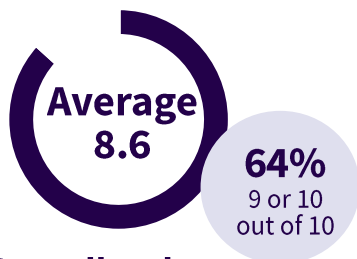


3%

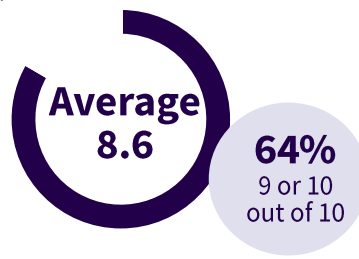
Friend's or relative's home

Satisfaction with accommodation

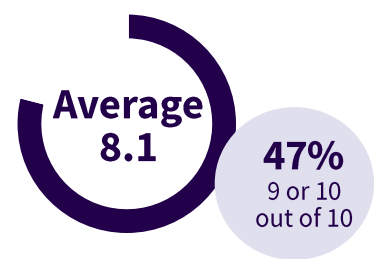
Satisfaction with... (Scored out of 10)



Overall welcome provided to you



Friendly and efficient service



The value for money of accommodation

Base: Stage 2 online survey: Overnight Leisure visitors in paid for accommodation excl. n/a 294-296

Attractions and activities undertaken on Shetland



Top 5 attractions and activities undertaken/visited in Shetland

No.	Top five attractions visited in Shetland	Leisure visitors
1	Sumburgh Head	67%
2	Shetland Museum and Archives	62%
3	St Ninians's Isle and beach	58%
4	An iconic location from the 'Shetland' series	52%
5	Jarlshof	51%
Base: Stage 2 online survey: Leisure visitors		350

No.	Top five activities undertaken in Shetland	Leisure visitors
1	Short and/or long walks	93%
2	Visiting beaches and coasts	79%
3	Shopping for local crafts/products	66%
4	Bird watching	64%
5	Viewpoints/picnic areas	62%
Base: Stage 2 online survey: Leisure visitors		350

Satisfaction with attractions on Shetland

Satisfaction with... (Scored out of 10)

Knowledge and passion of the staff at attractions



Quality of experience at attractions



Value for money of paid for attractions

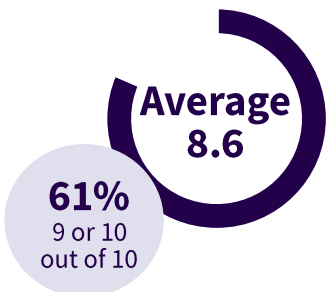


Base: Stage 2 online survey: Leisure/VFR visitors that visited an attraction, excluding 'unsure' 273-295

Satisfaction with food and drink experiences on Shetland

Satisfaction with..... (Scored out of 10)

The service provided by staff



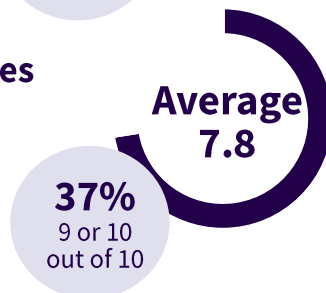
The quality of local food and drink available



Being able to find places serving food when I wanted

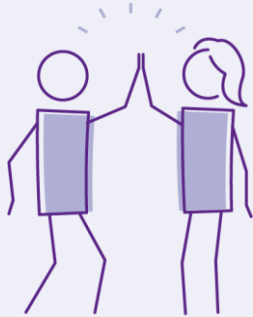


The value for money of dining out



Base: Stage 2 online survey: Leisure visitors excluding 'unsure' 296 - 334

Experiences with local people on Shetland



I was made to feel really welcome

97% agree

The local people I met really added to the holiday experience

92% agree

I experienced excellent customer service

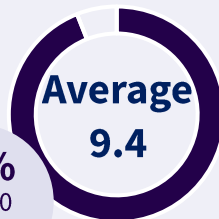
90% agree

Overall experience and likelihood to recommend Shetland

Positive rating of holiday/short break experience



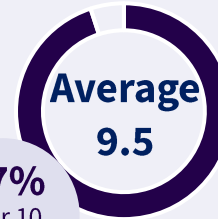
84%
9 or 10
out of 10



Likelihood to recommend as a holiday/short break destination



87%
9 or 10
out of 10



Base: Stage 2 online survey: Leisure visitors excluding 'unsure' 350/349

What visitors said

A small number of comments have been shown to give a flavour of what visitors said. Not all visitors left a comment.

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

The beaches: the beauty of Skaw beach made me cry! The tomolos are remarkable... A very strong emotion when seeing an otter. Hermaness is indescribable: wonderful!

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

The only disappointment was how difficult it was to get a table at a restaurant. We had fish and chips on a bench on our second night and would have preferred a nice restaurant meal.

It was hard to book in advance before we arrived, but we struggled to book for our second and third day from the day we arrived.

From what we saw of people being turned away from restaurants I know we weren't the only ones.

I've visited Shetland many times to see family, there is always a lack of restaurants that have local produce, such as seafood.

Appendix – Interpreting the results

- The data from this survey provides the most representative and robust view of the volume and value of tourism to the Shetland islands as well as an evaluation of the visitor experience.
- The Shetland visitor survey was undertaken between April and October only, based on a need to gather visitor views in an efficient manner. This means the results reflect the views of those of those visiting Shetland between April and October 2024 only.
- The travel operators provided departing passenger numbers for 2024 to be used to assist with the calculation of the volume and value of visitors to Shetland.
 - Volume of passengers: A combination of the proportion of visitors measured by the calibration survey conducted in the peak months (April to October 2024) and an estimation of the proportion of visitors in the off-peak months (January to March, November and December 2024) based on 2019 data (a full 12 months of the survey was conducted in 2019).
 - Value of passengers: Average spend figures, provided in the online survey, have been applied to visitor volume in order to calculate the total value of visits to Shetland in the peak months (April to October 2024). To calculate the value of visits in the off-peak months, the ratio of off peak to peak average spend per person measured in 2019 was applied to the peak months' average spend data in 2024. This provided an estimated average spend figure for the off-peak months. This was applied to off-peak visit numbers in 2024. The average spend in the peak months and off-peak months were combined to provide an estimate of total annual visitor spend for 2024. The sample excluded: cruise ship visitors, people travelling on a private yacht and those in transit to another destination.
- The base size varies across questions, depending on questionnaire routing.
- Both face-to-face and online data were weighted to reflect passenger numbers across Sumburgh Airport and Holmsgarth Ferry Terminal (calibration data) and the profile of visitor type and origin measured in the calibration interviews (online data).

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