Shetland Islands Visitor Survey 2017
Executive Summary
Shetland Islands Council and
VisitScotland
Background and method

- Shetland Islands Council, in partnership with VisitScotland, commissioned Progressive to conduct a visitor survey on the Shetland Islands to provide robust and up-to-date estimates of visitor volume and value, as well as information on experiences, motivations, behaviours and perceptions.

- The research data was gathered using a 2 stage approach:
  - Stage 1 – Calibration interviews conducted face-to-face with visitors at key exit points from the islands – ferry terminals and airport
  - Stage 2 – Follow-up online survey to gather more detailed feedback

- Stage 1 - Calibration Interviews
  - In total, 5,088 calibration interviews were completed – 2,434 visitors; 2,571 island residents; 83 other

- Stage 2 - Online Survey
  - Respondents were asked if they would like to take part in an online survey at the end of the calibration interview.
  - In total, 1,839 online survey invites were sent.
  - The final sample response was 854 completed online surveys (46% response rate).

- Calibration data was weighted to reflect the distribution of passengers at each airport/ferry terminal. Online data was weighted to reflect the profile of the calibration survey in terms of country of origin and trip type.
Profile of visitors to Shetland

**Gender of Visitors**
- 61% Male
- 39% Female

**Origin of Visitors**
- 45% Scotland
- 32% Rest of UK
- 14% Europe
- 4% North America
- 5% Other Overseas

**Age of Visitors**
- 21% 16-34
- 13% 35-44
- 23% 45-54
- 23% 55-64
- 20% 65+

**Purpose of Visit**
- 51% Leisure/holiday
- 11% Visiting friends/relatives
- 35% Business

**Been before?**
- 46% First time
- 53% Repeat visitor
Profile of leisure visitors

Leisure Visitors
51% of all visitors

Origin
30% Scotland
37% Rest of UK
19% Europe
8% North America
7% Other Overseas

Gender
48% - Male
52% - Female

Age
18% - 16-34
8% - 35-44
19% - 45-54
24% - 55-64
30% - 65+

Been before?
64% First time
36% Repeat visitor

Base (Age, gender, origin, purpose): All calibration visitors – 1,329
Base (been before?): All online respondents – 551
Profile of VFR visitors

- **Visiting Friends or Relatives (VFR)**: 11% of all visitors

- **Origin**:
  - 54% Scotland
  - 35% Rest of UK
  - 6% Europe
  - 2% North America
  - 4% Other overseas

- **Gender**:
  - 42% - Male
  - 58% - Female

- **Age**:
  - 25% - 16-34
  - 15% - 35-44
  - 19% - 45-54
  - 20% - 55-64
  - 21% - 65+

- ** Been before?**
  - 18% First time
  - 82% Repeat visitor

Base (Age, gender, origin, purpose): All calibration visitors – 243
Base (been before?): All online respondents – 105
Profile of business visitors

Business Visitors
35% of all visitors

Origin
65% Scotland
24% Rest of UK
9% Europe
1% Other overseas

Gender
85% - Male
15% - Female

Been before?
27% First time
73% Repeat visitor

Age
22% - 16-34
20% - 35-44
30% - 45-54
23% - 55-64
4% - 65+

Base (Age, gender, origin, purpose): All calibration visitors – 796
Base (been before?): All online respondents – 169
Planning a trip to Shetland

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

How far in advance did you plan your trip?

<table>
<thead>
<tr>
<th>Duration</th>
<th>All visitors</th>
<th>Business</th>
<th>VFR</th>
<th>Leisure</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than 2 years</td>
<td>1%</td>
<td>1%</td>
<td>4%</td>
<td>0%</td>
</tr>
<tr>
<td>1 - 2 years</td>
<td>4%</td>
<td>6%</td>
<td>6%</td>
<td>1%</td>
</tr>
<tr>
<td>6 - 12 months</td>
<td>19%</td>
<td>6%</td>
<td>12%</td>
<td>21%</td>
</tr>
<tr>
<td>3 - 6 months</td>
<td>29%</td>
<td>12%</td>
<td>29%</td>
<td>35%</td>
</tr>
<tr>
<td>1 - 2 months</td>
<td>17%</td>
<td>15%</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>2 - 4 weeks</td>
<td>15%</td>
<td>6%</td>
<td>12%</td>
<td>31%</td>
</tr>
<tr>
<td>Less than 2 weeks</td>
<td>15%</td>
<td>6%</td>
<td>16%</td>
<td>29%</td>
</tr>
<tr>
<td>Unsure</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Base (All): All 825; Leisure 551; VFR 105; Business 169
Motivations to visit Shetland
Leisure visitors only

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

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

Key Reasons for Visiting Shetland

- Scenery and landscape – 57%
- Always wanted to visit – 50%
- History and culture – 33%

Inspiration for Visiting Shetland

- TV programme – 28%
- Travel feature in a newspaper/mag – 15%
- A book about Shetland – 15%
Information used to plan the visit
Leisure visitors only

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

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

Sources Used During Planning

- Websites – 68%
- Talking with friends/family – 41%
- Printed travel guide books – 23%
Online information
Leisure visitors only

68% used websites when planning visit

Websites used during planning (top responses)

- Google search engine: 82%
- www.shetland.org: 64%
- Transport provider website: 51%
- www.VisitScotland.com: 41%
- Traveller review websites: 32%
- Tourism business provider’s website: 14%
- Other website: 10%
- Social media: 9%

Online information used during planning (top responses)

- Official tourist websites: 63%
- Traveller submitted reviews/ratings: 41%
- Interactive maps displaying accom/attractions: 24%
- Professional photos: 22%
- Traveller submitted photos: 19%
- Professional reviews/ratings: 11%
- Comments on online social network: 11%

Base (Leisure who used online info): 377
Trip profile
All visitors

Type of trip
93% - Overnight
7% - Day visit

Areas visited (top 5)
92% - Lerwick
63% - South Mainland
57% - Central Mainland
46% - North Mainland
45% - West Mainland

No. of nights (overnight visitors only)
Average nights Shetland – 7.6

No. of people in party
43% - One
36% - Two
13% - 3 to 5
8% - 6+

Transport during visit
70% - Car
7% - Bus
6% - Walked

Accommodation
34% - Hotel
20% - B&B/Guest house
19% - Self-catering

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

Type of trip
97% - Overnight
3% - Day visit

No. of nights (overnight visitors only)
Average nights Shetland – 6.6

Areas visited (top 5)
98% - Lerwick
79% - South Mainland
71% - Central Mainland
60% - West Mainland
55% - North Mainland

Transport during visit
63% - Car
9% - Bus
7% - Walked
7% - Coach tour

Accommodation
27% - B&B/Guest house
26% - Hotel
23% - Self-catering

No. of people in party
25% - One
48% - Two
15% - 3 to 5
11% - 6+

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

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

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

Almost half of Leisure visitors actively engaged with online or social media activity during or after their trip – most commonly to upload photos and update their Facebook status.

Sources of Information Used During Trip

- Websites – 70%
- Visitor info centres – 53%
- Asking locals – 42%
- VS brochures – 40%
Evaluation of visitor experience
All visitors

Interactions with local people were a particular highlight for many visitors – most agreed they were made to feel welcome, the local people really added to their trip and they experienced excellent customer service.

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

- Made to feel welcome – 96% agreed
- Local people really added to the experience – 90% agreed
- I experienced excellent customer service – 87% agreed
- VFM of visitor attractions – 78% (rated 8 or more out of 10)
- Quality of visitor attractions – 82%
- Quality of local arts and crafts – 77% (rated 8 or more out of 10)
Potential improvements

All visitors

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

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

Rating of digital coverage

- Availability of free Wi-Fi – 35% (rated it less than 5)
- Mobile phone signal coverage – 43% (rated it less than 5)
- Availability of 3G / 4G – 54% (rated it less than 5)

Suggested improvements

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

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

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

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

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

84% of Leisure visitors were ‘very satisfied’ with their trip to Shetland.
Volume and value of visitors

73,262 total visits in 2017

Leisure 38,096
VFR 8,791
Business 26,374

Total value of visits: £23.21 million

VFR £1.7M
Leisure £13.1M
Business £8.5M

Ave. spend per person on Shetland - £317

Leisure £343
VFR £191
Business £320

Base (All who provided spend data): Total 582; Leisure 404; VFR 74; Business 104
Technical appendix
The data was collected by face-to-face interviews (calibration) and an online survey. The target group for this research study was visitors to the Shetland Isles in 2017. The target sample size for the calibration interviews was 1,880 and the final achieved sample size was 2,434. The reason for the difference between these two samples was better than expected response rates at some sampling points. The target sample size for the online survey was 500 and the final achieved sample size was 854. The reason for the difference between these two samples was better than expected response rates for the calibration and online surveys. Fieldwork was undertaken between January and December 2017. Respondents were selected using probability random sampling, whereby interviewers selected every nth person passing their pre-selected sampling point. Respondents to internet self-completion studies are self-selecting and complete the survey without the assistance of a trained interviewer. This means that Progressive cannot strictly control sampling and in some cases, this can lead to findings skewed towards the views of those motivated to respond to the survey. The overall response rate to the survey was 46%. Due to the strict random sampling applied, the calibration data is representative of passengers at each sampling point. The data set was weighted to reflect the actual distribution of passengers across sampling points to ensure greater accuracy of results. The online data was skewed to Leisure visitors and was, therefore, weighted on the basis of visitor type and origin based on the calibration data. An incentive of 5 x £100 Amazon vouchers (prize draw competition) encouraged a positive response to the survey. In total, 6 interviewers worked on data collection. Each interviewer’s work is validated as per the requirements of the international standard ISO 20252. Validation was achieved by re-contacting (by telephone or email) a minimum of 10% of the sample to check profiling details and to re-ask key questions from the survey. Where telephone details were not available re-contact may have been made by post. All interviewers working on the study were subject to validation of their work.
The final data set was weighted to reflect:
- Calibration – distribution of passengers across the sampling points (airports and ferry terminals)
- Online – visitor type and origin (based on calibration data)

The calibration sample base before weighting is 2,434 whilst the weighted sample base is 2,409.
- The overall calibration sample size of 2,434 provides a dataset with a margin of error of between ±0.39% and ±1.95%, calculated at the 95% confidence level (market research industry standard).

The online sample base before weighting is 854, whilst the weighted sample base is 860.
- The overall online sample size of 854 provides a dataset with a margin of error of between ±0.66% and ±3.33%, calculated at the 95% confidence level (market research industry standard).

Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.
- For **online surveys** these checks include:
  - Responses are checked for duplicates where unidentified responses have been permitted.
  - All responses are checked for completeness and sense.
  - Depending on the requirements of the survey, and using our analysis package SNAP, data is either imported from email responses received in a dedicated email inbox or stored directly on our dedicated server.

- For **CAPI Questionnaires** these checks include:
  - Responses are checked to ensure that interviewer and location are identifiable. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact interviewers to check.
  - Using our analysis package SNAP, data received via over-the-air synchronisation is imported from our dedicated server.
Technical appendix
Data processing and analysis

• A computer edit of the data carried out prior to analysis involves both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
• Where “other” type questions are used, the responses to these are checked against the parent question for possible up-coding.
• Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
• A SNAP programme set up with the aim of providing the client with useable and comprehensive data. Crossbreaks are discussed with the client in order to ensure that all information needs are met.

• Data gathered using online surveys are validated using the following technique:
  • Internet surveys using lists use a password system to ensure that duplicate surveys are not submitted. The sample listing is also de-duplicated prior to the survey launch.

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