Scotinform

SHETLAND VISITOR SURVEY 2012/13

RESEARCH RESULTS – FINAL REPORT

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Market Research
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INVESTOR IN PEOPLE

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EXECUTIVE SUMMARY

1. Research Background

The 2012/13 Shetland visitor research was commissioned by Shetland Islands Council, Orkney Islands Council, Comhairle nan Eilean Siar, Highlands and Islands Enterprise and VisitScotland in order to provide data on the profile of visitors; assess views on their visit experience; and measure the economic impact of visits to each island.

The research was carried out using three methods:

> **Face-to-face exit interviews:** 1,259 interviews were completed with visitors as they departed from Sumburgh airport or Holmsgarth ferry terminal. The interviews were completed between October 2012 and September 2013, with the number of interviews per month based on historical passenger data. The questionnaire gathered data on the visitors' demographics, the main activities undertaken on Shetland and the trip expenditure.
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> **Online survey:** the link to an online questionnaire was emailed to respondents who had provided email addresses in the exit interviews. This questionnaire allowed a wider range of topics to be addressed than in the face-to-face interviews, with visitors asked about the details of their trip and levels of satisfaction with different elements of their visit. A total of 368 responses were received from visitors to Shetland.
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> **Calibration survey:** this survey collected data on all passengers (both visitors and residents), and was used to calibrate the passenger data provided by transport operators so that accurate estimates of total visitor spend could be made. A total of 5,712 face-to-face calibration interviews were completed from October 2012 to September 2013, with departing passengers asked their normal place of residence and, if not resident on Shetland, their type of visit and group size.

The analysis of the data from the face-to-face exit interviews and online survey provides robust findings on visitors to Shetland which are compared with the findings from the surveys for Orkney and the Outer Hebrides and with previous visitor surveys for Shetland (2000 and 2005/2006).

The volume and value of tourism to Shetland was calculated using the data from the calibration survey, passenger data from the relevant transport providers and expenditure per trip data from the face-to-face visitor survey. The economic impact of visits has been compared with estimates from a previous survey in 2005-2006.

2. Impact of Visitors

Visit numbers have increased from approximately 60,000 in 2006 to 65,000 in 2013, with the main growth coming from air passengers. The two main visit types are holiday and business visitors, both of whom account for 41% of visitors to Shetland, with those visiting friends and relatives (VFR) accounting for the remaining 18%. Business visitors show the highest increase: there were 4,400 more business visitors in 2013 than in 2006 compared to 2,000 more holiday visitors. By contrast VFR visitors showed a decrease of around 1,600. Air accounts for most (over 60%) of both business and VFR passengers, whilst the majority of holiday visitors travel by ferry.

The average spend per trip on Shetland was £251, down by £4 since 2006 due to a fall in spending on food, drink and shopping. Expenditure by business visitors has increased since 2006: this group now spends an average of £279 per trip. By comparison holiday and VFR visitors' expenditure per trip has fallen to £258 and £169 respectively. The results suggest that approximately 6% of visitor expenditure is on local products and produce.

The value of visitors to Shetland for 2012-2013 was £16 million, representing a decrease of over £2 million compared to the inflation adjusted figure for 2006. There has been a significant increase in spend by business visitors, but a decrease in spend by holiday and VFR visitors.

The contribution of Scottish visitors to the Shetland economy was over £6 million, whilst visitors from elsewhere in the UK contributed over £5 million and overseas visitors accounted for £4 million.

3. Types of Visitor

3.1 Shetland

Looking at all visits, overnight and day trips, there was a high proportion of business related trips to Shetland: 42% of visitors were on business-related visits, compared with 35% on holiday and 20% VFR. The type of visit differed significantly at different times of the year: business visitors accounted for around half of all visitors between October to December and April to June, whilst the proportion of holiday visitors was highest between July to September.

3.2 Comparisons with other islands

Comparing the results with the other islands, shows that the proportion of types of visitors to Orkney and the Outer Hebrides is similar, whilst Shetland has a much higher proportion of business visitors (42%) than the other islands (Orkney: 25%, the Outer Hebrides: 26%) and consequently a lower proportion of holiday and VFR visitors.

4. Visitor Profile

4.1 Shetland

Visitors were more likely to be male (60%) than female (40%). The relatively high proportion of males relates to the high percentage of visitors whose main purpose is business: 81% of business visitors were male.

Visitors to Shetland were likely to be aged over 45 years old, and there were a low proportion of visitors in the younger (under 24 year old) age groups. The age profile of different visitor types varied significantly, however, with holiday visitors much more likely than average to be aged over 65 years old (30%) and business visitors most likely to aged between 25-54 years old.

Half the visitors were Scottish residents, with VFR and business visitors more likely than average to be from Scotland. One third of visitors were from the rest of the UK/Ireland: this was the main area of residence for holiday visitors. In total, 19% of visitors were from Europe or elsewhere in the world, with almost a third of holiday visitors from overseas.

The social grade of visitors showed a high proportion in higher income brackets, with 49% of visitors classified as ABs, the top two social grades, and only 6% classified as DEs. Holiday visitors were more likely than average to be ABs, whilst business visitors were more likely than average to be in the C1C2 social grade, for instance 30% of business respondents were working in the oil and gas industry with transport and construction other common industries worked in.

Over half the visitors (53%) were visiting on their own: this reflects a very high proportion of business people on solo trips. A fifth of visitors were travelling with their partner/spouse, with holiday visitors and VFR most likely to be travelling as part of a couple.

4.2 Comparisons with other islands
Comparisons with the visitor profiles across the three islands showed that the gender profile of visitors to Orkney is similar to that for the Outer Hebrides, but that Shetland has a higher proportion of males, reflecting its percentage of business visitors. The age profile for the three islands was similar. Visitors to the Outer Hebrides included a higher than average proportion of Scottish residents, whilst Orkney had higher proportions of overseas visitors than the other islands. The Outer Hebrides and Orkney had similar socio-economic profiles, with around 61% of visitors in the AB social grade: this compares with Shetland where just less than half the visitors were in these social grades. Travelling alone or with a partner/spouse was the most common type of group on all three islands, though the balance between the two varied by island, with travelling alone most common on Shetland and with a partner/spouse most common on the Outer Hebrides.

5. Profile of Visits
5.1 Shetland
Just over half of the visitors to Shetland were holiday or VFR visitors staying overnight and amongst those staying overnight, one fifth were on their main holiday. Only 3% of holiday/VFR visitors were on a day trip, with almost all saying they were on an independent day trip rather than a guided tour/package.

Although 40% of all visitors were on a first time visit to Shetland, the proportion was much higher amongst holiday visitors (60%) than VFR (21%) or business visitors (32%).

The average length of stay in Shetland was 10.1 nights out of a total of 11.7 nights away from home during the trip. Business visitors spent an average of 14.1 nights on Shetland, reflecting the fact that some business respondents were staying for extended periods of time. Holiday visitors were spending an average of 6.9 nights and VFR an average of 9.4 nights.

Four fifths of visitors were travelling home after their trip to Shetland, with VFR and business visitors more likely than holiday visitors to be going straight home. 15% of visitors were travelling elsewhere in Scotland: over one in four holiday visitors were travelling elsewhere in Scotland compared with less than 10% of VFR and business visitors.

5.2 Comparisons with other islands
The proportion of first time visitors varied across the three islands, from 37% in the Outer Hebrides to 40% in Shetland and 49% in Orkney. On all three islands holiday visitors were more likely than other visitor types to be first time visitors: on Orkney and Shetland approximately 60% of holiday visitors were first time visitors, whereas in the Outer Hebrides the proportion was 53%.

6. Planning the Visit
6.1 Shetland
Nearly a quarter of holiday and VFR visitors had considered a visit to Orkney when planning their trip to Shetland and one in ten said they had considered a trip to the Outer Hebrides.

The main influence on their decision to visit Shetland was an interest in the island's scenery and landscape, followed by having visited the island previously, being interested in archaeology and having family connections with the area. For visitors from outside Scotland, the main influence was the scenery/landscape; but for Scottish visitors, family connections and previous visits were the main factors.

Nearly half of visitors had planned their trip more than 3 months in advance (mainly holiday visitors), with 31% saying they had planned it in the last month (mostly business visitors). The actual booking of the trip showed a similar pattern to planning, with the notable exception that nearly one in ten visitors (businesses and VFR) did not book in advance.

Satisfaction with planning travel to Shetland was high: 51% of visitors said they were very satisfied with 'getting to Shetland' and a further 35% said they were quite satisfied. Holiday visitors expressed particularly high levels of satisfaction (67% very satisfied). Visitors were more likely to be positive about the availability of convenient sea routes than about the availability of convenient air routes: nearly one in five of those who rated air routes were not satisfied with availability and comments highlighted a lack of direct flights to Shetland, inconvenient flight times, fully booked flights and high costs

6.2 Comparisons with other islands

For the Outer Hebrides and Shetland the main influence for the visit was an interest in scenery/landscape, whereas in Orkney the main reason was an interest in archaeology/history (scenery/landscape was the second most important reason).

In all three islands, around a third of holiday and VFR visitors started to plan their trip 3-6 months in advance whilst business visitors were very unlikely to plan their trip more than a month in advance (70% of business visitors planned their trip within four weeks of departure).

There were high levels of satisfaction with getting to the islands amongst visitors to all three islands. The results were also similar for satisfaction with availability of convenient air and sea routes: visitors had much higher levels of satisfaction with sea routes than with air routes: this particularly affected the satisfaction of business visitors who were more likely than average to travel by air.

7. Sources of Information Pre-Visit

7.1 Shetland

Internet/websites were the most common source of pre-visit information, mentioned by seven out of ten visitors. Visitors were also likely to get advice from friends/relatives, refer to Tourist Board brochures and look at guidebooks. There were some key differences by visit type:

- holiday visitors were much more likely than average to look for information online and had above average usage of Tourist Board brochures, guidebooks and Visitor Information Centres

- VFR relied heavily on advice from friends and relatives, but were also likely to refer to the internet

- business visitors were less likely than average to refer to any source, but if they did so it was likely to be the internet

The main information sought from the internet related to accommodation, mentioned by two thirds of visitors who had sought information online. Other key topics were history/culture, visitor attractions, natural history and activities.

In terms of online booking, approximately half of those who had looked for information online had booked accommodation and a fifth had booked transport to Shetland.

Satisfaction with the information available online was reasonably high: 44% of those who had accessed online information were very satisfied with what was available and the same percentage were quite satisfied. Ratings for offline information were lower, with 31% of those who had looked for offline information when planning their trip saying they were very satisfied and 41% saying they were quite satisfied. The reasons for being dissatisfied with availability of offline information highlighted a lack of information from travel agents/airlines/tourist information.

7.2 Comparisons with other islands

Sources of pre-visit information did not vary significantly across the three islands, with the key driver being the visit type rather than the location. The internet/websites were the most popular source of pre-visit information for holiday and business visitors, with VFR more likely to rely on advice from friends/relatives. Holiday visitors were likely to refer to a range of sources, including the Tourist Board brochures and guidebooks whilst other visitor types were much less likely than holiday visitors to look at anything other than the Internet.

8. Source of Information during Visit

8.1 Shetland

The main sources of information during visits were asking local people (42%), using a smartphone/internet on a mobile phone (34%), visiting a Visitor Information Centre (32%), using a laptop (31%) or looking at leaflets (28%) or brochures (27%). Holiday visitors were much more likely than VFR or business visitors to source information during their visit: most notably approximately half had visited a Visitor Information Centre and 40% had referred to a brochure.

8.2 Comparisons with other islands

The key sources of information during their visit were the same for all three islands: as with pre-visit information the key differences were by visit type rather than island. Holiday visitors referred to the widest range of sources, with Visitor Information Centres the most important source in all three islands. The likelihood of using smartphone/internet mobile was the same across the three islands, but Orkney holiday visitors were more likely than visitors to other islands to refer to brochures (e.g. VisitScotland) or local heritage information leaflets.

9. Communication

9.1 Shetland

During their trip to Shetland, 43% of visitors had communicated about their visit on social media: the main activity was uploading photos or updating their status on Facebook. There was a clear difference in age-groups with younger respondents much more likely than older respondents to post pictures from their visit online and update their Facebook status whilst on their visit.

Satisfaction with mobile phone reception was quite low: only 20% of visitors were very satisfied with reception and nearly 30% were very or fairly dissatisfied. The highest levels of dissatisfaction were amongst business visitors and VFR. The main reason for dissatisfaction was the 'patchy' phone connection.

Satisfaction with the availability of WiFi/broadband was also low, with only 20% of visitors very satisfied and 16% very or fairly dissatisfied. Availability of broadband was a particular issue for business visitors who expressed dissatisfaction with the limited access to WiFi and the slowness of connections.

It should be noted that this is not just an island issue as satisfaction with mobile phone reception and WiFi was also an area of lower satisfaction in the most recent Scotland-wide VisitScotland visitor survey.

9.2 Comparisons with other islands
Approximately 40% of visitors on each island had used social media during their visit, with a third uploading photos and between a quarter to a third updating Facebook. In the Outer Hebrides and Shetland VFR visitors were more likely than average to use Facebook.

Satisfaction with mobile phone reception and WiFi was not very high in any of the islands, but it was lower in the Outer Hebrides than in Orkney or Shetland. Holiday respondents were generally more satisfied than other visitor types with mobile phone reception on Orkney and Shetland, whilst on the Outer Hebrides, the visitor types showed similar levels of satisfaction with communication.

10. Transport

10.1 Shetland
90% of visitors had used the same mode of transport for arrival and departure, with one in ten using different methods for arrival and departure.

Satisfaction with Holmsgarth ferry terminal was high: 71% of passengers were very satisfied with the facilities and services. By contrast, only 42% of visitors using Sumburgh airport were very satisfied with its facilities and services: the main reasons for dissatisfaction were the feeling it was 'dilapidated' and the poor quality of food and drink outlets.

Car, whether privately owned or hired, was the main form of transport used during the visit, with walking the most likely form of other transport.

There were low levels of satisfaction with the cost of travel to Shetland, particularly amongst business and VFR visitors. The main reason for dissatisfaction with the costs of travel to Shetland was the price of flights, particularly compared with the costs of flying to Europe. Satisfaction with the cost of travel in Shetland was higher than satisfaction with the cost of travel to Shetland, but business and VFR visitors were again more likely than holiday visitors to be dissatisfied with the cost of travel within Shetland. The high cost of ferries and car hire were the key issues for the costs of travel in Shetland.

Satisfaction with the availability of public transport was lowest amongst VFR visitors, with comments highlighting issues with the frequency of buses and poor links to the airport/ferry terminals/villages.

Visitors were reasonably satisfied with the value for money of public transport, with 39% saying they were very satisfied and 37% saying they were quite satisfied.

10.2 Comparisons with other islands
The main forms of transport were fairly consistent across the three islands. Car was the most popular form of transport, with visitors to the Outer Hebrides more likely than those to Shetland and Orkney to use a car during their visit. Hiring a car was more common for holiday visitors in Shetland than in Orkney or the Outer Hebrides and the use of regular bus services was much lower on the Outer Hebrides than on the other two islands. Comments from respondents on the Outer Hebrides suggest that availability of public transport, especially in the evenings, are an issue for visitors.

In all three areas, the highest level of satisfaction with travel was for the quality of public transport, although levels of satisfaction with this aspect were highest in Orkney and lowest in Shetland. There were also relatively high levels of satisfaction with the value for money of public transport in all three areas, but visitors to the Outer Hebrides were less satisfied than other islands with the availability and cost of public transport: this may explain their below average usage. Satisfaction with the cost of travel to the islands was highest amongst visitors to Shetland and lowest for the Outer Hebrides, with holiday visitors most satisfied with the cost in all three islands.

11. Accommodation

11.1 Shetland

Hotels, mainly 3 star, were the most popular type of accommodation with around a third of visitors staying in hotels during their stay. The next most popular accommodation types were staying with friends/family, guest house/B&B and self-catering. The use of accommodation varied significantly by type of visitors:

- approximately a quarter of holiday visitors stayed in a hotel, followed by around one in five staying in guest house/B&B and the same proportion using self-catering. Holiday visitors were the main users of hostels and camping bods: just under one in ten stayed in each of these types of accommodation.

- the main type of accommodation for VFR visitors was, not surprisingly, staying with friends and relatives: three quarters of VFR used this type of accommodation. The other main types used by VFR visitors were guest house/B&B or self-catering, with approximately one in ten visitors staying in each of these types of accommodation.

- business visitors were most likely to stay in hotels, with approximately 40% staying in 3 star hotels. One in five stayed in workers' accommodation on-site (e.g. rigs) and 14% stayed in guest houses/B&Bs.

The most likely method of booking accommodation was through direct contact with the provider by email or phone.

90% of visitors staying overnight in paid for accommodation said the type and quality of accommodation they wanted was available when they booked. Satisfaction with the actual experience of staying in accommodation was varied. Most notably, a fifth of business visitors were dissatisfied with the quality and value for money of the accommodation they stayed in. There was, however, a high level of satisfaction across all visitor types with the quality of service they had experienced. Reasons for being dissatisfied with the quality of accommodation focussed on issues with accommodation being 'shabby' and out of date.

11.2 Comparisons with other islands

Hotels were the most popular type of accommodation for holiday and business visitors across all three islands, used by approximately 30% of visitors. Usage of guest houses/B&Bs was also similar amongst holiday visitors, with those visiting the Outer Hebrides more likely than other visitors to use this type of accommodation. Between a fifth and a quarter of visitors used self-catering accommodation and one in ten holiday visitors on Shetland and Orkney used hostels (5% on the Outer Hebrides). The most noticeable difference was the high use of workers accommodation on Orkney (15%) and Shetland (20%), compared with the Outer Hebrides (2%).

Satisfaction with accommodation showed a similar pattern for the three islands: there were generally high levels of satisfaction with service, quality and value for money, but business visitors were much less satisfied than other visitor types with all aspects of their accommodation. Business visitors to Shetland had notably lower levels of satisfaction with accommodation than on the other islands.

12. Activities during Visit

12.1 Shetland

Overall, Shetland Museum and Archives (57%) was the attraction most likely to be visited, followed by RSPB Sumburgh Head Reserve (34%), St Ninian's Isle (33%), Jarlshof (31%) and Scalloway Castle (31%).

Pre-visit awareness of the Shetland visitor attractions was generally much higher than the likelihood of visiting. Two notable exceptions were the Shetland Museum and Archives and, to a lesser extent Mareel, both located in Lerwick. Comparison of pre-visit awareness and visit rates to these attractions highlighted a proportion of visitors who only became aware of them *during* their visit to Shetland.

Visitor attractions were more popular with holiday visitors than other visitor types. Business visitors were unlikely to visit attractions except for Shetland Museum and Archive.

The most likely activities for visitors were walks (both long and short), visiting beaches/coastal scenery, shopping for local craft/produce, trying local food, bird watching and visiting archaeological and nature/wildlife sites. As with visitor attractions, holiday visitors were most likely to undertake activities during their visit.

12.2 Comparisons with other islands

Beaches/coastal scenery was the key activity for visitors to all three islands, and was particularly important for visitors to the Outer Hebrides. In Orkney visitors were as likely to visit archaeological sites as visit beaches/coasts and in Shetland visitors were as likely to go on a short walk. Trying local food was important in all three areas, with visitors more likely to have done this in Orkney and the Outer Hebrides than in Shetland, where shopping for local crafts/products was more popular.

13. Satisfaction with Visit

13.1 Shetland

Visitors' overall satisfaction with their visit was very high: 79% were very satisfied and a further 18% were fairly satisfied, giving a total 97% of visitors stating that they were very or fairly satisfied. Satisfaction amongst holiday and VFR visitors was particularly high (over 90% very satisfied). Business visitors, however, expressed lower than average satisfaction with their visit (64% very satisfied). Comments from visitors highlighted that the main reasons for dissatisfaction were the costs of transport, food and accommodation, the limited opening times/lack of cafes/restaurants, the quality of accommodation, the floating hotels and lack of tourist information.

For over two-fifths of visitors their visit to Shetland had exceeded their expectations, whilst half felt their expectations had been met. Business visitors were more likely than average to feel that the visit had not met their expectations, confirming their slightly lower than average levels of satisfaction with the overall visit.

Highlights of visits to Shetland were the scenery and wildlife, festivals/events and the visitor attractions.

Comments from visitors on areas for improvement highlighted travel costs as a key issue for all visitors, with holiday and business visitors also suggesting improving the quality of accommodation.

13.2 Comparisons with other islands

Overall visit satisfaction was very high for all three islands: on each island, 90% or more of holiday and VFR visitors were very satisfied with their visit. Business visitors expressed lower levels of satisfaction, with between 76% (Orkney) and 64% (Shetland) of business visitors saying they were very satisfied.

14. Comparisons with Previous Visitor Surveys

The demographic profile of visitors remains similar to previous visitor surveys (2000 and 2005/2006), with visitors:

- predominantly male (60%) - reflecting the high proportion of business visitors
- aged 25-55 years old
- more likely than in previous surveys to be from Scotland and less likely to be from overseas
- much more likely to in the AB socio economic group (49% in 2013 compared to 27% in 2006)

Underlying these demographic changes is a decline in the proportion of holiday visitors and an increase in the proportion of business visitors. This has led to the changes in the visitor profile and an increase in visitors travelling on their own.

The proportion of first time visitors has declined compared with previous surveys (from 51% to 40%), with holiday visitors now much less likely to be first time visitors.

The average length of trip has increased, with the number of nights spent on Shetland increasing from 5.8 nights in 2009 to 10.1 nights in 2013. Although all visitor types had increased their length of stay, the most significant change was for business visitors: their length of stay had more than doubled.

Lerwick remains the most popular area for visitors, followed by North and South Mainland. The type of accommodation used by visitors has not shown a significant change since 2006, although the results suggest a trend away from hotels and towards guest houses/B&Bs and self-catering.

The visit to Shetland exceeded the expectations of 41% of visitors in 2013, with no significant change since 2006. Business visitors were much less likely than in previous years to think that their expectations had been exceeded (16% in 2013 compared to 30% in 2006), reflecting the generally lower satisfaction of this group of visitors.

1. INTRODUCTION AND OBJECTIVES

1.1 Introduction

This research, which took place between October 2012 and September 2013, was commissioned by a partnership of Shetland Islands Council, Orkney Islands Council, Comhairle nan Eilean Siar, Highlands and Islands Enterprise and VisitScotland. The partners identified a common need to understand the profile and experiences of visitors to Shetland, Orkney and the Outer Hebrides. The research builds on previous studies undertaken in each of these island groups and focused on the profile of visitors (both overnight and day visitors), visitor views on their experience and levels of expenditure. The research results will inform on-going tourism policies at a local and national level. This report presents findings from research conducted on Shetland.

1.2 Research Objectives

Specific objectives included:

- provide data on the profile of visitors
- identify the key drivers in decisions to visit
- understand visitor behaviour during visits
- assess visitors' satisfaction with their experience
- identify areas for development/improvement in products and services
- identify areas of commonality and differences with the other islands
- assess the likelihood of returning and/or recommending a visit
- provide data required for the assessment of the volume and economic value of visitors

2. METHODOLOGY AND SAMPLE

The project involved three separate surveys:

1. A face-to-face exit survey of visitors to Shetland
2. A post-visit online survey emailed to respondents
3. A face-to-face calibration survey of visitors to inform volume and value estimates

Each of these methodologies is explained below.

2.1 Face-to-Face Exit Survey

2.1.1 Methodology for face-to-face survey

The face-to-face exit survey involved interviews with 1,259 respondents (defined as non-residents or not in transit)[1]. The interviews were spread across a twelve month period (October 2012 – September 2013) according to an interview schedule based on historical passenger data. Table 2.1 displays the number of interviews conducted during each month of the research.

Table 2.1: Number of face-to-face interviews per month

Month	No. of interviews
October 2012	66
November	53
December	34
January	63
February	72
March	39
April	120
May	128
June	159
July	184
August	220
September 2013	121
TOTAL	**1,259**

Table 2.2 highlights that interviews took place on a range of days.

Table 2.2: Days of week for face-to-face interviews

Day	No. of interviews
Monday	191
Tuesday	278
Wednesday	225
Thursday	183
Friday	178
Saturday	95
Sunday	109
TOTAL	**1,259**

[1] The research also excluded people who spent the majority of their visit on a yacht.

Passengers visiting on cruises and yachts were excluded from the research.[2] The interviews were conducted when visitors were exiting Shetland at the following locations:

Table 2.3: Locations and number of face-to-face interviews

Location	No. of interviews
Sumburgh airport	659
Holmsgarth ferry	600
TOTAL	**1,259**

A similar number of interviews were conducted on Orkney (1328) and the Outer Hebrides (1262) ensuring comparability of results.

The face-to-face exit survey questionnaire (see appendix one) concentrated on collecting key demographic details from respondents as well as gathering information on what respondents had done during their visit and how much they had spent. The questionnaire focussed on these areas as this information is best collected at the time of visit when respondent recall is more accurate.

Scotinform trained local residents to complete the face-to-face interviews. This training ensured all interviews were completed in accordance with the Market Research Society Code of Conduct. Interviews were conducted on a random ‘next person to pass’ basis with the birthday rule[3] used to select an individual from a group of visitors.

2.1.2 Profile of face-to-face respondents

Table 2.4 shows that, overall, three-fifths of respondents were male and two-fifths female. In terms of age, almost three-fifths of respondents were aged 45 years+.

Table 2.4: Profile of face-to-face respondents
Base: all respondents (1,259)

	Number	%
Gender		
Female	473	38
Male	773	61
Age		
16-24	123	10
25-34	191	15
35-44	195	15
45-54	282	22
55-64	228	18
65+	226	18

[2] Cruise line passengers between January and December 2013 totalled 26,477 – Lerwick Port Authority
[3] The birthday rule helps select an individual from a group whose birthday is next or most recent.

2.2 Post Visit Online Survey

2.2.1 Methodology for online survey

An online survey of Shetland visitors generated 368 responses between October 2012 and September 2013. The online survey (see appendix two) asked respondents about the activities and places they had been to during their visit and their satisfaction with a range of elements of their visit. These topics were appropriate for the online survey as the timing (post visit) allowed respondents to reflect on their visit when rating it.

Respondents who took part in the face-to-face and calibration surveys were asked if they would be prepared to volunteer their email address to receive the online survey. A link to the survey was emailed to volunteers on a month-by-month basis and a prize draw for an iPad was offered to encourage a maximum response. The 368 responses represented a 36% response rate which exceeded the initial aim of 300, ensuring a robust sample for analysis.

On Orkney, the online survey generated 821 responses whilst on the Outer Hebrides 888 responses were gained.

Table 2.5: Number of online survey responses per month

Month	**No. of interviews**
October 2012	3
November	10
December	10
January	32
February	15
March	15
April	43
May	52
June	46
July	59
August	70
September 2013	13
TOTAL	**368**

2.2.2 Profile of online respondents

Respondents to the online survey were slightly more likely to be male than female. The age profile is similar to that seen in the face-to-face survey with over three-fifths of respondents aged 45 years+.

Table 2.6: Profile of online respondents
Base: all respondents (368)

	Number	%
Gender		
Female	175	48
Male	193	52
Age		
16-24	19	5
25-34	53	14
35-44	54	15
45-54	90	24
55-64	93	25
65+	57	15

2.3 Face-to-Face Calibration Survey

The calibration survey obtained 5,712 responses and was conducted between October 2012 and September 2013, with interview shifts scheduled with reference to historical passenger data. Trained local interviewers conducted this survey at the same exit points highlighted in table 2.3, though face-to-face and calibration interviews were not conducted at the same time.

Table 2.7: Number of calibration interviews per month

Month	No. of interviews
October 2012	1242
November	652
December	446
January	400
February	264
March	435
April	582
May	488
June	325
July	282
August	332
September 2013	264
TOTAL	**5,712**

This questionnaire (see appendix three) was designed to collect information that allowed estimates to be made on the total volume of visitors to Shetland during the research period. In order to do this, all passengers (both visitors and residents) were included in the survey. This short survey gained information from respondents on three key areas: group size, normal area of residence, and type of visit e.g. on holiday, business or visiting friends and relatives (VFR).

The data gathered in the calibration survey has been combined with passenger volumes supplied by local transport operators to calculate visitor numbers and trip purposes (Holiday, Business and VFR). This data has been used to estimate the value of visits with figures on total expenditure, expenditure by visit type and average spend per visit.

On Orkney the calibration survey gained 4,902 responses whilst on the Outer Hebrides 5,467 people took part.

2.4 Analysis and Reporting

The face-to-face visitor survey gathered key data from respondents such as demographic profile, factors in the decision to visit, transport and accommodation choices, expenditure levels and overall satisfaction. The online survey focussed on visitors' experience, following up issues not covered in depth in the face-to-face survey, such as satisfaction with key aspects of the visit e.g. accommodation and transport. The calibration survey provided data on respondent group size, purpose of visit and residence which has been used to calculate overall volume and value.

Completed face-to-face interviews and responses to an online survey were input to Snap survey software package for analysis and reporting purposes. Snap is a powerful questionnaire design and analysis package which enables results to be created in tabular and chart format with cross-tabulations applied so that results can be fully analysed.

Results are displayed in tables and charts with commentary text to explain the main findings. Where sample sizes allow, and results are noteworthy, comparisons by research period (divided into quarters) and type of visit are highlighted. The report also contains some comparisons with results from Orkney and the Outer Hebrides at the level of visit type e.g. holiday, business or visiting friends/relatives. The appendices of the report contain copies of the survey questionnaires.

The report presents results from two surveys – face-to-face and online – under relevant headings. Tables and charts are labelled according to which survey the results are taken from e.g. there are results on transport from both surveys and these are all found in section 9 on transport. To aid identification all online tables and charts have had the word online colour highlighted. When mean scores are presented these are based on a 1 to 5 rating scale were 1 is the lowest rating and 5 is the highest.

Where an * appears this indicates a result of less than 1%. When responses add up to more than 100% this is a consequence of rounding, or because it was possible for respondents to give more than one answer to a question. Occasionally, some results will not add up to 100% and this may be due to a number of no replies to a specific question.

2.4.1 Comparison with previous visitor surveys

Where relevant, the report provides a comparison of the results for the 2012/2013 survey with two previous visitor surveys conducted on Shetland.

The two surveys used for comparisons are:

1. 2005/2006 Shetland Visitor Survey (AB Associates December 2006)
2. 2000 Shetland Visitor Survey (no details)

The data for the comparisons has been taken from the report on the 2005/2006 survey which included the 2000 data. We have assumed that the findings from previous surveys are based on all respondents as the number of respondents is not shown in the tables.

All three surveys included face-to-face exit interviews with visitors at the airport and ferry terminals. The main difference between the 2012/2013 survey and the previous surveys was that yacht and cruise visitors were excluded: this exclusion was based on the difficulties in surveying yacht visitors in the previous surveys.

The number of face-to-face interviews achieved in the three surveys was significant (see table 2.8) and provide robust data for the comparisons.

Table 2.8: Numbers of face-to face-interviews

Survey	**No. of face-to-face interviews**
2000	1724
2005/2006	1245
2012/2013	1259

The breakdown of the interviews by the interview locations (table 2.9) shows that the results for the two previous surveys were similar to the most recent survey: it should be noted that previous surveys included the seasonal Lerwick ferry operated by Smyril (this ceased operation in 2007).

Table 2.9: Number of interviews completed by location

	2013	**2006**	**2000**
Location	No. of interviews		
Sumburgh	659	561	529
Holmsgarth	600	585	873
Lerwick ferry	n/a	99	322
TOTAL	**1259**	**1245**	**1724**

2.5 Acknowledgements

The successful completion of this project required the help and assistance of a number of organisations and individuals who we would like to thank:

Transport organisations for the supply of passenger data and permission to interview at their locations:

- Caledonian MacBrayne
- HIAL
- Lerwick Port Authority
- Loganair/Flybe
- Northlink/Serco
- Pentland Ferries

Staff at all the participating airports and ferry terminals who accommodated our interviewers and in some cases provided them with training and safety advice.

The client group for their on-going assistance and advice, before and during the research year:

- Shetland Islands Council
- Comhairle nan Eilean Siar
- Orkney Islands Council
- Highlands and Islands Enterprise
- VisitScotland

Our team of face-to-face interviewers based on Shetland, Orkney and the Outer Hebrides without whom the surveys could not have been completed.

3. VOLUME AND VALUE ESTIMATES

3.1 Volume Estimates

3.1.1 Approach

Calibration surveys were undertaken at Sumburgh airport and Holmsgarth ferry terminal on Shetland. These surveys collected information on whether passengers were visitors or residents of Shetland; party size; and, for visitors, what had been the purpose of their visit to the islands. At the airport only passengers using relevant scheduled air services were included in the visitor interviews and calibration surveys. The calibration data was then factored into the passenger carrying data provided by the transport providers to give numbers of visitors using the air and ferry services, and broken down by trip purpose.

Data was obtained from the transport providers on a confidential basis. There are, therefore, limitations to the analysis that is shown here.

Comparisons are made where relevant to the results of the previous Shetland Visitor Survey (2005-2006).

Please note that some of the Tables' column and row data do not sum exactly to the totals shown due to rounding.

3.1.2 Visitor numbers

Table 3.1 shows the estimate of visitor numbers for the 12 month period covered by the survey. There was a total of 64,600 visitors, with slightly more than half (around 35,000) travelling by air.

Table 3.1: Visitor numbers by transport mode (Oct 2012 – Sep 2013)

Route	No. of visitors	Share %
Air	35,414	55
Northlink Ferry	29,241	45
Total	**64,655**	**100**

Table 3.2 compares the estimated numbers of visitors in 2013 with the results of the 2005-2006 survey. The Smyril international ferry service that was operating in 2006 has since ceased, but, despite this, total numbers in 2013 were higher than those reported in 2006. The increase was around 4,700 visitors (approximately 8%). Visitor numbers increased on both the air and Northlink ferry routes: the growth in visitors using ferries has, however, been higher than for air.

Table 3.2: Visitor numbers by transport mode: 2013 and 2006

Route	2013	2006	Difference
Air	35,414	28,911	+6,503
Northlink ferry	29,241	27,248	+1,993
Smyril ferry	-	3,765	-3,765
Total	**64,655**	**59,924**	**+4,731**

3.1.3 Trip purpose

Table 3.3 breaks down 2013 visitor numbers by trip purpose. Within this and subsequent analysis, those who were on a combined business and holiday trip to Shetland have been classified as "Business" visitors.

Holiday and business visitor numbers were very similar: each accounted for 41% of visitors. Visitors who were visiting friends and relatives (VFR) numbers were markedly lower than the other two types.

Table 3.3: Visitor numbers by trip purpose

Purpose	No. of visitors	Share %
Holiday	26,702	41
Business	26,541	41
VFR	11,412	18
Total	**64,655**	**100**

Table 3.4 compares the 2013 position with that in 2006. The number of business visitors has increased by over 4,000, with an increase of around 2,000 in those on holiday. In contrast, there was a decline in the number of VFR visitors (by around 1,000).

Table 3.4: Visitor numbers by trip purpose: 2013 and 2006

Purpose	2013	2006	Difference
Holiday	26,702	24,744	+1,958
Business	26,541	22,099	+4,442
VFR	11,412	13,081	-1,669
Total	**64,655**	**59,924**	**+4,731**

Table 3.5 breaks down visitor numbers by transport route. Air accounted for most (over 60%) of both business and VFR passengers. In contrast, a majority (also over 60%) of holiday visitors travelled by ferry.

Slightly more than half of the visitors who travelled by air were on business, whilst a majority (59%) of visitors on the ferry services were on holiday.

Table 3.5: Trip purpose by transport route

Route/Purpose	Holiday	Business	VFR	Total
Air	9,477	18,550	7,387	**35,414**
Northlink Ferry	17,225	7,991	4,025	**29,241**
Total	**26,702**	**26,541**	**11,412**	**64,655**

Table 3.6 looks at the changes in visitor numbers travelling by air compared to 2006. The number of both holiday and business visitors who travelled by air has increased: the largest growth was in holiday visitors, but the number of business visitors who flew also increased significantly. In contrast, there was a small decline in the number of VFR visitors who travelled by air.

Table 3.6: Trip purpose: Air visitors: 2013 and 2006

Year/Purpose	Holiday	Business	VFR	Total
2013	9,477	18,550	7,387	**35,414**
2006	5,638	15,754	7,519	**28,911**
Difference	**+3,839**	**+2,796**	**-132**	**+6,503**

Table 3.7 shows the changes in visitors' use of the Northlink ferry services. There has been growth in both the holiday and business markets, albeit lower increases than on the air services. As with air travel, there was a fall in the number of VFR visitors using ferry services.

Table 3.7: Trip purpose: Northlink ferry visitors: 2013 and 2006

Year/purpose	Holiday	Business	VFR	Total
2013	17,225	7,991	4,025	**29,241**
2006	15,940	6,063	5,245	**27,248**
Difference	**+1,285**	**+1,928**	**-1,220**	**+1,993**

3.2 Value Estimates

3.2.1 Approach

Expenditure per trip data and other visitor characteristics (e.g. party size) were extracted from the visitor interviews for air and ferry service users and by trip purpose. The data was then applied to the number of visitors in each trip purpose that had been generated through the calibration surveys.

The results shown in this section are weighted by the number of visitors in each trip purpose, including average party size, and they relate only to those who provided expenditure data to the interviewer. Some of the data shown e.g. for length of stay will differ from those shown in later sections because the analysis of the visitor surveys' data was based on unweighted responses.

Comparisons have been made with the results of the 2006 visitor survey. Unless otherwise stated, the 2006 survey's expenditure figures have not been uprated to account for price inflation between 2006 and the present day.

3.2.2 Average expenditure per person per trip

Table 3.8 shows total average spend for **all visitors** to Shetland and breaks this down by individual categories of expenditure.

The total average spend across all categories was £495: within this the highest amounts were spent on travel to/from Shetland and visitor accommodation while on the islands.

It is estimated that £251 of the total spend was made in Shetland. This has been calculated by deducting the figure (£225) for travel to/from Shetland and then, in line with the 2006 Shetland report, it was also assumed that half (in this case £18.50) of the total price of a package/inclusive holiday which some visitors bought as part of their visit to Shetland would accrue to island businesses.

Table 3.8: Average expenditure per person per trip (£)

Category	Expenditure
Travel to/from mainland/departure point	225
Price of package/inclusive holiday	37
Travel costs on the islands	46
Accommodation (including any food and drink)	113
Food and drink bought elsewhere	39
Entertainment and Recreation	18
Shopping for gifts, souvenirs, crafts, etc.	13
Other Shopping	2
Miscellaneous Spend	1
Total spend both on and off Shetland	**493**
Total spend on Shetland	**251**

Table 3.9, compares the 2013 profile against that from the 2006 survey report. Total expenditure was slightly higher (by £15) in 2013. The main reason for this was an increase (£36) in the costs of travel to/from Shetland, although there was also increased spend on accommodation and travel on the islands.

Total spend *in Shetland* appears, however, to have fallen very slightly (by £4). The main reason for this was the fall (of £18) in package/inclusive holiday related spend. There was also a reduction in spend on both food and drink outside the visitors' accommodation and shopping.

Table 3.9 Average expenditure per person per trip (£): 2013 and 2006

Category	2013	2006	Difference
Travel to/from mainland/departure point	225	189	+36
Price of package/inclusive holiday	37	72	-35
Travel costs on the islands	46	33	+13
Accommodation (including any food/drink at premises)	113	87	+26
Food and drink bought elsewhere	39	53	-14
Entertainment and Recreation	18	8	+10
Shopping for gifts, souvenirs, crafts, etc.	13	23	-10
Other Shopping	2	12	-10
Miscellaneous Spend	1	2	-1
Total spend both on and off Shetland	**493**	**480**	**+15**
Total spend on Shetland	**251**	**255**	**-4**

Table 3.10 shows the same breakdown by trip purpose. Total spend (£589) was highest for business visitors, followed by those on holiday (£455) and VFR (£367). For business travellers the cost of getting to/from Shetland accounted for more than half of their total trip spend.

Table 3.10 also shows the clear variation in expenditure on the package/inclusive holiday element. This averages over £80 for those visiting Shetland on holiday, compared to very low levels for other types of visitors.

The average spend **on** Shetland per trip for business (£279) and holiday visitors (£258) was broadly similar. VFR was much lower (£169) than other visitor types, but had the highest levels of average spend for entertainment and recreation and "tourist" shopping (i.e. crafts, etc).

Table 3.10: Average expenditure per person per trip 2013 (£): by trip purpose

Category	Business	Holiday	VFR
Travel to/from mainland/departure point	308	155	197
Price of package/inclusive holiday	4	84	3
Travel costs on the islands	57	40	33
Accommodation (including any food and drink at premises)	146	109	48
Food and drink bought elsewhere	44	33	42
Entertainment and Recreation	19	15	21
Shopping for gifts, souvenirs, crafts, etc.	7	17	18
Other Shopping	4	1	3
Miscellaneous Spend	1	<1	2
Total spend both on and off Shetland	**589**	**455**	**367**
Total spend on Shetland	**279**	**258**	**169**

Table 3.11 compares the 2013 spend profile to that reported in 2006. *Business* visitors' total spend and that in Shetland was greater in 2013 than in 2005-2006. The increase in spend on Shetland was around £30.

Holiday visitors' total spend and that in Shetland were lower than in 2006. Within Shetland, the fall was £36. This reflects in particular, a decrease of over £40 in the amount allocated to package/inclusive holidays. It was also due, however, to lower spend on food and drink outside the visitors' accommodation and in shopping for gifts, etc. In contrast, spend per trip on accommodation had clearly increased.

Total spend by those on *VFR* trips was similar in 2006 and 2013. Spend in Shetland, however, was some £27 lower in 2013. Again, this reflects a lower amount spent on items other than on-island travel and accommodation and shopping in particular.

Some individual categories (e.g. travel costs on the islands) have seen increases, but others (e.g. on food and drink outside the visitor's accommodation) were lower than in 2006.

Table 3.11: Trip purpose: Average expenditure per person per trip: 2013 and 2006

	Business		Holiday		VFR	
Category	**2013**	**2006**	**2013**	**2006**	**2013**	**2006**
Travel to/from mainland/departure point	308	268	155	130	197	166
Price of package/inclusive holiday	4	1	84	172	3	4
Travel costs on the islands	57	41	40	31	33	25
Accommodation (including any food and drink at premises)	146	129	109	79	48	31
Food and drink bought elsewhere	44	55	33	48	42	61
Entertainment and Recreation	19	2	15	12	21	9
Shopping for gifts, souvenirs, crafts, etc.	7	10	17	30	18	30
Other Shopping	4	6	1	6	3	34
Miscellaneous Spend	1	2	<1	2	2	4
Total spend both on and off Shetland	**589**	**514**	**455**	**510**	**367**	**364**
Total spend on Shetland	**279**	**246**	**258**	**294**	**169**	**196**

3.2.3 Expenditure on local products and produce

Visitors were also asked to report their expenditures on each of the following:

- Local crafts such as jewellery, pottery, furniture.
- Local food e.g. fish, meat, cheese, sweets, oatcakes.
- Local beverages/drinks such as whisky, wine, beer, non-alcoholic drinks.

This may have been challenging for some respondents who may not have known if a specific product or produce was local to Shetland and the results shown in table 3.12 should, therefore, be treated with caution.

The average reported spend on local items was slightly less than £15, with the vast majority of expenditure (almost 90%) for crafts. This figure should be treated with some caution given that the average spend reported for *all* shopping for gifts souvenirs, crafts, etc. was £13 (as shown at table 3.8). Overall, the results at table 3.12 imply that 6% of total visitor expenditure was on local products and produce.

Table 3.12: Expenditure on local products and produce (£)

Product/produce	**Ave spend per trip**	**Total spend**
Crafts	13.37	864,597
Food	1.01	65,146
Beverages	0.57	36,691
Total	**14.95**	**966,434**

3.2.4 Average expenditure in Shetland by visitor type

Table 3.13 presents additional results for particular visitor types. It shows an average length of stay in Shetland of 8.0 nights for all visitors compared to 5.8 nights in 2006.

This data produces a 2013 average spend of £31 per day compared to £44 in 2005-2006, largely reflecting increased length of stay on the islands. Total spend per trip, as shown in table 3.9, was similar for both surveys.

Spend per day has fallen for both business visitors and holiday visitors. For the former it has dropped from around £42 to £26: this reflects a significant increase in average length of stay for business visitors, from about six days in 2006 to approaching 11 days in 2013. This increase in the business visitors' length of stay is also one of the reasons for the increased length of stay and lower spend per day across the visitor market as a whole, as business visitors have become an increasingly important element of the market (see later section).

Average spend per day for holiday visitors has fallen from around £62 in 2006 to £45 in 2013. This reflects both a decrease in spend per trip and an increase in length of stay (by around 1.0 days). In contrast, average length of stay for VFR visitors has declined slightly: from 7.6 days in 2006 to 6.9 days in 2013. Their 2013 average spend *per day,* however, was very similar to 2006.

As is generally the case, expenditure per day was highest among those who spend the least time in Shetland: for example, those staying overnight for up to 3 nights have an average spend of £84 per day.

Table 3.13: Average expenditure in Shetland by visitor type (£)

Type	**Expenditure per trip**	**Length of stay**	**Expenditure per person per day**
All Visitors	**251**	**8.0**	**31**
Trip Purpose			
Holiday	258	5.7	45
VFR	169	6.9	24
Business	279	10.8	26
Length of Stay in Shetland			
1-3 nights	165	2.0	84
4-7 nights	233	5.6	42
8+ nights	519	27.4	19
Origin			
Scotland	202	5.8	35
Rest of UK	259	8.1	32
Overseas	362	13.4	27

Table 3.14 shows the details of the variation in spend by length of stay for business visitors. Those staying up to three nights spent an average of £90 per night, whilst at the other end of the spectrum those staying at least eight nights had an average length of stay of over 40 nights. Thus, while the spend per trip for those staying more than eight nights is relatively high (£751) this equates to a low average spend per day (£18). This appears to be a result of current economic activity on Shetland. In particular, those in construction and related sectors working on the islands for considerable periods while staying in accommodation which does not require them to spend much on a daily basis.

Table 3.14: Average expenditure in Shetland by business visitors (£)

Type	Expenditure per trip	Length of stay	Expenditure per person per day
All Business Visitors	**279**	**10.8**	**26**
Length of Stay in Shetland			
1-3 nights	150	1.7	90
4-7 nights	240	5.5	44
8+ nights	751	41.7	18

Table 3.15 presents some further information on overseas visitor spend, showing that the highest spend per trip, and per day, was by those on holiday.

Overseas visitors had a much higher spend per trip than those from the UK, largely reflecting their extended average length of stay in Shetland (at over 13 days). As a result, they had a lower average spend *per day* than domestic visitors, partly as a result of overseas business visitors to Shetland working for extended periods but spending relatively little per day.

A comparison with table 3.13 shows that the spend per trip of both overseas holiday and business visitors was greater than those from the UK. In contrast, overseas VFR visitors spend slightly less than their UK counterparts.

Table 3.15: Average expenditure in Shetland by overseas visitors (£)

Type	Expenditure per trip	Length of stay	Expenditure per person per day
All Overseas Visitors	**362**	**13.4**	**27**
Trip Purpose			
Holiday	388	5.6	70
VFR	162	13.9	12
Business	378	34.2	11

3.3 Total Volume and Value

Table 3.16 gives estimates of the annual volume and value of visitors in the period covered by the 2012-2013 survey.

Around 64,500 visitors had a total spend of over £16.2 million, with spend by business visitors (over £7.4 million) higher than that of holiday visitors (£6.8 million). Together these two types of visitor accounted for 88% of the total spend, with the remainder from VFR.

Table 3.16: Total annual volume and value (2013)

Purpose	Number of visitors	Average spend per trip (£)	Total spend (£)	Share of total spend %
Business	26,541	279	7,415,345	46
Holiday	26,702	258	6,875,929	42
VFR	11,412	169	1,924,899	12
Total	**64,655**	**251**	**16,216,172**	**100**

Table 3.17 shows volume and value by visitor origin. Scottish residents account for approaching half (47%) of the visitors to Shetland. Most of the remainder come from the rest of UK. The higher spend per trip by those from the rest of the UK means that their total spend is quite similar to that of Scottish visitors. Overseas visitors' relatively high spend means that they account for around one quarter (26%) of total visitor spend.

Table 3.17: Total annual volume and value (2013) by visitor origin

Purpose	Number of visitors	Average spend per trip (£)	Total spend (£)	Share of total spend %
Scotland	30,593	202	6,181,131	38
Rest of UK	22,280	259	5,769,034	36
Overseas	11,782	362	4,266,007	26
Total	**64,655**	**251**	**16,216,172**	**100**

Table 3.18 presents the results from the 2006 visitor survey.

The main changes between 2006 and 2013 were:

- Increase in total visitor spend of over £900,000 (unadjusted for inflation). This represents growth of around 6%.

- Significant increase in the total spend by business visitors. This reflects both an increase in their numbers and a greater spend per trip. The latter was due to an increase in the average number of days spent in Shetland.

- Decrease (of around 5%) in total spend by holiday visitors. The increase in their numbers since 2006 was more than offset by a reduction in their average spend per trip.

- Fall in the impacts of VFR trips. This was due to both fewer being made and a decrease in average spend per trip.

Adjusting the 2006 total spend for price inflation (based on the Consumer Price Index) gives a figure of £18,863,550 in 2012-2013 prices. This compares to the 2013 figure of £16,216,172 shown at table 3.16.

Thus, total visitor spend in 2013 was around £2.6 million lower than the inflation-adjusted 2006 figure. This reflects a real terms decrease in visitors' average spend per trip and should be viewed within the context of the general economic downturn from 2009 onwards, with its negative impacts on real income levels and unemployment.

Table 3.18: Total annual volume and value (2006)

Purpose	Number of visitors	Average spend per trip (£)	Total spend (£)	Share of total spend %
Holiday	24,744	294	7,274,736	48
Business	22,099	246	5,436,354	36
VFR	13,081	196	2,563,876	17
Total	**59,924**	**255**	**15,274,966**	**100**

3.4 Other Visitor Activity: Cruise Liners and Yachts

In addition to the visitors covered by this survey, Shetland also has visitors who arrive by cruise liner or yacht. Data provided by Lerwick Port Authority show a total of 26,477 passengers on cruise liners that called at Lerwick during calendar year 2013.

4. PROFILE OF VISITORS

Face-to-face survey respondents were asked to provide information on the gender and age of the people they were visiting Shetland with. In all, respondents provided information on 2,075 visitors.

4.1 Gender Profile

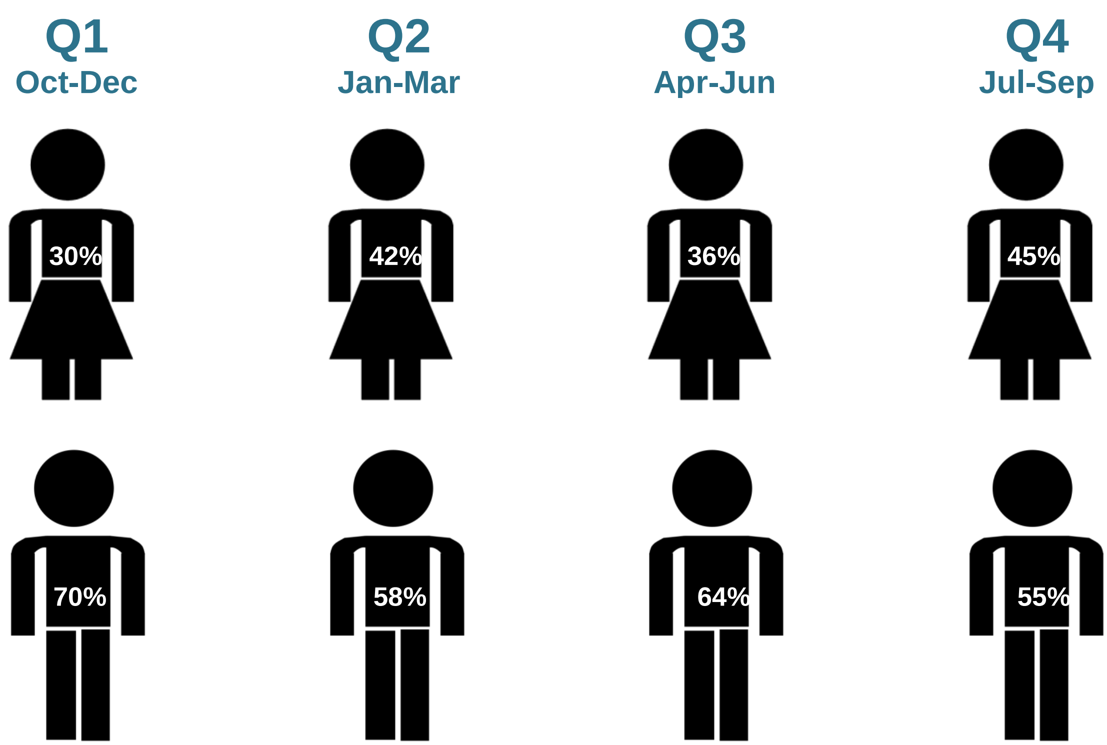
4.1.1 Gender profile – 2013 survey

Overall, 60% of visitors were male and this pattern was reflected across the research period with more male than female visitors recorded in each quarter, particularly between October-December. The differences in gender between July-September are smaller, suggesting a more even gender profile in these summer months.

Table 4.1: Gender of visitors
Base: all face-to-face visitors (2,075)

	%
Female	40
Male	60

Chart 4.1: Gender of visitors – by quarter
Base: all visitors (2,075)



4.1.2 Gender profile - comparison with previous visitor surveys
The profile of the gender and age of visitors is based on the data that respondents provided on their group in 2006 and 2013: the total number of visitors for each survey is shown in the tables.

Visitors to Shetland continue to be much more likely to be male (60%) than female (40%) and the results suggest a slight increase in the proportion of males.

Table 4.2: Gender of visitors - comparison with previous visitor surveys
Base: all visitors

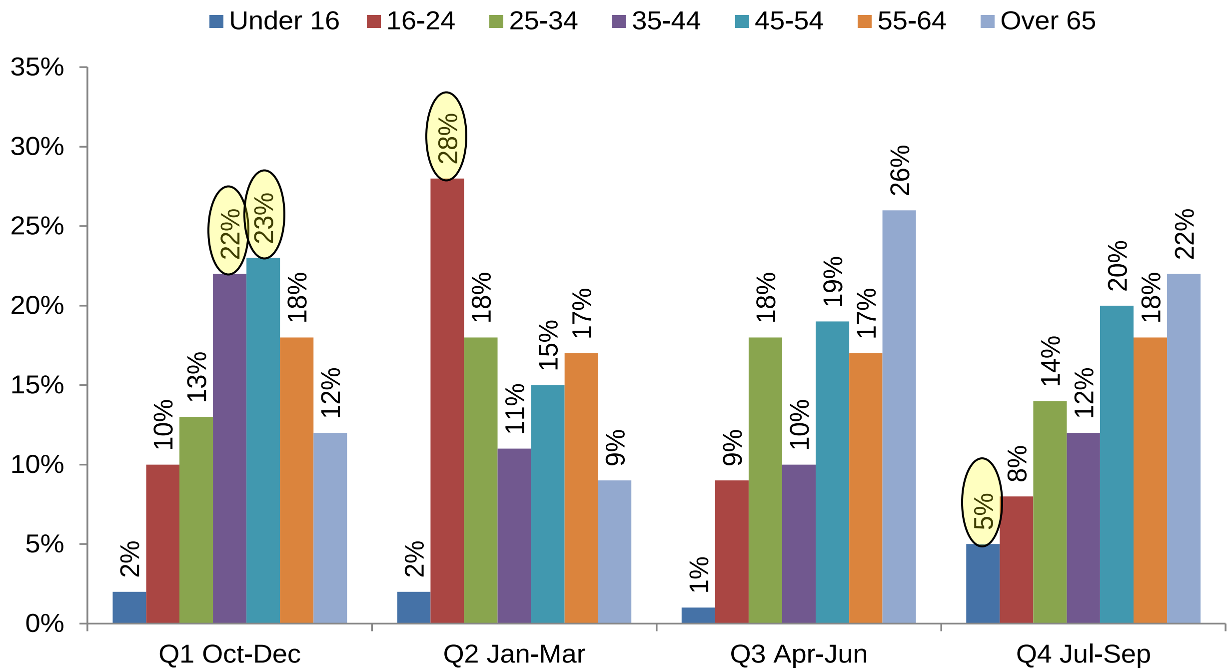
	2013	**2006**
Number of visitors	2075	2248
	%	%
Female	40	42
Male	60	58

4.2 Age Profile
4.2.1 Age profile - 2013
Table 4.3 shows that over half of visitors were aged 45 years+ (56%). However, when viewed by quarter the age profile of visitor displays some noticeable variations. Chart 4.2 highlights how the age profile of respondents changed as the research period progressed, for instance with more respondents aged 35-54 between October-December and a significant percentage of 16-24 years olds between January-March. The pattern between April-September is more consistent with a tendency for visitors to be older, a reflection of the increased likelihood of these age-groups going on holiday in the summer months. Of note, the percentage of under 16s increased between July-September, a period which covers school holidays.

Table 4.3: Age of visitors
Base: all face-to-face visitors (2,075)

	%
Under 16	3
16-24	12
25-34	16
35-44	12
45-54	19
55-64	17
65+	20

Chart 4.2: Age of visitors – by research quarter
Base: all face-to-face visitors (2,075)



4.2.2 Age profile - comparison with previous visitor surveys

The age profile of visitors is shown in the table below in the three broad age groups used in the reporting of the 2006 and 2000 surveys. The results suggest that the age profile of visitors has remained very similar to 2006, with approximately half aged between 25-55 years old and just over a third of visitors over 55 years old.

Table 4.4: Age of visitors - comparison with previous visitor surveys
Base: all visitors

	2013	2006	2000
Number of visitors	2075	2248	3553
	%	%	%
Under 24	15	13	5
25-55	47	52	65
Over 55	37	35	30

Sections 4.3 and 4.4 present further demographic information based on respondents, rather than visitors. As this information is on household residence and social grade it was not necessary to gather information from all visitors to inform an accurate profile.

4.3 Residence Profile

4.3.1 Residence profile - 2013

Almost half (48%) of respondents were from Scotland with a third from elsewhere in the UK and Ireland. Quarterly results, displayed in table 4.5, show a clear pattern with more respondents from overseas (Europe, Rest of world) between April-June and, especially, July-September when overseas visitors accounted for nearly a quarter of all respondents.

Chart 4.3: Residence of respondents
Base: all face-to-face respondents (1,259)

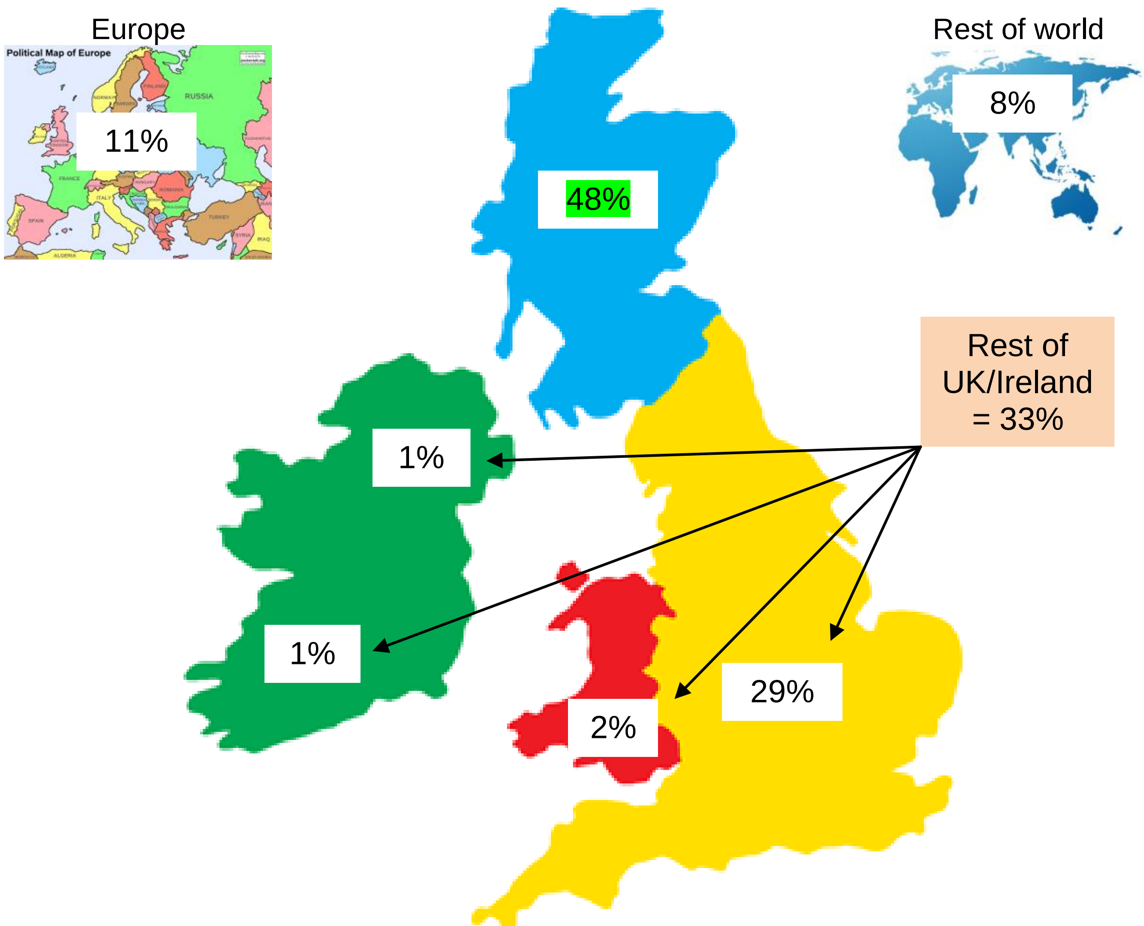


Table 4.5: Residence of respondents – by quarter
Base: all face-to-face respondents (1,259)

	Q1 % Oct-Dec	Q2 % Jan-Mar	Q3 % Apr-Jun	Q4 % Jul-Sep
Scotland	68	60	45	40
Rest of UK/Ireland	23	35	31	35
Europe	7	3	9	17
Rest of world	3	4	11	7

The table below displays the residence of respondents in more detail and highlights that from Europe, a range of countries were represented by respondents, whilst from the rest of the world, Americans, Australians and Canadians accounted for most respondents. Excluding the UK and Ireland, 36 other countries were represented by respondents during the research period.

Table 4.6: Residence of respondents – Detailed results
Base: all respondents (1,259)

	%
Scotland	48
Rest of UK	33
- England	*29*
- Wales	*2*
- Republic of Ireland	*1*
- Northern Ireland	*1*
- Other UK e.g. Isle of Man	*
Europe	11
- Germany	*2*
- Norway	*2*
- France	*1*
- Switzerland	*1*
- The Netherlands	*1*
- Poland	*1*
- Italy	*1*
- Spain	*
- Sweden	*
- Denmark	*
- Other Europe	*4*
Rest of world	7
- USA	*3*
- Australia	*2*
- Canada	*2*
- New Zealand	*
- UAE	*
- The Philippines	*
- Other country	*1*

Other Europe (all individual numbers): Austria, Czech Republic, Finland, Latvia, Slovakia, Slovenia, Ukraine (2), Belgium, Bulgaria, Faroe Islands, Greece, Hungary, Portugal, Romania, Russia (1).

Other country (individual numbers): Japan (2), China, India, Mexico, Thailand (1).

Within Scotland respondents, no one location dominated. Over a tenth were likely to be residing in the cities of Aberdeen or Glasgow (both 13%), in the Highland region (12%) or in the city of Edinburgh (11%).

Table 4.7: Residence of respondents – Detailed results on Scottish residence
Base: all respondents resident in Scotland (601)

	%
Aberdeen City	13
Glasgow City	13
Highland	12
Edinburgh, City of	11
Aberdeenshire	9
Orkney Islands	7
Fife	5
Moray	3
Angus	2
Perth & Kinross	2
South Lanarkshire	2
North Lanarkshire	2
Dundee City	2
Falkirk	2
Dumfries & Galloway	1
Argyll & Bute	1
Stirling	1
Scottish Borders	1
West Lothian	1
East Ayrshire	1
East Lothian	1
North Ayrshire	1
South Ayrshire	*
Renfrewshire	*
West Dunbartonshire	*
East Dunbartonshire	*
Clackmannanshire	*
East Renfrewshire	*
Outer Hebrides	*
Inverclyde	*

English respondents resided in a range of areas with no one area dominating the results, although almost a third were from the North (30%) and a quarter were from the South East/West (37% if Greater London is included).

Table 4.8: Residence of respondents – Detailed results on English residence
Base: all respondents resident in England (359)

	%
North West	16
South East	16
North East	14
Greater London	12
Yorkshire/Humberside	11
South West	9
East Midlands	9
West Midlands	8
East Anglia/East of England	4

4.3.2 Residence profile - comparison with previous visitor surveys
All three surveys used respondent data to provide the profile of visitors relating to area of residence, social grade and party type.

The key change in area of residence of visitors in 2013 is an increase in visits from Scottish residents and a decrease in the proportion of visitors from overseas.

Table 4.9: Area of residence - comparison with previous visitor surveys
Base: all respondents

	2013	2006	2000
Number of respondents	1259	1245	1724
	%	%	%
Scotland	48	44	45
Rest of UK/Ire	33	32	35
Overseas	19	24	20

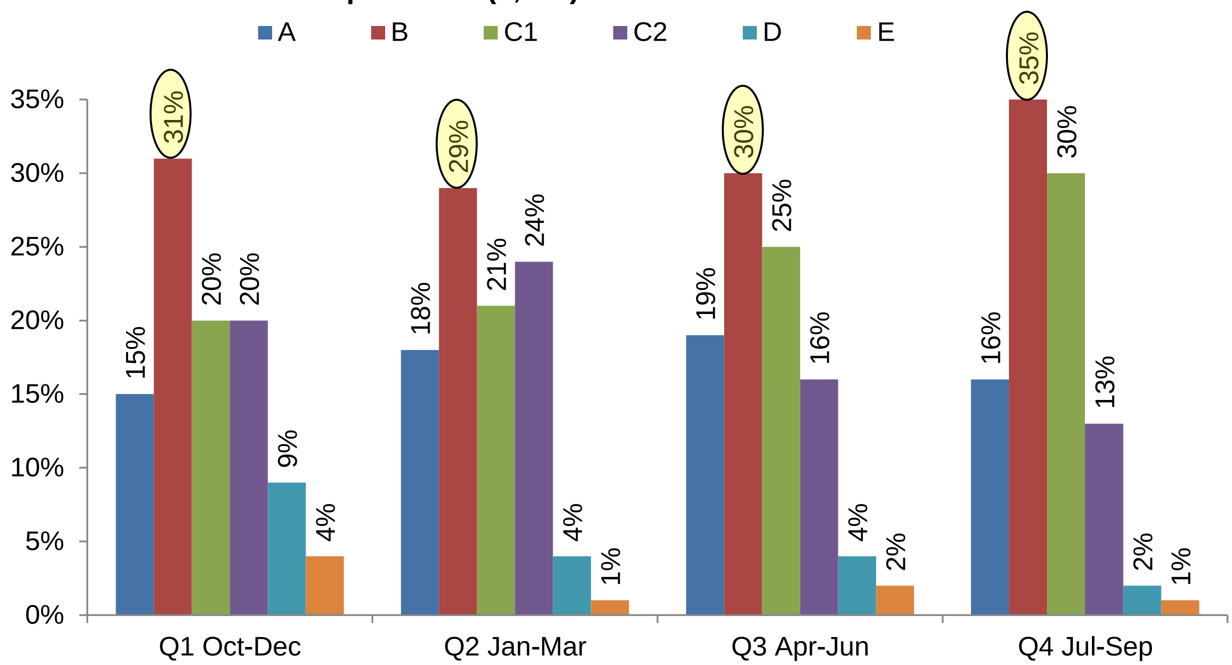
4.4 Socio-economic Profile

4.4.1 Socio-economic profile - 2013
The B social grade accounted for nearly a third of respondent households and this trend was consistent across the research period as displayed in chart 4.4, with between 29% and 35% of respondents occupying the B social grade in each quarter of the research.

Table 4.10: Social grade of respondents
Base: all face-to-face respondents (1,259)

	%
A – upper middle class	17
B - middle class	32
C1 – lower middle class	26
C2 – skilled working class	16
D – working class	4
E - those at lowest level of subsistence	2

Chart 4.4: Social grade of respondents – by research quarter
Base: all face-to-face respondents (1,259)



4.4.2 Socio-economic profile - comparison with previous visitor surveys

The social grade of visitors has shown a significant change, with an increase in AB visitors (from 27% in 2006 to 49% in 2013) and a decrease in the proportion of C1 visitors (from 41% in 2006 to 26% in 2013). The reasons for this change are not clear and may reflect a change in the way that social grade was recorded. The 2013 survey involved showing respondents a list of occupations corresponding to social grades (developed by VisitScotland) and asking them to select the category they felt best described the main income earner. The previous surveys used the technique of asking respondents the occupation of the chief income earner and assigning social grade post interview.

Table 4.11: Social grade - comparison with previous visitor surveys
Base: all respondents

	2013	2006	2000
Number of respondents	1259	1245	1724
	%	%	%
AB	49	27	35
C1	26	41	42
C2	16	21	17
DE	6	7	5
No response	3	4	1

4.5 Group Profile

4.5.1 Group profile - 2013

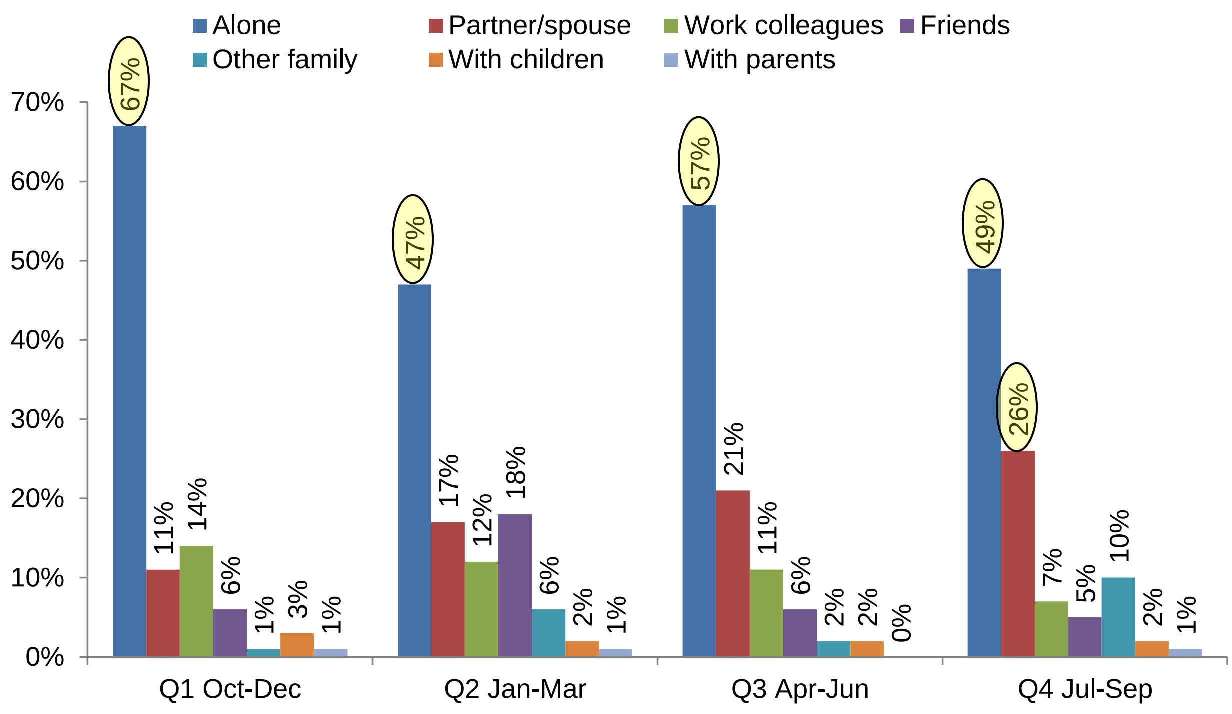
Over half of respondents were travelling alone (usually on business) whilst a fifth were with their partner/spouse. These groups accounted for nearly three-quarters of all respondents. The overall trend was apparent across the research period with respondents travelling alone accounting for between a half and two-thirds of respondents in each quarter. Respondents visiting with their partner/spouse increased across the research period, accounting for a quarter of respondents between July-September.

Table 4.12: Group profile of respondents
Base: all face-to-face respondents (1,259)

	%
Travelling alone	53
Partner/spouse	21
Business/work colleagues	10
Friends	7
Other members of family	6
With child/children	2
With parents/partners parents	1

Note: some respondents gave more than one answer to this question.

Chart 4.5: Group profile of respondents – by research quarter
Base: all face-to-face respondents (1,259)



4.5.2 Group profile - comparison with previous visitor surveys

There was an increase in visitors travelling on their own, with over half now doing so: this reflects the high proportion of solo business travellers. Other types of party show little change over the three surveys, with slight decreases in couples and those travelling with families. (Note: the 2013 question allowed multiple answers, whilst the previous surveys were single answers.)

Table 4.13: Party type - comparison with previous visitor surveys
Base: all respondents

	2013	2006	2000
Number of respondents	1259	1245	1724
	%	%	%
Travelling alone	53	47	52
Partner/spouse (*couple - 2006/2000)*	21	25	20
Friends	7	9	6
Other members of family/children	8	6	12
Business/work colleagues	10	9	8
With parents/partners parents	1	n/a	n/a

4.6 Profile of Visitors – Island Comparisons

Table 4.14 displays the profile of visitors on each of the three islands. The results show some similarities and differences:

- There were more male than female visitors on all the islands and the gender profiles on Orkney and the Outer Hebrides were identical, whilst Shetland differed slightly with more male visitors
- Over 45s accounted for around three-fifths of visitors on each island
- The Outer Hebrides had the highest proportion of visitors from Scotland whilst visit levels from the UK/Ireland were similar on each island. Orkney had the most visitors from overseas (Europe/Rest of world) accounting for a quarter of visitors
- The social grade of visitors on Orkney and the Outer Hebrides was similar with ABs accounting for around three-fifths of visitors. On Shetland, the BC1 grades accounted for a similar proportion of visitors
- Travelling alone or with partner/spouse were the most common types of group on all the islands though the balance varied by island with travelling alone more common on Shetland and with partner/spouse most common on the Outer Hebrides

Table 4.14: Profile of Visitors – by Island
Base: all visitors (2,075)

	Orkney %	Outer Hebrides %	Shetland %
Gender			
Female	45	45	40
Male	55	55	60
Age			
Under 16	7	10	3
16-24	6	6	12
25-34	11	12	16
35-44	13	14	12
45-54	18	21	19
55-64	22	19	17
65+	23	19	20
Residence			
Scotland	43	58	48
Rest of UK/Ire	31	29	33
Europe	14	8	11
Rest of world	11	4	8
Social grade			
A – upper middle class	32	28	17
B - middle class	30	33	32
C1 – lower middle class	19	19	26
C2 – skilled working class	12	15	16
D – working class	3	3	4
E - lowest level of subsistence	2	1	2
Group type			
Travelling alone	37	32	53
Partner/spouse	37	47	21
Friends	12	9	7
Other members of family	8	8	6
Business/work colleagues	4	5	10
With child/children	6	11	2
With parents/partner's parents	1	4	1

5. TYPE OF VISIT

5.1 Main Type of Visit

5.1.1 Type of visit – 2013

With reference to a pre-coded list, respondents selected the option which best described their visit to Shetland. Face-to-face survey results show that overnight trips for business (35%) or holiday/short breaks (34%) were the main type of visits taken, accounting for nearly seven-tenths of respondents.

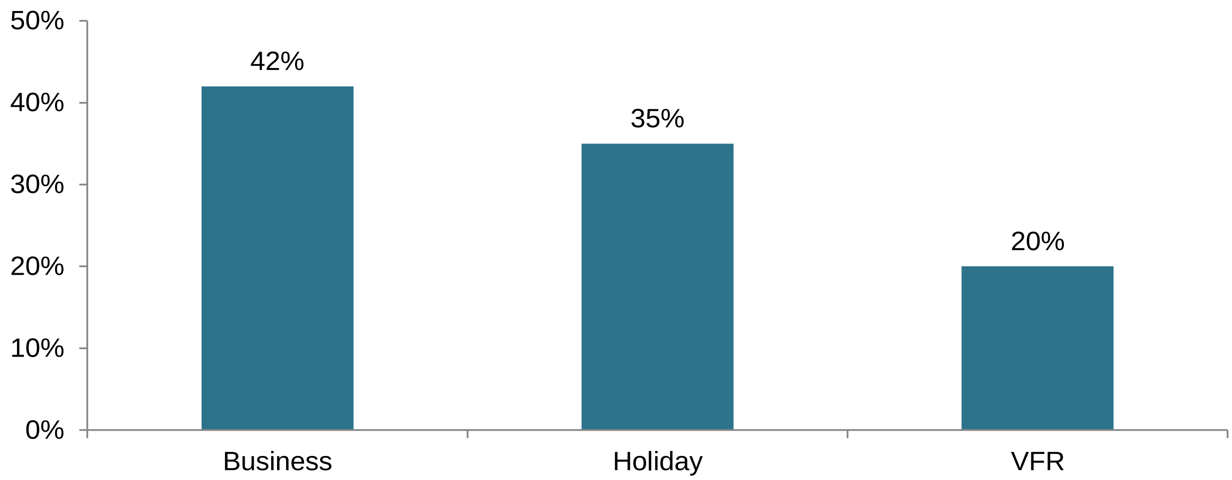
The online survey gave visitors an additional opportunity to provide some detailed feedback on their visitor experience. Respondents to this survey were also asked about type of visit. A similar proportion were overnight holiday visitors, but overnight business visitors were less likely to respond.

Table 5.1: Main type of visit
Base: all face-to-face (1,259) and online (368) respondents

	Face-to-face	Online
	%	%
On business - overnight trip	35	19
Holiday/short break involving staying overnight	34	38
Visiting friends/relatives for leisure/holiday - overnight	18	13
On business - day trip	7	4
Combining business and holiday	2	5
Visiting friends or relatives for leisure/holiday - day trip	2	4
Holiday - day trip	1	7

The above results help establish the percentage of respondents making holiday, VFR or business type visits. Chart 5.1 highlights that when face-to-face survey results for overnight and day trips for business are combined, they account for the largest proportion of visit types amongst Shetland respondents.

Chart 5.1: Main type of visit
Base: all face-to-face respondents (1,259)



5.1.2 Type of visit – by research quarter

The percentage of respondents on holiday visits increased as the research period progressed, especially between July-September (compared to October-December), whilst in contrast the percentage of respondents on business peaked between October-December and then remained quite consistent at around two-fifths of all respondents for the rest of the research. Aside from October-December the balance of business and holiday respondents was quite even.

Table 5.2: Main types of visit – by quarter
Base: all face-to-face respondents (1,259)

	Q1 % Oct-Dec	Q2 % Jan-Mar	Q3 % Apr-Jun	Q4 % Jul-Sep
Business	54	37	45	37
Holiday	15	35	33	43
VFR	26	24	18	17

5.1.3 Type of visit - comparison with previous visitor surveys

There have been significant changes in the types of visit to Shetland:

- The proportion of holiday visitors has shown a steady decrease since 2000: declining by 5% each survey
- In contrast, the proportion of business visitors has increased steadily since 2000, starting at 25% in 2000 and rising to 42% in 2013.
- The proportion of VFR visitors has remained the same in 2013 compared with 2006 at around 20%

Table 5.3: Main type of visit - comparison with previous visitor surveys
Base: all respondents

	2013	2006	2000
Number of respondents	1259	1245	1724
	%	%	%
Business	42	35	25
Holiday	35	40	46
VFR	20	21	24

5.2 Frequency of Visit

5.2.1 Frequency of visit - 2013

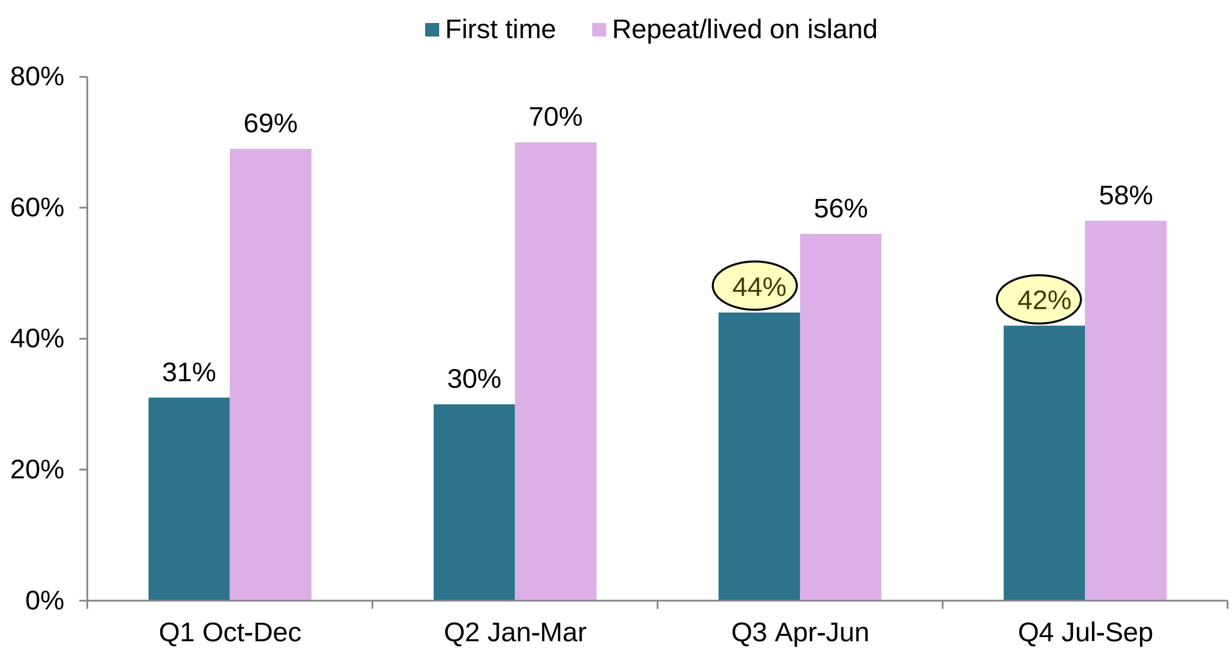
Viewed by visit type, first time and repeat visits can be further analysed. Respondents visiting for the first time were more likely to be on holiday (60%) than business (32%) or VFR (21%) whilst respondents on a repeat visit were very likely to be on a VFR or business visit.

Table 5.4: Frequency of visit – total and by type of visit
Base: all face-to-face respondents (1,259)

	Total %	Holiday %	VFR %	Business %
This is my first visit	40	60	21	32
Repeat visit / lived on island	60	40	78	69
- Once before	*40*	*11*	*8*	*9*
- Twice	*10*	*3*	*5*	*5*
- 3-5 times	*4*	*10*	*12*	*15*
- 6-10 times	*12*	*4*	*9*	*11*
- More than 10 times	*8*	*6*	*25*	*28*
- Lived on island	*19*	*6*	*19*	*1*

The proportion of respondents on a first time visit increased as the research progressed into the April-September period with the impact coming largely from respondents on holiday, reflecting the increase in holiday visits shown in table 5.2 above.

Chart 5.2: Frequency of visit – by quarter
Base: all face-to-face respondents (1,259)



5.2.2 Frequency of visit - comparison with previous visitor surveys

The proportion of first time visitors has declined compared to 2006 and it now stands at 40% compared with 51% in the previous survey. This can be attributed mainly to the lower proportions of holiday visitors on first time visits: in 2013, 60% of holiday visitors were on first time visits compared to 81% in 2006.

Frequency of visits for repeat visitors remains similar to 2006, although there has been an increase in those visiting more than 10 times. This reflects the higher proportion of business visitors in 2013 as this group is more likely than holidaymakers or VFR to visit 10 plus times.

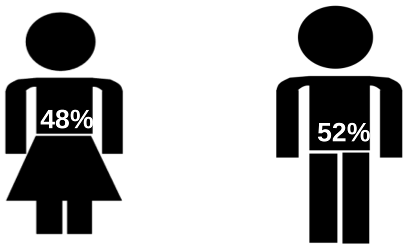
Table 5.5: Frequency of visit - comparison with previous visitor surveys
Base: all respondents

	2013	**2006**	**2000**
Number of respondents	1259	1245	1724
	%	%	%
This is my first visit	40	51	42
Repeat visit / lived on island	60	49	58
- Once before	*10*	*9*	*26*
- Twice	*4*	*6*	
- 3-5 times	*12*	*8*	
- 6-10 times	*8*	*6*	*7*
- More than 10 times	*19*	*13*	*25*
- Lived on island	*6*	*7*	*n/a*

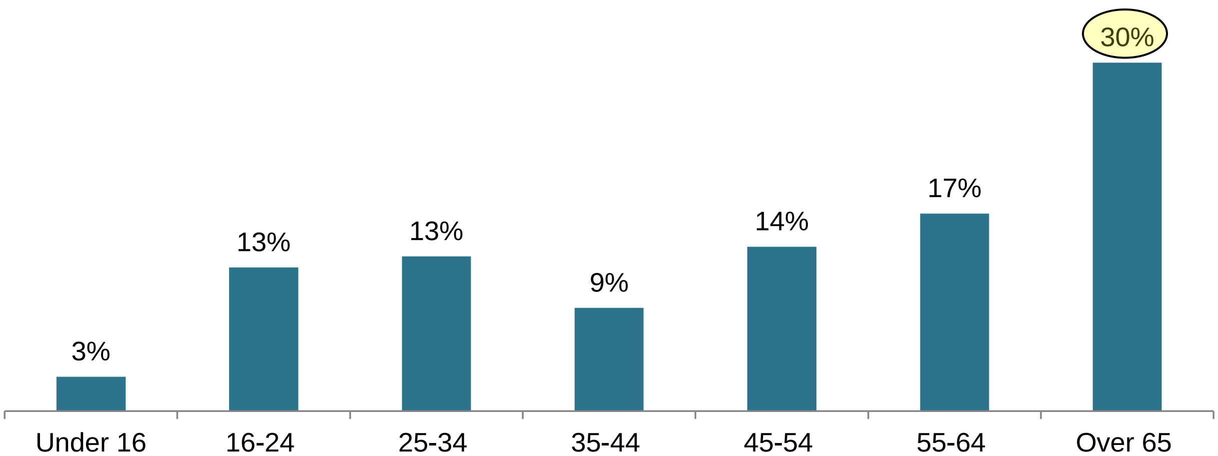
A profile of each of the main visit types is presented in sections 5.2.3 to 5.2.5.

5.2.3 Main type of visit – holiday

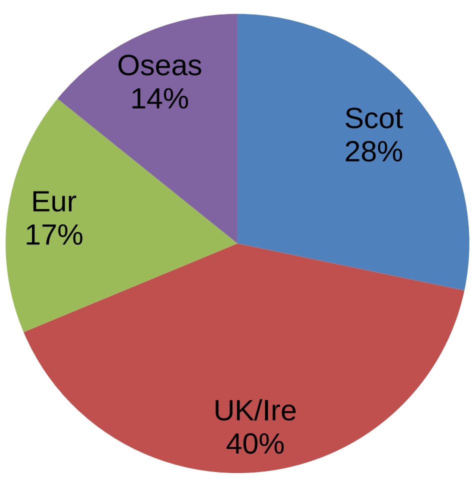
Respondents on holiday[4] were almost equally likely to be male or female and three-fifths were making their first visit to Shetland.

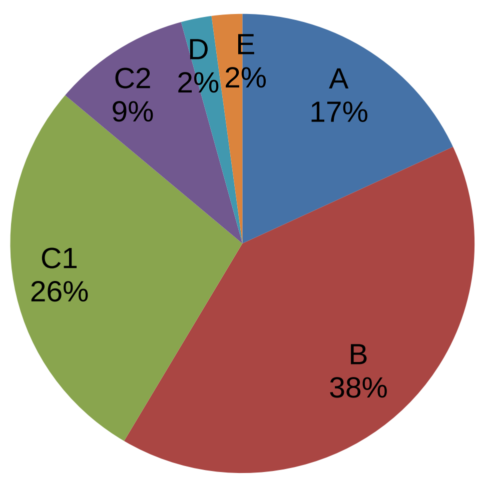


Nearly a third of respondents on holiday were aged 65+.



Two-fifths of holiday respondents were from the rest of the UK/Ireland whilst nearly a third were from overseas. Over half the respondents (55%) occupied social grades A and B (almost two in five were B), with a further quarter being classified as C1.

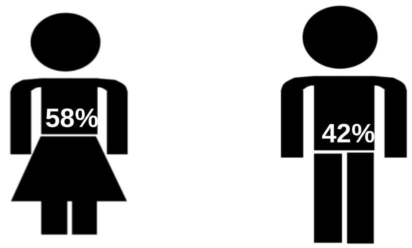




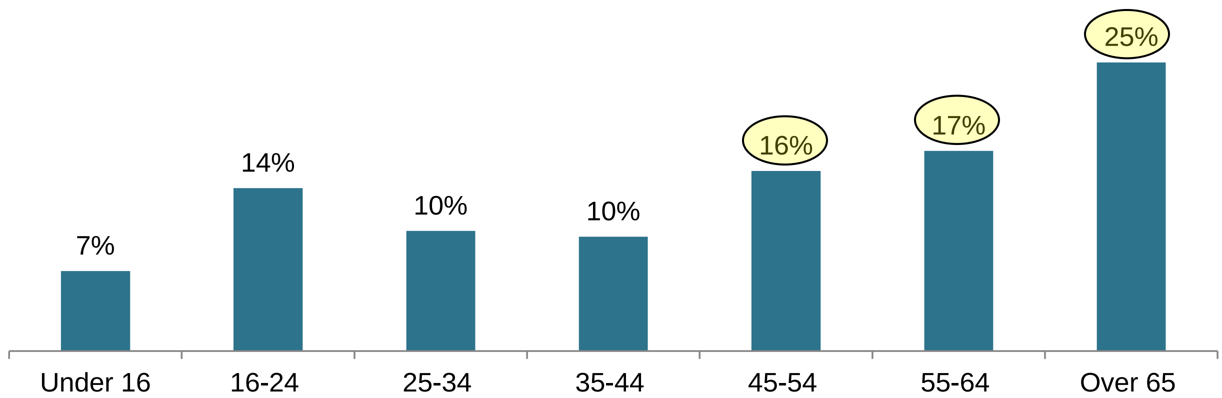
[4] Gender/Age based on 934 visitors. Frequency/Residence/Social grade based on 450 respondents.

5.2.4 Main type of visit – VFR

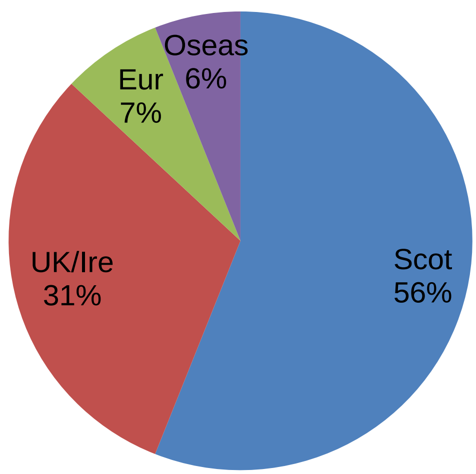
VFR respondents[5] were almost as likely to be female as male and over three-quarters were making a repeat visit to Shetland.

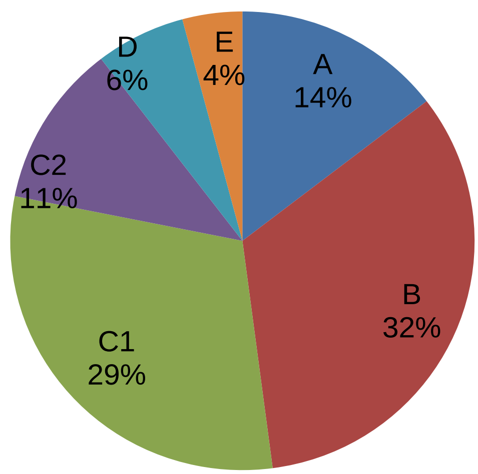


Nearly three-fifths of VFR respondents were aged 45+ with a trend towards older respondents.



Over half of VFR respondents were from Scotland and nearly a third were from the rest of the UK or Ireland. The B and C1 social grades accounted for three-fifths of VFR respondents.

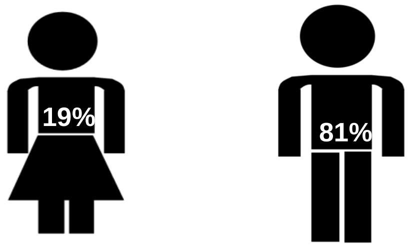




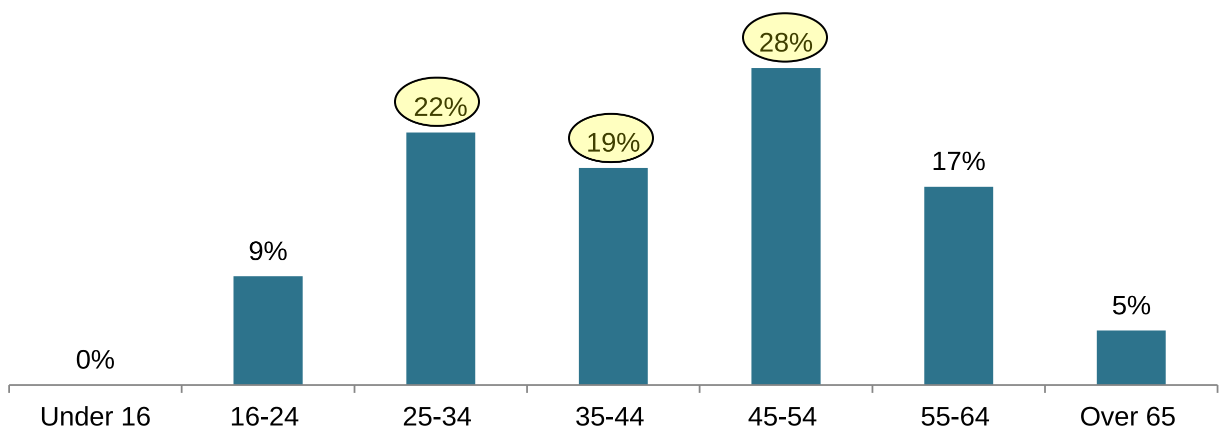
5 Gender/Age based on 401 visitors. Frequency/Residence/Social grade based on 244 respondents.

5.2.5 Main type of visit – business

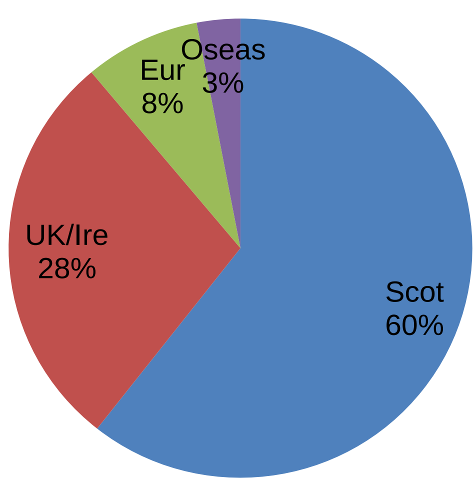
Respondents on business[6] were much more likely to be male than female and nearly seven-tenths were making a repeat visit to Shetland.

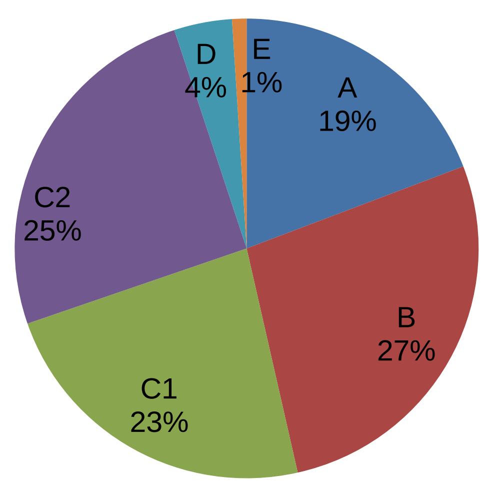


Nearly seven-tenths of business respondents (69%) were aged between 25 and 54.



Three-fifths of business respondents were from Scotland with over a quarter from the rest of the UK/Ireland. Business respondents tended to occupy four of the six social grades, with almost half (46%) being classified as A or B and a similar proportion occupying the C1 and C2 grades (this reflecting oil and gas, transport and construction roles).



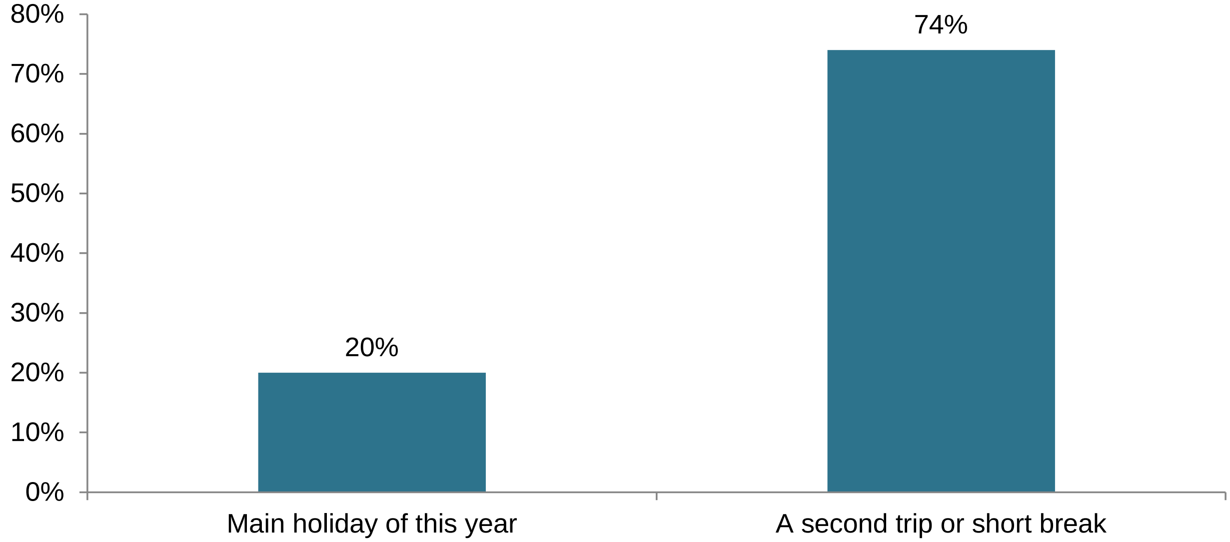


[6] Gender/Age based on 677 visitors. Frequency/Residence/Social grade based on 528 respondents.

5.3 Overnight Visits

Respondents who were on an overnight visit described as a holiday/short break or VFR were asked whether the visit was their main holiday for the year or a second holiday/short break. Chart 5.3 shows that overnight holiday/VFR visits were most likely to be second trips or short breaks as opposed to main holidays.

Chart 5.3: Type of visit – by overnight holiday/VFR
Base: face-to-face respondents staying overnight on holiday or VFR (657)



5.4 Business Visits

Respondents who were on a business trip (overnight or day trip) were asked about the industry that they worked in. Oil and gas (30%) was clearly the main industry represented, though a wide range of other industries were also highlighted.

Table 5.6: Profile of respondents – Industry worked in
Base: face-to-face respondents on a business visit - day trip or overnight (557)

	%
Oil and gas	30
Transport - shipping etc.	6
Building/Construction	5
Health services	4
Government/local government	3
Retail sales/service	3
Fishing	3
Renewable energy	2
Financial services	2
Food/drink manufacture	2
IT	2
Tourism	2
Industrial manufacturing	1
Education	1
Electrical	1
Engineering	1

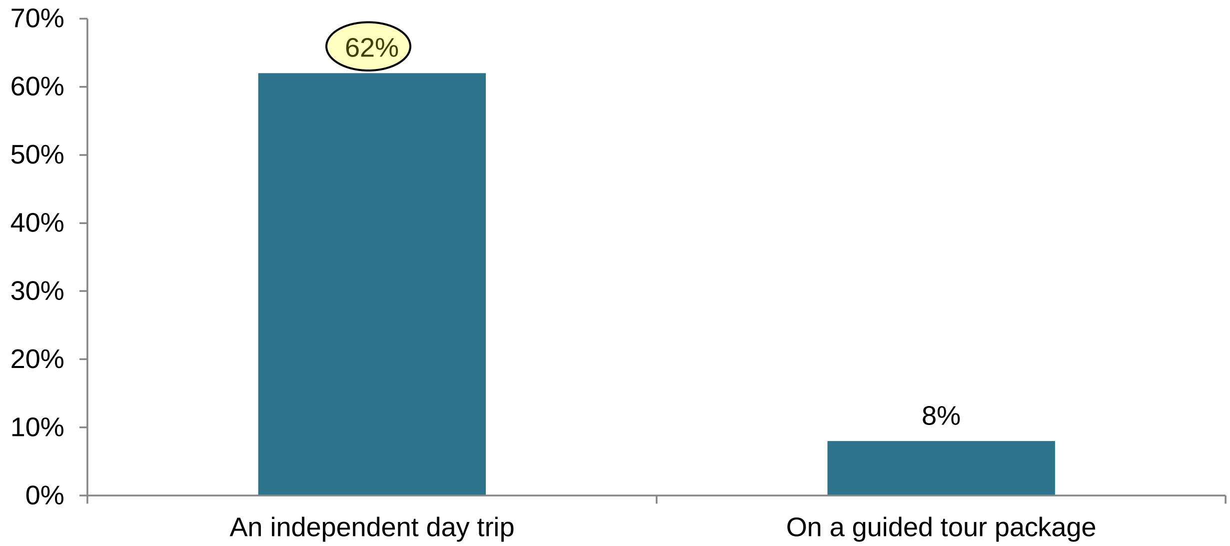
Table 5.6: Profile of respondents – Industry worked in *(Continued)*
Base: face-to-face respondents on a business visit - day trip or overnight (557)

Fish farming	1
Music	1
Air	1
Aquaculture	1
Hospitality	1
Marine	1
Arts	1
Water	1
Media	1
Fire	1
Power	1
Legal	1
Other	30

5.5 Day Trip Visits

Respondents who were on a day trip described as a holiday or VFR were asked whether this was part of a guided tour package or an independent day trip. For the majority of respondents the visit was the latter (62%), though a number of respondents did not answer this question. Almost two-thirds of those on independent day trips were travelling by ferry from Aberdeen.

Chart 5.4: Type of visit – by day trip holiday/VFR
Base: face-to-face respondents on a day trip for holiday/VFR (37)



Note: please note low base figure for the chart (37).

5.6 Length of Visit

5.6.1 Length of visit – 2013

The average length of stay on Shetland was 10.1 nights with a further 1.4 nights spent elsewhere in Scotland and an average of 11.7 nights in total spent away from home. There are some notable variations by visit type with business respondents spending longer away from home overall than VFR or holiday. This reflects the fact that some business respondents were spending extended periods of time on Shetland.

Table 5.7: Average no. nights away from home – total and by visit type
Base: all face-to-face respondents (1,259)

	Total	Holiday	VFR	Business
On Shetland	10.1	6.9	9.4	13.3
Elsewhere in Scotland	1.4	2.7	0.8	0.7
Total trip away from home	11.7	10.0	10.2	14.1

5.6.2 Length of visit - comparison with previous visitor surveys

The average length of trip had decreased from 14.5 nights in 2006 to 11.7 nights in 2013. Given that the number of nights spent in Shetland had *increased* by 4.3, it is apparent that the decrease in overall trip length is due to the decrease in time that visitors were spending outside Scotland (down by 6.1 nights).

Table 5.8: Average no. of nights away from home - comparison with previous visitor surveys
Base: all respondents

	2013	2006
	no of nights	no of nights
On Shetland	10.1	5.8
Elsewhere in Scotland	1.4	2.4
Other	0.2	6.3
Total trip away from home	**11.7**	**14.5**

The number of nights spent on Shetland had more than doubled between 2006 and 2013, reflecting the fact that some business visitors were spending extended periods of time on Shetland. The average number of nights spent by holiday visitors and VFR had also increased, but only by a relatively small amount compared with business visitors.

Table 5.9: Average no. of nights on Shetland - comparison with previous visitor surveys
Base: all respondents

	2013	2006
	no of nights	no of nights
Holiday	6.9	4.7
VFR	9.4	7.6
Business	13.3	5.8

5.7 Areas Visited

5.7.1 Areas visited – 2013

Lerwick was the area that most respondents had visited, followed by North Mainland and South Mainland. Lerwick was more likely to be visited by respondents on holiday (67%) or business (61%) compared to VFR (47%). Nearly half of respondents stayed for a night or more in Lerwick compared to nearly a fifth who stayed in North Mainland and around one-tenth who stayed in South Mainland and Central Mainland.

Table 5.10: Average nights away from home – by area visited
Base: all face-to-face respondents (1,259)

	Visited %	Stayed %
Lerwick	61	49
North Mainland	24	17
South Mainland	24	12
Central Mainland	16	10
West Mainland	11	8
Unst	10	8
Yell	7	3
Fair Isle	3	2
Whalsay	2	1
Fetlar	2	1
Bressay	2	*
Foula	1	*
Out Skerries	1	*
Papa Stour	*	*

Note: some samples were too small to generate an average no. of nights.

5.7.2 Areas visited – comparison with previous visitor surveys

The average nights stayed had increased in all the most popular areas, but the highest increase was in North Mainland where it had multiplied by five.

Table 5.11: Average no. of nights by area - comparison with previous visitor surveys
Base: all respondents

	2013	2006
	no of nights	no of nights
Lerwick	4.21	2.51
North Mainland	2.20	0.44
South Mainland	0.96	0.84
Central Mainland	0.86	0.49
Unst	0.49	0.36
West Mainland	0.47	0.30

Lerwick remains the most popular area for visitors, followed by North and South Mainland. The results suggest a decrease in the proportion of visits to all areas: the reasons for this are not clear but could simply reflect differences in the recording of this information in the two surveys (such as different wording of the question in 2006 - a copy of 2006 questionnaire is not available to check).

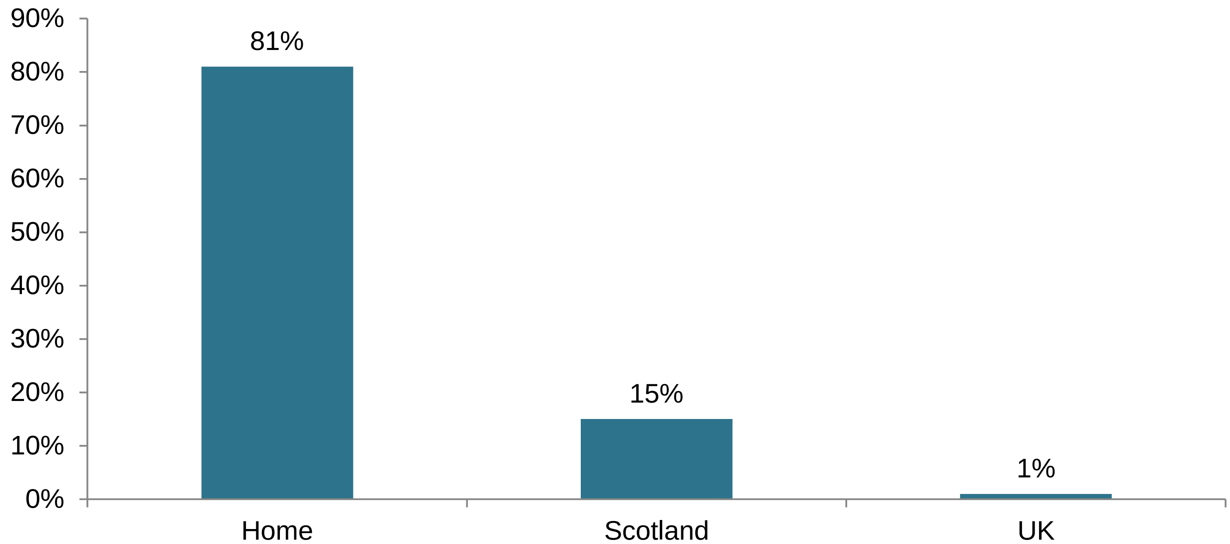
Table 5.12: Areas visited (by more than 5% of visitors)
Base = all respondents

	2013	2006
No of respondents	1259	1245
	%	%
Lerwick	61	97
North Mainland	24	61
South Mainland	24	80
Central Mainland	16	91
West Mainland	11	33
Unst	10	27
Yell	7	32

5.8 Post Visit Destination

At the end of their visit, four-fifths of respondents were travelling home, with VFR (89%) and business (86%) respondents more likely to do so than respondents on holiday (70%). Just over a quarter of holiday respondents (27%) were travelling elsewhere in Scotland, whilst only 8% of business and 6% of VFR respondents did so.

Chart 5.5: Post visit destination
Base: all face-to-face respondents (1,259)



5.9 Type of Visit – Island Comparisons

Viewed by type of visit the results show some similarities across the three locations:

- Visitors on holiday were almost equally likely to be male or female and tended to be aged 45+
- Those on VFR trips were slightly more likely to be female than male on Orkney and the Outer Hebrides and significantly more likely to be female than male on Shetland. On Orkney VFR visitors tended to be older (66% aged 45+) whereas on the Outer Hebrides and Shetland VFR visitors displayed a wider range of ages
- Business visitors were significantly more likely to be male than female on all three locations, with the difference in Orkney and Shetland most pronounced. As one might expect business visitors tended to be aged between 25-64, for instance, 64% on Shetland

Table 5.13: Profile of visitor types (1)
Base: all visitors

	Orkney				Outer Hebrides				Shetland		
	Holiday %	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**
Gender											
Female	50	52	16		48	53	26		48	58	19
Male	50	48	84		52	47	74		52	42	81
Age											
Under 16	8	9	1		11	15	2		3	7	*
16-24	5	5	7		6	8	4		13	14	9
25-34	9	9	20		10	12	17		13	10	22
35-44	11	11	24		11	14	22		9	10	19
45-54	16	17	25		20	15	29		14	16	28
55-64	23	21	19		20	16	17		17	17	17
65+	27	28	4		21	20	10		30	25	5

Additional analysis of residence, social grade and frequency by island location shows that:

- Holiday visitors were most likely to be Scottish on the Outer Hebrides compared to Orkney or Shetland, whilst Orkney had the highest proportion of visitors from Europe and the rest of the world. The social grade of holiday visitors was similar across the three locations with most from the ABC1 groups, though Shetland had significantly fewer A's than the other two islands. Holiday visitors to Orkney and Shetland were equally likely to be making their first visit, whilst nearly half of visitors to the Outer Hebrides were making a repeat visit.
- VFR visitors were most likely to be Scottish in the Outer Hebrides (70%) compared to Shetland (56%) and Orkney (49%). VFR social grade was similar to that of holiday visitors but once again Shetland had significantly fewer A social grade visitors. The vast majority of VFR visitors on the Outer Hebrides were making a repeat visit (91%) compared to Shetland (78%) and Orkney (68%)
- Business visitors were most likely to be Scottish on the Outer Hebrides (81%) compared to Orkney (72%) and Shetland (60%). As before the social grade was similar but Shetland business visitors were less likely to occupy the A group. On all three locations a similar proportion of business visitors were on a repeat visit (between 69-76%)

Table 5.14: Profile of visitor types (2)
Base: all respondents

	Orkney				Outer Hebrides				Shetland		
	Holiday %	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**
Residence											
Scotland	29	49	72		43	70	81		28	56	60
Rest of UK/Ire	33	36	24		38	21	17		40	31	28
Europe	22	8	2		14	2	1		17	7	8
Rest of world	15	8	2		5	5	1		14	6	3
Social grade											
A	35	28	24		33	20	23		17	14	19
B	30	32	31		33	35	31		38	32	27
C1	20	23	15		17	24	19		26	29	23
C2	9	8	25		12	13	24		9	11	25
D	3	3	3		3	3	2		2	6	4
E	2	2	1		1	3	*		2	4	1
Frequency											
This is my first visit	63	32	28		53	9	23		60	21	32
Repeat visit/lived on island	37	68	72		48	91	76		40	78	69

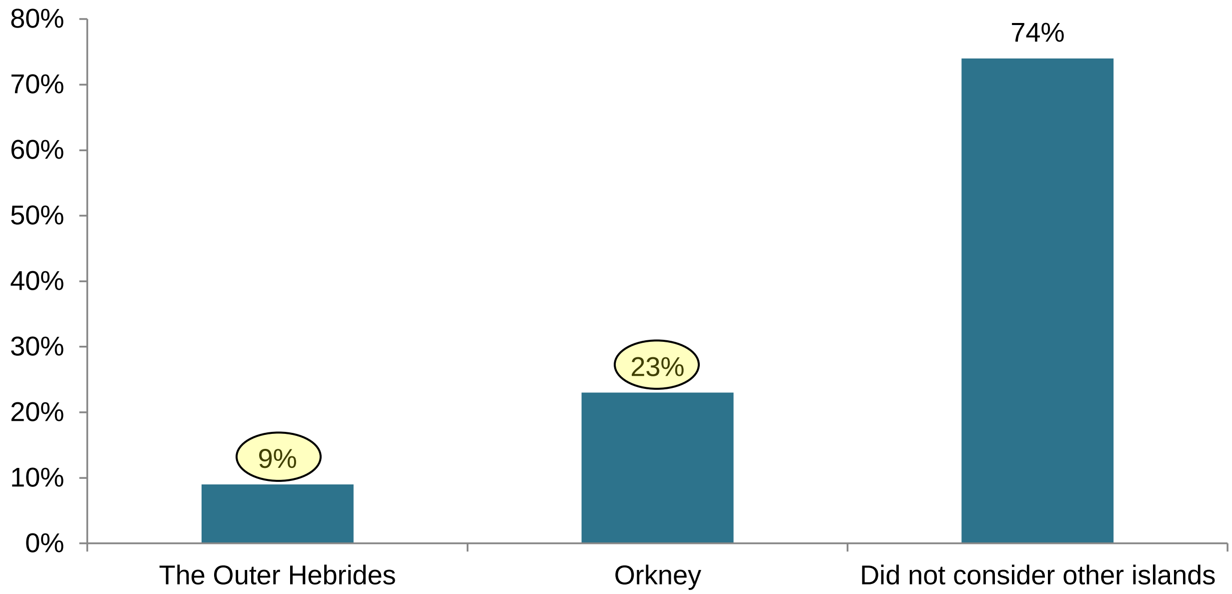
6. PLANNING THE VISIT

6.1 Other Islands Considered

Three quarters of respondents did not consider either Orkney or the Outer Hebrides before choosing to visit Shetland. Nearly a quarter of respondents (holiday and VFR) had considered a visit to Orkney whilst 9% thought about visiting the Outer Hebrides. The result for Orkney is perhaps understandable given the geographic proximity of the two islands but the fact that nearly one in ten respondents considered the Outer Hebrides is interesting given its distance from Shetland.

Perhaps unsurprisingly it was those on holiday that were most likely to consider an alternative destination, with 33% considering Orkney and 12% the Outer Hebrides.

Chart 6.1: Other islands considered
Base: online respondents on holiday or VFR (265)



Respondents from Europe and the rest of the world were most likely to consider an alternative destination, with some having thought about visiting both Shetland and the Outer Hebrides (hence the percentages for these types of respondent adding up to more than 100% in the table below).

Table 6.1: Other islands considered – by respondent residence
Base: online respondents on holiday or VFR (265)

	Scotland %	UK/Ire %	Europe %	RoW %
The Outer Hebrides	5	8	17	13
Orkney	12	23	30	38
Did not consider other islands	87	75	63	55

6.2 Influences on Visit

Over two-fifths of respondents (holiday or VFR) highlighted that an interest in scenery/landscape had influenced their decision to visit Shetland, whilst for a quarter a previous visit or their knowledge of the area was an important factor.

Table 6.2: Influences on visit
Base: online respondents on holiday or VFR (265)

	%
Interest in scenery/landscape	43
Experience of previous visit/know area	25
Interest in the archaeology/history	22
Family connections with the area	21
Recommendation from friend/relative	16
Internet/website	16
Particular events/festivals	13
Specific activities such as walking or golf	12
To undertake particular activities	12
Guide books	9
Tourist Brochure	7
Radio or TV programme about Shetland	6
Interest in particular attractions	5
Promote Shetland direct mail/email	3
Shetland webcams	3
Social media (Facebook/Twitter)	3
Newspaper or magazine article	2
A film/movie or book featuring the area	2
Newspaper or magazine advertisement	2
Interest in geology (Geopark Shetland)	2
To stay in particular accommodation	*
Other reason	14

Table 6.3 displays how the main influences on the decision to visit vary by respondent residence with an interest in scenery and landscape being a major factor for respondents from the UK/Ireland and Europe whilst experience of previous visits and family connections was most important to Scottish residents (who are more likely to have visited before). An interest in archaeology was an influence for a third of respondents from the rest of the world, compared with just a tenth of those from Scotland.

Table 6.3: Influences on visit – by respondent residence
Base: online respondents on holiday or VFR (265)

	Scotland %	UK/Ire %	Europe %	RoW %
Interest in scenery/landscape	21	55	57	47
Experience of previous visit/know area	32	24	23	15
Interest in the archaeology/history	11	26	20	34
Family connections with the area	32	14	13	21

6.3 Timing of Trip Planning

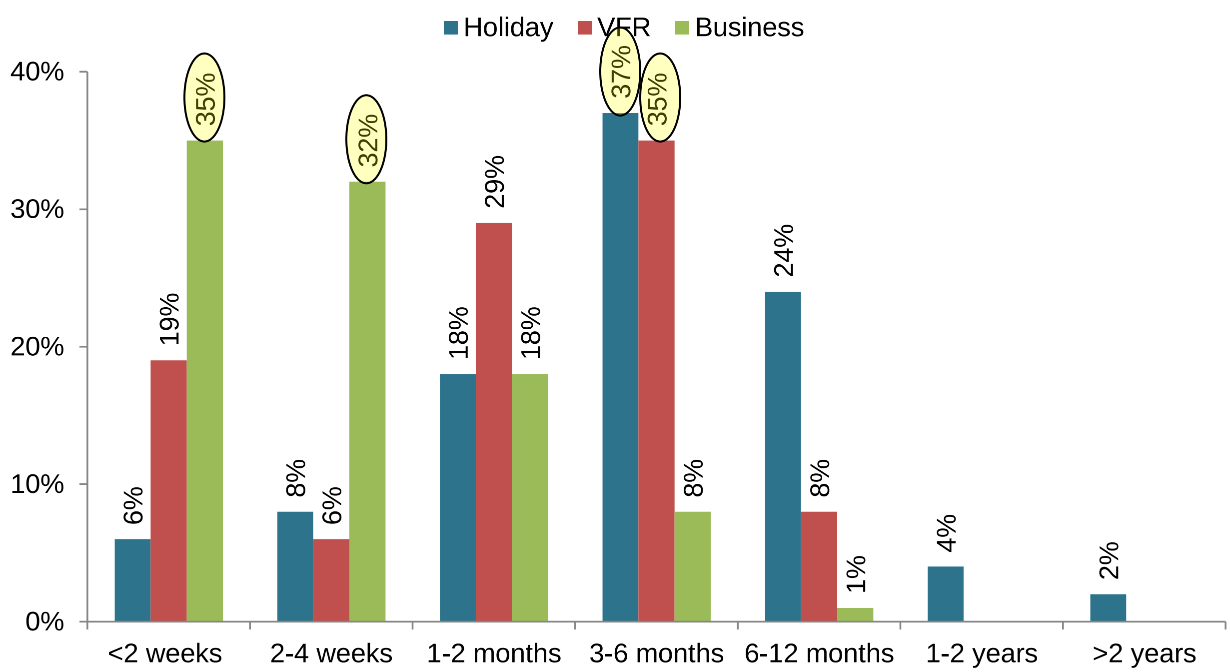
Overall, respondents displayed a variety of approaches to the planning of their trip. Almost half (47%) started planning at least three months in advance whilst almost a third (31%) planned less than 4 weeks in advance.

Table 6.4: Timing of trip planning
Base: all online respondents (368)

	%
Less than 2 weeks	17
2-4 weeks	14
1-2 months	20
3-6 months	29
6-12 months	15
1-2 years	2
More than 2 years	1

There are some obvious differences between type of respondent and planning of trips, as displayed in chart 6.2. Holiday and VFR respondents were most likely to begin planning their trip 3-6 months in advance and in general displayed a similar approach to planning their trips. In contrast, business respondents were much more likely to plan their trip at short notice, with over two-thirds planning their trip within 4 weeks of their visit.

Chart 6.2: Timing of trip planning
Base: all online respondents (368)



6.3.1 Timing of trip planning – domestic vs international

The table below highlights the timing of trip planning for domestic (Scotland, UK/Ireland) and international (Europe/RoW) holiday respondents. The results were very consistent with both types of respondent most likely to plan their trip 3-6 months in advance.

Table 6.5: Timing of trip planning – domestic vs international
Base = holiday respondents (165)

	Scotland UK/Ireland	**Europe/ RoW**
No of respondents	114	51
	%	%
Less than 2 weeks	5	8
2-4 weeks	9	6
1-2 months	20	14
3-6 months	37	37
6-12 months	25	24
1-2 years	4	4
More than 2 years	1	4

6.4 Timing of Trip Booking

As with trip planning, there was little consistency evident in the timing of trip bookings with a third (33%) booking in the month before and almost a fifth (18%) booking less than 2 weeks in advance. Also of note, almost a tenth of respondents did not book in advance at all. In contrast, just over a third (34%) booked more than three months in advance.

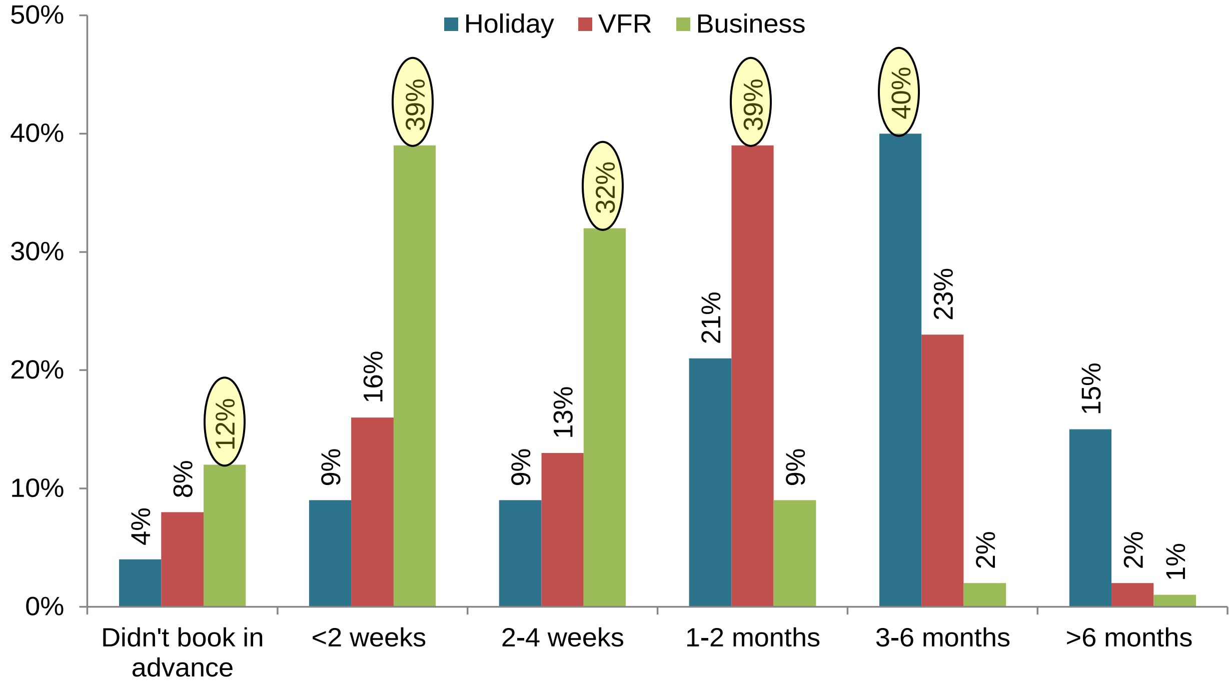
By accommodation type it is interesting to note that respondents booking 4 weeks or less before their visit were more likely to be staying in hotels (43%) compared to guest house/B&Bs or self-catering (24%). Those booking self-catering were much more likely to book at least three months in advance (60%) compared to those booking guest house/B&Bs (46%) or hotels (34%).

Table 6.6: Timing of trip booking
Base: all online respondents (368)

	%
Didn't book in advance	8
Less than 2 weeks	18
2-4 weeks	15
1-2 months	21
3-6 months	26
Over 6 months	8

Holiday respondents were the group most likely to book 3-6 months in advance whilst VFR respondents tended to book closer to their visit (1-2 months in advance). In line with trip planning, business respondents acted very differently, with over 70% making their trip booking 4 weeks (or less) before travelling. Of note, more than one in ten business respondents did not book in advance at all.

Chart 6.3: Timing of trip booking
Base: all online respondents (368)



6.4.1 Timing of trip booking – domestic vs international

The table below highlights the timing of trip booking for domestic (Scotland, UK/Ireland) and international (Europe/RoW) holiday respondents. The results were quite consistent though international respondents were more likely to book their trip three or more months in advance (61%) than domestic respondents (52%).

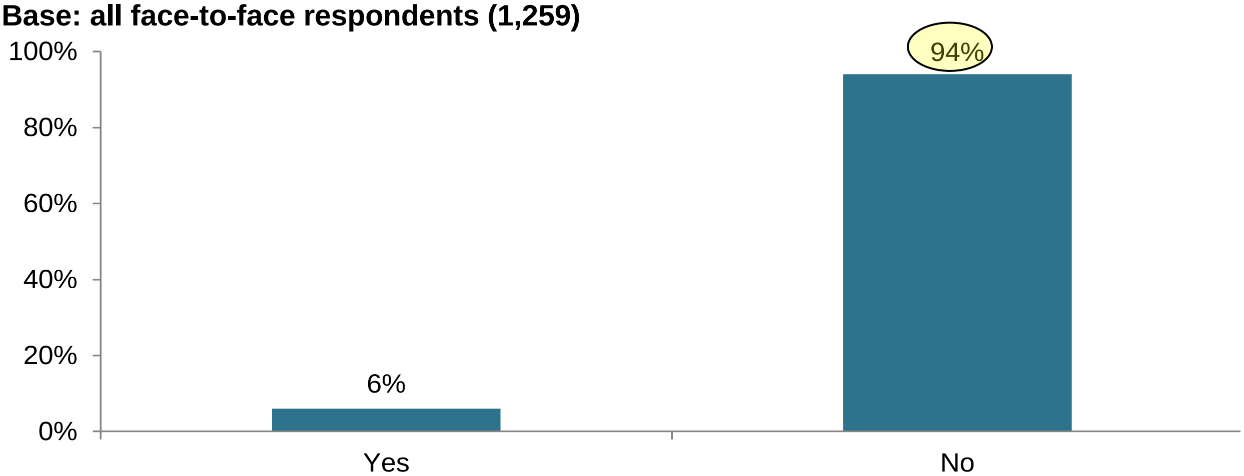
Table 6.7: Timing of trip booking – domestic vs international
Base = holiday respondents (165)

	Scotland UK/Ireland	Europe/ RoW
No of respondents	114	51
	%	%
Didn't book in advance	3	6
Less than 2 weeks	9	10
2-4 weeks	10	8
1-2 months	23	16
3-6 months	37	47
Over 6 months	16	14

6.5 Satisfaction with Travel Planning

The vast majority (94%) of respondents encountered no issues when booking their transport.

Chart 6.4: Issues when booking transport
Base: all face-to-face respondents (1,259)



For the small percentage of respondents who did have issues when booking travel to Shetland there was no one issue that stood out as more prevalent than others.

Table 6.8: Issues when booking travel to Shetland
Base: respondents who had issues when booking travel to Shetland (75)

	%
My first choice of transport type was unavailable	4
No ferries at times/days I wanted	4
The ferries I wanted were too expensive	4
The ferries I wanted were fully booked	4
No ferries on preferred route	-
No flights at times/days I wanted	7
The flights I wanted were too expensive	7
The flights I wanted were fully booked	5
No flights on preferred route	1
Other	71

'Other' issues were mainly difficulties in booking flights online and in some cases being affected by over-bookings e.g. too many passengers on flights. There were also comments on the general difficulty of planning trips to Shetland.

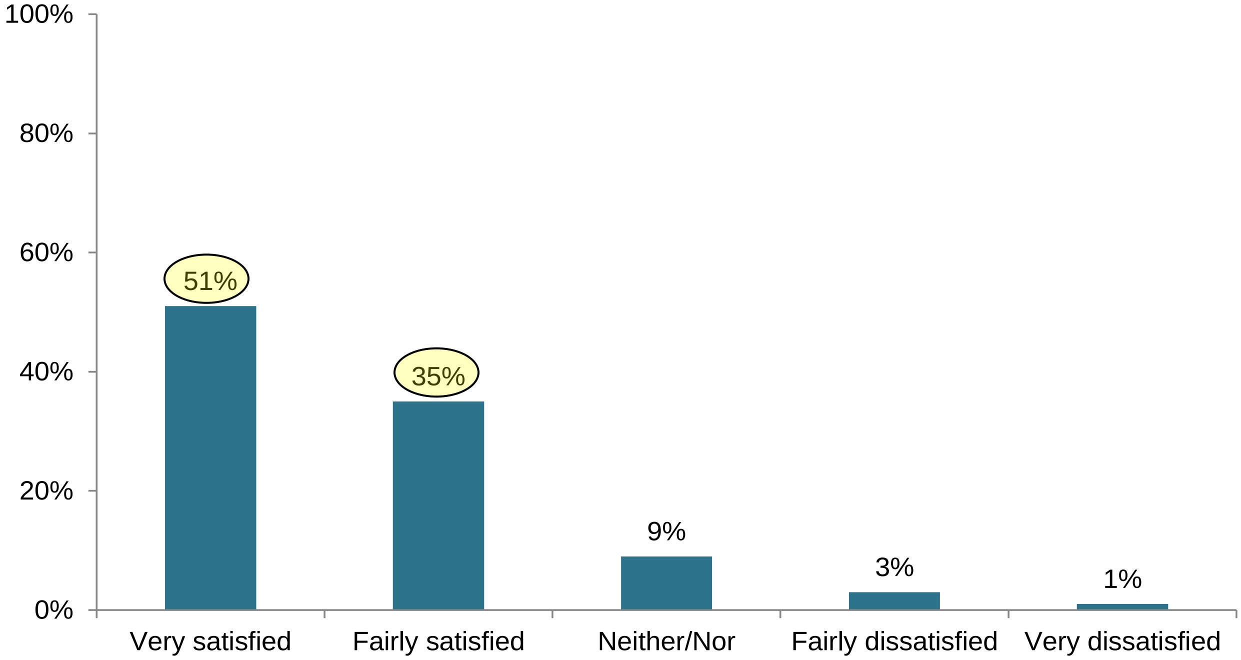
"The internet system sometimes makes the mistake of booking one way each way. They managed to correct it at the terminal."

"Flight overbooked. Not on scheduled flight. May have to be routed through Edinburgh, don't know yet."

"Difficult wanted to stay a bit in Highland but had to book it separately. Unclear website. Recommended Southampton flight even though we are based in London."

6.5.1 Getting to Shetland
The majority of respondents were very or fairly satisfied (86%) with planning getting to Shetland with just a small proportion of respondents showing any dissatisfaction.

Chart 6.5: Satisfaction with getting to Shetland
Base: online respondents who rated getting to Shetland (298)



Holiday respondents demonstrated the highest levels of satisfaction with the planning of getting to Shetland whilst VFR and business respondents showed some dissatisfaction, especially VFR (10%).

Table 6.9: Satisfaction with getting to Shetland - total and by type of visit
Base: online respondents who rated getting to Shetland (298)

	Total %	Holiday %	VFR %	Business %
Very satisfied	51	67	33	36
Fairly satisfied	35	29	40	39
Neither/Nor	9	3	17	20
Fairly dissatisfied	3	2	8	4
Very dissatisfied	1	-	2	2
Mean score (out of 5)	4.33	4.60	3.94	4.04

The main reasons for dissatisfaction with getting to Shetland were problems with specific flights, including timing of flights and cancellations.

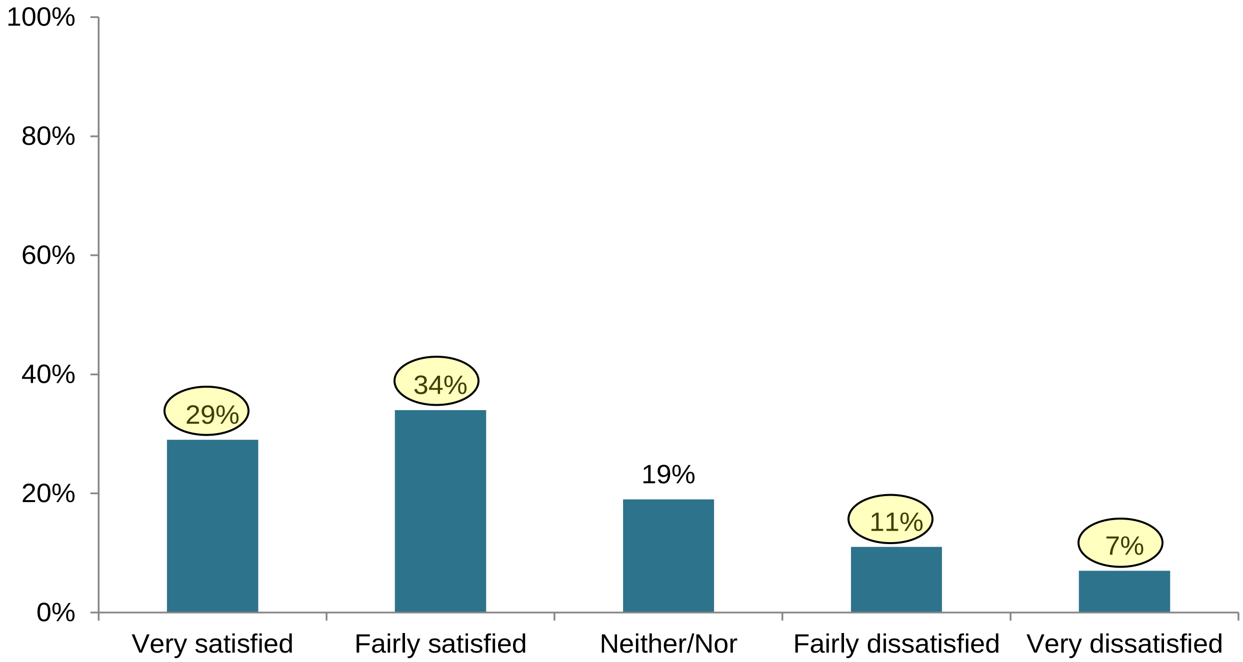
"Flight from Aberdeen to Sumburgh was cancelled due to fog, no-one's fault just frustrating on a short trip."

"Had to fly from Edinburgh instead of Glasgow due to timings of flights from Glasgow."

6.5.2 Availability of convenient air routes

Almost two-thirds of respondents were very or fairly satisfied with the availability of convenient air routes when planning their travel to Shetland, although almost a fifth (18%) were dissatisfied.

Chart 6.6: Satisfaction with availability of convenient air routes
Base: online respondents who rated availability of convenient air routes (209)



Dissatisfaction with air route availability was evident among all visitor types, and especially among VFR respondents (22%). This is reflected in the lower mean score result for this element of their trip planning.

Table 6.10: Satisfaction with availability of convenient air routes - total and by type of visit
Base: online respondents who rated availability of convenient air routes (209)

	Total %	Holiday %	VFR %	Business %
Very satisfied	29	31	24	36
Fairly satisfied	34	38	29	35
Neither/Nor	19	17	24	15
Fairly dissatisfied	11	8	15	7
Very dissatisfied	7	6	7	7
Mean score (out of 5)	3.68	3.80	3.49	3.85

The main reasons for dissatisfaction with availability of air routes was the lack of direct flights to Shetland, inconvenient flight times and flights being fully booked. The cost of flying to Shetland was also mentioned by respondents.

"No direct flights from further south than Edinburgh/Glasgow."

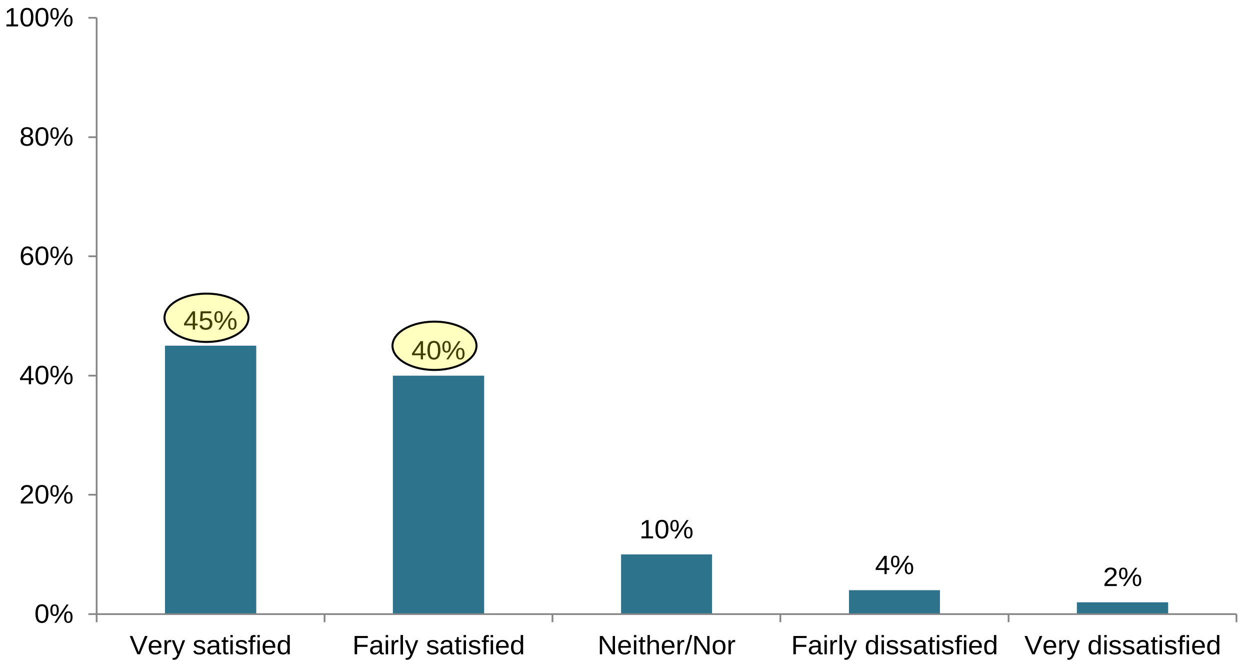
"Timing of flights not convenient to allow reasonable working day without additional overnight stay."

"Because it is so expensive to fly and the times do not match up from London."

6.5.3 Availability of convenient sea routes

Satisfaction with the availability of sea routes when planning trips to Shetland was quite high with 85% of respondents either very or fairly satisfied. Dissatisfaction levels were fairly low.

Chart 6.7: Satisfaction with availability of convenient sea routes
Base: online respondents who rated availability of convenient sea routes (247)



Holiday respondents were most satisfied with the availability of convenient sea routes. VFR and business respondents were more likely to be 'fairly' than 'very' satisfied but dissatisfaction levels were quite low.

Table 6.11: Satisfaction with availability of convenient sea routes - total and by type of visit
Base: online respondents who rated availability of convenient sea routes (247)

	Total %	Holiday %	VFR %	Business %
Very satisfied	45	53	27	38
Fairly satisfied	40	36	54	41
Neither/Nor	10	4	16	16
Fairly dissatisfied	4	4	3	-
Very dissatisfied	2	1	-	5
Mean score (out of 5)	4.22	4.36	4.05	4.05

The main reason for dissatisfaction with availability of sea routes was the lack of ferries to Bergen.

"Wish the ferry from Bergen was still running. Quite a detour to get to Shetland from Scandinavia."

6.6 Planning the Visit – Island Comparisons

An interest in scenery and landscape was a strong influence for respondents on all three locations but archaeology/history was the strongest influence on visits for Orkney respondents.

Table 6.12: Influences on visit
Base: online respondents on holiday or VFR

	Orkney %	Outer Hebrides %	Shetland %
Interest in scenery/landscape	46	50	43
Experience of previous visit	31	39	25
Interest in the archaeology/history	51	21	22
Family connections with the area	18	25	21
Recommendation - friend/relative	24	19	16
Internet/website	18	15	16
Specific activities e.g. walking/golf	10	15	12
Guide books	14	10	9
To undertake particular activities	9	10	12
Interest in particular attractions	15	8	5
Tourist Brochure	11	7	7
Particular events/festivals	4	2	13
Radio/TV programme about…	*	7	6
Particular accommodation	3	6	*
A film/movie/book featuring area	3	4	2
Newspaper or magazine article	3	3	2
Social media (Facebook/Twitter)	1	*	3
Newspaper/magazine advert	*	1	2
Interest in geology	-	-	2
Radio/TV advert about…	*	*	-
Other reason	8	7	14

Approaches to trip planning and booking on the three locations highlight the following:

- In all three locations around a third of holiday and VFR respondents started to plan their trips 3-6 months in advance, although VFR respondents on the Outer Hebrides displayed a variety of approaches to trip planning. There was a sharp contrast between holiday/VFR and business respondents with the latter in all three locations likely to leave their trip planning to within 4 weeks of their visit.
- Holiday respondents in all three locations booked their visits further in advance than VFR or business respondents. As with planning, it was business respondents who booked latest, with the majority of business respondents on all locations leaving trip booking to within 4 weeks of their trip.

Table 6.13: Timing of trip planning & booking
Base: all online respondents

	Orkney				Outer Hebrides				Shetland		
	Holiday %	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**
Timing of planning											
Less than 2 weeks	12	18	38		9	23	46		6	19	35
2-4 weeks	8	9	35		11	22	27		8	6	32
1-2 months	18	25	19		22	25	18		18	29	18
3-6 months	36	33	5		36	23	8		37	35	8
6-12 months	21	14	3		19	5	1		24	8	1
1-2 years	3	1	-		2	1	-		4	-	-
More than 2 years	1	-	-		1	1	-		2	-	-
Timing of booking											
Didn’t book in advance	9	6	7		9	7	7		4	8	12
Less than 2 weeks	13	23	47		14	30	55		9	16	39
2-4 weeks	13	21	33		15	22	23		9	13	32
1-2 months	16	21	8		20	26	12		21	39	9
3-6 months	34	23	8		30	10	2		40	23	2
Over 6 months	13	5	1		11	4	-		15	2	1

A comparison with mean scores on satisfaction with travel planning highlights the following:

- Holiday respondents on each location were most satisfied with getting to the island, whilst VFR and business respondents on Shetland were least satisfied
- On all three locations respondents displayed higher satisfaction with sea routes than air routes, with business respondents displaying the highest levels of satisfaction with air routes on all three locations. In contrast, holiday respondents were most likely to be most satisfied with sea routes on all three locations. The issues causing dissatisfaction were similar on all three island groups with cost and availability featuring most commonly.

Table 6.14: Satisfaction with travel planning
Base: online respondents who rated travel planning

	Orkney				Outer Hebrides				Shetland		
	Holiday	VFR	Business		Holiday	VFR	Business		Holiday	VFR	Business
	Mean score (out of 5)				Mean score (out of 5)				Mean score (out of 5)		
Satisfaction with getting to…	4.55	4.47	4.30		4.67	4.38	4.36		4.60	3.94	4.04
Satisfaction with availability of convenient air routes	3.78	3.43	3.78		3.50	3.40	4.00		3.80	3.49	3.85
Satisfaction with availability of convenient sea routes	4.50	4.39	4.26		4.55	4.28	4.24		4.36	4.05	4.05

7. SOURCES OF INFORMATION

7.1 Sources of Information (pre-visit)

7.1.1 Sources of information pre-visit – 2013

The internet/websites were the most common source of pre-visit information for respondents, with seven-tenths using this source. For almost a third, advice from friends/relatives/others and Tourist Board brochures/leaflets were also important.

- Respondents on holiday (85%) were more likely than business (55%) and VFR (50%) respondents to refer to the internet/websites
- Similarly, holiday respondents were more likely than VFR and business respondents to use tourist board brochures/leaflets, guidebooks and visitor information centres
- VFR respondents (63%) were much more likely than holiday (25%) and business (19%) respondents to speak to friends/relatives/others for advice

Table 7.1: Sources of information (pre-visit) - total and by type of visit
Base: all online respondents (368)

	Total %	Holiday %	VFR %	Business %
Internet/websites	70	85	50	55
Friends/relatives/advice from others	31	25	63	19
Tourist Board brochures/leaflets	29	41	16	15
Guidebooks	24	44	5	4
Visitor Information Centre	14	21	8	4
Travel operators (ferries, airlines)	11	13	13	8
Social media (Facebook/Twitter)	11	10	15	7
Promote Shetland Pocket Guide	10	15	6	4
Other information source	7	7	5	9
Promote Shetland email/telephone	4	7	2	-
Travel Agent	2	3	2	2
None of the above	13	1	19	24

Respondents from outwith Scotland were considerably more likely to use the internet/websites to source information pre-visit.

Table 7.2: Sources of information (pre-visit) – by respondent residence
Base: all online respondents (368)

	Scotland	UK/Ire	Europe	RoW
Base	**141**	**139**	**32**	**56**
	%	%	%	%
Internet/websites	54	78	78	82
Friends/relatives/advice from others	33	30	25	29
Tourist Board brochures/leaflets	21	38	22	30
Guidebooks	9	34	41	29
Visitor Information Centre	6	18	19	20
Travel operators (ferries, airlines)	10	12	13	13
Social media (Facebook/Twitter)	8	15	6	9
Promote Shetland Pocket Guide	8	12	16	9
Other information source	4	10	9	4
Promote Shetland email/telephone	2	4	13	2
Travel Agent	1	1	6	4
None of the above	23	6	3	7

7.1.2 Sources of information pre-visit - comparison with previous visitor surveys

The question on pre-visit sources of information was inserted in the online survey in 2013 and the differences in methodology between 2013 and 2006 should be noted.

Use of the Internet almost doubled between 2006 and 2013, making the Internet by far the most important source of information for visitors. All other major printed sources have decreased in use since 2006, most notably Tourist Board brochures/leaflets which had decreased by 10%.

Table 7.3: Sources of information pre-visit - comparison with previous visitor surveys
Base: all online respondents - 2013/ all respondents - 2006

	2013	**2006**
Number of respondents	368	1245
	%	%
Internet/websites	70	39
Tourist Board brochures/leaflets	29	39
Friends/relatives/advice from others	31	26
Guidebooks	24	30
Visitor Information Centre	14	22
None	13	30

7.2 Online Research

Respondents who used the internet as a source of information highlighted a range of research topics.

- In general, respondents on holiday were more likely to have conducted online research
- Accommodation was a key research topic for holiday (77%) and business (72%) respondents but not for VFR respondents, many of whom were staying with friends and relatives
- Activities were the most common research topic for VFR respondents with almost two-fifths researching this online

Table 7.4: Online research topics - total and by type of visit
Base: online respondents who used the internet/websites (256)

	Total %	Holiday %	VFR %	Business %
Accommodation	67	77	29	72
History/culture	34	39	29	13
Visitor centres/attractions	32	41	23	21
Natural history	29	39	16	15
Activities	28	34	39	9
Transport to destination	26	33	13	17
Festivals/Events	25	29	26	9
Transport from destination	21	26	10	11
Genealogy/family history	3	3	10	-

Viewed by residence, the results indicate that respondents from the rest of the world were more likely than others to research history/culture, activities and genealogy, whilst Scottish residents seemed less interested in finding out about natural history and transport to/from Shetland than other respondents.

Table 7.5: Online research topics – by respondent residence
Base: online respondents who used the internet/websites (256)

	Scotland	UK/Ire	Europe	RoW
Base	**76**	**109**	**25**	**46**
	%	%	%	%
Accommodation	63	66	72	74
History/culture	20	37	24	54
Visitor centres/attractions	22	39	28	30
Natural history	14	38	32	30
Activities	22	21	32	52
Transport to destination	17	28	36	30
Festivals/Events	24	24	24	28
Transport from destination	12	24	28	26
Genealogy/family history	3	-	-	13

7.3 Online Booking

In line with the most common topics respondents had researched online (see table 7.4), accommodation was the booking they were most likely to make via the internet.

- Booking accommodation was most common amongst respondents on holiday, though less common for VFR (staying with friends/family) and business respondents (booked on their behalf)
- Accommodation and transport were the only arrangements that a significant proportion of respondents booked online

Table 7.6: Online booking - total and by type of visit
Base: online respondents who used the internet/websites (256)

	Total %	Holiday %	VFR %	Business %
Accommodation	48	61	13	32
Transport to destination	23	25	13	23
Transport from destination	18	18	10	17
Festival/Event tickets	7	9	3	2
Activities	4	6	-	-
Visitor centres/visitor attractions	3	3	3	4
Other	7	6	13	2
None of the above	32	23	52	45

Viewed by respondents' residence the results show that respondents from the rest of the world (74%) and Europe (60%) were much more likely than respondents from Scotland (36%) or the UK/Ireland (44%) to book accommodation online.

Table 7.7: Online booking - by respondent residence
Base: online respondents who used the internet/websites (256)

	Scotland %	UK/Ire %	Europe %	RoW %
Accommodation	36	44	60	74
Transport to destination	17	28	20	24
Transport from destination	17	21	12	13
Festival/Event tickets	5	8	-	9
Activities	4	2	8	4
Visitor centres/visitor attractions	3	3	-	4
Other	5	6	4	13
None of the above	41	31	32	22

7.4 Websites Used

The main websites which respondents used to research and/or book their visit were as follows:

Table 7.8: Websites used for research/booking
Base: online respondents who used the internet/websites (256)

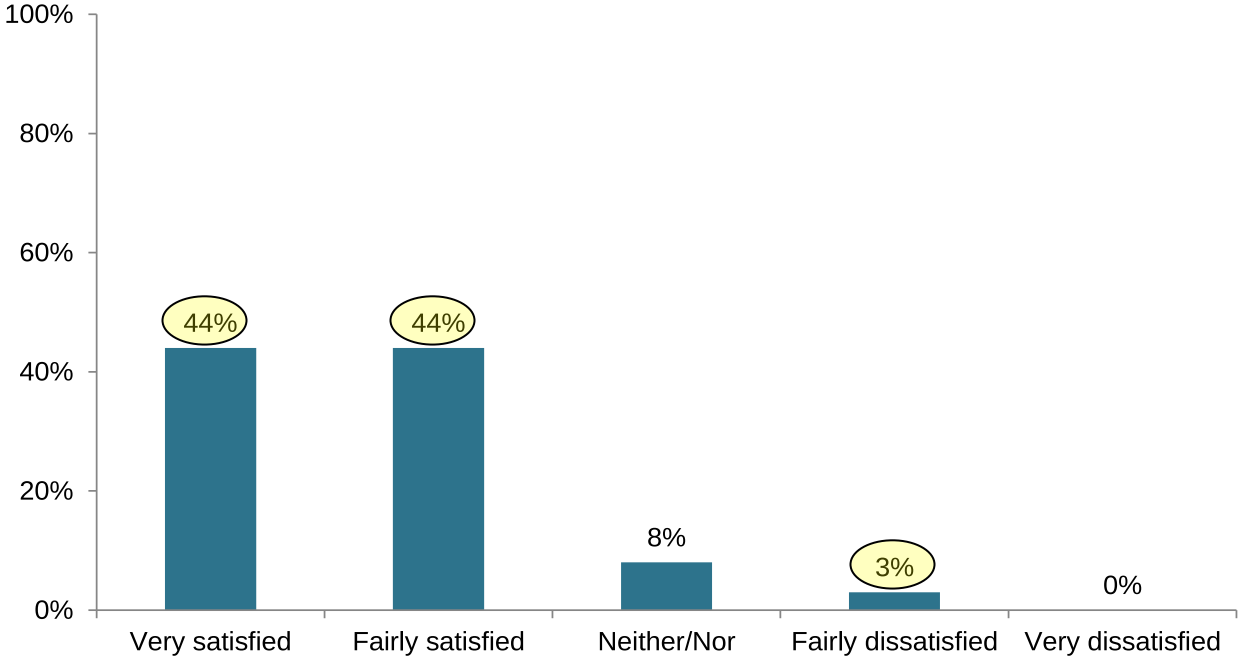
Website	%
NorthLink Ferries	18
Google	13
VisitScotland	11
tripadvisor	9
flybe.	9
Visit Shetland 	8

7.5 Satisfaction with Information Sources

7.5.1 Availability of information online

Overall, 88% of respondents were very or fairly satisfied with the availability of online information when planning their trip with just 3% displaying any dissatisfaction.

Chart 7.1: Satisfaction with availability of online information
Base: online respondents who rated availability of online information (300)



Almost half of holiday respondents were very satisfied with the availability of online information, whilst business and VFR respondents displayed slightly lower levels of satisfaction (as indicated in overall mean scores). While the vast majority in all groups were at least fairly satisfied, dissatisfaction, where evident, was most apparent among holiday and business respondents.

Table 7.9: Satisfaction with availability of online information - total and by type of visit
Base: online respondents who rated availability of online information (300)

	Total %	Holiday %	VFR %	Business %
Very satisfied	44	49	30	41
Fairly satisfied	44	41	58	46
Neither/Nor	8	6	12	8
Fairly dissatisfied	3	5	-	3
Very dissatisfied	*	-	-	2
Mean score (out of 5)	4.28	4.34	4.19	4.21

Comments on the availability of online information showed that information on accommodation was the main area of dissatisfaction.

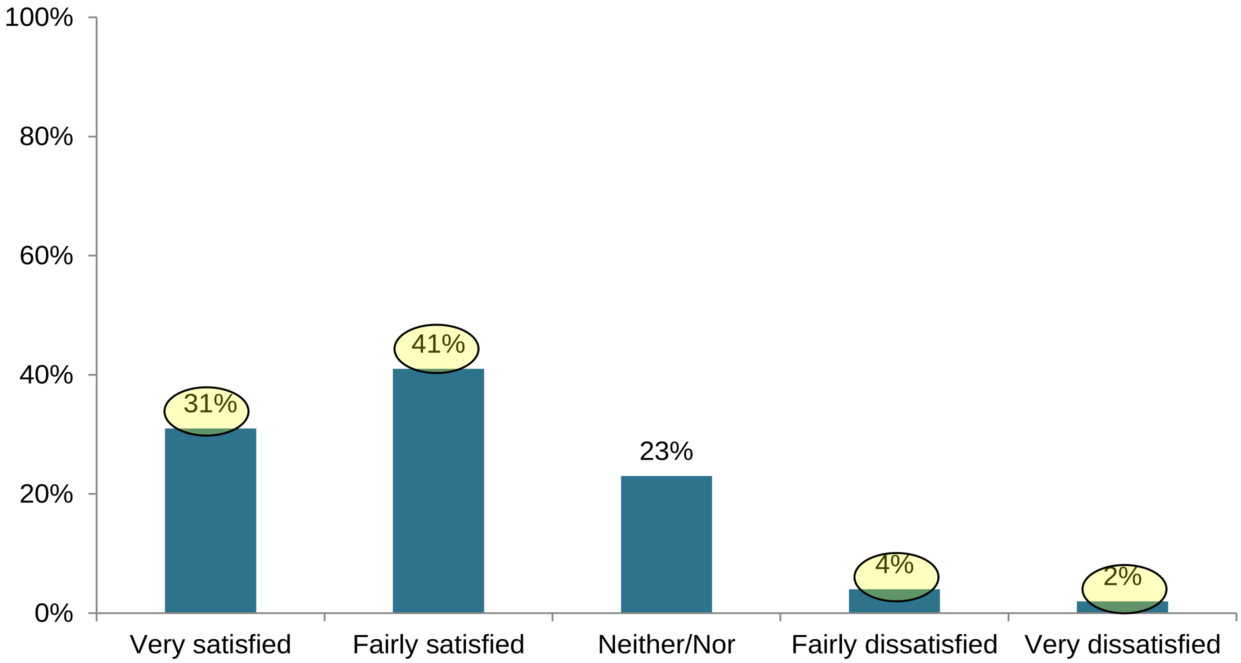
“Some difficulties in establishing which hotels actually had accommodation available.”

"We were misled by the description of our accommodation."

7.5.2 Availability of information offline

Overall, 72% of respondents were very or fairly satisfied with the availability of offline information when planning their trip with 6% displaying dissatisfaction.

Chart 7.2: Satisfaction with availability of offline information
Base: online respondents who rated availability of offline information (229)



Satisfaction levels were broadly consistent across all visitor types. Where dissatisfaction was evident, it was most apparent among business and holiday respondents.

Table 7.10: Satisfaction with availability of offline information - total and by type of visit
Base: online respondents who rated availability of offline information (229)

	Total %	Holiday %	VFR %	Business %
Very satisfied	31	29	31	35
Fairly satisfied	41	39	43	43
Neither/Nor	23	26	23	13
Fairly dissatisfied	4	5	3	4
Very dissatisfied	2	1	-	4
Mean score (out of 5)	3.95	3.90	4.03	4.00

Comments on dissatisfaction with the availability of offline information highlighted a lack of information from travel agents/airlines/tourist information.

"In Canada, there is precious little information available about Shetland...travel agents are generally uninformed about that part of Scotland."

"Travel agents didn't have a lot of information. Nowhere else to look or book flights than online."

"Poor resources in tourist information and poor signposting of attractions when we got there."

7.6 Sources of Information (during visit)

Respondents were asked how they had obtained information about places to visit and things to do during their visit to Shetland. Table 7.11 shows that a wide variety of sources were used. Viewed by visitor type there are some notable differences

- In general, holiday respondents were most likely to seek out sources of information during their visit, with only 2% sourcing no information during their visit, compared to 16% of VFR and 26% of business respondents
- The table below shows that holiday respondents were much more likely than VFR or business respondents to source information from visitor information centres, local heritage information, brochures, proprietors, guidebooks and visitor information points
- Holiday respondents' most likely source of information was from a visitor information centre (52%) whilst VFR respondents were most likely to ask locals (48%) and business respondents used smartphones/mobile internet (41%)

Table 7.11: Sources of information (during visit) – total and by type of visit
Base: all online respondents (368)

	Total %	Holiday %	VFR %	Business %
Asking locals	42	48	48	26
A smartphone/Internet on a mobile phone	34	35	32	41
Visitor Information Centre	32	52	16	4
A laptop	31	28	32	33
Local heritage information – leaflets	28	41	16	7
Brochure e.g. VisitScotland	27	39	16	13
An iPad/tablet PC	20	24	21	12
Asking proprietors/service staff	20	28	11	14
Locally produced guide books	16	27	10	5
Guide Books e.g. Lonely Planet	15	31	2	-
Asking other travellers	13	18	13	6
Internet – public/accommodation	12	15	10	7
Visitor Information Point	10	16	6	1
Social media	7	6	15	2
Cafe with Internet access	6	8	2	5
Tour operator's brochure	5	8	-	1
The VisitScotland Day out app	1	3	-	-
None of the above	13	2	16	26

7.7 Sources of Information – Island Comparisons

The behaviour displayed by respondents in terms of their sources of information pre and during visit was similar across the three locations.

Pre-visit

- Internet/websites were the most common source of pre-visit information for respondents on holiday and also for business respondents (though usage levels were much lower amongst business respondents). This was the case on all three locations
- For VFR respondents on each location 'advice from friends/relatives/others' was the most common source of pre-visit information

Table 7.12: Sources of information - pre and during visit
Base: all online respondents

	Orkney				Outer Hebrides				Shetland		
	Holiday %	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**
Sources of information - pre											
Internet/websites	83	51	51		77	38	48		85	50	55
Advice from friends/relatives/others	33	71	24		33	64	22		25	63	19
Tourist Board brochures/leaflets	46	20	10		33	11	8		41	16	15
Guidebooks	45	23	3		43	5	6		44	5	4
Travel operators (ferries, airlines)	12	8	8		18	6	12		13	13	8
Visitor Information Centre	18	9	4		17	3	2		21	8	4
Social media (Facebook/Twitter)	3	5	3		4	9	-		10	15	7
Travel Agent	2	1	3		2	-	1		3	2	2
None	4	14	31		5	23	29		1	19	24

During visit

- Holiday respondents referred to a wide range of sources during their visits but in all locations Visitor Information Centres were the most common source (along with brochures in Orkney). Brochures, local heritage leaflets, asking locals and smartphones/mobile internet were also used by at least a third
- Respondents behaviour was similar in all three locations with similar proportions of respondents accessing information during their visit and using similar sources regardless of their location

Table 7.13: Sources of information - pre and during visit
Base: all online respondents

	Orkney				Outer Hebrides				Shetland		
	Holiday %	VFR %	Business %		Holiday %	VFR %	Business %		Holiday %	VFR %	Business %
Sources of Information - during											
Visitor Information Centre	47	16	7		42	14	4		52	16	4
Brochure e.g. VisitScotland	47	21	6		36	5	7		39	16	13
A smartphone/mobile Internet	37	36	32		37	32	31		35	32	41
Local heritage information - leaflets	44	23	6		35	8	8		41	16	7
Asking locals	34	50	21		40	37	34		48	48	26
A laptop	26	29	30		28	25	23		28	32	33
An iPad/tablet PC	30	20	14		27	23	8		24	21	12
Guide Books e.g. Lonely Planet	34	11	1		31	4	1		31	2	-
Locally produced guide books	24	15	7		19	3	7		27	10	5
Asking proprietors/service staff	23	5	13		27	8	15		28	11	14
Visitor Information Point	24	8	1		18	5	1		16	6	1
Internet – public/accommodation	19	10	6		15	6	7		15	10	7
Asking other travellers	11	5	5		16	3	3		18	13	6
Cafe with Internet access	8	4	4		8	4	3		8	2	5
Tour operator's brochure	8	1	-		4	1	2		8	-	1
Social media	2	5	4		3	8	3		6	15	2
The VisitScotland Day out app	4	-	4		4	1	-		3	-	-
None of the above	4	20	29		7	25	31		2	16	26

A comparison of online research topics and bookings on the three locations highlights the following:

- Accommodation was most likely to be researched and booked by holiday respondents. The proportions of holiday respondents doing this were very similar on each island location
- Researching and booking transport to/from the island was much more common on Orkney than on the Outer Hebrides or Shetland. This was the case for holiday, VFR and business respondents. Orkney does have more transport operators but it is unclear if this alone explains the large differences in behaviour
- Holiday and VFR respondents on Shetland were much more likely than elsewhere to research festivals and events

Table 7.14: Online research and bookings
Base: online respondents who used the internet/websites

	Orkney				Outer Hebrides				Shetland		
	Holiday %	VFR %	Business %		Holiday %	VFR %	Business %		Holiday %	VFR %	Business %
Online research topics											
Accommodation	77	35	76		78	35	63		77	29	72
Transport to destination	86	80	78		28	17	11		33	13	17
Transport from destination	71	69	63		25	7	5		26	10	11
History/culture	52	27	4		32	13	16		34	39	29
Visitor centres/attractions	50	27	7		32	27	9		41	23	21
Activities	31	20	17		32	17	7		34	39	9
Natural history	32	22	4		27	10	11		39	16	15
Festivals/Events	17	12	4		16	22	7		29	26	9
Genealogy/family history	4	8	-		3	8	-		3	10	-
Online booking											
Accommodation	67	29	39		62	23	46		61	13	32
Transport to destination	73	82	52		24	15	21		25	13	23
Transport from destination	67	73	43		20	12	14		18	10	17
Festival/Event tickets	1	2	2		1	5	-		9	3	2
Activities	4	-	2		2	2	-		6	-	-
Visitor centres/visitor attractions	4	-	-		1	-	-		3	3	4
None of the above	15	16	26		21	47	35		23	52	45

A comparison with mean scores on satisfaction with information sources highlights the following:

- Satisfaction with the availability of online information was similar across the three locations with the exception of VFR and business respondents on Shetland, where satisfaction was lower than that of holiday respondents
- On all three locations satisfaction with the availability of offline information was lower (than for satisfaction with online information). This was especially the case for business respondents on Orkney and holiday respondents on the Outer Hebrides and Shetland

Table 7.15: Satisfaction with information sources
Base: online respondents who rated information sources

	Orkney				Outer Hebrides				Shetland		
	Holiday	**VFR**	**Business**		**Holiday**	**VFR**	**Business**		**Holiday**	**VFR**	**Business**
	Mean score (out of 5)				Mean score (out of 5)				Mean score (out of 5)		
Satisfaction with availability of online information	4.43	4.46	4.27		4.39	4.40	4.40		4.34	4.19	4.21
Satisfaction with availability of offline information	4.15	4.13	3.96		3.99	4.16	4.13		3.90	4.03	4.00

8. COMMUNICATION

8.1 Use of Social Media

During or after their visit, 43% of respondents had communicated about their visit using social media, with photo uploads and Facebook updates the most common forms of social media used.

- VFR respondents were more likely than holiday and business respondents to use social media with almost half communicating about their visit on Facebook
- There was a clear pattern by respondent age with uploading trip photos and updating Facebook much more common for those aged 16-24 (53% and 63% respectively) than for those aged 65+ (14% and 5%).

Table 8.1: Use of social media – total and by type of visit
Base: all online respondents (368)

	Total %	Holiday %	VFR %	Business %
Uploaded trip photos to the Internet	33	35	45	26
Updated Facebook status about trip	32	29	47	27
Tweeted about your trip	5	5	5	5
Blogged about your trip	4	4	2	1
None of these	57	58	42	65

All respondents, regardless of residence, displayed a tendency to use social media as a means of communicating about their visit to Shetland. In particular, over half of respondents from the rest of the world used social media, with uploading photos particularly popular.

Table 8.2: Use of social media – by respondent residence
Base: all online respondents (368)

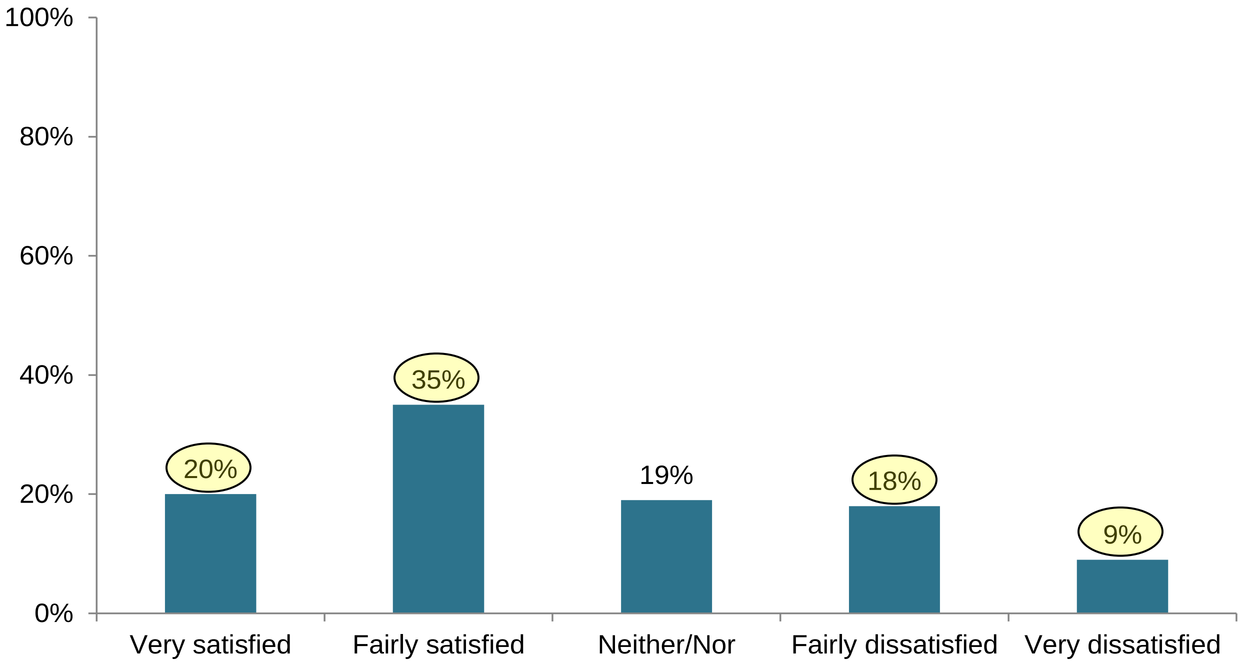
	Scotland %	UK/Ire %	Europe %	RoW %
Uploaded trip photos to the Internet	28	35	31	43
Updated Facebook status about trip	32	29	22	41
Tweeted about your trip	5	8	-	-
Blogged about your trip	1	3	3	11
None of these	62	56	66	45

8.2 Satisfaction with Communications

8.2.1 Availability of mobile phone reception

Overall satisfaction with the availability of mobile phone reception was mixed with 55% of respondents satisfied (only a fifth were very satisfied), but 27% dissatisfied.

Chart 8.1: Satisfaction with availability of mobile phone reception
Base: online respondents who rated availability of mobile phone reception (333)



Respondents on holiday were most satisfied with mobile phone reception. Dissatisfaction was evident among all visitor types, but especially so among VFR and business respondents (33% and 30% compared with 20% for holiday respondents).

Table 8.3: Satisfaction with availability of mobile phone reception - total and by type of visit
Base: online responses who rated availability of mobile phone reception (333)

	Total %	Holiday %	VFR %	Business %
Very satisfied	20	26	12	18
Fairly satisfied	35	33	38	39
Neither/Nor	19	21	17	13
Fairly dissatisfied	18	12	26	19
Very dissatisfied	9	8	7	11
Mean score (out of 5)	3.38	3.56	3.22	3.34

The main reason for dissatisfaction with mobile phone reception was the 'patchy' phone connection or complete lack of connection. These comments related to all the main providers.

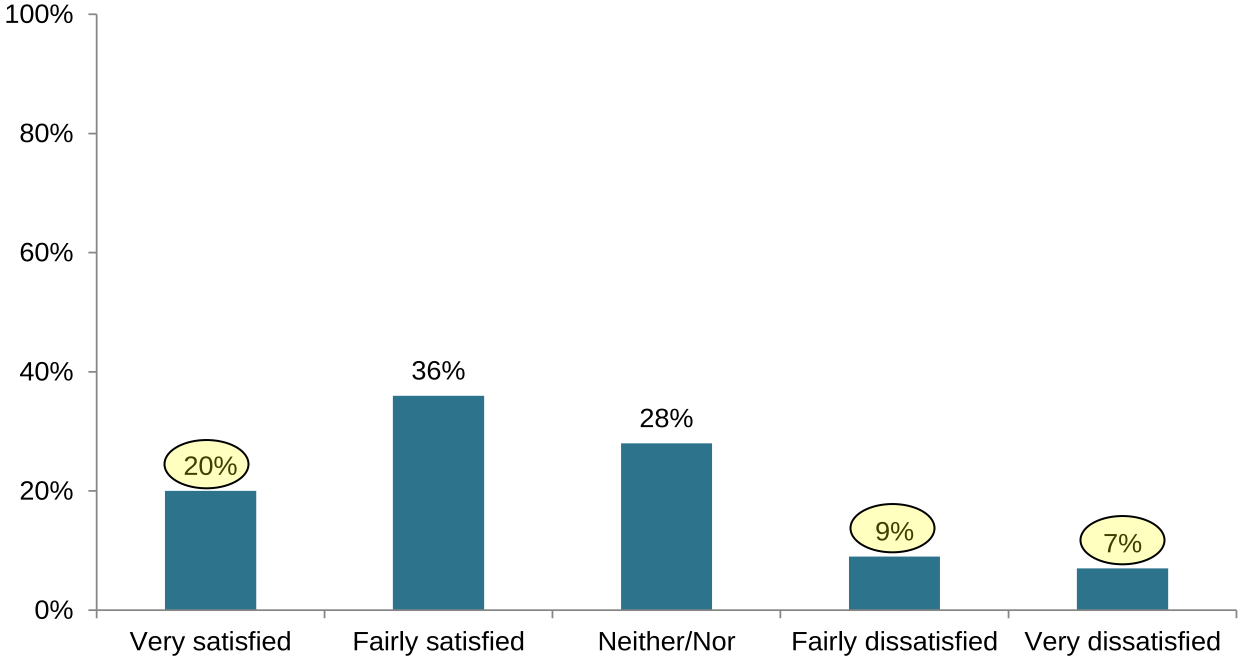
"Because it was very patchy, not to say poor."

"Certain urban areas had no coverage."

8.2.2 Availability of WiFi/broadband access

As with mobile phone reception, satisfaction with the availability of WiFi/broadband was mixed, with 56% satisfied (only a fifth were very satisfied) and 16% dissatisfied.

Chart 8.2: Satisfaction with availability of WiFi/broadband access
Base: online respondents who rated availability of WiFi/broadband access (288)



Overall satisfaction levels were broadly consistent across all visitor types, although a notable proportion of each were dissatisfied with the availability of WiFi/broadband during their visit. Almost a fifth of business respondents were dissatisfied, compared with 16% of VFR and 14% of holiday respondents.

Table 8.4: Satisfaction with availability of WiFi/broadband access - total and by type of visit
Base: online respondents who rated availability of WiFi/broadband access (288)

	Total %	Holiday %	VFR %	Business %
Very satisfied	20	22	12	20
Fairly satisfied	36	34	47	37
Neither/Nor	28	31	25	24
Fairly dissatisfied	9	8	16	9
Very dissatisfied	7	6	-	9
Mean score (out of 5)	3.52	3.57	3.55	3.49

The main reasons for dissatisfaction were the very limited access to WiFi and the slowness of connections.

"I was unable to get a 3G signal on my laptop dongle which is on the 3 network."

"WiFi access in the hotels I have stayed in at Lerwick has been very poor."

8.3 Communication – Island Comparisons

Respondent's use of social media on all three islands was similar:

- Uploading trip photos and updating Facebook were the most common uses of social media and similar proportions of holiday, VFR and business respondents were doing this on each island.
- On Orkney holiday and VFR respondents were equally likely to use social media in relation to their visit whilst on the Outer Hebrides and Shetland it was VFR respondents alone who were the most likely group to use social media

Table 8.5: Use of Social Media
Base: all online respondents

	Orkney				Outer Hebrides				Shetland		
	Holiday %	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**
Uploaded trip photos to Internet	32	32	24		33	34	20		35	45	26
Updated Facebook about trip	25	29	22		25	37	28		29	47	27
Tweeted about your trip	2	3	9		4	4	5		5	5	5
Blogged about your trip	4	-	1		2	1	1		4	2	1
None of these	59	59	67		60	53	62		58	42	65

A comparison with mean scores on satisfaction with communications highlights the following:

- Holiday respondents were most satisfied with the availability of mobile phone reception and WiFi/broadband on Orkney and Shetland
- On the Outer Hebrides, holiday, VFR and business respondents displayed similar levels of satisfaction with communications

Table 8.6: Satisfaction with communications
Base: online respondents who rated communication

	Orkney				Outer Hebrides				Shetland		
	Holiday	**VFR**	**Business**		**Holiday**	**VFR**	**Business**		**Holiday**	**VFR**	**Business**
	Mean score (out of 5)				Mean score (out of 5)				Mean score (out of 5)		
Satisfaction with availability of mobile phone reception	3.89	3.36	3.57		3.33	3.34	3.32		3.56	3.22	3.34
Satisfaction with availability of WiFi/broadband access	3.73	3.46	3.27		3.30	3.22	3.33		3.57	3.55	3.49

9. TRANSPORT

9.1 Arriving and Departing

Flights were a slightly more common form of transport for respondents arriving in and departing Shetland, with just over half using this form of transport. Aberdeen was the most likely flight arrival/destination for respondents. It should be noted that these results highlight the transport options chosen by survey respondents and are not meant to provide representative results on overall transport methods.

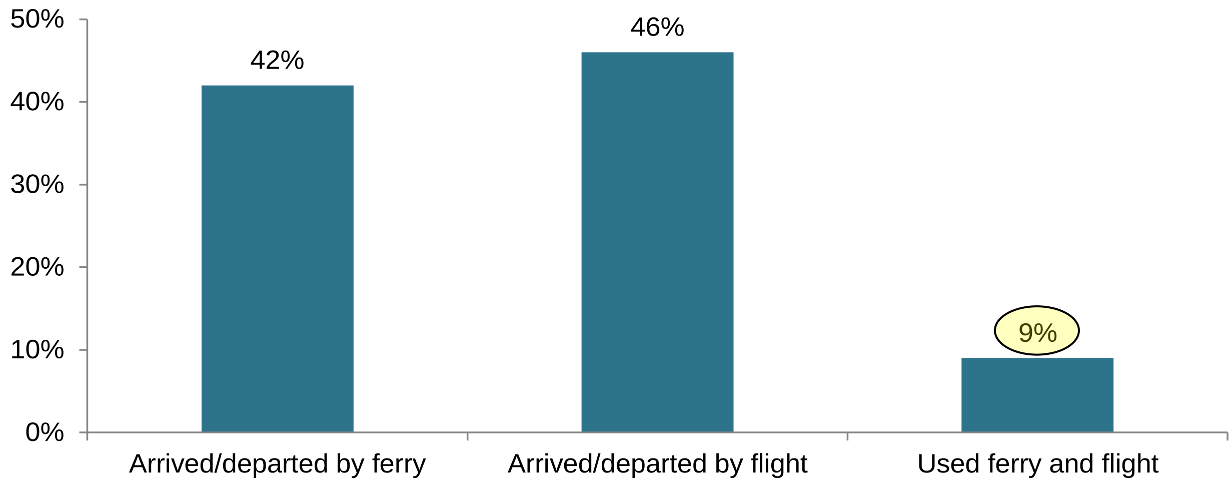
Table 9.1: Arrival and departure points
Base: all face-to-face respondents (1,259)

	Arrived from %	Departed to %
Ferry	44	48
- Aberdeen - ferry	*41*	*44*
- Kirkwall - ferry	*3*	*4*
Flight	52	51
- Edinburgh - flight	*15*	*15*
- Aberdeen - flight	*23*	*21*
- Glasgow - flight	*6*	*5*
- Inverness - flight	*5*	*6*
- Kirkwall - flight	*3*	*3*
- Bergen - flight	*	*1*

Chart 9.1 shows the percentage of respondents who arrived and departed Shetland using the same form of transport. Of note, almost a tenth of respondents had used both ferry and flight to travel to/from Shetland.

- Respondents on holiday were more likely to be arriving/departing by ferry (59%) than VFR (39%) or business (29%) respondents
- Business (54%) and VFR (52%) respondents were most likely to be arriving/departing on a flight

Chart 9.1: Arrival and departure methods
Base: all face-to-face respondents (1,259)



Transport methods to/from Shetland varied over the research period with the most notable trend being higher use of ferries between October-March (compared to April-September) and a peak for flight usage between July-September.

Table 9.2: Arrival and departure methods – by quarter
Base: all face-to-face respondents (1,259)

	Q1 % Oct-Dec	Q2 % Jan-Mar	Q3 % Apr-Jun	Q4 % Jul-Sep
Arrived/departed by ferry	51	52	43	35
Arrived/departed by flight	40	36	45	52
Used ferry and flight	8	11	9	8

9.2 Satisfaction with Departure Points

Respondent satisfaction with the facilities and services at their departure points varied, with high satisfaction levels for Holmsgarth ferry but lower levels of satisfaction for Sumburgh airport. The main reasons for dissatisfaction with Sumburgh were the feeling it was 'dilapidated' and the poor quality of food and drink outlets.

Just a hall, not a place to be stuck in. Catering not good."

"(Sumburgh airport) looks old and tired and ready for a facelift especially international arrivals. Broken window not a good impression but I like the dialect decor."

Table 9.3: Satisfaction with departure point facilities and services
Base: face-to-face respondents at departure

	Sumburgh Airport	Holmsgarth Ferry
Number of respondents	659	600
	%	%
Very satisfied	42	71
Fairly satisfied	40	24
Neither/Nor	10	2
Fairly dissatisfied	6	1
Very dissatisfied	*	-

Respondents to the online survey were also asked about their satisfaction with the departure points they had used. Table 9.4 shows that in general the vast majority of respondents would be happy to recommend the airport and especially the ferry terminal.

Table 9.4: Likelihood of recommending departure point to others
Base: online respondents using departure points

	Sumburgh Airport	Holmsgarth Ferry
Number of respondents	159	205
	%	%
Yes	91	99
No	9	1

Respondents' reasons for not recommending their departure point included poor customer service, poor quality food and lack of facilities.

"Bad customer service. Few amenities. Poor choice of food and drink. Over officious security staff."

"There is not much to do there (Sumburgh) if delayed for long period and food is basic but expensive."

"It (Sumburgh) is very basic and quite impersonal."

9.3 Transport during Visit

Car, whether own/friends/firms or hired, was the main form of transport for over half of all respondents. VFR respondents (67%) were more likely to be using a car (own/friends/firms) than respondents on business (39%) or holiday (24%).

Over half of respondents had no secondary form of transport whilst on their visit, however, walking (21%) was the most common 'other' form of transport used.

- Holiday respondents (27%) were more likely to have spent time walking during their visit than VFR (19%) or business (18%) respondents

Table 9.5: Transport during visit
Base: all face-to-face respondents (1,328)

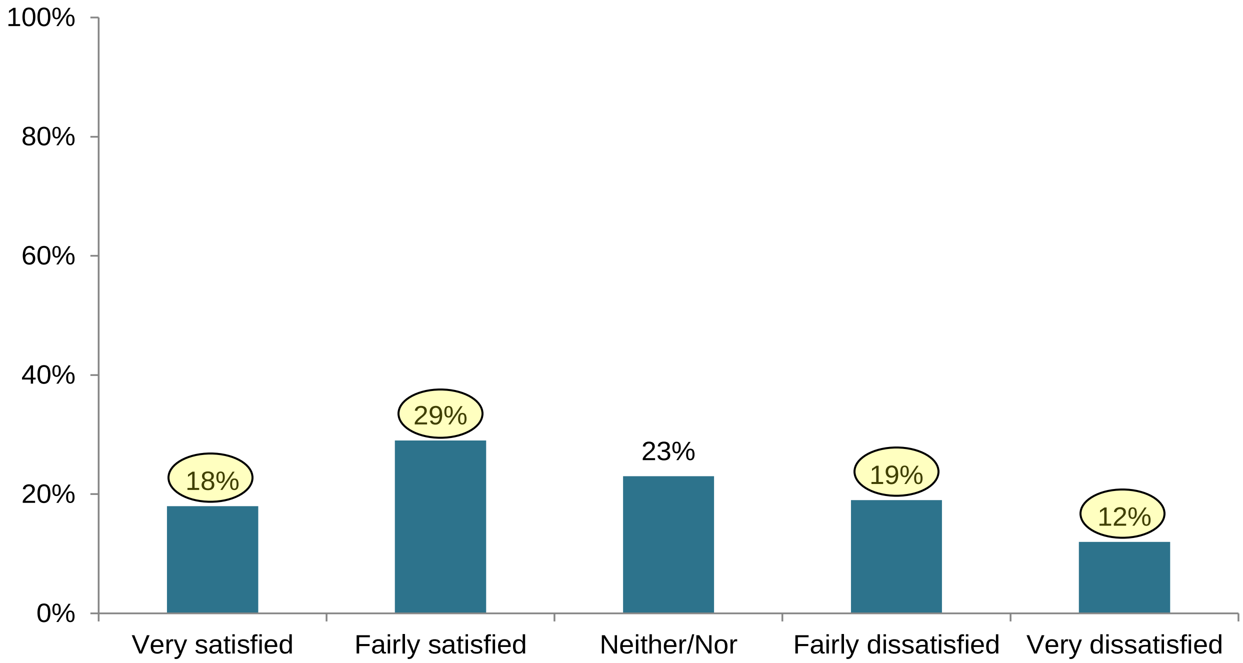
	Main form of transport %	Other forms of transport %
Car – own/friends/firms	38	3
Car – hired	29	1
Regular bus/coach	10	7
Taxi	9	5
Walked	7	21
Bicycle	2	1
Ferry/public boat	1	9
Organised coach tour	1	1
Motorbike	1	-
Plane	*	2
Hitch-hiked	*	2
Motorhome	*	*
Private boat (owned/hired)	-	1
None	*	53

9.4 Satisfaction with Transport

9.4.1 Cost of travel to Shetland

Just under half of respondents were very or fairly satisfied with the cost of travel to Shetland whilst almost a third were dissatisfied (fairly or very).

Chart 9.2: Satisfaction with the cost of travel to Shetland
Base: online respondents who rated cost of travel to Shetland (308)



Viewed by type of visit it is clear that VFR and business respondents were markedly less satisfied than holiday respondents with the cost of travel to Shetland. Half of VFR (51%) and two-fifths of business respondents (43%) expressed dissatisfaction compared with a fifth of holiday respondents (19%).

Table 9.6: Satisfaction with the cost of travel to Shetland - total and by type of visit
Base: online responses who rated cost of travel to Shetland (308)

	Total %	Holiday %	VFR %	Business %
Very satisfied	18	21	10	14
Fairly satisfied	29	37	14	21
Neither/Nor	23	23	24	22
Fairly dissatisfied	19	12	37	19
Very dissatisfied	12	7	14	24
Mean score (out of 5)	3.21	3.53	2.69	2.81

The main reason for dissatisfaction with the costs of travel to Shetland was the price of flights, particularly compared with the costs of flying to Europe.

"Flying is too expensive for those not being paid through oil companies."

"Flights are way too expensive, especially compared to the rest of UK/Europe."

"Flying to Shetland from Edinburgh is almost as expensive as flying to Turkey from Newcastle."

Respondents commented on the expense of travelling by ferry, although others felt that ferry prices were 'reasonable', particularly compared with the costs of flights.

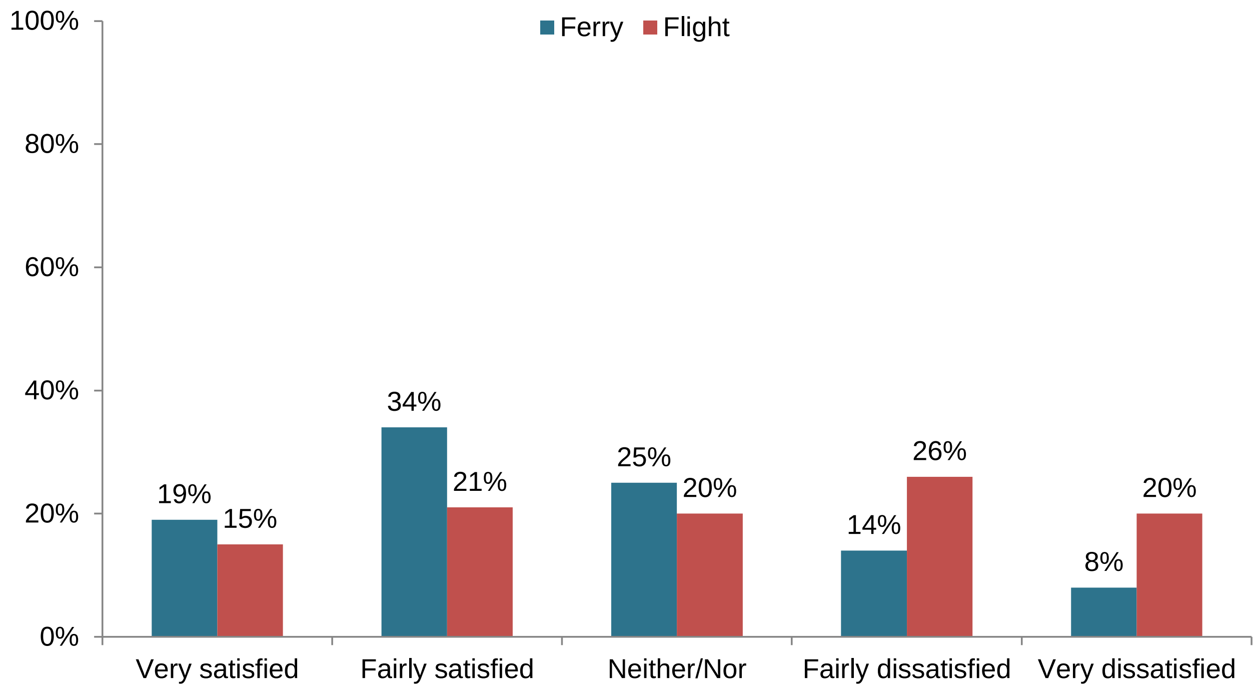
"It was nearly £600 for my car, cabin and passenger cost (me), no meals included in that either – shocking."

"The ferries are reasonably priced considering the length of the voyage, but air travel from the islands is expensive."

9.4.2 Cost of travel to Shetland – ferry vs flight

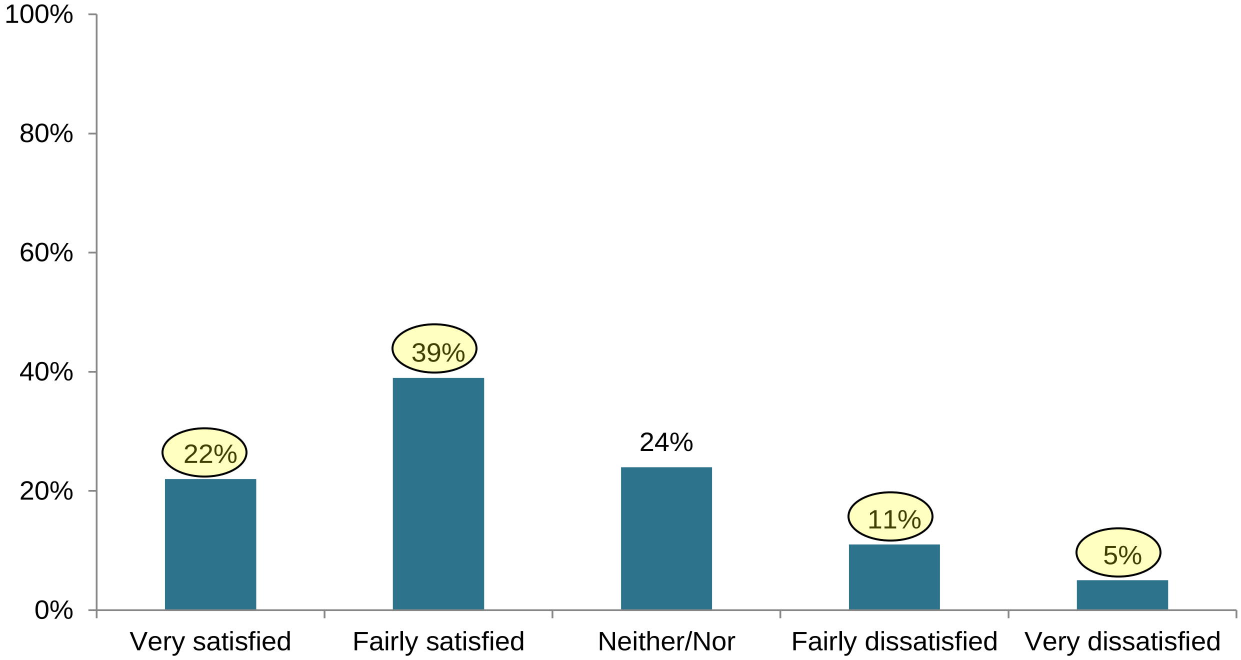
A comparison of ferry and flight highlights that ferry passengers displayed higher levels of satisfaction than flight passengers with the cost of getting to Shetland, with just over half of ferry passengers very or quite satisfied compared to under two-fifths flight passengers (36%). The results are further emphasised by an overall mean score of 3.42 (out of 5) for ferry passengers satisfaction compared with 2.85 for flight passengers.

Chart 9.3: Satisfaction with the cost of travel to Shetland – ferry vs flight
Base: online respondents who rated cost of travel to Shetland (308)



9.4.3 Cost of travel in Shetland
Just over three-fifths of respondents were satisfied with the cost of travel in Shetland, with a fifth (22%) very satisfied. 16% of respondents displayed some dissatisfaction.

Chart 9.4: Satisfaction with cost of travel in Shetland
Base: online respondents who rated cost of travel in Shetland (287)



Over two-thirds of holiday respondents were very or fairly satisfied with the cost of travel in Shetland compared with around half of VFR (55%) and business (50%). Around a quarter of VFR and business respondents expressed dissatisfaction (23% and 27%).

Table 9.7: Satisfaction with cost of travel in Shetland - total and by type of visit
Base: online respondents who rated cost of travel in Shetland (287)

	Total %	Holiday %	VFR %	Business %
Very satisfied	22	29	15	15
Fairly satisfied	39	39	40	35
Neither/Nor	24	24	23	24
Fairly dissatisfied	11	6	19	18
Very dissatisfied	5	2	4	9
Mean score (out of 5)	3.62	3.86	3.42	3.27

The main reasons for dissatisfaction with the cost of travel in Shetland were the costs of ferries and car hire.

"Ferry was expensive for trips that only lasted 10 minutes e.g. Bressay £17.50."

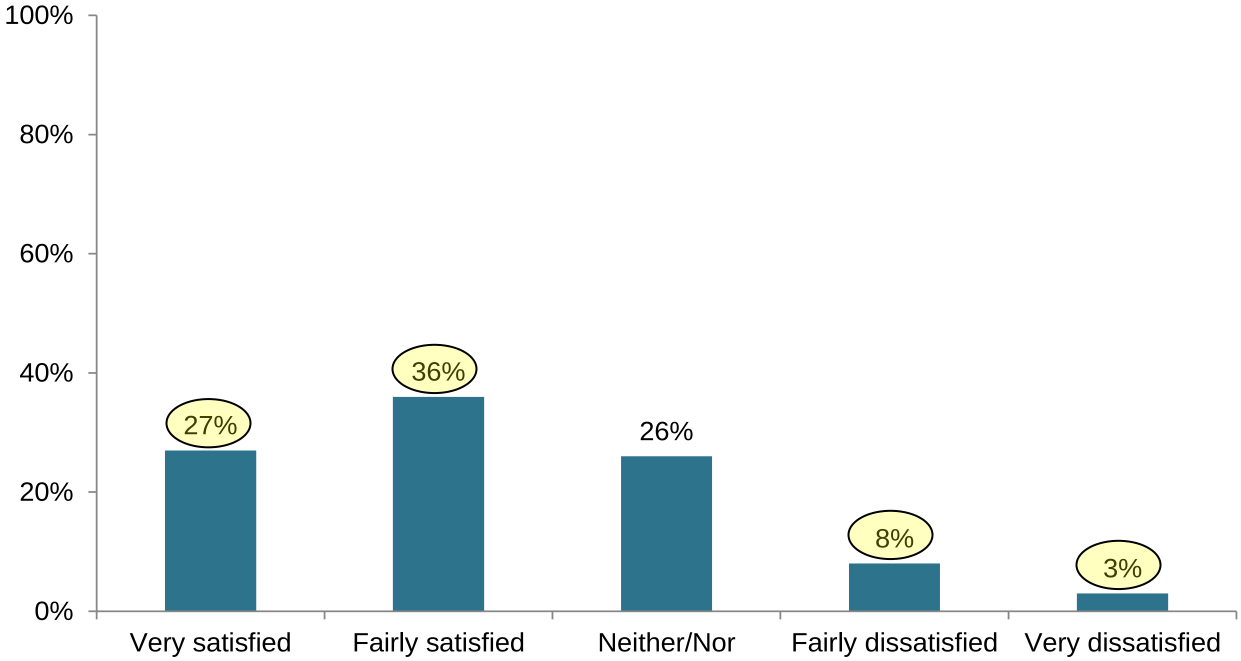
Inter-island ferries to Whalsay are expensive and difficult to book. Availability does not meet demand and the prices are high."

"Car rental was expensive... gas prices were high despite Shetland being full of fuel/oil."

9.4.4 Availability of public transport

Nearly two-thirds of respondents were very or fairly satisfied with the availability of public transport, though just over 10% displayed some dissatisfaction.

Chart 9.5: Satisfaction with availability of public transport
Base: online respondents who rated availability of public transport (190)



Two-thirds of holiday respondents were satisfied with the availability of public transport in Shetland, compared with three-fifths of VFR and business respondents. Dissatisfaction was most evident among VFR respondents, with a fifth indicating this.

Table 9.8: Satisfaction with availability of public transport - total and by type of visit
Base: online respondents who rated availability of public transport (190)

	Total %	Holiday %	VFR %	Business %
Very satisfied	27	29	30	22
Fairly satisfied	36	37	30	38
Neither/Nor	26	26	19	34
Fairly dissatisfied	8	6	16	6
Very dissatisfied	3	2	5	-
Mean score (out of 5)	3.77	3.84	3.62	3.75

Reasons for dissatisfaction with the availability of public transport were the bus service: the issues included the infrequency of scheduled buses and poor links to the airport/ferry terminals/villages.

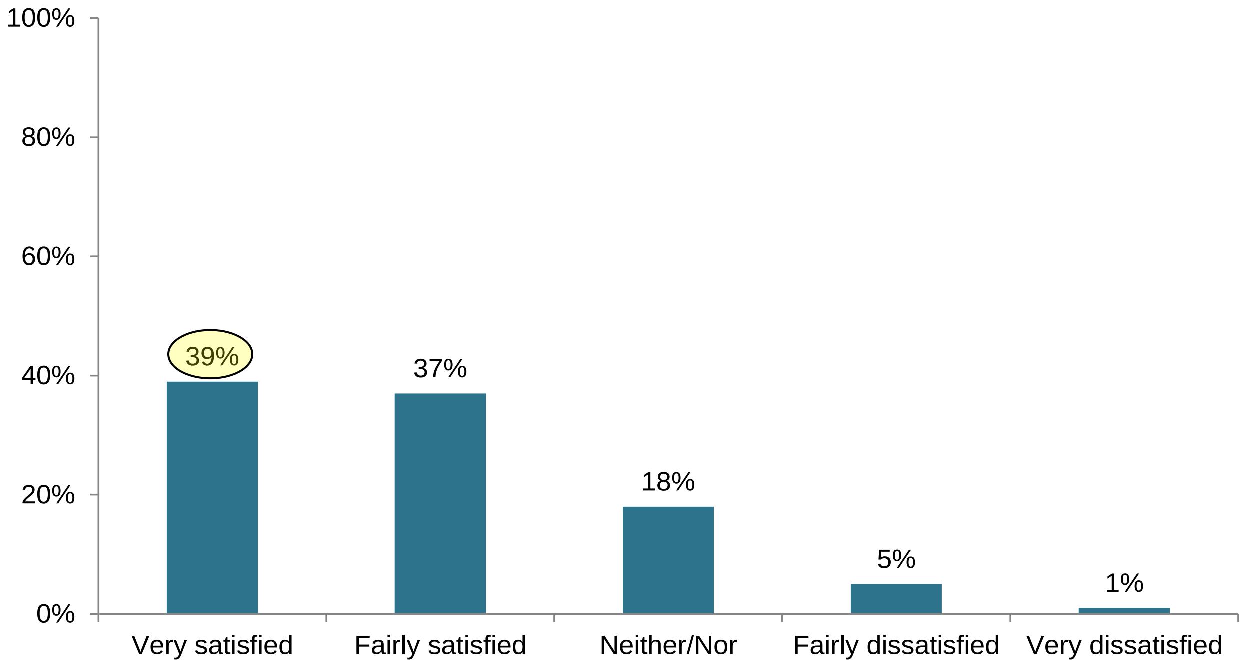
"Buses to the south end of the Mainland are not that frequent."

"Could not get a reasonable link to the airport for my flights."

9.4.5 Value for money of public transport

Three-quarters of respondents (76%) were satisfied with the value for money of public transport (which included local buses and inter-island ferries), with two in five very satisfied. There were fairly low levels of dissatisfaction.

Chart 9.6: Satisfaction with value for money of public transport
Base: online respondents who rated value for money of public transport (235)



Holiday respondents were the most satisfied with value for money of public transport in Shetland (82% compared with just over two-thirds for VFR and business). Dissatisfaction was most evident among VFR and business respondents (around a tenth of each).

Table 9.9: Satisfaction with value for money of public transport - total and by type of visit
Base: online respondents who rated value for money of public transport (235)

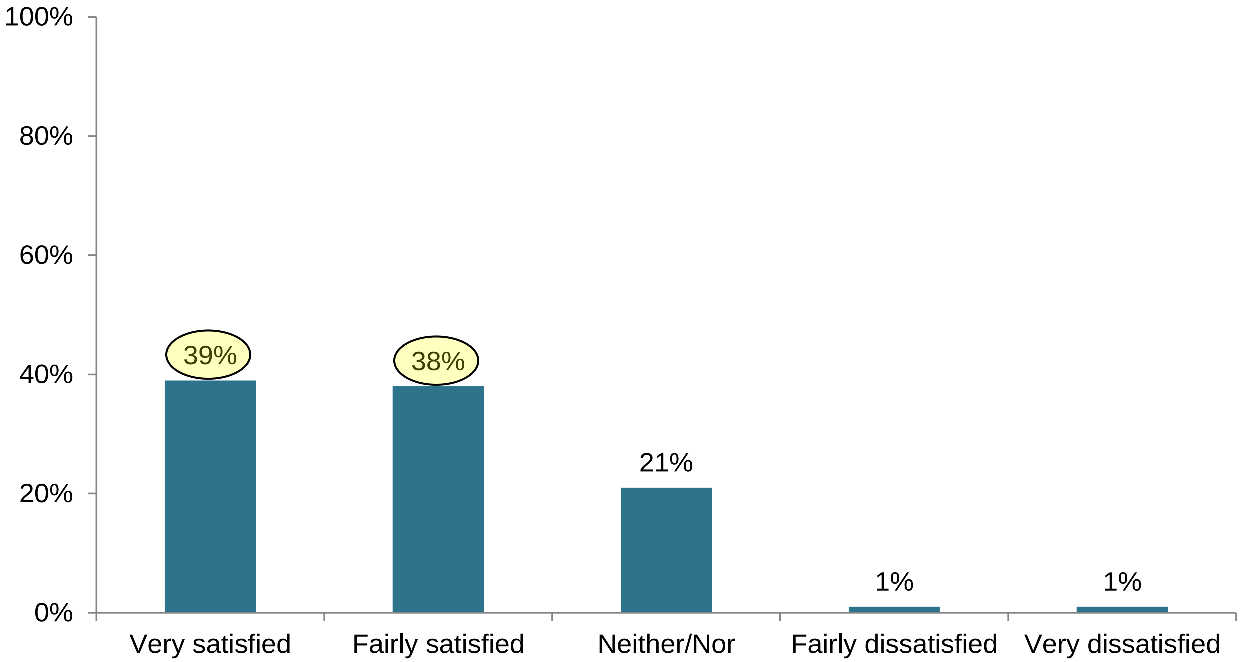
	Total %	Holiday %	VFR %	Business %
Very satisfied	39	47	33	25
Fairly satisfied	37	35	35	44
Neither/Nor	18	15	21	22
Fairly dissatisfied	5	3	12	3
Very dissatisfied	1	-	-	6
Mean score (out of 5)	4.08	4.25	3.88	3.81

There were very few comments on reasons for dissatisfaction with the value for money of public transport: the comments that specified the method of transport highlighted dissatisfaction ferries and flights.

9.4.6 Quality of public transport

Almost four-fifths of respondents were very or fairly satisfied with the quality of public transport with only a small proportion of respondents showing any dissatisfaction.

Chart 9.7: Satisfaction with quality of public transport
Base: online respondents who rated quality of public transport (197)



Holiday respondents were slightly more satisfied with the quality of public transport in Shetland than other visitor types. Dissatisfaction was most evident among VFR respondents.

Table 9.10: Satisfaction with quality of public transport - total and by type of visit
Base: online respondents who rated quality of public transport (197)

	Total %	Holiday %	VFR %	Business %
Very satisfied	39	43	32	29
Fairly satisfied	38	39	41	42
Neither/Nor	21	17	19	29
Fairly dissatisfied	1	-	5	-
Very dissatisfied	1	1	3	-
Mean score (out of 5)	4.13	4.22	3.95	4.00

9.5 Transport – Island Comparisons

Main forms of transport were quite consistent across the three island locations:

- Car – own/friends/firms was most likely to be used by VFR respondents on the Outer Hebrides (83%) compared to Shetland (67%) and Orkney (66%). Similarly, holiday respondents on the Outer Hebrides (68%) were more likely to use this form of transport than holiday respondents on Orkney (42%) or Shetland (24%)
- A third of holiday respondents on Shetland had hired a car compared to 22% on Orkney and just 13% on the Outer Hebrides
- Over half of business respondents on Orkney and the Outer Hebrides had used a 'car – own/friends/firms' whilst on Shetland just 39% had done so with more hiring a car (30%), compared to the Outer Hebrides (19%) and Orkney (11%)
- Use of regular bus/coach services was much lower on the Outer Hebrides (especially amongst holiday respondents) than on Orkney and Shetland

Table 9.11: Transport during visit – Main form of transport
Base: all face-to-face respondents

	Orkney				Outer Hebrides				Shetland		
	Holiday %	VFR %	Business %		Holiday %	VFR %	Business %		Holiday %	VFR %	Business %
Car – own/friends/firms	42	66	56		68	83	51		24	67	39
Car – hired	22	17	11		13	4	19		33	18	30
Regular bus/coach	12	8	5		3	3	2		15	5	7
Taxi	1	1	16		-	*	14		5	2	15
Walked	3	1	4		2	3	4		8	6	5
Organised coach tour	9	3	-		1	*	1		3	-	1
Motorhome	5	1	*		6	3	-		1	1	-
Bicycle	2	1	1		4	1	-		5	*	*
Ferry/public boat	*	-	3		*	-	-		2	-	-
Motorbike	1	-	-		1	1	*		2	*	*
Plane	-	*	-		-	1	1		*	-	*
Hitch-hiked	*	-	-		*	-	-		1	-	-
Private boat (owned/hired)	*	-	*		*	*	-		-	-	-

A comparison with mean scores on satisfaction with transport highlights the following:

- In general, holiday respondents were most satisfied with transport with the following variations identifiable:
  - On Orkney and the Outer Hebrides, holiday respondents were most satisfied with the quality of public transport
  - On Shetland, holiday respondents were most satisfied with the value for money of public transport
- VFR and business respondents were less satisfied with transport, especially with the cost of travel to their location, and especially on Shetland

Table 9.12: Satisfaction with transport
Base: online respondents who rated transport

	Orkney				Outer Hebrides				Shetland		
	Holiday	**VFR**	**Business**		**Holiday**	**VFR**	**Business**		**Holiday**	**VFR**	**Business**
	Mean score (out of 5)				Mean score (out of 5)				Mean score (out of 5)		
Satisfaction with the cost of travel to…	3.80	3.43	3.35		4.06	3.60	3.61		3.53	2.69	2.81
Satisfaction with cost of travel in…	3.91	3.62	3.75		3.98	3.70	3.57		3.86	3.42	3.27
Satisfaction with value for money of public transport	4.06	3.75	3.93		4.10	3.95	3.67		4.25	3.88	3.81
Satisfaction with quality of public transport	4.22	4.04	3.95		4.18	3.91	3.79		4.22	3.95	4.00
Satisfaction with availability of public transport	3.89	3.84	3.89		3.89	3.84	3.89		3.84	3.62	3.75

10. ACCOMMODATION

10.1 Accommodation during Visit

10.1.1 Accommodation during visit – 2013

Respondents were asked to identify the type/s of accommodation they stayed in during their visit. Almost three-tenths of respondents stayed in hotel accommodation with 3 star hotels accounting for the majority of these stays (27%). Other common forms of accommodation were: staying with friends/family, guest house/B&B and self-catering, which combined, accounted for 51% of respondents.

- Business respondents (43%) were more likely than those on holiday (27%) to use hotel accommodation. A very small percentage of VFR respondents (4%) used hotels
- VFR respondents were much more likely to be staying with friends/relatives (75%) compared to holiday (16%) and business (4%) respondents
- Guest house/B&B and self-catering were more popular options for those on holiday compared to VFR and business
- Of note, 20% of business respondents were staying in workers' accommodation

In terms of residence, hotel usage was quite even, varying from 26% of respondents from the UK/Ireland to 34% of respondents from Europe (Scottish: 29%, rest of world: 32%). Scottish respondents were most likely to be staying with friends/family (28%) whilst respondents from Europe and the rest of the world were most likely to stay in guest house/B&Bs (25%).

Table 10.1: Accommodation during visit
Base: face-to-face respondents staying overnight (1,138)

	Total %	Holiday %	VFR %	Business %
Hotel (all)	29	27	4	43
*- Hotel (5 star/luxury)**		-	-	-
- Hotel (4 star)	*1*	2	*	2
- Hotel (3 star)	*27*	25	4	39
- Hotel (1-2 star)	*1*	*	-	2
Staying with friends/family	23	16	75	4
Guest house/B&B	16	22	8	14
Self-catering	12	19	9	7
Workers' accommodation on-site/rig	8	*	1	20
Hostel	5	11	1	3
Camping Bod	3	8	*	-
Second home	2	2	1	2
Tent at serviced campsite	1	2	-	-
Tent (non-campsite)	*	1	-	-
Motorhome at serviced campsite	*	*	*	*
Motorhome (non-campsite)	*	*	*	-
Caravan pitch - serviced campsite	*	*	-	-
Static caravan	*	-	*	-
Other	5	2	-	9

*Note: Shetland does not currently offer any 5 star/luxury hotel accommodation

Accommodation preferences were quite consistent across the research period with the exception of January-March when hotel usage dropped and other forms of accommodation slightly increased, reflecting a dip in business respondents during this period (see table 5.2).

Table 10.2: Accommodation during visit - by quarter
Base: face-to-face respondents staying overnight (1,138)

	Q1 % Oct-Dec	Q2 % Jan-Mar	Q3 % Apr-Jun	Q4 % Jul-Sep
Hotel (all)	33	23	30	29
Self-catering	8	11	11	15
Guest house/B&B	11	13	15	19
Staying with friends/family	30	33	20	20
Hostel	4	1	8	6

10.1.2 Accommodation during visit – comparison with previous visitor surveys
The type of accommodation used by visitors has not shown a significant change since 2006, although the results suggest that there may be a trend away from hotels and towards guest houses/B&Bs and self-catering.

Table 10.3: Accommodation during visit - comparison with previous visitor surveys
Base: respondents staying overnight – 2013/ all respondents – 2006/2000

	2013	2006	2000
Number of respondents	1259	1245	1724
	%	%	%
Hotel (all)	29	32	38
Staying with friends/family	23	20	23
Guest house	16*	10	12
B&B		15	13
Self-catering	12	8	7
Workers' accommodation on-site/rig	8	n/a	n/a
Hostel	5	7	5
Camping Bod	3	n/a	n/a
Second home	2	1	1
Tent at serviced campsite	1	*	3
Caravan pitch - serviced campsite	*	2	1
Motorhome	*	n/a	n/a
Tent (non-campsite)	*	1	n/a
Other	5	4	2

* this was one code in the 2013 survey

10.2 Booking Accommodation

Respondents used a variety of methods to book their accommodation.

- Over half of business respondents had someone book accommodation on their behalf (51%)
- Two-thirds of VFR respondents did not need to book, reflecting the high proportion staying with friends/family
- Holiday respondents were most likely to book by provider email, and provider telephone was also quite common amongst these respondents

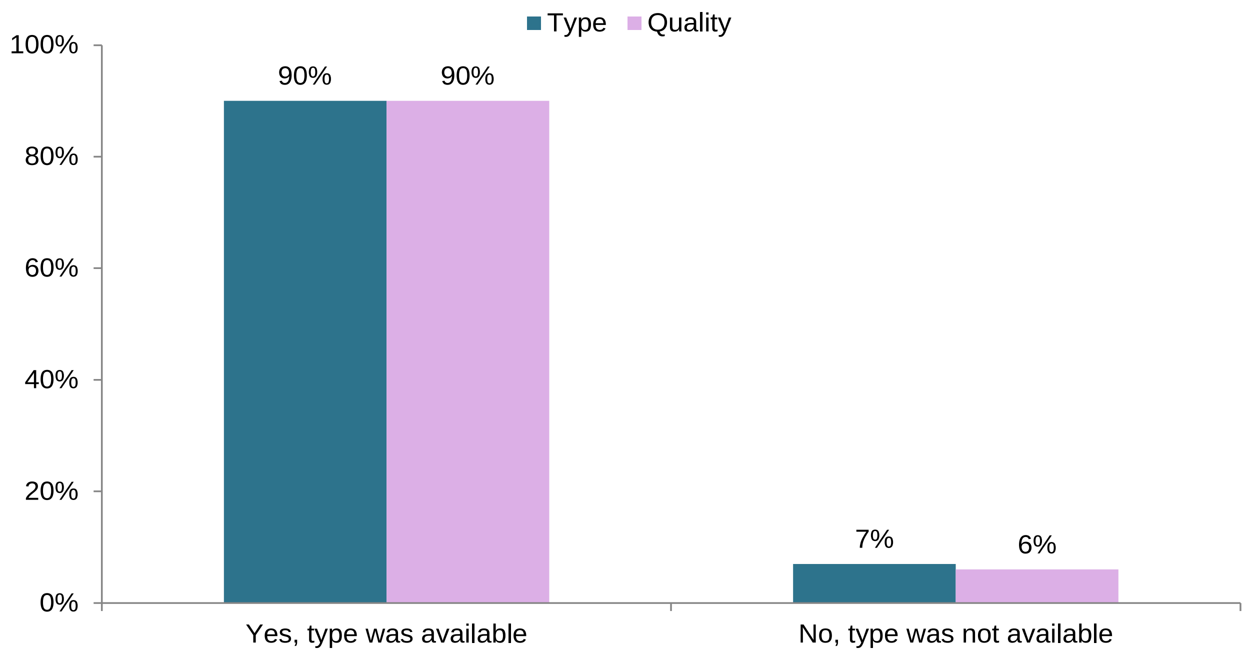
Table 10.4: Accommodation booking methods
Base: all face-to-face respondents (1,259)

	Total %	Holiday %	VFR %	Business %
Someone booked on my behalf	26	8	4	51
Did not need to book	21	17	66	4
Provider by email	10	22	5	4
Provider by telephone	9	16	7	4
Did not book in advance	4	7	2	3
Providers' website	4	6	2	2
Internet Travel Agent e.g. Expedia	2	3	-	2
visitscotland.com	1	2	*	1
Tour/travel company website	1	1	-	1
VIC\tourist board office	1	2	-	-
High Street Travel Agent	*	*	-	*
Other	11	14	6	9

10.3 Type and Quality of Accommodation

The vast majority of respondents who stayed overnight in 'paid for' accommodation felt both the type and quality of accommodation they wanted were available. Respondents on holiday or VFR were most likely to agree with the statements whilst business respondents, although still very positive, were slightly less likely to agree.

Chart 10.1: Availability of type/quality accommodation
Base: face-to-face respondents staying overnight in paid accommodation (669)



All respondents were likely to agree with the statements about the type and quality of accommodation available, suggesting the current accommodation offering appeals to a variety of visitors. Business respondents satisfaction, although also high, was lower than other respondent types.

Table 10.5: Availability of type/quality accommodation
Base: face-to-face respondents staying overnight in paid accommodation (669)

	Total %	Holiday %	VFR %	Business %
Yes, type was available	90	95	91	84
Yes, quality was available	90	95	94	84

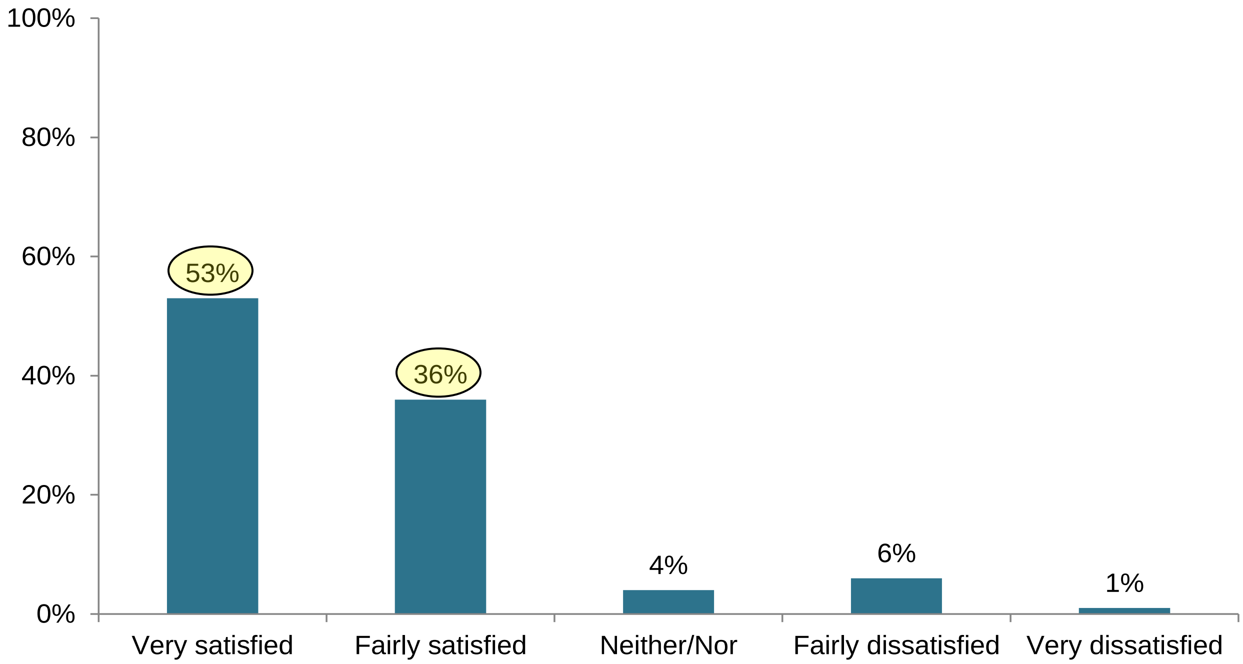
10.4 Satisfaction with Accommodation

10.4.1 Quality of accommodation

Respondents displayed high levels of satisfaction with the quality of accommodation they had experienced, with over half very satisfied and a third fairly satisfied resulting in 89% satisfaction overall (very or fairly).

By accommodation type, 73% of respondents staying in guest houses/B&Bs were very satisfied with the quality whilst for respondents in self-catering accommodation the figure was 67% and for hotel guests 33%.

Chart 10.2: Satisfaction with quality of accommodation
Base: online respondents who rated quality of accommodation (212)



The vast majority of holiday and VFR respondents were satisfied with the quality of accommodation available on Shetland. Although three-quarters of business respondents were satisfied over a fifth were dissatisfied and it is noticeable that only this group displayed significant dissatisfaction.

Table 10.6: Satisfaction with quality of accommodation - total and by type of visit
Base: online respondents who rated quality of accommodation (212)

	Total %	Holiday %	VFR %	Business %
Very satisfied	53	62	80	36
Fairly satisfied	36	34	20	38
Neither/Nor	4	3	-	5
Fairly dissatisfied	6	1	-	18
Very dissatisfied	1	-	-	4
Mean score (out of 5)	4.33	4.58	4.80	3.84

Reasons for being dissatisfied with the quality of accommodation focussed on issues with accommodation being 'shabby' and out of date.

“First room was damp and the second let in water. Generally cold."

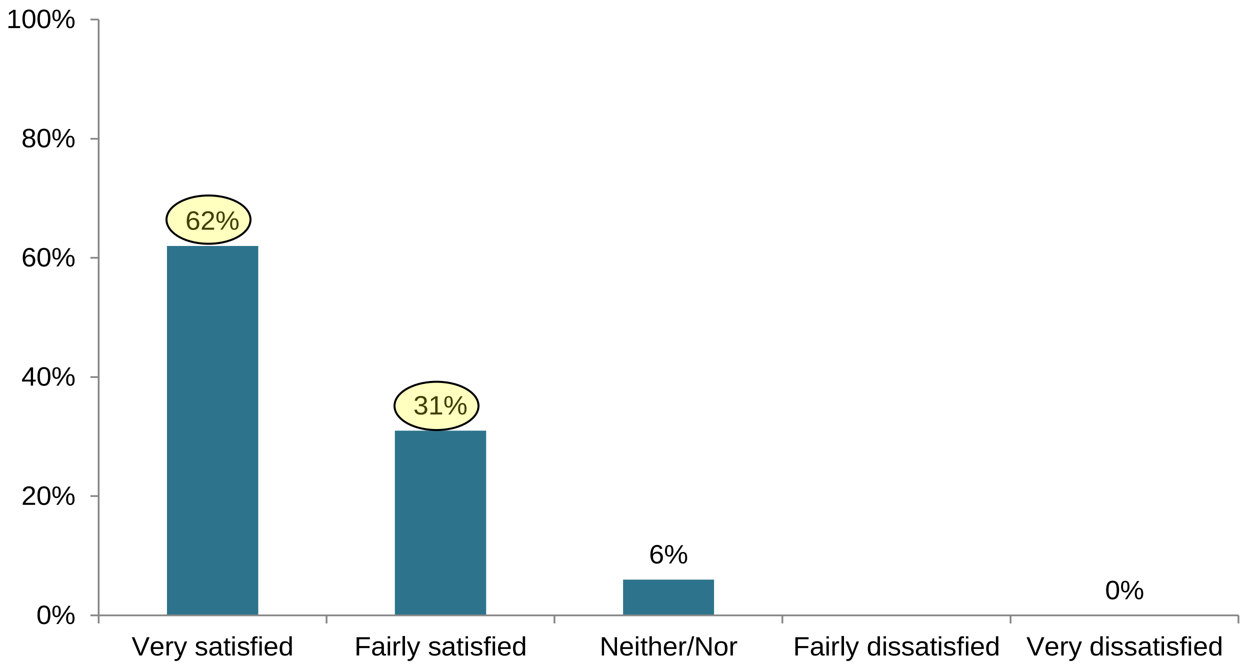
“Rooms badly in need of refurbishment.”

"The accommodation was very old fashioned, particularly for the cost involved. The rooms were very outdated."

10.4.2 Friendly and efficient service
There were very high levels of satisfaction with the friendly and efficient service that respondents had experienced in their accommodation, with three-fifths very satisfied and nearly a third fairly satisfied, resulting in 93% satisfaction overall (very or fairly).

Respondents staying in self-catering accommodation were most satisfied with the friendly and efficient service (80% very satisfied) closely followed by guest house/B&B guests (75%) whilst the comparable figure for hotel guests was only 45%.

Chart 10.3: Satisfaction with friendly and efficient service
Base: online respondents who rated friendly and efficient service (201)



All types of visitor displayed high levels of satisfaction with the friendly and efficient service with hardly any dissatisfaction shown.

Table 10.7: Satisfaction with friendly and efficient service - total and by type of visit
Base: online respondents who rated friendly and efficient service (201)

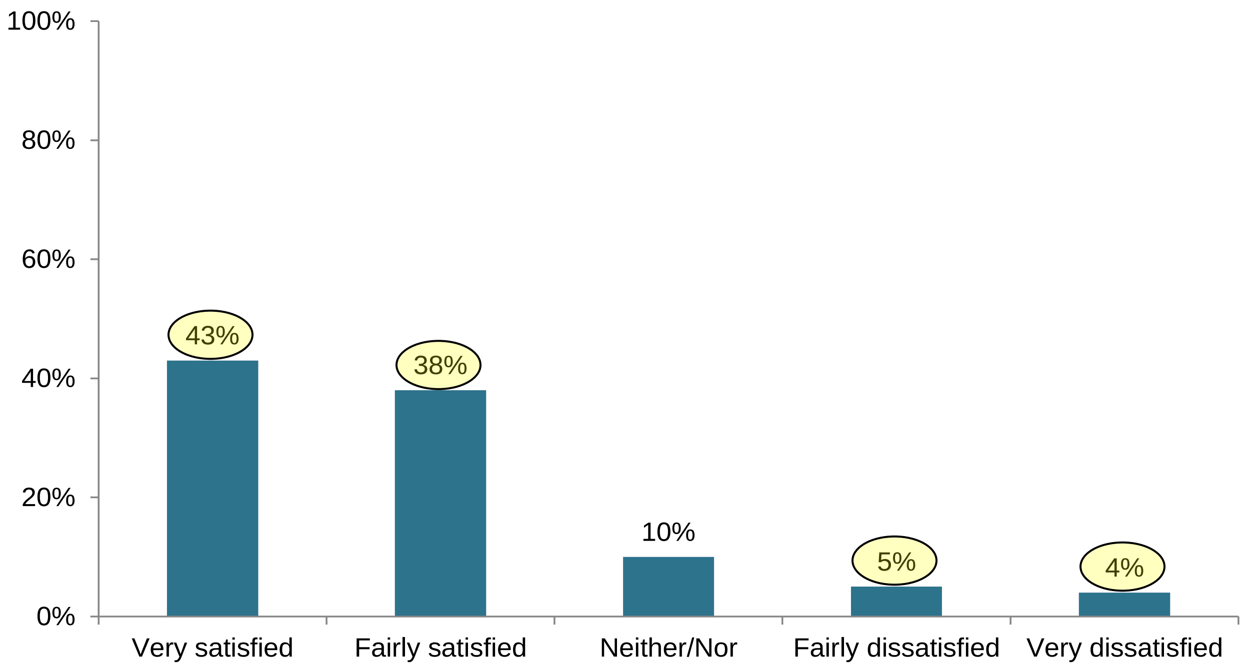
	Total %	Holiday %	VFR %	Business %
Very satisfied	62	68	80	54
Fairly satisfied	31	30	20	38
Neither/Nor	6	2	-	8
Fairly dissatisfied	-	-	-	-
Very dissatisfied	*	1	-	-
Mean score (out of 5)	4.55	4.63	4.80	4.46

10.4.3 Value for money of accommodation

Overall, 81% of respondents were very (43%) or fairly (30%) satisfied with the value for money of the accommodation they had used. Almost a tenth of respondents displayed some dissatisfaction with accommodation costs.

63% of respondents staying in self-catering accommodation were very satisfied with the value for money they had encountered compared to 53% of guest house/B&B guests and just 20% of hotel guests.

Chart 10.4: Satisfaction with value for money of accommodation
Base: online respondents who rated value for money of accommodation (198)



As with quality of accommodation (see 10.4.1) it was business respondents who were less satisfied with this element of accommodation, with 20% of business respondents showing dissatisfaction with the value for money of accommodation.

Table 10.8: Satisfaction with value for money of accommodation - total and by type of visit
Base: online respondents who rated value for money of accommodation (198)

	Total %	Holiday %	VFR %	Business %
Very satisfied	43	51	40	25
Fairly satisfied	38	39	40	38
Neither/Nor	10	7	20	17
Fairly dissatisfied	5	2	-	10
Very dissatisfied	4	1	-	10
Mean score (out of 5)	4.12	4.38	4.20	3.56

The reasons for dissatisfaction with the value for money of accommodation related to the prices being perceived as high compared with the quality of the rooms.

"Top prices charged for poor quality accommodation."

"The cost of the hotel did not match the quality provided."

10.5 Accommodation – Island Comparisons

Accommodation patterns on the three locations showed consistency:

- Business respondents were most likely to be staying in hotel accommodation with over half doing so on Orkney and the Outer Hebrides (54%) compared to 43% on Shetland
- 17% of VFR respondents on Orkney stayed in hotels, but just 6% (the Outer Hebrides) and 4% (Shetland) did so. VFR respondents were more likely to stay with friends/relatives - Shetland (75%) and the Outer Hebrides (66%) with fewer doing so on Orkney (53%)
- Usage of guest house/B&B and self-catering options were similar on each location with between a fifth and a quarter of holiday respondents using these forms of accommodation on each island

Table 10.9: Accommodation during visit
Base: face-to-face respondents staying overnight

	Orkney				Outer Hebrides				Shetland		
	Holiday %	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**
Hotel (all)	27	17	54		24	6	54		27	4	43
- Hotel (5 star/luxury)	*	*1*	-		*1*	-	-		-	-	-
- Hotel (4 star)	*4*	*3*	*2*		*7*	*1*	*9*		*2*	*	*2*
- Hotel (3 star)	*22*	*13*	*52*		*13*	*4*	*29*		*25*	*4*	*39*
- Hotel (1-2 star)	*1*	-	*		*3*	*2*	*16*		*	-	*2*
Staying with friends/family	5	53	2		6	66	3		16	75	4
Guest house/B&B	22	9	15		28	7	27		22	8	14
Self-catering	24	16	9		24	14	7		19	9	7
Hostel	10	4	5		5	-	1		11	1	3
Workers' accommodation	-	-	15		-	-	2		*	1	20
Second home	2	2	*		5	5	2		2	1	2
Tent at serviced campsite	5	2	-		8	1	-		2	-	-
Motorhome (non-campsite)	2	1	*		4	3	-		*	*	-
Tent (non-campsite)	2	1	-		4	*	-		1	-	-
Motorhome at serviced campsite	2	-	-		4	2	-		*	*	*
Camping bod	-	-	-		-	-	-		8	*	-
Caravan pitch - serviced campsite	3	-	*		1	-	-		*	-	-

Inn	-	-	-		1	-	1		-	-	-
Static caravan	-	-	-		1	-	-		-	*	-
Restaurant with rooms	-	-	-		*	-	*		-	-	-
Other	3	4	3		3	2	6		2	-	9

Booking methods varied by respondent type but the behaviour of respondents was similar in each location:

- A high proportion of VFR respondents on each location did not book as they were staying with friends/relatives
- Up to half of business respondents (Orkney and Shetland) had someone book accommodation on their behalf
- Booking via telephone was almost equally likely for holiday, VFR and business respondents on Orkney, but on the Outer Hebrides VFR respondents were much less likely to use this form of booking and on Shetland both VFR and business respondents were less likely to use it
- Holiday respondents in Shetland were much less likely to book by providers website (6%) compared to Orkney and the Outer Hebrides (both 29%). In contrast, holiday respondents on Shetland were much more likely than elsewhere (22%) to book with providers by email – Orkney (9%), the Outer Hebrides (13%)

Table 10.10: Accommodation booking methods
Base: all face-to-face respondents

	Orkney				Outer Hebrides				Shetland		
	Holiday %	VFR %	Business %		Holiday %	VFR %	Business %		Holiday %	VFR %	Business %
Did not need to book	8	50	3		16	70	5		17	66	4
Someone booked on my behalf	5	5	49		6	2	37		8	4	51
Provider by telephone	18	15	18		21	8	18		16	7	4
Providers' website	29	14	4		29	10	8		6	2	2
Provider by email	9	5	3		13	3	2		22	5	4
Did not book in advance	9	2	1		12	3	1		7	2	3
Internet Travel Agent e.g. Expedia	4	2	3		3	1	4		3	-	2
visitscotland.com	6	2	1		3	*	1		2	*	1
VIC\tourist board office	2	1	-		2	1	1		2	-	-
Tour/travel company website	1	1	2		2	*	*		1	-	1
High Street Travel Agent	1	-	1		1	-	1		*	-	*
Other	4	2	6		6	1	5		14	6	9

A comparison with mean scores on satisfaction with accommodation highlights the following:

- VFR respondents, especially on Orkney, displayed high levels of satisfaction with their accommodation
- In contrast it was business respondents on each location who showed the lowest levels of satisfaction, especially on Shetland

Table 10.11: Satisfaction with accommodation
Base: online respondents who rated accommodation

	Orkney				Outer Hebrides				Shetland		
	Holiday	**VFR**	**Business**		**Holiday**	**VFR**	**Business**		**Holiday**	**VFR**	**Business**
	Mean score (out of 5)				Mean score (out of 5)				Mean score (out of 5)		
Satisfaction with quality of accommodation	4.64	4.82	4.38		4.63	4.47	4.22		4.58	4.80	3.84
Satisfaction with friendly and efficient service	4.74	4.81	4.58		4.75	4.78	4.52		4.63	4.80	4.46
Satisfaction with value for money of accommodation	4.50	4.68	4.12		4.37	4.00	4.13		4.38	4.20	3.56

11. ATTRACTIONS AND ACTIVITIES

11.1 Attractions – Aware of and Visited

Table 11.1 displays a range of attractions and highlights whether respondents had a) awareness of them before their visit, and b) visited them on their current trip. The table divides the attractions into area and ranks them according to most-least visited. It should be noted that these results do not represent overall visitor levels to these attractions but highlight which respondents were aware of and where they visited.

In terms of awareness before visit, Scalloway Castle (49%), Shetland Museum and Archives (49%), Jarlshof (47%) and Scalloway Museum (46%) were all known to around half of respondents, and in general respondents were aware of a wide range of local attractions.

Overall, Shetland Museum and Archives (57%) was the attraction most likely to be visited by respondents with RSPB Sumburgh Head Reserve (34%), St Ninian's Isle (33%), Jarlshof (31%) and Scalloway Castle (31%) also visited by around a third respondents.

Table 11.1: Attractions aware of and visited
Base: online respondents who had visited attractions (299)

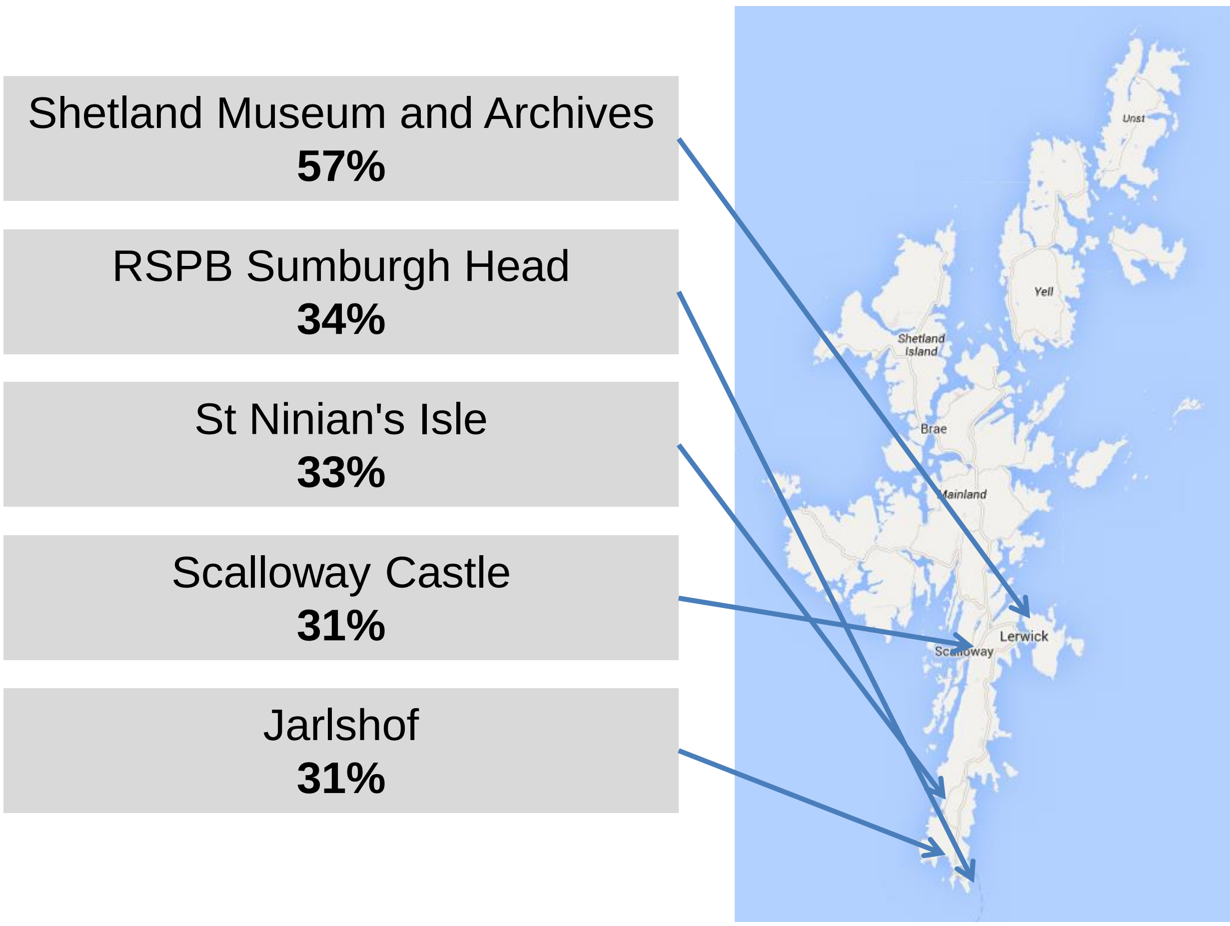
	Aware of (before visit) %	Visited %
North Isles		
Hermaness Nature Reserve and Visitor Centre	38	23
Unst Heritage Centre & Unst Boat Haven	36	16
Viking Unst	33	15
Muness Castle	25	12
Keen of Hamar	21	7
Fetlar RSPB Reserve	34	7
Old Haa	25	7
Fetlar Interpretive Centre	20	3
Hagdale Horse Mill	15	2
Northmavine, Lunnasting and Whalsay		
Eshaness	35	29
Ronas Hill	25	9
Tangwick Haa Museum	23	6
Lunna Kirk	20	6
Whalsay Heritage Centre	27	3
The Cabin Museum	14	3
Hanseatic Booth, Whalsay	14	1
Westside and Central Mainland		
Scalloway Castle	49	31
Scalloway Museum	46	25
Weisdale Mill (Bonhoga Gallery)	19	10
Stanydale Temple	14	4
Huxter Mills	9	4
Burra Heritage Centre (Easthouse)	21	3
Burland Croft Trail	11	2

Table 11.1: Attractions aware of and visited *(Continued)*
Base: online respondents who had visited attractions (299)

	Aware of (before visit) %	Visited %
Lerwick and Bressay		
Shetland Museum and Archives	49	57
Clickimin Broch	40	25
Mareel	24	25
Fort Charlotte	37	24
Noss	36	16
Shetland Textile Museum / Böd of Gremista	35	7
Galley Shed Lerwick: Up Helly Aa Exhibition	33	7
Bressay Heritage Centre	27	7
Shetland Family History Society	13	4
South Mainland and Fair Isle		
RSPB Sumburgh Head Reserve	44	34
St Ninian's Isle	44	33
Jarlshof	47	31
Mousa Broch	50	16
Old Scatness Broch and Iron Age Village	33	10
Croft House Museum	27	10
Quendale Water Mill	27	9
Hoswick Visitor Centre	17	6
Fair Isle Bird Observatory	39	5
George Waterston Memorial Centre, Fair Isle	13	2

The five most visited attractions in Shetland were based around Lerwick, Scalloway and Sumburgh, whilst eleven (out of 42) attractions were visited by 20% or more of respondents.

Chart 11.1: Top 5 attractions visited
Base: online respondents who had visited attractions (299)



As one might expect it is holiday respondents who displayed the highest propensity to visit attractions, however, over two-thirds of business respondents had visited the Shetland Museum and Archives. In general, however, business respondents were least likely to visit attractions.

Table 11.2: Top 5 attractions visited - total and by type of visit
Base: online respondents who had visited attractions (299)

	Total %	Holiday %	VFR %	Business %
Shetland Museum and Archives	57	58	50	67
RSPB Sumburgh Head Reserve	34	42	18	14
St Ninian's Isle	33	36	31	-
Scalloway Castle	31	34	24	10
Jarlshof	31	40	10	10

11.2 Activities Undertaken

Table 11.3 displays a range of activities and highlights all the activities respondents had undertaken during their visit and also their main activity. The table is ranked by main activity.

Respondents undertook a range of activities with short walks (61%) and beaches/coastal scenery (56%) popular with more than half of respondents. Of note, 15% of respondents visited a festival or event and for nearly half of these respondents this was their main activity. The most common main activity was longer walks, undertaken by 13% of respondents, whilst general sightseeing was the main activity for 12% of respondents.

Table 11.3: Activities undertaken – All and main activities
Base: all online respondents (368)

	All activities %	Main activity %
Longer walks - over 2 miles	39	13
General sightseeing/tour	32	12
Visiting Festivals or events	15	7
Bird watching	38	6
Short walk - up to 2 miles	61	5
Beaches/coastal scenery	56	5
Photography/painting	26	5
Archaeological sites	35	4
Shopping for local crafts/products	45	3
Trying local food	39	2
Nature/wildlife sites	35	2
Visits to local leisure centres	18	2
Musical entertainment/activities	15	2
Guided tour	8	2
Cycling on a road/surfaced path	6	2
Special event - personal e.g. wedding	4	2
Viewpoints/picnic areas	34	1
Other nature watching (flora/fauna)	22	1
Geological sites	18	1
Knitting/textiles	13	1
Family history/genealogy research	4	1
Sea angling	2	1
Mountain biking	1	1
Marine wildlife watching	26	*
Other shopping	22	*
Loch fishing	2	*
Sailing	1	*
Diving	1	*
Kayaking	1	*
Other sporting activity	1	*
Golf	*	*
Listening to traditional music	16	-
Rock climbing	1	-
Water sports	-	-

As with visiting attractions, it is holiday respondents who are most likely to undertake activities, with nearly three-quarters taking short walks or visiting beaches/coasts. VFR respondents were also very engaged in these and other activities but the pattern amongst business respondents is very mixed and focused more around short walks.

Table 11.4: All activities undertaken (top 5) - total and by type of visit
Base: all online respondents (368)

	Total %	Holiday %	VFR %	Business %
Short walk - up to 2 miles	61	73	74	25
Beaches/coastal scenery	56	72	68	15
Shopping for local crafts or local products	45	56	55	20
Trying local food	39	50	39	21
Longer walks - over 2 miles	39	56	40	8

11.3 Attractions and Activities – Island Comparisons

Respondents on all three locations undertook a wide range of activities during their visits:

- On Orkney, holiday respondents were most likely to visit archaeological sites, VFR respondents were most likely to visit beaches/coastal areas and business respondents were most likely to try local food.
- On the Outer Hebrides, holiday and VFR respondents were most likely to visit beaches/coastal areas whilst business respondents were most likely to take short walks
- On Shetland, all visitor types were most likely to take short walks during their visit
- Bird watching and nature/wildlife sites were more common activities for respondents on Shetland than those on Orkney or the Outer Hebrides
- Likewise, Shetland respondents were more likely to take part in musical entertainment/activities or visit festivals or events.

Table 11.5: Activities undertaken – All
Base: all online respondents

	Orkney				Outer Hebrides				Shetland		
	Holiday %	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**
Beaches/coastal scenery	73	67	15		87	73	18		72	68	15
Short walk - up to 2 miles	66	66	21		73	65	24		73	74	25
Shopping for local crafts/products	56	53	22		50	49	20		56	55	20
Trying local food	57	51	36		55	46	23		50	39	21
Longer walks - over 2 miles	40	40	7		50	39	8		56	40	8
Viewpoints/picnic areas	45	36	6		55	41	4		48	39	9
Archaeological sites	80	48	7		44	20	4		57	16	4
General sightseeing/tour	42	40	9		52	35	9		44	35	8
Bird watching	39	30	5		37	20	3		52	37	11
Nature/wildlife sites	41	25	2		39	18	4		53	32	7
Other shopping	27	35	13		22	39	8		22	34	12
Photography/painting	34	17	6		39	28	6		36	23	7
Marine wildlife watching	25	18	2		29	16	2		39	23	6
Other nature watching (flora/fauna)	27	22	3		28	15	1		32	19	4
Visits to local leisure centres	11	21	8		10	22	2		18	31	5

Table 11.5: Activities undertaken – All *(Continued)*
Base: all online respondents

	Orkney				Outer Hebrides				Shetland		
	Holiday %	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**		**Holiday %**	**VFR %**	**Business %**
Geological sites	30	20	1		18	10	1		28	8	2
Listening to traditional music	12	10	4		11	20	4		19	21	4
Musical entertainment/activities	10	11	4		5	14	2		15	29	4
Visiting Festivals or events	8	10	2		5	7	1		19	21	4
Knitting/textiles	7	4	-		12	9	1		17	15	-
Guided tour	23	9	3		2	-	1		14	3	1
Cycling on a road/surfaced path	10	4	1		12	8	3		8	5	1
Special event - e.g. wedding	3	15	-		2	7	-		1	18	-
Family history/genealogy research	6	7	2		5	12	-		4	10	-
Sea angling	2	5	1		6	9	1		2	2	2
Loch fishing	1	3	-		7	11	-		2	3	1
Golf	2	3	4		3	4	1		-	2	-
Diving	2	1	2		1	3	-		-	6	1
Other sporting activity	1	2	2		2	3	2		1	2	1
Kayaking	1	-	1		4	6	2		1	-	-
Sailing	1	5	1		1	4	-		1	-	-
Water sports	1	1	-		5	4	-		-	-	-
Mountain biking	2	-	-		3	3	-		1	2	-
Rock climbing	*	1	1		1	3	-		1	-	2

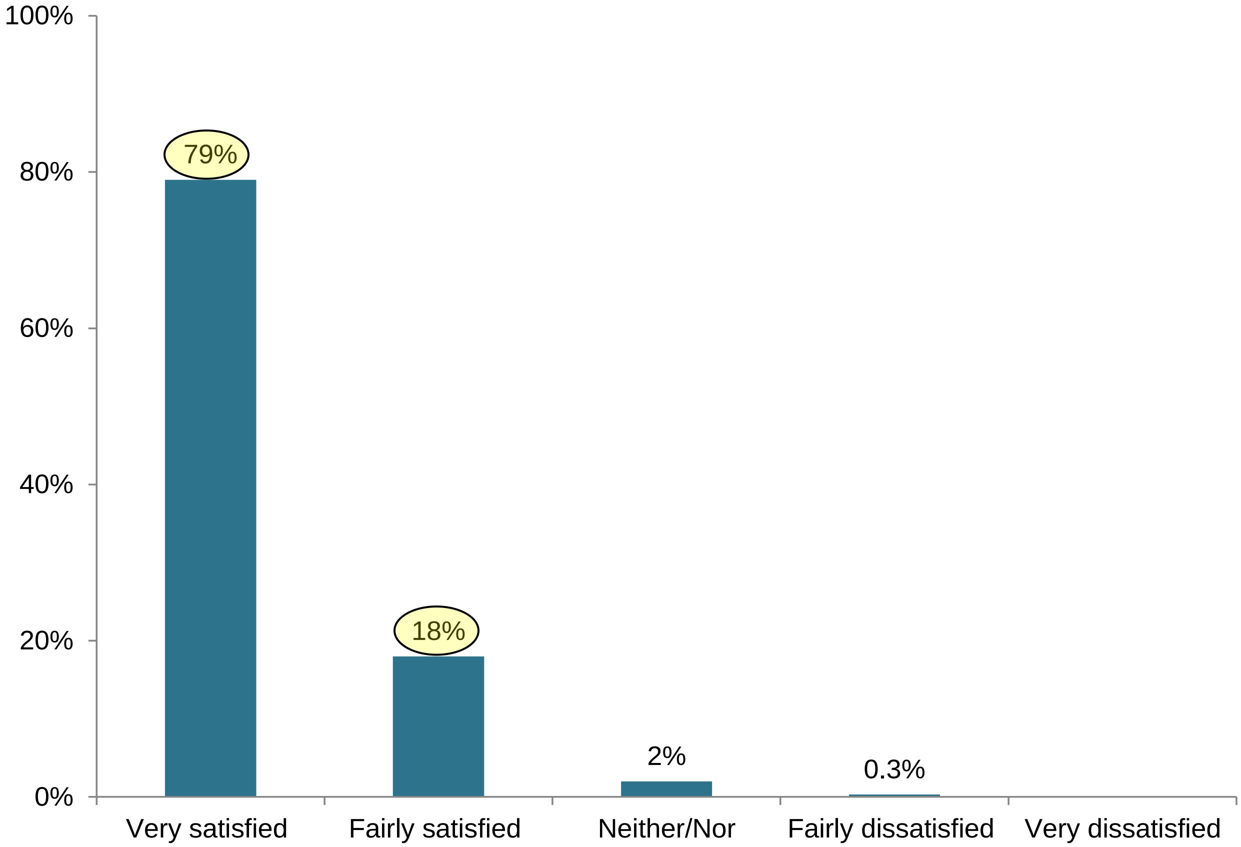
12. SATISFACTION WITH VISIT

12.1 Overall Satisfaction

Respondents' overall satisfaction with their visit was very high with 97% of respondents stating that they were satisfied and 79% very satisfied. High levels of satisfaction were displayed by respondents of all ages and residences.

Overall satisfaction levels equate to a mean score of 4.76 (out of 5).

Chart 12.1: Overall satisfaction with visit
Base: all face-to-face respondents (1,259)



Satisfaction amongst holiday and VFR respondents was particularly high (over 90% very satisfied). Most business respondents were also satisfied although fewer (64%) were very satisfied.

Table 12.1: Overall satisfaction with visit – by visitor type
Base: all face-to-face respondents (1,259)

	Total %	Holiday %	VFR %	Business %
Very satisfied	79	91	90	64
Fairly satisfied	18	8	9	32
Neither/Nor	2	1	*	4
Fairly dissatisfied	*	*	*	*
Very dissatisfied	-	-	-	-
Mean score (out of 5)	4.76	4.90	4.89	4.59

Satisfaction levels, whilst high throughout the research period, were particular positive between July-September.

Table 12.2: Overall satisfaction with visit - by quarter
Base: all face-to-face respondents (1,259)

	Q1 % Oct-Dec	Q2 % Jan-Mar	Q3 % Apr-Jun	Q4 % Jul-Sep
Very satisfied	71	83	75	83
Fairly satisfied	28	13	22	15
Neither/Nor	1	3	4	2
Fairly dissatisfied	-	1	-	1
Very dissatisfied	-	-	-	-
Mean score (out of 5)	4.71	4.79	4.71	4.80

Comments on the highlights of the visit outweighed the areas of dissatisfaction and highlighted the strengths of Shetland for the visitor market. Many respondents commented on a range of highlights:

"Amazed, really relaxing. Lovely restaurants. Friendly and welcoming people. Amazing facilities, especially for the children."

"Everything. Atmosphere. Museum. Lovely buildings. Quality of service."

The **scenery and wildlife** were the key highlights for many visitors:

“A hidden gem. Beyond my expectations. Spectacular landscapes.”

"Scenery is generally superb throughout Shetland."

"Puffins at Sumburgh Head and the scenery on the South Mainland."

"Eshaness cliffs. Muness Castle. Birds at Hermaness."

Visiting **festivals and events** was important, particularly Up Helly Aa:

"Up Helly Aa. Burning torches great and the hall at night."

"Beautiful. Lovely friendly people. Good pubs. Nice hotels."

Visitor attractions were also a key highlight:

"Jarlshoff site of great interest. Unst Saxavord a good place to visit."

"Mareel, highlight of visit. Re-visiting Sulom Voe, Sandness."

Respondents were asked if there was any aspect of their visit they were not satisfied with. The main areas of dissatisfaction were:

- the cost of visiting Shetland, including transport, food, accommodation and petrol

"Cost of air fares high and cost of food in shops and petrol is higher."

Hotels very expensive and the price of petrol high."

- lack of cafes/restaurants

"Finding eateries the centre of Lerwick at night."

"Food was a disappointment, very basic and unhealthy across the Isle, although good at B&B."

"More places to eat. Online listings including menus."

- quality of accommodation, particularly hotels

"Quality of hotels in Lerwick is poor for the price. In need of upgrading in rooms and communal areas."

Accommodation standards are too low."

- floating hotel in harbours

"Floating hotel spoils view over Lerwick Harbour and Bressay."

Floating hotels in Lerwick and Scalloway are very scruffy – shame it is in the towns."

"Gobsmacked by location of floating hotels in centre of town, first thing you see."

- lack of information

"Lack of information on bus timetables. High cost of taxi in Yell."

"Tourist information not widely available outside Lerwick, maps and charts."

12.1.1 Satisfaction – specific elements of visit

Respondents provided satisfaction ratings on a range of specific visit elements. Results, ranked by mean score in table 12.3 show high overall levels of satisfaction, particularly on the quality of visitor attractions, with over half of respondents being very satisfied with these.

Table 12.3: Satisfaction with specific elements of visit
Base: online respondents who rated specific elements of visit

	Very satisfied %	Fairly satisfied %	Neither/ Nor %	Fairly dissatisfied %	Very dissatisfied %	Mean score (Out of 5)
Quality of visitor attractions, historic sites, museums, visitor centres	55	35	9	2	*	4.42
Value for money of visitor attractions, historic sites, museums, visitor centres	47	38	14	-	-	4.33
Quality of local arts and crafts products	42	35	19	3	*	4.16
Availability of information locally about places to visit during trip	39	42	16	2	1	4.16
Signposting	36	45	16	3	1	4.12
Quality of local food and drink products	36	40	19	4	1	4.06
Opportunities to attend local events/ festivals	34	35	26	3	2	3.97
Value for money dining out	22	52	21	5	*	3.90
Value for money of local arts and crafts products	22	45	28	4	-	3.86
Availability of local produce when dining out	28	37	27	5	2	3.85

The visitor type most satisfied varied depending on the element under consideration (as indicated by the blue highlighted mean scores). Holiday respondents were most satisfied with visitor attractions and local information about places to visit, whilst VFR respondents had the highest levels of satisfaction with local elements, such as arts & crafts, food & drink, and events & festivals. Business respondents had the highest levels of satisfaction with dining out, both value for money and availability of local produce.

Table 12.4: Satisfaction with specific elements of visit - by visitor type
Base: online respondents who rated specific elements of visit

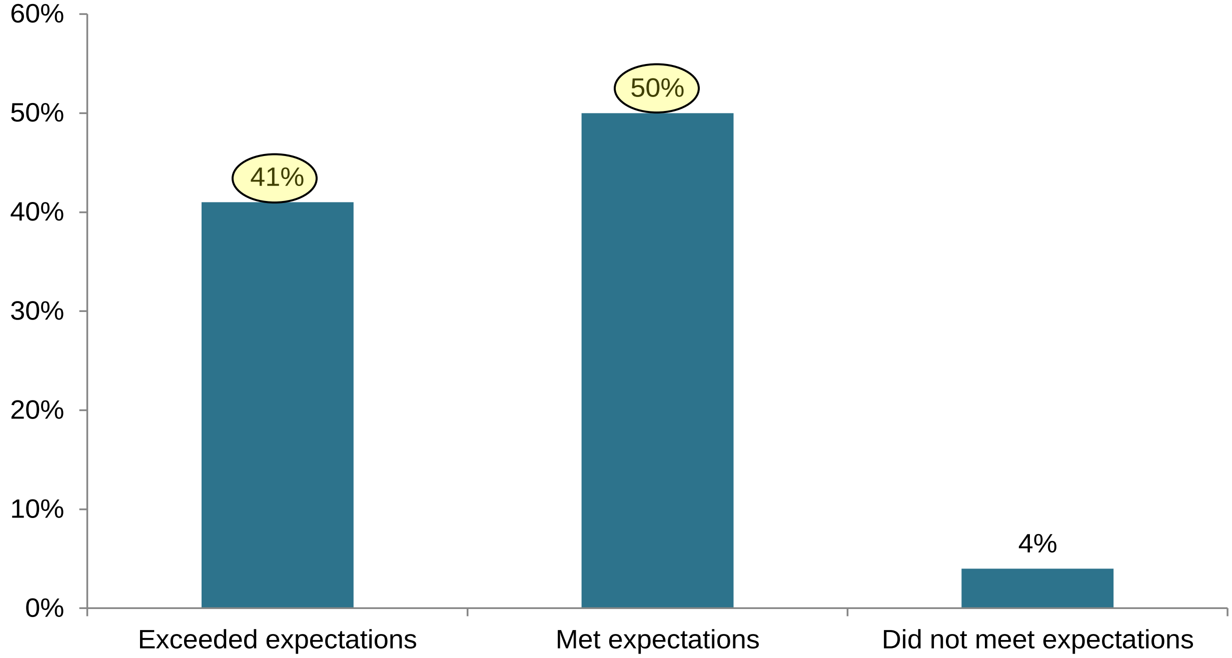
	Total Mean score (Out of 5)	**Holiday Mean score** (Out of 5)	**VFR Mean score** (Out of 5)	**Business Mean score** (Out of 5)
Quality of visitor attractions, historic sites, museums, visitor centres	4.42	4.55	4.35	4.14
Value for money of visitor attractions, historic sites, museums, visitor centres	4.33	4.44	4.27	4.03
Quality of local arts and crafts products	4.16	4.09	4.38	4.05
Availability of information locally about places to visit during trip	4.16	4.20	4.12	4.11
Signposting	4.12	4.10	4.11	4.14
Quality of local food and drink products	4.06	4.03	4.11	4.08
Opportunities to attend local events/ festivals	3.97	3.89	4.11	3.88
Value for money dining out	3.90	3.88	3.90	4.01
Value for money of local arts and crafts products	3.86	3.81	3.94	3.83
Availability of local produce when dining out	3.85	3.70	3.98	4.08

12.2 Visitor Expectations

12.2.1 Visitor Satisfaction – 2013

For over two-fifths of respondents their visit to Shetland had exceeded their expectations, whilst half felt their expectations had been met. A small percentage of respondents felt their expectations had not been met.

Chart 12.2: Extent to which expectations were met
Base: all online respondents (368)



Holiday respondents were most likely to feel that their expectations had been exceeded. VFR and business respondents were more likely to be repeat visitors therefore it should not be surprising that a higher proportion of these respondents felt their expectations had been met. In addition, feedback from business respondents suggests they have fewer expectations of their visit as they are working rather than on holiday.

Table 12.5: Extent to which expectations were met – total and by visitor type
Base: all online respondents (368)

	Total %	Holiday %	VFR %	Business %
Exceeded expectations	41	56	42	16
Met expectations	50	40	53	67
Did not meet expectations	4	2	2	6
Not sure/can't say	5	2	3	11

12.2.2 Visitor Satisfaction – comparison with previous surveys

The visit to Shetland exceeded the expectations of 41% of visitors in 2013, with no significant change since 2006. Business visitors were much less likely than in previous years to think that their expectations had been exceeded (16% in 2013 compared to 30% in 2006), whilst holiday visitors were slightly more likely to feel that their expectations had been exceeded (56% in 2013 compared to 49% in 2006).

Table 12.6: Extent to which expectations met – comparison with previous visitor surveys
Base: all respondents

	2013	2006	2000
Number of respondents	1259	1245	1724
	%	%	%
Exceeded expectations	41	42	35
Met expectations	50	55	61
Did not meet expectations	4	1	1
Not sure/can't say	5	2	3

Comments from visitors on areas for improvement highlighted the different priorities of the visitor types. The main issues identified from the comments were:

- **Holiday**
  - reduce costs – particularly flight and ferry
  - develop signposting/tourist information
  - improve availability and quality of accommodation

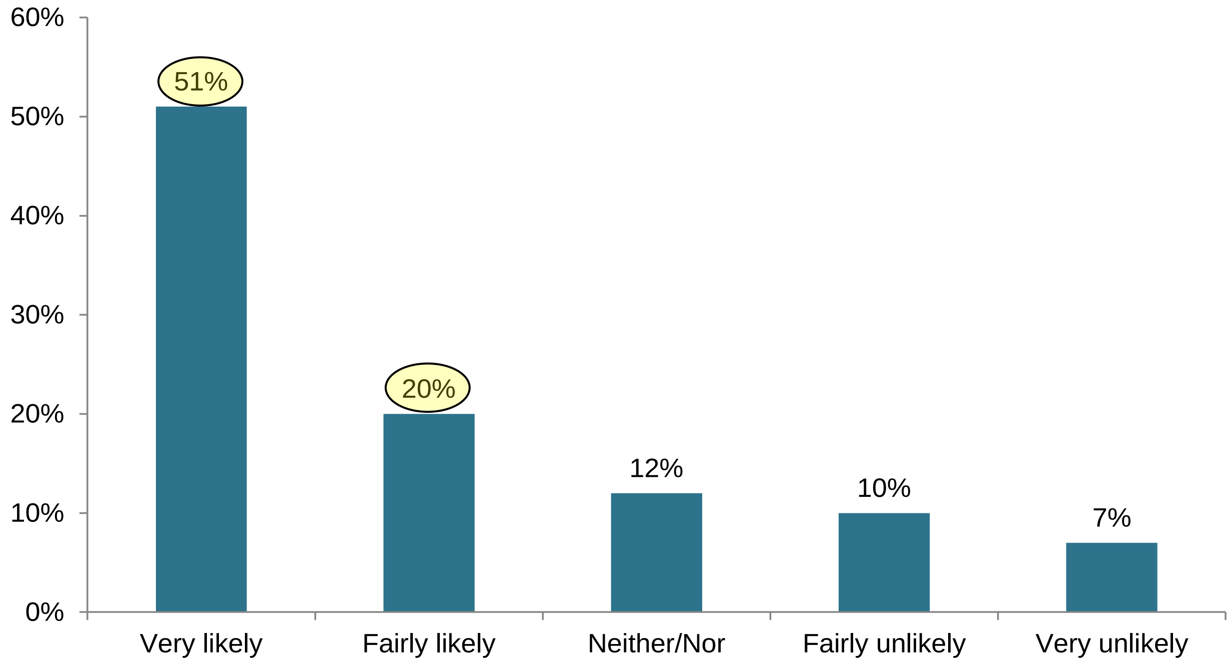
- **VFR**
  - reduce costs of travel
  - increase opening times of shops/cafes/restaurants

- **Business**
  - reduce costs of travel – particularly air
  - more scheduled flights
  - improve quality of accommodation

12.3 Likelihood of Returning

Respondents were asked how likely they would be to visit Shetland in the next five years for a leisure holiday or short break. Almost three-quarters (71%) indicated that they were likely to do so, with around half (51%) very likely to do so.

Chart 12.3: Likelihood of re-visiting within five years
Base: all online respondents (368)



VFR respondents were highly likely to visit again within five years, perhaps unsurprisingly, given that they have existing links to friends and relatives. Holiday and business respondents were almost equally likely to revisit, and in general respondents' intentions to revisit were encouragingly high.

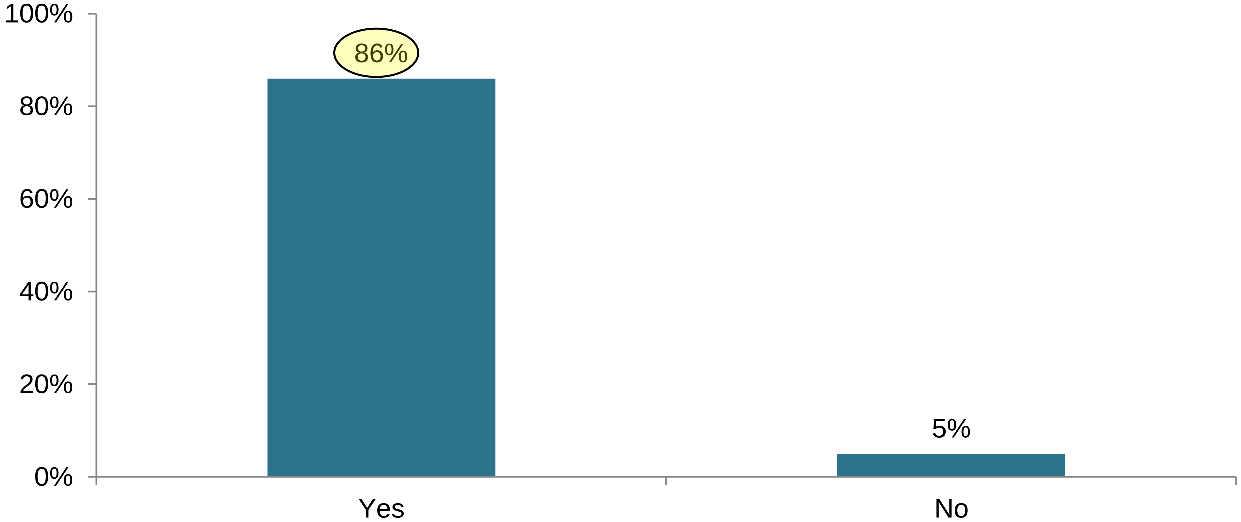
Table 12.7: Likelihood of re-visiting within five years – total and by visitor type
Base: all online respondents (368)

	Total %	Holiday %	VFR %	Business %
Very likely	51	42	77	41
Fairly likely	20	23	18	20
Neither/Nor	12	16	3	14
Fairly unlikely	10	12	2	13
Very unlikely	7	7	-	12

12.4 Likelihood of Recommending

The vast majority (86%) of respondents stated that they would be likely to recommend Shetland to others as a holiday destination.

Chart 12.4: Likelihood of recommending Shetland
Base: all online respondents (368)



All respondent types were very likely to recommend Shetland, though holiday respondents in particular seemed most likely to champion Shetland to others as a holiday destination.

Table 12.8: Likelihood of recommending Shetland – total and by visitor type
Base: all online respondents (368)

	Total %	Holiday %	VFR %	Business %
Yes	86	94	89	68
No	5	1	2	13
Don't know	8	4	6	16

12.5 Satisfaction with Visit – Island Comparisons

When compared by island and type of visit, overall satisfaction levels were very similar. On specific elements of the visit:

- On Orkney, in general, holiday and VFR respondents were likely to be most satisfied with their visit (as indicated by the blue highlighted mean scores), though business respondents were the group most satisfied with local food and drink products.
- In the Outer Hebrides, holiday respondents were most satisfied with visitor attractions, local information about places to visit and dining out, whilst VFR respondents had the highest levels of satisfaction with local elements, such as food & drink, arts & crafts, local produce and events & festivals. Business respondents had the highest levels of satisfaction with the value for money of local arts and crafts.
- On Shetland, holiday respondents were most satisfied with visitor attractions and local information about places to visit, whilst VFR respondents had the highest levels of satisfaction with local elements, such as arts & crafts, food & drink, and events & festivals. Business respondents had the highest levels of satisfaction with dining out, both value for money and availability of local produce.

Table 12.9: Overall satisfaction / Satisfaction with specific elements of visit
Base: all online respondents

	Orkney				Outer Hebrides				Shetland		
	Holiday	VFR	Business		Holiday	VFR	Business		Holiday	VFR	Business
	Mean score (out of 5)				Mean score (out of 5)				Mean score (out of 5)		
Overall satisfaction with visit	**4.90**	**4.93**	**4.72**		**4.91**	**4.89**	**4.69**		**4.90**	**4.89**	**4.59**
Quality of visitor attractions	4.71	4.58	4.38		4.33	4.10	3.96		4.55	4.35	4.14
Quality of local food/drink products	4.32	4.43	4.46		4.13	4.22	4.08		4.03	4.11	4.08
Availability of information locally about places to visit during trip	4.37	4.31	4.29		4.14	4.14	4.00		4.20	4.12	4.11
Value for money of visitor attractions	4.35	4.26	4.20		4.26	4.15	3.84		4.44	4.27	4.03
Quality of local arts/crafts products	4.28	4.40	4.18		4.07	4.25	3.92		4.09	4.38	4.05
Signposting	4.16	4.16	4.04		4.05	4.09	3.86		4.10	4.11	4.14
Availability of local produce when dining out	4.10	4.21	4.12		4.03	4.11	3.97		3.70	3.98	4.08
Value for money dining out	4.10	4.08	4.07		4.04	3.93	3.90		3.88	3.90	4.01
Value for money of local arts and crafts products	3.97	4.05	3.82		3.79	3.88	3.90		3.81	3.94	3.83
Opportunities to attend local events/ festivals	3.87	4.02	3.95		3.61	4.14	3.72		3.89	4.11	3.88

Respondents overall views on their visit showed some island variations:

- Holiday respondents were most likely to state that their expectations had been exceeded, and holiday respondents on Shetland were most likely to state this (56%), compared to Orkney (50%) and the Outer Hebrides (47%)
- A high proportion of VFR respondents indicated an intention to return, especially on the Outer Hebrides (87%), compared to Shetland (77%) and Orkney (76%). Also on the Outer Hebrides, 55% of holiday respondents stated they were very likely to return compared to 42% on Orkney and Shetland
- The vast majority of all respondents would recommend their destination to others with the exception of business respondents on Shetland, two-thirds of whom would recommend.

Table 12.10: Overall views on visit
Base: all online respondents

	Orkney				Outer Hebrides				Shetland		
	Holiday	VFR	Business		Holiday	VFR	Business		Holiday	VFR	Business
Visitor expectations											
Exceeded expectations	50	38	22		47	29	17		56	42	16
Met expectations	47	63	69		51	66	70		40	53	67
Did not meet expectations	1	-	2		1	1	2		2	2	6
Not sure/can't say	2	-	8		2	3	12		2	3	11
Likelihood of Returning											
Very likely	42	76	52		55	87	51		42	77	41
Fairly likely	24	13	28		24	7	28		23	18	20
Neither/Nor	14	1	12		11	3	12		16	3	14
Fairly unlikely	13	6	7		6	-	5		12	2	13
Very unlikely	7	4	1		4	3	4		7	-	12
Likelihood of Recommending											
Yes	98	92	91		95	92	90		94	89	68
No	*	4	2		1	2	4		1	2	13
Don't know	1	1	5		3	4	6		4	6	16

APPENDIX 1: FACE-TO-FACE EXIT SURVEY QUESTIONNAIRE

SHETLAND VISITOR SURVEY - FACE TO FACE INTERVIEWS - QUESTIONNAIRE

SECTION ONE: INTERVIEWER DETAILS

This interview has been conducted in accordance with instructions and the MRS Code of Conduct.

Interviewer name ....Signature ....

Date of interview .... Month ....

SECTION TWO: INTERVIEWER TO COMPLETE

A **Day of week of interview**

Monday	1	Friday	5
Tuesday	2	Saturday	6
Wednesday	3	Sunday	7
Thursday	4		

B **Interview location**

Sumburgh airport................................ 1
Holmsgarth (Lerwick) ferry 2

Good morning/afternoon/evening, my name is .... from the independent research agency, Scotinform Ltd. We are carrying out interviews with visitors as they leave Shetland on behalf of Shetland Islands Council, the Scottish national tourism organisation, VisitScotland, and Highlands and Island Enterprise. I'm interested in finding out about your visit to Shetland and if there is anything that could be done to improve the experience of visiting the island.

SECTION THREE: ABOUT THE RESPONDENT

3.1. **First of all, can I check that you are a visitor to Shetland, either on a holiday/leisure trip or a business trip? READ OUT LIST - ONE ANSWER ONLY**

Yes- visitor for holiday/leisure/business 1
No - in transit, not visiting Shetland........... 2 CLOSE INTERVIEW
No - live on island .... 3 CLOSE INTERVIEW

ENSURE RESPONDENT IS DEPARTING TO RELEVANT DESTINATION (SEE Q5.1)

3.2. **Did you spend the majority of your visit on a yacht?**

Yes... 1 CLOSE INTERVIEW
No 2

3.3. **On this <u>current</u> trip, have you also visited or will you visit either of these islands?**

Orkney .... 1 ASK Q3.3a
Outer Hebrides .... 2 ASK Q3.3a
No, not visited either.......................... 3 GO TO Q3.4

3.3a Did you take part in an interview when leaving (Orkney/Outer Hebrides)?

Yes... 1 CLOSE INTERVIEW
No 2

SHOW CARD A

3.4. **Which of the following best describes your current visit to Shetland?**
ONE ANSWER ONLY

Holiday - day trip	1	GO TO Q3.7
Visiting friends or relatives for leisure/holiday – day trip	2	GO TO Q3.7
Holiday/short break involving staying overnight on island (1 or more nights)	3	ASK Q3.5
Visiting friends or relatives for leisure/holiday – overnight trip (1 or more nights)..	4	ASK Q3.5
On business – day trip	5	GO TO Q3.6
On business – overnight trip………………………………………………….	6	GO TO Q3.6
Combining business and holiday..	7	GO TO Q3.6
Other..	8	GO TO Q3.8

3.5. **Was this your ...? ONE ANSWER ONLY**

Main holiday of this year........................... 1 GO TO Q3.8
A second trip or short break .... 2 GO TO Q3.8

3.6. What industry do you work in? ONE ANSWER ONLY

Government/local government	1	Transport - shipping, etc	8
Renewable energy	2	Fishing	9
Oil/gas	3	Health services	10
Retail sales/service	4	Financial services	11
Media	5	IT	12
Tourism	6	Industrial manufacturing	13
Food/drink manufacture	7	Other WRITE IN	14

____

ALL BUSINESS VISITORS GO TO Q4.1

3.7. Was this day trip to the island...? READ OUT ONE ANSWER ONLY

On a guided tour package 1
An independent day trip............................ 2

3.8. What was the main reason for choosing to visit Shetland? DO NOT PROMPT

ASK ALL

SECTION FOUR: LENGTH OF VISIT

4.1. Approximately how many times have you visited Shetland before? ONE ANSWER ONLY

This is my first visit 1
Once before.. 2
Twice 3
3-5 times.. 4
6-10 times.. 5
More than 10 times..................................... 6
Lived in Shetland... 7

4.2. On this trip, how many nights will you spend away from home in the following locations? WRITE IN NUMBER OF NIGHTS, PUT '0' IF NO NIGHTS AWAY FROM HOME

In Shetland.. ____________________
Elsewhere in Scotland......................... ____________________
In total during your trip away from home.. ____________________

SHOW CARD B

4.3. Which of the following areas of Shetland did you visit during your trip? MORE THAN ONE ANSWER POSSIBLE – CIRCLE CODE BELOW

IF ON DAY TRIP (CODE 1,2 OR 5 AT Q3.4) GO TO SECTION 5

4.4 How many nights did you spend in each area? ASK NUMBER OF NIGHTS FOR EACH AREA VISITED. IF NO NIGHTS IN AREA WRITE IN '0'

	4.3 Visit	**4.4 Number of nights**
Lerwick	1	
South Mainland	2	
Central Mainland	3	
West Mainland	4	
North Mainland	5	
Yell	6	
Unst	7	
Fetlar	8	
Fair Isle	9	
Foula	10	
Bressay	11	
Whalsay	12	
Out Skerries	13	
Papa Stour	14	
Total nights in Shetland		

CHECK WITH TOTAL AT Q4.2

SECTION FIVE: TRANSPORT

5.1. Which airport or ferry terminal did you arrive in Shetland from? ONE ANSWER ONLY. PROMPT IF NECESSARY

5.2. INTERVIEWER TO COMPLETE DESTINATION. ONE ANSWER ONLY- ASK RESPONDENT IF NECESSARY

	5.1 Arrived from	5.2 Departing to
Aberdeen - ferry	1	1
Kirkwall - ferry	2	2
Aberdeen - flight	3	3
Kirkwall - flight	4	4
Inverness - flight	5	5
Glasgow - flight	6	6
Edinburgh - flight	7	7
Bergen - flight	8	8

Q5.3 TO BE CODED IN OFFICE	
Arrived and departed by ferry	1
Arrived and departed by flight	2
Used ferry and flight	3

5.4. Did you have any issues when you booked your travel to Shetland?

Yes.......... 1 ASK Q5.5
No.......... 2 GO TO Q5.6

SHOW CARD C

5.5. Did you have any of the following issues when you booked your travel to Shetland?
MORE THAN ONE ANSWER POSSIBLE

My first choice of transport type was unavailable.......... 1
No ferries at times/days I wanted.......... 2
No flights at times/days I wanted.......... 3
The ferries I wanted were too expensive.......... 4
The flights I wanted were too expensive.......... 5
The ferries I wanted were fully booked.......... 6
The flights I wanted were fully booked.......... 7
No ferries on preferred route.......... 8
No flights on preferred route.......... 9
Other WRITE IN.......... 10

SHOW CARD D

5.6. How satisfied were you with the facilities and services at (interview location)?

Very satisfied.......... 1 GO TO Q5.8
Fairly satisfied.......... 2 GO TO Q5.8
Neither satisfied nor dissatisfied.......... 3 GO TO Q5.8
Fairly dissatisfied.......... 4 ASK Q5.7
Very dissatisfied.......... 5 ASK Q5.7

5.7. Why were you dissatisfied with the facilities or services at (interview location)? PROBE FULLY

5.8. Which of these are you travelling to next? ONE ANSWER ONLY

Home.......... 1
Another part of Scotland.......... 2
Another part of the UK (England/Wales/Northern Ireland).......... 3
Other WRITE IN.......... 4

SHOW CARD E

5.9. **What was the <u>main</u> type of transport you used during your visit to Shetland? ONE ANSWER ONLY**

5.10 **And what <u>other</u> types of transport did you use during your visit to Shetland?**
EXCLUDES TRANSPORT MENTIONED AT Q5.9. MORE THAN ONE ANSWER POSSIBLE

	5.9 Main transport – ONE ANSWER	5.10 Other forms of transport
Car – own/friends/firm	1	1
Car – hired	2	2
Motorhome	3	3
Organised coach tour	4	4
Regular bus/coach	5	5
Taxi	6	6
Motorbike	7	7
Bicycle	8	8
Plane	9	9
Ferry/public boat	10	10
Private boat (own/hired)	11	11
Hitch-hiked	12	12
Walked	13	13
None	n/a	14
Other WRITE IN	15	15

SECTION SIX: ACCOMMODATION

ASK SECTION SIX IF RESPONDENT STAYING OVERNIGHT - NOT ON DAY TRIP i.e. NOT Q3.4=1, 2 OR 5.
DAY TRIPPERS GO TO SECTION SEVEN

6.1 **What type of accommodation did you stay in during this visit to Shetland?**
PROMPT IF NECESSARY - MORE THAN ONE ANSWER POSSIBLE

Hotel (5 star/luxury)	1	ASK Q6.2
Hotel (4 star)	2	
Hotel (3 star)	3	
Hotel (1-2 star)	4	
Inn	5	
Restaurant with rooms	6	
Guest house/bed and breakfast	7	
Self-catering - rented house/cottage/chalet	8	
Hostel	9	
Camping Bod	10	
Static caravan	11	
Touring caravan pitch at serviced campsite	12	GO TO Q6.4
Tent at serviced campsite	13	
Tent (non-campsite)	14	
Motorhome at serviced campsite	15	
Motorhome (non-campsite)	16	
Staying with friends/family	17	
Second home	18	
Workers' accommodation on-site/rig	19	
Other WRITE IN	20	

6.2 **Was the type of accommodation you wanted available?**

Yes, type was available	1
No, type was not available	2
Don't know	3

6.3 **Was the quality of accommodation you wanted available?**

Yes, quality was available	1
No, quality was not available	2
Don't know	3

6.4 **How did you book your accommodation?** **MORE THAN ONE ANSWER POSSIBLE IF STAYED IN MORE THAN ONE TYPE OF ACCOMMODATION. PROMPT IF NECESSARY**

Someone booked my accommodation on my behalf........1
Did not need to book - stayed with friends/family, own property or motorhome etc........2
Accommodation provider's website........3
Accommodation provider by email........4
Accommodation provider by telephone........5
Through visitscotland.com........6
Tour operator or travel company website........7
High Street Travel Agent (e.g. Thomas Cook)........8
Visitor Information Centre\tourist board office........9
Through an Internet Travel Agent (e.g. Expedia, LastMinute.com, Opodo.co.uk, Travelocity, etc.)... 10
Other WRITE IN........11

I didn't book any accommodation in advance of arriving........12
Don't know........13

SECTION SEVEN: SATISFACTION WITH VISIT

SHOW CARD F

7.1. **Overall how satisfied were you with your visit to Shetland?**

Very satisfied........1
Fairly satisfied........2
Neither satisfied nor dissatisfied........3
Fairly dissatisfied........4
Very dissatisfied........5

7.2. **Was there any aspect of your visit that you were not satisfied with? PROBE – ASK 'ANYTHING ELSE' TWICE**

7.3. **What was the highlight of your visit to Shetland or the single thing that you enjoyed or appreciated most? PROBE FULLY**

SECTION EIGHT: EXPENDITURE

EXPLAIN TO RESPONDENT THAT THE SURVEY IS MEASURING HOW MUCH PEOPLE SPEND ON THEIR VISIT TO THE ISLAND. IN ORDER TO DO THIS YOU ARE GOING TO ASK QUESTIONS ON HOW MUCH THEY AND THEIR GROUP HAVE SPENT ON DIFFERENT ITEMS. IF THEY CANNOT PROVIDE EXACT AMOUNTS THEN AN ESTIMATE OF EXPENDITURE WOULD BE USEFUL.

8.1 **How many people, including yourself, are in your immediate group or party?**
WRITE IN NUMBER, INCLUDING RESPONDENT

SHOW CARD G

8.2 **Including yourself, how many people in your group are female in the following age groups?**

8.3 **Including yourself, how many people in your group are male in the following age groups?**

	10.3 Females	10.4 Males
Under 16		
16-24		
25-34		
35-44		
45-54		
55-64		
over 65		
Total number		

CHECK THAT TOTAL FEMALES AND TOTAL MALES EQUAL TOTAL AT Q8.1

8.4. Which of these best describes who is with you on your trip?
READ OUT LIST MORE THAN ONE ANSWER POSSIBLE

Travelling alone.................................. 1
Partner/spouse.................................... 2
With child/children.............................. 3
With parents or partner's parents............ 4
Other members of family........................ 5
Friends... 6
Organised group/tour............................ 7
Business/work colleagues...................... 8
Someone else WRITE IN........................ 9
WRITE IN WHO ELSE ON TRIP

____

8.5. Were you on a package or inclusive holiday? (i.e. a holiday where your transport and accommodation were booked through a tour operator. This includes day trip packages)

Yes.. 1 SEE INSTRUCTION BELOW
No 2

IF ON PACKAGE HOLIDAY WRITE TOTAL AMOUNT OF PACKAGE IN FIRST BOX AT Q8.6 AND COMPLETE OTHER CATEGORIES ONLY IF EXPENDITURE IS NOT INCLUDED IN THE PACKAGE

SHOW CARD H

8.6. How much did you and your immediate party/group spend on the following items in total during your trip? PUT EXACT AMOUNT STATED IN £. IF THEY CANNOT STATE EXACT AMOUNT, AN ESTIMATE WILL DO.

	£ spend
Price of package/inclusive holiday	
Travel to and from the mainland/departure point	
Travel costs on the island (fuel, hire charges, public transport, etc.)	
Accommodation including any food and drink at premises	
Food and drink bought elsewhere (prepared by yourself or in cafe/restaurant)	
Entertainment and Recreation including admission fees to attractions, tours, trips and other activities	
Shopping for gifts souvenirs, crafts, etc.	
Shopping not included above	
Miscellaneous spend not included above	
Total cost of trip - TO BE COMPLETED IN OFFICE	

SHOW CARD I

8.7. Within the expenditure figures given above, how much have you and your immediate party/group spent on the following local products or produce during this trip? PUT IN NUMBERS IN £.

Local crafts such as jewellery, pottery, furniture, textiles, paintings.......................... ____________
Local food such as fish, meat, cheese, sweets, fudge, ice cream, oatcakes................ ____________
Local beverages/drinks such as whisky, wine, beer, non-alcoholic drinks................. ____________
Total amount spent on local products/produce - TO BE COMPLETED IN OFFICE ____________

SECTION NINE: DEMOGRAPHICS - RESPONDENT

EXPLAIN THAT THE FINAL QUESTIONS ASKS FOR DETAILS OF THE RESPONDENT IN ORDER TO CLASSIFY THE RESULTS. THIS INFORMATION IS ENTIRELY CONFIDENTIAL AND WILL ONLY BE USED FOR THE PURPOSES OF ANALYSING THE RESULTS OF THE SURVEY.

9.1. Gender of respondent

Male 1
Female... 2

9.2. Where do you normally live? ONE ANSWER ONLY

Scotland	1	ASK Q9.3
England	2	ASK Q 9.4
Wales	3	GO TO Q9.5
Northern Ireland	4	
Other UK e.g. Isle of Man	5	
Republic of Ireland	6	
Norway	7	
France	8	
Germany	9	
Italy	10	
Spain	11	
Netherlands	12	
Other Europe WRITE IN	13	
USA	14	
Canada	15	
Australia	16	
New Zealand	17	
Other country WRITE IN	18	

9.3. Which local authority area of Scotland do you live in? ONE ANSWER ONLY

Aberdeen City	1	Highland	17
Aberdeenshire	2	Inverclyde	18
Angus	3	Midlothian	19
Argyll & Bute	4	Moray	20
Clackmannanshire	5	North Ayrshire	21
Dumfries & Galloway	6	North Lanarkshire	22
Dundee City	7	Orkney Islands	23
East Ayrshire	8	Perth & Kinross	24
East Dunbartonshire	9	Renfrewshire	25
East Lothian	10	Scottish Borders	26
East Renfrewshire	11	Shetland Islands – not applicable	27
Edinburgh, City of	12	South Ayrshire	28
Eilean Siar	13	South Lanarkshire	29
Falkirk	14	Stirling	30
Fife	15	West Dunbartonshire	31
Glasgow City	16	West Lothian	32

SHOW CARD J

9.4. Which area of England do you live in? ONE ANSWER ONLY

Greater London	1
South East	2
South West	3
East Midlands	4
West Midlands	5
East Anglia/East of England	6
Yorkshire/Humberside	7
North East	8
North West	9

SHOW CARD K

9.5. Which of the following age groups are you in? ONE ANSWER ONLY

16-24	1
25-34	2
35-44	3
45-54	4
55-64	5
Over 65	6

SHOW CARD L

9.6. Which of these best describes the occupation of the main income earner in your household? ONE ANSWER ONLY

	High managerial, administrative or professional - e.g. doctor, lawyer, company director (50+ people), judge, surgeon, school headteacher, ...	1	GO TO SECTION TEN
	Intermediate managerial, administrative or professional - e.g. school teacher, office manager, junior doctor, bank manager, police inspector, accountant	2	
	Supervisor; clerical; junior managerial, administrative or professional - e.g. policeman, nurse, secretary, clerk, self-employed (5+ people) etc.	3	
	Skilled manual worker - e.g. mechanic, plumber, electrician, lorry driver, train driver	4	
	Semi-skilled or unskilled manual worker - e.g. baggage handler, waiter, factory worker, receptionist, labourer, gardener	5	
	Housewife / homemaker	6	
	Unemployed	7	
	Student........	8	
	Retired	9	ASK Q9.7

9.7. You say that the main income earner in the household is now retired. Which of the following best describes their occupation before they retired? ONE ANSWER ONLY

	High managerial, administrative or professional - e.g. doctor, lawyer, company director (50+ people), judge, surgeon, school headteacher, ...	1
	Intermediate managerial, administrative or professional - e.g. school teacher, office manager, junior doctor, bank manager, police inspector, accountant	2
	Supervisor; clerical; junior managerial, administrative or professional - e.g. policeman, nurse, secretary, clerk, self-employed (5+ people)	3
	Skilled manual worker - e.g. mechanic, plumber, electrician, lorry driver, train driver etc.	4
	Semi-skilled or unskilled manual worker - e.g. baggage handler, waiter, factory worker, receptionist, labourer, gardener	5
	Housewife / homemaker	6
	Unemployed	7
	Student........	8

SOCIO ECONOMIC CLASSIFICATION - TO BE CODED IN OFFICE

A (1)	1	C2 (4)	4
B (2)	2	D (5)	5
C1 (3 AND 8)	3	E (6 AND 7)	6

SECTION TEN: DETAILS FOR ONLINE SURVEY

Would you be interested in receiving an online survey asking about your experiences on Shetland with the chance to win an iPad? The online survey will ask you for more detailed views about your visit and your feedback will help improve the visitor experience in Shetland.
STRESS CONFIDENTIALITY OF DETAILS AND COMPLIANCE WITH DATA PROTECTION ACT

If you provide your email address I will arrange for you to be sent the online link to the questionnaire in the next few weeks - this will give you the chance to enter a prize draw for an iPad.
Email____
IF RESPONDENT DOES NOT WISH TO PROVIDE EMAIL EXPLAIN THAT WE CAN POST A QUESTIONNAIRE TO THEM IF THEY WISH TO TAKE PART IN THE SURVEY. ASK FOR FULL POSTAL ADDRESS, INCLUDING POSTCODE

____
COLLECT RESPONDENT PHONE NUMBER FOR BACK CHECKING AND CLOSE INTERVIEW

Respondent name ________________________ **Telephone**________________________
If phone not available ask for email or address: ____

THANK RESPONDENT AND HAND OUT THANK YOU CARD

APPENDIX 2: ONLINE SURVEY QUESTIONNAIRE

TELL US ABOUT YOUR VISIT

Please complete the questionnaire by clicking the appropriate buttons and typing your respones in the boxes provided. If you would like to enter the free prize draw for an iPad please provide your email address at the end of the questionnaire.

The questionnaire should take approximately ten minutes to complete. Once you are finished just press 'submit'. Thanks again.

Section 1: Details of Your Visit
This section asks you to confirm details of your recent visit.

Please tick one box to show which island you were visiting when you took part in the survey.

- Orkney
- The Outer Hebrides
- Shetland

NOTE: The Outer Hebrides includes Lewis, Harris, Berneray, North Uist, Benbecula, South Uist, Eriskay and Barra & Vatersay

What month was your visit to {Q1.1}? If it covered more than one month, please tick the month you spent most days in {Q1.1}.

January	July
February	August
March	September
April	October
May	November
June	December

Which of the following best describes your recent visit to {Q1.1}

- Holiday - day trip
- Visiting friends or relatives for leisure/holiday - day trip
- Holiday/short break involving staying overnight on island
- Visiting friends or relatives for leisure/holiday - overnight trip
- On business - day trip
- On business staying overnight on island
- Combining business and holiday
- Other

Other, please specify

Section 2: Planning Your Visit

Did you consider visiting either of the following islands rather than going to {Q1.1}?

- The Outer Hebrides
- Shetland
- No did not consider visiting these other islands

Section 2: Planning Your Visit

Did you consider visiting either of the following islands rather than going to {Q1.1} on your most recent trip?

- Orkney
- Shetland
- No did not consider visiting these other islands

Section 2: Planning Your Visit

Did you consider visiting either of the following islands rather than going to {Q1.1} on your most recent trip?

- Orkney
- The Outer Hebrides
- No did not consider visiting these other islands

Why did you choose {Q1.1} rather than the other island/s?

Which of the following, if any, influenced your decision to visit {Q1.1}

- Experience of previous visit/know area
- Recommendation from friend/relative
- Newspaper or magazine article
- Newspaper or magazine advertisement
- Radio or TV programme about {Q1.1}
- Radio/TV advertisement about {Q1.1}
- Tourist Brochure
- Internet/website
- Social media (Facebook/Twitter)
- Guide books
- Family connections with the area
- A film/movie or book featuring the area
- Interest in the archaeology/history
- Interest in scenery/landscape
- Specific activities such as walking or golf
- Particular events/festivals
- Interest in particular attractions
- To undertake particular activities
- To stay in particular accommodation
- Other reason
- None of these
- Don't know/can't remember

Please specify the event/festival you were most interested in

Please specify the attraction you were most interested in

Please specify the activity you were most interested in

Please specify the accommodation you most wanted to stay in

Please specify the other reason that influenced your decision to visit

Which of the following, if any, influenced your decision to visit {Q1.1}?

- Experience of previous visit/know area
- Recommendation from friend/relative
- Newspaper or magazine article
- Newspaper or magazine advertisement
- Radio or TV programme about {Q1.1}
- Radio/TV advertisement about {Q1.1}
- Tourist Brochure
- Internet/website
- Social media (Facebook/Twitter)
- Guide books
- Family connections with the area
- A film/movie or book featuring the area
- Interest in the archaeology/history
- Interest in scenery/landscape
- Specific activities such as walking or golf
- A particular event/festival
- Interest in particular attraction
- To undertake a particular activity
- To stay in particular accommodation
- Interest in geology (Geopark Shetland)
- Shetland webcams
- Promote Shetland direct mail/email
- Other reason
- None of these
- Don't know/can't remember

Please specify the attraction you were interested in

Please specify the activity you were interested in

Please specify the accommodation you wanted to stay in

Please specify the other reason that influenced your decision to visit

Was your first visit to {Q1.1} a

- visit by cruise ship
- day visit by coach tour
- None of the above

How far in advance did you start <u>planning</u> your recent trip? i.e how much time was there between you starting to plan and actually visiting?

- Less than 2 weeks
- 2 weeks up to 4 weeks
- 1 to 2 months
- 3 to 6 months
- Over 6 months to 1 year
- Over 1 to 2 years
- Over 2 years
- Not sure/don't know

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

- Didn't book in advance
- Less than 2 weeks
- 2 weeks up to 4 weeks
- 1 to 2 months
- 3 to 6 months
- Over 6 months
- Not sure/don't know

Section 3: Island Attractions

Did you visit any visitor attractions during your business trip to {Q1.1}

- Yes
- No
- Don't know

Section 3: Orkney Island Attractions

The next few questions will ask you about a range of attractions on Orkney. We're interested in understanding your awareness of these attractioons and whether you visited them on you recent trip.

Which of these visitor attractions in Kirkwall have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
St Magnus Cathedral		
Bishop's Palace and/or Earls Palace		
Orkney Museum		
Orkney Wireless Museum		
Highland Park Distillery		
Ortak Visit Centre		
Pickaquoy Centre		

Section 3: Orkney Island Attractions

Which of these visitor attractions in Stromness have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Pier Arts Centre		
Stromness Museum		
Ness Battery		

Section 3: Orkney Island Attractions

Which of these visitor attractions in East Mainland, Burray/South Ronaldsay have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Lamb Holm - Italian Chapel		
Burray - Fossil and Vintage Centre		
South Ronaldsay - Tomb of the Eagles		
South Ronaldsay - Marine Life Aquarium		
South Ronaldsay - Smithy Museum		
Sheila Fleet Visitor Centre		

Section 3: Orkney Island Attractions

Which of these visitor attractions in West Mainland have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Skara Brae		
Sandwick - Skaill House		
Stenness - Standing Stones		
Stenness - Maeshowe		
Stenness - Ring of Brodgar		
Quoyloo - Orkney Brewery Visitor Centre		
Evie - Broch of Gurness		
Brough of Birsay		
Birsay - Earl's Palace		
Birsay - Kirbuster Museum		
Harray - Corrigal Museum		
Marwick Head		

Section 3: The Outer Hebrides Island Attractions

The next few questions will ask you about a range of attractions on the Outer Hebrides. We're interested in understanding your awareness of these attractioons and whether you visited them on you recent trip.

Which of these visitor attractions on Lewis have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
An Lanntair		
Arnol Blackhouse		
Bosta Iron Age House		
Butt of Lewis		
Callanish Stones		
Carloway Broch		
Dun Eisdean		
Gearrannan Blackhouse Village		
Lews Castle & Gounds		
Loch Stiapabhat Nature Reserve		
Norse Mill and Kiln		
Museum nan Eilean		
Ravenspoint Centre		
Shawbost Museum		
Stornoway Golf Course		
Woodlands Centre		

Section 3: The Outer Hebrides Island Attractions

Which of these visitor attractions on Harris have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Bunavoneader Whaling Station		
Clisham		
Luskentyre Harris Tweed		
Luskentyre/Seilebost beach		
Seallam Visitor Centre		
St Clements Church		
Teampall at Northton		

Section 3: The Outer Hebrides Island Attractions

Which of these visitor attractions on North Uist and Berneray have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Balranald Nature Reserve		
Barpa Langass		
Claddach Kirkibost Centre		
Eilean Domhnuill, Loch Olabhat		
Langass Woodland		
Pobull Fionn		
Scolpaig Tower		
St Kilda Viewpoint		
Taigh Chearsabhagh		
Teampull na Trianaid		
Udal		
Aird ma-Rhuibhe		
Nurses Cottage		

Section 3: The Outer Hebrides Island Attractions

Which of these visitor attractions on Benbecula have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Baille nan Cailleach		
Benbecula Golf Course		
Bonnie Prince Charlie Track		
Borve Castle		
Cula Bay		

Section 3: The Outer Hebrides Island Attractions

Which of these visitor attractions on South Uist and Eriskay have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Askernish / Tom Morris Golf Course		
Cille Pheadair		
Cladh Hallan		
Flore MacDonald Monument		
Howmore Village and Ancient Chapel		
Kildonan Museum		
Loch Druidibeag Nature Reserve		
Ormiclate Castle		
Our Lady of the Isles		
Polochar Stone		
Am Politician		
Eriskay Ponies		
Prince Charlie Beach		

Section 3: The Outer Hebrides Island Attractions

Which of these visitor attractions on Barra and Vatersay have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Airport Beach		
Allathasdal		
Allt Easdal		
Barra Golf Course		
Catalina Plane Site, Vatersay		
Cille Bharra		
Compton Mackenzie's House and Grave		
Herring Walk		
Kisimul Castle		
Virgin and Child Statue, Heaval		

Section 3: Shetland Island Attractions

The next few questions will ask you about a range of attractions on Shetland. We're interested in understanding your awareness of these attractioons and whether you visited them on you recent trip.

Which of these visitor attractions on the North Isles have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Hermaness Nature Reserve and Visitor Centre		
Unst Heritage Centre & Unst Boat Haven		
Viking Unst		
Keen of Hamar		
Hagdale Horse Mill		
Muness Castle		
Fetlar Interpretive Centre		
Fetlar RSPB Reserve		
Old Haa		

Section 3: Shetland Island Attractions

Which of these visitor attractions in Northmavine, Lunnasting and Whalsay have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Ronas Hill		
Eshaness		
Tangwick Haa Museum		
Lunna Kirk		
Whalsay Heritage Centre		
Hanseatic Booth, Whalsay		
The Cabin Museum		

Section 3: Shetland Island Attractions

Which of these visitor attractions in the Westside and Central Mainland have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Huxter Mills		
Stanydale Temple		
Weisdale Mill (Bonhoga Gallery)		
Scalloway Museum		
Scalloway Castle		
Burland Croft Trail		
Burra Heritage Centre (Easthouse)		

Section 3: Shetland Island Attractions

Which of these visitor attractions in Lerwick and Bressay have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Shetland Textile Museum / Böd of Gremista		
Shetland Museum and Archives		
Mareel		
Shetland Family History Society		
Fort Charlotte		
Galley Shed Lerwick: Up Helly Aa Exhibition		
Clickimin Broch		
Bressay Heritage Centre		
Noss		

Section 3: Shetland Island Attractions

Which of these visitor attractions in the South Mainland and Fair Isle have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Hoswick Visitor Centre		
Mousa Broch		
St Ninian's Isle		
Croft House Museum		
Quendale Water Mill		
Old Scatness Broch and Iron Age Village		
Jarlshof		
RSPB Sumburgh Head Reserve		
Fair Isle Bird Observatory		
George Waterson Memorial Centre, Fair Isle		

Please tick the boxes below to indicate if you took part in any of the listed activities during your recent visit to {Q1.1}.

NOTE: If you took part in none of these activities please click '<u>Next</u>' to continue.

- Visits to local leisure centres
- Loch fishing
- Sea angling
- Cycling on a road/surfaced path
- Mountain biking
- Short walk - up to 2 miles
- Longer walks - over 2 miles
- Golf
- Diving
- Saliing
- Kayaking
- Rock climbing
- Watersports
- Other sporting activity
- General sightseeing/tour
- Bird watching
- Marine wildlife watching
- Other nature watching (flora/fauna)
- Family history/genealogy research
- Photography/painting
- Knitting/textiles
- Musical entertainment/activities
- Listening to traditional music
- Guided tour
- Shopping for local crafts or local products
- Other shopping
- Trying local food
- Visiting Festivals or events
- Special event - personal e.g. wedding
- Nature/wildlife sites
- Archaeological sites
- Geological sites
- Beaches/coastal scenery
- Viewpoints/picnic areas
- Other

Please type in the watersports activity you took part in

Please type in the other sporting activities you took part in

Please type in the other activities you took part in

Of the activities you took part in during your visit to {Q1.1}which was your main activity?

- Visits to local leisure centres
- Loch fishing
- Sea angling
- Cycling on a road/surfaced path
- Mountain biking
- Short walk - up to 2 miles
- Longer walks - over 2 miles
- Golf
- Diving
- Saliing
- Kayaking
- Rock climbing
- Watersports
- Other sporting activity
- General sightseeing/tour
- Bird watching
- Marine wildlife watching
- Other nature watching (flora/fauna)
- Family history/genealogy research
- Photography/painting
- Knitting/textiles
- Musical entertainment/activities
- Listening to traditional music
- Guided tour
- Shopping for local crafts or local products
- Other shopping
- Trying local food
- Visiting Festivals or events
- Special event - personal e.g. wedding
- Nature/wildlife sites
- Archaeological sites
- Geological sites
- Beaches/coastal scenery
- Viewpoints/picnic areas
- Other

Section 4: Source of information for visit

Which of the following information sources did you use to find out about or research {Q1.1} __before__ you arrived?

- Internet/websites
- Social media (Facebook/Twitter)
- Tourist Board brochures/leaflets
- Visitor Information Centre
- Travel Agent
- Travel operators (ferries, airlines)
- Guidebooks
- Friends/relatives/advice from others
- Other information source
- None

Where was the Visitor Information Centre you used (e.g. Inverness, Glasgow)

Please describe the other source/s

Section 4: Source of information for visit

Which of the following information sources did you use to find out about or research {Q1.1} __before__ you arrived?

- Internet/websites
- Social media (Facebook/Twitter)
- Tourist Board brochures/leaflets
- Visitor Information Centre
- Travel Agent
- Travel operators (ferries, airlines)
- Guidebooks
- Friends/relatives/advice from others
- Promote Shetland email/telephone
- Promote Shetland Pocket Guide
- Other information source
- None of the above

Where was the Visitor Information Centre you used (e.g. Aberdeen, Inverness)

Please describe the other source/s

Which of the following did you research via the internet/websites

- Accommodation
- Transport to destination
- Transport from destination
- Visitor centres/visitor attractions
- Activities
- Festivals/Events
- History/culture
- Genealogy/family history
- Natural history
- None of the above
- Other

Please describe the other research via the internet/websites

Which of the following did you book via the internet/websites

- Accommodation
- Transport to destination
- Transport from destination
- Visitor centres/visitor attractions
- Activities
- Festival/Event tickets
- None of the above
- Other

Please describe the other booking made via internet/websites

Please write in the names of the websites you used to research/book your visit. Please type in the five main websites used.

Name of website

Name of website

Name of website

Name of website

Name of website

How satisfied were you with the each of the following aspects of planning your recent trip?

	Very satisfied	Fairly satisfied	Neither satisfied not dissatisfied	Fairly dissatisfied	Very dissatisfied	Don't know /not relevant
Availability of information online to help you plan your trip	○	○	○	○	○	○
Availability of information off-line to help you plan your trip	○	○	○	○	○	○
Getting to {Q1.1}	○	○	○	○	○	○
Availability of convenient air routes to {Q1.1}	○	○	○	○	○	○
Availability of convenient sea routes to {Q1.1}	○	○	○	○	○	○
The cost of travel to {Q1.1}	○	○	○	○	○	○

Please tell us why you were dissatisfied with the availability of information online to help you plan your trip to {Q1.1}

Please tell us why you were dissatisfied with the availability of information off-line to help you plan your trip to {Q1.1}

Please tell us why you were dissatisfied with getting to {Q1.1}

Please tell us why you were dissatisfied with the availability of convenient air routes to {Q1.1}

Please tell us why you were dissatisfied with the availability of convenient sea routes to {Q1.1}

Please tell us why you were dissatisfied with the cost of travel to {Q1.1}

During your recent visit to {Q1.1} which of the following methods did you use to obtain information about places to visit and things to do?

- A smartphone/Internet on a mobile phone
- The VisitScotland Day out app
- A laptop
- An iPad/tablet PC
- Social media (Facebook/Twitter)
- Cafe with Internet access
- Accessed Internet via a terminal in your accommodation or another public area
- Visitor Information Centre
- Visitor Information Point (located in visitor attractions)
- Brochure provided by VisitScotland or Tourist Board
- Tour operator's brochure
- Guide Books (e.g. Fodors, Lonely Planet)
- Locally produced guide books
- Local heritage information (leaflets about the local area, maps, mini guides)
- Asking other travellers
- Asking locals
- Asking proprietors/service staff
- None of the above

During and after your recent trip to {Q1.1} did you do any of the following?

- Uploaded trip photos to the Internet (eg Flickr/Facebook)
- Updated Facebook status about your trip
- Tweeted about your trip
- Blogged about your trip
- None of these

How satisfied were you with the each of the following aspects of your recent trip to {Q1.1}?

	Very satisfied	Fairly satisfied	Neither satisfied not dissatisfied	Fairly dissatisfied	Very dissatisfied	Don't know /not relevant
Availability of mobile phone reception	◯	◯	◯	◯	◯	◯
Availability of WiFi/broadband access	◯	◯	◯	◯	◯	◯

Please tell us why you were dissatisfied with the availability of mobile phone reception in {Q1.1}

Please tell us why you were dissatisfied with the availability of WiFi/broadband access in {Q1.1}

Section Five: Satisfaction with Transport

Which of the following did you use when leaving Orkney at the end of your recent visit?

- Kirkwall airport
- Kirkwall ferry
- Stromness ferry
- St Margaret's Hope ferry
- Burwick ferry
- None of these

Would you recommend {Q5.1} to your family, friends or business colleagues?

- Yes
- No

Please tell us why you would not recommend {Q5.1} and what we can do to improve?

Section Five: Satisfaction with Transport

Which of the following did you use when leaving the Outer Hebrides at the end of your recent visit?

- Stornoway airport
- Benbecula airport
- Barra airport
- Stornoway ferry
- Tarbert ferry
- Lochmaddy ferry
- Lochboisdale ferry
- Castlebay ferry
- None of these

Would you recommend {Q5.4} to your family, friends or business colleagues?

- Yes
- No

Please tell us why you would not recommend {Q5.4} and what we can do to improve?

Section Five: Satisfaction with Transport

Which of the following did you use when leaving Shetland at the end of your recent visit?

- Sumburgh airport
- Holmsgarth (Lerwick) ferry
- None of these

Would you recommend {Q5.7} to your family, friends or business colleagues?

- Yes
- No

Please tell us why you would not recommend {Q5.7} and what we can do to improve?

Section Five: Satisfaction with Transport

How satisfied were you with the following aspects of your transport to and in {Q1.1}?

	Very satisfied	Fairly satisfied	Neither satisfied not dissatisfied	Fairly dissatisfied	Very dissatisfied	Don't know /not relevant
Cost of travel in {Q1.1}						
Value for money of public transport, including local buses and inter-island ferries						
Quality of public transport						
Availability of public transport						

Please tell us why you were dissatisfied with the cost of travel in {Q1.1}

Please tell us why you were dissatisfied with the value for money of public transport in {Q1.1}

Please tell us why you were dissatisfied with the quality of public transport in {Q1.1}

Please tell us why you were dissatisfied with the availability of public transport in {Q1.1}

Section Six: Accommodation

What type of accommodation did you stay in during this recent visit to {Q1.1}. If you stayed in more than one type of accommodation, please select the type that you stayed in for the longest.

- Hotel (5 star/luxury)
- Hotel (4 star)
- Hotel (3 star)
- Hotel (1-2 star)
- Guest house/bed and breakfast
- Self-catering - rented house/cottage/chalet
- Hostel
- Camping Böd
- Static caravan
- Touring caravan pitch at serviced campsite
- Tent at serviced campsite
- Tent (non-campsite)
- Motorhome at serviced campsite
- Motorhome (non-campsite)
- Staying with friends/family
- Second home
- Other

Please type in other accommodation

Thinking about the accommodation you stayed in, how satisfied were you with the following aspects of your accommodation? If you stayed in more than one accommodation, please comment on the one you stayed in longest.

	Very satisfied	Fairly satisfied	Neither satisfied not dissatisfied	Fairly dissatisfied	Very dissatisfied	Don't know /not relevant
Quality of accommodation						
Friendly and efficient service						
Value for money of accommodation						

Please tell us why you were dissatisfied with the quality of accommodation {Q1.1}

Please tell us why you were dissatisfied with the friendly and efficient service {Q1.1}

Please tell us why you were dissatisfied with the value for money of accommodation {Q1.1}

Section Seven: Overall Satisfaction

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

	Very satisfied	Fairly satisfied	Neither satisfied not dissatisfied	Fairly dissatisfied	Very dissatisfied	Don't know /not relevant
Value for money of dining out	◯	◯	◯	◯	◯	◯
Availability of local produce when dining out	◯	◯	◯	◯	◯	◯
Availability of information locally about places you could visit during your trip	◯	◯	◯	◯	◯	◯
Quality of visitor attractions, historic sites, museums, visitor centres, etc	◯	◯	◯	◯	◯	◯
Value for money of visitor attractions, historic sites, museums, visitor centres, etc	◯	◯	◯	◯	◯	◯
Opportunities to attend local events/festivals	◯	◯	◯	◯	◯	◯
Quality of local arts and crafts products	◯	◯	◯	◯	◯	◯
Value for money of local arts and crafts products	◯	◯	◯	◯	◯	◯
Quality of local food and drink products	◯	◯	◯	◯	◯	◯
Signposting	◯	◯	◯	◯	◯	◯

Please tell us why you were dissatisfied with the value for money of dining out in {Q1.1}

Please tell us why you were dissatisfied with the availability of local produce when dining out in {Q1.1}

Please tell us why you were dissatisfied with the availability of information locally about places you could visit during your trip to {Q1.1}

Please tell us why you were dissatisfied with the quality of visitor attractions, historic sites, museums, visitor centres in {Q1.1}

Please tell us why you were dissatisfied with the value for money of visitor attractions, historic sites, museums, visitor centres in {Q1.1}

Please tell us why you were dissatisfied with the opportunities to attend local events/festivals in {Q1.1}

Please tell us why you were dissatisfied with the quality of local arts and crafts products in {Q1.1}

Please tell us why you were dissatisfied with the value for money of local arts and crafts products in {Q1.1}

Please tell us why you were dissatisfied with the quality of local food and drink products in {Q1.1}

Please tell us why you were dissatisfied with signposting in {Q1.1}

How likely are you to visit {Q1.1} in the next five years for a leisure holiday or short break?

- ◯ Very likely
- ◯ Fairly likely
- ◯ Neither likely nor unlikely
- ◯ Fairly unlikely
- ◯ Very unlikely

What could {Q1.1} tourism industry do to improve your visitor experience or encourage you to visit again?

Was there any activity you felt was not provided for adequately on {Q1.1} or not provided at all?

Overall, has your recent visit to {Q1.1} met, exceeded or failed to meet your expectations?

- Exceeded expectations
- Met expectations
- Did not meet expectations
- Not sure/can't say

Would you recommend {Q1.1} as a holiday destination?

- Yes
- No
- Don't know

What was the highlight of your recent visit to {Q1.1} or the single thing thing that you enjoyed or appreciated most?

Section Eight: Please tell us about you

What gender are you?

- Male
- Female

Which of the following age groups are you in?

- 16-24
- 25-34
- 35-44
- 45-54
- 55-64
- Over 65
- Prefer not to say

Where do you normally live?

- Scotland
- England
- Wales
- Northern Ireland
- Other UK
- Republic of Ireland
- Norway
- France
- Germany
- Italy
- Spain
- Netherlands
- Other Europe
- USA
- Canada
- Australia
- New Zealand
- Other country

Please type in other European country

Please type in other country

Section Nine: Details of Group/Party

Which of these best describes who was with you on your trip to {Q1.1}?

- Travelling alone
- Partner/spouse
- With child/children
- With parents or partner's parents
- Other members of family
- Friends
- With organised group/tour
- Business/work colleagues
- Someone else

Who else is with you on your trip?

How many people, including yourself, were in your immediate group or party visiting {Q1.1}?

If you would like to be entered in the prize draw for an iPad, please confirm your email address. Your email will only be used for the purposes of the prize draw and not for any other purpose.

Thank you for completing the questionnaire. Please now press submit to ensure we receive your response.

APPENDIX 3: FACE-TO-FACE CALIBRATION SURVEY QUESTIONNAIRE

ISLANDS CALIBRATION SURVEY - SHETLAND

Interviewer name (print): ________________________ Signature ________________________ Date ________________________ (one sheet per date)

A. Day of the week (print): ________________________ B. Interview location: **Sumburgh / Holmsgarth** (delete as appropriate)

Good morning/afternoon/evening, my name is .... from the independent research agency, Scotinform Ltd. We are carrying out an audit of visitors as they leave the Shetland Islands on behalf of the Scottish national tourism organisation, VisitScotland, Highlands and Island Enterprise and the Shetland Islands Council. **ENSURE RESPONDENT IS DEPARTING TO A RELEVANT DESTINATION (See note below)**

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

WRITE IN NUMBER, INCLUDING RESPONDENT	a.	b.	c.	d.	e.	f.	g.	h.	i.	j.	k.	l.	m.	n.	o.

2 Where do you normally live?
ONE ANSWER ONLY

Shetland……………………………………	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	**CLOSE**
Scotland……………………………………	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	**ASK Q3**
Other UK - Eng/Wal/NI…………………	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	**ASK Q3**
Overseas…………………………………	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	**ASK Q3**

3 Which of these best describes your current visit to Shetland?
ONE ANSWER ONLY

On holiday/leisure trip – overnight…	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
On holiday/leisure trip – day trip……	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
Visiting friends/relatives – overnight	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Visiting friends/relatives – day trip…	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
On business trip – overnight…………	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
On business trip – day trip……………	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
No - in transit, not visiting Shetland…	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7

THANK RESPONDENT

For information only.
RELEVANT DEPARTURE DESTINATIONS: **Ferry**: Aberdeen, Kirkwall. **Flight**: Aberdeen, Kirkwall, Inverness, Glasgow, Edinburgh, Bergen.