SHETLAND VISITOR SURVEY

2005/2006

EXECUTIVE SUMMARY

Prepared for:
Shetland Enterprise

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Total Visitors to Shetland 2006	**104,241**
Total Air and Sea Travellers	59,924
➢ Total Holiday Travellers	24,744
➢ Total Business Travellers	22,099
➢ Total VFR Travellers	13,081
Total Cruise Passengers and Crew	43,035
Total Yacht Travellers	1,292
Direct Spend of Visitors to Shetland 2006	**£16.43m**
Direct Spend Air and Sea Travellers	£15.3m
➢ Direct Spend Holiday Travellers	£7.3m
➢ Direct Spend Business Travellers	£5.4m
➢ Direct VFR and Sea Travellers	£2.6m
Direct Spend Cruise Passengers and Crew	£1.0m
Direct Spend Yacht Travellers	£163,000

Summary Results			
SURVEY	Air & Sea	Cruise	Yacht
- Expenditure	£	£	£
Accommodation	87		
Travel Costs On The Islands	33		
Food And Drink	53	1.32	137
Package Trips/Tours Local	36	14.00	
Tourist Shopping	23	6.44	36
Entertainment	8	4.67	23
Other Shopping	12	2.12	30
Miscellaneous Items	2	0.38	141
Total Spend In Shetland	**255**	**28.93**	**366**
Travel To Shetland	189		
Package Trips/Tours Non Local	36		
Total Overall Spend	**480**		
- Transport to Shetland	%	%	%
Northlink	46		
Sumburgh	48		
Smyril	6		
- Trip Purpose	%	%	%
Holiday	40	59	100
Business	35	41	0
VFR	21	0	0
Other	4	0	0
- Social Group	%	%	%
AB	27	8	17
C1	41	12	39
C2	21	5	4
DE	7	1	0
Retired/No Response	4	75	39

SURVEY	Air & Sea	Cruise	Yacht
- Party Type	%	%	%
Individual	47	9	30
Couple	25	68	30
Family	6	8	9
Friends	9	11	30
Organised Group/Tour	4		
Business/Work Colleagues	9		
Other	0	3	0
- Average Party Size	1.85	2.33	2.48
- Gender	%	%	%
Male	58	47	75
Female	42	53	25
- Age	%	%	%
Under 24	13	3	6
25-55	52	18	33
Over 55	35	79	61
- Origin	%	%	%
Scotland	44	1	43
Rest of UK	32	17	30
Overseas	24	82	27
- First Time/Repeat Visitor	%	%	%
First Time	51	93	48
Repeat	49	7	52
-Main/Second Holiday	%	%	%
Main	44	21	61
Second	56	74	30
- Average Nights Away	14.5		56.1
- Average Nights Shetland	5.8		8.0
- Main Accommodation	%	%	%
Hotel/Guest House/B&B	50		0
Self Catering	7		0
Hostel/Bod/Camp	10		0
VFR/Own Property	19		0
Yacht/Boat	>1		100
Other	4		0
Internet Usage	48	23	39
- Expectations	%	%	%
Exceeded	42	50	48
Met	55	37	52
Not Met	1	1	0
- Recommend	%	%	%
Yes	91	79	70
No	8	11	0
- Return	%	%	%
Yes		55	92
No		15	4

AIM AND OBJECTIVES

The aim of this study is to provide detailed visitor information with which to guide future tourism policy in Shetland. The main objectives are to provide an accurate estimate of volume and expenditure of visitors during 2005/2006; supply information about visitor profiles and their visit in order to guide future tourism policy; highlight principal drivers relating to Shetland as a destination of choice; provide information on the quality of the visitor experience; identify service and product gaps relating to Shetland tourism; provide results which allow comparison of key indices with previous reports.

VOLUME AND VALUE OF TOURISM

The total estimated number of visitors to Shetland was 104,241 made up of 59,924 air and sea travellers, 43,035 cruise ship passengers and crew and 1,282 yacht travellers. The total direct spend of these visitors in Shetland is estimated at £16.4m, made up of £15.3m from air and sea travellers, £1m from cruise ship passengers and crew and £163,000 from yacht travellers. In terms of spend by group holiday makers spent most at £7.3m representing 44% of all money spent, followed by business travellers at £5.4m or 33%, this shows a change from 2000, when business travellers made up the greatest proportion of total spend at 45%. Overall these figures show an increase of 37,767 visitors or 57%, with an increased spend of £4.5m or 38%, overall average spend per visitor per trip has fallen by £22 to £158, a decrease of 13%. The main reason for increased visitor numbers has been a more than doubling of cruise ship passengers and crew, although there has been a rise in visitors in all categories. The main reason for the decrease in average spend per trip, is a decrease of a night in length of stay for air and sea visitors, coupled with a proportionate increase in cruise travellers.

AIR & SEA TRAVELLERS

Trip Purpose

The main purpose of trip over the period was holiday visits at 40%, however during the low season there was proportionately more business than holiday travel. Over the year there was 35% business travel, including 3% combining holiday and business, 21%VFR with 19% on holiday and 2% visiting friends and relatives for other reasons. 4% gave other reasons for visiting. During the peak Summer season holiday travel rose to 46%, business fell to 26% and VFR remained static at 21%. 5% gave other reasons. The proportionate change since 2000, shows an increase in holiday travel in the low season period, which could indicate a development of the shoulder season. Possibly the most notable change since 2000 however is that overall holiday travel in 2006 exceeded business travel.

Visitor Profile by Trip Purpose

	Holiday		Business		VFR	
Gender	Female	53%	Male	80%	Female	62%
Age	Over 55	47%	25-55	78%	Over 55	46%
Social Class	C1	44%	C1	36%	C1	43%
Mode of Travel	Sea	77%	Air	73%	Air	59%
Season Visit	High	66%	High	50%	High	59%
Accommodation	Hotel	42%	Hotel	48%	VFR	72%
First/Repeat Visit	First Time	81%	Repeat	68%	Repeat	75%
Length of Stay	1-7 nights	79%	1-3 nights	57%	4+ Nights	79%
Most Frequent 1 Night Stay	Lerwick	66%	Lerwick	67%	Lerwick	44%
Origin	UK	58%	Scotland	71%	UK	88%

Main or Second Holiday

Holiday visitors and those VFR on holiday were asked if their visit to Shetland was their main or a second holiday for the year. Overall 56% were on a second holiday. This compares to 41% second holidays in 2000 and would appear to show a trend toward second holiday travel to the islands.

Social Group

As with other parts of the Highlands and Islands visitors to Shetland tend to be from higher social groups, with 69% from the ABC1 groups.

Party Type

Individual travel forms the largest proportion of respondent travel in Shetland at 47% although this has decreased from 52% since 2000. Couples are the most common party type to Orkney and the Western Isles, and although proportionate couple travel to Shetland has risen by 5% since 2000 to 25% it is still significantly lower than the other two island groups. This may reflect heightened proportionate levels of individual business travel to Shetland. Family parties to Shetland have declined proportionately since 2000 down from 12% to 6%, and are significantly lower than both Orkney and the Western Isles. Travel with friends has increased slightly to 9%, but is still lower than for the other two areas. Organised tours although proportionately quite low at 4% have risen by 2% since 2000, and would appear to be proportionately similar to Orkney, but lower than the Western Isles. Travel with work colleagues at 9% is significantly higher in Shetland, and again this highlights proportionately higher levels of business travel to the islands.

Party Size

Overall average party size has remained relatively stable from 2000 rising slightly from 1.82 to 1.85. Party size by purpose of trip has fallen particularly for holiday travellers, which has reduced from 2.39 to 2.12. Average party size during the low season has risen from 1.60 to 1.82, but has fallen quite significantly during the high season from 2.34 to 1.87. Average party size for Shetland travellers is lower than Orkney and the Western Isles, again this may be due to higher proportions of individual and business travel.

Gender and Age

Overall 58% of visitors were male and 42% female, and 13% were aged under 24, 65% 25-55 and 30% over 55. In general females were older than males.

Origin

There has been a slight proportionate decrease in the levels of UK visitors to the islands since 2000 down 3% to 76% and a slight increase in overseas visitors up 3% to 24%. The most significant market remains Scotland at 44%. For both high and low season and by purpose of trip, visitors predominantly come from the UK, and other than holiday visitors were predominantly Scottish. Total UK visitors vary from 92% for business travellers to 58% for holiday makers. 14% of visitors were European varying from 24% of holiday makers to 6% of business travellers. 10% of visitors were Non-European varying from 18% of holiday makers to 2% of business travellers.

Previous Visits

51% of respondents were on their first visit to Shetland. A sizeable percentage 13% had been more than 10 times, and 7% had previously lived in the islands. The most significant proportionate changes since 2000 were a rise in first time visitors, who now form more than half of all visitors, and a fall in those who have visited more than 10 times.

Arrival and Exit Points

In the main visitors enter and exit via the same route. Although there are exceptions e.g. Smyril passengers using Shetland as a stepping stone to the Mainland UK, and air travellers using Northlink due to fog at Sumburgh. The most significant route overall is Northlink Aberdeen with 36% of visitors. The most significant air route is Sumburgh Aberdeen with 21%.

Length of Stay and Areas Visited Within Shetland

On average visitors spent 14.5 nights away from home during their trip, and 5.8 nights in Shetland. This shows a rise of 1.5 nights away from home per trip, and a fall of 1 night in Shetland since 2000. The most frequent number of nights away in total was 4-7 at 30%, with 1-3 nights spent in Shetland 42%. 73% of visitors spent between 1 and 7 nights in the islands, with 8% not staying a night at all. Lerwick has a much higher average stay than any other area of Shetland at 2.51 nights. The area coming second was the South Mainland at 0.84 nights. Average figures in the main were lower for Non-Mainland than Mainland areas. Overall average stay figures have fallen by 1 night since 2000. They have also fallen in eight of the fourteen areas identified within Shetland, with two areas remaining the same. Overall and when viewed in conjunction with increased visitor numbers, and the trend toward Shetland as a second holiday area, this might suggest that visitors in general are making more trips (not necessarily all to Shetland), but these trips are of a shorter duration. Overall the most frequent number of areas visited was 4-5 at 37% with 67% visiting between 1 and 5 areas. Scottish and business visitors visit less areas within the islands than other visitors. 42% of holiday travellers visited 6-10 areas. Overall visitors visited an average of 4.5 areas, a rise of 0.3 since 2000.

Expenditure

Overall there has been a fall in the total spend of visitors both on and off the islands down from £488 in 2000 to £480 in 2006, a fall of £8. This is entirely due to falls in travel costs to, from and on the islands, predominantly to and from. This may reflect both improved travel offers from transport providers particularly for sea travel from Mainland Scotland that has seen the most significant increase in passenger numbers. It is also possible that travellers are now more likely to seek out better deals, particularly given the rise in second holidays. Overall there has been a rise in the total spend of visitors whilst on the islands up from £245 in 2000 to £255 in 2006, a rise of £10. This may not seem a significant amount given the time span between the two surveys however it should be remembered that average trip length has fallen by 1 night and if these figures are examined as a nightly/daily spend the average has increased from £36 per night to £44 per night, a rise of £8 or 22%.

Accommodation

The top 3 most frequently used accommodation types for 2000 and 2006 both in the main and overall remain the same being hotels, VFR and B&B. There has been a proportionate drop of 6.2% in main hotel usage to 28.9%, a drop of 2.3% in VFR to 18.7% and a rise of 1.7% in B&B usage to 12.1%. It should be noted however that as overall visitor numbers have risen this does not directly translate to a drop/rise in the number of visitor using these types of accommodation. In addition 8.1% used self-catering/own property as their main accommodation, 6.3% hostels and bods, 4.4% campsites/camper vans and 4.1% other types of accommodation. 53% of visitors booked all their accommodation prior to arrival. 31% stated this was not applicable and this includes those with their own property, VFR and day trippers. Those who booked represented from 85% for hotels, guest houses and self-catering to 53% for hostels and bods. 53% of campers did not book.

How Accommodation was Booking

In the main, accommodation was booked either direct with the provider, or by someone else. When examined by main accommodation, booking patterns differed according to accommodation type with B&B bod, hostel and self-catering visitors more likely to book direct with the provider, while hotel and guest house visitors more likely to have their accommodation booked by someone else, and campers are most likely not to book. The survey also asked for internet booking information. Overall 9% of travellers booked accommodation through the internet.

Sources of Information/Inspiration

The most frequently used information source overall was the internet, with 48% stating they had used it to find out about Shetland prior to visiting. The next two most frequent were none as someone else organised the trip and friends and relatives at 26% and 24% respectively. Holiday makers most frequently used the internet 65%. This analysis shows that although the levels of travellers booking accommodation on-line were relatively low at 9% the majority of travellers use the internet to research the islands prior to visiting, including business and VFR travellers where although other information sources were proportionately higher, over 1 in 3 used the internet. It also shows a significant rise in internet research since 2000 when only 6% of visitors used the internet for research. There would also appear to be an overall general increase in research prior to visit since 2000, as usage of all the information options provided rose apart from the TIC, although this might reflect more hands on research being undertaken by travellers themselves. Those who stated they had used the internet in planning their visit were asked for details in relation to areas researched and booked. The most frequently researched and booked aspects of the trip was transport to with over 1 in 3 researching on line and around 1 in 4 booking. Accommodation ranked second with around 1 in 4 researching and 1 in 10 booking. The only other area booked on-line was transport on Shetland. The most frequently researched areas among the other options given were history, culture, nature, visitor centres and attractions.

Inspiration to Visit

Overall and for both Scottish and other UK visitors the main inspiration to visit was work and VFR. Around 1 in 3 travellers stated this overall, and over 1 in 2 Scots visitors. The most important market segment to assess in terms of inspiration to visit is the holiday market. Overall their main inspiration to visit were birds, wildlife, nature and flora, followed by peace and quiet, remoteness and the scenery.

Marketing Influences to Visit

Other options to those provided within the questionnaire ranked highest with the most frequently stated being work at 24%, the second and third ranking influences were advice from friends and relatives at 19% and experience of previous visits at 14%. Again the most important market segment to assess is the holiday market, which mirrored the overall results. What is interesting to note is that direct promotional materials ranked well below word of mouth and previous experience, although overall and combined promotional materials were mentioned by 27% of respondents, and 47% of holiday respondents. In terms of direct marketing to first time visitors it would appear that the internet and guide books are slightly more effective than other options suggested.

Activities

54% of respondents stated that they had no main activity whilst in the islands, however only 16% stated they had not participated in any activities. The most frequently mentioned main activities were general sightseeing, walking and bird watching, and the most frequently participated in were short walks, beaches and scenery, general sightseeing, bird watching, historic and archaeological sites and painting and photography. 1 in 5 visitors participated in 1 or 2 activities, with 14% participating in more than 10 activities.

Potential Improvements

In terms of improvements to visit, overall 44% stated that they could not think of anything, or that no improvement was required. Just over 1 in 10 stated less expensive travel, and just over 1 in 20 improvements to public transport and eateries. In terms of activities 78% stated that they could not think of anything, or no additional activities were required. 3% mentioned a cinema, and 4% walking and eating provision improvements.

Meeting Expectations

Overall 55% of respondents felt their expectations had been met, and 42% that they had been exceeded. There were extremely low levels stating that their expectations had not been met, 1% overall. This ranged from 3% for overseas and holiday visitors to 0% for Scottish, business and VFR visitors. It is worth noting however that although levels were low, holiday makers were those who stated expectations had not been met. Compared to 2000 there are now 7% more travellers stating that their expectations had been exceeded. However there has been a rise of 2% for holiday makers, whose expectations were not met. When asked what fell shortest of their expectations, overall 79% stated that they could not think of anything. 4% mentioned transport, and 3% eating, weather and accommodation.

Highlight of Visit

Overall 14% stated the scenery was the highlight of their visit, 7% that they could not think of anything, 7% the people, 6% animals other than birds (4% stated birds) and 6% seeing friends and relatives. Overall the area of Shetland most stated was Sumburgh head.

Recommend Shetland

An overwhelming majority 91%, would recommend Shetland to others. It should be noted however that 8% overall would not recommend the islands, varying from 4% for holiday visitors to 14% for business visitors.

Opinions of Tourism Aspects Overall

The top 3 average rated aspects of Shetland tourism were archaeological sites, the quality of local food and the TIC; and the lowest things to do on wet days, shops and quality of other (non-local) souvenir products. Average scores were all above 3 showing that even those ranked lowest were on average rated as OK. Those which were most frequently stated to be poor or very poor were things to do on wet days at 10%, and eating out, availability of local food and transport to Shetland all at 6%.

Suggested Areas for Improvement

In relation to eating out the most frequently stated areas for improvement were in relation to menus, food quality and numbers of eating establishments. This was the area where most comments were made (17% of respondents). In relation to local food products the most frequently stated were in relation to lack of availability both overall and more specifically fish and at local eateries. There was also felt to be a lack of promotion. In relation to accommodation the most frequently stated were in relation to refurbishment, expense and hygiene. In relation to local arts and crafts the most frequently stated were in relation to availability, marketing and limited range. In relation to local information the most frequently stated were in relation to lack of information, timetabling issues, and more detailed maps. In relation to other areas the most frequently stated were in relation signage and walking.

CRUISE TRAVELLERS

Social Group

Three quarters of respondents were either retired, or did not specify an occupation. Orkney had proportionately more AB's and Shetland more C's.

Party Type, Party Size, Gender and Age

Couple travel accounted for 68% of cruise travel, with friends and family being the next highest at 14% each and individuals at 4%. Overall average party size was 2.33 people. 47% were male and 53% female. 79% were aged over 55, with extremely few under 24 at 3%.

Origin, First/Repeat Visits and Main/Second Holiday

There were 18% UK travellers, 34% European and 48% from the rest of the world. These figures are for respondents only. An overwhelming 93% of respondents were first time visitors, with 74% on a second holiday.

Importance of Shetland on Cruise Itinerary

The most frequent response was that Shetland was quite important in influencing their cruise choice at 46%. There were significantly more respondents stating that it was very important in 2006 than 1999, 43% as opposed to 31%, with only 8% stated that it was not important in 2006 as opposed to 22% in 1999. Therefore it would appear that there may have been an increase in the importance of Shetland as a cruise destination for passengers.

Problems Obtaining Sterling

78% of respondents stated that they did not have any problems obtaining sterling. 3% stated problems on the boat and 2% onshore. There would appear to be a slight drop in the level of passengers having exchange difficulties since 1999, falling from 8% to 6%.

Onshore Travel

90% of respondents stated that they had travelled on a bus tour, including 12% who had travelled both on a tour and independently, figures for 1999 were 86% and 14% respectively. It is possible that this is an overestimate as bus tours were targeted within both surveys in order to obtain more returns, however it is apparent that a very high percentage of cruise ship visitors undertake bus tour travel. Within the Orkney survey bus tour participation was stated as 86%, but again this figure may have been heightened due to significant bus tour sampling.

Areas Visited

98% of respondents stated they had visited Lerwick, when the 2% no responses are included this represents all visitors, which is what would be expected as all interviews were undertaken with cruise ship travellers berthing in Lerwick. Jarlsoff, Scalloway and Mousa also featured highly as places visited, which again is unsurprising as this is where bus tours tend to go.

Expenditure

Overall average spend is estimated at £28.93, with the highest proportions spent on tours, tourism shopping and entertainment and recreation. Figures show a slight decrease in terms of overall spend compared to the 1999 survey and a significant decrease in terms of tourism shopping. It is also significantly lower than overall Orkney estimated spend figures, mainly in terms of tour and tourism shopping expenditure. The 2006 survey gave what initially appear to be some somewhat surprising results when compared to the 1999 survey and the Orkney one. However on closer examination a number of issues were highlighted in terms of survey techniques, nationality, vessel size, opportunity to shop and return rates.

Sources of Information/Inspiration, Port Lecture

The most frequently used information source overall was the cruise line at 72%, the next most frequent was the internet, at 23%. 68% respondents felt that they had received adequate information at the port lecture, 63% felt that the information was accurate.

Opinions of Tourism Aspects

The top 3 ranked tourism aspects were archaeological sites, transport in Shetland and the TIC, and the lowest musical and cultural entertainment, and availability and quality of locally produced food. Average scores were all above 3 showing that even those ranked lowest were on average rated as OK. Those which were stated to be poor by 1% of respondents in all instances were museums and heritage centres, shops, musical and cultural entertainment, and availability of locally produced food. No aspects gained a very poor rating.

Potential Improvements to Visit

Overall 78% stated that they could not think of anything, or stated no improvement was required. 13% stated more time.

Meeting Expectations, Highlight of Visit

50% of respondents felt their expectations had been exceeded and 37% that they had been met, with only 1% stating they had not been met. This is more or less identical to the results obtained from the Orkney survey, where 49% felt there expectation had been exceeded and 37% that they had been met. 85% stated that they could not think of anything area falling short of expectations. 6% mentioned lack of time and 4% weather. 46% stated they could not think of a highlight, 17% stated the scenery, and 13% the tour or tour guide.

Recommend/Return to Shetland

80% would recommend Shetland as a holiday destination for friends and family. 55% stated that they would like to return to Shetland, with only 15% stating they would not.

YACHT TRAVELLERS

Social Group

It would appear that there has been a proportionate increase in C1's since 2000. There would also appear to have been a significant fall in AB's, however the majority of respondents stated they were retired without providing a previous occupation and are therefore recorded as retired/no response.

Party Type, Party Size, Gender and Age

Travel with friends accounts for 47%, with couple travel being the next highest at 25%. Overall average party size was 2.48 people. Compared to the 2000 survey, average party size has fallen from 3.2 people a drop of -0.72. There were 75% males and 25% females. In 1999 these figures were 69% male and 31% respectively. This shows the predominance of male travel on yachts. 61% were aged over 55. There were also extremely few 24 and unders at only 6%.

Origin

The largest proportion of travellers were from Scotland at 43%, followed by England at 30% and overseas 27%. In 2000 68% of respondents were from overseas, this may show a differing pattern of nationality visiting varying ports, as more Scalloway based interviews were conducted in 2006, as opposed to solely Lerwick based in 2000.

Previous Visits, Main/Second Holiday, Importance of Shetland

48% of respondents in 2006 and 42% in 2000 were first time visitors. 61% were on their main holiday for the year. 61% also felt that Shetland was very important on their trip itinerary.

Ports of Call

48% of respondents had come from Orkney, and 13% from Norway. The next port of call was most frequently stated as Aberdeen at 26%, followed by the rest of Scotland

and Norway both at 13%. This data would tend to show the major flows of yacht traffic both to and from Orkney and Mainland Scotland. Mainland locations within Shetland tended to be the most visited in 2006, with 87% of respondents stated they had visited Lerwick. In 2000 Mainland areas also featured highly, however there was a much more Lerwick focused travel pattern with 100% having visited Lerwick, and the next highest being 45% for Fair Isle. These differing patterns may be influenced by the differing survey locations.

Nights Away

Visitors on average spent 56.1 nights away from home during their trip, and 8 nights in Shetland. This shows a fall of 54.9 nights away from home per trip, and a rise of 1.7 nights in Shetland since 2000.

Expenditure

Overall average spend is estimated at £366 per yacht, with the highest proportions spent on food and drink and miscellaneous purchases. Figures show a decrease of £41 in terms of overall spend compared to the 2000 survey.

Sources of Information/Inspiration/Feedback & Satisfaction

The most frequently used information sources were the internet and tourist brochures/leaflets both at 23%. The top 3 ranked tourism aspects were archaeological sites, quality of local food and the TIC, and the lowest things to do on wet days, quality of non-local souvenirs and eating out. Average scores were all above 3 showing that even those ranked lowest were on average rated as OK. The only aspect stated to be very poor by 4% of respondents was musical and cultural entertainment.

Potential Improvements to Visit

57% stated that they could not think of anything, or stated no improvement was required. 17% stated improvements to pier and pier services, and 13% improvements to internal transport.

Meeting Expectations, Highlight of Visit

48% of respondents felt their expectations had been exceeded and 52% that they had been met. The figures for 2000 were 68% and 26% respectively, which would tend to suggest a rise in satisfaction levels among yacht travellers. 71% stated that they could not think of anything, falling short of expectation. 13% mentioned eating out. Overall 22% stated the people as the highlight of their visit, 17% stated sailing routes, and 13% scenery.

Recommend/Return to Shetland

70%, would recommend Shetland to friends and family. No respondents said they would not. An overwhelming majority of 92%, would make a return visit.