

progressive

The Outer Hebrides
Visitor Survey 2017
Comhairle nan Eilean Siar
and VisitScotland
March 2018



COMHAIRLE NAN EILEAN SIAR

Contents



Project background



Trip characteristics



Objectives



Visitor experience



Method and analysis



Volume and value



Visitor profile



Comparisons to previous years



Visitor journey



Summary and conclusions

Project background



- Tourism is a major contributor to local economies in the Outer Hebrides. In order to maximise the value of visitors to the islands, the 'Tourism Outer Hebrides 2020' (TOH 2020) strategy was developed by the TOH 2020 Leadership Group which includes representatives from Comhairle nan Eilean Siar, Highlands and Islands Enterprise, VisitScotland and Outer Hebrides Tourism (OHT).
- The TOH 2020 Leadership Group has key business objectives to increase tourism, including sustainable growth, continuous development of high quality tourism products, and extending the season.
- Strategies to achieve these objectives need to be based on sound intelligence about the volume, value and nature of tourism to the islands, as well as a good understanding of how emerging consumer trends are influencing decisions and behaviours, and impacting on visitors' expectations, perceptions and experiences.
- Comhairle nan Eilean Siar, in partnership with VisitScotland, commissioned Progressive to conduct a visitor survey on the Outer Hebrides to provide robust and up-to-date estimates of visitor volume and value, as well as information on experiences, motivations, behaviours and perceptions.
- Progressive conducted a similar visitor survey on behalf of Shetland Islands Council and Orkney Islands Council. This report details findings from the Outer Hebrides visitor survey only.



Project objectives



- The research data was gathered using a 2 stage approach:
 - Stage 1 – Calibration interviews conducted face-to-face with visitors at key exit points from the islands – ferry terminals and airports
 - Stage 2 – Follow-up online survey to gather more detailed feedback
- Stage 1 - Calibration Interviews
 - The calibration interviews were conducted using CAPI technology (Computer Aided Personal Interviewing)
 - Each interview lasted approximately 3 minutes
 - Data gathered included profiling data and type of trip – leisure, visiting friends and relatives (VFR), business
 - Sampling was spread across 2017 - 27th January to 5th December.
 - The sampling points were: Stornoway Airport, Benbecula Airport, Barra Airport, Stornoway Ferry Terminal, Tarbert Ferry Terminal, Lochmaddy Ferry Terminal, Lochboisdale Ferry Terminal and Castlebay Ferry Terminal
 - Random sampling approach to achieve a representative sample of people leaving the islands in terms of visitors and island residents
 - In total, 3,829 calibration interviews were completed – 2,228 visitors; 1,442 island residents; 159 other

- Stage 2 - Online Survey
 - Respondents were asked if they would like to take part in an online survey at the end of the calibration interview
 - Email addresses were gathered and the survey was sent within a two-week period of the calibration interview, allowing them time to arrive home.
 - In total, 1,694 visitors to the Outer Hebrides agreed to take part in the online survey. 120 email addresses bounced back leaving a potential sample size of 1,574.
 - The online survey remained open for 3 weeks for each visitor
 - A reminder was sent halfway through the 3-week period
 - The final sample response was 684 completed online surveys (43% response rate)
- Additional stage - Qualitative interviews
 - A small number of tele-depths were also conducted with respondents who agreed to take part in a follow-up discussion about their visitor experience – 6 tele-depths with visitors to the Outer Hebrides
 - These provided some qualitative insight on the visitor experience and potential areas for improvement
 - Each lasted 30-40 minutes in length


Analysis

Statistical validity



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

Sample type	Sample size	Margin of error
Total Calibration	3,829	+/- 0.31% to +/- 1.58%
Total Sample of Visitors - Calibration	2,228	+/- 0.41% to +/- 2.07%
Total Sample - Online	684	+/- 0.74% to +/- 3.74%
Leisure Visitors - Online	525	+/- 0.85% to +/- 4.27%
VFR Visitors - Online	60	+/- 2.52% to +/- 12.64%
Business Visitors - Online	99	+/- 0.96% to +/- 9.84%

- All bases shown are the unweighted bases. Bases vary by question depending on routing. Where base sizes are low a caution sign is shown. 
- Where figures do not add to 100% this is due to multi-coded responses or rounding.
- On some charts figures of 0% and 1% are not shown for ease of reading.
- Only statistically significant differences are reported.

Analysis

Sub-sample analysis



- The analysis detailed in this report includes highlighting statistically significant differences between sample sub-groups.
- Analysis by visitor type is provided on the total sample - Leisure, visiting friends and relatives (VFR), Business
- Analysis for other sub-groups is shown for the Leisure sample only. These sub-groups are:
 - Origin 1 – Scotland; rest of UK; all overseas
 - Origin 2 – Scotland; rest of UK; Europe; North America; other overseas
 - Gender – male; female
 - Age – 16 - 34; 35 - 44; 45 – 54; 55 – 64; 65+
- The sample sizes for each sub-group (online sample) are detailed below:

Visitor type	Base (unweighted)
Leisure	525
VFR	60
Business	99

Origin (Leisure)	Base (unweighted)
Scotland	207
Rest of UK	202
All overseas	116
Europe	66
North America	34
Other overseas	16

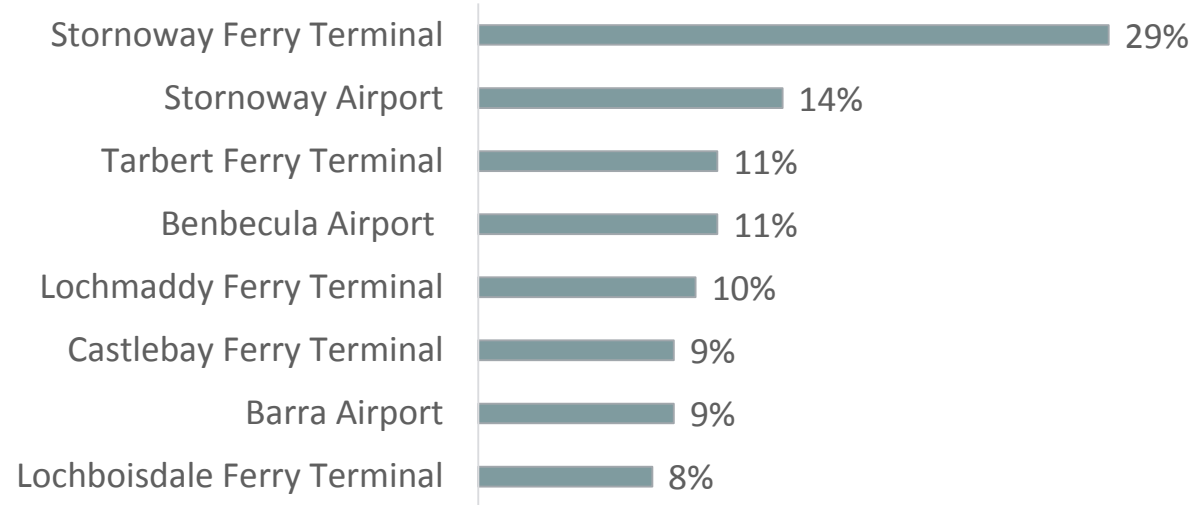
Demographics (Leisure)	Base (unweighted)
Male	267
Female	258
16 – 34	66
35 – 44	57
45 – 54	123
55 – 64	150
65+	128

Sample

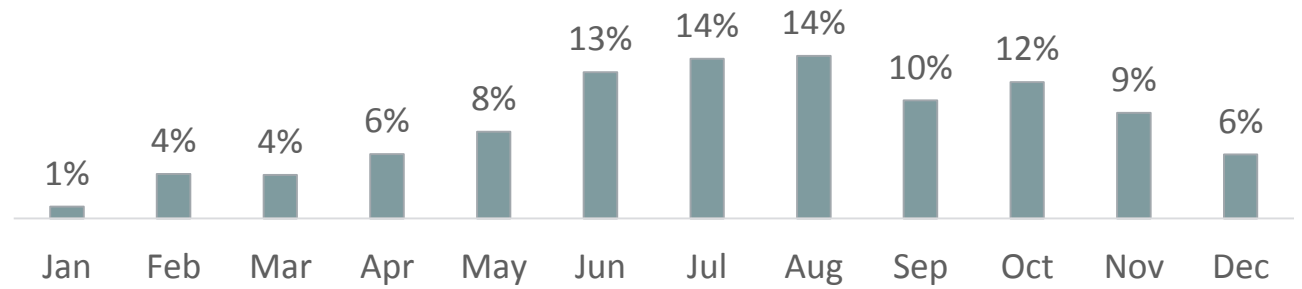
- The sampling plan was designed to provide a spread of interviews across exit points and months of the year.
 - Interviewing was therefore higher in the peak season months of June, July and August.
 - Passenger data by exit point was not available for all exit points at the start of the project, therefore, the sampling aimed to achieve a broad spread across points. We also aimed to achieve statistically robust samples at all 8 sampling points.
 - Passenger data obtained at the end of 2017 indicated that the sample over-represented Castlebay, Barra Airport, Lochboisdale and Benbecula and under-represented Stornoway Ferry Terminal and Airport and Tarbert.
- Weighting was, therefore, used to correct the data for these inconsistencies with actual passenger numbers.



Sampling point



Month



Base (All): 3829

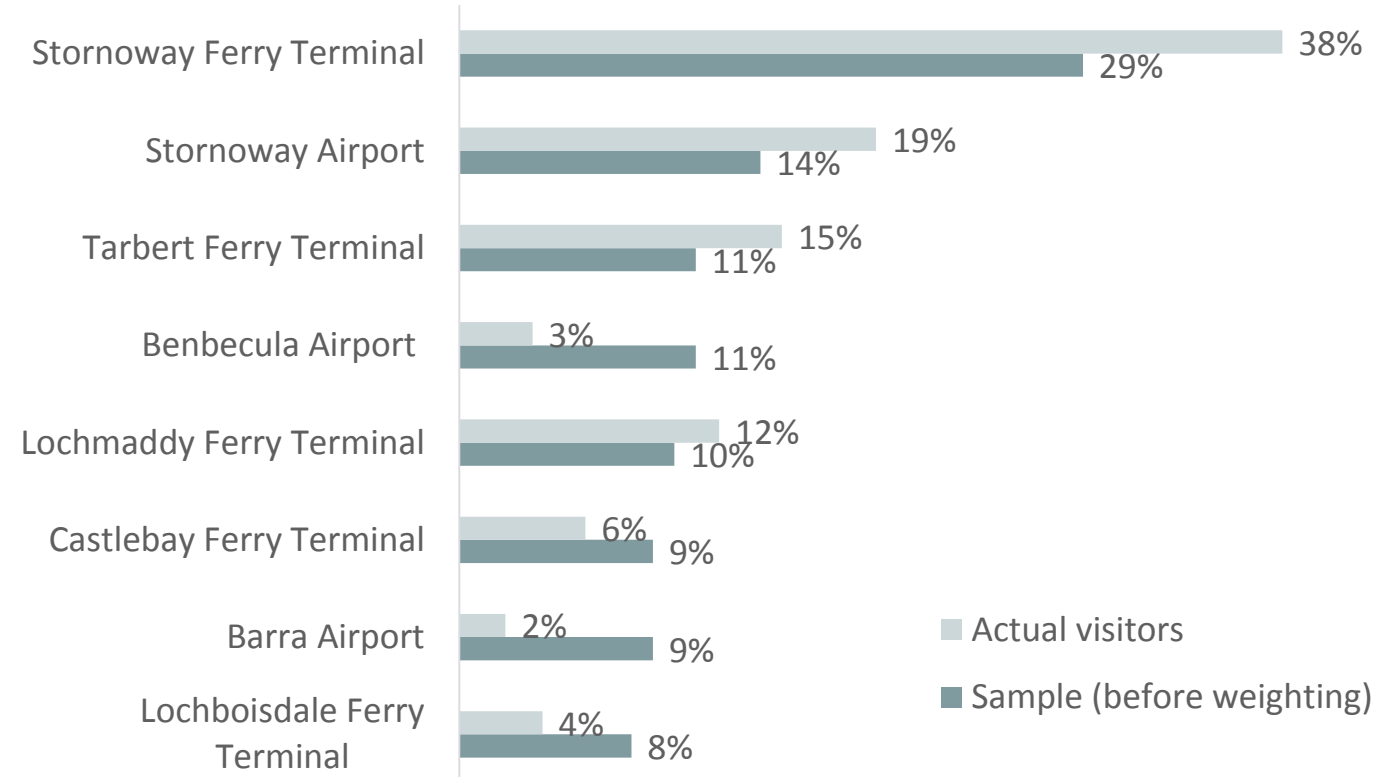
Data weighting

Calibration survey

- The calibration data was weighted by sampling point to reflect the actual distribution of visitors in 2017.
- Visitor numbers were provided by HIAL (airports) and Caledonian MacBrayne (ferry terminals).



Sampling point



Base (All): 3,829

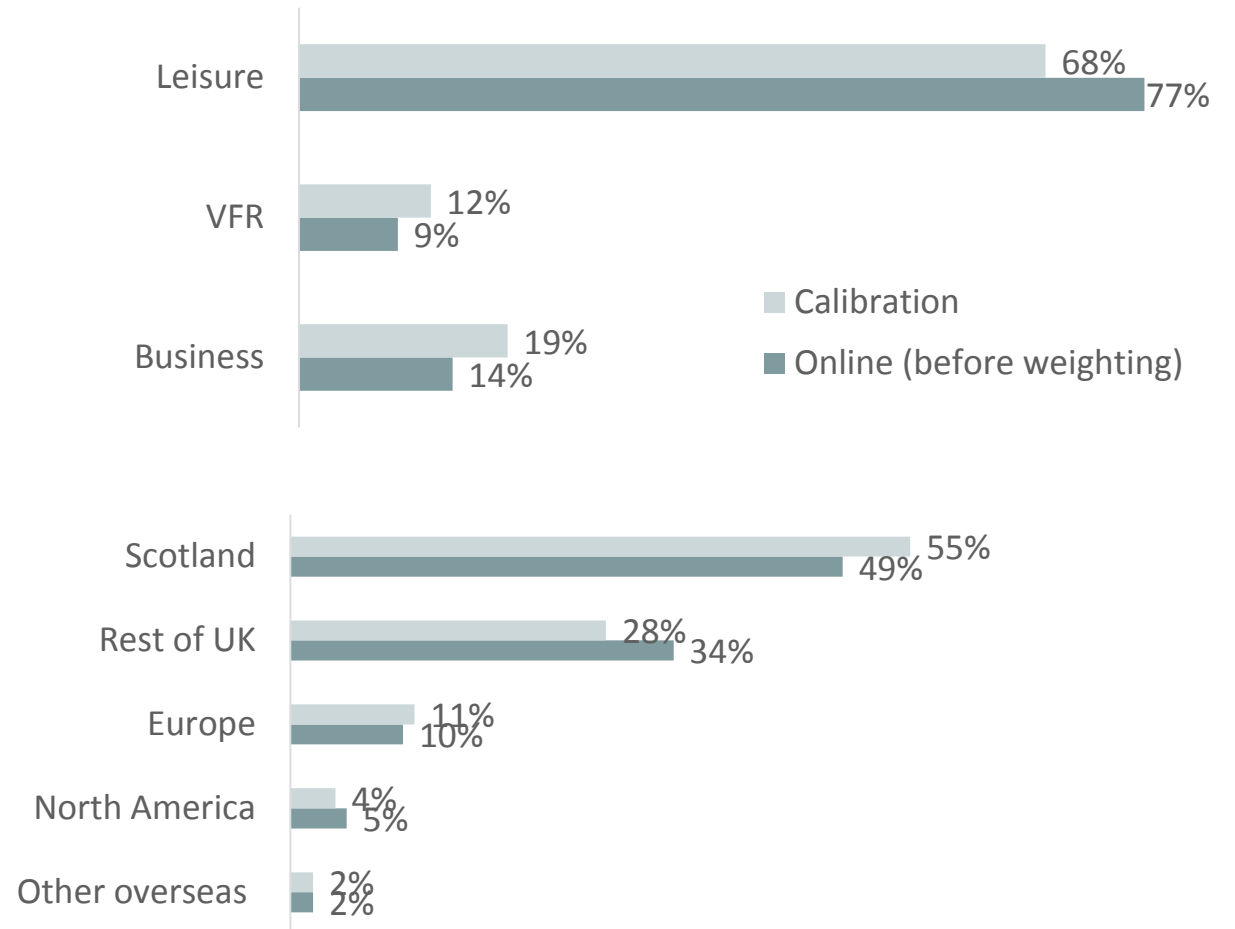
Data weighting

Online survey

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

*Note: The percentage in 'other' category (1%) from the calibration survey was distributed evenly across Leisure, VFR and Business codes for online weighting as no 'other' code was available online for reasons of routing.

Visitor type and origin



Base (All): Calibration 2,228, Online 864



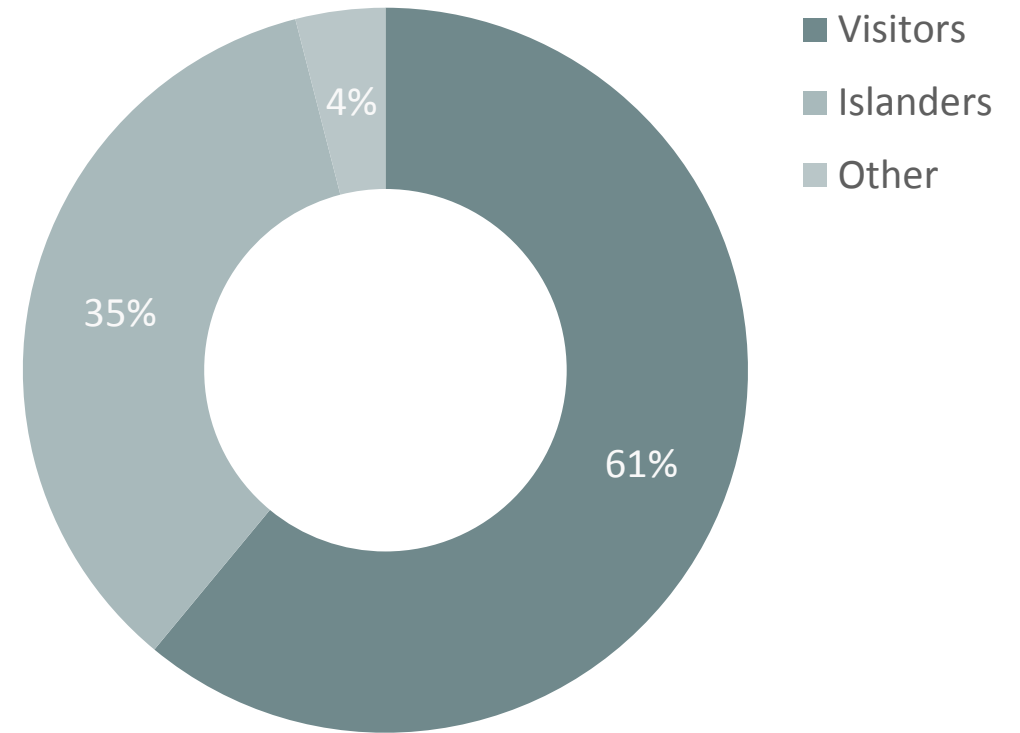
Visitor profile

Visitor profile

Proportion visitors

- In total, 61% of all people interviewed for the calibration survey were visitors to the Outer Hebrides.
- 35% were islanders and 4% were people in transit between islands; haulage drivers only visiting for the day; or people on a cruise or yacht trip.

Islanders vs visitors

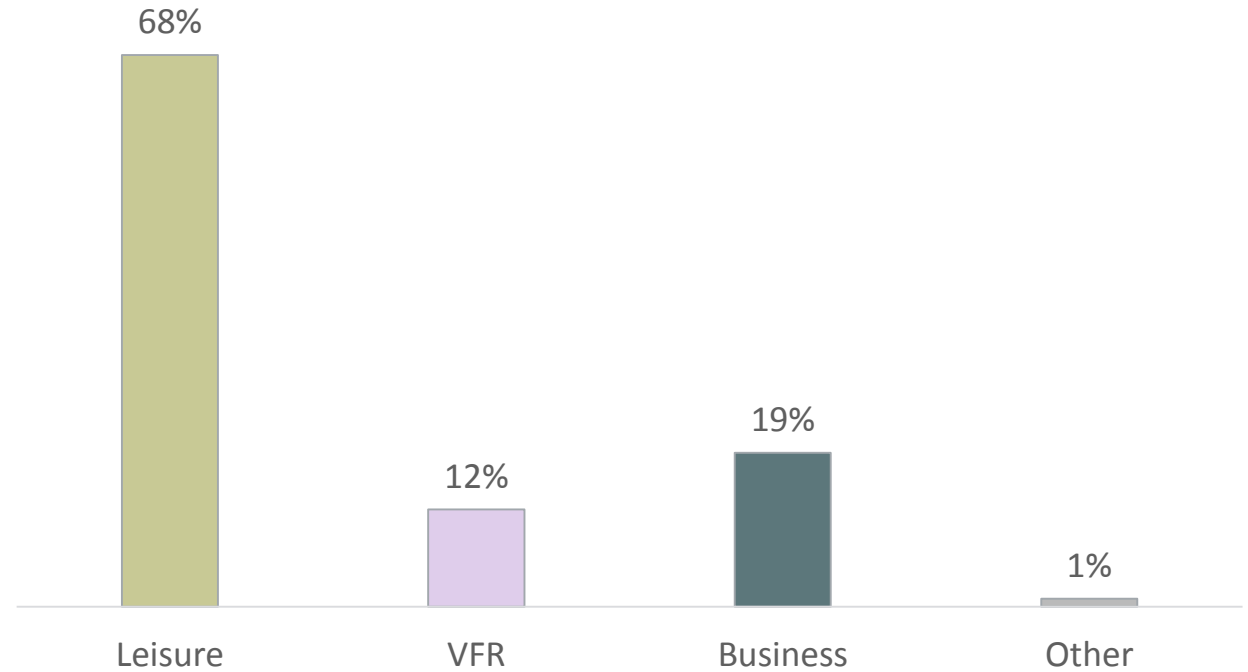


Visitor profile

Trip purpose

- The majority of visitors to the Outer Hebrides in 2017 were leisure visitors (68%). Approximately one fifth were visiting for business or work purposes, while 12% were visiting friends or relatives (VFR).

Trip Purpose

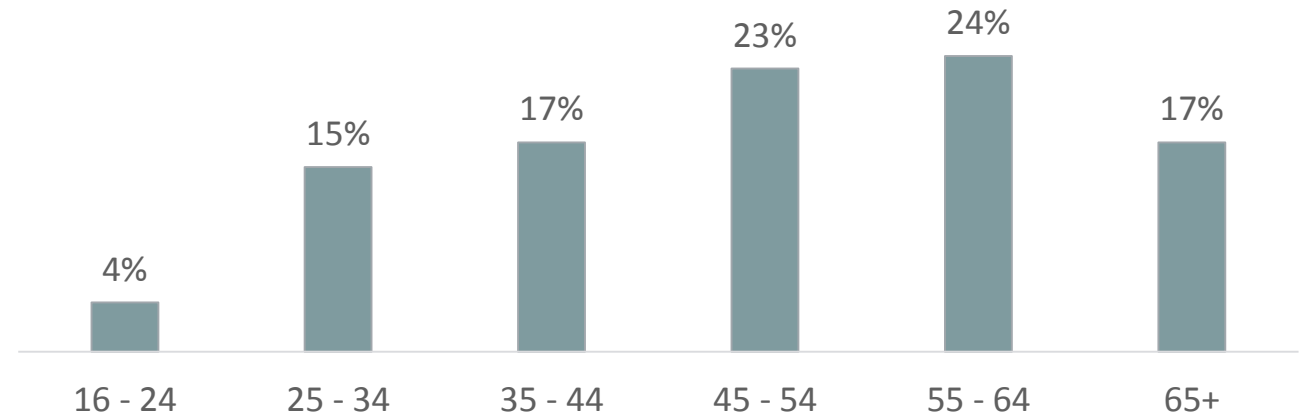
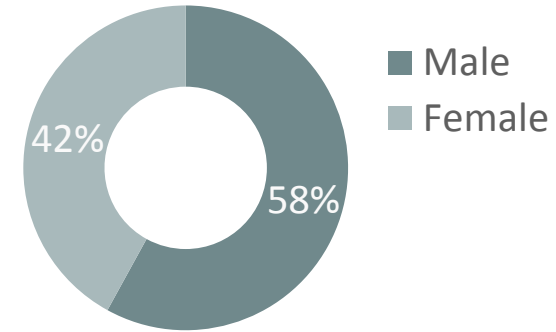


Visitor profile

Demographics

- The total sample of visitors to Outer Hebrides was skewed towards males (58%). This finding was influenced by the proportion of males amongst business visitors (77%).
- The majority of visitors were aged over 44 years old (64%), with 32% aged between 25 and 44 and only 4% 16 to 24.

Age and gender



Base (All calibration visitors): 2,228

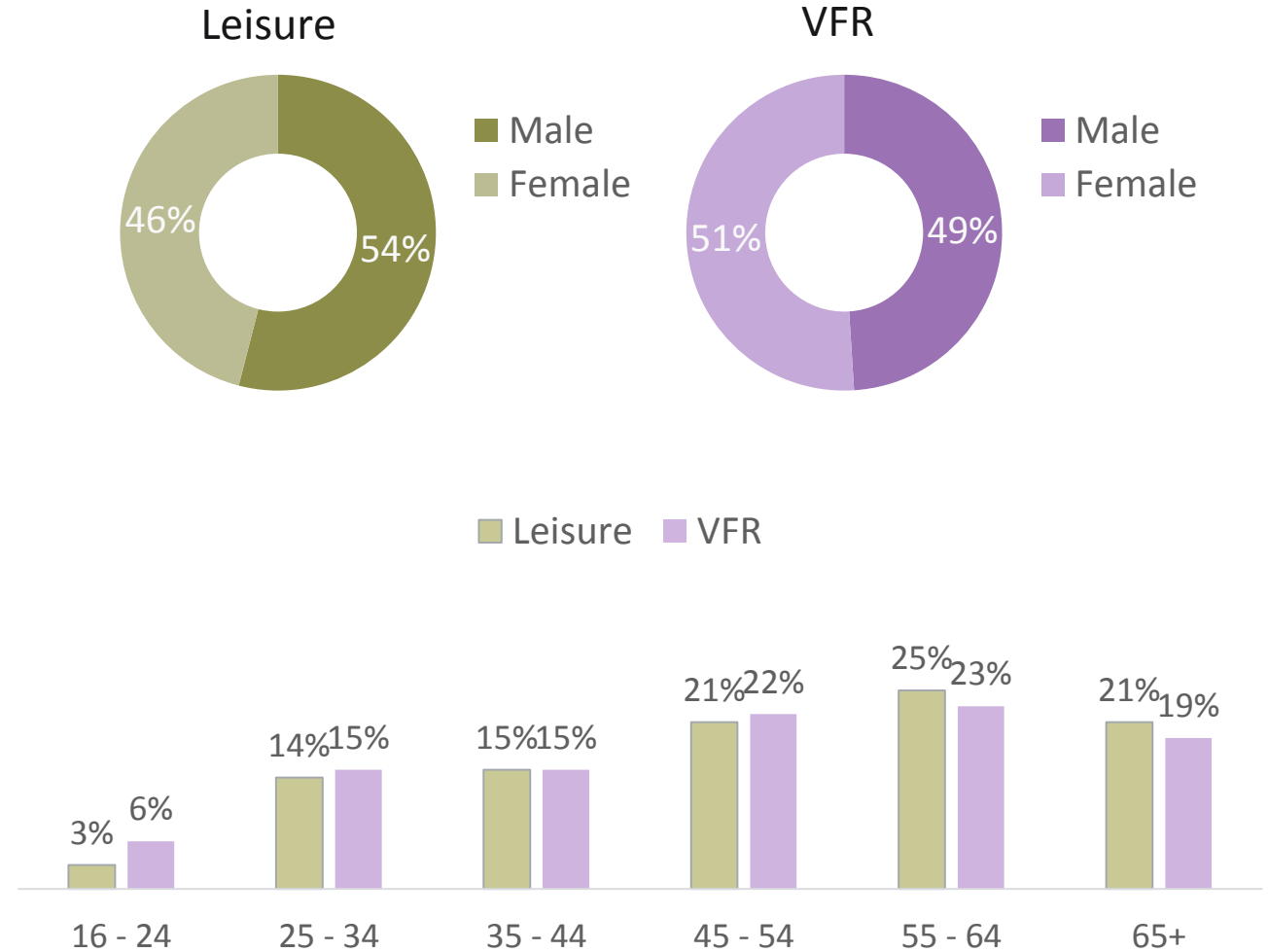
Visitor profile

Demographics

- There were slightly more male (54%) than female (46%) Leisure visitors. VFR visitors were evenly split between males and females.
- The age profiles of both Leisure and VFR visitors were very similar and reflect the age profile of the overall sample.



Age and gender



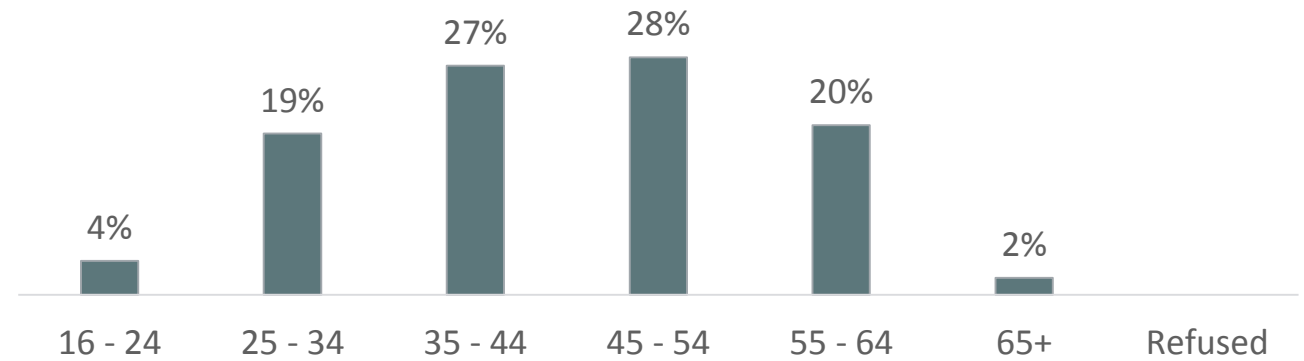
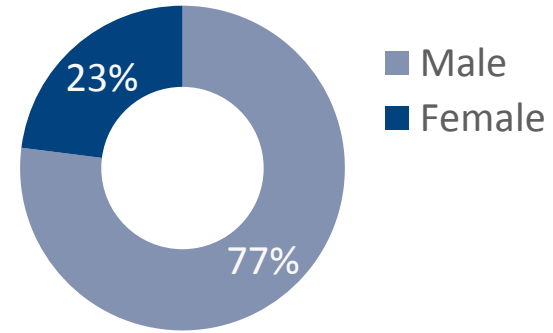
Base (All Leisure / VFR calibration visitors): Leisure 1,486, VFR 275

Visitor profile

Demographics

- Business visitors were predominantly male (77%).
- There was a wide spread of age groups for business visitors with 50% aged 45 years or older and 50% under 45.

Age and gender - Business



CQ4: Gender
CQ5: Which of the following age groups are you in?

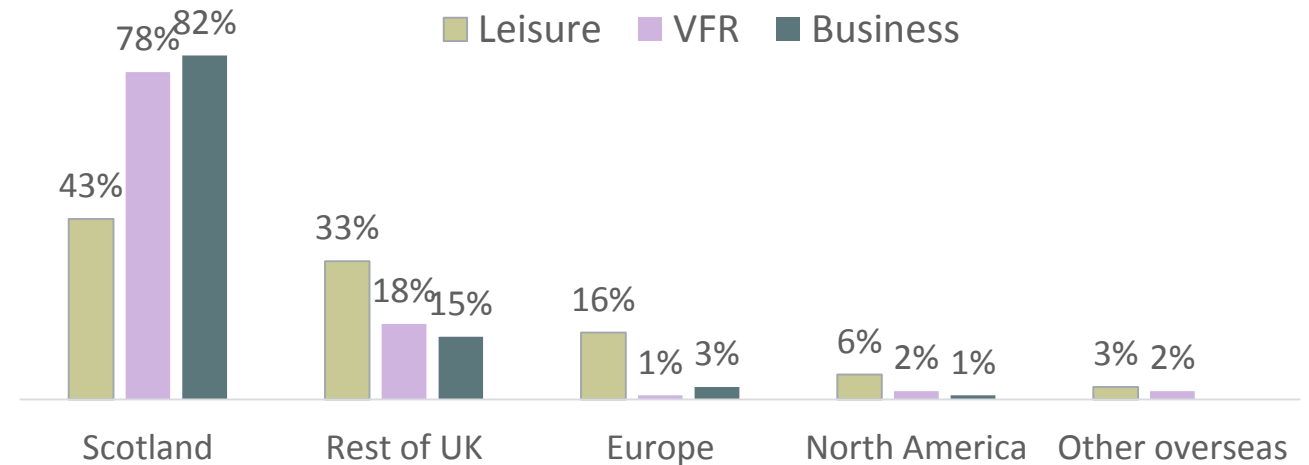
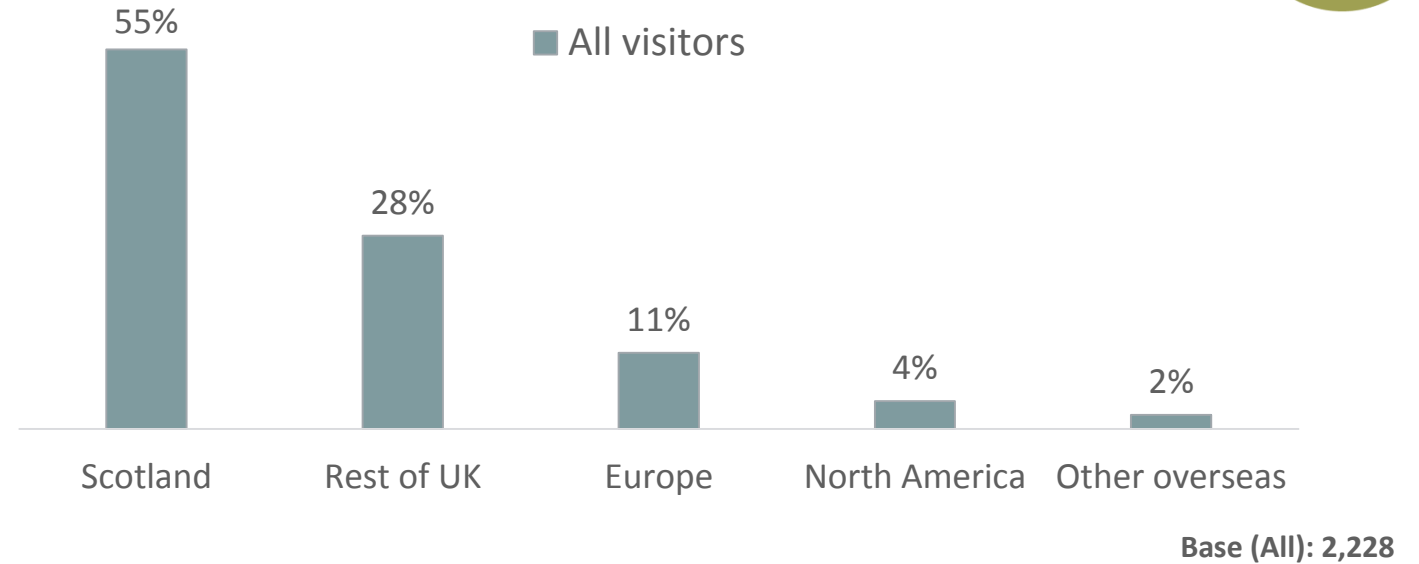
Base (All Calibration Business): 436

Visitor profile

Origin

- The majority of all visitors to the Outer Hebrides in 2017 were from the UK (82%), with 55% from Scotland and 28% from the rest of the UK.
- Of the 18% overseas visitors, the largest proportion was from Europe (11%), with a further 4% from North America and 2% from other countries – predominantly Australia.
- Amongst Leisure visitors the proportion of overseas visitors was higher (24%) and the proportion of visitors from Scotland was lower (43%). This contrasts with VFR and Business visitors, who were predominantly from Scotland.

Origin

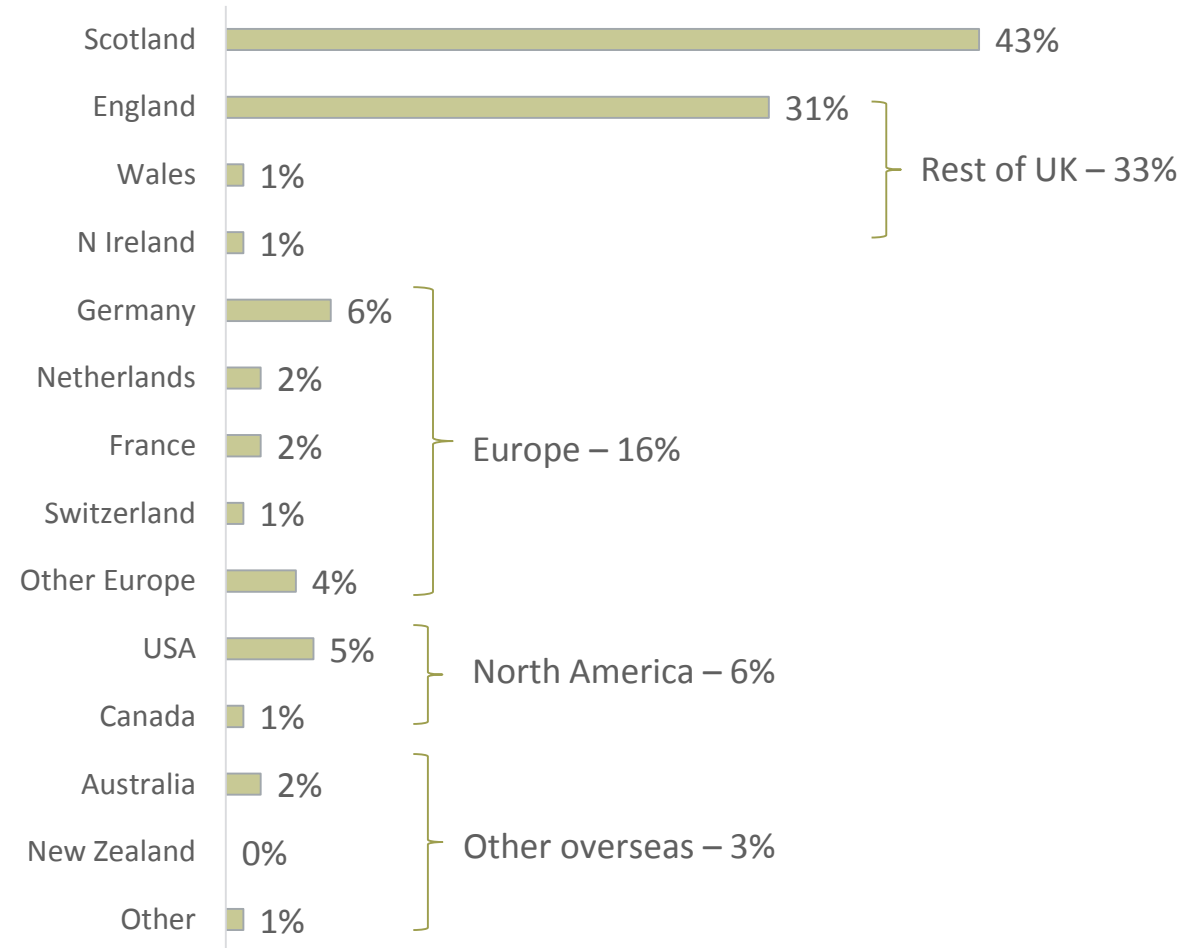


Visitor profile

Origin

- Leisure visitors came from a wide range of European countries, however, the most prevalent were Germany (6%), the Netherlands (2%) and France (2%).
- The USA accounted for 5% of Leisure visitors, while 2% were from Australia.

Origin – Leisure visitors



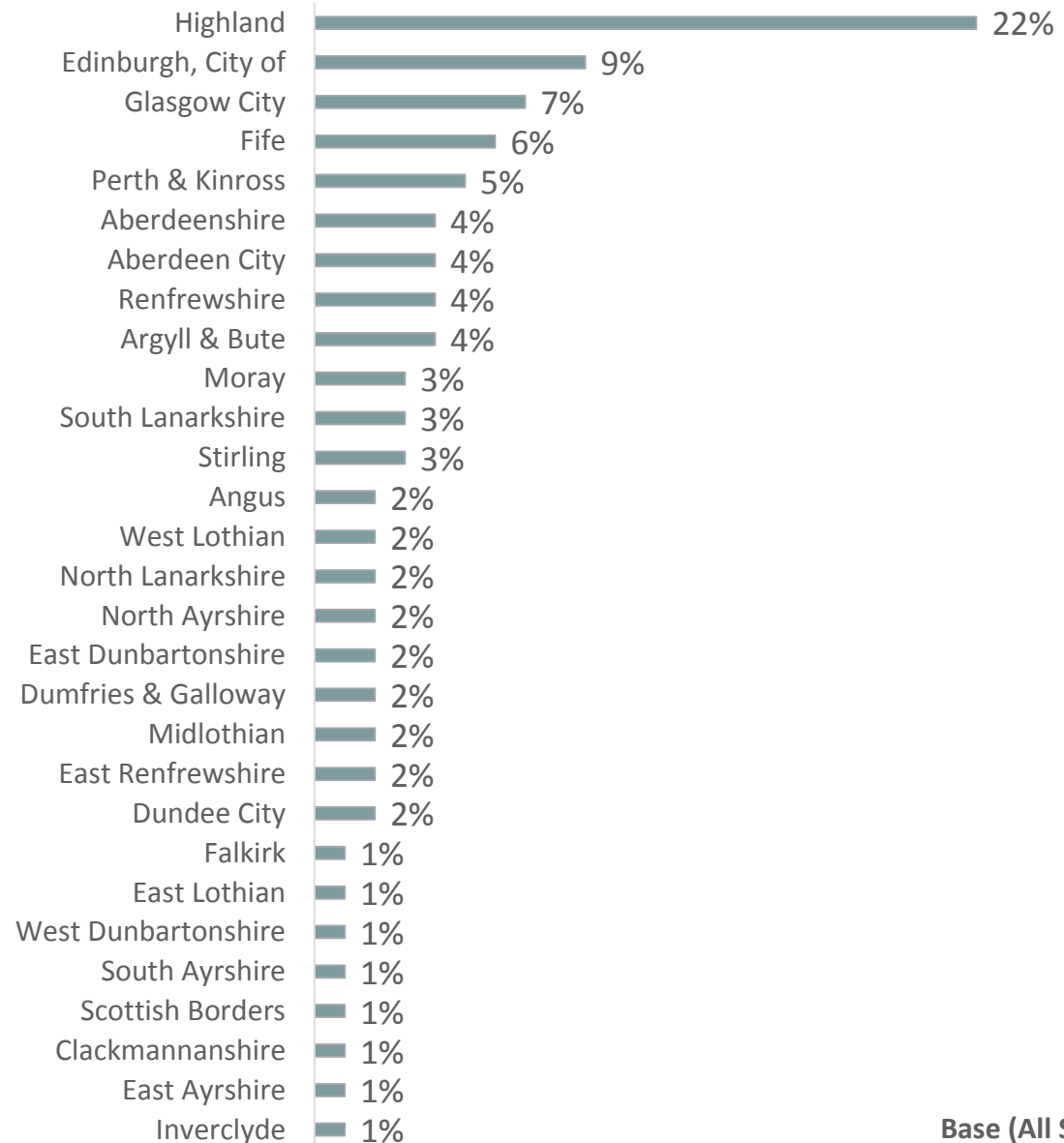
Base (All calibration Leisure): 1,486

Visitor profile

Origin

- The largest proportion of visitors from Scotland came from the Highland Council area (22%). This was particularly the case for Business visitors (33%).
- Around one tenth of visitors from Scotland came from Edinburgh, followed by 7% from Glasgow.
- This profile of visitors was very similar across Leisure, VFR and Business visitors as detailed over.

Origin – Scotland visitors



Base (All Scotland visitors): 332

Visitor profile

Origin

- A higher proportion of Business visitors were visiting from the Highlands than Leisure or VFR visitors, but generally the profile of visitors was very similar across Leisure, VFR and Business visitors.

Origin – Scotland visitors by visitor type



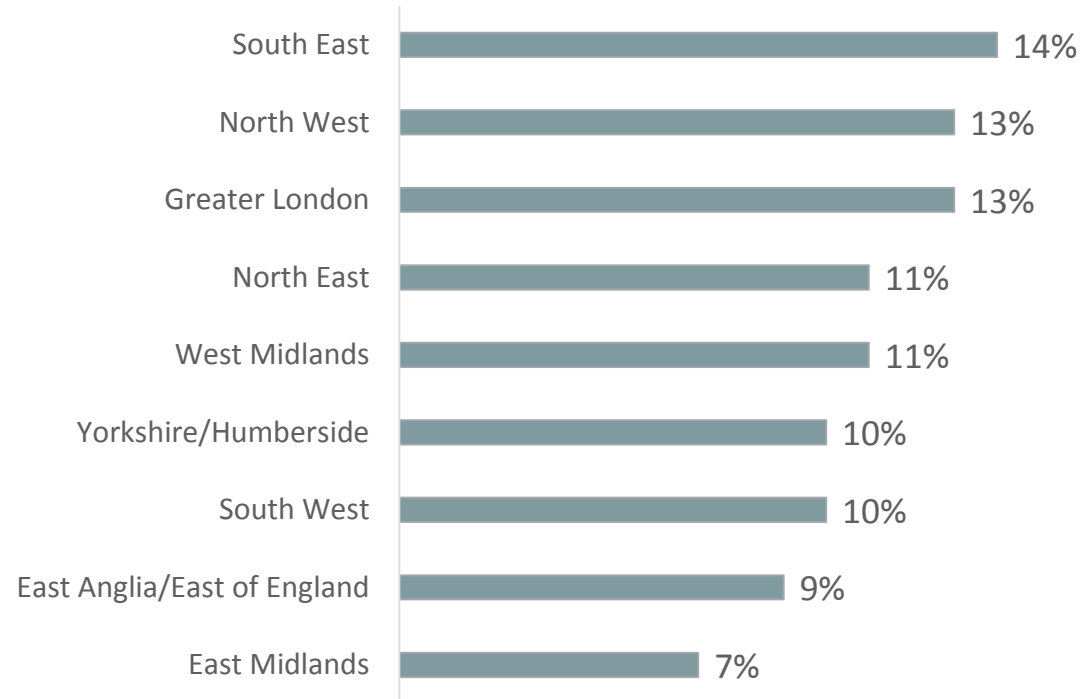
	Leisure	VFR	Business
Highland	15%	24%	33%
Edinburgh, City of	8%	9%	10%
Glasgow City	8%	4%	6%
Fife	5%	7%	6%
Perth & Kinross	7%	4%	4%
Aberdeen City	3%	2%	5%
Aberdeenshire	5%	7%	1%
Argyll & Bute	4%	2%	6%
Renfrewshire	6%	2%	1%
Moray	5%	-	1%
South Lanarkshire	3%	2%	3%
Stirling	3%	4%	3%
Angus	2%	4%	1%
Dumfries & Galloway	1%	2%	3%
Dundee City	1%	-	3%
East Dunbartonshire	2%	-	3%
East Renfrewshire	1%	7%	1%
Midlothian	2%	2%	1%
North Ayrshire	2%	-	3%
North Lanarkshire	2%	2%	3%
West Lothian	2%	4%	-
Clackmannanshire	1%	2%	-
East Ayrshire	2%	-	-
East Lothian	-	4%	1%
Falkirk	1%	2%	1%
Inverclyde	0%	-	3%
Scottish Borders	2%	-	-
South Ayrshire	2%	-	-
West Dunbartonshire	1%	-	-
Base: (All living in Scotland)	207	45	80

Visitor profile

Origin

- Visitors from England came from a variety of regions.
- The top origin locations were the South East, North West and Greater London.

Origin – England visitors



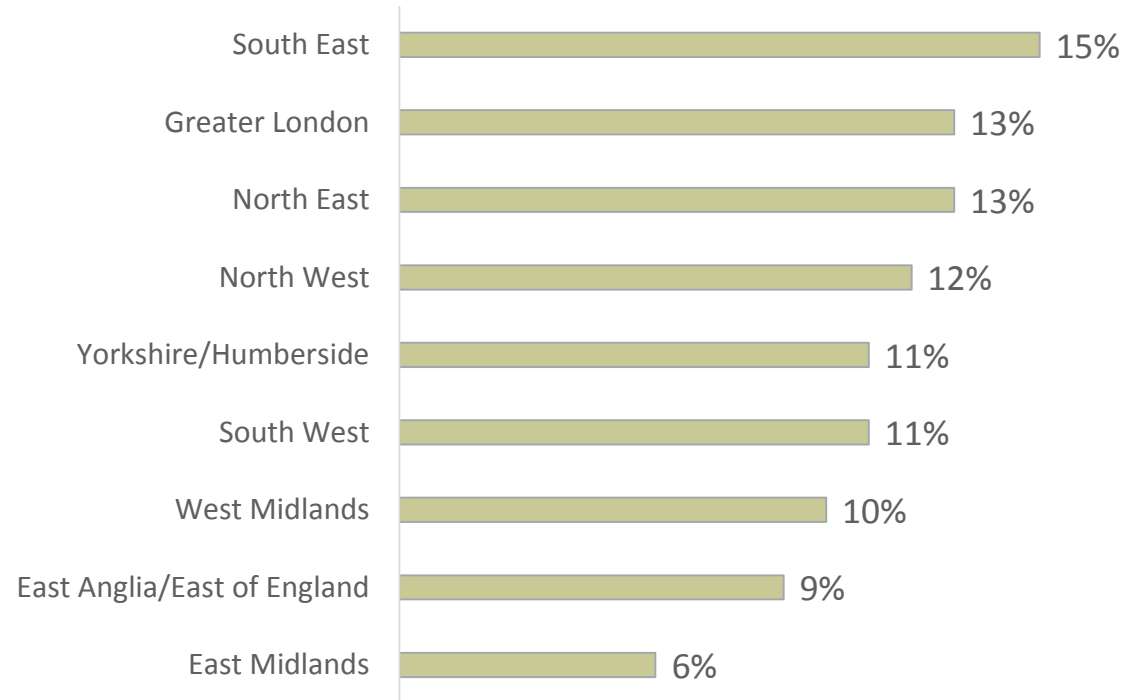
Base (All England visitors): 218

Visitor profile

Origin

- The profile of Leisure visitors from England was very similar to the overall profile of England visitors.

Origin – England visitors Leisure visitors



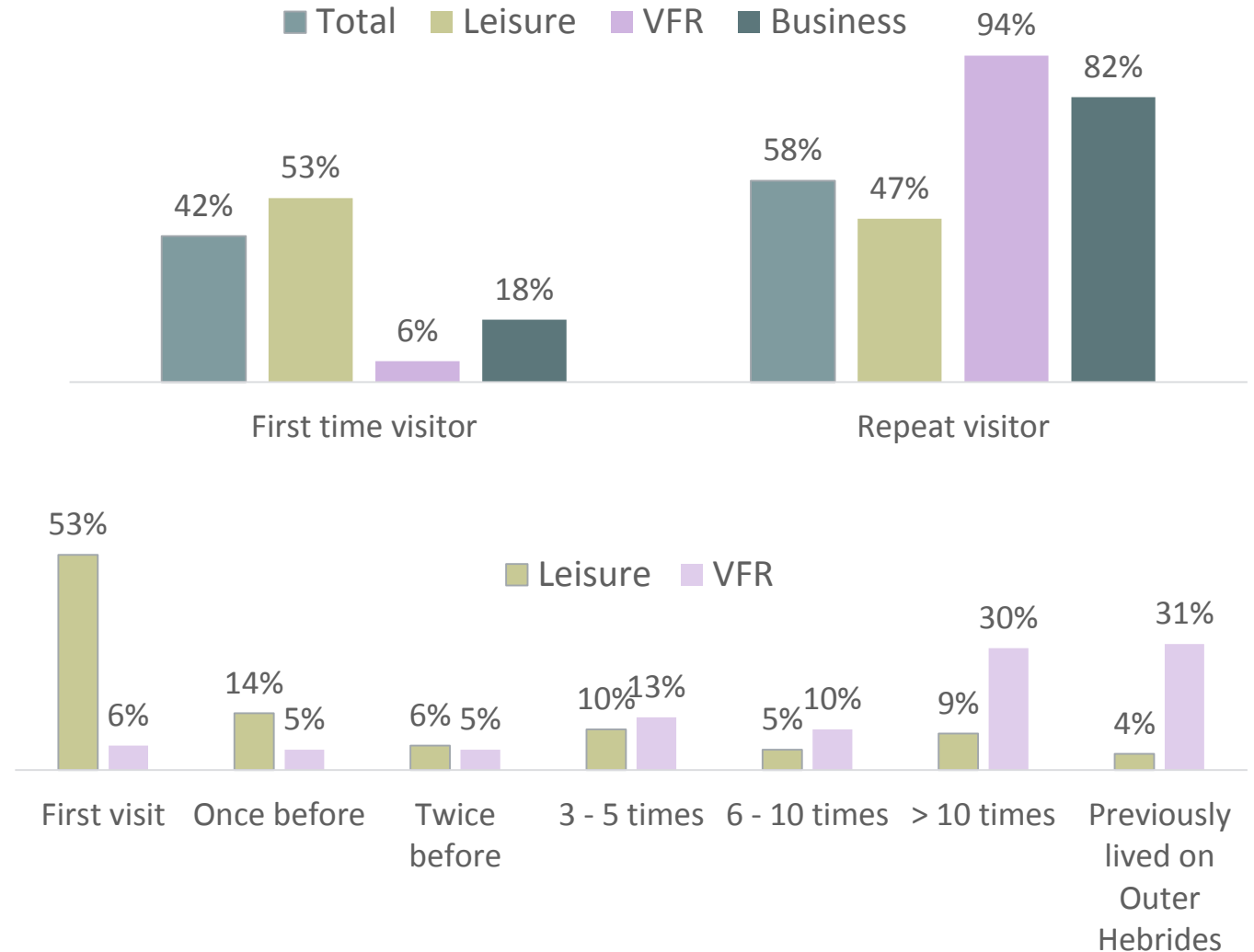
Base (All England visitors): Leisure 192

Visitor profile

First time/repeat visitors

- Just under three fifths of visitors to the Outer Hebrides reported that they had been to the islands before, while around two fifths were on their first visit.
- Just over half (53%) of Leisure visitors were first time visitors, while the majority of VFR (94%) and Business (82%) visitors had been before.
- Amongst the Leisure visitors, overseas visitors were more likely to be first time visitors (79%) than Scotland (38%) or rest of UK visitors (54%).

Number of times visited the Outer Hebrides



Q16: Approximately how many times have you visited Outer Hebrides before your recent trip?

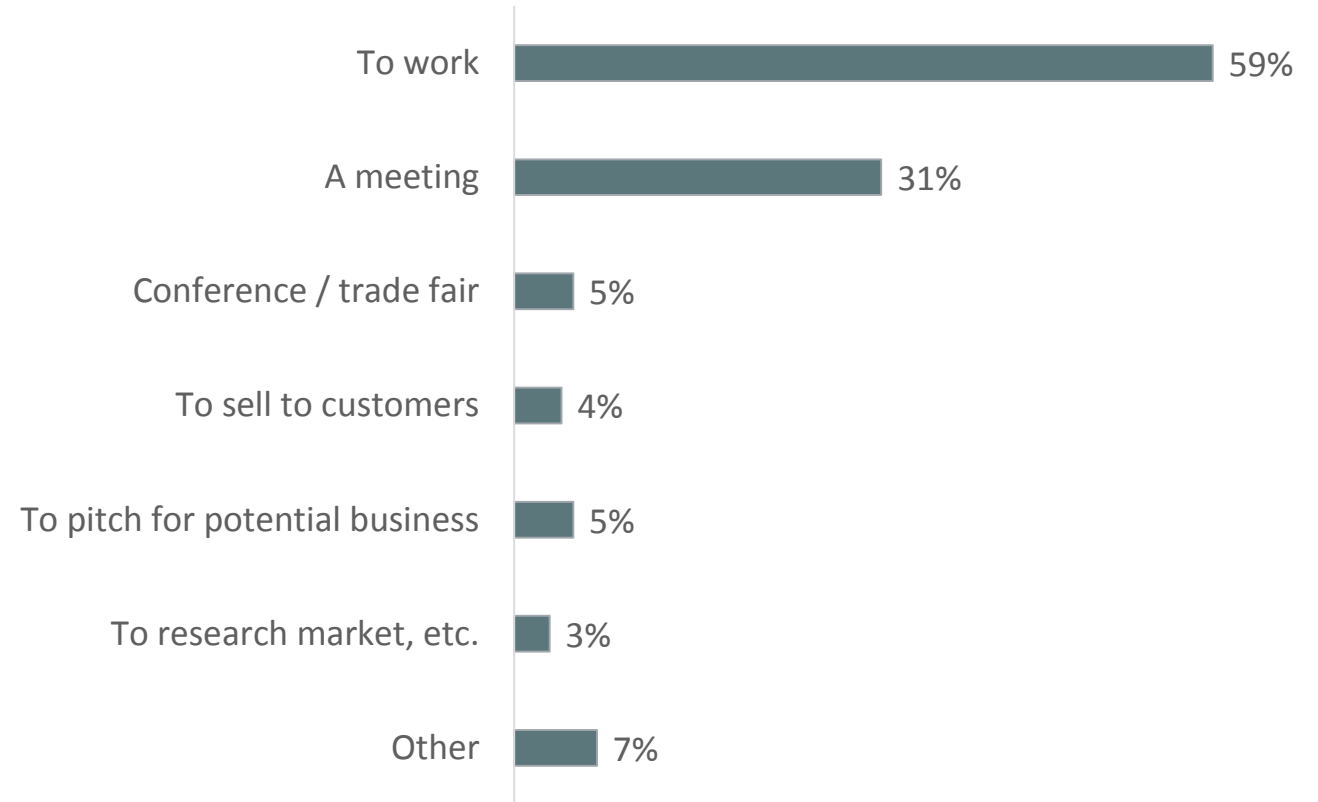
Base (All, excl. rotation shift workers): Total 648; Leisure 525; VFR 60; Business 63

Visitor journey

Business journey

- The largest proportion of Business visitors had been to the Outer Hebrides to work for a period of time.
- A further one third were attending a meeting.

Reason for visiting the Outer Hebrides - Business

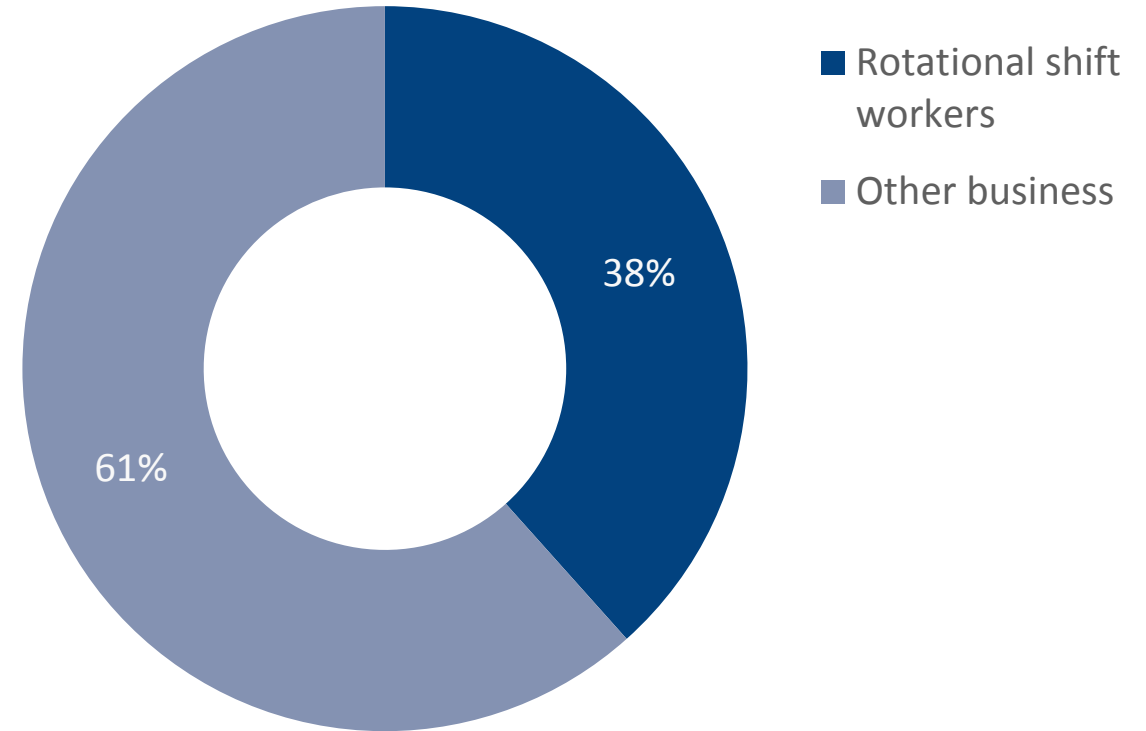


Visitor profile

Business

- Overnight Business visitors were asked if they would be staying on the islands for an extended period of time, but normally live on the mainland. Almost two fifths (38%) of business respondents stated that they were staying for a long period of time.

Rotational shift workers



CQ3b: Was your visit to this island to work for an extended period of time, but you normally live on the mainland, e.g. you are on a rotational shift pattern?

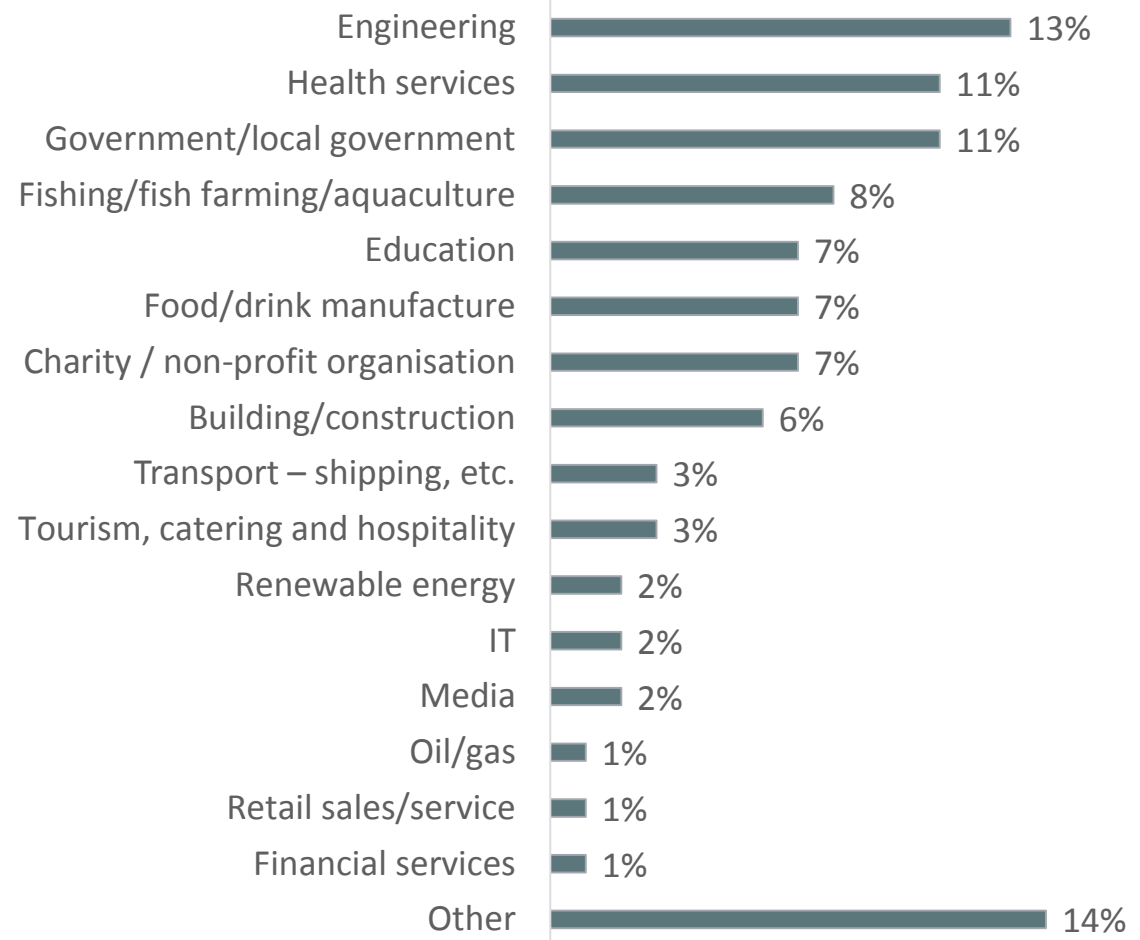
Base (All Calibration Business): 384

Visitor profile

Business

- A wide range of business sectors were cited by Business visitors. The most prevalent were engineering, health services and local government.
- Examples of other individual business sectors mentioned were photography, aviation, sales and veterinary.

Business sector




Base (All Online Business): 99

Visitor profile

Summary



- Just over two thirds of visitors to the Outer Hebrides in 2017 were visiting for leisure purposes, while 12% were visiting friends and relatives and 19% were on a work/business trip.
- The profile of all visitors was skewed to males (58%) and those aged 45 years or older (64%).
- A high proportion of Business visitors were male (77%), compared to Leisure (54%) and VFR (49%) visitors.
- The majority of visitors (82%) come from the UK – with 55% from Scotland and 28% from the rest of the UK.
- Amongst Leisure visitors, 76% were from the UK (43% Scotland; 33% rest of UK). Overseas Leisure visitors were predominantly from Europe (16%), with some also visiting from North America (6%).
- Just over half of Leisure visitors (53%) were visiting the Outer Hebrides for the first time.
- VFR (94%) and Business visitors (82%) were more likely to be repeat visitors to the islands.



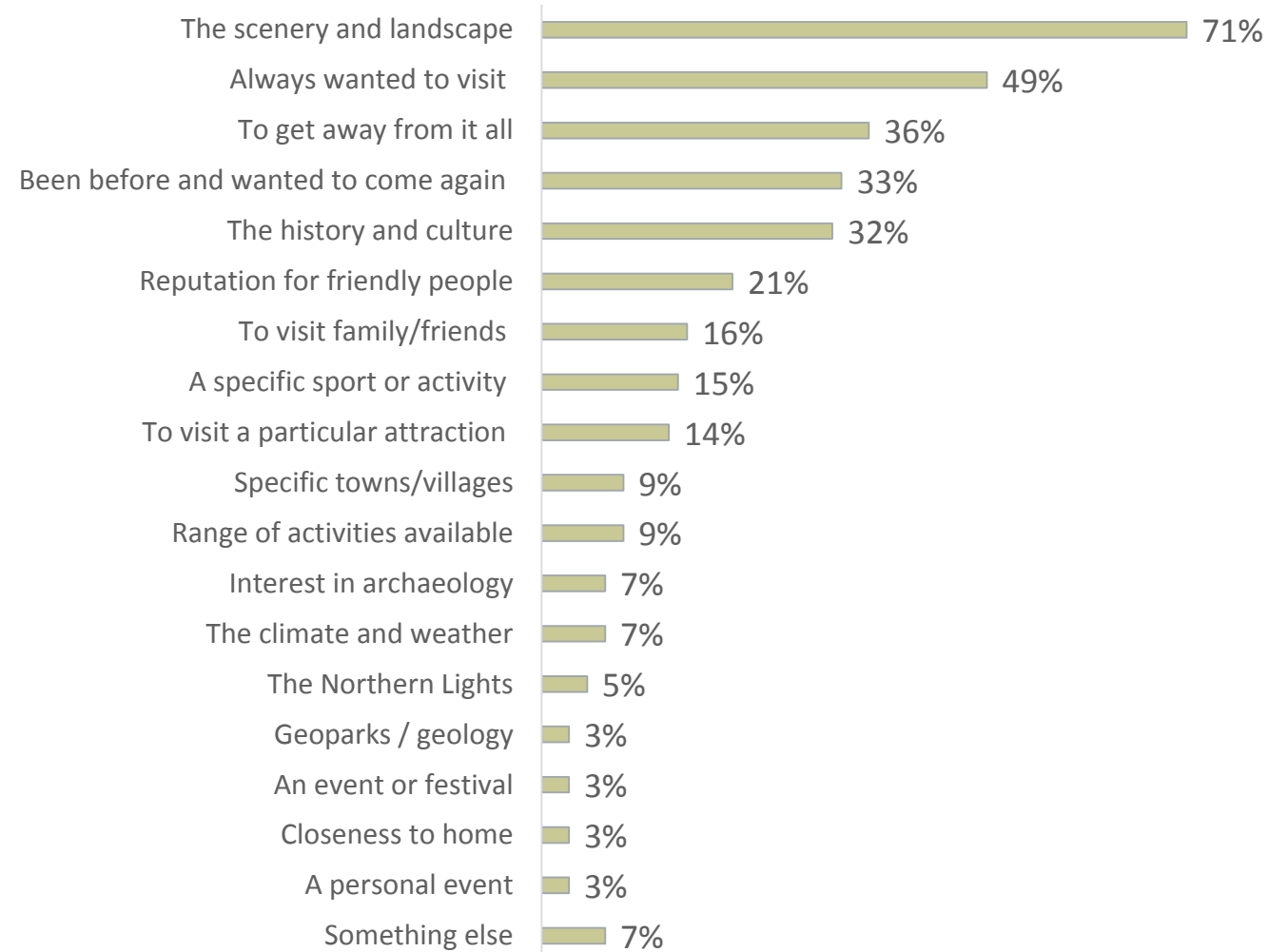
Visitor Journey

Visitor journey

Motivations

- The key reason for visiting the Outer Hebrides cited by Leisure visitors was the scenery and landscape (71%).
- Around a half had always wanted to visit (49%) and around a third (36%) said their main reason was to get away from it all.
- Males were most likely to select to participate in a sport (20%) than females (10%).
- Getting away from it all and the scenery were more likely to be mentioned by younger respondents than older respondents.

Reasons for visiting the Outer Hebrides - Leisure visitors



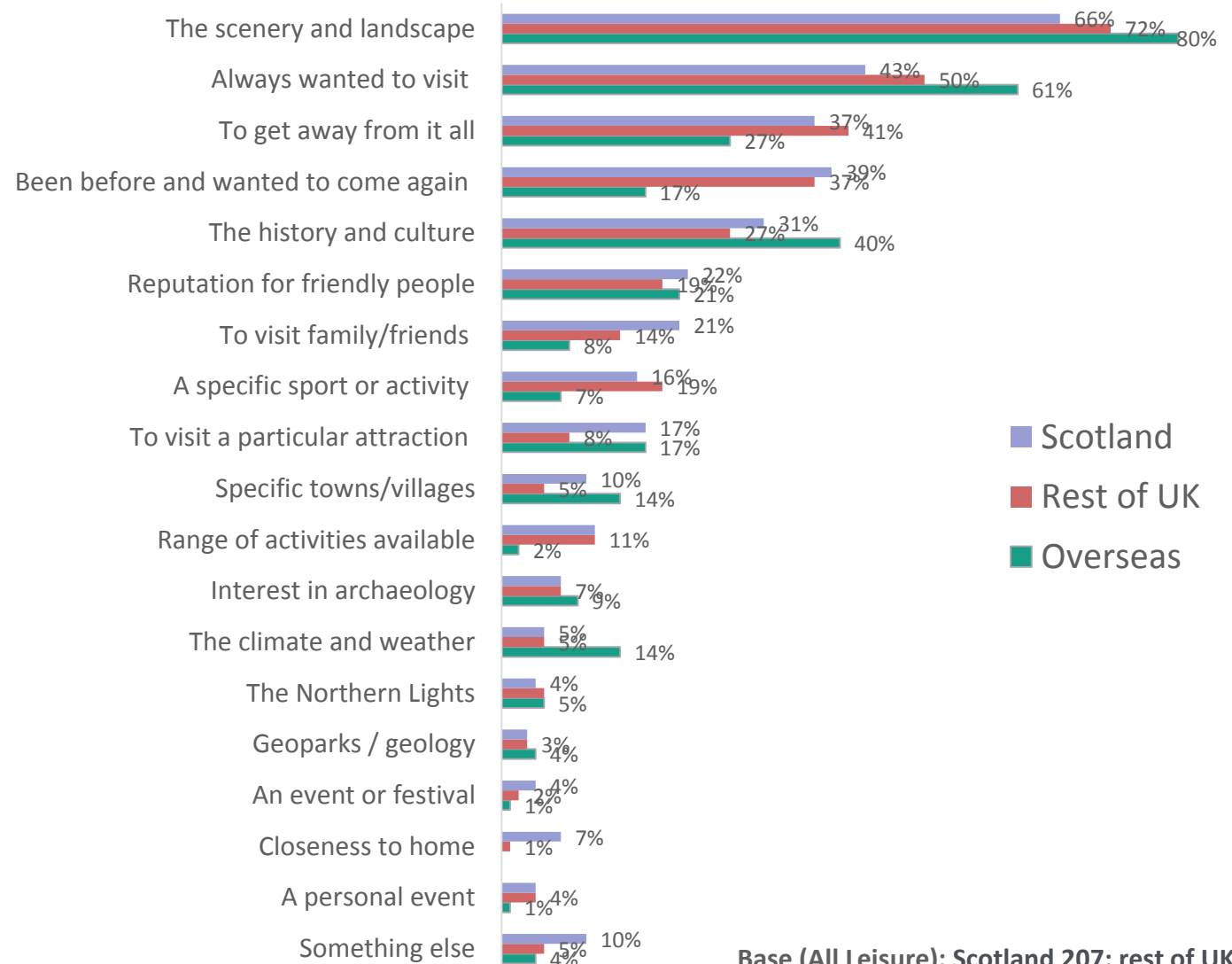
Base (All Leisure): 525

Visitor journey

Motivations

- Getting away from it all was more often mentioned by visitors from Scotland (37%) and the rest of UK (41%) than those from Europe (29%) or North America (18%). This suggests that getting away from it all is not a motivation for long haul travellers.
- North Americans (59%) were the most likely to mention the history and culture as a main reason for visiting the Outer Hebrides. Those from Scotland (39%) and the rest of the UK (37%) were more likely to have been before and wanted to visit again than those from overseas (17%).

Reasons for visiting the Outer Hebrides Leisure visitors - By Origin



Base (All Leisure): Scotland 207; rest of UK 202; overseas 116

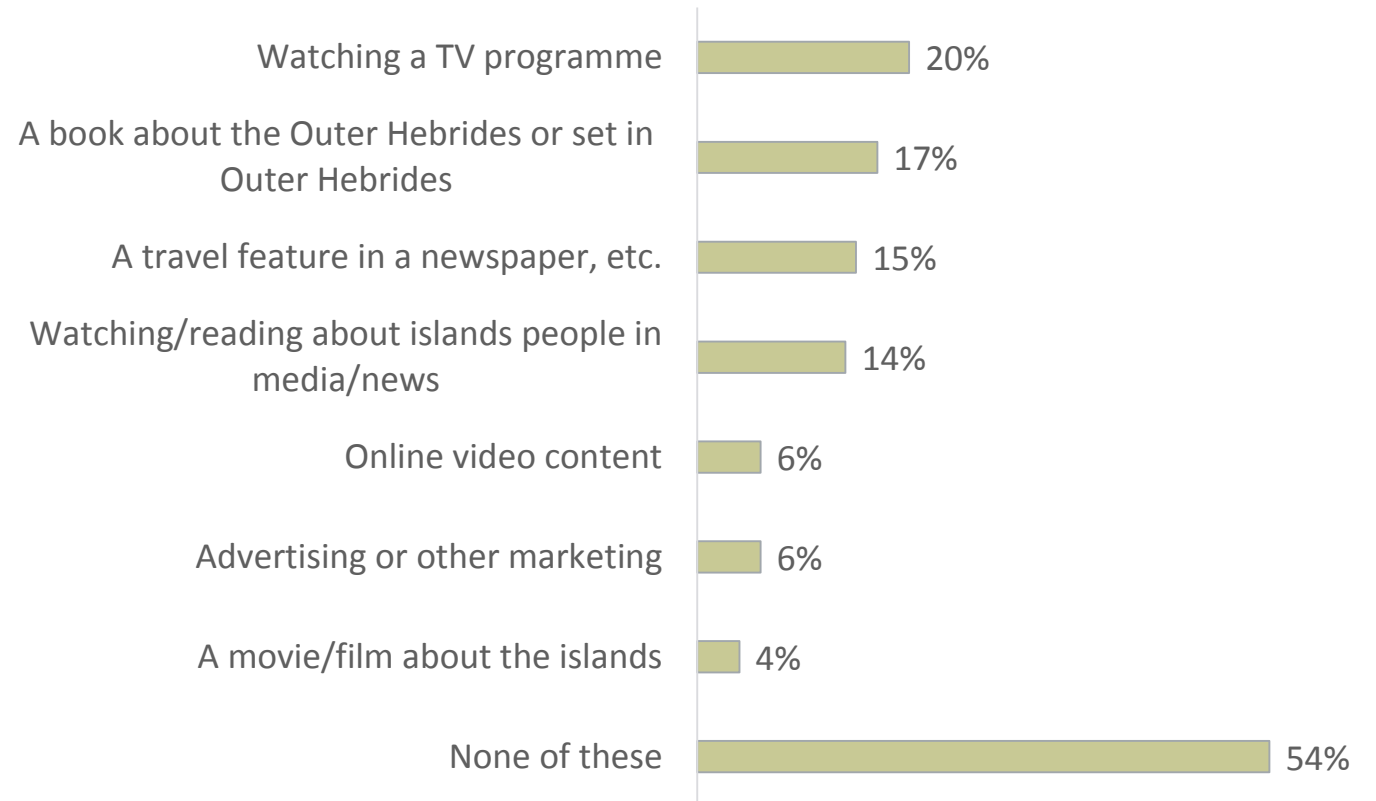
Q1: What were your main reasons for visiting the Outer Hebrides for your recent trip?

Visitor journey

Inspiration

- Overall 46% of Leisure visitors reported that they had been inspired to visit the Outer Hebrides by something they had seen or read.
- TV programmes were mentioned by 20% of respondents. These included Paul Murton: Grand Tours of the Scottish Islands, Monty Hall's Hebridean Adventure and Robson Green: Tales from the Coast.
- Books about the Outer Hebrides were reported to have inspired 17% of Leisure visitors. These included the Lewis Trilogy, Coffin Road and Hebrides all by Peter May.

Inspiration for visiting the Outer Hebrides - Leisure visitors

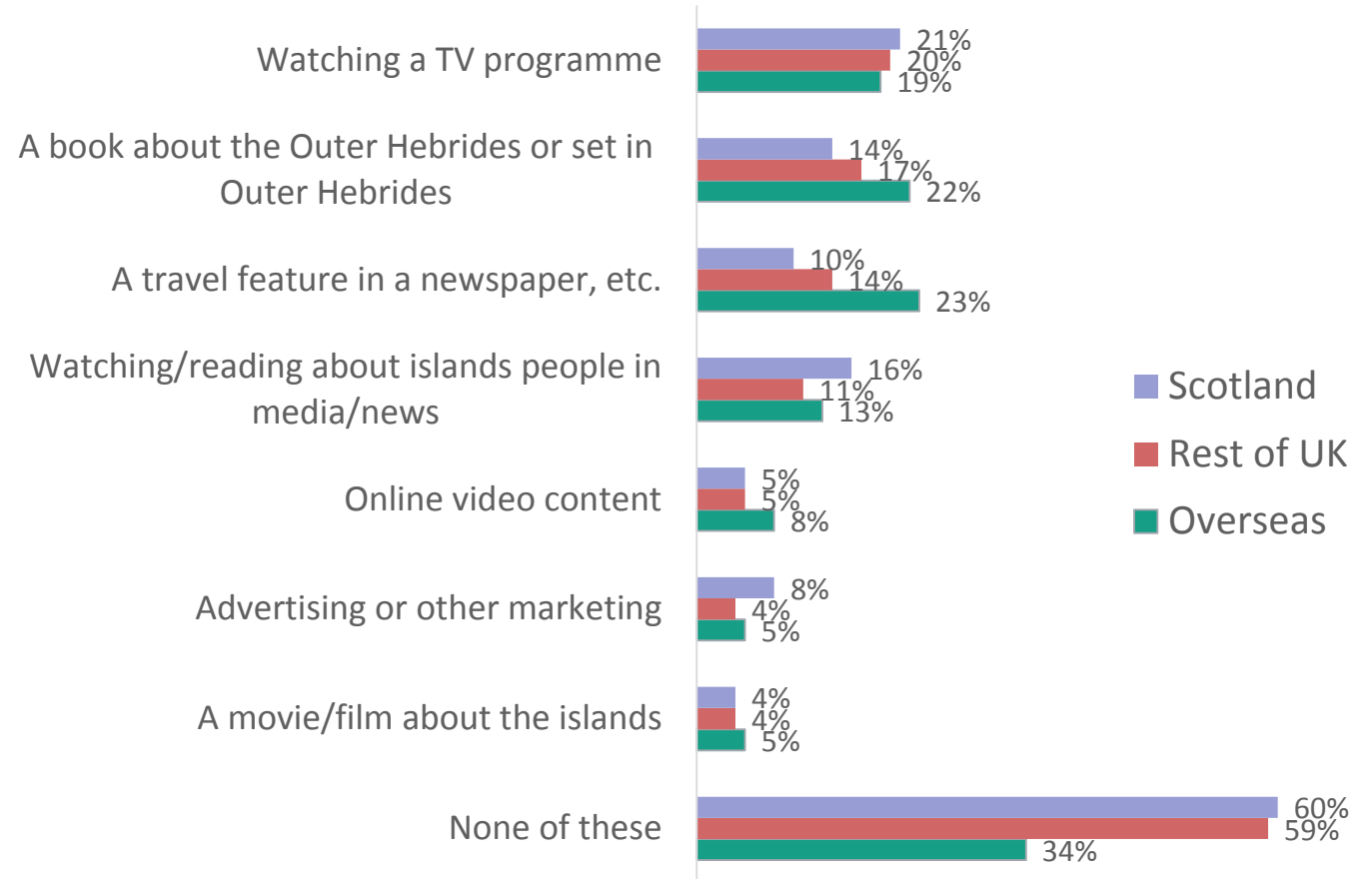


Visitor journey

Inspiration

- Overseas visitors were more likely to be inspired in general by books, films, TV, etc. (66%) than those from Scotland (40%) or the rest of UK (41%).
- Between one fifth and one quarter of overseas visitors mentioned being inspired by travel features, books and/or TV programmes.

Inspiration for visiting the Outer Hebrides Leisure visitors – By Origin



Base (All Leisure): Scotland 207; rest of UK 202; overseas 116

Qualitative Findings

Reasons for visiting Outer Hebrides



Many qual respondents also visited for the scenery, particularly the stunning beaches. Word of mouth recommendations were also often mentioned.

We wanted to visit somewhere quiet and peaceful and the whole idea of getting there and on the ferry seemed like an adventure in itself.

I had also seen photos of Luskentyre beach in the Guardian and thought it looked amazing.

Family gathering because we are getting married!

We chose the OH specifically as this was where my friend had been and said the beaches were wonderful – And they were!

I was recommended it from a friend. I heard all about the beach landing so that was the main reason for going.

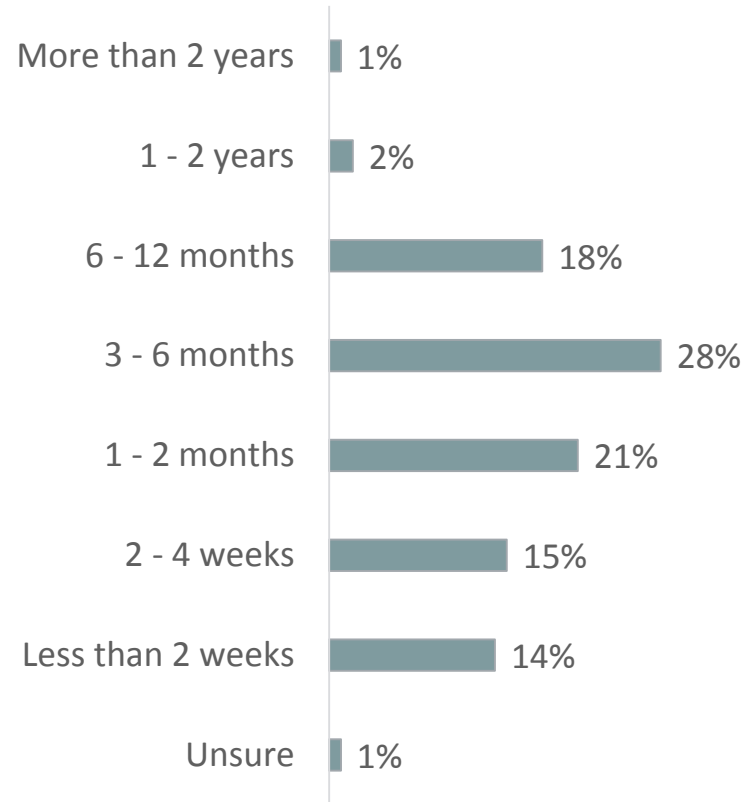
Always like visiting the islands. The people and culture are very interesting because they are so far North. I was also at an art show where a man was making chessmen of Lewis so peaked my interest.

Visitor journey

Planning

- Across the total sample of all visitors the majority (78%) planned their visit to the Outer Hebrides within 6 months of travel.
- Just under a third (29%) of visitors planned their visit within one month of travel, suggesting that many people visited based on a fairly last minute decision.
- However, the level of advance planning varied by visitor type, with Leisure visitors the most likely to plan a long time in advance and Business visitors the most likely to make plans close to their date of departure. Full details of planning by each visitor group are shown over.

How far in advance did you plan your trip?



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

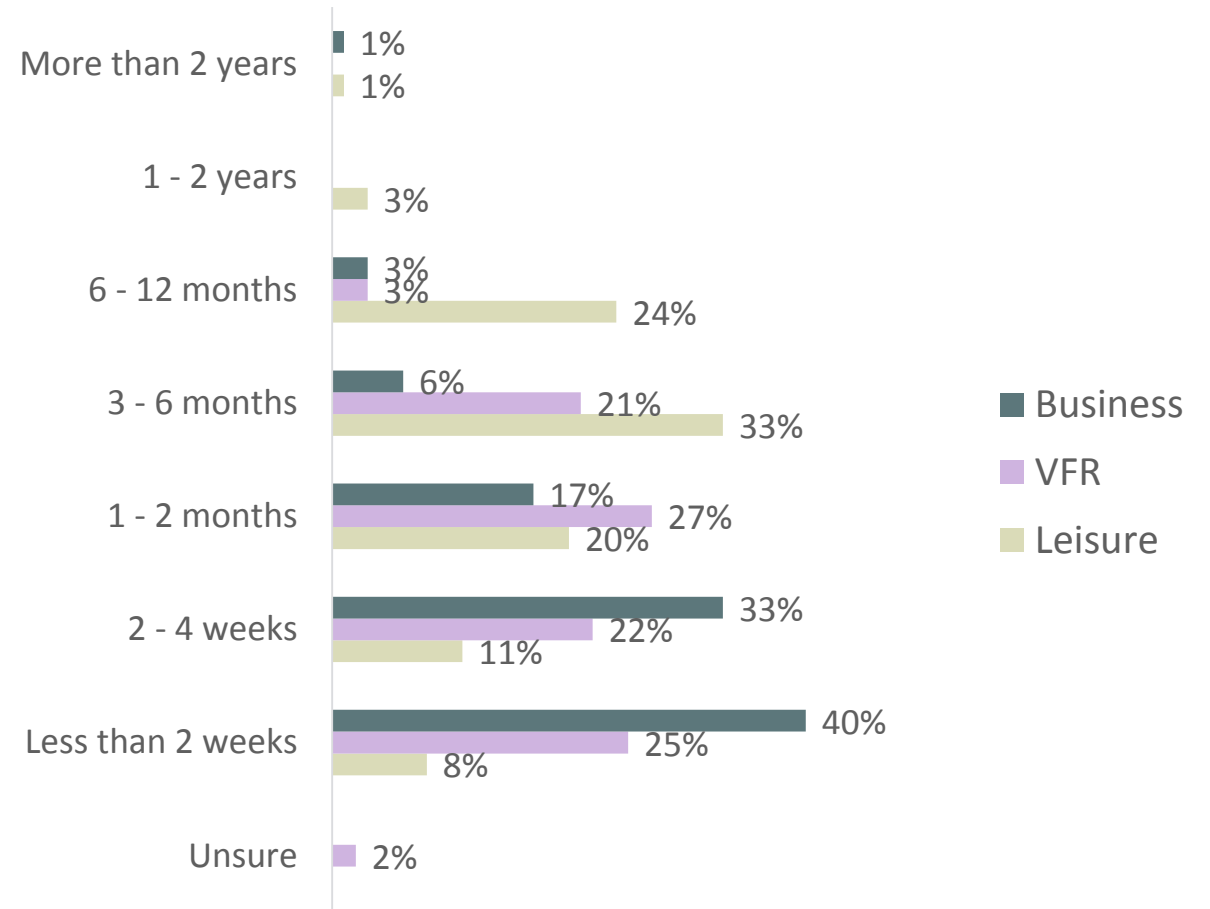
Base (All except rotational shift workers): 648

Visitor journey

Planning

- Leisure visitors showed the highest levels of advance planning – 28% planned more than 6 months before their visit and 33% started their planning 3 to 6 months in advance.
 - Leisure visitors from Scotland were the most likely to start planning within two months of travel (52%) than those from the rest of UK (31%) or overseas (27%).
- By contrast VFR visitors were more likely to plan their visit less than 3 months before – 74% decided on their visit less than 3 months before.
- As we might expect, Business visitors had the lowest levels of advance planning. Indeed, 73% of Business visitors started planning their trip within one month of travel.

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



Base (All except rotational shift workers):
Leisure 525; VFR 60; Business 63

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

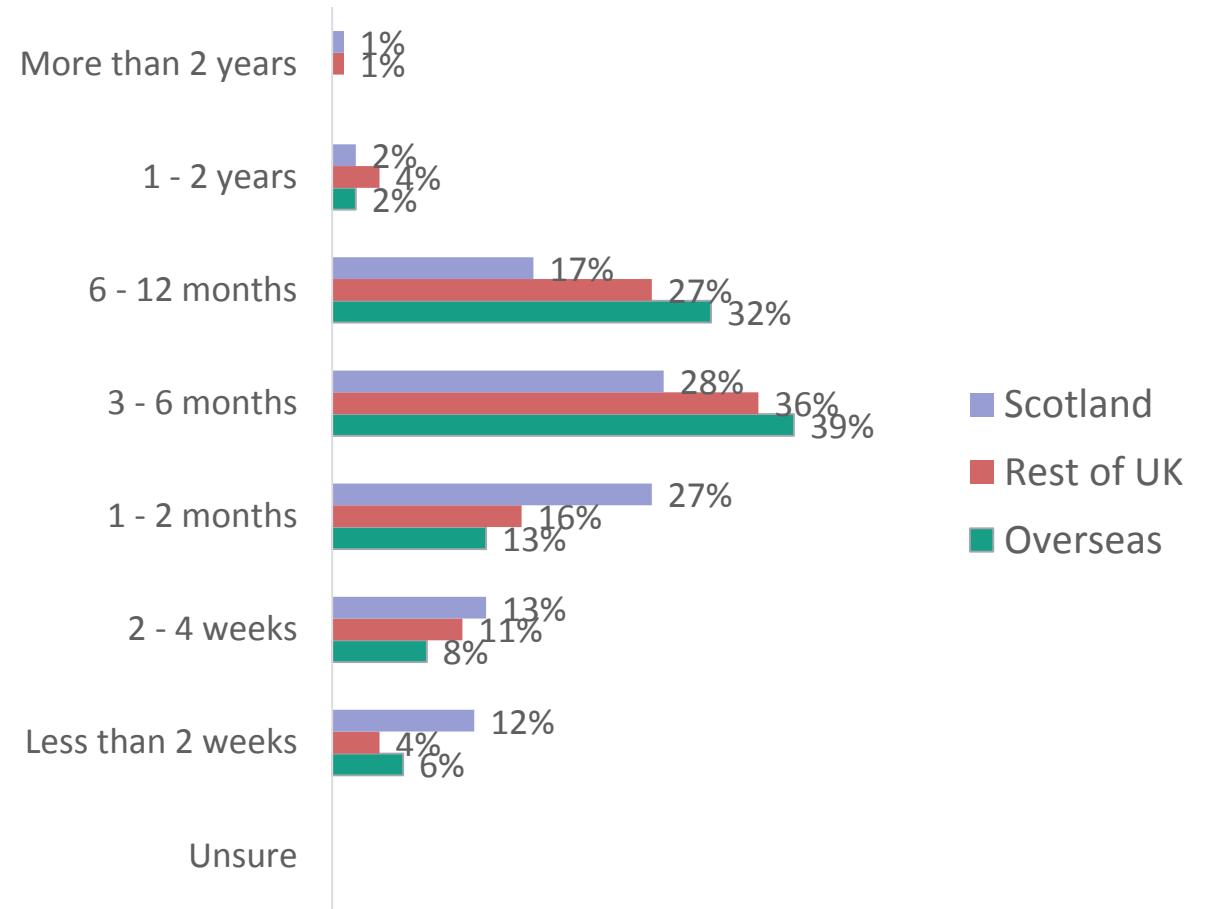
Visitor journey

Planning

- Leisure visitors from Scotland were the most likely to start planning within a month of travel (25%). Visitors from North America (44%) and other overseas (37%) were the most likely to plan more than 6 months in advance.



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



Base (All Leisure except rotational shift workers): Scotland 207; rest of UK 202; overseas 116

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

Visitor journey

Booking

- Patterns of data in terms of booking the trip are very similar to those for planning – the majority overall (83%) book within 6 months.
- However, although 21% planned their trip more than 6 months before travel, only 11% booked this far in advance, suggesting that some held off booking for some months. This may have been necessary if travel operators timetables were not available at the point of planning.
- Again, differences were noted between the three visitor sub-groups, as noted over.

How far in advance did you book your trip?

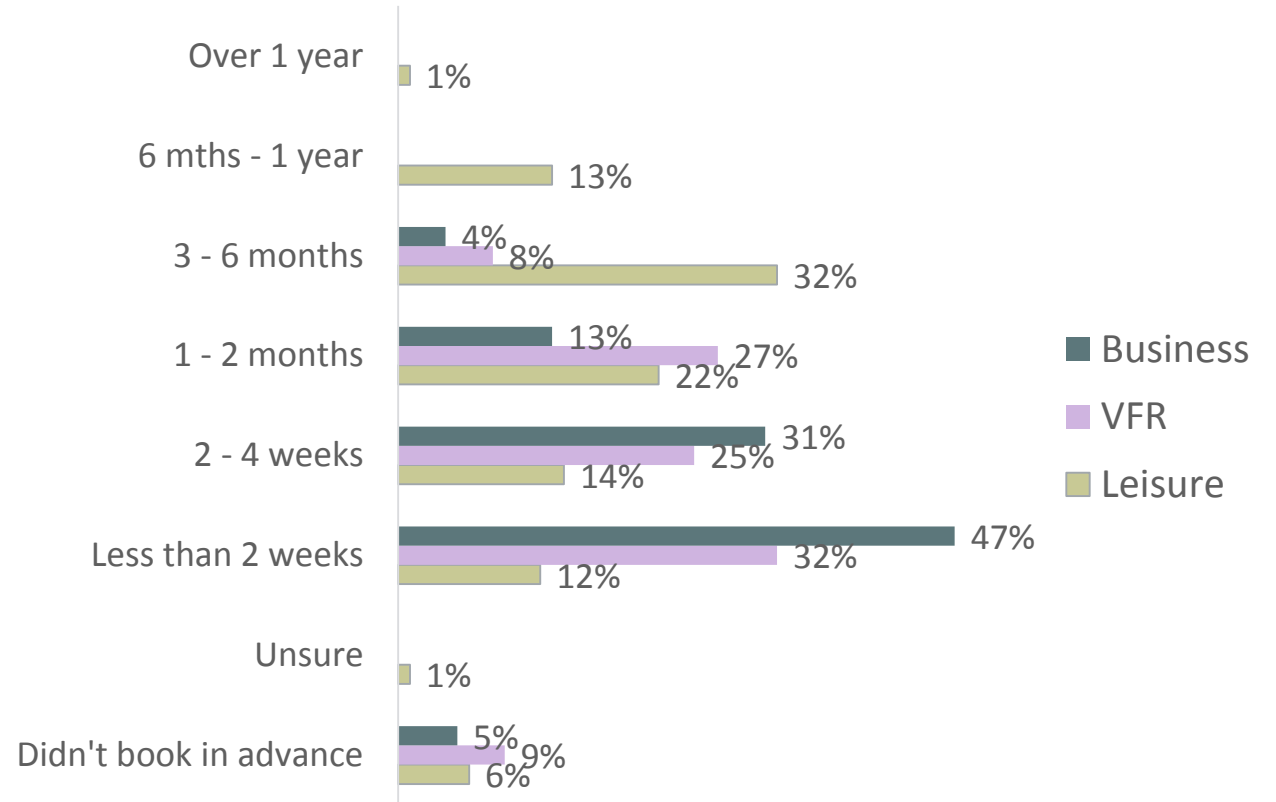


Visitor journey

Booking

- Mirroring the pattern of response for planning, Leisure visitors were the most likely to book their trip to the Outer Hebrides some time in advance of travel – 46% booked more than 3 months before visiting.
 - Visitors from Scotland were the more likely to book within two months of travel (55%) than rest of UK (43%) and overseas (41%) visitors.
- Business and VFR visitors were more likely to book within one month of travel – 79% of Business visitors and 57% of VFR visitors.

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



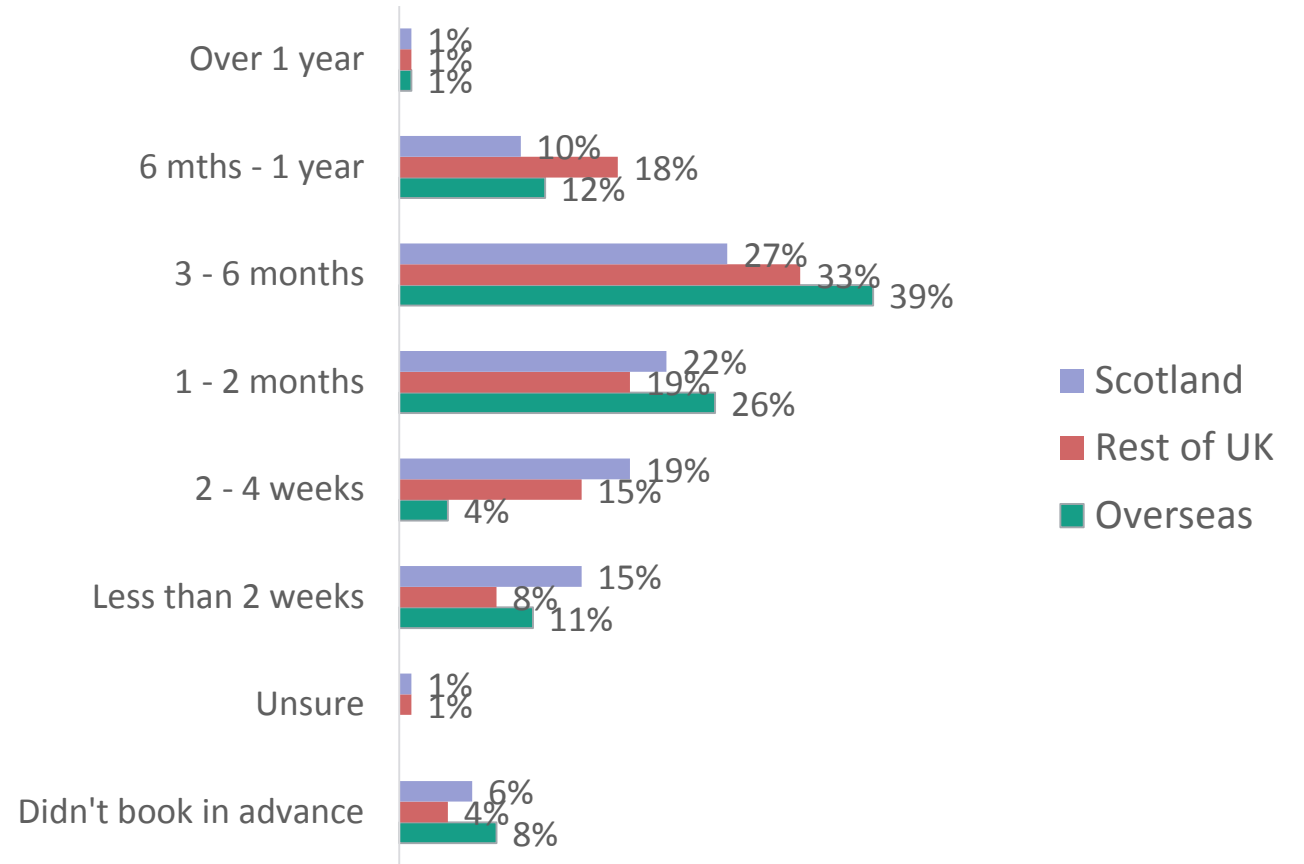
Base (All except rotational shift workers):
Leisure 525; VFR 60; Business 63

Visitor journey

Booking

- Visitors from Scotland were the more likely to book within a month of travel (34%) than those from the rest of the UK (23%) or overseas (15%).
- For visitors from the rest of the UK and overseas the typical timing of booking is 3 to 6 months before the trip (rest of UK 33%; overseas 39%).

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



Base (All Leisure except rotational shift workers):
Scotland 207; rest of UK 202; overseas 116

Visitor journey

Sources of information

- Websites were the key source of information for Leisure visitors when planning their trip. Word of mouth is also critical, with 43% citing family and friends.
- Printed travel guide books were mentioned by over one fifth of Leisure visitors, while travel providers are also important – 17% cited calls to travel providers.
- Social media was mentioned by 10% of visitors, while 3% mentioned apps, including VisitScotland, Calmac, Tripadvisor, Booking.com and the Outer Hebrides Travel App.
- Younger age groups were more likely to use social media than older respondents (20% of 16 to 34s).

Sources of information during planning - Leisure visitors



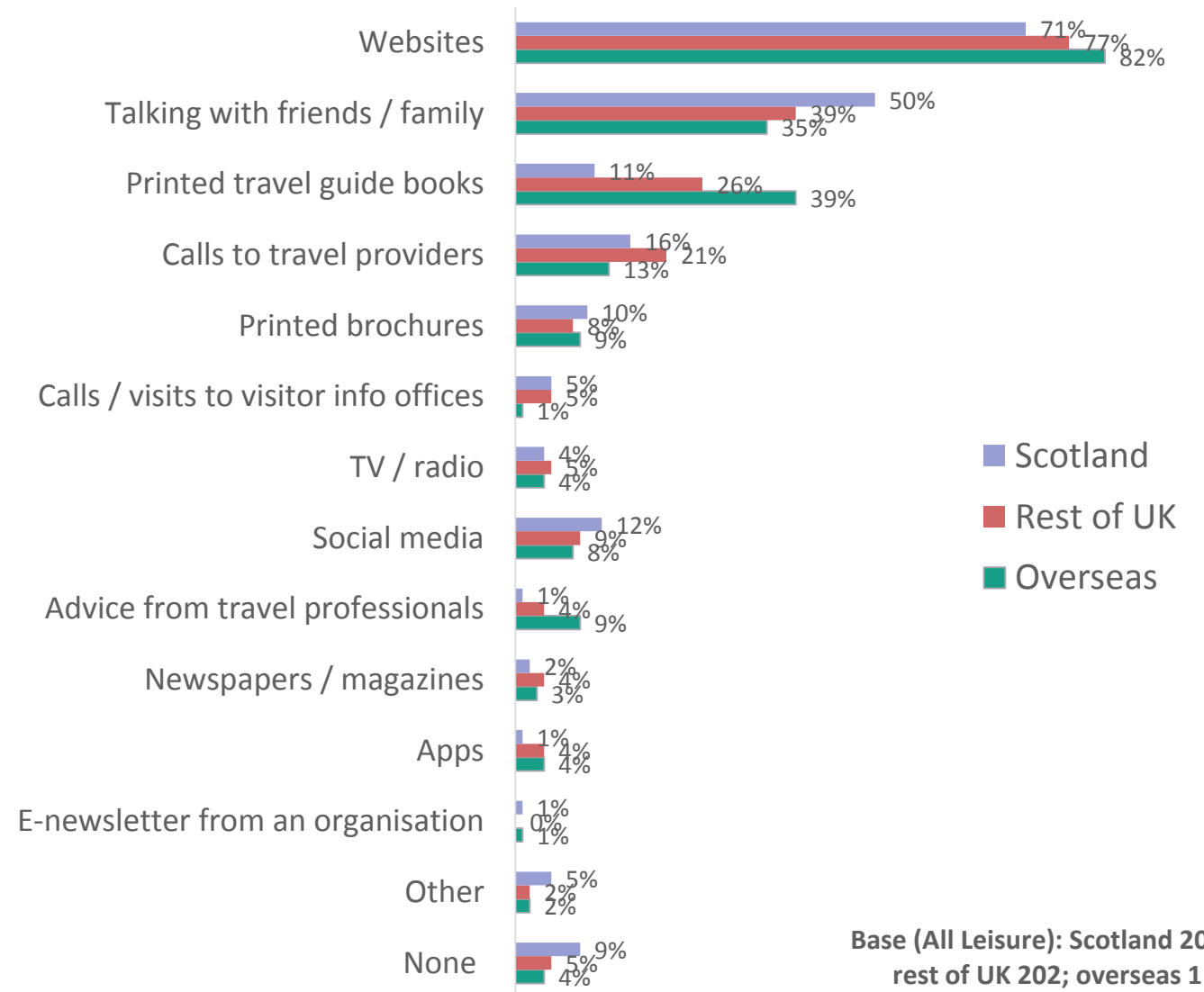
Visitor journey

Sources of information

- There were some interesting variations in sources of information used by Leisure visitors when the data was analysed by visitor origin.
- Overseas Leisure visitors were more likely to use printed travel books (39%) than those from Scotland (11%) or the rest of the UK (26%).
- Overseas visitors were also more likely to take advice from travel professionals (9%) than those from Scotland (1%) or the rest of the UK (4%).
- Overseas visitors (82%) and rest of UK visitors (77%) were more likely to use websites than visitors from Scotland (71%).
- Visitors from Scotland were the most likely to talk to friends and family (50%; Rest of UK 39%; overseas 35%).



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



Base (All Leisure): Scotland 207; rest of UK 202; overseas 116

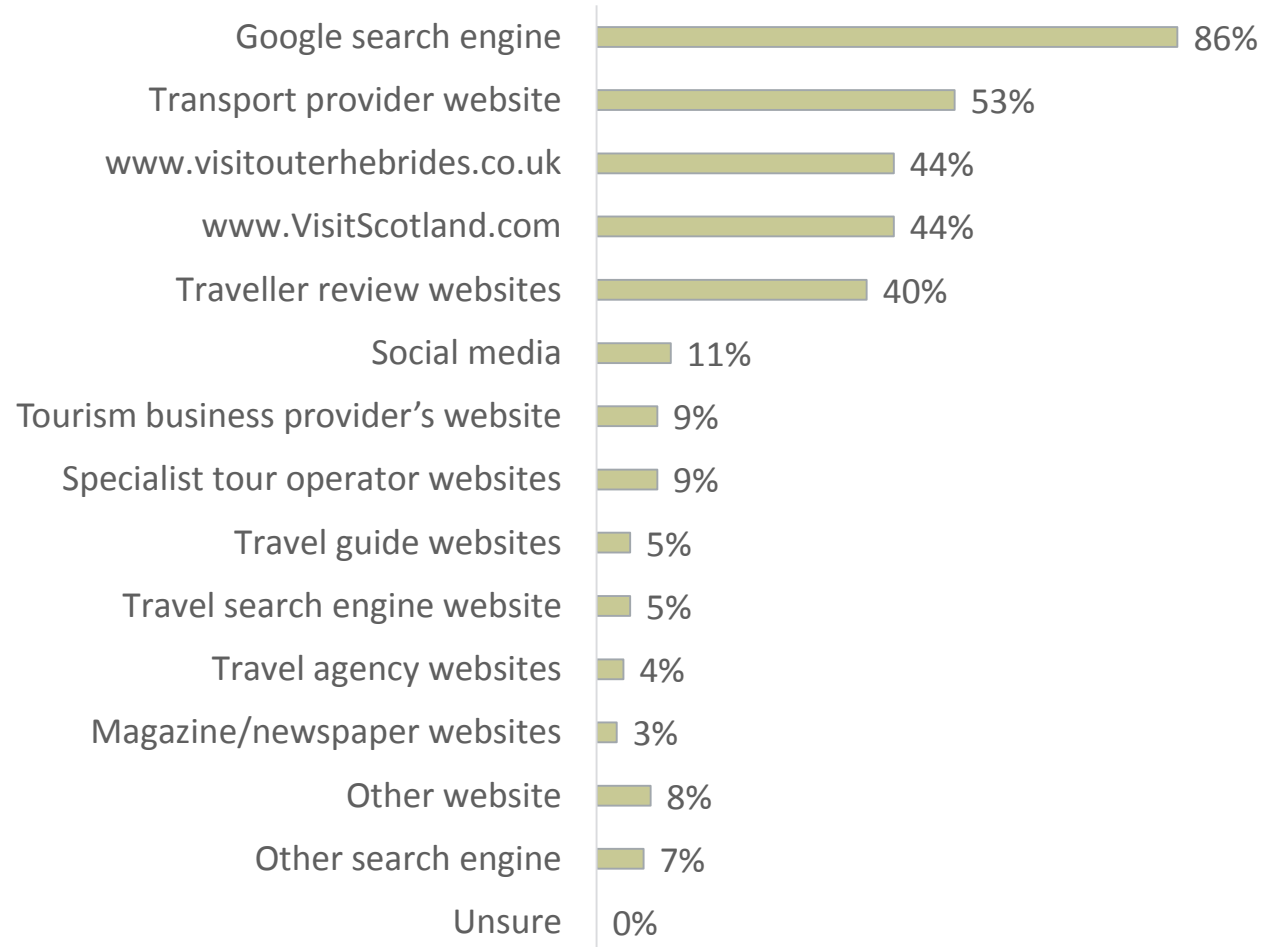
Q6: Which of the following sources of information did you use when planning your visit to Orkney?

Visitor journey

Sources of information

- Leisure visitors who had sought information online were asked which websites or search engines they had used. The majority of these visitors (86%) reported using the Google search engine as a starting point.
- The two key tourism websites cited were Visitouterhebrides.co.uk (44%) and VisitScotland.com (44%).
- Just over half also reported using transport providers' websites, whilst 40% looked at traveller review websites.
- Transport provider websites were more likely to be used by those from Scotland (61%) than those from the rest of the UK (46%).

Websites and search engines used - Leisure visitors



Base (Leisure who used online info): 398

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

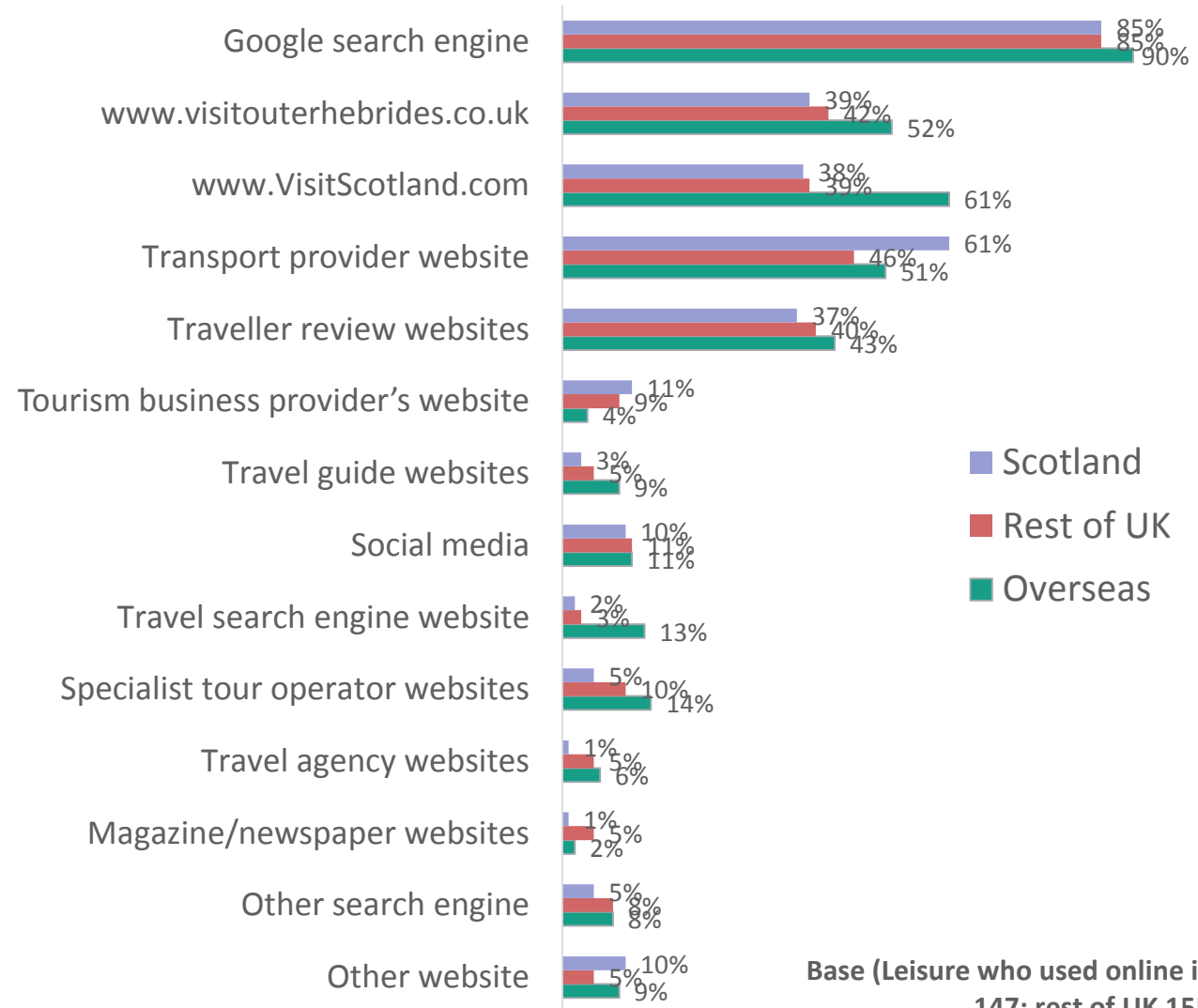
Visitor journey

Sources of information

- Overseas visitors tend to use a wider variety of websites than Scotland and rest of UK visitors.
- VisitScotland.com was more likely to be used by overseas visitors (61%) than Scotland (38%) or rest of UK visitors (39%).
- Traveller search engine websites were also more likely to be used by overseas visitors (13%) – especially Europeans (19%).
- A higher proportion of North Americans also used travel guide websites (21%), compared to Scotland (3%) and rest of UK (5%) and European (4%) visitors.



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



Base (Leisure who used online info): Scotland 147; rest of UK 155; overseas 96

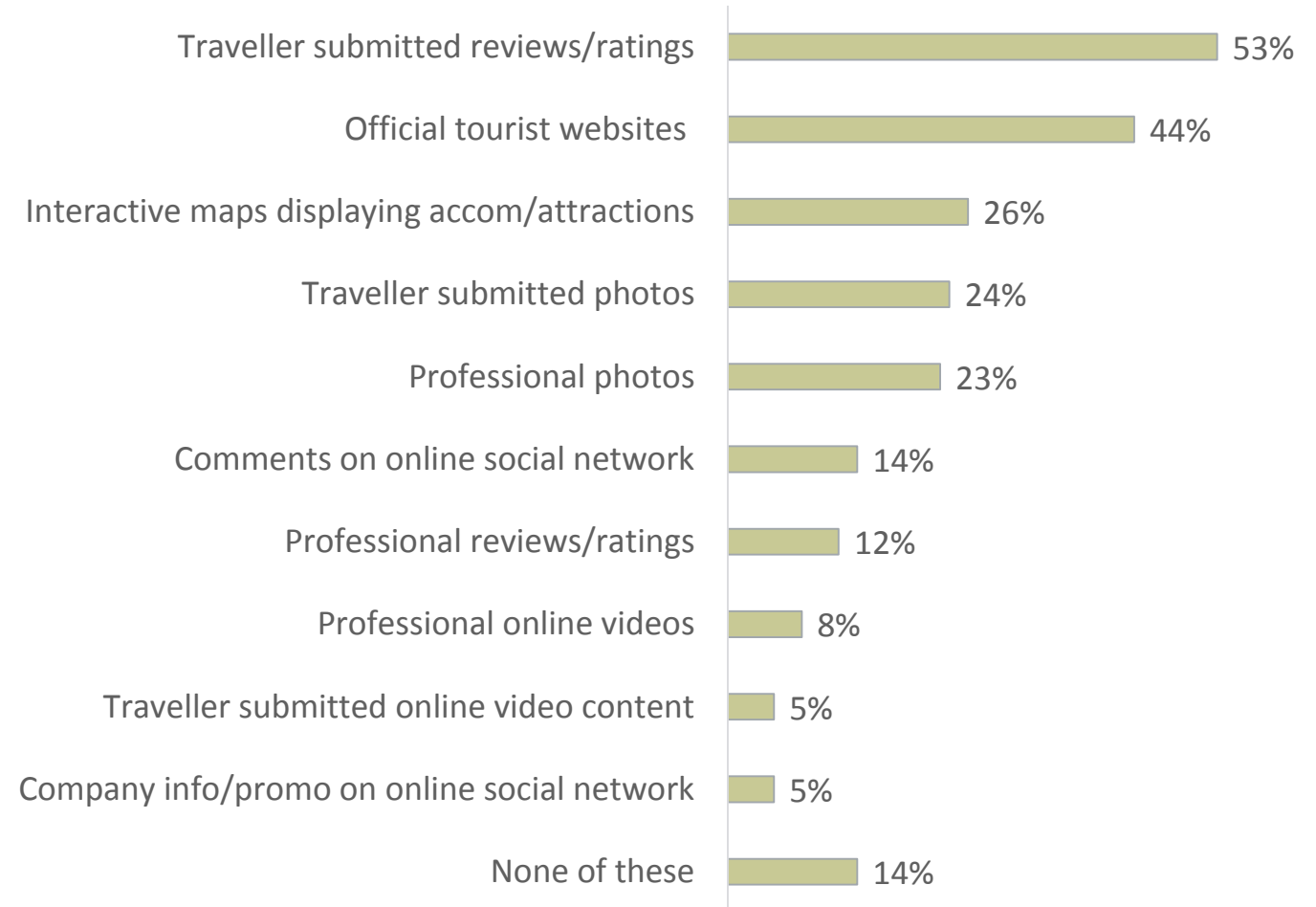
Q8: What types of websites or search engines did you use when planning your visit to Orkney? Please think only about information gathering during planning your trip rather than booking the trip.

Visitor journey

Sources of information

- Reflecting the high proportions visiting the VisitOuterHebrides and VisitScotland websites, many visitors (who had viewed online info) reported that they had looked at official tourist websites (44%).
- The importance of traveller reviews was also confirmed, with 53% reporting that they looked at these during the planning process. Almost a quarter of these respondents also reported looking at traveller submitted photos online.
- Visitors from the rest of UK (16%) and overseas (17%) were more likely to look at professional reviews than those from Scotland (6%).
- Around a quarter of people who used online sources also reported looking at professional photos or interactive maps.
 - A higher than average proportion of visitors from overseas (34%) mentioned interactive maps.

Online information used - Leisure visitors



Base (Leisure who used online info): 398

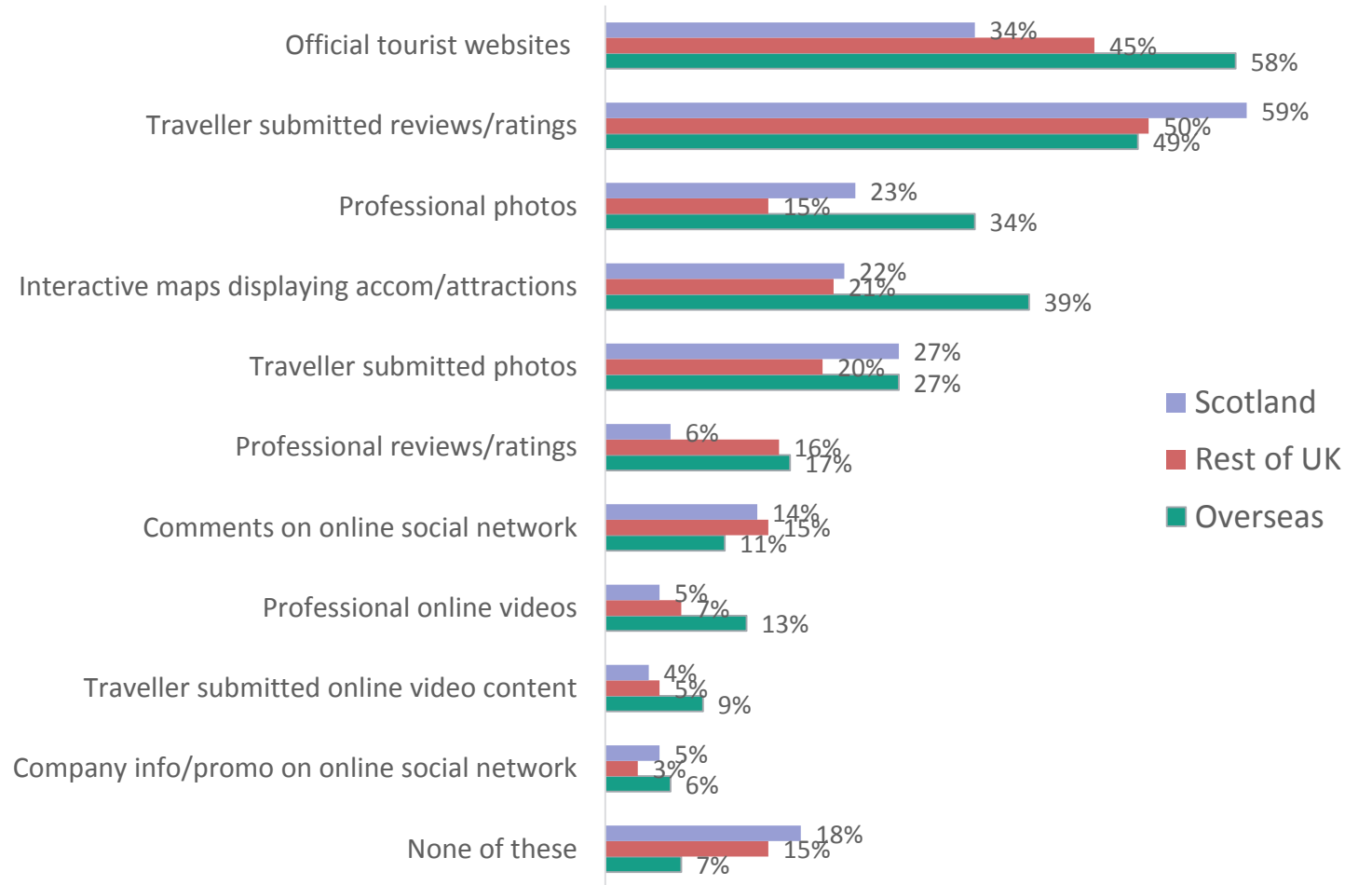
Q9: Which of the following types of online information did you use when planning your visit to Outer Hebrides?

Visitor journey

Sources of information

- Again, overseas visitors were more likely to use a wide range of online information than visitors from Scotland or the rest of the UK.
- For example, overseas visitors (58%) were more likely than those from the rest of the UK (45%) or Scotland (34%) to mention official tourist websites.
- Visitors from overseas (17%) and the rest of UK (16%) were also more likely to look at professional reviews than visitors from Scotland (6%).
- Visitors from overseas were also more likely to mention using interactive maps (39%) and professional photos (34%) than visitors from elsewhere.

Online information used - by market (Leisure only)



Base (Leisure who used online info): Scotland 147; rest of UK 155; overseas 96

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

Qualitative Findings

Sources of information



Many qual respondents used review websites as well as VisitScotland and Visit Outer Hebrides websites

I used information from guidebooks but found very little on the Hebrides.

We looked at VisitScotland website and printed off points of interest.

TripAdvisor was great for reviews and we also used VisitScotland for recommendations.

I used Google images for inspiration and then tried calling as many places as I could direct as I don't like just booking online. I did use trip Advisor for reviews though.

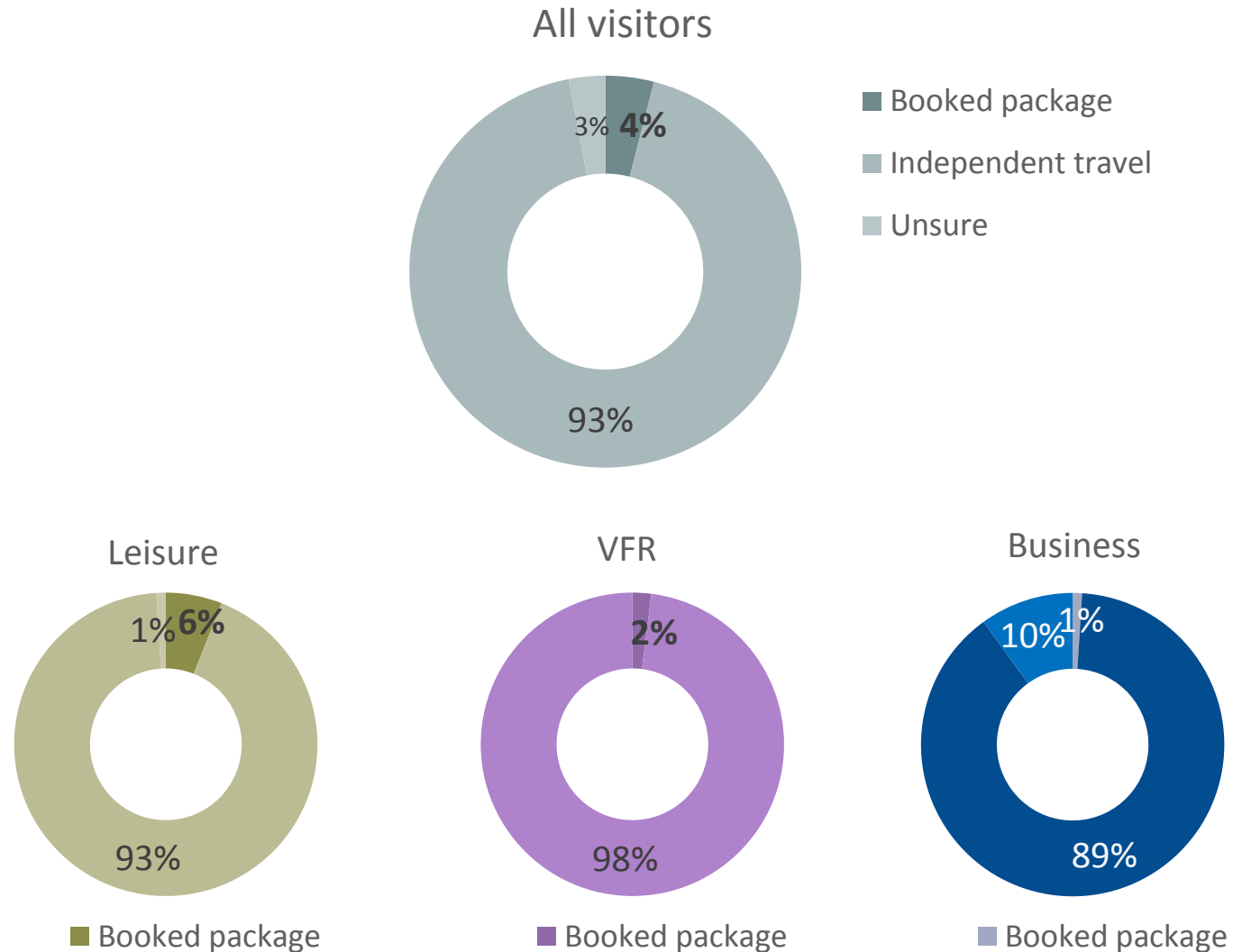
The Outer Hebrides website was really helpful. It had everything we needed on it.

Visitor journey

Booking

- Very few visitors to the Outer Hebrides in 2017 reported that they had booked their trip as a package – only 4% in total.
- Independent travel was prevalent across all visitor types. Proportions of package booking were particularly low for VFR (2%) and Business (1%) visitors, however, Leisure visitors were also predominantly independent travellers (93%).
- Overseas (9%) and rest of UK Leisure visitors (8%) were more likely to book a package than those from Scotland (1%).

Did you book a package?

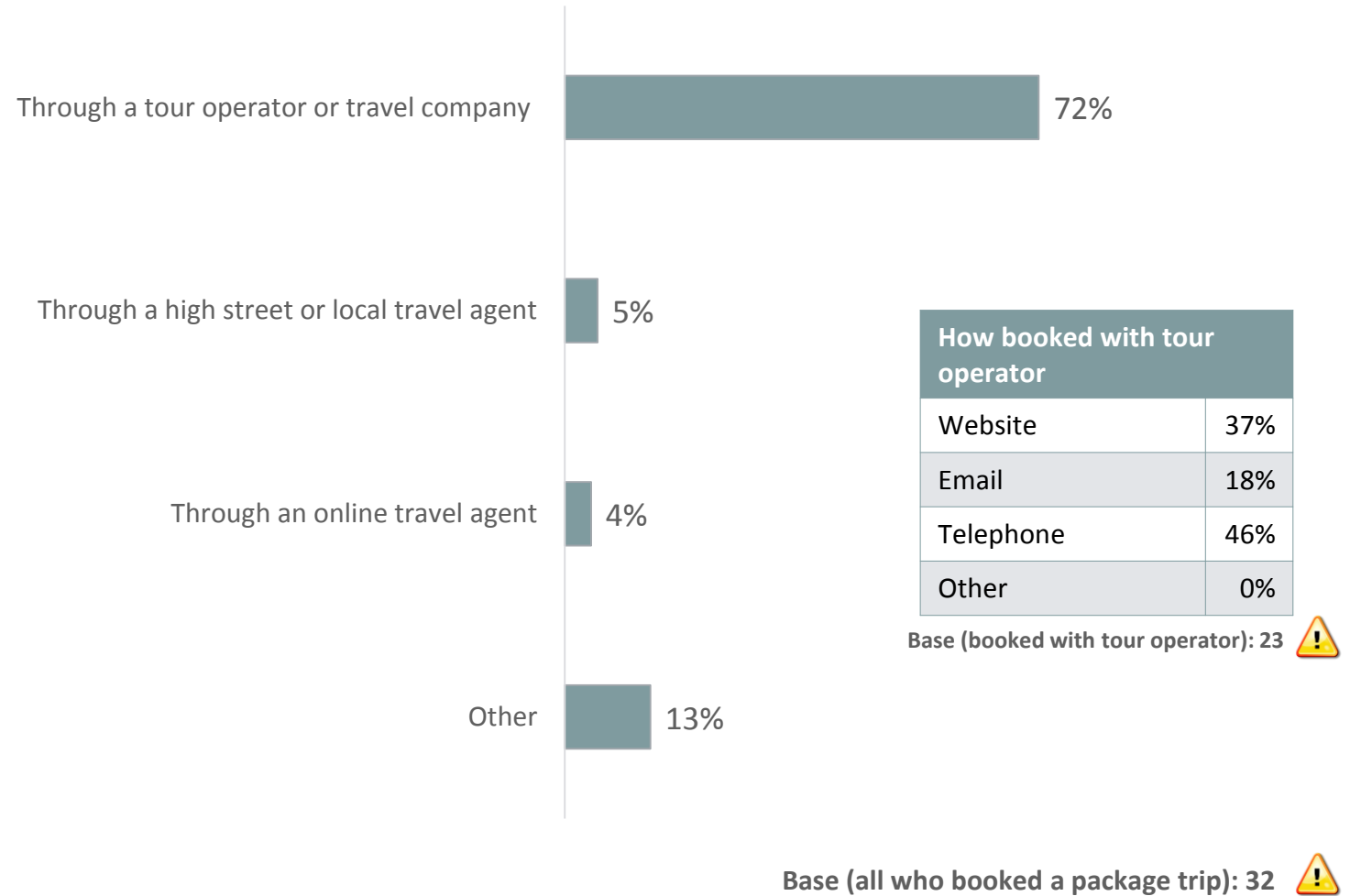


Visitor journey

Booking

- Only 4% of visitors reported booking their trip as a package.
- Of these, the majority (72%) booked this through a tour operator or travel company.
- Most commonly the booking was made by calling the tour operator or visiting its website.

Method of booking package



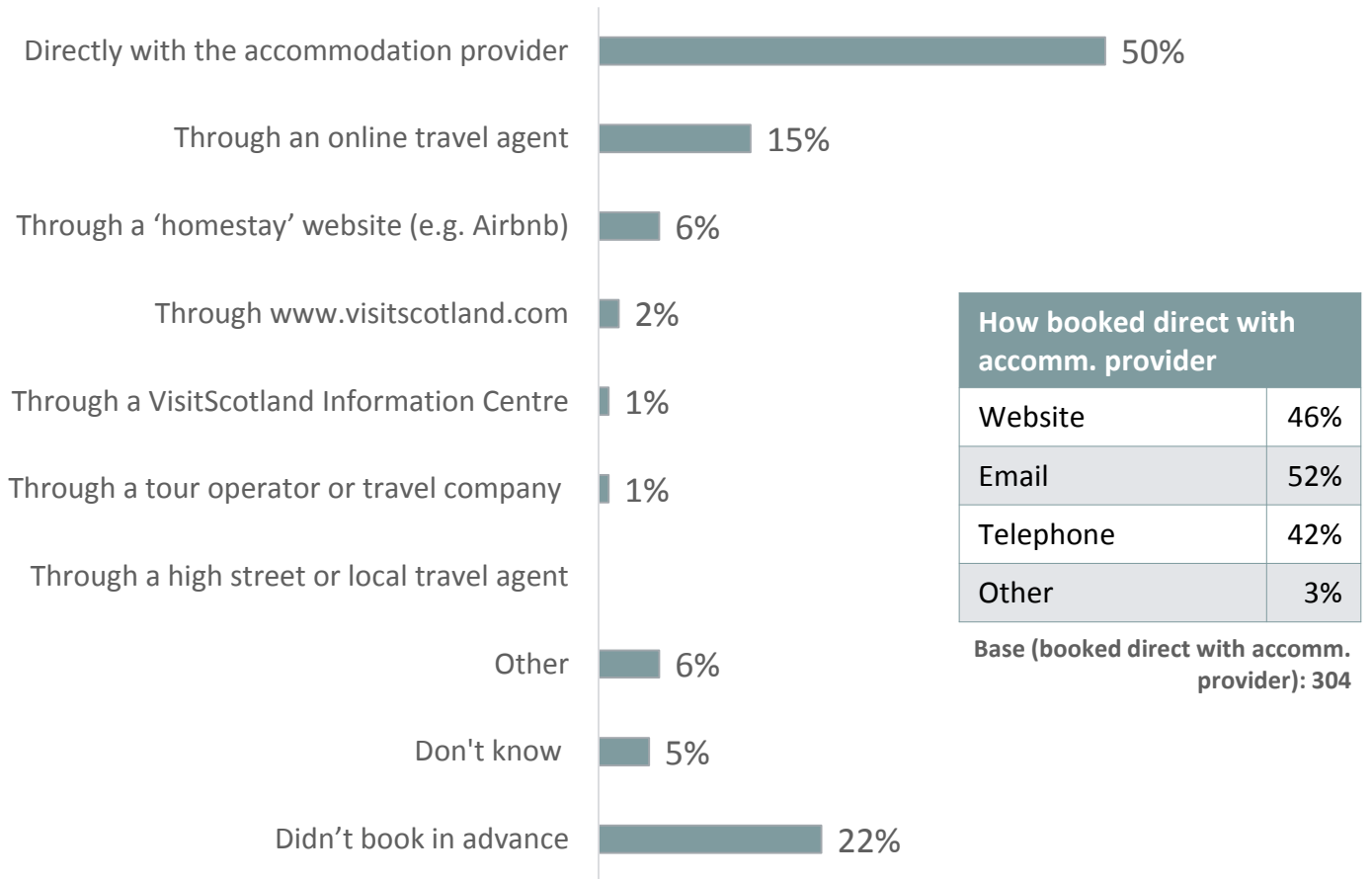
Q37: How did you book your package to the Outer Hebrides for your recent trip?

Visitor journey

Booking

- For visitors who did not book a package, the most common way of booking accommodation was directly with the accommodation provider (50%).
- Such bookings tend to be made by sending an email directly to the accommodation provider (52%) However, significant proportions also reported booking it on the accommodation providers' website (46%) or by telephone (42%).
- Online travel agents were also mentioned by 15% of overnight visitors, while 6% reported using a 'homestay' website such as Airbnb.
- It is also interesting to note that 22% of visitors did not book their accommodation in advance. These respondents were more likely to be VFR visitors (57%) than Leisure (17%) or Business visitors (13%).
- Full data pertaining to methods of booking accommodation for Leisure visitors is detailed over.

Method of booking accommodation



Base (All who stayed in paid accommodation, excluding those who booked accomm. in a package trip): 584

Visitor journey

Booking

- Just under three fifths of Leisure visitors reported booking their accommodation directly with the provider, while one fifth booked via an online travel agent.
- ‘Homestay’ websites were mentioned by 8% of Leisure visitors. These were more likely to be mentioned by under 35 year olds (17%) than any other age group.
- Those from the rest of the UK were least likely to book through a homestay website (3%).

Method of booking accommodation - Leisure visitors



How booked direct with accomm. provider	
Website	49%
Email	54%
Telephone	42%
Other	2%

Base (Leisure booked direct with accomm. provider): 271

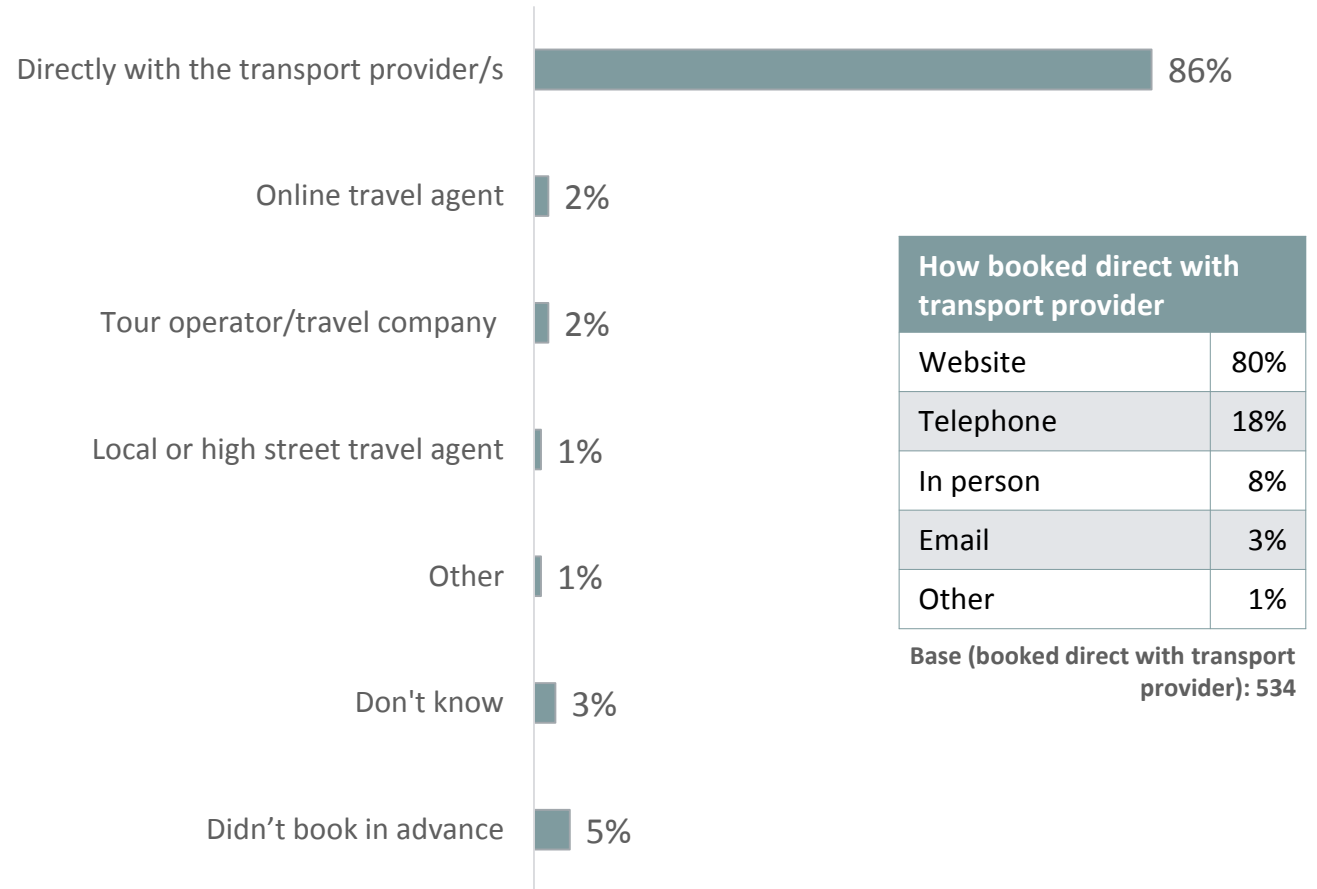
Base (Leisure staying in paid accommodation, excluding those who booked accomm. in a package trip): 480

Visitor journey

Booking

- For the vast majority of visitors who did not book a package, their transport to the Outer Hebrides was booked directly with the transport provider (86%).
- Almost all bookings with transport providers were done via the website, with only around one fifth by telephone and 8% in person.

Method of booking transport




Base (Excluding those who booked travel in a package trip): 613

Visitor journey

Summary



- The key reasons given for visiting the Outer Hebrides for Leisure visitors were the scenery, always wanted to and to get away from it all.
- Around a third also mentioned the history and culture as a draw. In addition, 46% of Leisure visitors also reported that something they had seen or read had also helped inspire their visit – for 20% this was a TV programme and for 17% it was a book.
- Online sources are key information sources for Leisure visitors during the planning and booking process. Visitors tend to use a combination of websites and search engines, most commonly Google, VisitOuterhebrides, VisitScotland and transport providers.
- Many (40%) also reported reading traveller reviews on websites such as TripAdvisor to inform planning and booking.
- The majority book their transport and accommodation independently directly with providers, rather than booking packages or using agents.
- Although 'homestay' accommodation accounts for a small proportion of all accommodation bookings, almost one sixth of Leisure under 35 year olds (who stayed in paid accommodation) booked their accommodation in this way.



Trip profile

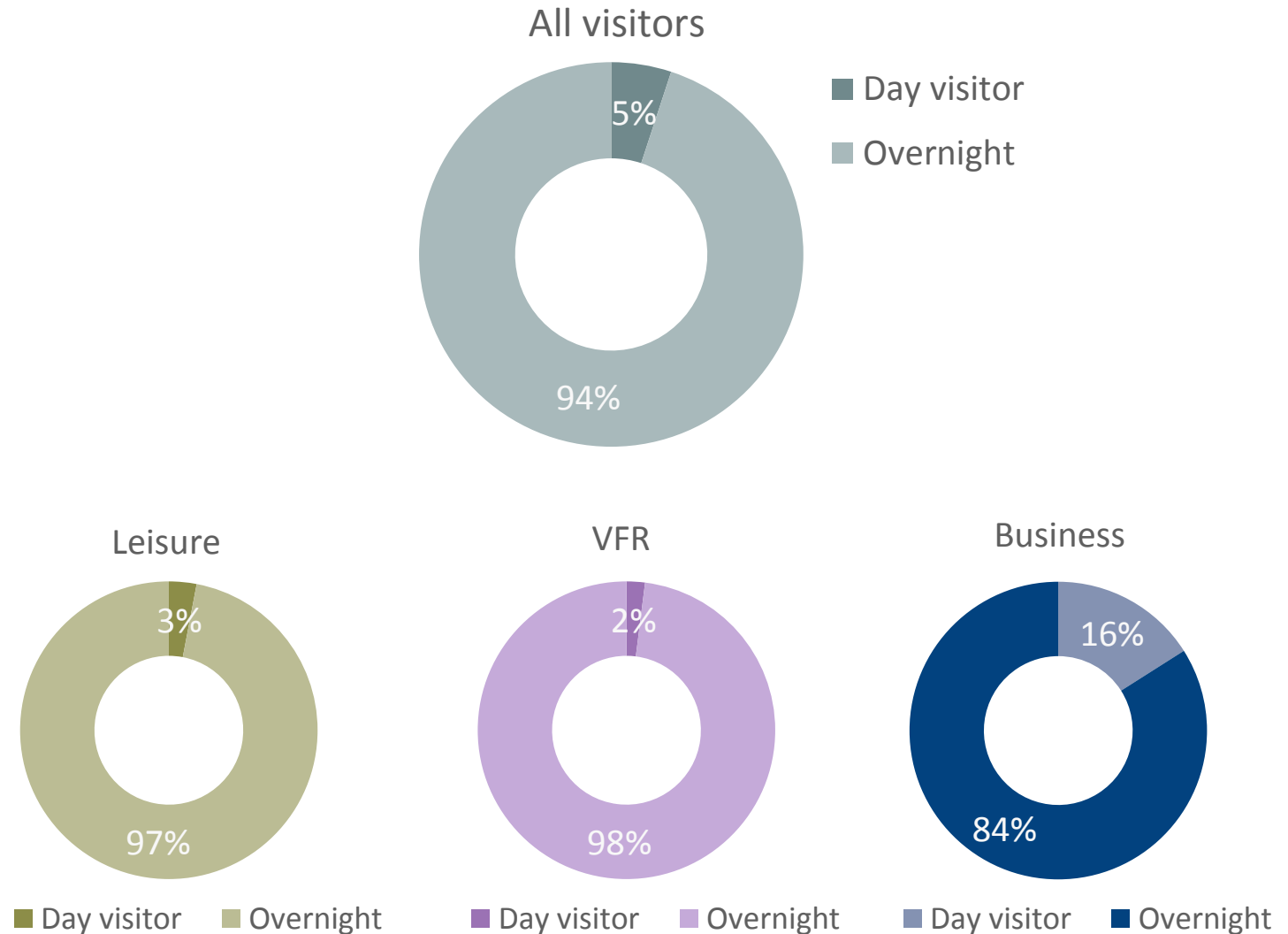
Trip Profile

Day vs overnight

- As expected, the majority of visitors to the Outer Hebrides were overnight visitors (94%).
- Amongst Business visitors 16% were day visitors.



Day visitor or staying overnight



Base (All calibration visitors): 2,228

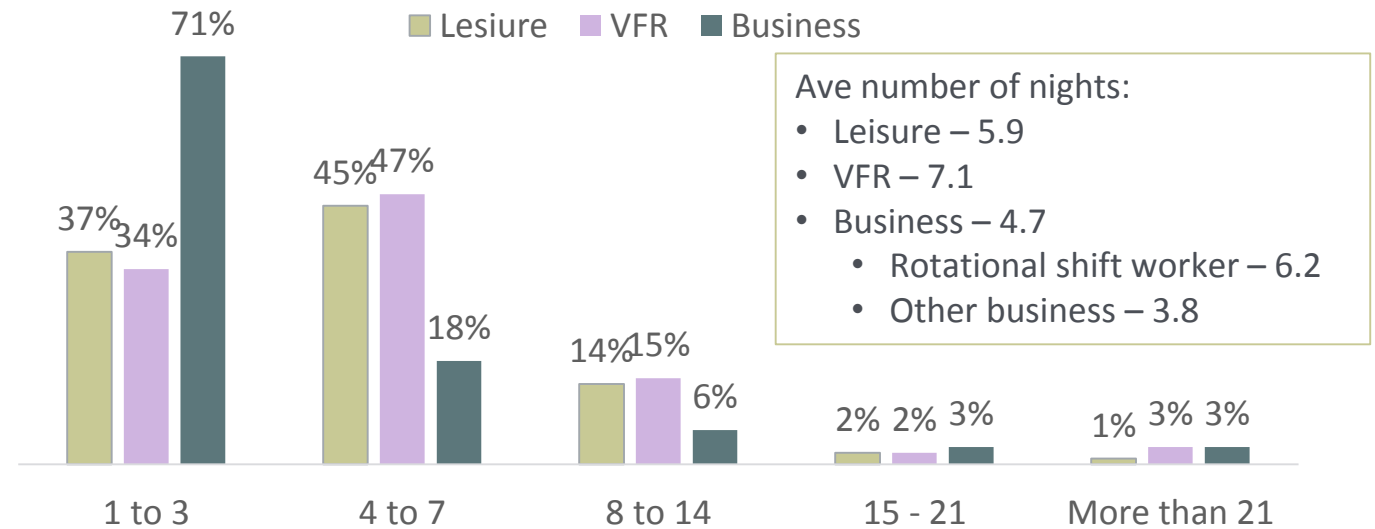
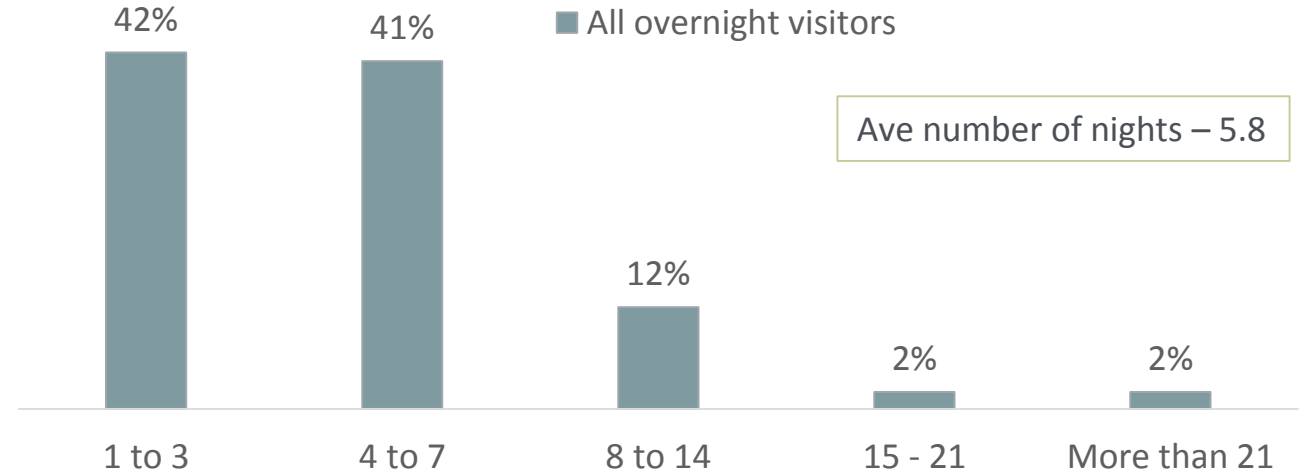
CQ3: Which of the following best describes your current visit to Outer Hebrides?

Trip profile

Number of nights

- The majority of overnight visitors to the Outer Hebrides (83%) stayed for a period of one week or less.
- Leisure visitors staying for a week or less were split, with 37% staying on a short break of 1 to 3 nights and 45% staying 4 to 7 nights. The average number of nights was around 6 nights.
 - Leisure visitors from overseas (60%) tended to spend 3 nights or less; while Scotland (52%) and rest of UK visitors (50%) tend to stay for 4 to 7 nights. A higher proportion of rest of UK Leisure visitors stayed for more than 7 nights (25%) compared to Scotland (15%) and overseas visitors (12%).
- VFR visitors tended to stay for a week or less, with more staying 4 to 7 nights (47%) than 1 to 3 nights (34%). The average number of nights was 7.1.
- Business overnight visitors predominantly stay for 3 nights or less (71%). The average number of nights was around 5. Rotational shifts worked had a higher average length of stay (6.2 nights) than other business visitors (3.8), although the majority did stay for 3 nights or less.
 - Rotational shift worker – 66% stayed 3 nights or less
 - Other business – 74% stayed 3 nights or less

Number of nights - Outer Hebrides



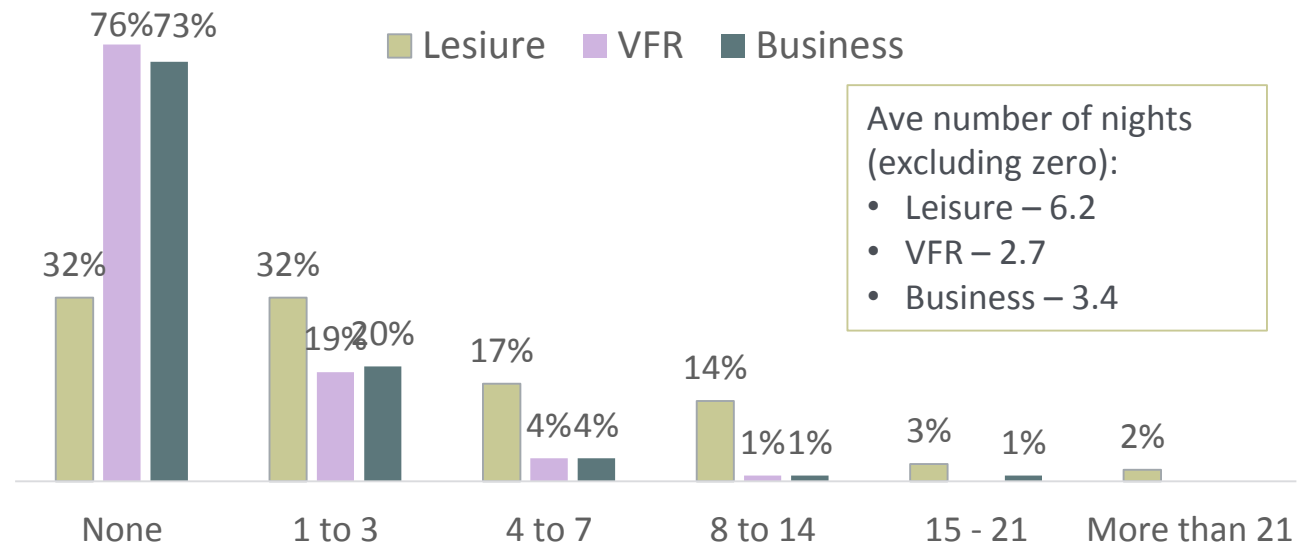
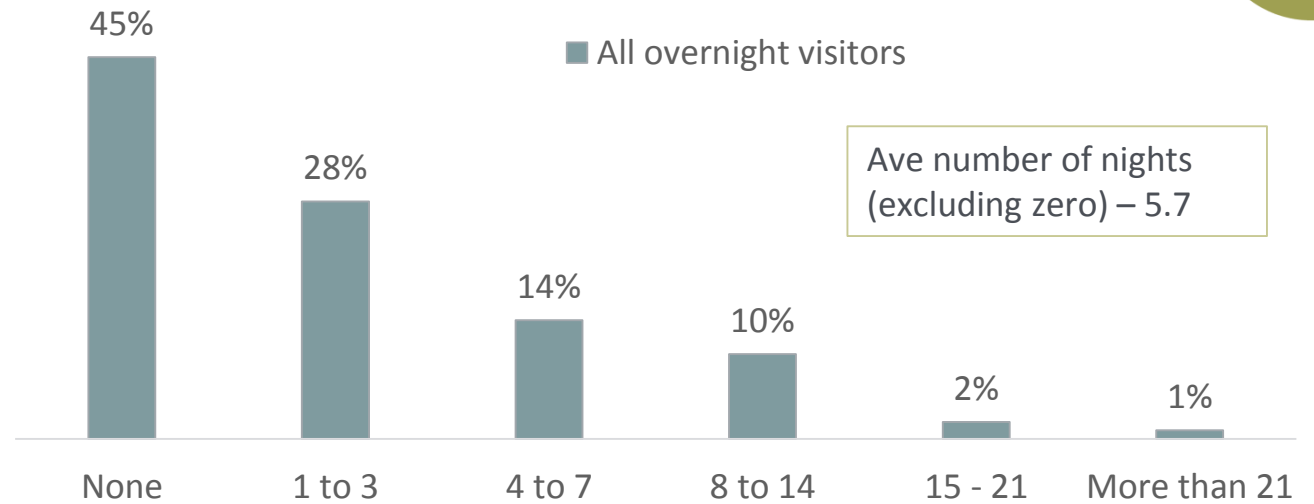
Base (All overnight calibration visitors): Total 2,088, Leisure 1,436; VFR 268; Business 368

Trip profile

Number of nights

- 55% of overnight visitors reported that they spent nights elsewhere in Scotland on their trip.
- As we would expect, the proportion spending nights in other parts of Scotland was far higher for Leisure visitors (68%) than VFR (24%) or Business (27%) visitors.
- Of those who did spend some time in other parts of Scotland, the average number of additional nights was 6 nights for Leisure visitors and 3 nights for VFR and Business visitors.
- Amongst Leisure visitors, visitors from overseas spent the longest period of time in other parts of Scotland:
 - Overseas – 10.8 nights
 - Rest of UK – 4.6 nights
 - Scotland – 2.8 nights

Number of nights - Scotland mainland



Base (All overnight visitors): Total 661, Leisure 515; VFR 60; Business 86

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

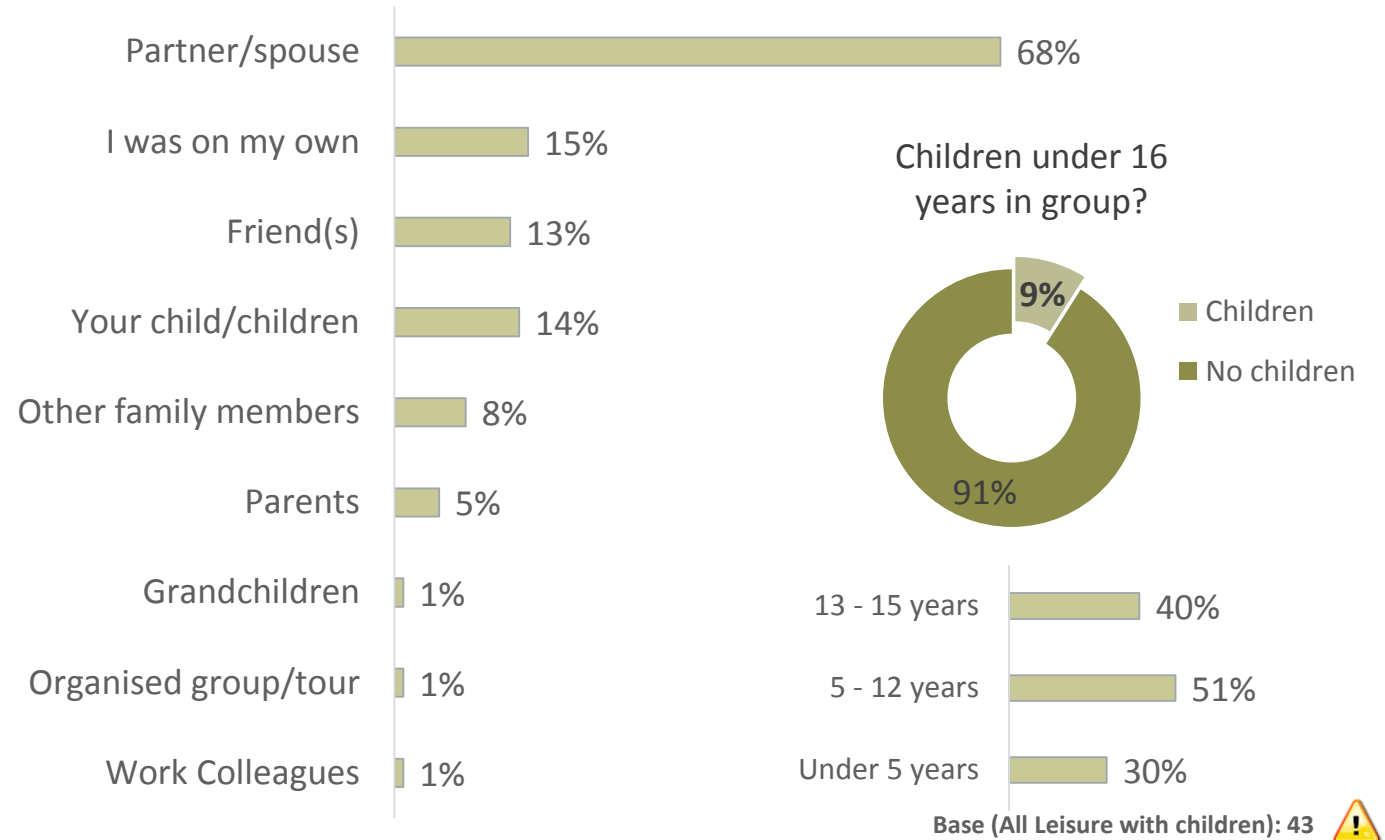
Trip profile

Party composition

- The majority of Leisure visitors to the Outer Hebrides (68%) were travelling with their partner or spouse. It should be noted, however, that 49% in total were **only** travelling with a partner, with others also mentioning others in their group.
- Just over one quarter of visitors (27%) reported that they were travelling with family members, including partners, children, parents and others. Only 9% had children under 16 years old in their group.
- A significant proportion of Leisure visitors (15%) reported that they were travelling alone.
- 35 to 44 year olds were more likely than average to be travelling on their own (28%). Those most likely to be travelling with children under 16 years old were aged 35 to 54 years (19%).



Party composition – Leisure visitors



Base (All leisure): 525

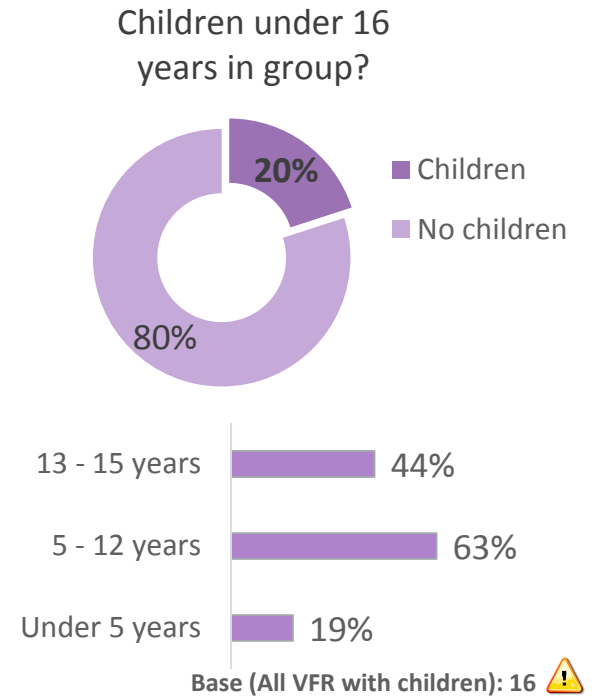
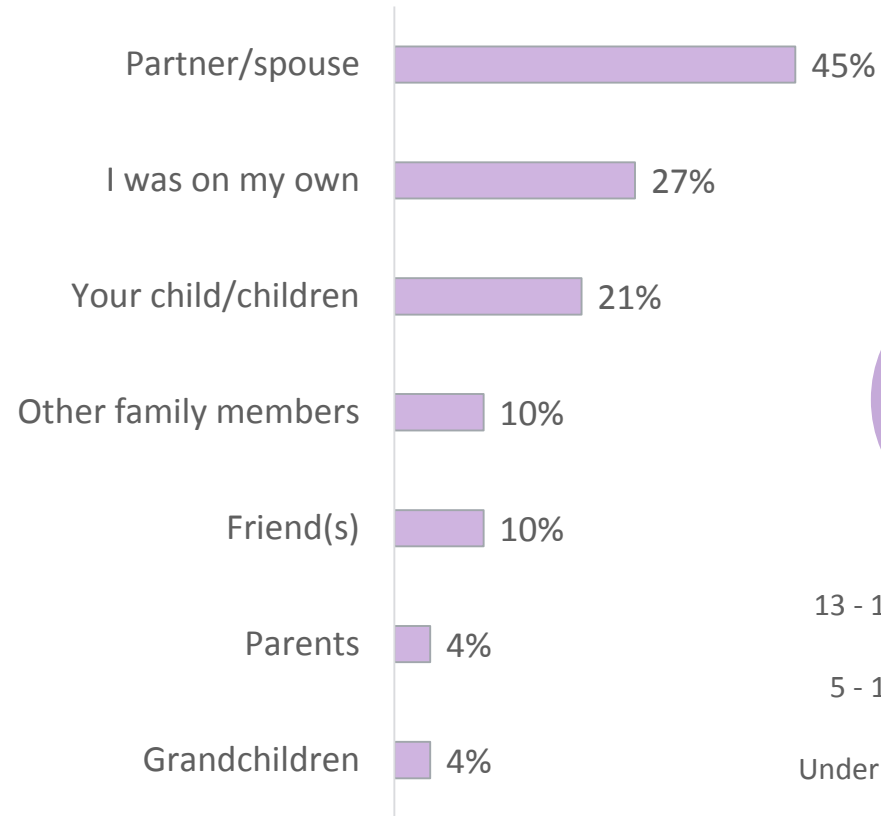
Trip profile

Party composition

- Amongst those travelling to the Outer Hebrides to visit friends and relatives, a higher proportion were travelling alone (27%) compared to Leisure visitors (15%).
- In total, 45% reported that they were visiting with their partner/spouse, with 33% reporting no other people in their group (i.e. they were travelling as a couple).
- A third (33%) were visiting with family members, with 20% reporting having children under 16 years old in their group.



Party composition - Visiting friends and relatives



Base (All VFR): 60

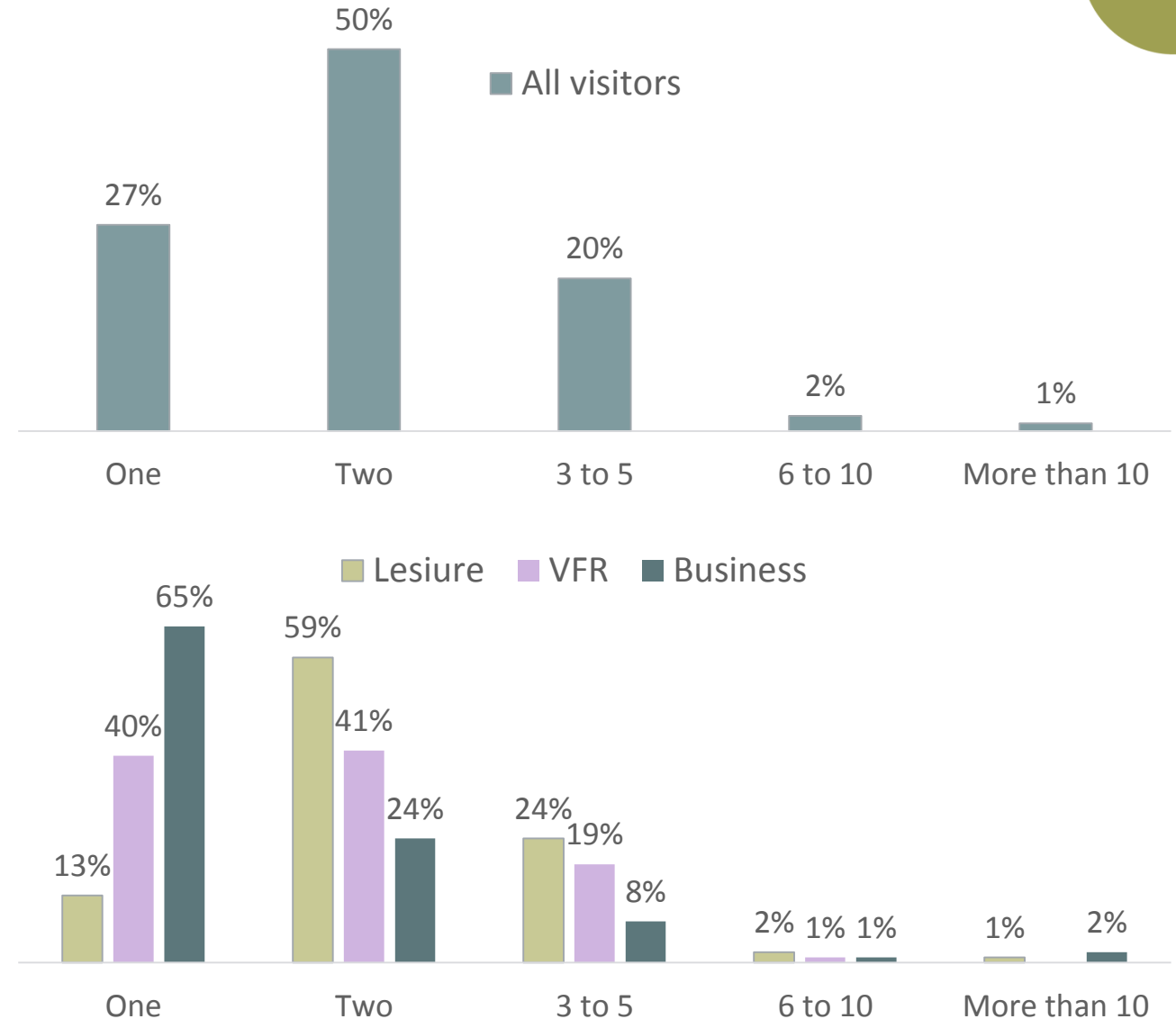
Q11: Which of the following best describes who was with you on your trip?

Trip profile

Party composition

- The majority of all visitors to the Outer Hebrides reported that they were either visiting alone or with one other person.
- However, party size varies considerably by type of visitor. The majority of Business visitors (65%) were visiting alone, while the majority of Leisure visitors (59%) were visiting with one other person. VFR visitors also tended to visit with one other person (41%) or alone (40%).

Number of people in party



Base (All calibration visitors): Total 2,228, Leisure 1,486; VFR 275; Business 436

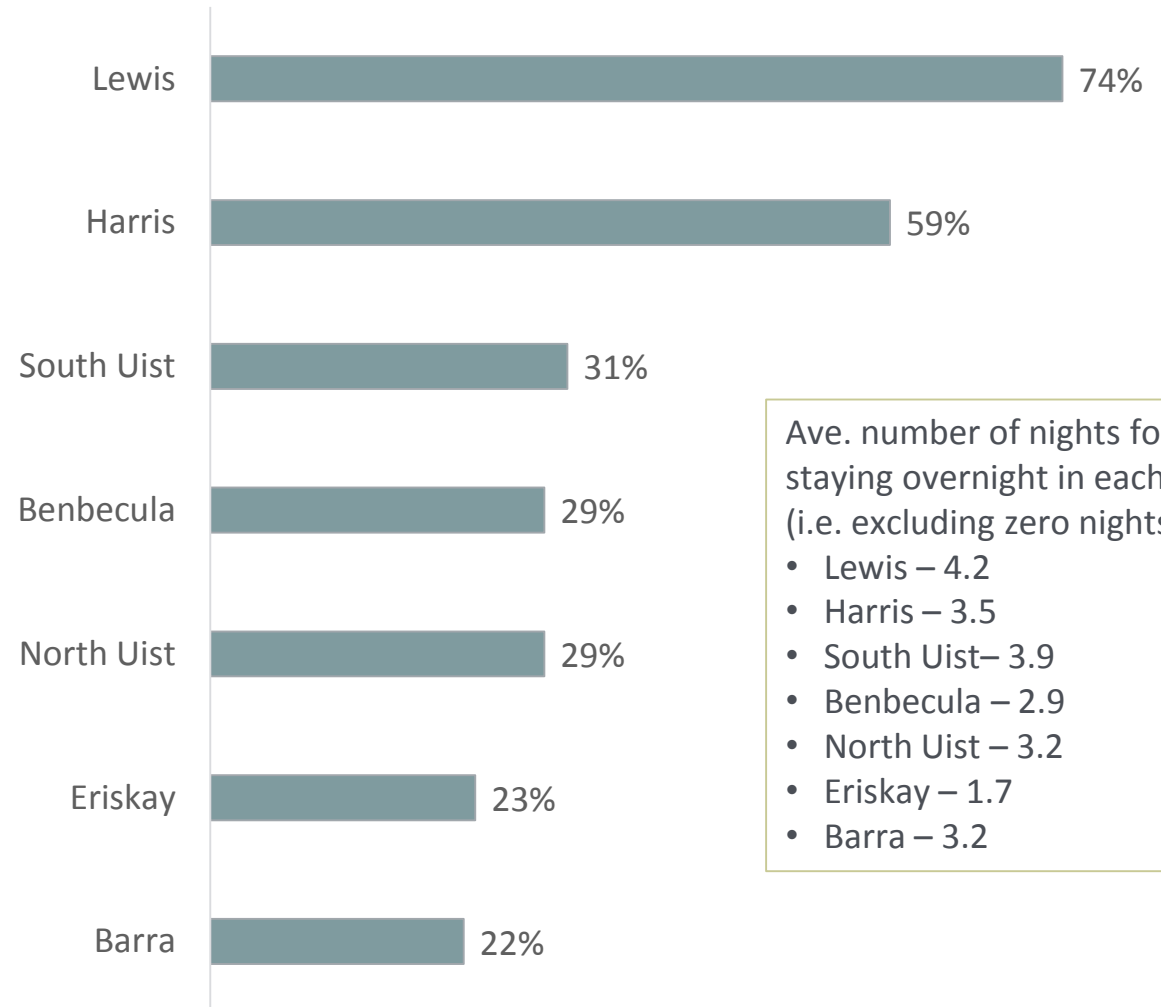
CQ1: How many people, including yourself, are in your immediate group or party?

Trip profile

Areas visited

- Almost three quarters of visitors to the Outer Hebrides reported that they visited Lewis during their trip. The majority (59%) also mentioned visiting Harris.
- Just under a third visited South Uist, Benbecula and North Uist, whilst almost a quarter visited Eriskay and Barra.
- There were variations in the areas of the Outer Hebrides visited depending on visitor type. Generally, Leisure visitors tended to visit a wider variety of locations than Business or VFR visitors. Details of areas visited by each visit type are shown over.

Areas of Outer Hebrides visited - All visitors



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

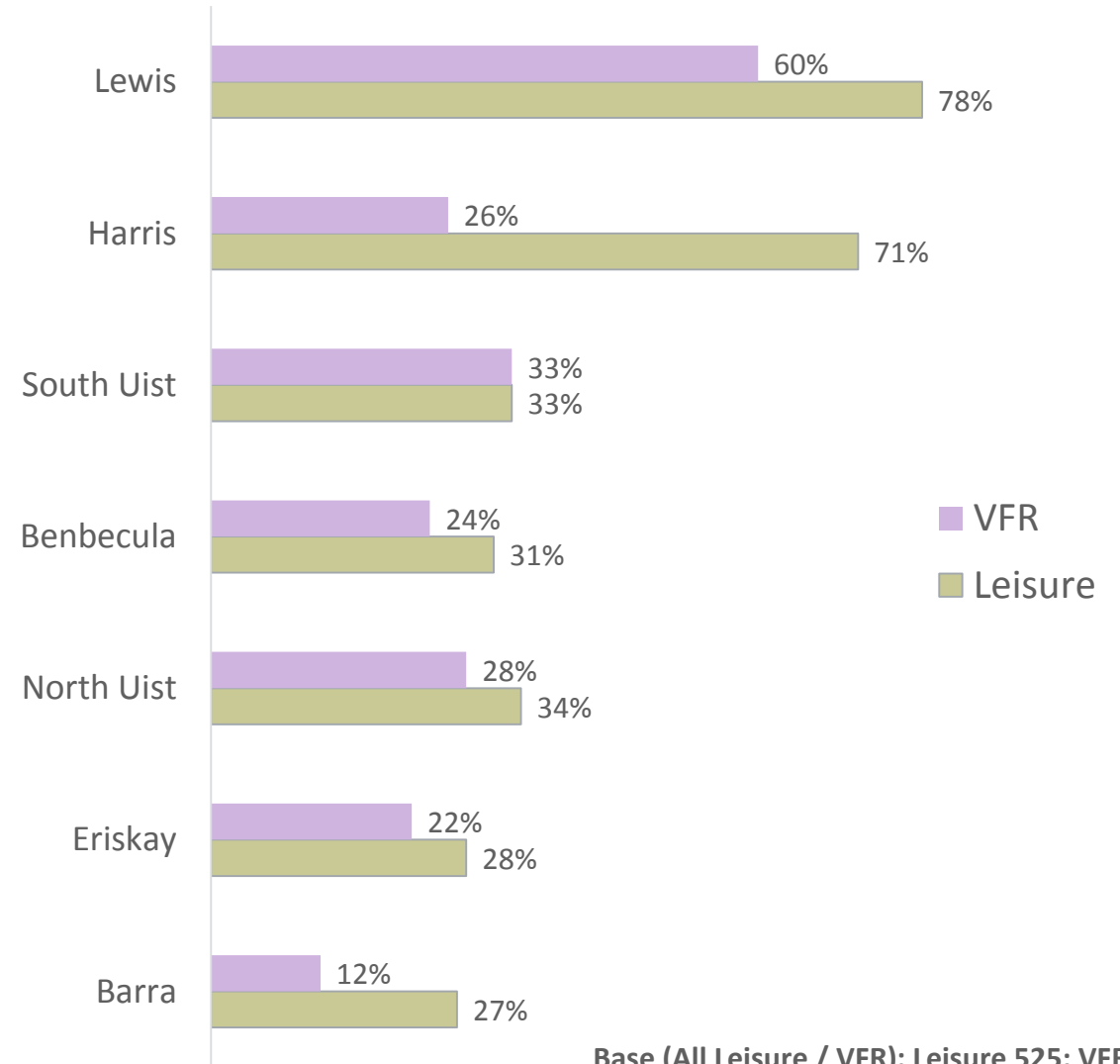
- Lewis – 4.2
- Harris – 3.5
- South Uist – 3.9
- Benbecula – 2.9
- North Uist – 3.2
- Eriskay – 1.7
- Barra – 3.2

Trip profile

Areas visited

- The proportions of visitors visiting each location was generally higher for Leisure visitors than VFR visitors.
- This is to be expected as Leisure visitors are more likely to tour around the Outer Hebrides to take in more sites and attractions than VFR visitors, whose main purpose is to visit friends and family living on the islands.
- The majority of both Leisure and VFR visitors visited Lewis. VFR visitors were considerably less likely than Leisure visitors to visit Harris and Barra.

Areas of Outer Hebrides visited - Leisure and VFR visitors



Base (All Leisure / VFR): Leisure 525; VFR 60

Q15: Which of the following areas of Outer Hebrides did you visit during your trip?

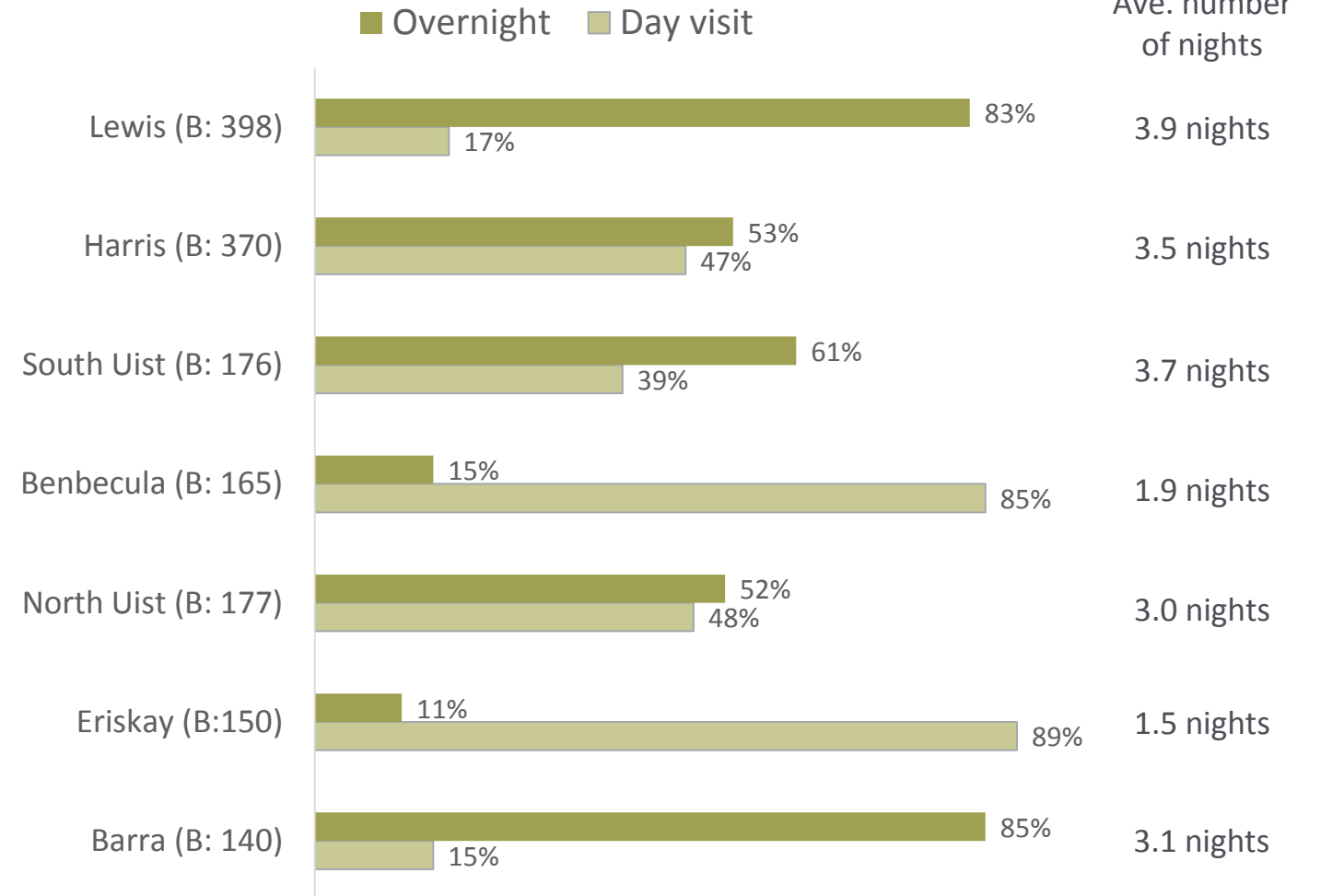
Trip profile

Areas visited

- The majority of visitors to Lewis, South Uist and Barra reported that they stayed overnight.
- Visitors to Benbecula and Eriskay were predominantly day visitors.
- Visitors to Harris and North Uist were almost evenly split between day and overnight visitors.
- Those staying overnight, tend to stay for 2 to 4 nights on each island.



Type of visit in each area - Leisure visitors

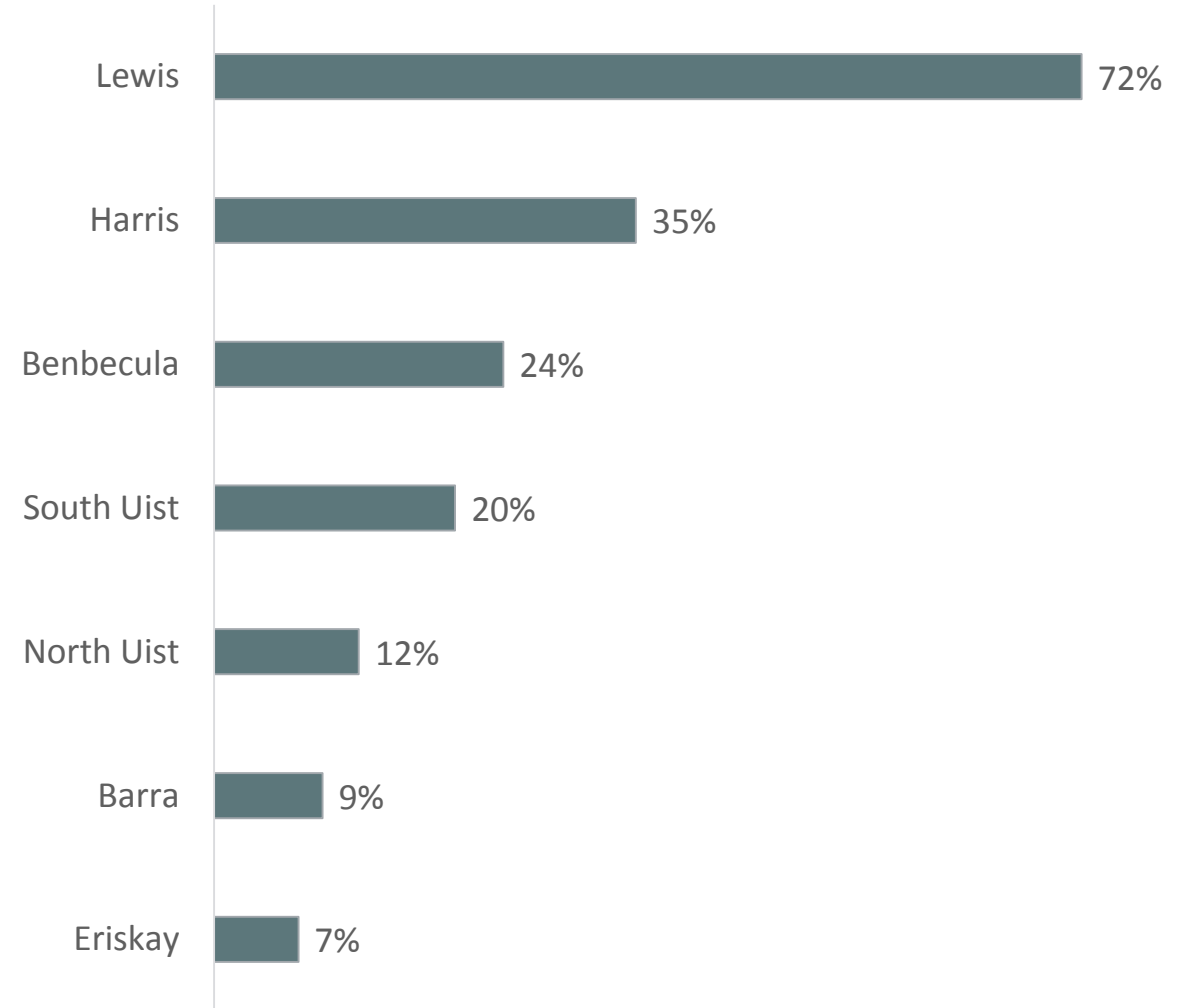


Trip profile

Areas visited

- As we would expect, Business visitors tend to focus on one or two locations, rather than visiting multiple locations across the Outer Hebrides.
- Almost three quarters of Business visitors reported visiting Lewis, while 35% visited Harris.

Areas of the Outer Hebrides visited - Business visitors



Base (All Business): 99

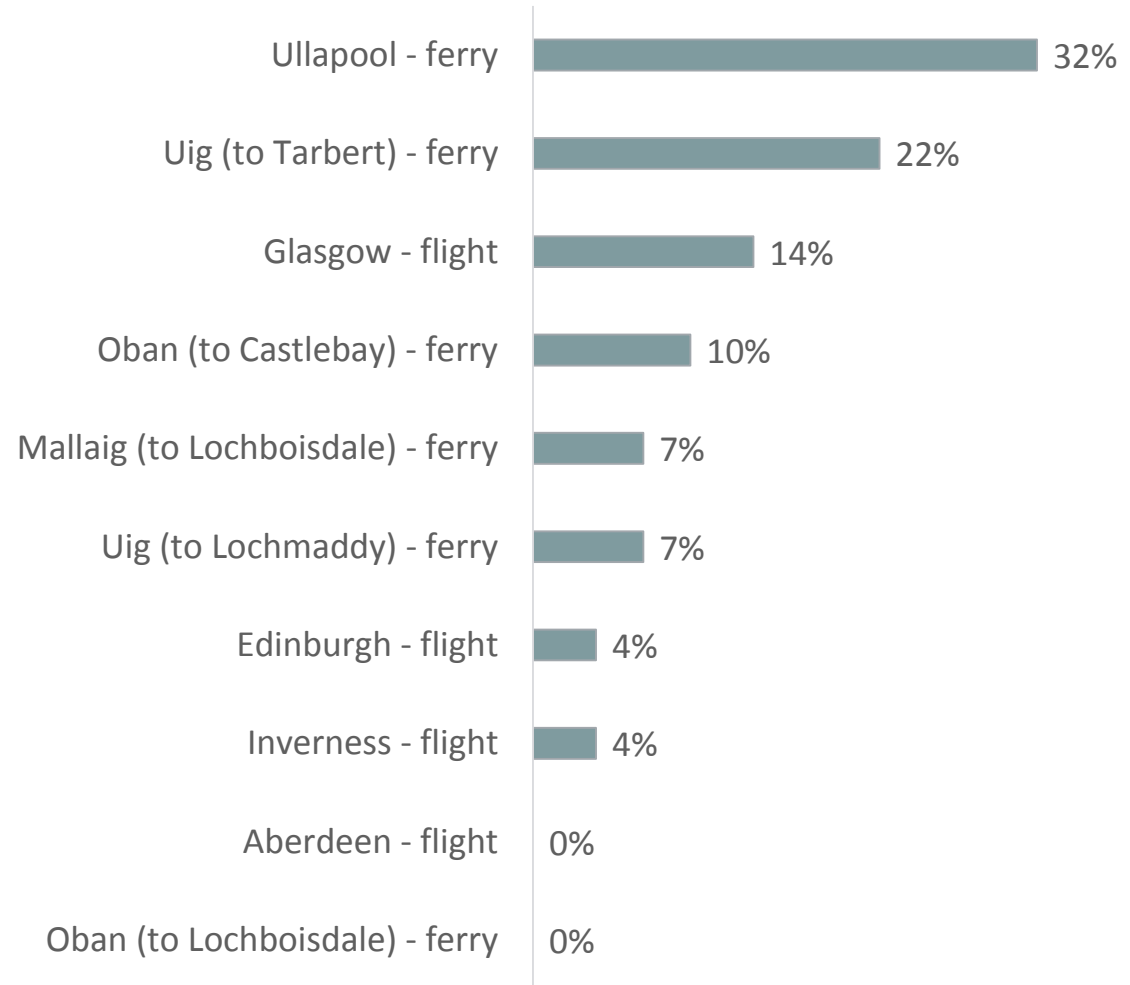
Q15: Which of the following areas of Outer Hebrides did you visit during your trip?

Trip profile

Route to the islands

- Around a third of all visitors arrived by ferry from Ullapool.
- This was followed by 22% who arrived at Tarbert Ferry Terminal from Uig.
- The most popular airport that visitors tended to fly from was Glasgow (14%).
- Mainland departure points differed by type of visitor. Full details can be viewed on the following chart.

Origin airport/ferry terminal on mainland

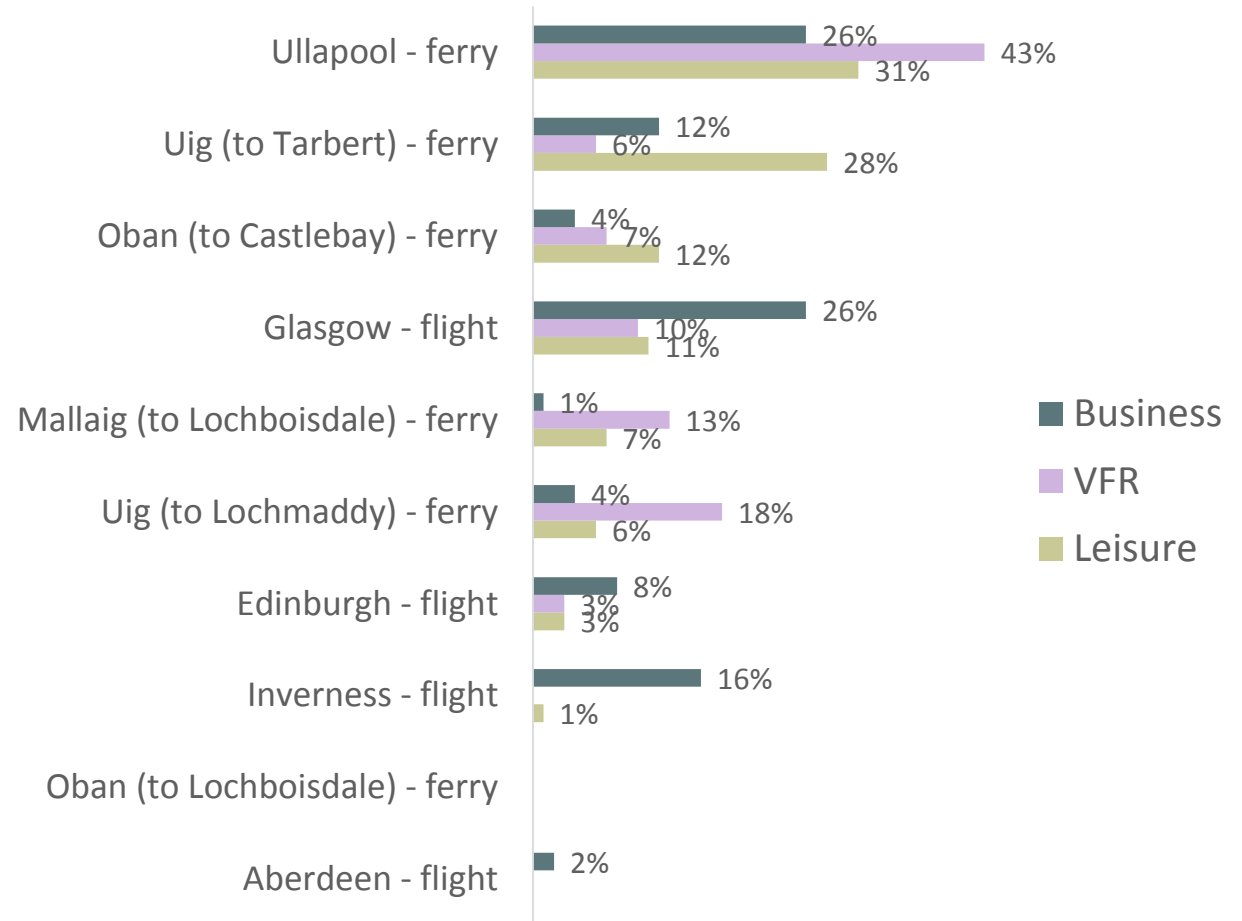


Trip profile

Route to the islands

- Arriving from Ullapool was popular amongst across all visitor types; however VFR visitors (43%) were more likely to use this route than Leisure (31%) or Business visitors (26%).
- Uig to Tarbert was also a popular route for Leisure visitors (28%), whereas VFR were more likely to travel to Lochmaddy from Uig (18%).
- Business visitors were more likely than Leisure or VFR visitors to travel by air to the Outer Hebrides, particularly on flights from Glasgow (26%) and Inverness (16%).

Origin airport/ferry terminal on mainland – Visitor type



Base (All): Leisure 525; VFR 60; Business 99

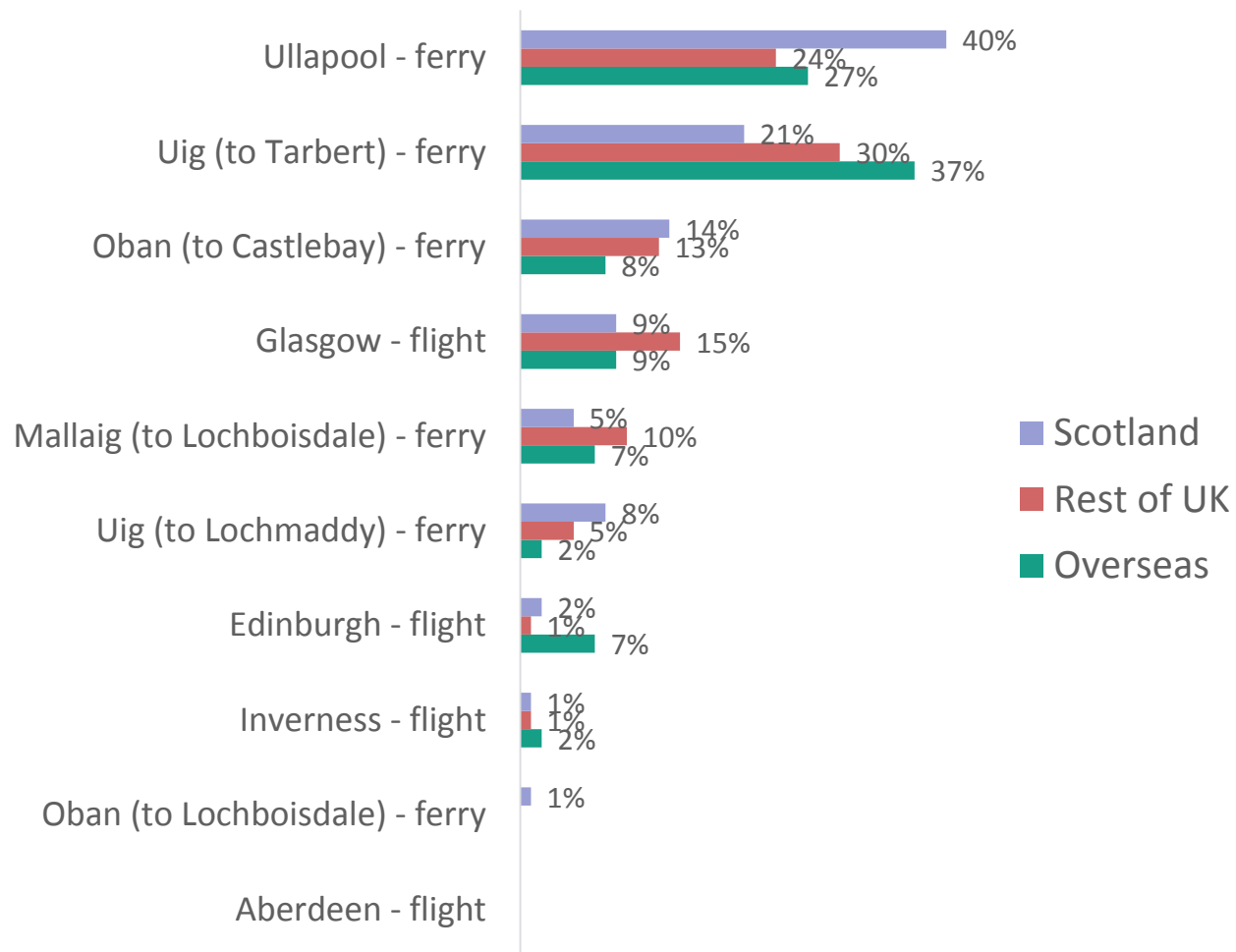
Q20: Which airport or ferry terminal did you arrive from when you travelled to the Outer Hebrides?

Trip profile

Route to the islands

- Arriving from Ullapool was popular amongst all visitors; however those from Scotland were more likely to travel from there (40%) than visitors from the rest of the UK (24%) or overseas (27%).
- Uig to Tarbert was the most popular route for those visiting from overseas (37%) and the rest of the UK (30%).
- Visitors from overseas were also more likely to depart from Edinburgh airport (7%) than those from Scotland (2%) or rest of the UK (1%).

Origin airport/ferry terminal on mainland – by market (Leisure only)

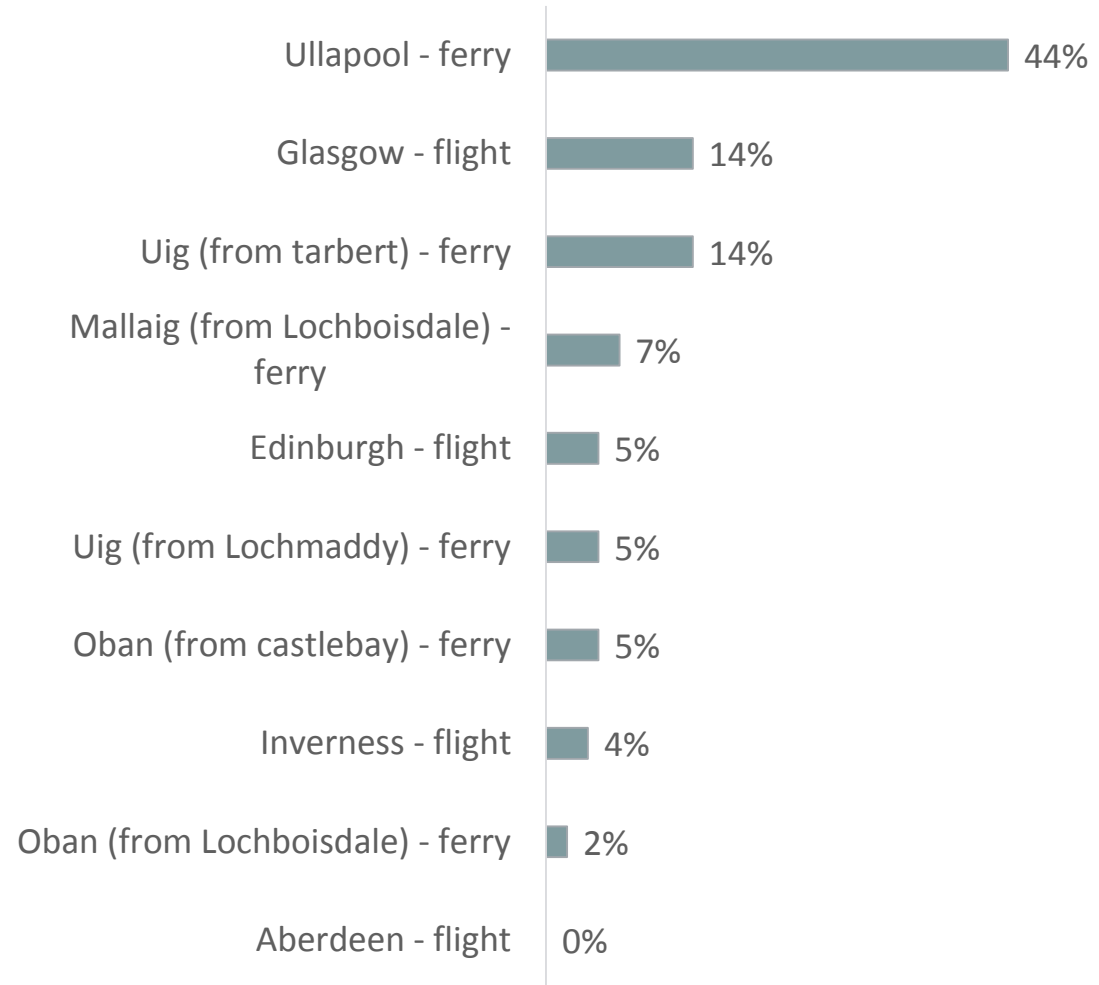


Trip profile

Route leaving the islands

- Similar to routes to the islands, the most popular route for leaving the Outer Hebrides was Ullapool (44%). A higher proportion returned to Ullapool than departed from there (32%) suggesting that some visitors travelled around the various islands and left from a different departure point.
- Again Glasgow airport was the most popular airport to return to (14%).

Destination airport/ferry terminal on mainland

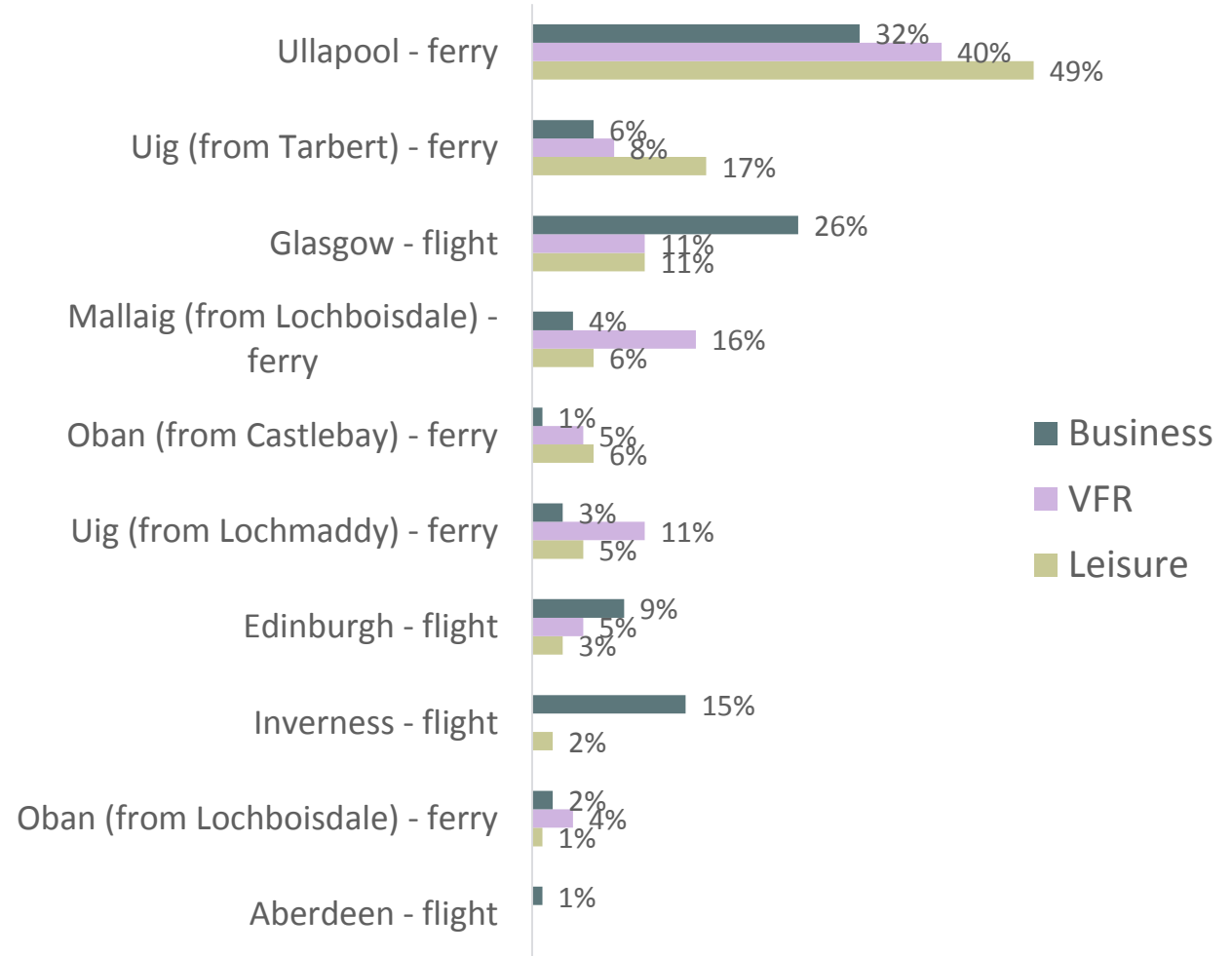


Trip profile

Route leaving the islands

- The most popular destination when leaving the islands for all visitor types was Ullapool.
- Leisure (49%) and VFR visitors (40%) were more likely to depart to Ullapool than Business visitors (32%).
- VFR visitors (16%) were more likely to depart from Lochboisdale to Mallaig than Leisure (6%) or Business (4%) visitors.
- Business visitors were again more likely than Leisure or VFR visitors to travel by air.

Destination airport/ferry terminal on mainland – Visitor type



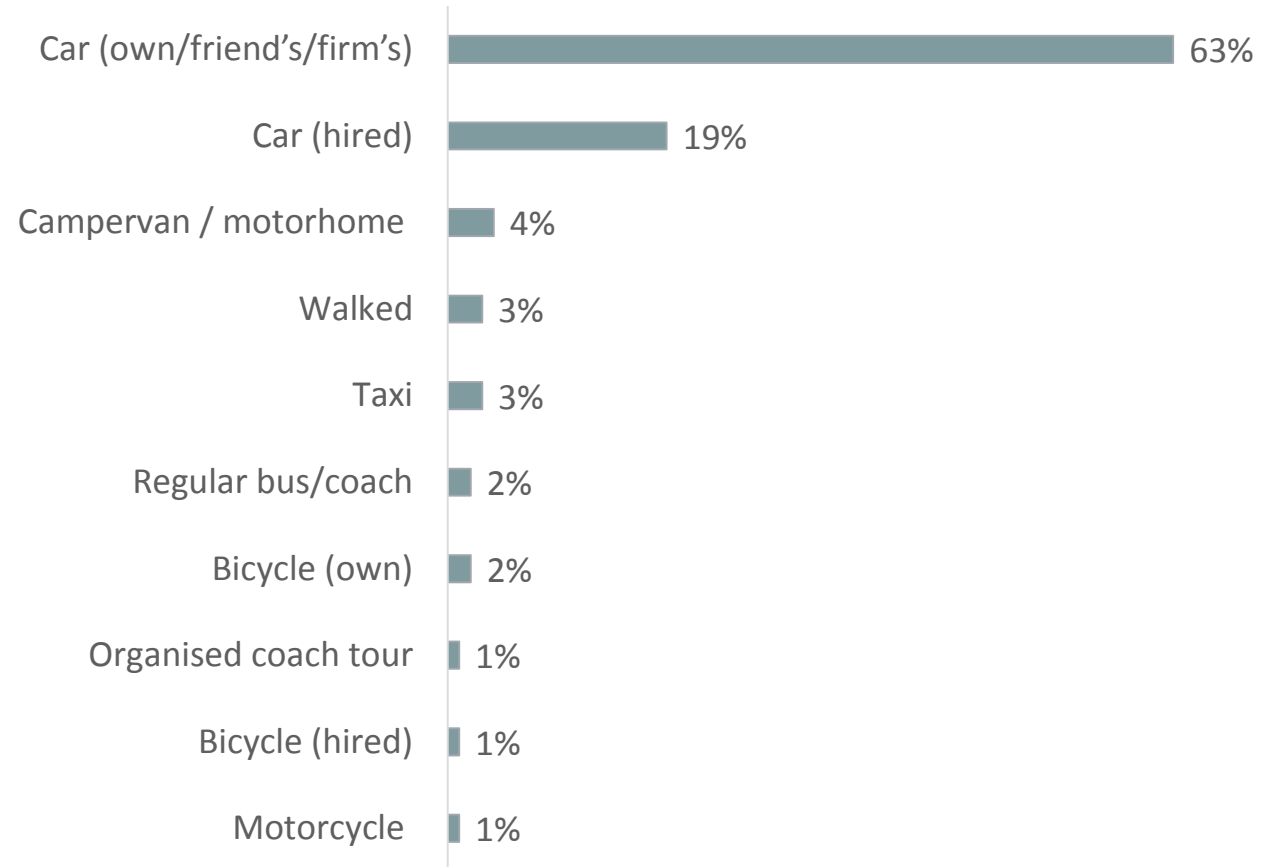
Base (All Leisure / VFR): Leisure 525; VFR 60; Business 99

Trip profile

Transport

- The largest proportion of visitors (82%) reported that they had travelled by car during their visit – 63% using their own car and 19% using a hired car.
- All other forms of transport were mentioned by smaller minorities of visitors.
- Using a privately owned car was more frequently mentioned by VFR visitors (86%) than Leisure (61%) or Business (54%) visitors. Hire cars were more frequently mentioned by Leisure visitors (21%) and Business visitors (23%) than VFR visitors (6%).
- Taxis were used by 13% of Business visitors.

Main type of transport during visit



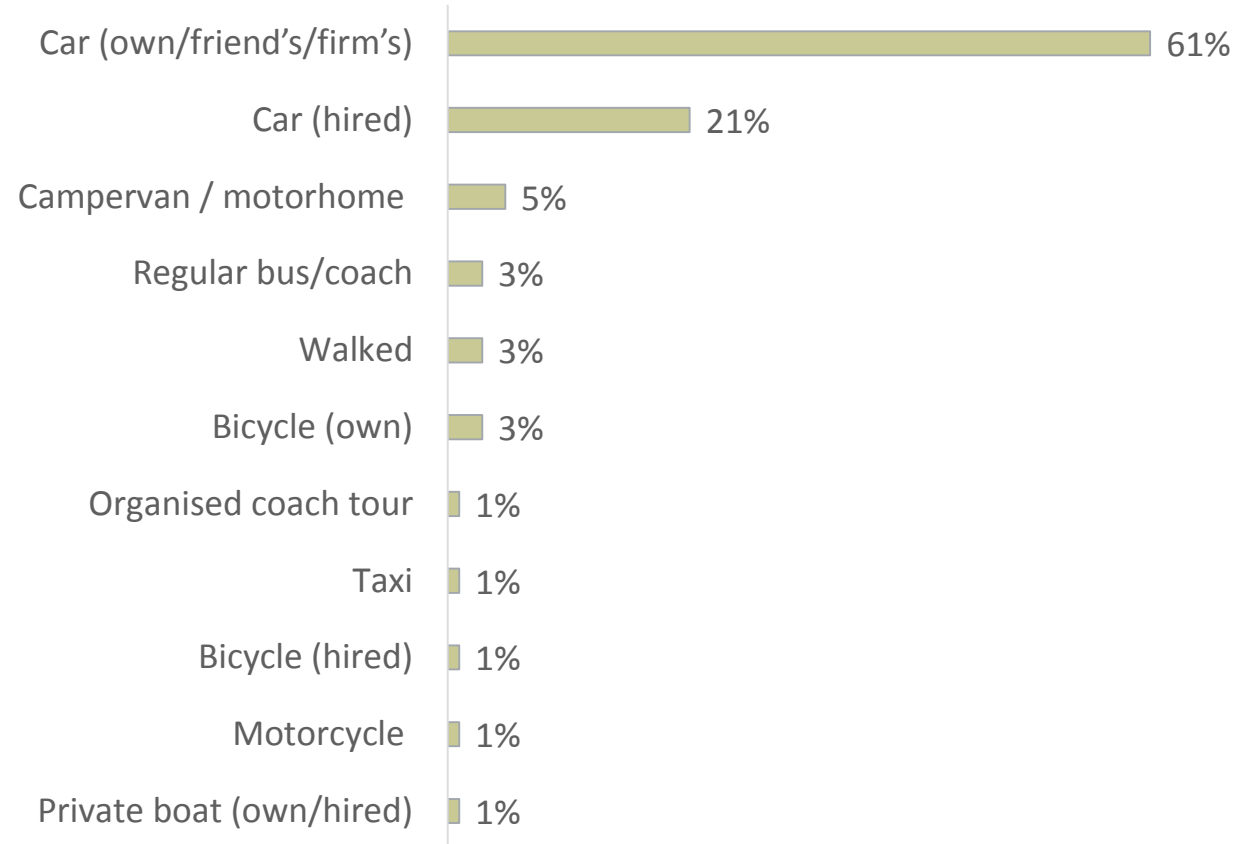
Base (All, excluding rotational shift workers): 648

Trip profile

Transport

- Cars were the most often used transport for Leisure visitors, including both private cars (61%) and rental cars (21%).
- Visitors from Scotland (78%) and the rest of the UK (66%) were more likely to use their own car than those from overseas (20%).
- 62% of overseas visitors reported using a hire car.

Main type of transport during visit – Leisure visitors

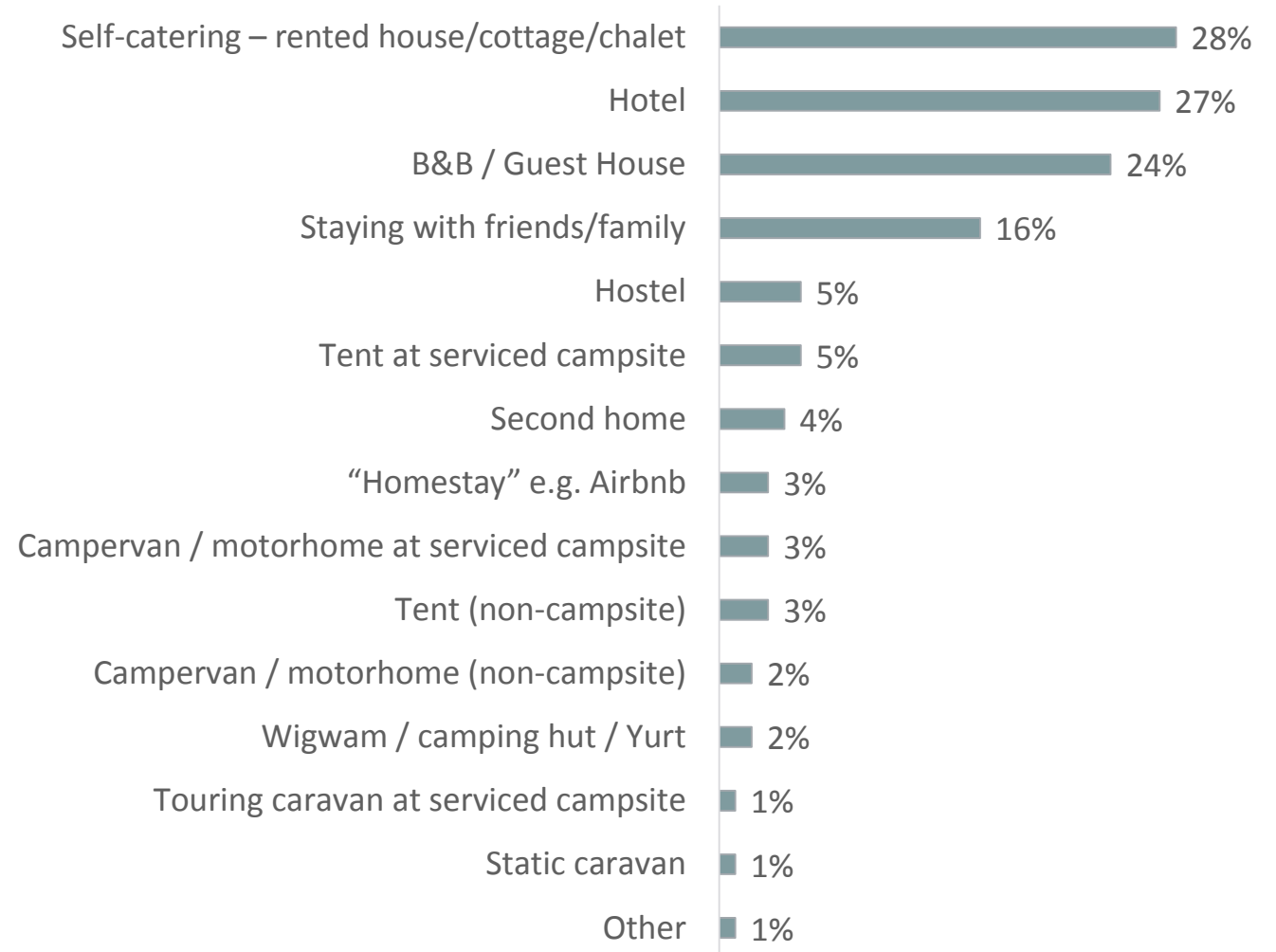


Trip profile

Accommodation

- Self-catering accommodation (28%) and hotels (27%) were the most often used types of accommodation for overnight visitors, followed by B&Bs (24%) and staying with friends/family (16%).
- Hotels were particularly prevalent amongst Business visitors (55%), compared to Leisure (24%) and VFR (7%) visitors.
- Self-catering accommodation was more common amongst Leisure visitors (34%), compared to VFR (13%) and Business (14%) visitors.
- As expected, the majority of VFR visitors were staying with friends or relatives (75%).

Accommodation stayed in during visit – Overnight visitors



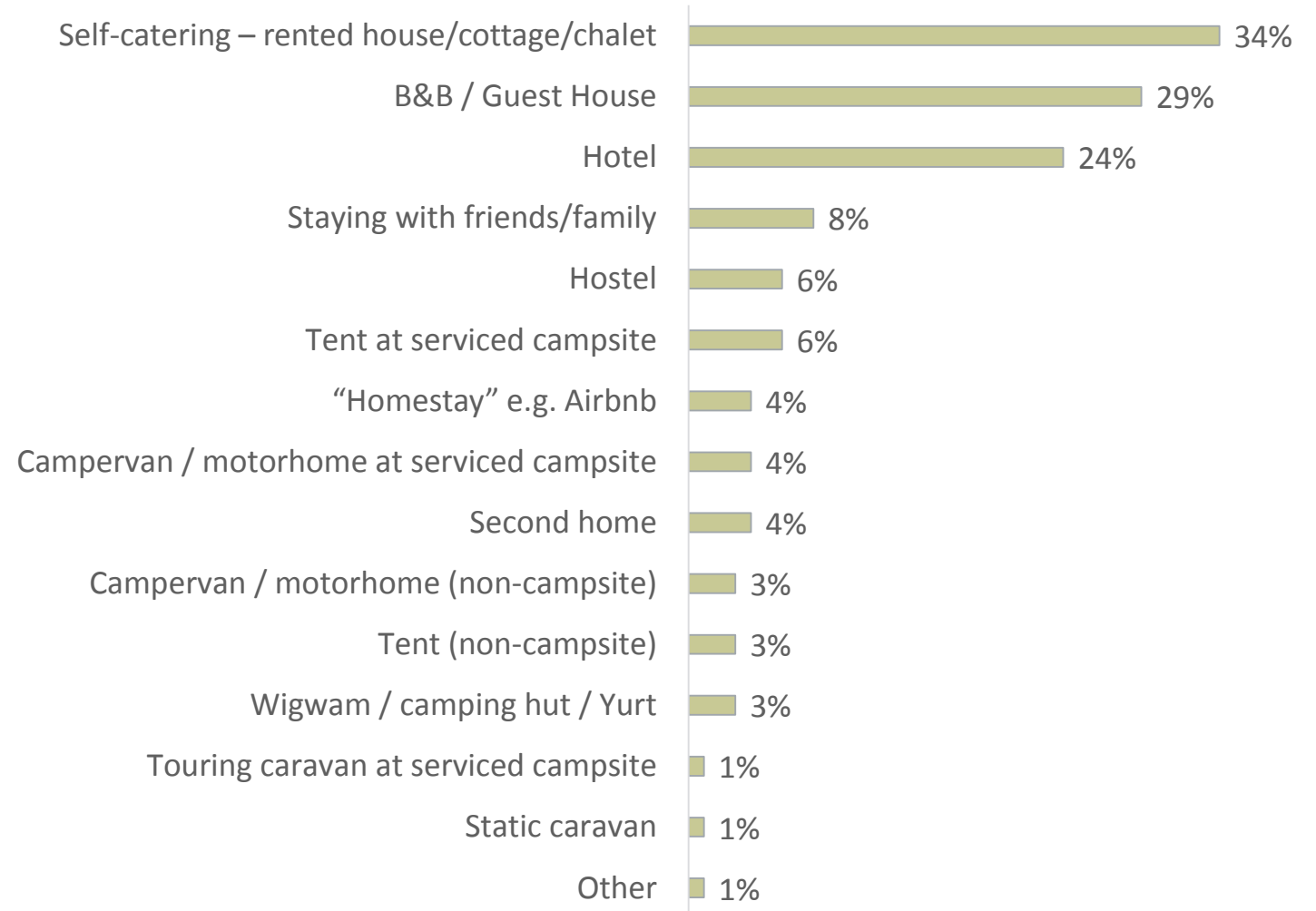
Base (All overnight visitors): 661

Trip profile

Accommodation

- Self-catering accommodation was the preferred option for one third of Leisure visitors, while 29% stayed in B&Bs and a quarter stayed in hotels.
- Overseas visitors were more likely than UK visitors to stay in a B&B or guest house – 48%, compared to 23% of Scotland visitors and 23% of rest of UK.
- Self-catering was more often selected by Scotland (38%) and rest of UK visitors (38%) than overseas visitors (22%).
- Younger respondents aged under 35 years were more likely than average to stay in a ‘homestay’ property (13%) or stay with friends (16%).
- The average number of nights spent varied by type of accommodation:
 - Self-catering – 7.6 nights
 - Friends and family – 5.9 nights
 - B&B / guest house – 5.1 nights
 - Hotel – 4.0 nights

Accommodation stayed in during visit – Overnight Leisure visitors



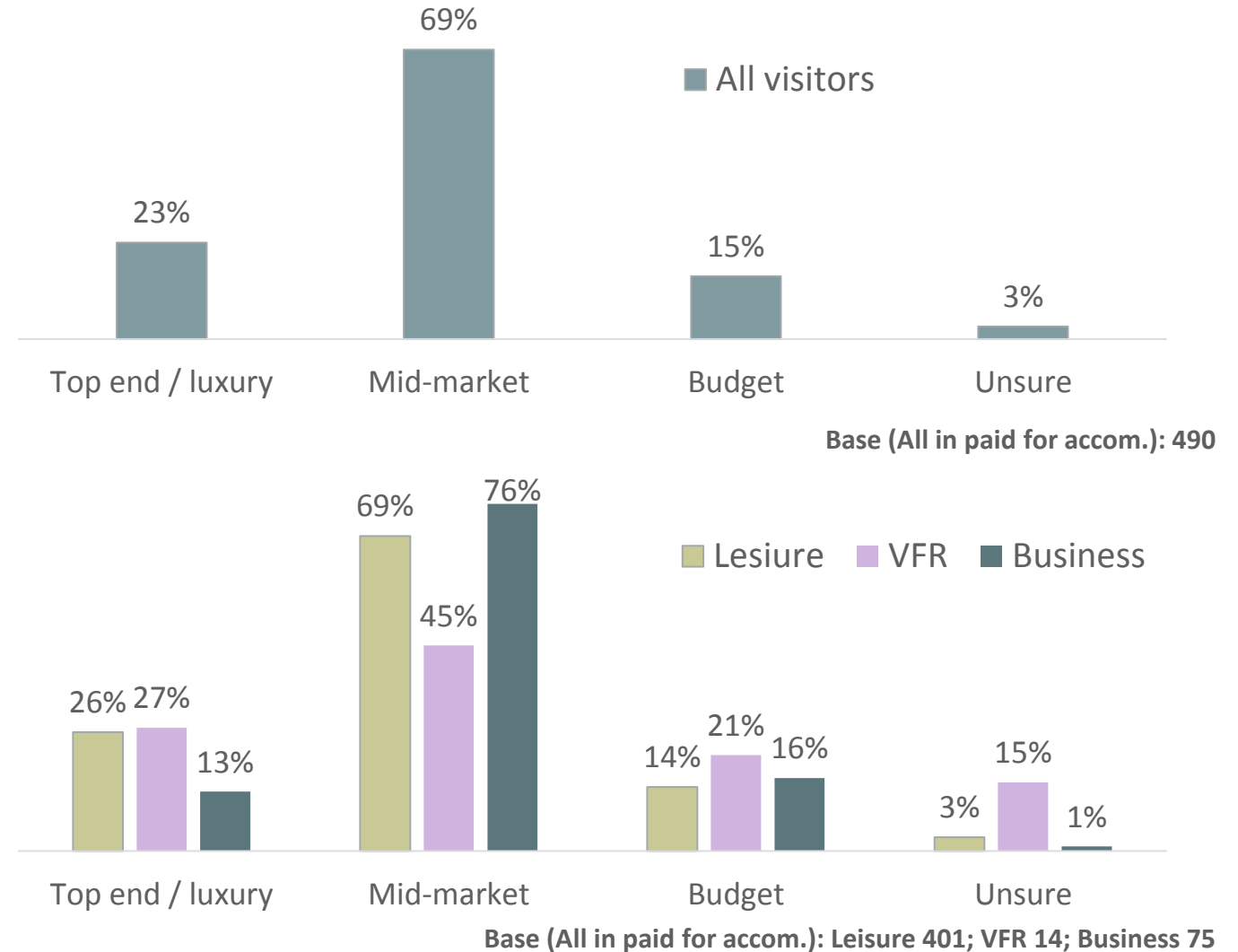
Base (All overnight Leisure visitors): 515

Trip profile

Accommodation

- The majority of visitors to the Outer Hebrides (69%) who were staying in paid for accommodation described their accommodation as 'mid-market'.
- Of the remainder, just under a quarter (23%) described their accommodation as luxury, with only 15% describing it as budget.
- VFR visitors were less likely to describe their accommodation as mid-market (45%) than Leisure (69%) and Business (76%) visitors.
- There were no significant differences by origin or age in terms of type of accommodation.

Type of accommodation – Overnight in paid for accommodation

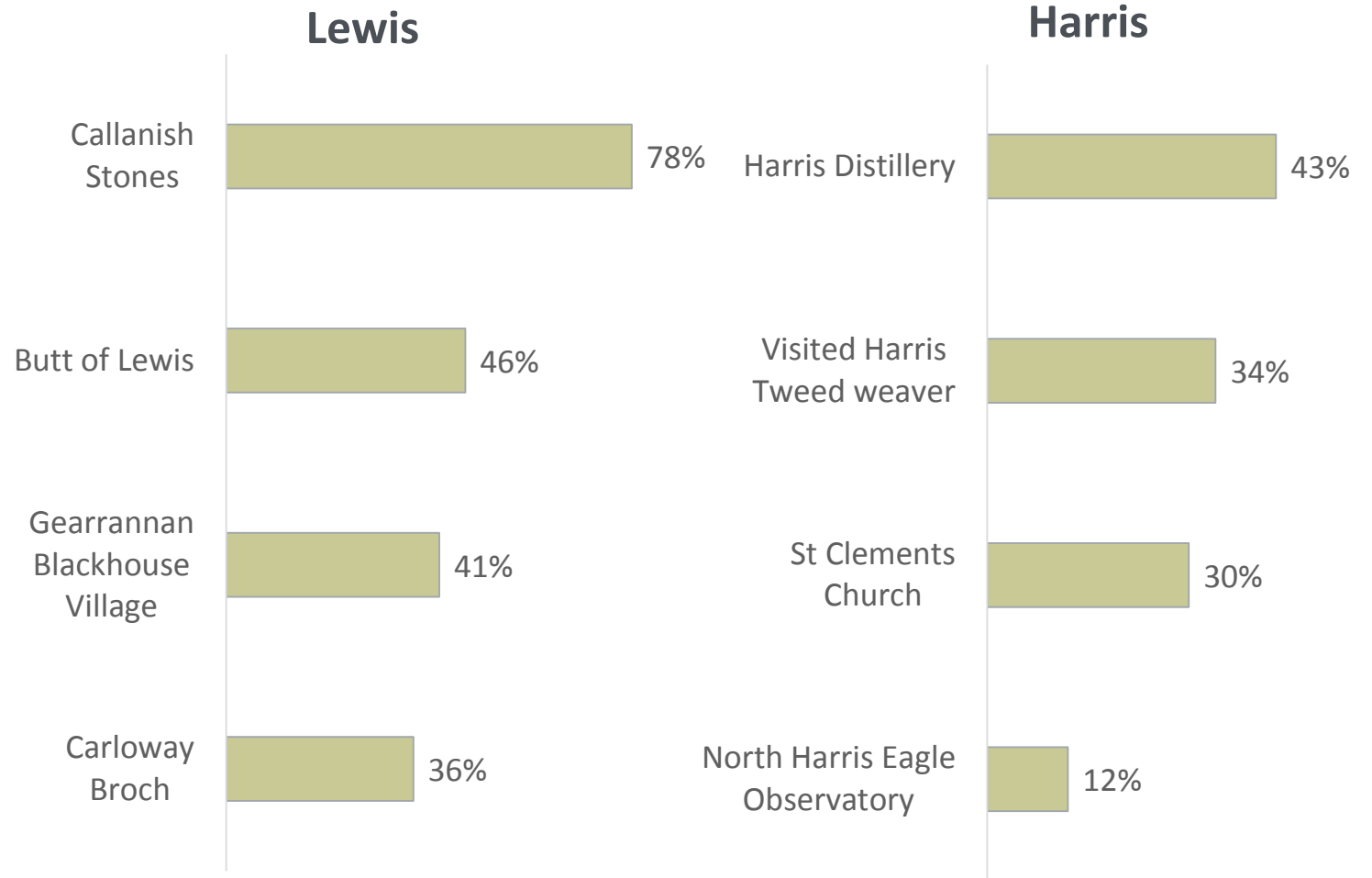


Trip profile

Attractions visited

- Visitors were asked what attractions they visited on each of the islands. The top four responses have been provided for the four most popular islands. Results for Lewis and Harris are shown opposite, while results for Benbecula and South Uist are shown over.
- The Callanish Stones was the most popular attraction (78%) for Leisure visitors to Lewis followed by the Butt of Lewis (46%).
- The most popular attraction on Harris was the Harris Distillery (43%) and a third stated they visited Harris Tweed weaver.

Top attractions visited - Leisure visitors

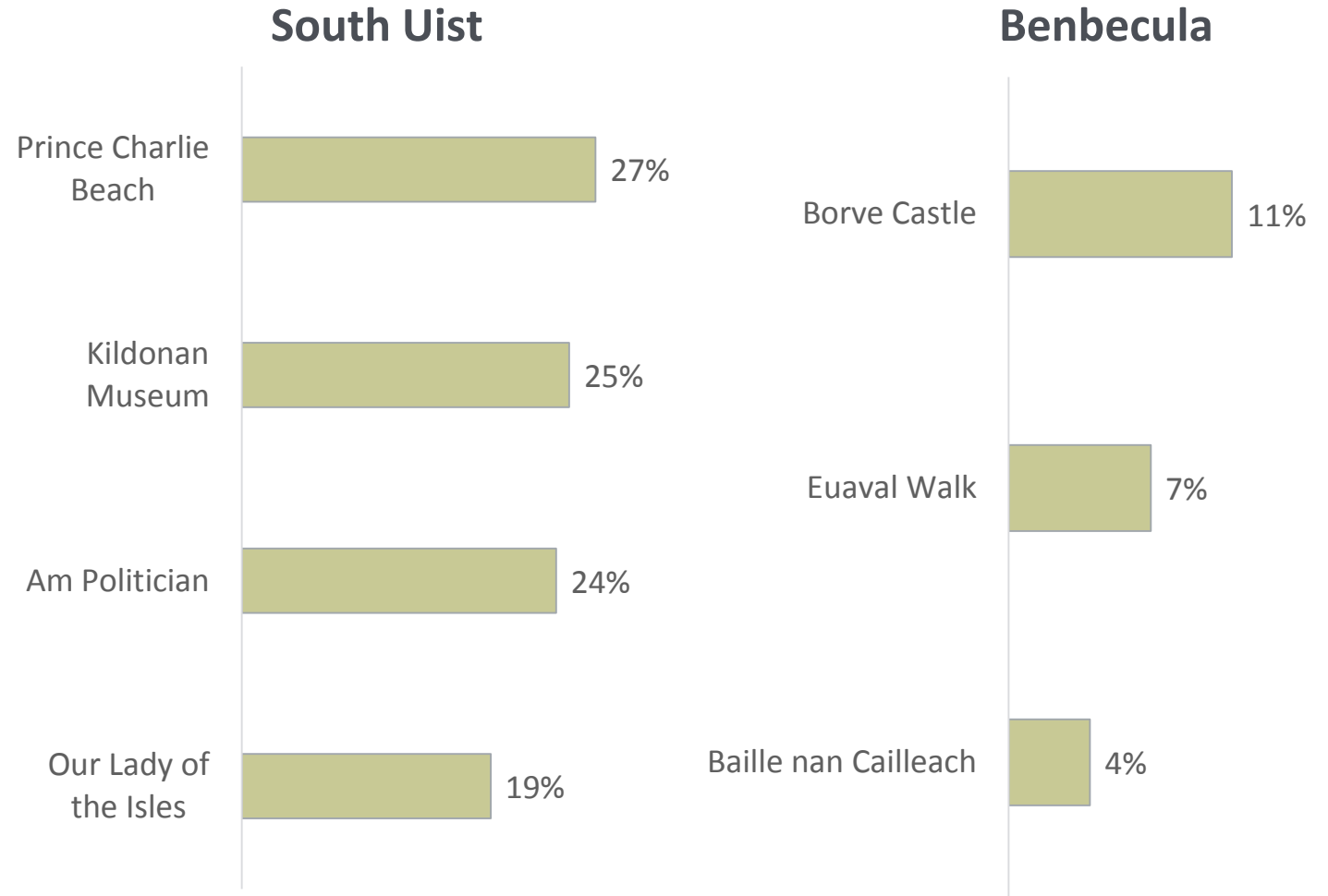


Trip profile

Attractions visited

- There was no stand out attraction at South Uist. Around a quarter of Leisure visitors who went to South Uist visited Prince Charlie Beach, Kildonan Museum and the Am Politician.
- Very few mentioned visiting an attraction when visiting Benbecula. Just over a quarter (26%) mentioned an attraction, with 11% visiting Borge Castle.
- The main attractions mentioned by visitors to North Uist and Berneray were: Balranald Nature Reserve (29%); St Kilda viewpoint (24%); and the Hebridean Smokehouse (24%).
- The top attractions mentioned by visitors to Barra and Vatersay were: the airport beach (84%); Catalina Plane Site (33%); and Kisimul Castle (26%).

Top attractions visited - Leisure visitors



Trip profile

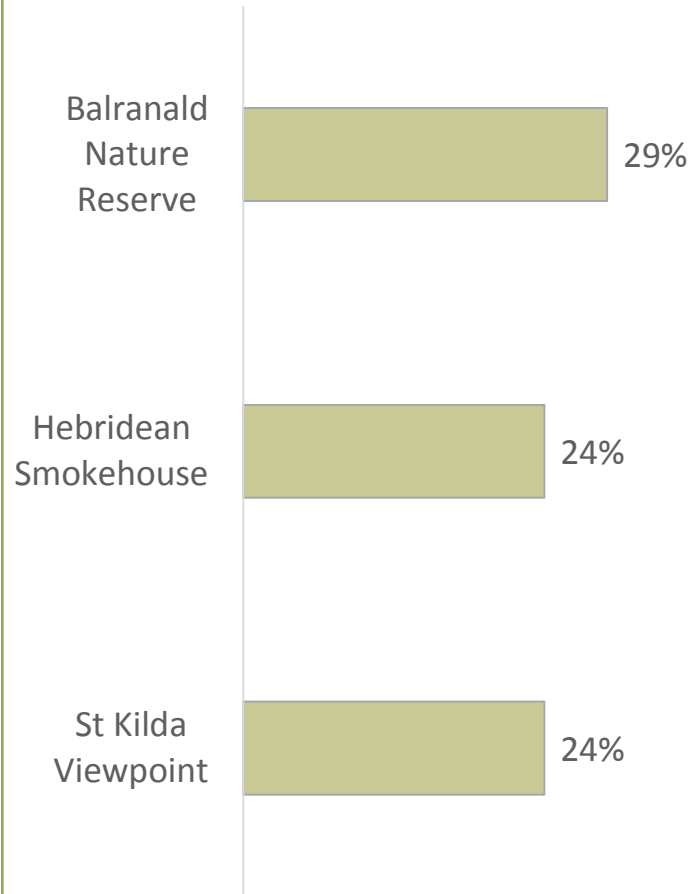
Attractions visited

- Around a quarter of Leisure visitors who went to North Uist / Berneray visited Balranald Nature Reserve, Hebridean Smokehouse and St Kilda Viewpoint.
- The top attractions mentioned by visitors to Barra and Vatersay were: the airport beach (84%); Catalina Plane Site (33%); and Kisimul Castle (26%).

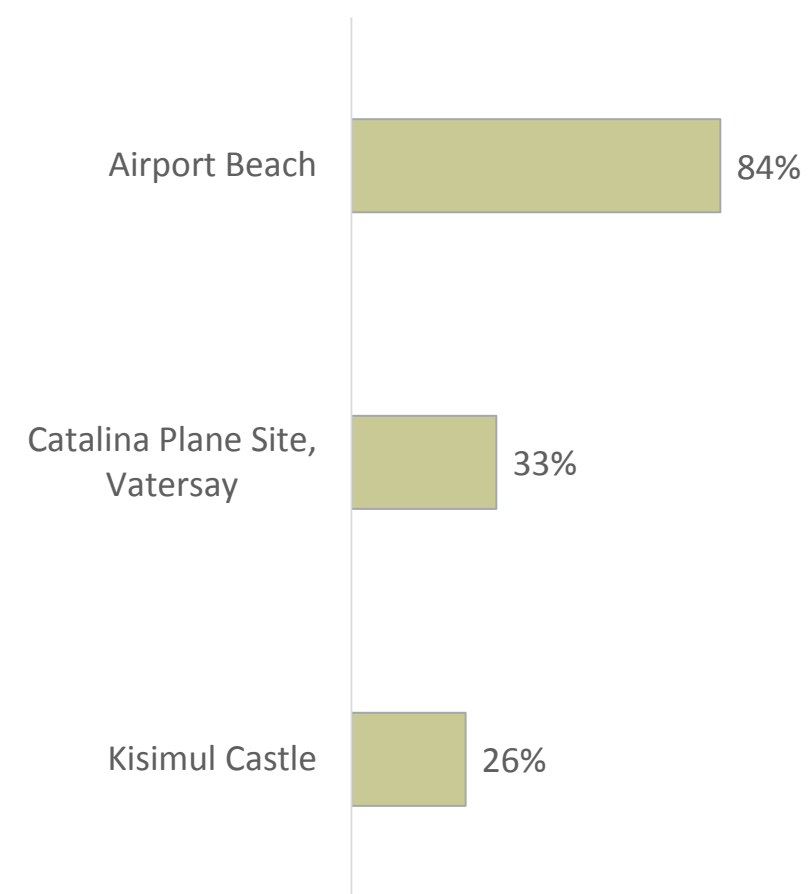
Top attractions visited - Leisure visitors



North Uist / Berneray



Barra / Vatersay

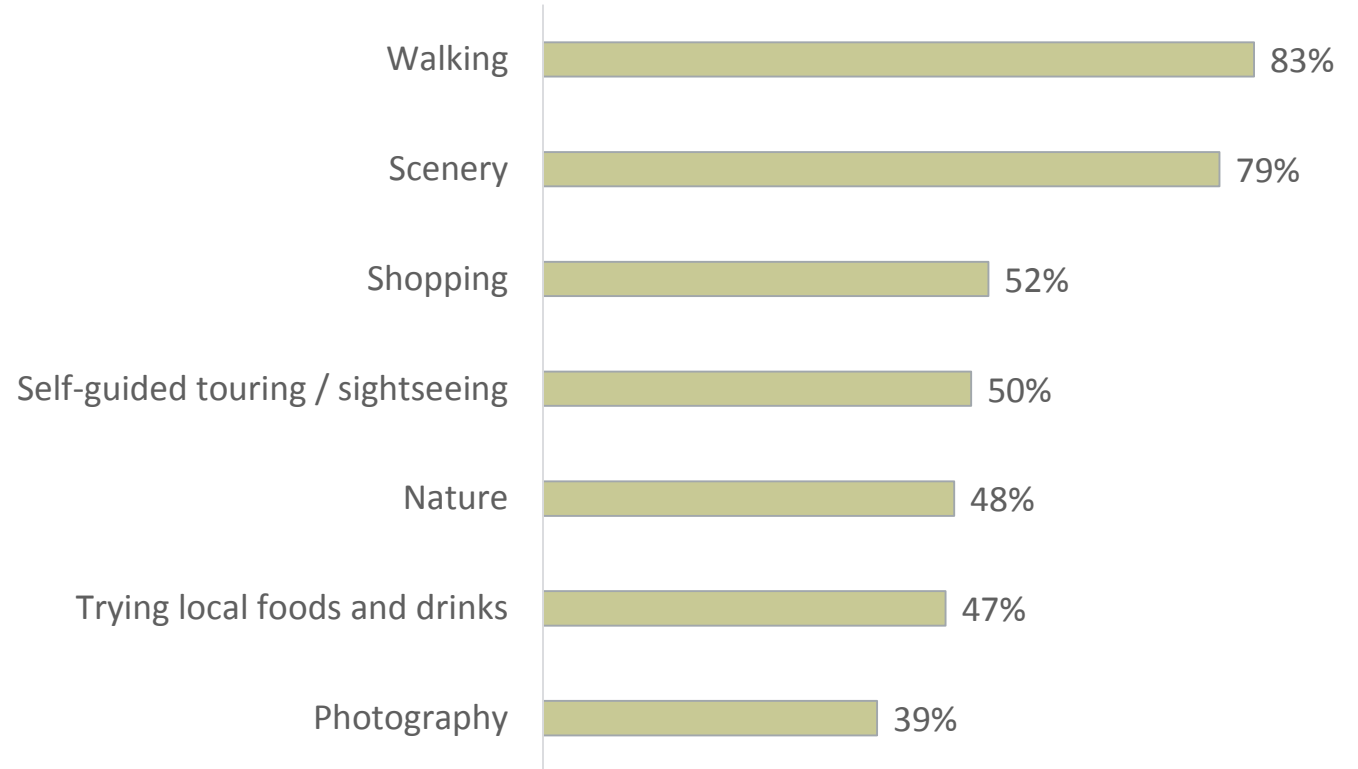


Trip profile

Activities

- Respondents were also asked what activities they participated in during their trip to the Outer Hebrides. The data shown here combines the figures from the chart over to show grouped activities, such as walking (including long and short walks), scenery (beaches, viewpoints, etc.) and shopping (local crafts and other).
- The majority took part in a variety of activities including walking (83%), enjoying scenery (79%) and shopping (52%).
- Visitors from the rest of the UK (57%) and overseas (54%) were more likely to mention nature activities than those from Scotland (38%).
- 35-44 year olds (61%) were more likely to partake in nature related activities than other age groups and females were more likely to go shopping (58%) and enjoy the scenery (84%) than males (shopping - 47%, scenery - 75%).

Top activities on the Outer Hebrides - Leisure visitors



Base (All Leisure): 525

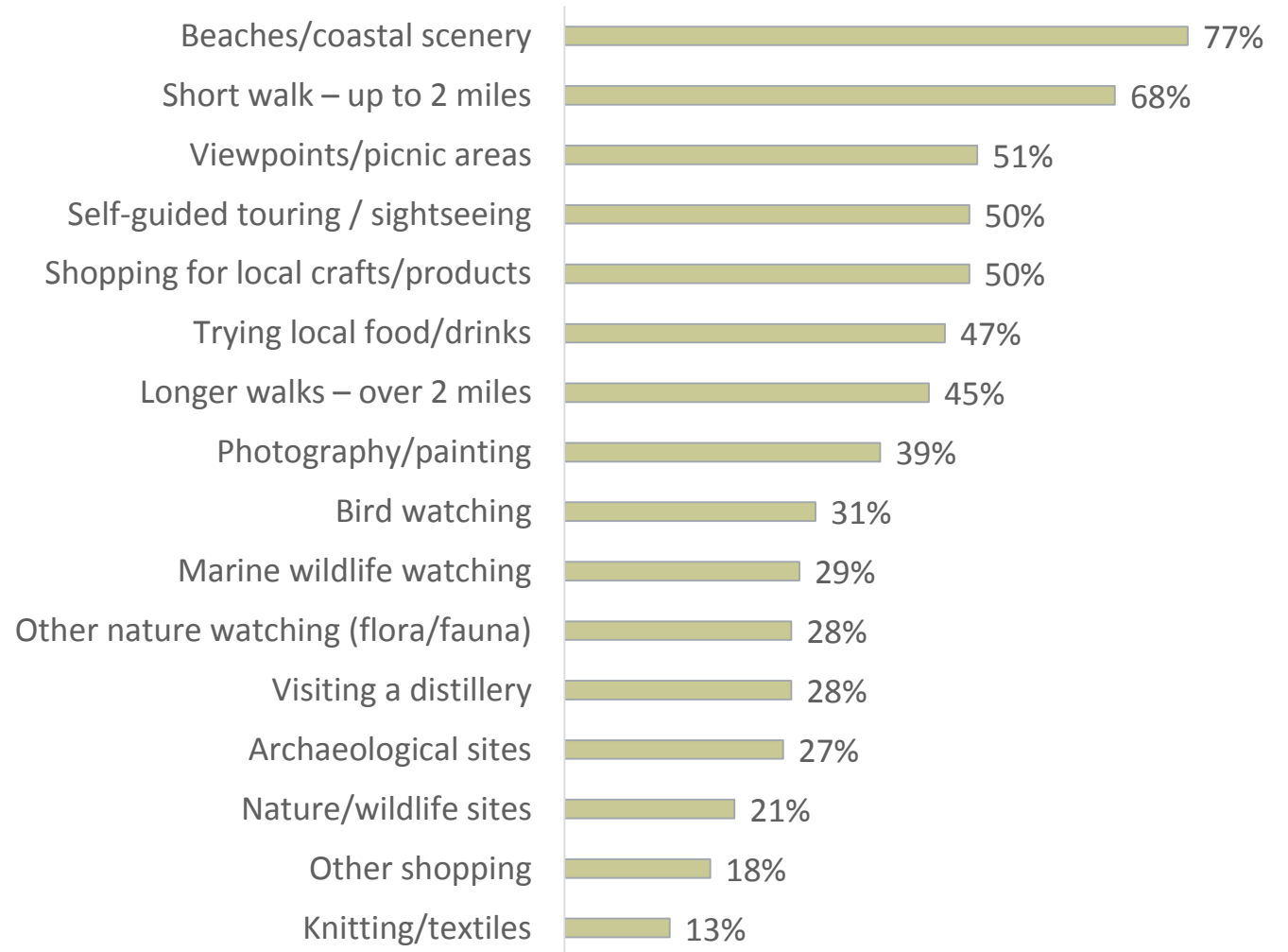
Q62: Did you take part in any of the following activities during your visit to the Outer Hebrides?

Trip profile

Activities

- A wide variety of activities were undertaken.
- Over three quarters of Leisure visitors went to beaches/coasts and over two thirds (68%) took shorts walks.
- Visiting viewpoints and picnic areas was also very prevalent (51%). Half of Leisure visitors also mentioned sightseeing and shopping for local crafts and produce.

Top activities on Outer Hebrides in detail - Leisure visitors



Q62: Did you take part in any of the following activities during your visit to the Outer Hebrides?

Base (All Leisure): 525

Trip profile

Activities

- The activities noted on this chart show those selected by smaller numbers of Leisure visitors. These tended to be niche activities, such as music, cycling and other specific sports.
- 7% of Leisure visitors mentioned going to a local festival or event. These events included Hebridean Celtic Festival, Eilean Dorcha Festival, Ceolas, Highland Games or Harris Mountain Festival.

Other activities on the Outer Hebrides - Leisure visitors

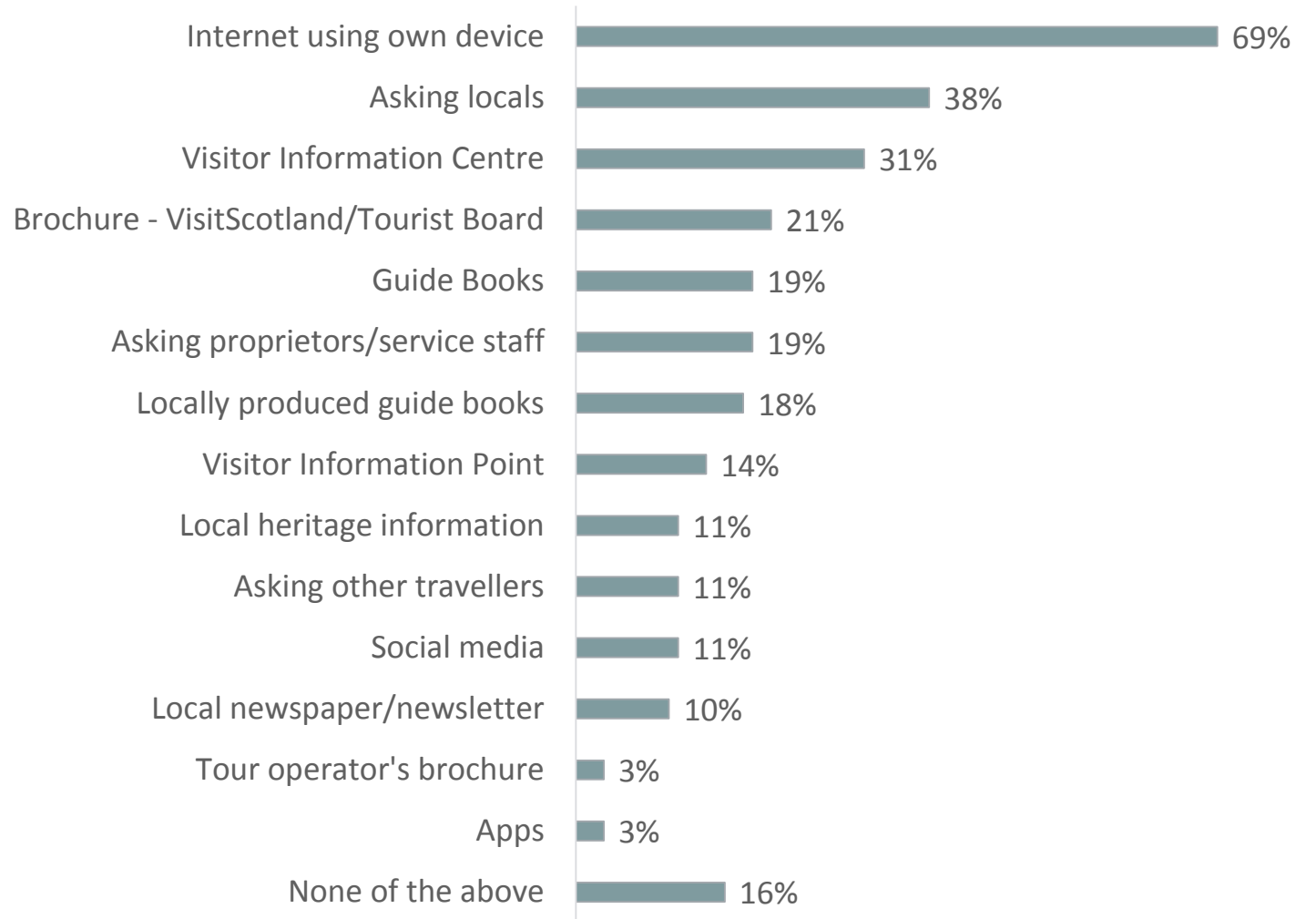


Trip profile

Information

- As well as being the main source of information when planning a trip to the Outer Hebrides, the Internet was also the main source of information during the trip.
- Almost two fifths stated they asked the locals for information.
- Visitor centres were also widely utilised, with 31% of all visitors mentioning this as a source of information. As we would expect, Leisure visitors were more likely to use visitor centres (39%) than VFR (10%) or Business (9%) visitors.
- In fact, higher proportions of Leisure visitors used almost all information sources than VFR or Business visitors. A full breakdown of the information sources used by Leisure visitors is detailed over.
- The Apps used included VisitScotland, Visit Outer Hebrides, TripAdvisor, Google and Magic Seaweed (surf conditions).

Sources of information during trip to the Outer Hebrides



Base (All, excluding rotational shift workers): 648

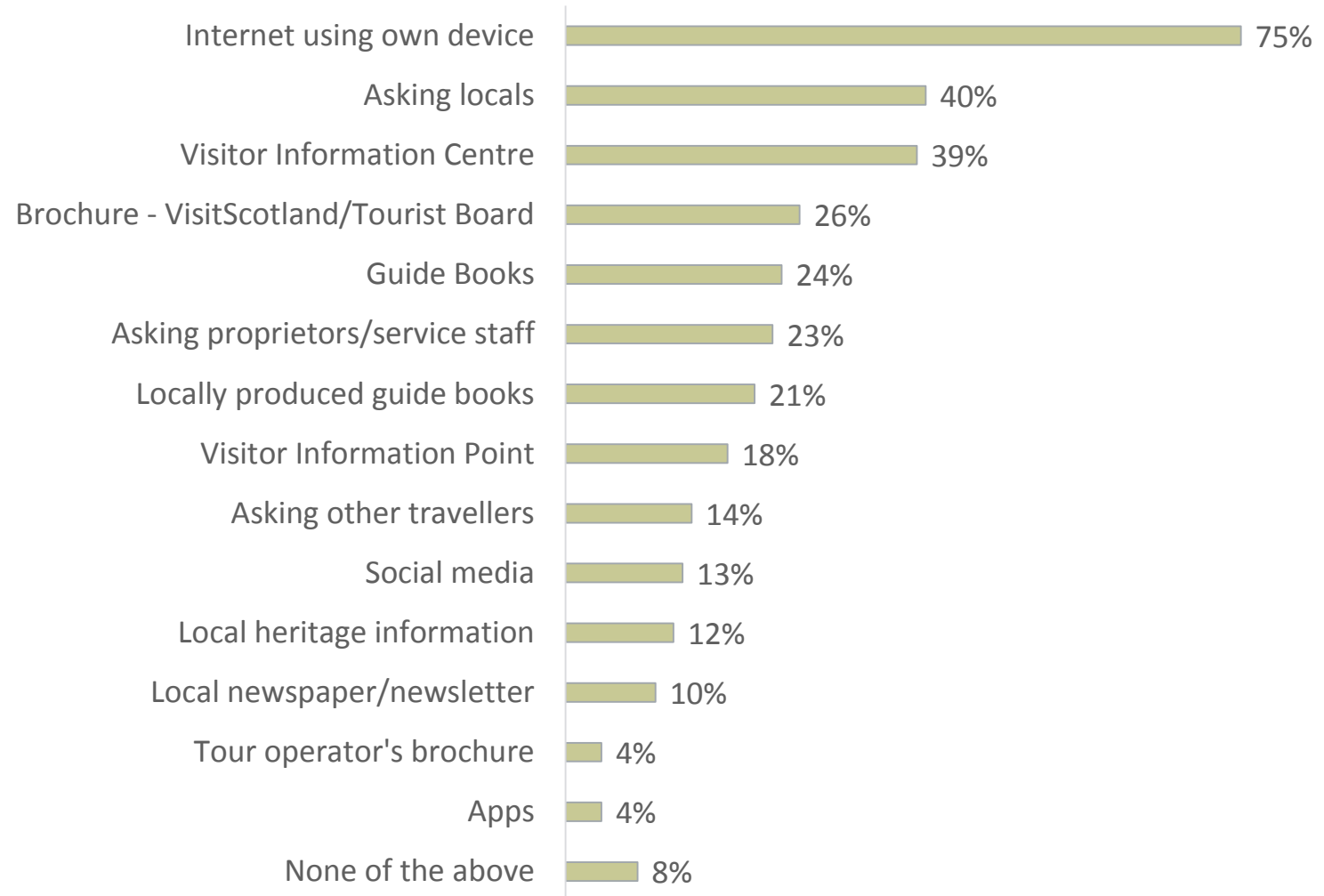
Q64: During your recent visit to the Outer Hebrides which of the following methods did you use to obtain information about places to visit and things to do?

Trip profile

Information

- A wide range of sources of information were accessed by Leisure visitors, with many using more than one.
- Accessing the internet was the most prevalent way of looking for information during their trip for Leisure visitors (75%), followed by asking locals (40%) and going into visitor information centres (39%).
- Higher proportions of rest of UK and overseas visitors used visitor information centres (rest of UK 42%; overseas 50%) than Scotland visitors (31%).
- Those from overseas were more likely to use VisitScotland/tourist board brochures (overseas 35%; rest of UK 24%; Scotland 23%) and guide books (overseas 42%; rest of UK 27%; Scotland 11%).
- Overseas visitors (21%) and those from the rest of UK (16%) were more likely to ask other travellers than those from Scotland (8%).

Sources of information during trip to Outer Hebrides – Leisure visitors



Q64: During your recent visit to the Outer Hebrides which of the following methods did you use to obtain information about places to visit and things to do?

Base (All Leisure): 525

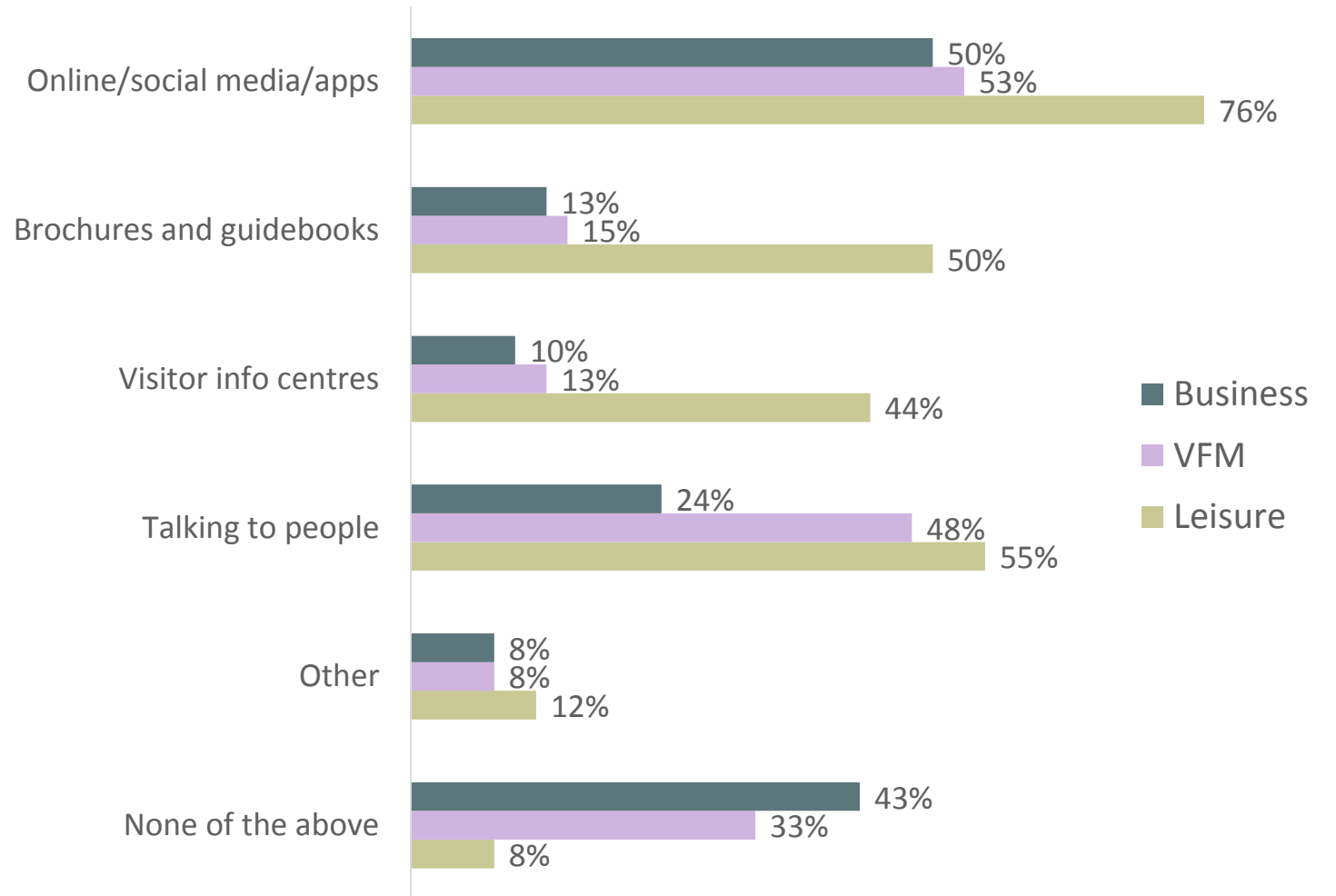
Trip profile

Information

- The types of information used during the trip have been grouped here to show key differences between the visitor types.
- Generally Leisure visitors are more likely to use multiple sources, including online/social media/apps (76%), brochures/guidebooks (50%) and visitor information centres (44%).
- Leisure and VFR visitors were almost equally likely to talk to people to source information. For both groups, this is most likely to be asking local people (Leisure 40%; VFR 42%)
- Amongst Leisure visitors, younger respondents (89% of under 35s) were more likely to use online sources than those in older age groups (66% of over 65s).



Sources of information during trip to the Outer Hebrides



Base (All, excluding rotational shift workers):
Leisure 525; VFR 60; Business 63

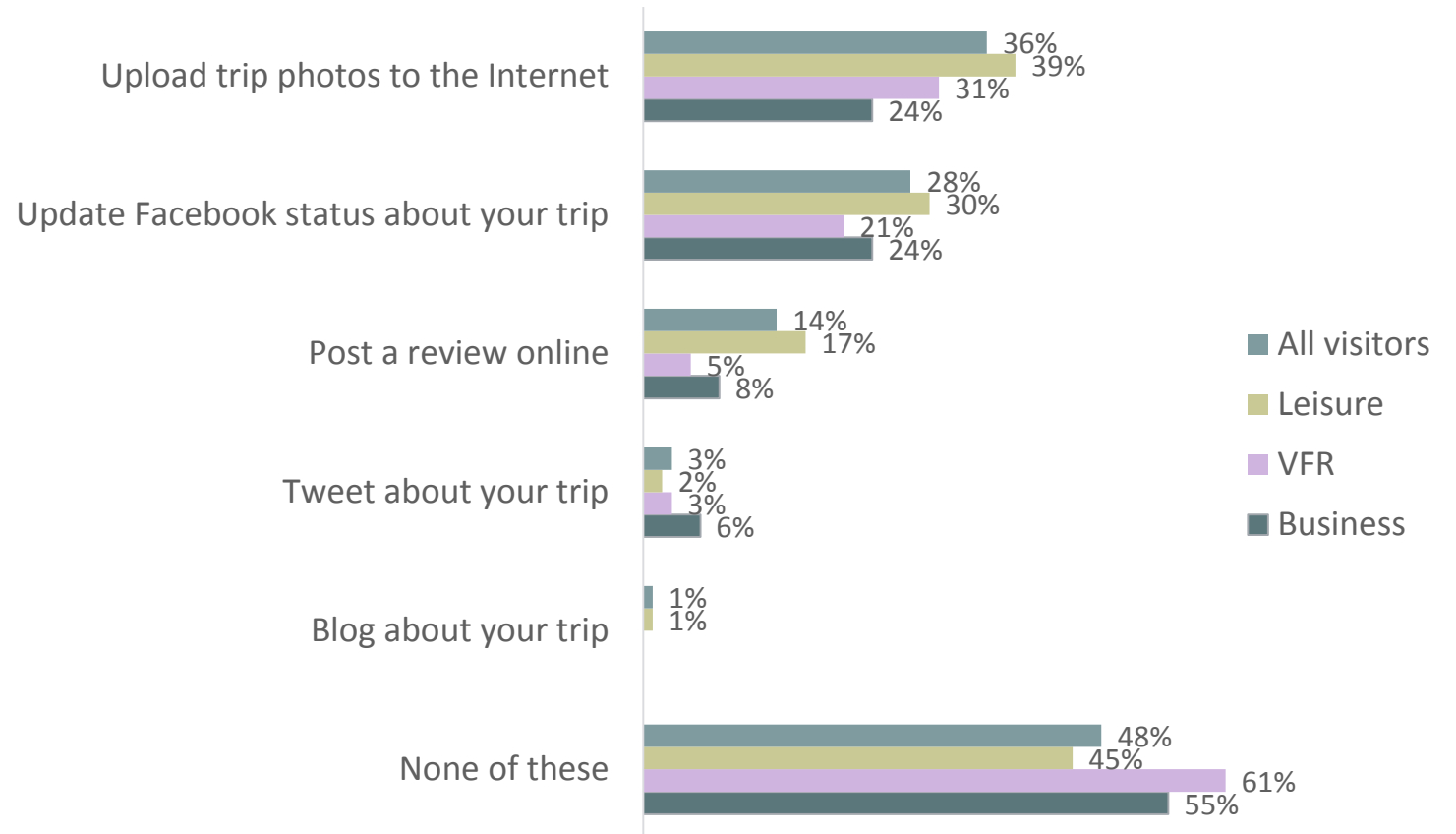
Q64: During your recent visit to the Outer Hebrides which of the following methods did you use to obtain information about places to visit and things to do?

Trip profile

Information

- In total, 52% of visitors reported engaging in online or social media activity about their trip to the Outer Hebrides. This proportion varied by visitor type – 55% of Leisure visitors, compared to 39% of VFR and 45% of Business.
- The most often cited activity (36% of visitors) was uploading trip photos to the internet (e.g. to Facebook), while a further 28% reported updating their Facebook status in relation to the trip.
- Overall, 14% reported that they had posted an online review. Amongst Leisure visitors the proportion was one in six (17%).
- No significant differences by origin were noted for Leisure visitors.
- Respondents under 45 years old were the most likely to cite online or social media activity (71%). In particular, younger age groups were more likely to upload trip photos to the internet (58% - under 45s) compared to the older age groups (19% - 65+).

Online / social media activity during or after trip to the Outer Hebrides



Base (All, excluding rotational shift workers):
Total 648; Leisure 525; VFR 60; Business 63

Qualitative Findings

During the trip



In line with the quantitative findings, qualitative respondents were very comfortable asking the locals for advice.

We didn't look into anything while we were there (online) but we did ask locals and everyone was very friendly.

People at the ferry terminal were amazing as well with suggestions and direction.

Everywhere we stopped had those very useful "Brown signs" and everything else was in our guide book.

The local tweed shop was lovely with some guidance and the guest house owners also provided lots of hints and tips, as they didn't provide any leaflets.

There was not much open in way of information points when we were there.

We had absolutely no need for mobiles as we had everything we needed and we even got some hints and tips from other people staying at the campsites.

Trip profile

Summary



Leisure visitors

- 97% were staying overnight – overnight visitors typically stayed for 1 to 3 nights (37%) or 4 to 7 nights (45%).
- Most popular accommodation was self-catering (34%) followed by B&Bs (29%) and hotels (24%). The number of nights spent was highest for self-catering accommodation (ave. 7.6 nights) and lowest for hotels (ave. 4 nights).
- Travel around the islands was typically by car.
- Almost half were visiting as a couple, with their partner/spouse. Just over a quarter were in family groups and 15% were travelling alone. Just less than 1 in 10 had children under 16 years old in their group.
- The top attraction in Lewis was the Callanish Stones and the top attraction in Harris was the Harris Distillery.
- The top activities were walking, enjoying the beautiful scenery, visiting the beaches and other specific activities such as guided tours, shopping and enjoying local food and drink.
- Most reported finding information online during their trip, although 44% had also visited a visitor information centre.

VFR Visitors

- Almost all (98%) were staying overnight – 34% for 1 to 3 nights; 47% for 4 to 7 nights.
- Three quarters stayed with friends or relatives.
- Just over a quarter (27%) were travelling alone; 33% with their partner/spouse and 33% in a family group. 20% reported that they had children in their group.

Business visitors

- Higher proportion of day visitors (16%) than other visitor types. Overnight visitors tended to stay for less than 3 nights (71%).
- Most travel alone (74%) and stayed in a hotel (55%).
- The majority visited Lewis (72%), while 35% visited Harris and just under a quarter (24%) visited Benbecula.



Evaluation of trip experience

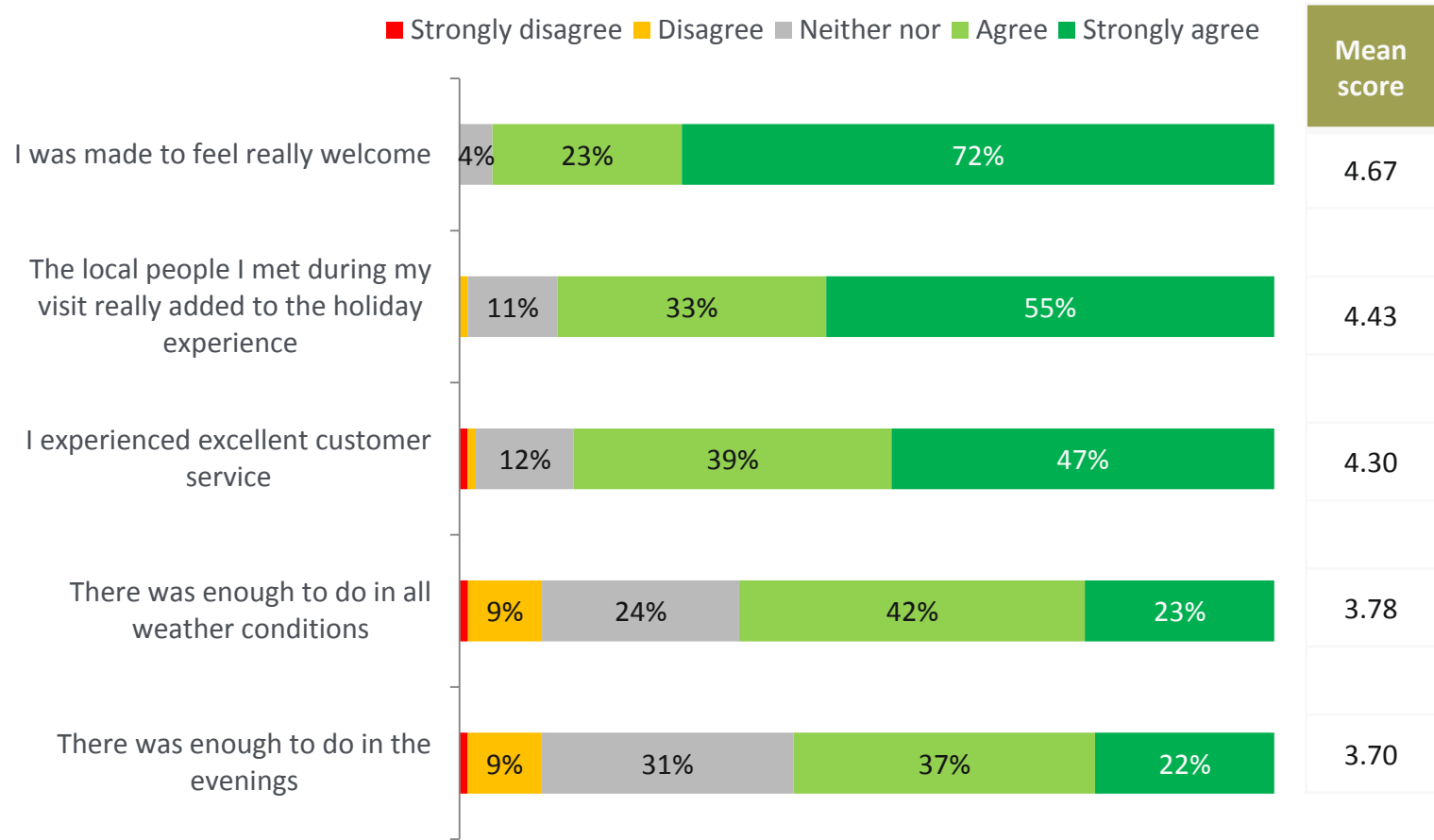
Trip evaluation

Overall experience

- When asked to agree or disagree with a series of statements about their visit to the Outer Hebrides, the majority of Leisure/VFR visitors provided positive responses.
- The strongest levels of agreement were noted for statements around interactions with local people in Outer Hebrides, for example, being made to feel welcome, local people adding to the holiday experience, and customer service. Over 86% of respondents agreed with these statements with the larger proportions agreeing strongly.
- Agreement was weaker for the range of things to do in all weather conditions and in the evenings. However, most respondents did agree with these statements, indicating that generally visitors were satisfied with these aspects of their trip.



Agreement with statements about experience – Leisure/VFR



Base (All Leisure/VFR excluding 'don't know' responses): 503 – 585

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

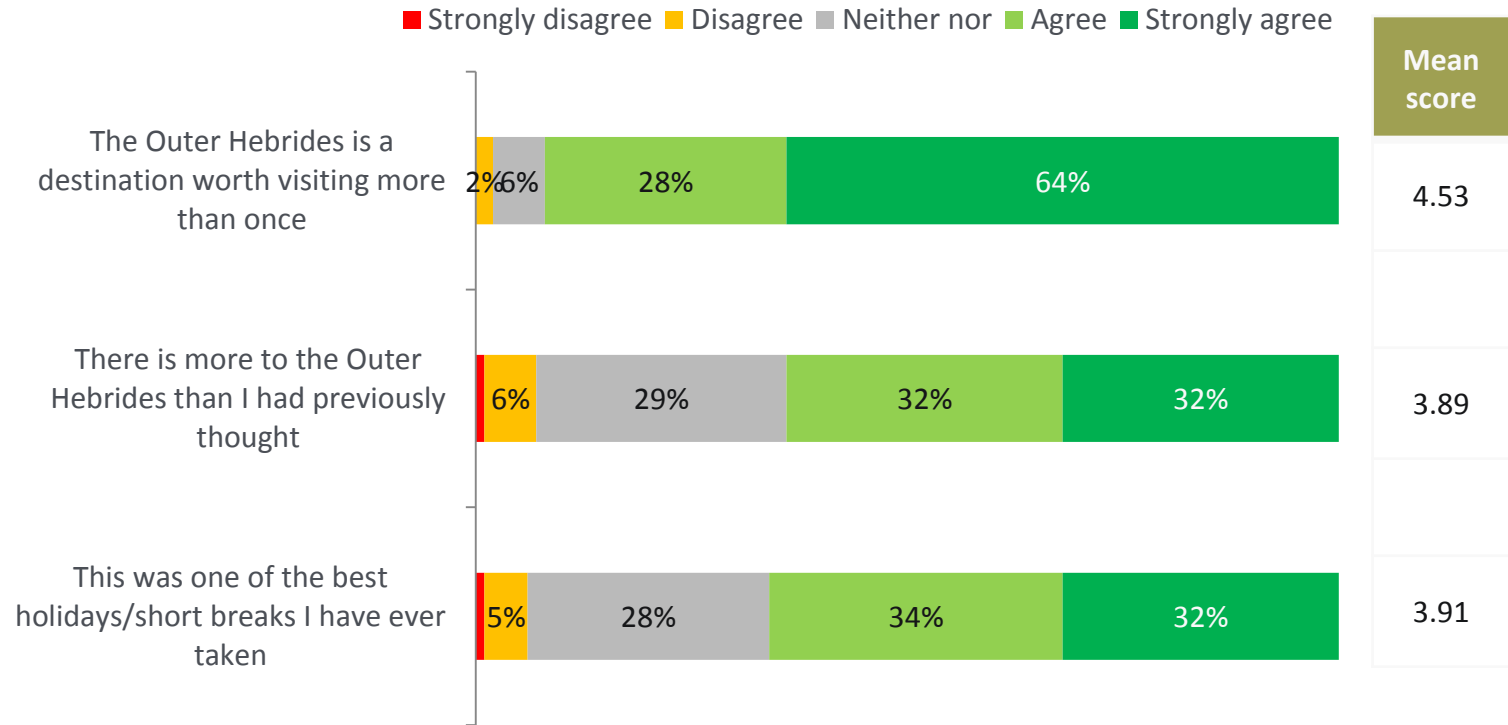
Q66: Thinking of your experience in the Outer Hebrides overall, to what extent do you agree or disagree with the following statements?

Trip evaluation

Overall experience

- Reflecting the positive experience the majority of visitors had on their trip to the Outer Hebrides, 92% agreed that it is a destination worth visiting more than once (64% agreed strongly).
- Indeed, 64% agreed that there is more to the Outer Hebrides than they had previously thought before visiting.
- Two thirds overall, agreed that their trip had been one of the best holidays or short breaks they had ever taken, with opinion evenly split between those who agreed strongly and agreed.
- Leisure visitors were more likely to strongly agree with this statement (34%) than VFR visitors (21%).

Agreement with statements about experience – Leisure/VFR



Base (All Leisure/VFR excluding 'don't know' responses): 521 - 567

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

Trip evaluation

Overall experience – sub-sample analysis



- There were very few differences in agreement ratings by visitor type
- European Leisure visitors tended to be less positive about a couple of specific points. They were less likely than other visitors to agree strongly that there was enough to do in the evenings (8%). They tended to be less likely to agree strongly (48%) that the Outer Hebrides is worth visiting more than once.
- Female Leisure visitors were more positive than males as they were more likely to agree that they:
 - There was enough to do in all weathers – Females 71%, Males 61%
 - The local people they met during the visit added to the experience – Females 91%, Males 85%
 - It was one of the best holidays they have ever taken – Females 72%, Males 63%

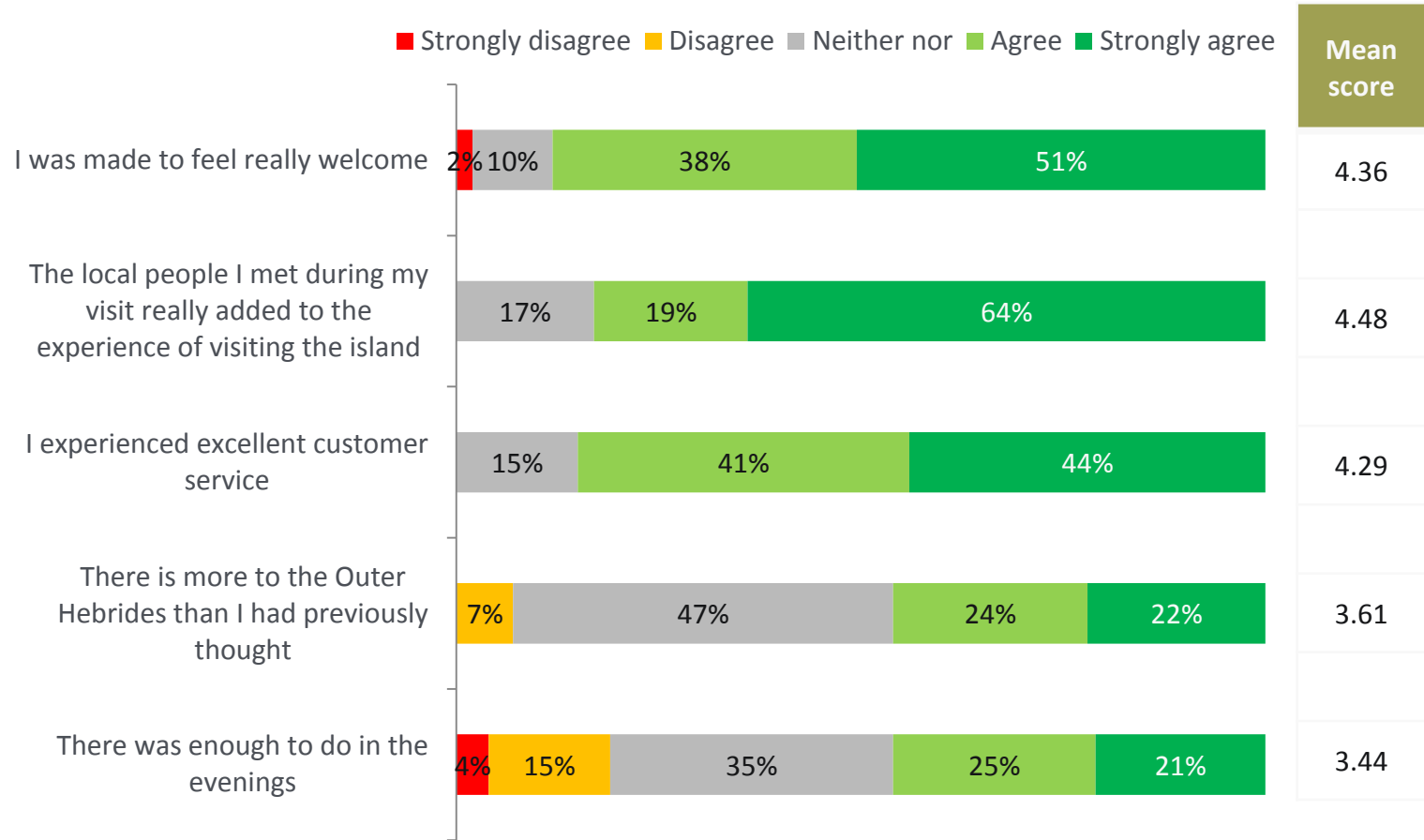
Trip evaluation

Overall experience

- The pattern of response across the Business visitors corresponded closely to the response from Leisure and VFR visitors.
- High levels of agreement were expressed by Business visitors regarding the positive impact of local people on their visit to the Outer Hebrides and the customer service.
- Business visitors were less positive about having enough to do in the evenings, with only 46% agreeing with this statement. the same proportion also agreed that there is more to the Outer Hebrides than previously though.



Agreement with statements about experience – Business visitors



Base (All Business excluding rotational shift workers and 'don't know'): 52 - 82

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

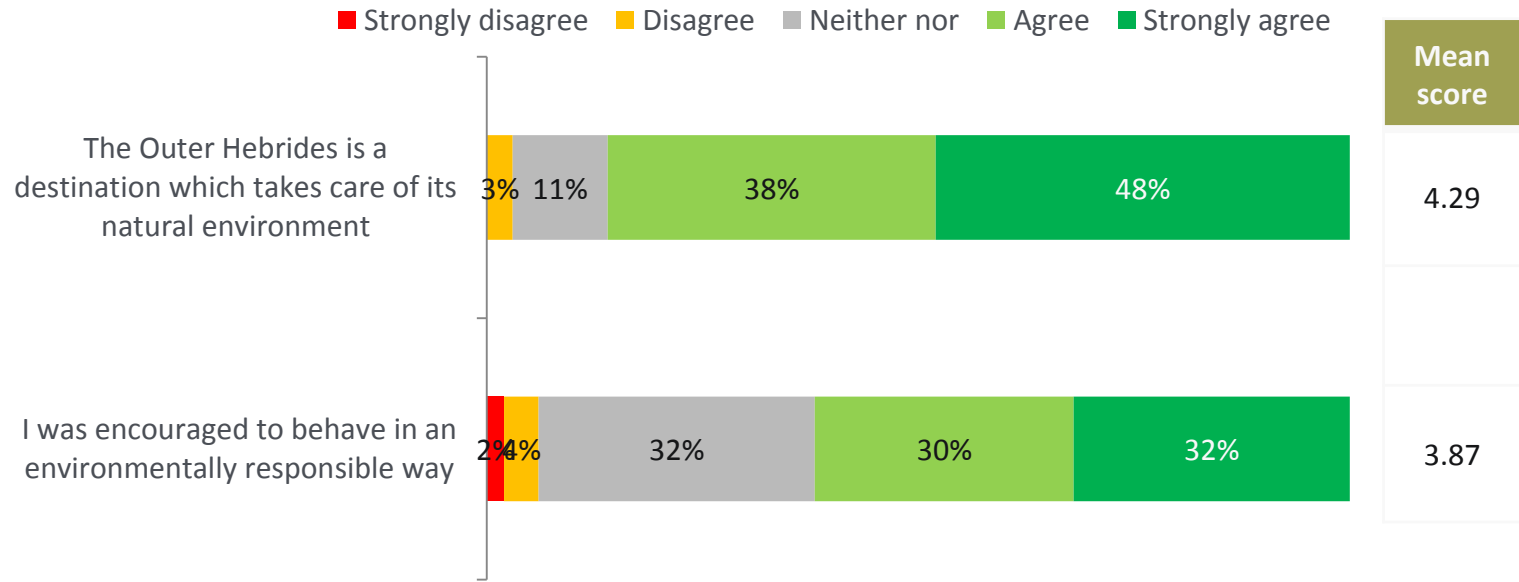
Q66: Thinking of your experience in Outer Hebrides overall, to what extent do you agree or disagree with the following statements?

Trip evaluation

Environment

- The majority of visitors shared a perception that the Outer Hebrides is an environmentally responsible destination.
- Overall 86% of visitors agreed that Outer Hebrides takes care of its natural environment, with 48% agreeing strongly. This perception was consistent across Leisure, VFR and Business visitors.
- 62% of visitors also agreed that they themselves were encouraged to behave in an environmentally responsible way. Agreement for this statement was higher amongst Leisure (66%) and VFR (55%) visitors than for Business visitors (45%).

Agreement with statements about experience - Environment



Base (All excluding rotational shift workers and 'don't know'): 610 – 617

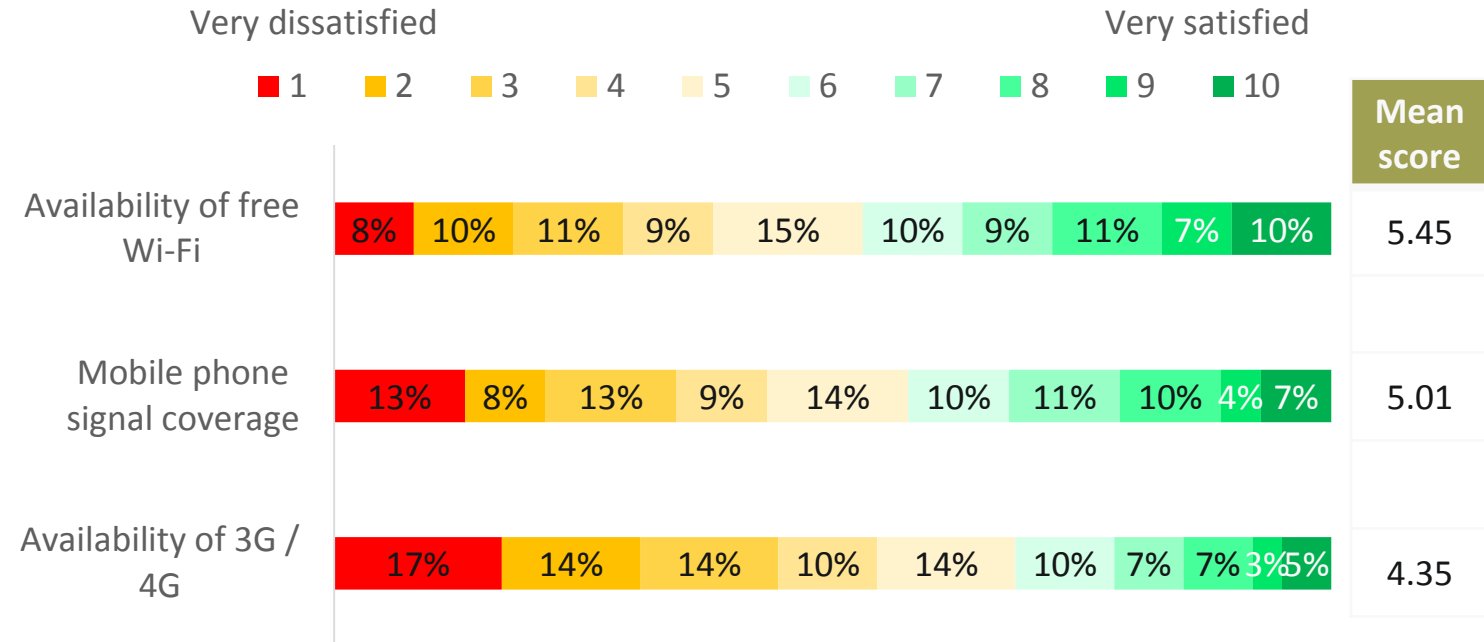
Mean score calculated, whereby 1 is strongly disagree and 5 is strongly agree.

Trip evaluation

Digital coverage

- The research data suggests some concern about digital coverage in the Outer Hebrides.
- There was a split in opinion regarding the availability of free Wi-Fi on Outer Hebrides, with 47% providing a score of 6 or more and 53% scoring 5 or less – suggesting some scope for improvement.
- A higher proportion of visitors rated mobile phone signal coverage 5 or less (57%) again suggesting a need for improvement.
- The area of greatest concern was the availability of 3G/4G on the islands - 69% of visitors scored this 5 or less.

Satisfaction with digital coverage



Base (All excluding rotational shift workers and 'don't know'): 541 - 615

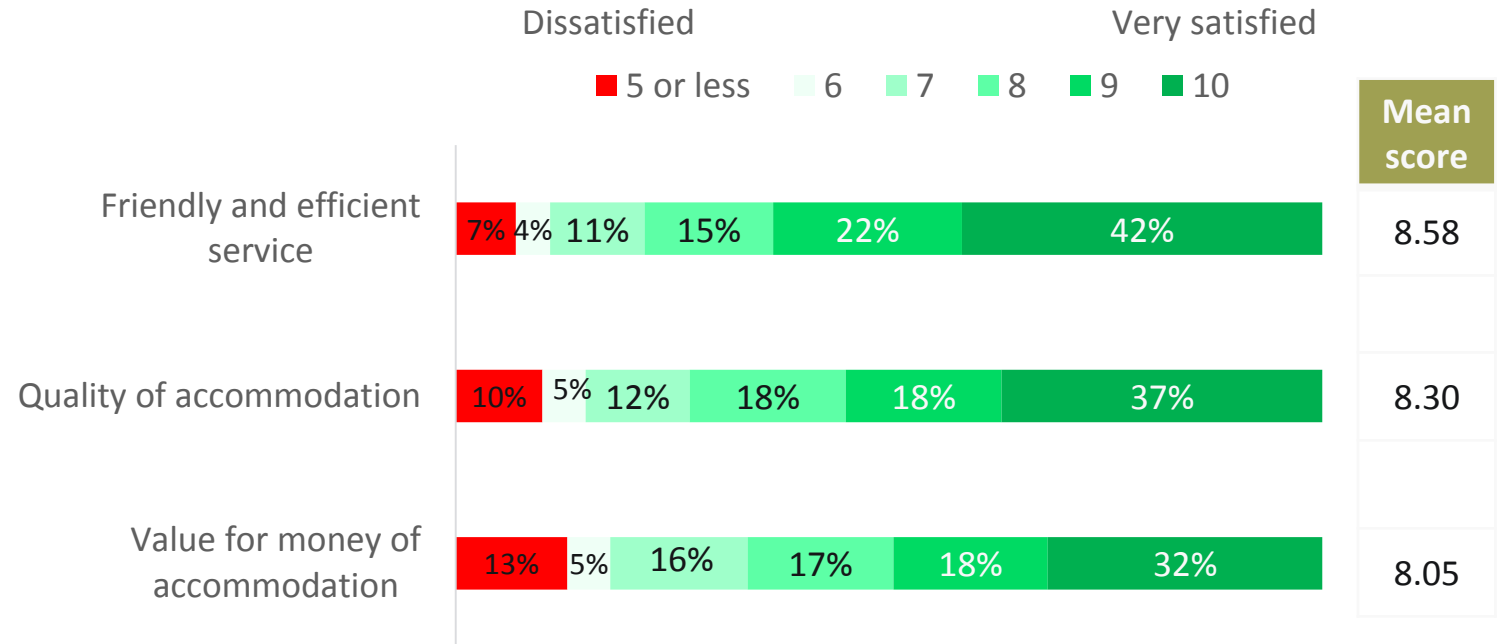
Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

Trip evaluation

Accommodation

- In general, visitors were satisfied with the quality, value for money and service received at their accommodation. In particular, the majority (64%) gave a score of 9 or 10 out of 10 for a friendly and efficient service.
- There was some minority concern (around 1 in 10 visitors) about the quality and value for money of accommodation.
- Satisfaction tended to be higher for Leisure and VFR visitors than for Business visitors.

Satisfaction with accommodation - Total Outer Hebrides



Base (All staying in paid accommodation excluding 'don't know'): 658 - 670

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

Q68: Thinking about the accommodation you stayed in, how satisfied were you with the following aspects of your accommodation?

Trip evaluation

Accommodation

- The scores provided for individual islands for accommodation were also provided by visitors. The mean scores detailed opposite show these for islands where the base size is sufficiently large for analysis.
- Visitors to all of the islands provided very positive scores in terms of quality, service and value for money. Accommodation on Harris and North Uist was scored slightly higher than other islands.

Satisfaction with accommodation - By island (mean scores)



	Lewis	Harris	North Uist	South Uist	Barra
Friendly and efficient service	8.44	8.78	8.77	8.31	8.63
Quality	8.19	8.59	8.67	7.87	8.12
Value for money	7.90	8.25	8.32	7.76	8.12

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

Base (All staying in paid accommodation): Lewis 280; Harris 152; North Uist 64; South Uist 69; Barra 83

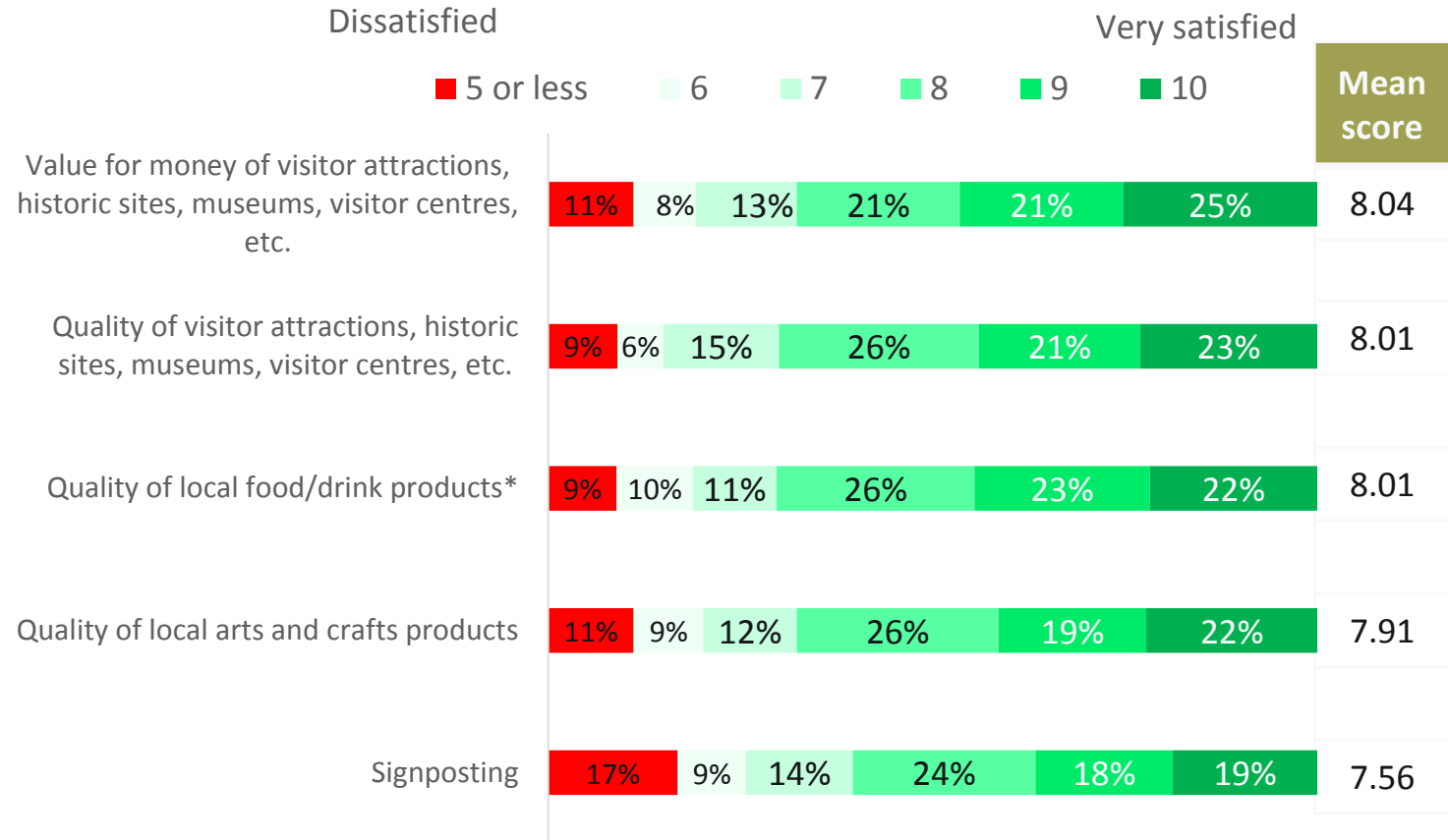
Q68: Thinking about the accommodation you stayed in, how satisfied were you with the following aspects of your accommodation?

Trip evaluation

Satisfaction with aspects of trip

- The majority of visitors were satisfied with all aspects of their trip to the Outer Hebrides. The top three aspects listed opposite attracted mean scores of over 8 out of 10 in terms of satisfaction.
- The highest scoring element was the value for money of visitor attractions, historic sites, museums, etc. – 46% of visitors scored this with 9 or 10 out of 10. These attractions were also thought to be of high quality (44% scoring 9 or 10).
- Indeed, very similar high scores were also provided for the quality of local food/drink, the quality of local arts/crafts products and signposting.

Satisfaction with key aspects of trip



*Includes business visitors.

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

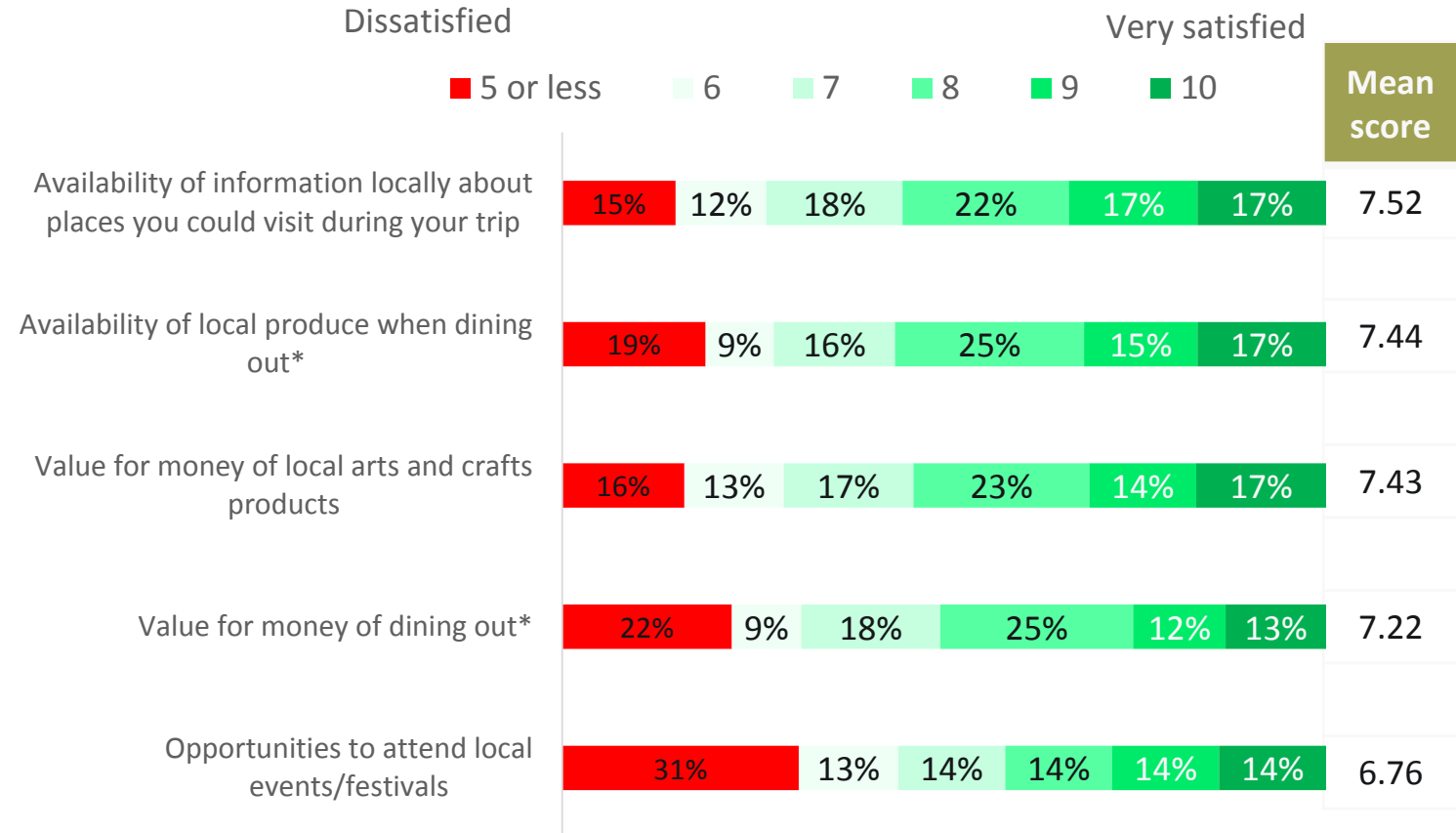
Base (All, excluding 'don't know'): 431 – 525

Trip evaluation

Satisfaction with aspects of trip

- The aspects detailed here attracted slightly lower scores than the previous chart, however, the assessment of each remains very positive – almost all score more than 7 out of 10 on average.
- One of the lowest scores was for opportunities to attend local events and festivals – although this opportunity would clearly be limited by whether any events were on at the time of the visit.
- The value for money of dining out was also scored slightly lower compared to some other aspects, suggesting that, for some, eating out was expensive.

Satisfaction with key aspects of trip



*Includes business visitors.

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

Base (All, excluding 'don't know'): 292 – 591

Trip evaluation

Satisfaction with aspects of trip – sub-sample analysis



- Amongst Leisure visitors, there were very few differences in the level of satisfaction with the different aspects of the trip between the various visitor groups. European Leisure visitors were the least likely to rate the various aspects of their trip as 10 out of 10.
- Female respondents tended to state slightly higher levels of satisfaction than males. For example, 45% of females gave a score of 10 out of 10 for the quality of accommodation compared to 33% of males.

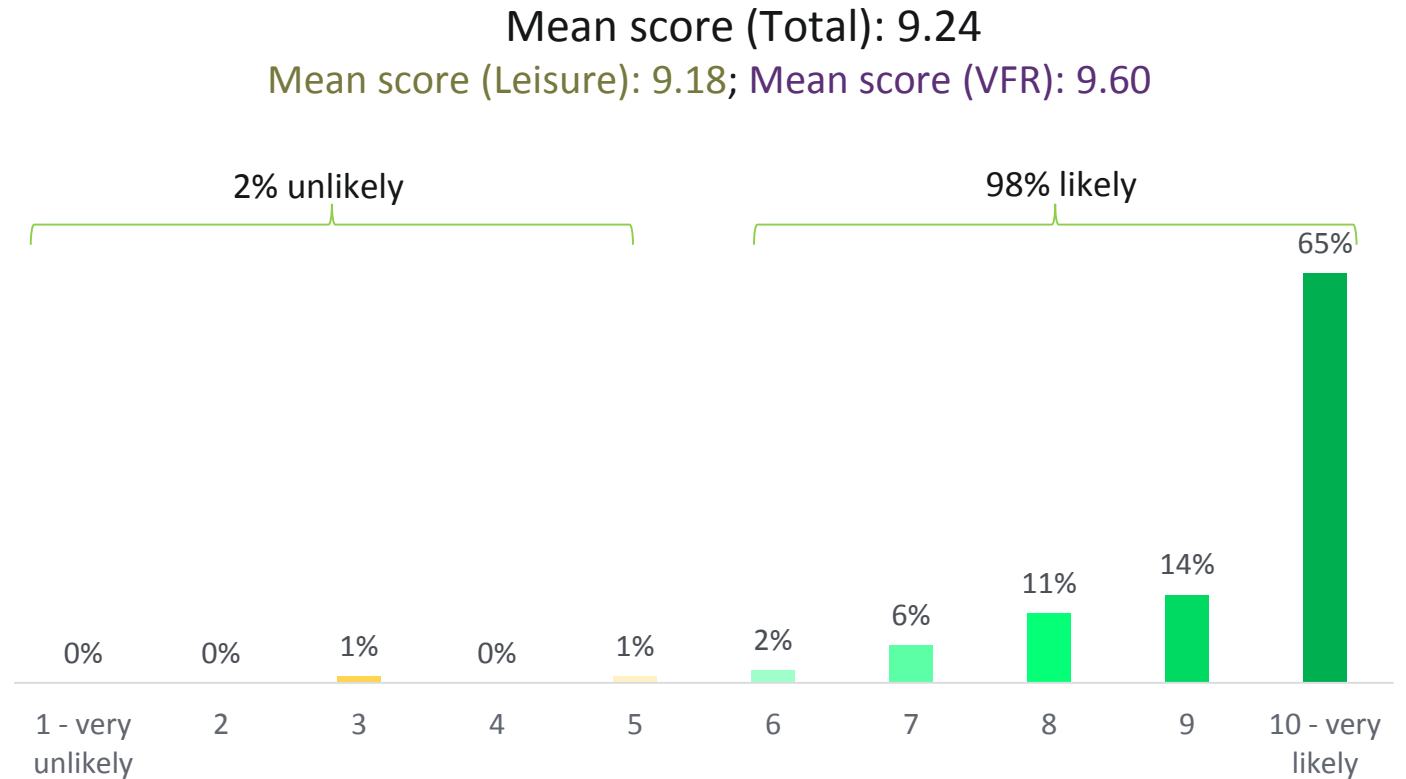
Trip evaluation

Recommendation

- The positive attitudes of Leisure and VFR visitors is confirmed in the finding that the majority would recommend the Outer Hebrides as a holiday or short break destination. Indeed, 65% gave a perfect 10 out of 10 promotion score.
- Findings were similarly positive for both Leisure and VFR visitors, however, VFR visitors were more likely to provide a score of 10 (77%, compared to 63% of Leisure visitors).
- For Leisure visitors, those most likely to score 10 out of 10 were visitors from Scotland (68%) followed by those from the rest of the UK (58%) and finally overseas (59%).
- Females were more likely to score 10 (67%) than males (58%).



Likelihood to recommend Outer Hebrides as a holiday/short break destination – Leisure and VFR visitors



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

Base (All Leisure/ VFR, excluding 'don't know'): 581

Q70: Based on your experiences during this trip, how likely are you to recommend Outer Hebrides as a holiday or short break destination to friends and family?

Trip evaluation

Return visit

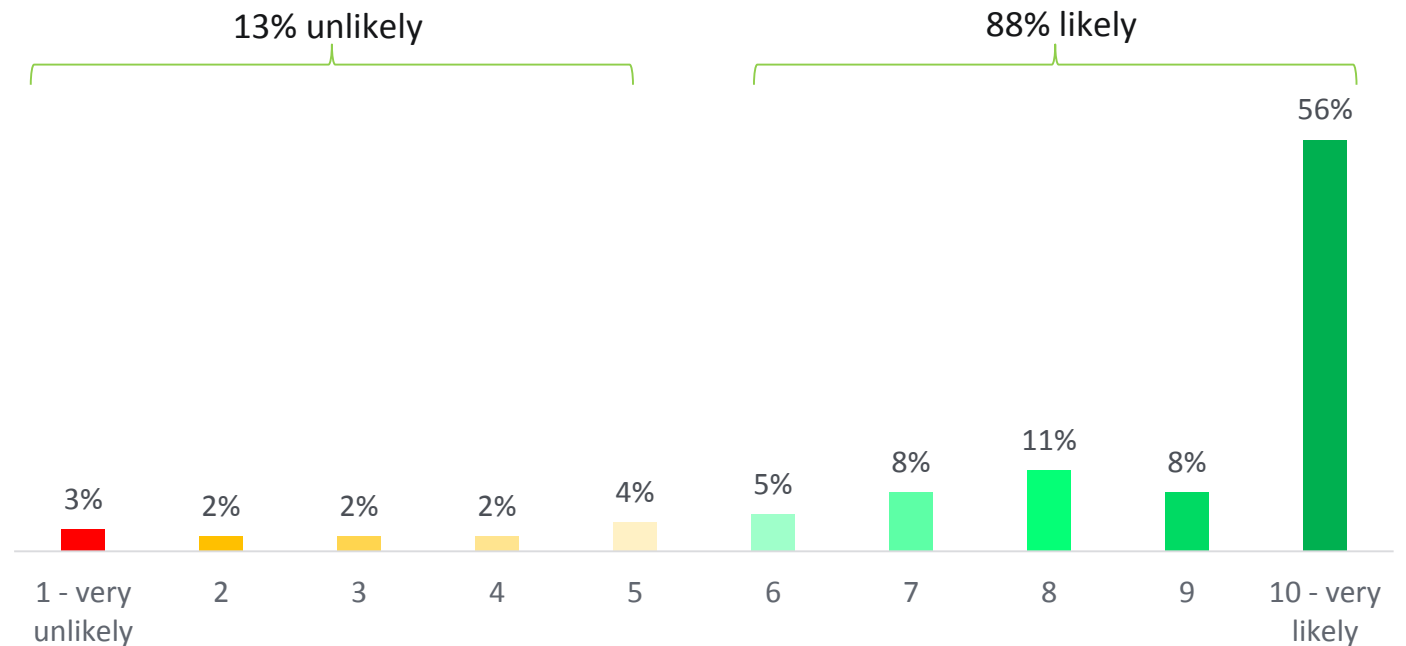
- When asked how likely they were to return to the Outer Hebrides for a short break or holiday in the next 5 years, the majority of visitors responded positively - 88% scored 6 or more out of 10, with 56% scoring 10 out of 10 indicating that it is highly likely.
- Findings did vary by visitor type. As expected VFR visitors were the most likely to anticipate a return visit (87% 10 out of 10). A large proportion of Business visitors also considered it likely – 81% scored 6 or more and 47% scored 10.
- Given the mix of domestic and international visitors within the Leisure sample it is not surprising that propensity to return is slightly lower. However, this group was also strongly weighted to an intention to return, as noted in the data detailed over.

Q71: Based on your experiences during this trip, how likely are you to visit Outer Hebrides in the next five years for a leisure holiday or short break?

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



Mean score (Total): 8.43
Leisure: 8.37; VFR: 9.68; Business 7.81



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

Base (All excluding 'don't know'): 663

Trip evaluation

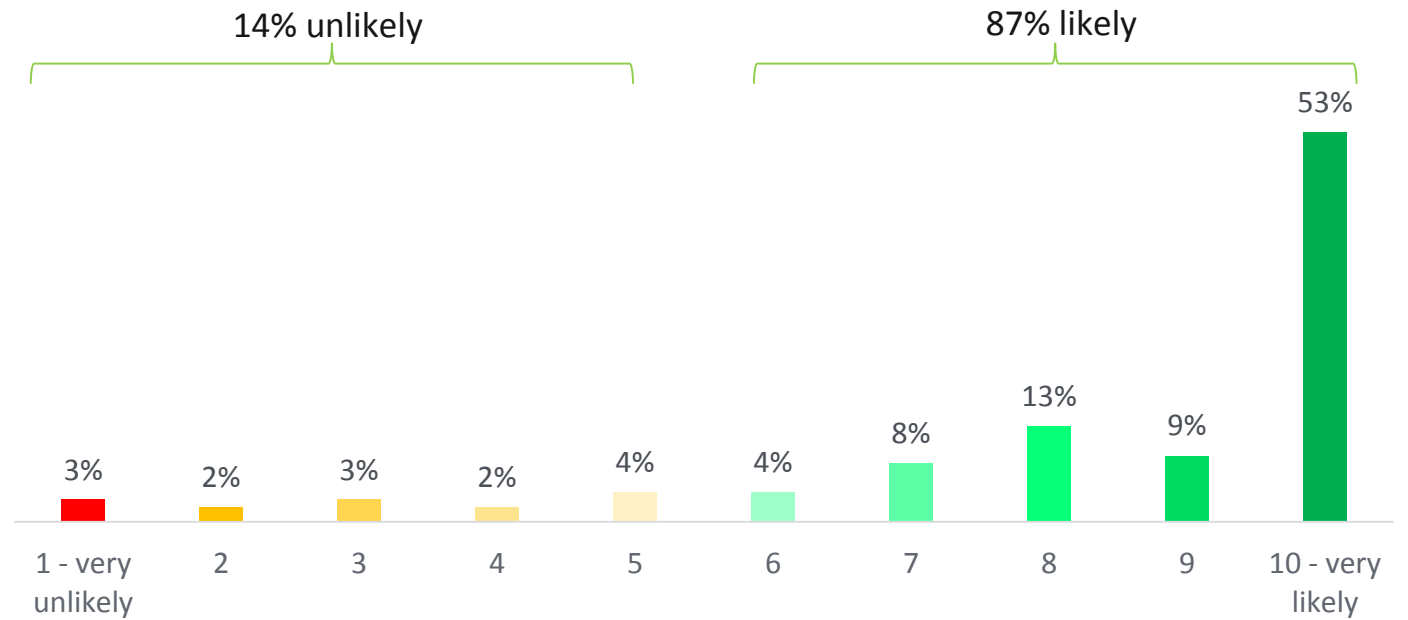
Return visit

- 87% of Leisure visitors gave a score of 6 or more in terms of their likelihood to return to the Outer Hebrides in the next five years.
- As we would expect, visitors from Scotland (66%) and the rest of the UK (54%) were more likely to score 10 out of 10 than those from overseas (25%).



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

Mean score (Leisure): 8.37



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

Base (All Leisure excluding 'don't know'): 510

Q71: Based on your experiences during this trip, how likely are you to visit Outer Hebrides in the next five years for a leisure holiday or short break?

Trip evaluation

Highlight

- When asked about the highlight of their trip specific places such as St Kilda and the Callanish Stones were mentioned, as well the attractions in general.
- Around two fifths also mentioned the landscape and scenery. These visitors were very taken by the scenic, unspoilt views particularly those who were not used to rural locations.
- One third of those who provided a response mentioned beaches. Comments referred to deserted beaches, as well as specific beaches, such as Luskentyre, and Harris beaches in general.
- Just over 1 in 10 also mentioned the local islanders. Some mentioned that their host/hostess at their accommodation made the trip special.

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



Highlights - Open ended question grouped	%
Scenery / beauty / landscape / views	39%
Beaches, lochs	33%
Attraction / specific places e.g. St Kilda, Callanish stones	20%
Nice people / locals / community / Host(ess)	14%
Peace / quiet / relaxation	12%
Other - experience as a whole, cleanliness, general enjoyment, coastal road	11%
Wildlife	10%
Walks	7%
Visiting family / friends	7%
History / archaeology	6%
Good weather	5%
Food	3%
Ferry trip	2%
Fishing	2%
Plane trip	2%
Event e.g. Folk Festival	1%
Fresh air	1%

Trip evaluation

Highlight

- Two fifths of the business visitors said that it was the local community and people that they appreciated the most.
- This was followed by the views and scenery.
- A few mentioned other aspects that were a trip highlight, such as restaurants and food, and the peace and quiet.

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



Highlights - Open ended question grouped	%
Nice people / locals / community	40%
Scenery / beauty / landscape / views	28%
Good weather	14%
Attraction / specific places	14%
Doing business	10%
Peace / quiet / relaxation	10%
Hotel staff	8%
Food	8%
History / archaeology	6%
Good roads	2%
Friends / Family / Home	2%

Trip evaluation

Improvements

- When asked about potential improvements, the main suggestion was improving the internet and mobile phone coverage
- This was followed by better choice of restaurants, particularly in the evening. There was also suggestion to make better use of local produce.
- Other suggested improvements included better signage on the roads and in and around attractions, as well as better opening hours on a Sunday.

Suggested improvements (open-ended)



Suggested improvements - Open ended question grouped	%
Lack of Internet / telephone coverage	21%
Improve, increase restaurants / pubs / food / drink options	15%
Lack of road signs and attraction signs	11%
Opening hours / Sunday opening	11%
Lack of information in general	10%
Travel improvements	9%
Lack of shops	7%
Infrastructure / parking / roads	6%
Accommodation quality	5%
Leisure / things to do	5%
Weather	3%
Bins and litter	3%
Public toilets	3%
Access / attractions being open at all	3%
Large crowds	2%
Accommodation prices	2%
Environmental concerns	2%
Campsites	2%
Midges	1%
Too busy / tourists / cruise ships	1%
Nothing	7%

Qualitative Findings

Improvements



The key improvements from qual respondents ...

On occasion I am not sure that its always obvious how hard it can be to get things on the Islands (opening hours / availability) and some might be caught unaware.

There was limited places to eat. We struggled to stop for coffee or a drink. No real pit stops which we struggled with a bit.

3 or 4 tour buses turned up at one of the sites. It didn't bother us but if popularity increases might be come a concern

We didn't find out our ferry was cancelled until we went to the ferry terminal! Would have been good if we had known about the App. We couldn't get through to Calmac on the phone.

Possibly just being informed in advance about Sunday closures and some of the roads can be quite narrow

Trip evaluation

Negative Experience

- Over one quarter of respondents (29%) made a comment when asked to state if anything had negatively impacted their experience.
- Similar to the suggested improvements, transport was mentioned by around 1 in 10 respondents; for example:
 - Delayed/cancelled flights/ferries
 - Lack of regular flights
 - Lack of bus service / poor Sunday bus service
 - Poor linkage of public transport with ferry and flight times
- Some respondents mentioned a lack of internet and wifi coverage and mobile phone coverage was poor.
- Other issues related to everywhere being closed on a Sunday. Not everyone planned for this.

Negative experience during the visit (open-ended)



Negative experience - Open ended question grouped	%
Lack of Internet / telephone coverage	11%
Transport options / quality	11%
Opening hours / Sunday opening	10%
Lack of local produce, seafood / Lack of choice of restaurants and cafés	9%
Poor quality accommodation	8%
Litter	8%
Local business (bad experience at)	8%
Weather	6%
Information (lack of)	5%
People	4%
Ugly buildings e.g. wind turbines, empty houses	4%
Prices	3%
Drivers	3%
Signs (lack of)	2%
Nothing to do	2%
Midges	2%
Environment	2%
Toilets	2%
Lack of accommodation options	1%
Noise	1%
Transport costs	1%
Road works	1%
Access / attractions not open (season)	1%
Busy / tourists / cruise ships	1%
Roads / paths	1%
Hard to book	1%
Parking / Couldn't get fuel	1%
Other individual comments include: Lack of places to buy Harris Tweed, lack of tourism goods, too many campervans	12%

Base (All who gave a response, excluding rotational shift workers): 186¹⁰⁶

Q76 - Was there anything you encountered during your visit that impacted negatively on your visitor experience?

Trip evaluation

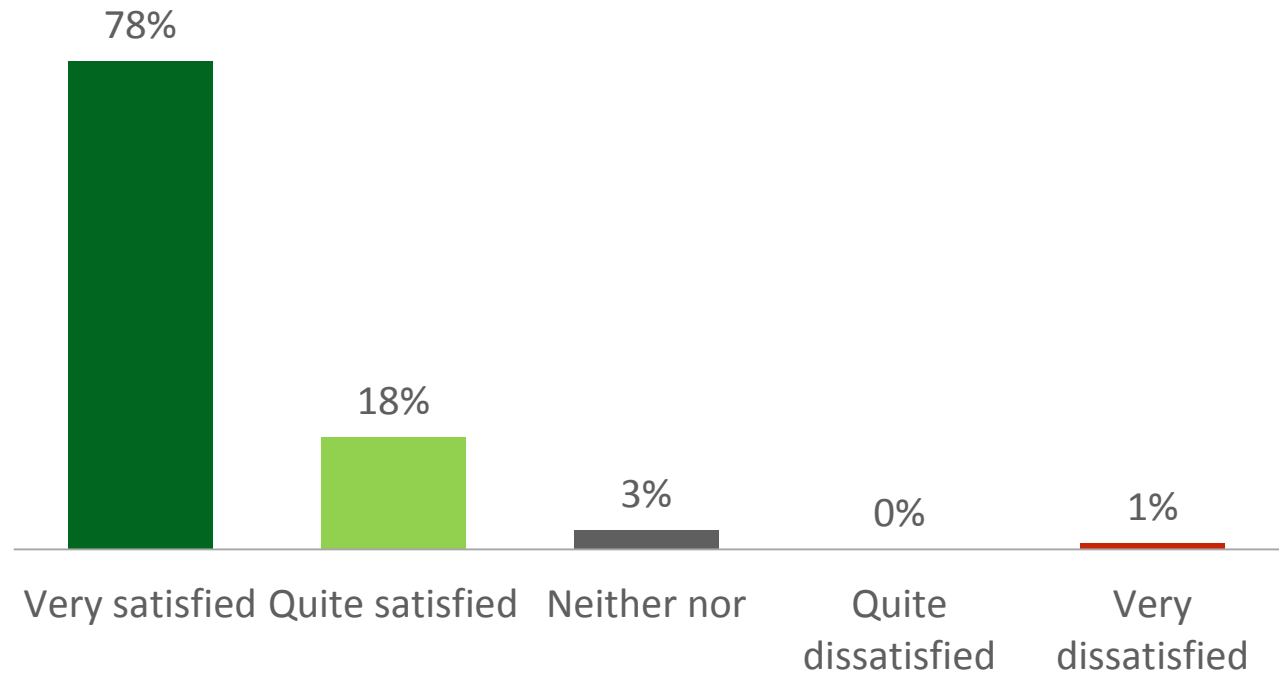
Overall satisfaction

- The positive opinions of visitors to the Outer Hebrides were confirmed when they were asked to rate their overall satisfaction with their trip. In total, 96% reported being satisfied, with 78% stating that they were 'very satisfied'.
- This high level of satisfaction was reflected across all visitor types, however, Leisure and VFR visitors had the highest proportion of 'very satisfied' responses, as detailed over.

Overall, how satisfied were with your trip to the Outer Hebrides?



Mean score: 4.72



Mean score calculated, whereby 1 is extremely dissatisfied and 5 is extremely satisfied.

Base (All): 684

Trip evaluation

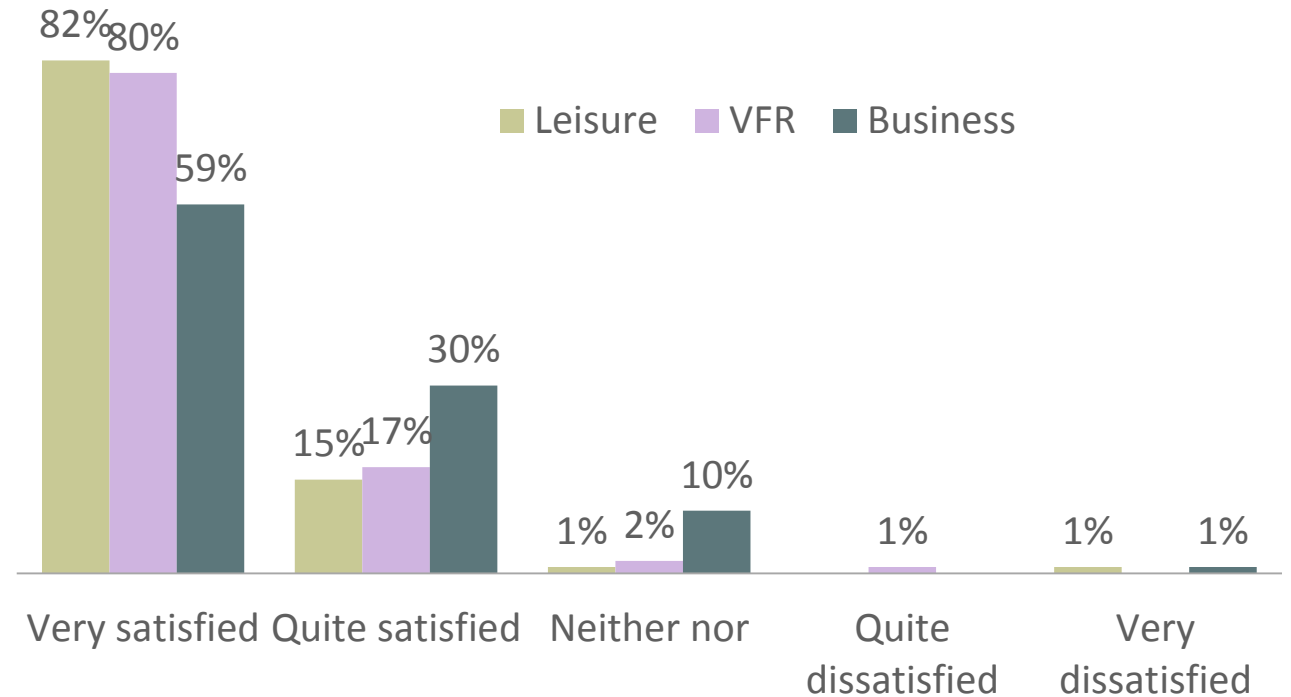
Overall satisfaction

- Leisure and VFR visitors were the most likely to state that they were 'very satisfied' with their trip, while Business visitors were more likely than others to state 'quite satisfied'.
- However, all three visitor groups expressed similarly high levels of overall satisfaction.
- The high levels of overall satisfaction were generally consistent across country of origin for Leisure visitors.



Overall, how satisfied were with your trip to the Outer Hebrides?

Mean scores: Leisure 4.78; VFR 4.76; Business 4.46



Mean score calculated, whereby 1 is extremely dissatisfied and 5 is extremely satisfied.

Base (All): Total 684; Leisure 525; VFR 60; Business 99

Qualitative Findings

Overall Experience



The qualitative respondents were also very positive about their experience

It was a real adventure for walking and climbing but equally a place you could really relax and unwind and allow the children the freedom of technology and a safe place to just run wild.

There is lots more we could have done but really didn't have the time, or at least didn't want to stretch ourselves too much and take away from it being a relaxing holiday. We will be back though!

An Adventure! Refreshing and relaxing!

Taken by its beauty, countryside, friendliness...pleasantly surprised!!

Magical!

We have shared loads of photos on FB and told people it's a great place to go as a family. However I wouldn't recommend it for older people as the ferry ride can be a bit hairy!


Wild and stunning.

Trip evaluation

Summary



- Satisfaction with the experience of visiting the Outer Hebrides was very high.
 - 66% agreed it was one of the best holidays they had ever taken
 - 78% were 'very satisfied' overall
 - 79% scored 9 or 10 in terms of their likelihood to recommend Outer Hebrides as a place to visit
- Interactions with local people were a particular highlight for many visitors – most agreed they were made to feel welcome, the local people really added to their trip and they experienced excellent customer service.
- Around two fifths were first time visitors to the islands, however many expressed an intention to make a return visit to the Outer Hebrides – 75% of Leisure visitors provided a score of 8 or more out of 10 for intention to revisit in the next 5 years; and 64% of Leisure/VFR visitors agreed strongly that the Outer Hebrides is a destination worth visiting more than once.
- The main area of concern was digital coverage, including availability of free Wi-Fi, mobile phone signal coverage and availability of 3G/4G. This was further supported by the open ended comments made.
- Open-ended analysis also suggests that some visitors experienced difficulties with transport and would like to see a wider selection of restaurants and cafes. There were also mentions about the difficulties caused with shops, restaurants and petrol stations not being open on a Sunday.



Volume and value

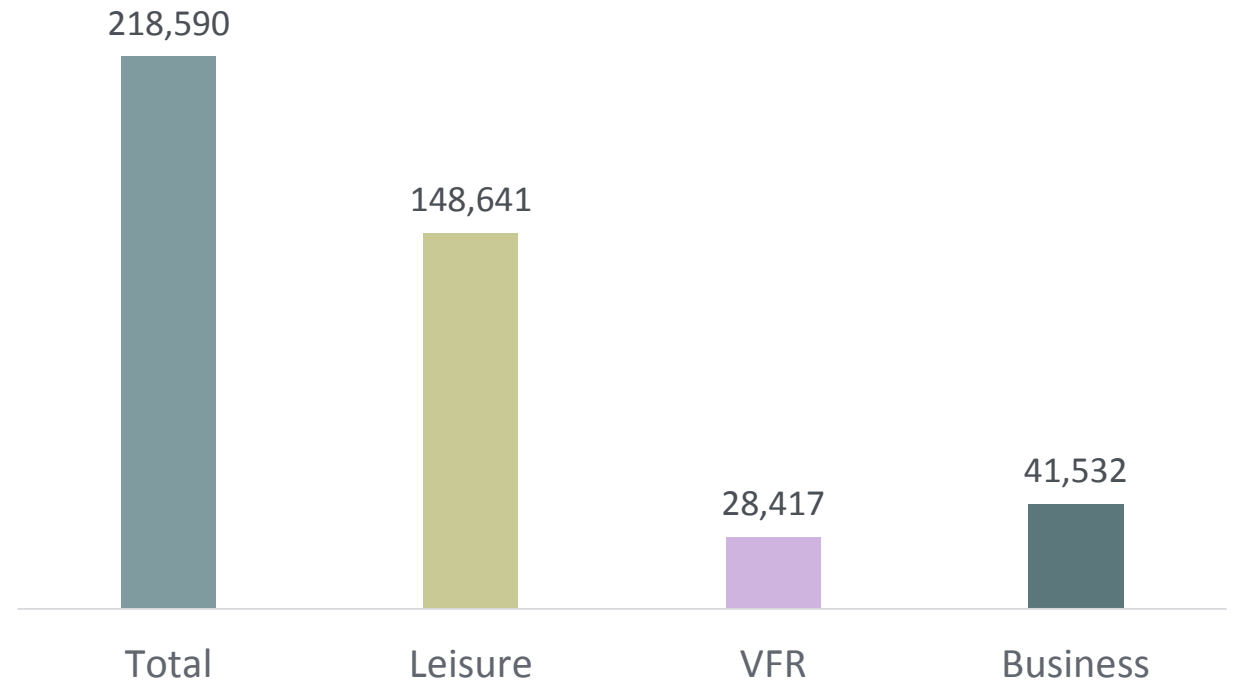
Volume and value

Visit numbers

- Total departing passenger numbers for 2017 were provided by travel operators.
- These figures were used to calculate the total number of visits* to the Outer Hebrides based on the proportion of visitors (versus islanders) measured by the calibration survey per month.
- The total number of visits to the Outer Hebrides in 2017 was 218,590.
- Proportions for Leisure, VFR and Business visits measured by calibration survey were also applied to calculate the number of visits in each of these categories.

*Figures are shown for the number of 'visits' to the islands, rather than the number of 'visitors'. This is because some visitors may make more than one trip over the course of the year. This means that we cannot estimate the number of discrete visitors but can provide estimated data on the number of visits.

Numbers of visits to the Outer Hebrides in 2017

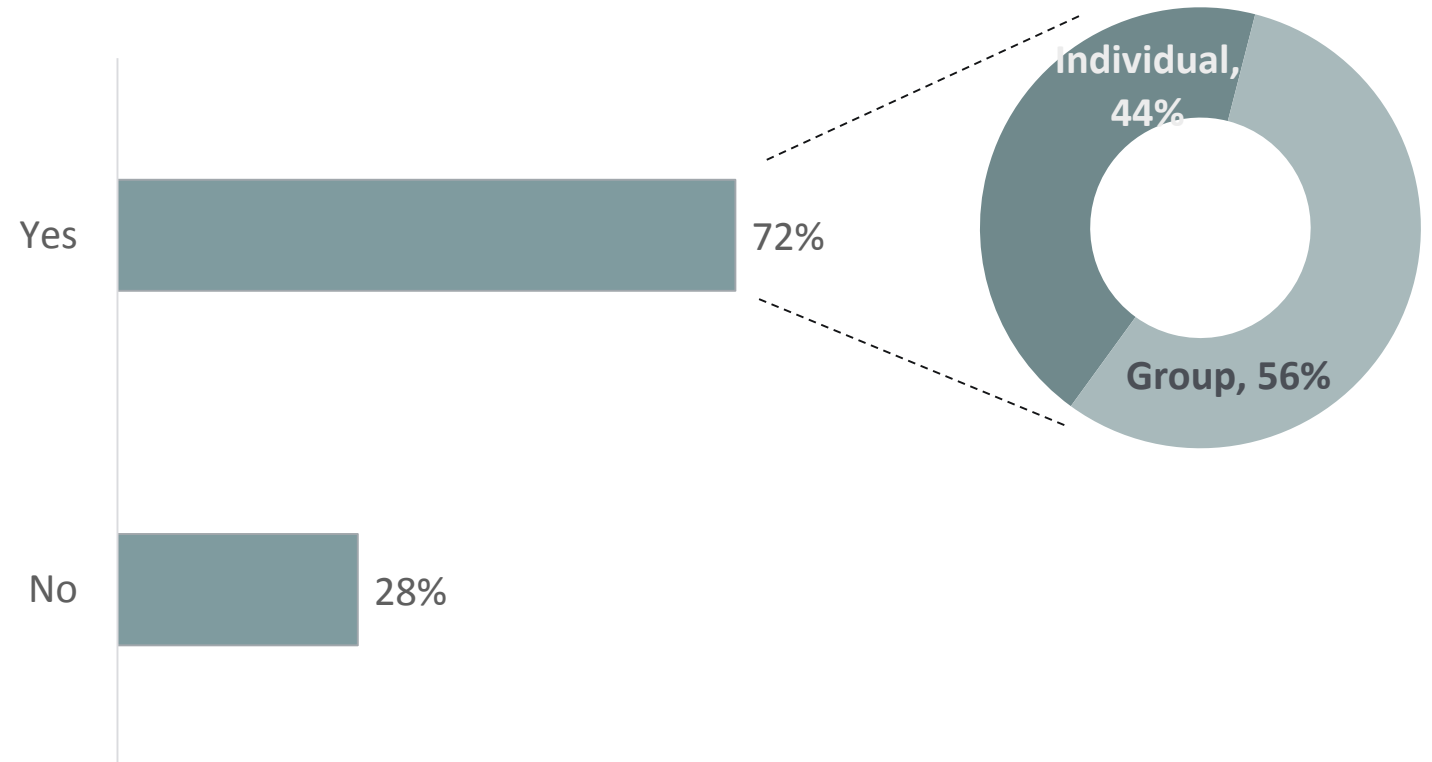


Volume and value

Provision of spend data

- In total, 72% of respondents to the online survey were able to provide spend data on their trip. All subsequent spend questions and overall value calculations are based on the data provided by these respondents.
- Just over half of respondents provided group spend figures and 44% provided individual spend. All group spend data was divided by the number of people in the group to give 'spend per person'.

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



Q40: Firstly, is it easier for you to provide your own individual spend for the trip or the total spend for your group?

Base (All): 684

Volume and value

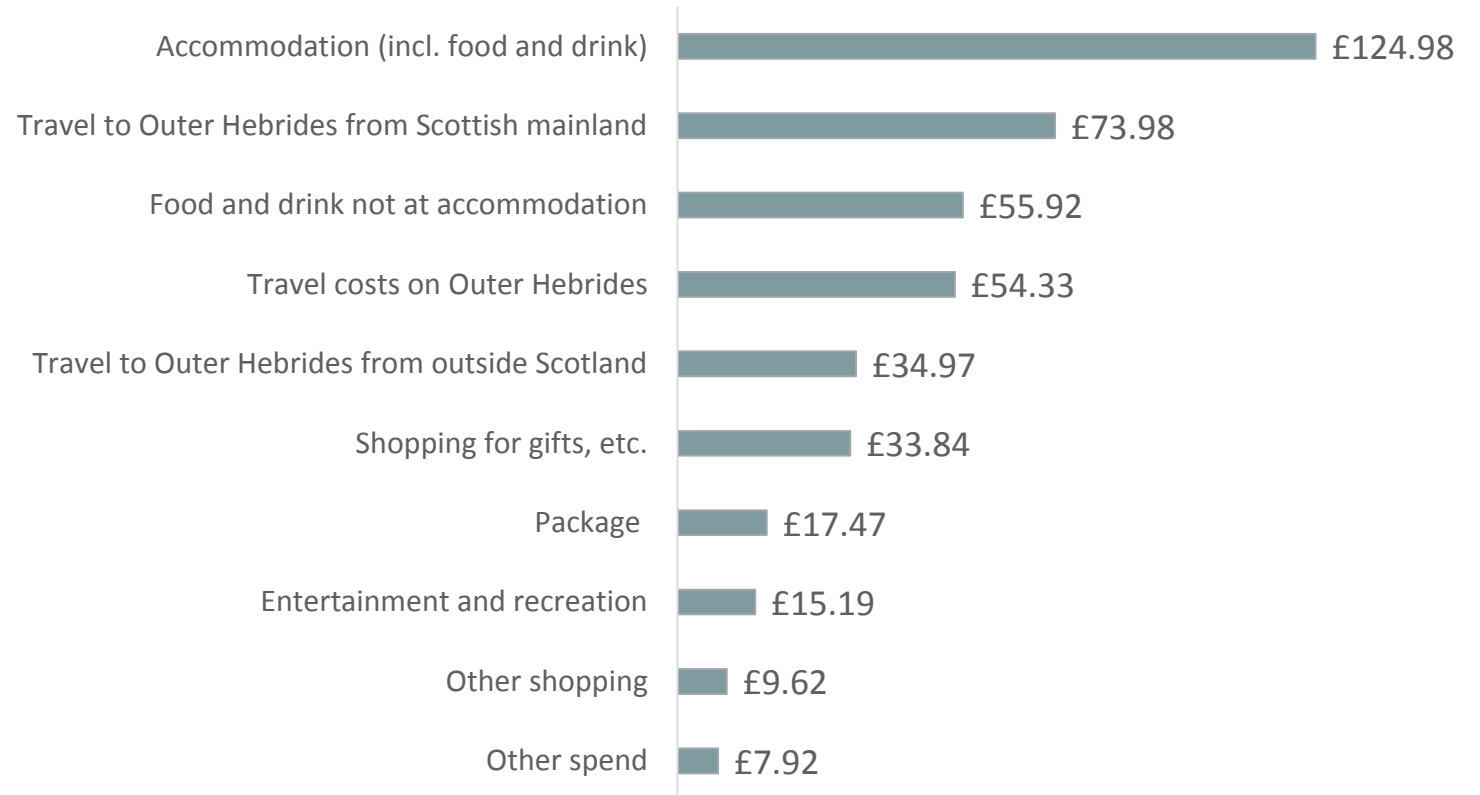
Average spend

- The data tabulated opposite shows the total average spend per person for their trip, as well as the overall average spend in each spend category. These averages are based on the total sample who provided spend data and therefore provide an indication of the average spend across all visitors.
- The highest category of spend was accommodation (£124.98) followed by travel from the Scottish mainland (£73.98).
- The overall average spend per person was £428.23. This figure includes travel expenditure to get to the Outer Hebrides and full package costs, and does not therefore give the total spend per person on the Outer Hebrides Islands. This data is detailed over.

Average total spend for trip – all visitors



Total average spend per person - £428.23



Base (All who provided spend data): 507

Q47/48: How much did you/you and your immediate party/group spend on the following items in total during your stay on the Outer Hebrides?

Volume and value

Average spend

- The total average spend per person on the Outer Hebrides was £308.61.
- This figure excludes travel to the Outer Hebrides from the Scottish mainland or from outside Scotland. The cost of a package holiday has also been adjusted to reflect estimated spend accruing to businesses on the Outer Hebrides.
- Visitors from the overseas (£380.74) and the rest of the UK (£350.48) had higher average spends than those from Scotland (£257.75).
- Leisure visitors tended to spend more on their trip than VFR and Business visitors. The average trip spend by visitor type is detailed over.

Average spend on the Outer Hebrides – all visitors



Total average spend per person on the Outer Hebrides - £308.61



Base (All who provided spend data): 507

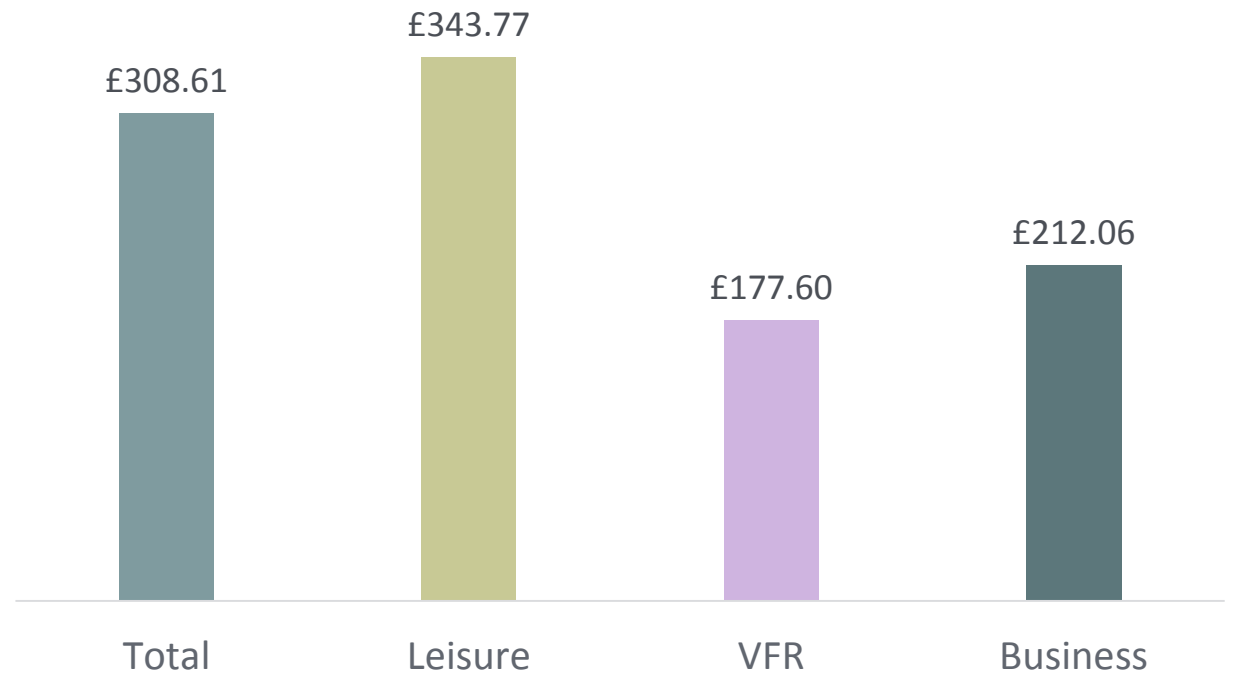
Q47/48: How much did you/you and your immediate party/group spend on the following items in total during your stay on the Outer Hebrides?

Volume and value

Average spend

- Leisure visitors had the highest average spend per person per trip at £343.77.
- The average spend for Business visitors on the Outer Hebrides was lower at £212.06.
- As we might expect, VFR visitors has the lowest average trip spend - £177.60.
- The average spend for a Leisure overnight visitor was £349.62.

Average spend on the Outer Hebrides – by visitor type



Base (All who provided spend data): Total 507; Leisure 418; VFR 39; Business 50



***Figures for VFR and Business visitors should be treated with caution due to low base sizes for provision of spend data.**

Q47/48: How much did you/you and your immediate party/group spend on the following items in total during your stay on the Outer Hebrides?

Volume and value


Total value

- Average spend figures have been applied to visitor volume in order to calculate the total value of visitors to the Outer Hebrides in 2017.
- The total value of visitor spend on the Outer Hebrides in 2017 was £65 million.
- The largest proportion of this spend came from Leisure visitors - £51.1 million.

Total spend by visitors on the Outer Hebrides Islands in 2017



	Number of visitors	Average spend	Total Spend
Leisure	148,641	£343.77	£51,098,385
VFR*	28,417	£177.60	£5,046,806
Business*	41,532	£212.06	£8,807,297
Total	218,590		£64,952,488

Base (All who provided spend data): Total 507; Leisure 418; VFR 39; Business 50 

*Figures for VFR and Business visitors should be treated with caution due to low base sizes for provision of spend data.

Volume and value

Total value

- The spend figures for Leisure visitors have been split by country of origin to calculate the total value of each visitor type.
- Leisure visitors from Scotland contribute the highest value to the islands, with a total spend of approximately £19.5 million.
- The average spend per person for visitors from the rest of the UK (£366.72) is higher than Scotland visitors, meaning that the overall value of Leisure visitors from the rest of the UK is also high at £18 million.
- Overseas visitors have the highest average spend per person, therefore, despite lower visitor numbers, these visitors contribute approximately £13.6 million to the islands economy.

Total spend by Leisure visitors on the Outer Hebrides Islands in 2017



	Number of visitors	Average spend	Total Spend
Scotland	63,916	£305.18	£19,505,798
Rest of UK	49,052	£366.72	£17,988,201
Overseas	35,674	£380.42	£13,571,060
Total Leisure	148,641	£343.77	£51,098,385*

Base (All who provided spend data): Total Leisure 418;
Scotland 164; rest of UK 159; overseas 95

*Total spend figures by origin do not add exactly to total Leisure spend. This is due to rounding and weighting.

Volume and value

Spend categories

- The majority of visitors spent across a range of categories, including travel, food and drink, accommodation, entertainment and shopping.
- As we would expect, the highest proportions of visitors spent on food and drink and travel to the Outer Hebrides.
- Leisure visitors were more likely to spend on shopping for gifts and souvenirs (75%) than VFR (67%) or Business (39%) visitors.
- Leisure visitors were also more likely to mention spend on entertainment/recreation (52%) than VFR (33%) or Business (10%) visitors.

Q47/48: How much did you/you and your immediate party/group spend on the following items in total during your stay on the Outer Hebrides?

Proportions providing spend data in each category – all visitors



Base (All able to provide spend): 504

Volume and value

Average spend

- In order to show a more accurate value for how much people spent in each category, the figures opposite are only based on those respondents who provided spend figures in each category, i.e. the averages exclude zeros.
- Therefore, for people who travelled directly to the Outer Hebrides from a location outside of Scotland (e.g. Manchester) the average cost of travel was £132.32. Travel from the Scottish mainland costs around £79.49 per person on average.
- The average cost of accommodation for people staying in paid for accommodations was £157.32, whilst the additional costs of food and drink on the trip averaged £59.14 for those who incurred these costs.
- Of those who purchased gifts and souvenirs, the average amount spent on the trip was £49 per person.

Q47/48: How much did you/you and your immediate party/group spend on the following items in total during your stay on the Outer Hebrides?

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

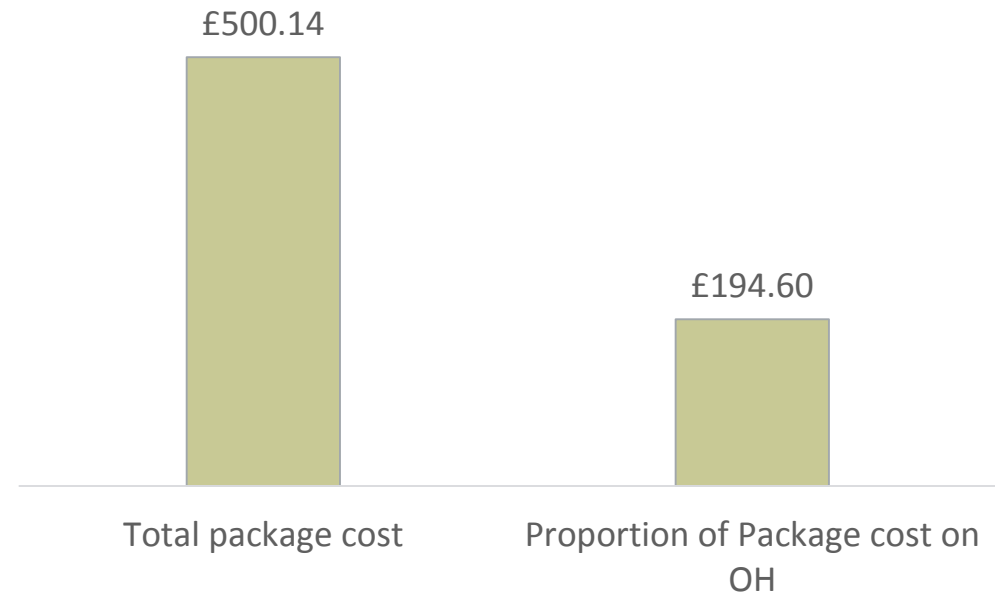


Base (All able to provide spend in each category): 131 - 469

Volume and value Visitors on a package


- 6% of Leisure visitors booked their trip as a package.
- Of those able to provide trip spend, two thirds reported that their package included only time spent in the Outer Hebrides, while one third reported that it included nights elsewhere.
- The value of the package which was estimated to accrue to businesses on the Outer Hebrides was calculated on the basis of:
 - Proportion of total length of trip spent on the Outer Hebrides
 - Proportionate amount of time spent on the Outer Hebrides divided by 2.
- The assumption that approximately half of the package spend will accrue to the Outer Hebrides businesses is used to provide consistency with previous value calculations in 2013, 2009 and 2005.

Average cost of a package trip - Leisure visitors



Base (All Leisure visitors on a package who were able to provide spend): 24





Comparisons to previous research

Comparisons to previous research

Notes on analysis



- Due to changes in method and question wording, there is limited scope for comparisons between 2017 and data gathered in previous waves of research – 2013, 2009 and 2005.
- Key differences between the surveys are noted in this section. It is important to note, however, that some data which was collected via the online survey in 2017 was collected via face-to-face surveys previously. The different methods of data collection can have an impact on findings, particularly for spontaneous questions.
- Furthermore, some questions were asked differently in previous years, or had different lists of response codes. Again these changes can impact on findings. In particular, the rating scales used to measure satisfaction with aspects of the visit, visit experience, likelihood to return and likelihood to recommend were different in 2017. This means that direct comparisons of these questions to 2013 is not possible.

Comparisons to previous research

Profile of visitors



All visitors:

- A higher proportion of visitors in 2017 were Leisure visitors (68%) than in 2013 (54%). There was a lower proportion of Business visitors in 2017 (19%), compared to 2013 (26%). VFR visitors are also slightly lower in 2017 (12%) compared to 2013 (18%).
- The proportions of males to females was very similar between 2013 and 2017.
- The age profile of all visitors was also similar in 2017 to previous years, with a skew to over 45s.
- The profile by country of origin was also very similar between 2013 and 2017, with no significant differences in the proportions visiting from Scotland, the rest of the UK and overseas.
- The proportion of first time visitors to the Outer Hebrides in 2017 (42%) was higher than in 2013 (37%).

Leisure visitors:

- The age and gender profile of Leisure visitors was very similar to previous years.
- There was a higher proportion of overseas Leisure visitors in 2017 (25%) than in 2013 (19%).

Comparisons to previous research

Visitor journey, trip profile, overall satisfaction



- The data suggests marginally more advance planning of trips to the Outer Hebrides in 2017 compared to 2013. In total, 29% of visitors in 2017 planned less than one month in advance, compared to 34% in 2013. Similarly, 25% of visitors in 2017 booked within 2 weeks or did not book in advance, compared to 32% in 2013.
- In terms of sources of information used during the planning process, Leisure visitors were less likely to report using printed materials in 2017, such as brochures (2013 33%; 2017 9%) and guidebooks (2013 43%; 2017 22%). Talking to family/friends (2013 33%; 2017 43%) and social media (2013 4%; 2017 10%) have increased since the last survey.
- There were also slightly fewer Leisure visitors using these printed materials during their visit to the Outer Hebrides - brochures (2013 36%; 2017 26%) and guidebooks (2013 31%; 2017 24%). Usage of social media whilst on holiday has increased since the last survey (2013 3%; 2017 13%).
- A higher proportion of Leisure visitors engaged with social media in 2017 (55%) than 2013 (40%). Visitors were more likely to upload photos of their trip and update their Facebook status in 2017 as they had been in 2013. Further, 17% of Leisure visitors also reported posted a review online in 2017 – this code option was not provided in 2013.
- The profile of transport used as the main type during their visit to the Outer Hebrides was very similar in 2017 to 2013, although slightly fewer used a private car (2013 67%; 2017 63%) and more used a hire car (2013 13%; 2017 19%).
- The proportions of Leisure visitors staying in B&Bs and hotels was consistent between 2013 and 2017. However, a higher proportion stayed in self-catering accommodation in 2017 (2013 24%; 2017 34%).
- Slightly fewer respondents stated that they were ‘very satisfied’ with their visit to the Outer Hebrides in 2017 (78%) compared to 2013 (87%). It is important to note, however, that this question was asked as part of the face-to-face survey in 2013 and in the online survey in 2017. Respondents are more likely to provide a positive response when asked this type of question face-to-face when still on the islands.

Comparisons to previous research

Volume and value



- The data provided by travel operators for passenger numbers in 2017 indicate that the total numbers of visitors are very similar in 2017 (218,590) to 2013 (218,196). However, there has been an increase in Leisure visitors over this time, from 128,316 in 2013 to 148,641 in 2017.
- The average spend per person per trip on the Outer Hebrides also increased between 2013 and 2017. In 2013 visitors spent £245 on average on their trip, whereas in 2017 the average spend was £309.
- Both of these factors have resulted in a significant increase in the total value of visitors to the Outer Hebrides economy. This figure has increased from £53.5 million in 2013 to £65 million in 2017.



Final summary and conclusions

Summary and conclusions

All Visitors



- This research has been conducted to ensure that Comhairle nan Eilean Siar and its partners have relevant, accurate and up-to-date data to guide strategic planning to maximise the value of tourism for the Outer Hebrides economy in a sustainable way, and ensure that visitors have an excellent experience on the islands.
- Just over two thirds of visitors to the Outer Hebrides in 2017 were on a holiday/leisure trip, while 19% were business/work visitors and 12% had travelled to the islands to visit friends or relatives.
- The islands attract visitors from all over the world, although the largest proportion come from Scotland (55%) or other parts of the UK (28%). Overseas visitors were predominantly from Europe (11%), with some also visiting from North America (4%).
- The gender profile of visitors was slightly skewed to males (58%), and the age profile tended to be older (64% over 45 years old).
- The majority of visitors were on holiday with their partner or spouse, while just less than one in ten had children in their party.
- 42% of all visitors were first time visitors to the Outer Hebrides, while 58% had visited before.

Summary and conclusions

Leisure Visitors



- Around three quarters of Leisure visitors were from the UK, with 43% from Scotland and 33% from other parts of the UK. Overseas Leisure visitors were predominantly from Europe (16%), with a number also visiting from North America (6%) and other overseas countries (3%).
- The gender profile of Leisure visitors was slightly skewed to males (54%). Leisure visitors also tended to belong to the older age groups (67% over 45 years old).
- The majority of Leisure visitors (68%) were on a holiday or short break with their partner or spouse, while just less than one in ten had children in their party.
- Just over a half (53%) of Leisure visitors were first time visitors to the Outer Hebrides, while 47% had visited before.
- The research has highlighted the key attributes associated with the Outer Hebrides that influenced Leisure visitors to visit are the scenery and the chance to get away from it all.
- Inspiration came from a number of sources, with TV programmes (20%), such as Paul Murton: Grand Tours of Scottish Islands or Monty Hall's Hebridean Adventure, being particularly important. A number (17%) also mentioned books, including the novels by Peter May set on the islands, travel features in newspapers or magazines (15%) and/or watching or reading about the islands people in the media (14%).

Summary and conclusions

Leisure visitors



- The majority of Leisure visitors planned the trip within 6 months of travel, with visitors researching using mainly online sources and talking with family and friends. This finding highlights the opportunity to use advocacy to spread the word and encourage people to visit the islands. Indeed, over three quarters of Leisure/VFR visitors scored 9 or 10 out of 10 in terms of their propensity to recommend the Outer Hebrides to others.
- Visitouterhebrides.co.uk and VisitScotland.com were particularly well used by Leisure visitors during the planning process. It is also significant that 40% of those who researched online looked at traveller reviews and ratings.
- Booking of transport and accommodation tends to be done directly with providers, rather than via agents or other intermediaries.
- Overall 94% of all visitors stayed overnight on their trip to the Outer Hebrides. The majority of overnight visitors (83%) stayed for a period of one week or less.
- Lewis and Harris were the most popular areas to visit - around three quarters of Leisure visitors visited both of these areas. The main activities undertaken by Leisure visitors reflect their reasons for visiting the Outer Hebrides – visiting beaches and the coast, taking short walks, visiting other viewpoints and general touring and sightseeing. Activities tended to be somewhat passive, with few visitors mentioning more active pursuits such as sports, cycling, water sports, etc. There may be an opportunity to attract younger visitors with focussed marketing of these activities on the Outer Hebrides.

Summary and conclusions

Leisure visitors



- For Leisure visitors the most often mentioned accommodation types were self-catering (34%), B&Bs/Guest houses (29%) and hotels (24%). Although only 4% of Leisure visitors mentioned 'homestay' accommodation (such as Airbnb), this option was more popular amongst younger visitors and is likely to become more prevalent in the future if availability on the Outer Hebrides increases.
- Online sources of information were particularly important to Leisure visitors during their trip, although many also mentioned talking to locals and visitors information centres. Just over half of Leisure visitors actively engaged with online or social media activity during or after their trip – most commonly to upload photos and update their Facebook status.

Summary and conclusions

Business visitors



- Business visitors were predominantly from Scotland (82%), with 15% from the rest of the UK and 4% from overseas.
- The gender profile of Business visitors was heavily skewed to males (77%).
- The age profile tended to be younger compared to Leisure visitors (50% under 45 years old; 28% 45 – 54 years old).
- The majority of Business visitors were visiting to work (59%) or to attend a meeting (31%). Business visitors represented a wide range of industry sectors, with the most frequently cited being engineering (13%), health services (11%) and government/local government (11%).
- Almost two thirds of Business visitors were travelling alone.
- The majority of Business visitors (82%) had been to the Outer Hebrides before; only 18% were first time visitors.
- Compared to Leisure (3%) and VFR (2%) visitors, a higher than average proportion of Business visitors (16%) were on a day trip to the islands. Around half travelled to the islands by air, most commonly from Glasgow (26%) and Inverness (16%) airports.
- Of those who stayed overnight, 55% stayed in a hotel, 19% stayed in a B&B/guest house and 14% stayed in self-catering accommodation. Overnight visits tended to be for less than 3 nights.

Summary and conclusions

VFR visitors



- VFR visitors were predominantly from Scotland (78%), with 18% from the rest of the UK and 5% from overseas.
- The gender profile of VFR visitors was evenly split between males (49%) and females (51%).
- The age profile of VFR visitors was more skewed to younger age groups, compared to Leisure visitors – 36% were under 45 years old.
- The largest proportions of VFR visitors were visiting with their partner or spouse (45%) or alone (27%). A higher proportion had children in their party (20%) compared to Leisure visitors (9%).
- Three quarters of VFR visitors stayed with their friends or relatives. Their stay tended to be for 1 to 3 nights (34%) or 4 to 7 nights (47%).
- As we would expect, the majority of VFR visitors (94%) had been to the Outer Hebrides before.

Summary and conclusions

Evaluation of trip experience – all visitors



- The vast majority of visitors to the Outer Hebrides provided a very positive evaluation of their experience on the islands.
- Their interactions with local people were particularly praised. The aspects of their trip which received the highest satisfaction scores were the friendly and efficient service and quality of accommodation. The quality and value for money of visitor attractions, historic sites, etc. and the quality of local food/drink and arts/crafts were also praised.
- The key area for improvement was identified as the extent and quality of digital coverage (Wi-Fi, mobile phone signal, 3G/4G). Open-ended responses also suggested that food and drink options were lacking for some and road signs could be better.
- Encouragingly, many Leisure and VFR visitors agreed that there is more to the Outer Hebrides than previously thought (64%) and that the Outer Hebrides is worth visiting more than once (92%). Furthermore, three quarters of Leisure visitors rated their likelihood to return to the Outer Hebrides with a score of 8 or more out of 10.
- Overall, 78% of all visitors, and 82% of Leisure visitors stated that they were 'very satisfied' with their trip to the Outer Hebrides.



Technical appendix

Technical appendix

Method and sampling



- The data was collected by face-to-face interviews (calibration) and an online survey.
- The target group for this research study was visitors to the Outer Hebrides in 2017.
- The target sample size for the calibration interviews was 1,880 and the final achieved sample size was 2,228. The reason for the difference between these two samples was higher than expected response rates at some sampling points.
- The target sample size for the online survey was 500 and the final achieved sample size was 684. The reason for the difference between these two samples was better than expected response rates for the calibration and online surveys.
- Fieldwork was undertaken between January and December 2017.
- Respondents were selected using probability random sampling, whereby interviewers selected every nth person passing their pre-selected sampling point.
- Respondents to internet self-completion studies are self-selecting and complete the survey without the assistance of a trained interviewer. This means that Progressive cannot strictly control sampling and in some cases, this can lead to findings skewed towards the views of those motivated to respond to the survey.
- The overall response rate to the survey was 43%.
- Due to the strict random sampling applied, the calibration data is representative of passengers at each sampling point. The data set was weighted to reflect the actual distribution of passengers across sampling points to ensure greater accuracy of results. The online data was skewed to Leisure and rest of UK visitors and was, therefore, weighted on the basis of visitor type and origin based on the calibration data.
- An incentive of 5 x £100 Amazon vouchers (prize draw competition) encouraged a positive response to the survey.
- In total, 12 interviewers worked on data collection.
- Each interviewer's work is validated as per the requirements of the international standard ISO 20252. Validation was achieved by re-contacting (by telephone or email) a minimum of 10% of the sample to check profiling details and to re-ask key questions from the survey. Where telephone details were not available re-contact may have been made by post. All interviewers working on the study were subject to validation of their work.

Technical appendix

Data processing and analysis



- The final data set was weighted to reflect:
 - Calibration – distribution of passengers across the sampling points (airports and ferry terminals)
 - Online – visitor type and origin (based on calibration data)
- The calibration sample base before weighting is 2,228, whilst the weighted sample base is 2,363.
- The overall calibration sample size of 2,228 provides a dataset with a margin of error of between $\pm 0.41\%$ and $\pm 2.07\%$, calculated at the 95% confidence level (market research industry standard).
- The online sample base before weighting is 684, whilst the weighted sample base is 688.
- The overall online sample size of 684 provides a dataset with a margin of error of between $\pm 0.74\%$ and $\pm 3.74\%$, calculated at the 95% confidence level (market research industry standard).
- Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.
- For **online surveys** these checks include:
 - Responses are checked for duplicates where unidentified responses have been permitted.
 - All responses are checked for completeness and sense.
 - Depending on the requirements of the survey, and using our analysis package SNAP, data is either imported from email responses received in a dedicated email inbox or stored directly on our dedicated server
- For **CAPI Questionnaires** these checks include:
 - Responses are checked to ensure that interviewer and location are identifiable. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact interviewers to check.
 - Using our analysis package SNAP, data received via over-the-air synchronisation is imported from our dedicated server.

Technical appendix

Data processing and analysis



- A computer edit of the data carried out prior to analysis involves both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
- Where “other” type questions are used, the responses to these are checked against the parent question for possible up-coding.
- Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
- A SNAP programme set up with the aim of providing the client with useable and comprehensive data. Crossbreaks are discussed with the client in order to ensure that all information needs are met.
- Data gathered using online surveys are validated using the following technique:
 - Internet surveys using lists use a password system to ensure that duplicate surveys are not submitted. The sample listing is also de-duplicated prior to the survey launch.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.