

# **WESTERN ISLES VISITOR SURVEY 1999**

**Final Report By**

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**Prepared For**

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**February 2000**

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# KEY STATISTICS

## VOLUME AND VALUE ESTIMATES (Complete year)

TOTAL NUMBER OF VISITORS (all purposes)	165,000 people
TOTAL VISITOR EXPENDITURE ON ISLANDS	£ 32.9 million

## SURVEY RESULTS

PURPOSE OF TRIP	Holiday (66%), Business (18%), VFR (16%)
ORIGIN	Scotland (38%), Other UK (38%), Overseas(24%)
LENGTH OF STAY ON ISLANDS	6.37 nights
LENGTH OF STAY - HIGHLANDS & ISLANDS	9.70 nights
TOTAL NIGHTS AWAY FROM HOME	14.1 nights
AVERAGE SPEND PER PERSON PER TRIP IN W. ISLES	£ 203
AVERAGE PARTY SIZE	2.12 people
PARTY TYPE	Couple (38%) Family (21%) Individual (16%) Friends (15%) Group / tour (7%)
MAIN TRANSPORT ON ISLANDS	Private car (48%) Hire car (17%) Public bus (9%) Private bus/coach (8%)

## MAIN ACCOMMODATION ON ISLANDS

Hotel/Guest house (26%)

B&B (20%)

VFR / own property (20%)

Self catering (10%)

Camping (9%)

Hostel / bunkhouse (7%)

## PROPORTION OF VISITORS VISITING:

Lewis (71%)

Harris (56%)

North Uist (35%)

Benbecula (35%)

South Uist (29%)

Barra (19%)

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## WHO COMES TO THE WESTERN ISLES?

**TRIP PURPOSE:** Although the majority of visitors were on holiday (66%), business visitors also form a significant market segment (15%) as well as those visiting friends or relatives (16%). In addition, a further 3% were combining business with holiday.

**ORIGIN:** In total, just over a third of respondents were from Scotland (38%), a similar proportion from the rest of the UK (38%) and around a quarter were from overseas (24%).

**TYPE OF HOLIDAY:** Of those who were visiting on holiday (or visiting friends or relatives on holiday), 60% were on their main holiday and 40% were on a second holiday or short break. However, the 60% who were on their main holiday were not necessarily based in the Western Isles for their holiday - many of them were on a short trip from a holiday on the Scottish mainland. On average, holiday visitors spent 38% of their time in the Western Isles, VFR visitors spent 57% and

business visitors 70%. Overseas visitors were most likely to be on their main holiday while VFR visitors were more likely to be on a second holiday or short break

AGE: The age distribution of respondents was similar to other parts of Scotland. However, the Western Isles would appear to appeal particularly to younger overseas visitors and older English visitors. 54% of overseas visitors were under 45 years old compared to only 34% of English visitors.

SOCIAL GROUP: As with other parts of the Highlands and Islands, visitors to the Western Isles tend to be from higher social groups. Indeed, the sample from the Western Isles was particularly up market with 80% of respondents coming from groups ABC1 with 40% in group AB alone. Overseas visitors in particular come from groups ABC1 (86%).

PREVIOUS VISITS: Just under half of all respondents were visiting for the first time (49%) while around one in five (21%) had visited on 10 or more previous occasions. Not surprisingly, business and VFR visitors were least likely to be on their first visit (31% and 18% respectively) compared to 62% of holiday visitors.

PARTY SIZE Overall, the average party size was 2.12 people. Holiday visitors tended to be in slightly larger parties (2.3 people) while business visitors tended to be in smaller ones (1.55 people).

PARTY TYPE: One third of all respondents were travelling alone. The most popular kind of party was the "couple" (40%). A further 13% of respondents were with families and 9% with friends. Only 2% were with organised groups or tours. However, these figures relate to **parties** and not to the proportion of **visitors**. When the other members of the party are included, it is clear that only 16% of visitors are travelling alone, 38% are in couples, 21% are in families, 15% with friends and 7% in groups or tours.

## WHY DO THEY COME TO THE WESTERN ISLES?

MOTIVATION: A very wide range of motivations were listed by all types of visitors. However, apart for business and domestic reasons, it is clear that the most commonly cited reasons for deciding to visit are primarily connected with the natural environment (44% overall), but to a lesser extent with the cultural environment as well (around 6% overall). Commonly used adjectives and phrases were: peace and quiet, remoteness, wildness, wilderness, isolation, getting away from it all, scenery, landscape, nature, the sea, birds, marine life. Cultural reasons include: crofting way of life, Gaelic, friendly and hospitable people and the way of life in general. Special interests were also mentioned by smaller groups of people, typically by less than 4%.

The very fact that the Western Isles exist was important for a number of people who were island hopping (4%) or who had been to most other parts of Scotland and wanted to see the rest of it (4%). Also, a further 5% said they had always wanted to visit or were simply curious about what it was like.

**INFLUENCES:** Faced with a list of possible influences which may have played a part in the decision to visit, the most influential were previous visits or knowledge (31%) and advice from friends or relatives (29%). Guide books and brochures were also significant (14% each), especially for overseas visitors. The Internet has also become a notable influence or source of information in recent years (7% overall), especially for overseas visitors (14%).

## **HOW LONG DO THEY STAY?**

**WESTERN ISLES:** The average stay in the Western Isles was 6.37 nights. However, 5% of visitors were day visitors only and did not stay overnight at all. 2% of visitors stayed more than a month.

Overseas visitors stayed the shortest time (4.9 nights) and UK visitors (excluding Scotland) stayed the longest (7.5 nights). By purpose of trip, it was the VFR visitors who stayed longest (8.64 nights) compared to holiday visitors at 5.95 nights and business visitors at 5.98 nights.

Visitors staying primarily in self catering accommodation stayed longest at 12.2 nights compared to those staying in hotels or guest houses (3.95 nights) and B&Bs (4.68 nights).

**VARIOUS ISLANDS:** More visitor nights are spent in Lewis than any other island (average of 2.57 nights per respondent). Harris is the next most popular (0.98 nights), then Barra and North Uist (both 0.85 nights), South Uist (0.78 nights) and finally Benbecula (0.34 nights).

**TIME ELSEWHERE:** Apart from the Western Isles, visitors spent some time in the Highlands and Islands and other parts of Scotland. On average, a further 3.33 nights were spent in other parts of the Highlands and Islands and 2.1 nights elsewhere in Scotland.

**AWAY FROM HOME:** An average of 14.1 nights per respondents were spent away from home on the current trip. Thus, it can be seen that, overall, less than half the total trip time is spent in the Western Isles. Many visitors, therefore, include a visit to the Western Isles in a wider and longer trip to other places and may not leave home having their minds focused on the Islands as their destination. This is

most obviously the case with overseas visitors who spent 25.6 nights away from home but only 4.9 in the Western Isles.

## **WHAT DO THEY DO ON THE WESTERN ISLES?**

**ACTIVITIES:** More than half the visitors took part in one or more sporting activity, most commonly low level walking and rambling of under 8 miles (51%), or hillwalking or low level walking of more than 8 miles (20%). The next most popular sporting activities were cycling or mountain biking (10%), swimming / leisure centres (8%), fishing (8%) and sailing / boat trips (7%).

The majority of visitors did some general sightseeing and touring (71%) and 37% of all visitors identified this as their main activity. Other popular non-sporting activities were photography (45%), shopping for local products (31%), bird watching (30%) and other nature watching (24%).

Also popular with visitors was visiting sites of interest such as the beach / coast (60%), archaeological sites (51%), museums, heritage centres or galleries (39%) and historic buildings or monuments (34%).

Interestingly, business visitors also undertook a reasonably wide range of activities and clearly enjoyed other aspects of their trip than just business. For example, 37% did some sightseeing and touring, 27% did some walks under 8 miles, 12% walked more than 8 miles and 20% visited archaeological sites.

VFR visitors also appear to have been quite active during their stay. Popular activities were general sightseeing or touring (57%), low level walking or rambling (56%), photography (33%), visits to archaeological sites (32%), visits to historical buildings or monuments (21%) and birdwatching (20%)

**ATTRACTIONS:** Almost half of all visitors visited the Callanish Stones (47%) and the proportion of holiday visitors to visit them was 60%. This was the most popular of all the attractions listed in the questionnaire, followed by Carloway Broch (30%) and Lady Lever Park / Lews Castle (16%). A reasonable proportion of both business and VFR visitors also visited many of the attractions.

Overall, 60% of visitors visited only one (or less) of the attractions listed while 9% visited four or more of them.

**TICs:** Just over half of all visitors (54%) made one or more visits to a TIC. The figure for holiday visitors was higher at 67% compared to 28% of business and VFR visitors. By country of origin, overseas visitors made most use of TICs

**EVENTS:** Overall, 16% of visitors attended a cultural, musical or local event (2.2%, 7.9% and 6.1% respectively). Musical events were most popular with overseas visitors (9.8%) while local events were best attended by Scottish visitors (8.3%).

Just over half the sample (52%) claim to have been very or fairly interested in cultural or Gaelic events at the time of planning their visit with the greatest interest being expressed by overseas visitors (75%). Interestingly, interest was also expressed amongst business and VFR visitors (32% and 49% respectively)

13% said that a programme of cultural or Gaelic events in the Western Isles would "definitely" have encouraged them to stay longer or visit again and a further 28% said it "probably" would. While this type of question generally results in a rather over stated level of interest, it is clear that such a programme of events would have an important impact on length of stay and repeat visits.

## **WHERE DO THEY GO?**

**ISLANDS:** 71% of all visitors had been to Lewis, 56% to Harris, 35% to North Uist and Benbecula, 29% to South Uist and 19% to Barra. 1% of visitors had stayed overnight on **all** of the islands but most visitors stayed overnight on only one of them (63%).

**DISPERSION:** Within each of the islands, the main towns were the most visited places. However, holiday visitors in particular demonstrated a significant degree of mobility and managed to visit many of the remoter villages and locations. Around half of all visitors, regardless of entry and exit point, travelled round the west side circuit of Lewis past Callanish.

## **WHERE DO THEY STAY?**

**ACCOMMODATION:** The most popular type of accommodation was hotels and guest houses (26%), especially with business visitors (50%). Bed and Breakfasts were used as the main form of accommodation by 20% of visitors but were most popular with overseas visitors (31%). A further 20% of visitors stayed with friends or family or in their own properties. Self-catering accommodation was used by 10%, a further 9% camped and 7% stayed primarily in hostels and bunkhouses which were most popular amongst overseas visitors (16%) who tended to be younger and more active.

**LOCATIONS:** Within each of the islands, overnight stays tended to be concentrated around the main towns but a significant proportion were dispersed around the

rural areas as well. For example, in Lewis 64% of relevant respondents identified Stornoway as their main overnight location but 36% identified other rural locations such as Carloway (9%), Valtos / Uig (4%) and Barvas (4%). In Harris, 42% of respondents stayed primarily outside of Tarbert and in North Uist 44% stayed primarily outside Lochmaddy.

**BOOKING:** Of those who stayed in some form of paying accommodation, two thirds of them (66%) booked all their accommodation before arriving and another 10% booked some of it. This leaves 23% who booked none of it in advance.

**INFORMATION:** The most commonly used sources of information about accommodation were the Western Isles brochure (27%), previous knowledge (18%), Scottish Tourist Board brochure (15%), advice from others (15%), Calmac brochure (8%) and the Internet or website (8%). The Internet was particularly important amongst overseas visitors (13%)

The complaint is sometimes made by ATB members that the cost of membership is not justified on the basis of the trade generated by Tourist Board marketing and other activities. However, an analysis of the sources of information used by visitors who did not have previous knowledge or advice from friends and relatives, reveals that the Tourist Board funded methods were the most commonly used of all information sources. For example, 32% of relevant guests staying in B&Bs used the Western Isles brochure, 21% used the STB brochure and 11% used TICs. Accommodation providers may judge the fruit of their membership by the number of referrals from local TICs but the analysis shows that a much larger proportion of visitors use the brochures as their source of information.

## **HOW DO THEY TRAVEL?**

**TRANSPORT:** Most respondents use a private car or hire car to travel on the islands (48% and 17% respectively). Not all the private cars come across on the ferry however, as many VFR visitors have use of a family car and some business visitors have access to company vehicles or are transported by colleagues on the islands. Not all hire cars are hired on the islands either. Some of them are hired on the mainland as part of a longer holiday in the north of Scotland.

Around 9% of visitors are mainly using public buses on the Western Isles, particularly younger visitors (18% of under-35s). Overall 8% of visitors used private buses or coaches as their main form of transport, particularly older visitors (15% of over-54s)

## **WHAT DID THEY SPEND AND BUY?**

**PURCHASES:** Overall 71% of visitors bought or consumed one or more of the products listed in the questionnaire. On average, purchases were greatest amongst overseas visitors, females and older age groups.

The most commonly consumed foods were fresh shellfish (17%), smoked salmon (17%) and other seafood (21%). Consumption of local foods was roughly equal between holiday, business and VFR visitors.

Books and publications were the most commonly purchased non- food product (34%) followed by pottery / ceramics (15%), Jewellery (11%), Harris Tweed, photographs and traditional or local music (10% each). All the products listed were more popular with overseas visitors than those from the UK, especially those from Scotland.

Although direct comparisons with previous visitor surveys are difficult, it would appear that levels of consumption and purchases of local products are lower in the Western Isles than in Orkney in 1996 where many local products have been well branded and promoted.

**EXPENDITURE:** The average expenditure on the islands was £203 per person per trip. This excludes the cost of getting to the islands from home. Amongst holiday visitors the average was £226, business visitors £207 and VFR visitors £108. The highest spending groups were those staying in self-catering accommodation (£356), those staying in hotels or guest houses (£285), those using hired cars (£275), those touring round the islands (£285), visitors from other parts of the UK (£243) and visitors over the age of 54 (£236).

**TOTAL VALUE:** Using the average expenditures outlined above and estimates of total visitor numbers based on passenger carryings and the calibration surveys, the total direct expenditure in the Western Isles between May and October 1999 is estimated to be **£24.4 million**, by 123,000 visitors. Extrapolating visitor numbers to the remainder of the year, the total direct expenditure was **£32.9 million**, by 165,000 visitors. Of this total, 64% came from holiday visitors, 28% from business visitors and 8% from VFR visitors.

## **WHAT DID THEY THINK ABOUT THE TRIP?**

**EXPECTATIONS:** Generally, visitors had their expectations met (60%) or exceeded (35%). Only 3% said their expectations had not been met and the most common reasons were the weather, poor fishing, poor airline services, lack of facilities or other specific or personal reasons.

**FEEDBACK:** In general, respondents gave fairly positive feedback on a range of tourism issues in the Western Isles, with less than 10% expressing any

noticeable dissatisfaction for anything. Weighted average scores were calculated which allow direct comparisons between responses by summarising the spread of response to any particular question into one single measure. Using a weight of 5 for the response "very good" down to 1 for "very poor", the higher the weighted average score, the greater the level of satisfaction on average. Highest ratings were given for the quality of service in the shops (weighted average score 4.19) and the quality of food and drink (4.09). Lowest ratings were given for the range of local craft products (3.56), signposting (3.56) and the range of attractions, events and things to do (3.65).

**IMPROVEMENTS:** When asked what, if anything, the bodies responsible for tourism could do to improve their visit or encourage them to visit again, 41% could not think on anything or said that nothing was needed or that it should be kept as it is. The remainder of respondents mentioned an extremely wide range of possible improvements and few things emerged as frequent suggestions. The most common theme, if any, to emerge related to transport issues, mentioned by around a quarter of respondents. Specific improvements related to the cost, quality and frequency of ferries (8.7%) and air services (4.4%), signposting and information for attractions (5.8%), road signs generally (4.2%), public transport on the islands (3.1%) and quality of local roads (1%).

**HIGHLIGHTS:** It is clear that visitors appreciated a wide range of things about their trip. One of the most common themes, referred to by around 40% of visitors, related to the outdoor environment, especially the scenery, landscape, atmosphere, coast, nature and weather. Callanish was mentioned by 8% of visitors and a further 9% mentioned other specific places. Cultural aspects such as the local people and the way of life was a third theme mentioned by around 9% of respondents.