Scotinform

OUTER HEBRIDES VISITOR SURVEY 2012/13

RESEARCH RESULTS – FINAL REPORT

February 2014

Comhairle nan Eilean Siar

HIE
Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean

VisitScotland

Prepared by Scotinform Ltd and Reference Economic Consultants

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Market Research
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EXECUTIVE SUMMARY

1. Research Background

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

The research was carried out using three methods:

> **Face-to-face exit interviews:** 1,262 interviews were completed with visitors as they departed from the airports (Stornoway, Benbecula and Barra) and ferry terminals (Stornoway, Tarbert, Lochmaddy, Lochboisdale and Castlebay). The interviews were completed between October 2012 and September 2013, with the number of interviews per month based on historical passenger data. The questionnaire gathered data on the visitors' demographics, the main activities undertaken in the Outer Hebrides and the trip expenditure.
>
> **Online survey:** the link to an online questionnaire was emailed to respondents who had provided email addresses in the exit interviews. This questionnaire allowed a wider range of topics to be addressed than in the face-to-face interviews, with visitors asked about the details of their trip and levels of satisfaction with different elements of their visit. A total of 888 responses were received from visitors to the Outer Hebrides.
>
> **Calibration survey:** this survey collected data on all passengers (both visitors and residents), and was used to calibrate the passenger data provided by transport operators so that accurate estimates of total visitor spend could be made. A total of 5,467 face-to-face calibration interviews were completed from October 2012 to September 2013, with departing passengers asked their normal place of residence and, if not resident in the Outer Hebrides, their type of visit and group size.

The analysis of the data from the face-to-face exit interviews and online survey provides robust findings on visitors to the Outer Hebrides which are compared with the findings from the surveys for Orkney and Shetland.

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

2. Impact of Visitors

There were a total of 218,000 visitors to the Outer Hebrides during 2012-2013. Holiday visitors accounted for 59% of visitors, with business and visiting friends and relatives (VFR) each accounting for around 20%. Over 80% of visitors used ferries to travel to the Outer Hebrides. Holiday visitors were the main users of ferries, with VFR showing a preference for ferry, and business visitors evenly split between ferry and air travel.

The average spend per trip in the Outer Hebrides was £245. Business visitors had the highest levels of spend per trip (£279), followed by holiday visitors (£273) and VFR (£145). The results suggest that approximately 9% of visitor expenditure is on local products and produce.

The value of visitors to the Outer Hebrides for 2012-2013 was over £53 million, representing a decrease of £7 million compared with inflation adjusted 2006 estimates. However, the 2006 comparison should be treated with caution as the calculations were based on visitor surveys carried out in 1999.
The contribution of Scottish visitors to the Outer Hebrides was over £24 million, whilst visitors from elsewhere in the UK contributed £21 million and overseas visitors accounted for £7.5 million.

3. Types of Visitor

3.1 The Outer Hebrides

Over half (54%) of visitors to the Outer Hebrides were on a holiday/short break, with a quarter on a business trip and 18% VFR. The type of visit differed significantly at different times of the year: business visitors accounted for around half of all visitors between October to March, whilst the proportion of holiday visitors was highest between April and September.

3.2 Comparisons with other islands

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

4. Visitor Profile

4.1 The Outer Hebrides

Visitors were more likely to be male (55%) than female (45%). The relatively high proportion of males relates to the high percentage of visitors whose main purpose is business: 74% of business visitors were male.

Visitors to the Outer Hebrides were likely to be aged over 45 years old (59%), but one in ten were aged under 16 years old. The age profile of different visitor types varied, however, with holiday and VFR visitors slightly more likely than average to be aged over 45 years old and business visitors most likely to be aged between 25-54 years old.

58% of visitors were Scottish residents, with VFR and business visitors more likely than average to be from Scotland. Just under a third of visitors were from the rest of the UK/Ireland, with holiday visitors much more likely than business and VFR visitors to be from elsewhere in the UK. In total, 12% of visitors were from Europe or elsewhere in the world, with almost a fifth of holiday visitors from overseas.

The social grade of visitors showed a high proportion in higher income brackets, with 61% of visitors classified as ABs, the top two social grades, and only 4% classified as DEs. Holiday visitors were more likely than average to be ABs, whilst business visitors were more likely than average to be in the C1C2 social grade.

Visitors were most likely to be travelling with a partner/spouse (47%), but a third were visiting on their own, with business visitors most likely to be travelling on their own.

4.2 Comparisons with other islands

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

5. Profile of Visits

5.1 The Outer Hebrides

Approximately two thirds of visitors were on holiday or VFR staying overnight and, amongst those staying overnight, 43% were on their main holiday.

Although 37% of all visitors were on a first time visit to the Outer Hebrides, the proportion was much higher amongst holiday visitors (53%) than VFR (9%) or business visitors (23%).

The average length of stay in the Outer Hebrides was 5.7 nights out of a total of 8.8 nights away from home during the trip. VFR visitors were spending longest in the Outer Hebrides: 6.5 nights compared to 6.1 nights for holiday visitors and 3.8 nights for business visitors.

61% of visitors were travelling home after their trip to the Outer Hebrides, with VFR and business visitors more likely than holiday visitors to be going straight home. 36% of visitors were travelling elsewhere in Scotland: with holiday visitors far more likely than business or VFR visitors to be travelling elsewhere in Scotland.

5.2 Comparisons with other islands

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

6. Planning the Visit

6.1 The Outer Hebrides

16% of holiday visitors had considered a visit to Orkney when planning their trip and 9% said they had considered a trip to Shetland.

The main influences on their decision to visit the Outer Hebrides were an interest in the scenery/landscape and previous experience of visiting the area. Other influences were having family connections with the area and the islands' archaeology/history. For visitors from outside Scotland the main influence was scenery/landscape, but for Scottish visitors, experience of previous visit was as important as the scenery/landscape.

Just over 40% of visitors had planned their trip more than 3 months in advance (mainly holiday visitors), with 34% saying they had planned it in the last month (mostly business visitors). The actual booking of the trip showed a similar pattern to planning, with the notable exception that nearly one in ten visitors did not book in advance.

Satisfaction with planning travel to the Outer Hebrides was high: 65% of visitors said they were very satisfied with 'getting to the Outer Hebrides' and a further 30% said they were quite satisfied. Holiday visitors expressed particularly high levels of satisfaction compared to VFR and business visitors. Visitors were more likely to be positive about the availability of convenient sea routes than about the availability of convenient air routes: 14% of those who rated air routes were not satisfied with availability. The main reasons for not being satisfied with air routes were the cost of flights and lack of choice of departure airports.

6.2 Comparisons with other islands

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

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

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

7. Sources of Information Pre-Visit

7.1 The Outer Hebrides

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

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

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

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

The main information sought from the internet related to accommodation. Other key topics were visitor attractions, history/culture, activities, transport and natural history.

In terms of online booking, approximately 55% of those who had looked for information online had booked accommodation and 22% had booked transport to the Outer Hebrides.

Satisfaction with the information available online was reasonably high: 51% of those who had accessed online information were very satisfied with what was available and 40% were quite satisfied. Ratings for offline information were lower, with 30% of those who had looked for offline information when planning their trip saying they were very satisfied and 48% saying they were quite satisfied. The main reason for being dissatisfied with the availability of offline information was the lack of general information via brochures and guidebooks.

7.2 Comparisons with other islands

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

8. Source of Information during Visit

8.1 The Outer Hebrides

The main sources of information during visits were asking local people (39%), using a smartphone/internet on a mobile phone (35%), Visitor Information Centres (31%), a laptop (27%), brochures (26%), local heritage information leaflets (25%) and iPad/tablet/PC (24%). Holiday visitors were much more likely than VFR or business visitors to find out information during their visit: most notably over 40% had visited a Visitor Information Centre and a third had referred to a brochure.

8.2 Comparisons with other islands

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

9. Communication

9.1 The Outer Hebrides

During their trip to the Outer Hebrides, 41% of visitors had communicated about their visit on social media: the main activity was uploading photos or updating their status on Facebook. There was a clear difference in age-groups with younger respondents much more likely than older respondents to post pictures from their visit online and update their Facebook status whilst on their visit.

Satisfaction with mobile phone reception was reasonable: 54% of visitors were very or fairly satisfied with reception, but 26% were very or fairly dissatisfied. The main reason for dissatisfaction with mobile phone reception was the 'patchy' phone connection or complete lack of connection.

Satisfaction with the availability of WiFi/broadband was similar to the satisfaction with mobile phone reception: 51% of visitors were satisfied and 26% were dissatisfied. The main reasons for dissatisfaction with WiFi/broadband were the very limited access to WiFi and the slowness of connections. It should be noted that this is not just an island issue as satisfaction with mobile phone reception and WiFi was similar in the most recent Scotland-wide VisitScotland visitor survey.

9.2 Comparisons with other islands

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

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

10. Transport

10.1 The Outer Hebrides

98% of visitors had used the same mode of transport for arrival and departure, with only 2% using different methods for arrival and departure.

Satisfaction with the facilities and services at all the main ferry and airport terminals was high: approximately three quarters of visitors were very satisfied with the facilities and services.

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

There were reasonably positive levels of satisfaction with the cost of travel to the Outer Hebrides: three quarters of visitors were very or fairly satisfied with the cost. Business visitors expressed the lowest levels of satisfaction with a fifth saying they were very or fairly dissatisfied, with the key issue being the price of flights. Satisfaction with the cost of travel in the Outer Hebrides was similar to satisfaction with the cost of travel to the islands, with business visitors more likely than holiday or VFR visitors to be dissatisfied with the cost of travel within the Outer Hebrides, the main issue being the cost of fuel.

Visitors were reasonably satisfied with the value for money and quality of public transport, with approximately a third saying they were very satisfied and 40% saying they were quite satisfied with both these aspects of travel. Comments suggested that infrequent bus services, the cost of inter-island ferries and lack of information on public transport were the main issues for visitors.

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

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

11. Accommodation

11.1 The Outer Hebrides
The most popular type of accommodation was hotels, with just over a quarter of visitors (27%) staying in hotels during their stay. The next most popular accommodation types were guest house/B&B, self-catering and staying with friends/family. The use of accommodation varied significantly by type of visitors:

- a quarter of holiday visitors stayed either in a hotel, guest house/B&B or self-catering.
- the main type of accommodation for VFR visitors was, not surprisingly, staying with friends and relatives: two thirds of VFR used this type of accommodation. The other main type used by VFR visitors were self-catering (14%)
- business visitors were most likely to stay in hotels, with approximately 29% staying in 3 star hotels, or in guest houses/B&Bs

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

Over 90% of visitors staying overnight in paid for accommodation said the type and quality of accommodation they wanted was available when they booked. Satisfaction with the actual quality and customer service remained reasonably high amongst holiday and VFR visitors, but business visitors were less likely to be satisfied, with the quality of hotel and guest house/B&B accommodation being the key issue. The area that visitors were least satisfied with was the value for money of accommodation, with VFR and business visitors less satisfied than holiday visitors. Reasons for dissatisfaction were the perception that accommodation was over-priced and lacked facilities.

11.2 Comparisons with other islands

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

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

12 Activities during Visit

12.1 The Outer Hebrides

Overall, Callanish Stones (54%) was the attraction most likely to be visited by visitors with Luskentyre/Seilebost beach (34%), Butt of Lewis (32%), Carloway Broch (27%) and Gearrannan Blackhouse Village (26%) the next most popular attractions.

Holiday visitors were more likely than other visitor types to visit attractions: business visitors were unlikely to visit attractions except for the Callanish Stones, which 42% of business visitors had been to during their trip.

The most likely activities for visitors were visiting beaches/coastal scenery, followed by general sightseeing, visiting archaeological sites, walks (both long and short), trying local food and shopping for local craft/produce. As with visitor attractions, holiday visitors were more likely than other visitor types to undertake activities during their visit.

12.2 Comparisons with other islands

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

13. Satisfaction with Visit

13.1 The Outer Hebrides

Visitors' overall satisfaction with their visit was very high: 87% were very satisfied and a further 11% were fairly satisfied, giving a total 98% of visitors stating that they were very or fairly satisfied. Business visitors, however, expressed lower than average satisfaction with their visit (74% very satisfied): this reflects the lower levels of satisfaction with transport and accommodation. The main reasons for dissatisfaction was the limited availability of cafes/restaurants, the poor quality of hotel accommodation, Sunday closing and poor signage/information.

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

Highlights of visits to the Outer Hebrides focussed on the natural environment: scenery, beaches, and 'peace and quiet' were key highlights mentioned. Visitor attractions, particularly the Callanish Stones, were also important to visitors.

Comments from visitors on areas for improvement highlighted travel costs as a key issue for all visitors.

13.2 Comparisons with other islands

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

1. INTRODUCTION AND OBJECTIVES

1. Introduction

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

1.2 Research Objectives

Specific objectives included:

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

2. METHODOLOGY AND SAMPLE

The project involved three separate surveys:

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

Each of these methodologies is explained below.

2.1 Face-to-Face Exit Survey

2.1.1 Methodology for face-to-face survey

The face-to-face exit survey involved interviews with 1,262 respondents (defined as non-residents or not in transit)[1]. The interviews were spread across a twelve month period (October 2012 – September 2013). Table 2.1 displays the number of interviews conducted during each month of the research.

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

Month	No. of interviews
October 2012	47
November	30
December	31
January	21
February	56
March	103
April	92
May	126
June	184
July	215
August	234
September 2013	126
TOTAL	**1,262**

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

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

Day	No. of interviews
Monday	144
Tuesday	127
Wednesday	257
Thursday	124
Friday	300
Saturday	260
Sunday	50
TOTAL	**1262**

Interviews were conducted as visitors were exiting the Outer Hebrides at a number of locations. The total number of interviews was divided between the locations according to an interview schedule based on historical passenger data from the previous 12 month period. This meant

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

that more interviews were completed at busier ferries and airports. The low interview numbers at some exit points do restrict the potential for geographic splits in analysis. In the main, survey results have been analysed at an overall, aggregate level, as the 1,262 interviews provide a very robust sample for analysis.

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

Location	No. of interviews
Stornoway ferry	503
Tarbert ferry	289
Stornoway airport	209
Lochmaddy ferry	105
Lochboisdale ferry	101
Benbecula airport	46
Castlebay ferry	6
Barra airport	6
TOTAL	**1,262**

The number of interviews on Orkney (1328) and Shetland (1259) ensure comparability.

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

Scotinform trained local residents to complete the face-to-face interviews. This training ensured all interviews were completed in accordance with the Market Research Society Code of Conduct. Interviews were conducted on a random 'next person to pass' basis with the birthday rule[2] used to select an individual from a group of visitors.

2.1.2 Profile of face-to-face respondents

Table 2.4 shows that, overall, just under two-thirds of respondents were male and over a third female. In terms of age, nearly three-quarters of respondents were aged 45 years+.

Table 2.4: Profile of face-to-face respondents
Base: all respondents (1,262)

	Number	%
Gender		
Female	443	35
Male	814	65
Age		
16-24	42	3
25-34	172	14
35-44	204	16
45-54	341	27
55-64	269	27
65+	229	18

[2] The birthday rule helps select an individual from a group whose birthday is next or most recent.

2.2 Post Visit Online Survey

2.2.1 Methodology for online survey

An online survey of Outer Hebrides visitors generated 888 responses between October 2012 and September 2013. The online survey (see appendix two) asked respondents about the activities and places they had been to during their visit and their satisfaction with a range of elements of their visit. These topics were appropriate for the online survey as the timing (post visit) allowed respondents to reflect on their visit when rating it.

Respondents who took part in the face-to-face and calibration surveys were asked if they would be prepared to volunteer their email address to receive the online survey. A link to the survey was emailed to volunteers on a month-by-month basis and a prize draw for an iPad was offered to encourage a maximum response. The 888 responses represented a 45% response rate which vastly exceeded the initial aim of 300, ensuring a robust sample for analysis.

On Orkney, the online survey generated 821 responses whilst on Shetland 368 responses were gained.

Table 2.5: Number of online survey responses per month

Month	No. of interviews
October 2012	9
November	6
December	8
January	20
February	54
March	41
April	136
May	119
June	89
July	165
August	171
September 2013	70
TOTAL	**888**

2.2.2 Profile of online respondents

Respondents to the online survey were more likely to be male than female (as in face-to-face survey). The age profile is also similar to that seen in the face-to-face survey with over two-thirds of respondents aged 45 years+.

Table 2.6: Profile of online respondents
Base: all respondents (888)

	Number	%
Gender		
Female	361	41
Male	527	59
Age		
16-24	28	3
25-34	106	12
35-44	138	16
45-54	248	28
55-64	212	24
65+	151	17

2.3 Face-to-Face Calibration Survey

The calibration survey gained 5,467 responses and was conducted between October 2012 and September 2013, with interview shifts scheduled with reference to historical passenger data. Trained local interviewers conducted this survey at the same exit points highlighted in table 2.3, though face-to-face and calibration interviews were not conducted at the same time.

Table 2.7: Number of calibration interviews per month

Month	**No. of interviews**
October 2012	717
November	361
December	267
January	315
February	362
March	299
April	537
May	372
June	425
July	778
August	738
September 2013	296
TOTAL	**5,467**

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

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

On Orkney the calibration survey gained 4,902 responses whilst on Shetland 5,712 people took part.

2.4 Analysis and Reporting

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

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

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

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

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

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- Orkney Islands Council
- Shetland Islands Council
- Highlands and Islands Enterprise
- Visit Scotland

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

3. VOLUME AND VALUE ESTIMATES

3.1 Volume Estimates

3.1.1 Approach

Calibration surveys were undertaken at the three airports and five ferry terminals on the Outer Hebrides. The surveys collected information on whether passengers were visitors or residents of the Outer Hebrides; party size; and, for visitors, what had been the purpose of their visit to the islands. At the airports only passengers using relevant scheduled air services to relevant destinations were included in the visitor interviews and calibration surveys. The calibration data were then factored into the passenger carrying data provided by the transport operators to give numbers of visitors using air and ferry services and broken down by trip purpose.

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

Comparisons are made where relevant with the results of the most recent analysis of the volume and value of visitors from the 2006 Outer Hebrides Tourism Facts and Figures Update. This was a desk-based exercise which used the results of visitor research carried out in 1999 and 2006 ferry and air passenger data. It should be noted that the use of data from 1999 surveys limits the accuracy of the 2006 estimates: they are, however, included in the final section of this chapter for information.

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

3.1.2 Visitor numbers

Table 3.1 gives the estimated visitor numbers for the 12 month period covered by the visitor survey. There were a total of around 218,000 visitors: the vast majority (around 179,000) travelled by ferry.

It is further estimated that around 154,000 (71%) visitors departed the Outer Hebrides from either Lewis or Harris. The remaining 64,000 (29%) exited via one of the airports or ferry terminals in Uist or Barra.

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

Mode	No. of visitors	Share %
Ferry	179,365	82
Air	38,831	18
Total	**218,196**	**100**

3.1.3 Trip purpose
Table 3.2 breaks down visitor numbers by purpose of trip. Within this and subsequent analysis, those who were on a combined business and holiday trip have been classified as "Business" visitors.

Over half (128,000) of all visitors were on holiday with 48,000 visiting friends and relatives and the remaining 41,000 travelling on business.

Table 3.2: Visitor numbers by trip purpose

Purpose	No. of visitors	Share %
Holiday	128,316	59
VFR	48,455	22
Business	41,424	19
Total	**218,196**	**100**

Table 3.3 breaks down visitor numbers by transport mode. Around two thirds (65%) of the visitors who travelled by ferry were on holiday and a further 20% were visiting friends and relatives.

The position was reversed for the air services with approaching half (47%) of visitors using air travel being business visitors and the rest split broadly evenly between holiday and VFR visitors.

Ferries were used by a majority of visitors in each of the three trip purposes. Slightly more than half (56%) of business travellers used the ferry services. However, the proportions of other visitors who did so were much greater: over 90% of holidaymakers, and 80% of those visiting friends and relatives, travelled by sea.

Table 3.3: Visitor numbers by transport mode

Purpose	Holiday	VFR	Business	Total
Ferry	117,283	38,770	23,312	**179,365**
Air	11,034	9,684	18,112	**38,831**
Total	**128,316**	**48,454**	**41,424**	**218,196**

3.2 Value Estimates

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

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

3.2.2 Average expenditure per person per trip

Table 3.4 shows average expenditure per trip for **all visitors**. It also breaks this down by individual categories of spend.

The average spend across all items was £352, within this the highest levels of spend were for visitor accommodation while on the islands and travel to/from the Outer Hebrides.

It is estimated that £245 of the total spend was made in the Outer Hebrides. This has been calculated by deducting the figure (£97) for travel to/from the islands and then, in line with the approach adopted in previous visitor surveys for Shetland and Orkney it was also assumed that half (in this case £9.50) of the total price of a package/inclusive holiday which some visitors bought as part of their visit to the Outer Hebrides would accrue to island businesses.

Over half of the spend in the Outer Hebrides was on accommodation. The other main item was food and drink bought elsewhere.

Table 3.4: Average expenditure per person per trip (£)

Category	**Expenditure**
Travel to/from mainland/departure point	97
Price of package/inclusive holiday	19
Travel costs on the islands	26
Accommodation - including any food and drink at premises	125
Food and drink bought elsewhere	50
Entertainment and Recreation	7
Shopping for gifts, souvenirs, crafts, etc.	24
Other Shopping	2
Miscellaneous Spend	2
Total spend - both on and off the Outer Hebrides	**352**
Total spend - in the Outer Hebrides	**245**

Table 3.5 shows that total spend per trip was highest for business visitors (£485), followed by holiday visitors (£356) and VFR (£228). For business travellers', travelling to/from the Outer Hebrides accounted for 40% of their total trip spend, while it was 36% for VFR visitors.

Business and holiday visitors spent similar amounts on the package/inclusive holiday element: no VFR visitors were on package/inclusive holidays.

When spend per trip in the Outer Hebrides is considered, the averages for business (£279) and holiday visitors (£273) were similar. The VFR figure was markedly lower (£145).

Accommodation spend and travel costs were highest among business visitors. Holiday visitors had the highest spend on shopping for gifts, etc and entertainment and recreation.

Table 3.5: Average expenditure per person per trip (£): by trip purpose

Category	Holiday	VFR	Business
Travel to/from mainland/departure point	72	83	**192**
Price of package/inclusive holiday	24	0	**26**
Travel costs on the islands	25	20	**35**
Accommodation-including any food and drink at premises	139	44	**176**
Food and drink bought elsewhere	54	49	**40**
Entertainment and Recreation	9	6	**2**
Shopping for gifts, souvenirs, crafts, etc.	30	19	**11**
Other Shopping	2	2	**1**
Miscellaneous Spend	2	4	**1**
Total spend - both on and off the Outer Hebrides	**356**	**228**	**485**
Total spend - on the Outer Hebrides	**273**	**145**	**279**

3.2.3 Expenditure on local products and produce

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

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

This may have been challenging for some respondents who may not have known if a specific product or produce was local to the Outer Hebrides and the results shown at Table 3.6 should, therefore, be treated with caution.

Table 3.6 shows that the average total spend on local items was around £23: around three quarters of this was for crafts, with most of the rest on local food. Overall, these results imply that around 9% of total visitor expenditure was on local products and produce.

Table 3.6: Expenditure on local products and produce (£)

Product/produce	Ave spend per trip	Total spend
Crafts	17.58	3,835,008
Food	4.30	937,503
Beverages	1.07	233,794
Total	**22.94**	**5,006,305**

3.2.4 Average expenditure in the Outer Hebrides by visitor type
Table 3.7 presents additional results for particular visitor types. It shows that the average length of stay for all visitors was 5.8 days.

Business visitors had the lowest number of nights (4.4 nights), with the other two trip types at/around six days. Partly because of this, business visitors had the highest average spend per person per day (£63).

As is generally the case, expenditure per day was highest for those who spend the least time in the Outer Hebrides. For example, those staying at least overnight and up to three nights had an average spend of £71 per day, compared with an average spend of £31 for those staying eight nights or more (the average length of stay for those who visit the islands for a minimum of eight nights was around 14 nights).

Table 3.7 also shows that those from the UK outside Scotland had the highest average spend per trip (£332). However, this partly reflects that they stayed a relatively long time on the islands (seven days on average). Overseas visitors did not stay as long (less than five days) as other visitor type: they had the highest average spend *per day* (£55).

Table 3.7: Average expenditure in the Outer Hebrides by visitor type (£)

Type	**Expenditure per trip**	**Length of stay**	**Expenditure per person per day**
All Visitors	**245**	**5.8**	**43**
Trip Purpose			
Holiday	273	6.0	45
VFR	145	6.3	23
Business	279	4.4	63
Length of Stay in the Outer Hebrides			
1-3 nights	143	2.0	71
4-7 nights	262	5.8	45
8+ nights	441	14.1	31
Origin			
Scotland	197	5.4	37
Rest of UK	332	7.0	48
Overseas	264	4.8	55

Table 3.8 shows the variation in spend by length of stay for business visitors. As would be expected, total spend per trip increases with length of stay. The very high spend by those staying at least eight nights reflects an average length of stay of more than 20 nights. There is not, however a marked difference in spend per day. The highest level (£70) is for those staying up to four nights; while that by those who stay longest (£60) is still significant.

Table 3.8: Average expenditure in Outer Hebrides by business visitors (£)

Type	Expenditure per trip	Length of stay	Expenditure per person per day
All Business Visitors	279	4.4	**63**
Length of Stay in Outer Hebrides			
1-3 nights	123	1.8	70
4-7 nights	328	4.9	66
8+ nights	1,274	21.3	60

Table 3.9 shows that among overseas visitors, the highest spend per trip, and per day, was by those on business. A comparison with Table 3.7 shows that the spend of both overseas holiday and business visitors was greater than those from the UK. In contrast, overseas VFR visitors spend less than their UK counterparts.

Table 3.9: Expenditure in Outer Hebrides by overseas visitors

Type	Expenditure per trip	Length of stay	Expenditure per person per day
All Overseas Visitors	**264**	**4.8**	**55**
Trip Purpose			
Holiday	286	4.9	59
VFR	113	5.4	21
Business	289	2.7	106

3.3 Total Volume and Value

Table 3.10 gives estimates of the annual volume and value of visitors to the Outer Hebrides in the period covered by the 2012-2013 survey.

Around 218,000 visitors had a total spend of over £53 million, with around two thirds of that expenditure (almost £35 million) from holiday visitors. Most of the rest (over £11 million) came from business visitors who generate over one fifth of the total impact of visitors to the Outer Hebrides.

Table 3.10: Total annual volume and value (2013)

Purpose	Number of visitors	Average spend per trip (£)	Total spend (£)	Share of total spend %
Holiday	128,316	273	34,977,841	65
Business	41,424	279	11,566,483	22
VFR	48,455	145	7,016,485	13
Total	**218,196**	**245**	**53,560,809**	**100**

Table 3.11 shows volume and value by visitor origin. Scottish residents account for more than half (57%) of visitors and most of the rest are from other parts of the UK. Scottish residents, however, generate less than half (46%) of total spend, reflecting their relatively low spend per trip. Overseas residents account for 13% of visitors and 14% of total spend.

Table 3.11: Total annual volume and value (2013)- by visitor origin

Origin	Number of visitors	Average spend per trip (£)	Total spend (£)	Share of total spend %
Scotland	125,249	197	24,645,937	46
Rest of UK	63,864	332	21,223,282	40
Overseas	29,083	264	7,691,590	14
Total	**218,196**	**245**	**53,560,809**	**100**

Table 3.12 presents the volume and value information shown in the 2006 report. For the reasons discussed earlier this is included mainly for information.

The 2006 spend per trip figure for Holiday & VFR (£258) was above that in 2013 (£238). It is not possible, however, to say whether this is due to a decrease in the average length of stay between 2006 and 2013 or other factors.

In 2013 the number of business visitors (41,424) was less than shown for 2006 (52,364). However, this may well reflect the way in which that was calculated in the 2006 work, rather than an actual decrease.

Adjusting the 2006 total for price inflation (based on the Consumer Price Index) gives a figure of £60,519,090 in 2012-2013 prices. This compares to the 2013 figure of £53,560,809 as shown at Table 3.12.

Thus, total visitor spend in 2013 was around £7.0 million lower than the inflation-adjusted 2006 figure. This reflects a real terms decrease in visitors' average spend per trip, but should be viewed within the context of the general economic downturn from 2009 onwards.

Table 3.12: Total annual volume and value: 2006 report estimate

Purpose	Number of visitors (excl. yachts)	Average spend per trip (£)	Total spend (£)	Share of total spend %
Holiday & VFR	137,412	258	35,477,030	72
Business	52,364	265	13,854,467	28
Total	**189,776***	**260**	**49,331,497**	**100**

Note: Not adjusted for price inflation between 2006 and 2013

4. PROFILE OF VISITORS

Face-to-face survey respondents were asked to provide information on the gender and age of the people they were visiting the Outer Hebrides with. In all, respondents provided information on 2,822 visitors.

4.1 Gender Profile

Overall, 55% of visitors were male and this pattern was reflected across the research period with more male than female visitors recorded in each quarter, particularly between January-March. The differences in gender between July-September are smaller, suggesting a more even gender profile in these summer months.

Table 4.1: Gender of visitors
Base: all face-to-face visitors (2,822)

	%
Female	45
Male	55

Chart 4.1: Gender of visitors – by quarter
Base: all visitors (2,822)

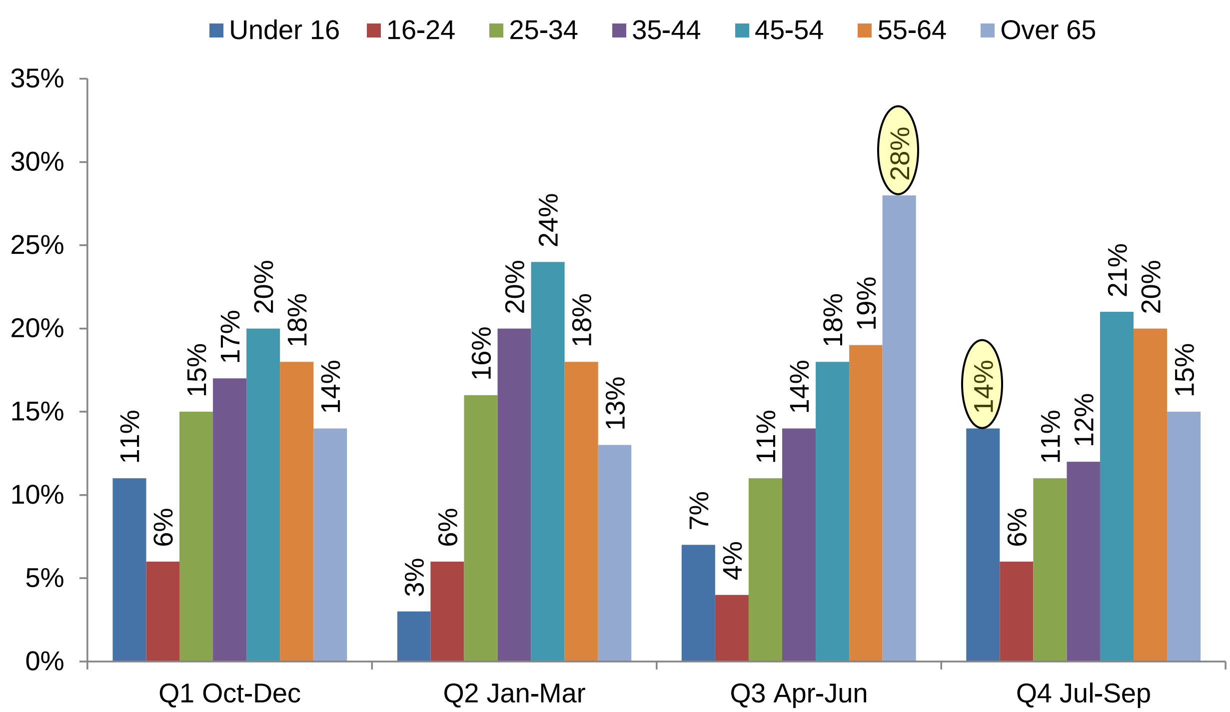
4.2 Age Profile

Table 4.2 shows that three-fifths of visitors were aged 45 years+ (59%). However, when viewed by quarter the visitor age profile displays some noticeable variations. Chart 4.2 highlights how the age profile of respondents changed as the research period progressed, for instance with significantly more respondents aged 65+ between April-June and a peak percentage of under 16s between the summer months of July-September. The impact of these changes is that between April-September visitors aged 25-44 make up a smaller proportion of visitors than they do between October-March.

Table 4.2: Age of visitors
Base: all face-to-face visitors (2,822)

	%
Under 16	10
16-24	6
25-34	12
35-44	14
45-54	21
55-64	19
65+	19

Chart 4.2: Age of visitors – by research quarter
Base: all face-to-face visitors (2,822)



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

4.3 Residence Profile

Almost three-fifths (58%) of respondents were from Scotland with just under three-tenths from elsewhere in the UK/Ireland. Quarterly results show that more respondents came from the UK/Ireland between April-June and there was a slight increase in the proportion of visitors from Europe and the rest of the world between July-September. The impact of these changes was to reduce the proportion of respondents from Scotland during the April-September period.

Chart 4.3: Residence of Respondents
Base: all face-to-face respondents (1,262)

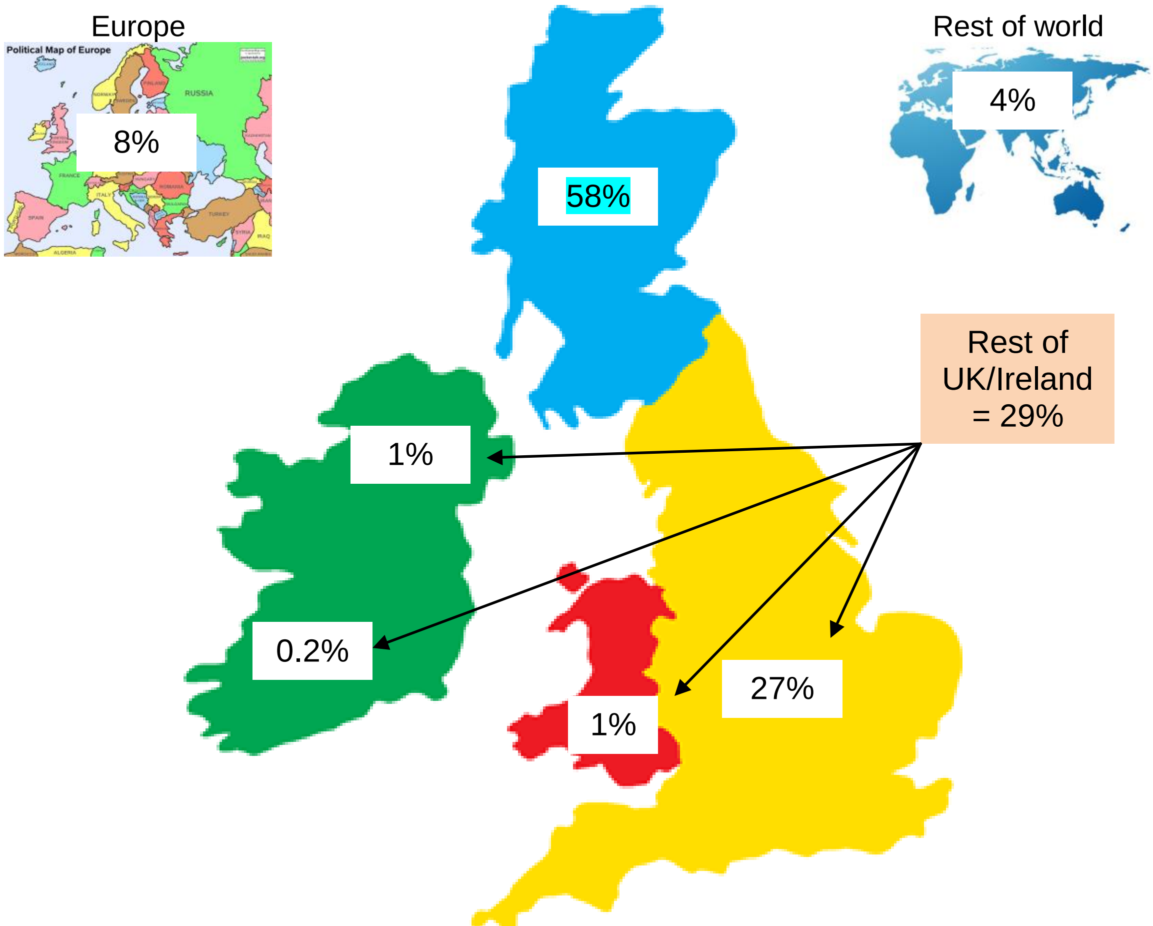


Table 4.3: Residence of respondents – by quarter
Base: all face-to-face respondents (1,262)

	Q1 % Oct-Dec	Q2 % Jan-Mar	Q3 % Apr-Jun	Q4 % Jul-Sep
Scotland	68	69	54	56
Rest of UK/Ireland	22	23	34	28
Europe	3	6	8	11
Rest of world	5	4	3	5

The table below displays the residence of respondents in more detail and highlights that from Europe, a range of countries were represented by respondents, whilst from the rest of the world, Americans, Australians and Canadians accounted for most respondents. Excluding the UK and Ireland, 21 other countries were represented by respondents during the research period.

Table 4.4: Residence of respondents – Detailed results
Base: all respondents (1,262)

	%
Scotland	58
Rest of UK	29
- England	*27*
- Wales	*1*
- Northern Ireland	*1*
- Republic of Ireland	*
- Other UK e.g. Isle of Man	*
Europe	8
- Germany	*3*
- The Netherlands	*2*
- France	*1*
- Switzerland	*1*
- Italy	*
- Spain	*
- Austria	*
- Belgium	*
- Other Europe	*1*
Rest of world	4
- USA	*1*
- Australia	*2*
- Canada	*1*
- Other country	*

Other Europe: Cyprus, Czech Republic, Denmark, Hungary, Norway, Poland, Sweden (1).
Other country: UAE (2), Egypt, Kuwait (1)

Within Scotland respondents were most likely to be residing in the Highlands (26%) or Glasgow city (11%) with these two areas accounting for nearly two-fifths of all Scottish respondents.

Table 4.5: Residence of respondents – Detailed results on Scottish residence
Base: all Scottish based respondents (733)

	%
Highland	26
Glasgow City	11
Edinburgh, City of	8
Aberdeenshire	4
Perth & Kinross	5

Table 4.5: Residence of respondents – Detailed results on Scottish residence *(Continued)*
Base: all respondents resident in Scotland (733)

	%
Argyll & Bute	5
Fife	4
Aberdeen City	3
South Lanarkshire	3
North Lanarkshire	3
Moray	2
Stirling	2
Scottish Borders	2
East Lothian	2
North Ayrshire	2
Renfrewshire	2
East Dunbartonshire	2
Angus	1
Dundee City	1
Falkirk	1
Dumfries & Galloway	1
West Lothian	1
East Ayrshire	1
South Ayrshire	1
West Dunbartonshire	1
Clackmannanshire	1
East Renfrewshire	1
Inverclyde	1
Midlothian	1
Shetland	*

English respondents resided in a range of areas with no-one area dominating the results.

Table 4.6: Residence of respondents – Detailed results on English residence
Base: all respondents resident in England (339)

	%
North West	19
South East	16
South West	12
Greater London	11
Yorkshire/Humberside	11
North East	10
East Midlands	8
West Midlands	8
East Anglia/East of England	4

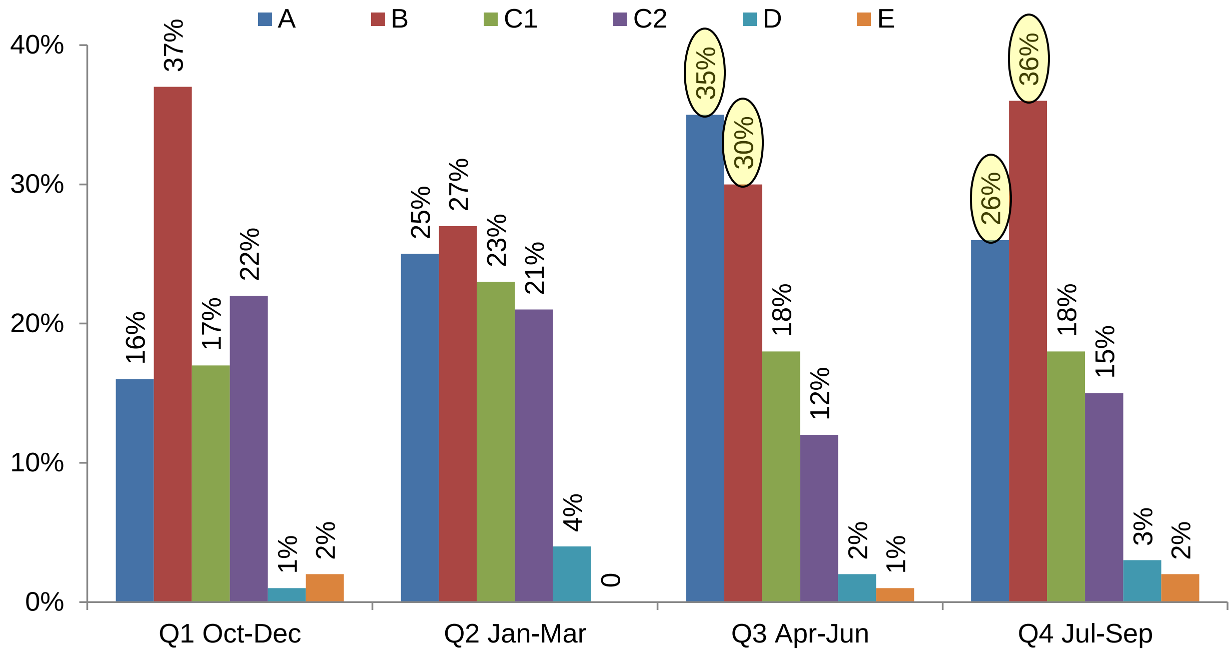
4.4 Socio-economic Profile

Social grades A and B accounted for over three-fifths of respondent households. This trend was evident across the research period, particularly between April-September, as displayed in chart 4.4.

Table 4.7: Social grade of respondents
Base: all face-to-face respondents (1,262)

	%
A – upper middle class	28
B - middle class	33
C1 – lower middle class	19
C2 – skilled working class	15
D – working class	3
E - those at lowest level of subsistence	1

Chart 4.4: Social grade of respondents – by research quarter
Base: all face-to-face respondents (1,262)



4.5 Group Profile

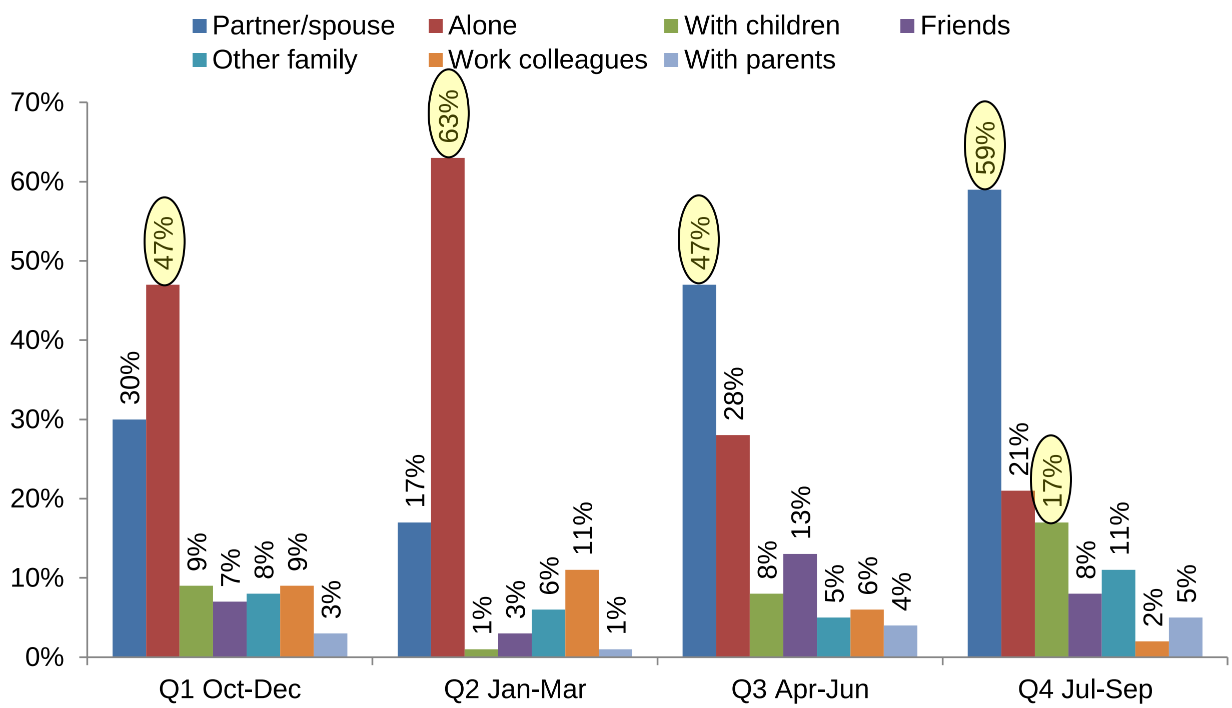
Nearly half of respondents were visiting with a partner/spouse whilst a third where travelling alone. These groups accounted for nearly four-fifths of all respondents. Across the research period these two types of groups accounted for the majority of respondents but there were some notable quarterly variations, with a higher proportion of respondents travelling alone between October-March and then more respondents visiting with their partner/spouse between April-September. Visits with children increased between July-September coinciding with the school holiday period.

Table 4.8: Group profile of respondents
Base: all face-to-face respondents (1,262)

	%
Partner/spouse	47
Travelling alone	32
With child/children	11
Friends	9
Other members of family	8
Business/work colleagues	5
With parents/partners parents	4

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

Chart 4.5: Group profile of respondents – by research quarter
Base: all face-to-face respondents (1,262)



4.6 Profile of Visitors – Island Comparisons

Table 4.9 displays the profile of visitors on each of the three island groups. The results show some similarities and differences:

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

Table 4.9: Profile of Visitors – by Island
Base: all visitors

	Orkney %	Outer Hebrides %	Shetland %
Gender			
Female	45	45	40
Male	55	55	60
Age			
Under 16	7	10	3
16-24	6	6	12
25-34	11	12	16
35-44	13	14	12
45-54	18	21	19
55-64	22	19	17
65+	23	19	20
Residence			
Scotland	43	58	48
Rest of UK/Ireland	31	29	33
Europe	14	8	11
Rest of world	11	4	8
Social grade			
A – upper middle class	32	28	17
B - middle class	30	33	32
C1 – lower middle class	19	19	26
C2 – skilled working class	12	15	16
D – working class	3	3	4
E - lowest level of subsistence	2	1	2

Table 4.9: Profile of Visitors – by Island *(Continued)*
Base: all visitors

Group type			
Travelling alone	37	32	53
Partner/spouse	37	47	21
Friends	12	9	7
Other members of family	8	8	6
Business/work colleagues	4	5	10
With child/children	6	11	2
With parents/partner's parents	1	4	1

5. TYPE OF VISIT

5.1 Main Type of Visit

With reference to a pre-coded list, respondents selected the option which best described their visit to the Outer Hebrides. Face-to-face survey results show that holiday/short break involving an overnight stay was clearly the main type of visit taken, accounting for just over half of respondents.

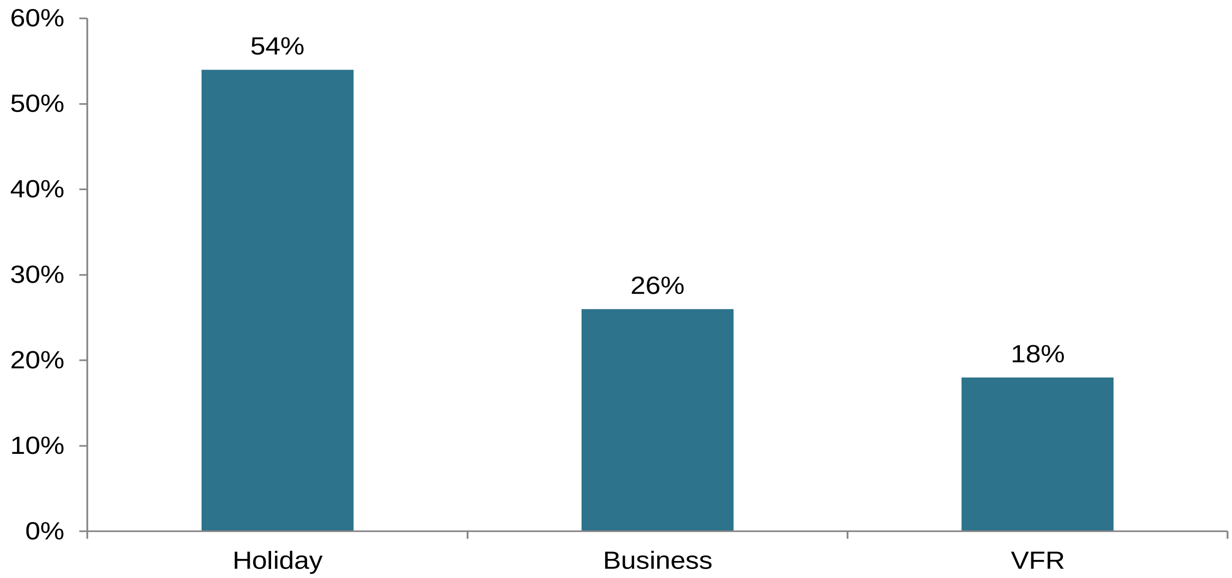
The online survey gave visitors an additional opportunity to provide some more detailed feedback on their visitor experience. Respondents to this survey were also asked about type of visit: the proportion of holiday visitors was similar to the face-to-face survey, but fewer had visited for business purposes.

Table 5.1: Main type of visit
Base: all face-to-face (1,262) and online (888) respondents

	Face-to-face	Online
	%	%
Holiday/short break involving staying overnight	53	54
On business - overnight trip	21	11
Visiting friends/relatives for leisure/holiday – overnight	17	13
On business - day trip	5	2
Combining business and holiday	2	3
Visiting friends or relatives for leisure/holiday - day trip	1	5
Holiday - day trip	1	6

The above results help establish the percentage of respondents making holiday, business or VFR type visits. Chart 5.1 highlights the predominance of holiday visits amongst face-to-face Outer Hebrides respondents.

Chart 5.1: Main type of visit
Base: all face-to-face respondents (1,262)



5.1.1 Type of visit – by research quarter

The percentage of respondents on holiday visits increased significantly between April-September (compared to October-December), whilst in contrast the percentage of respondents on business peaked between January-March and then decreased during the remainder of the research period. The proportion of VFR respondents remained quite consistent throughout the duration of the research.

Table 5.2: Main types of visit – by quarter
Base: all face-to-face respondents (1,262)

	Q1 % Oct-Dec	Q2 % Jan-Mar	Q3 % Apr-Jun	Q4 % Jul-Sep
Holiday	34	17	57	65
Business	42	57	24	15
VFR	21	22	16	18

5.2 Frequency of Visit

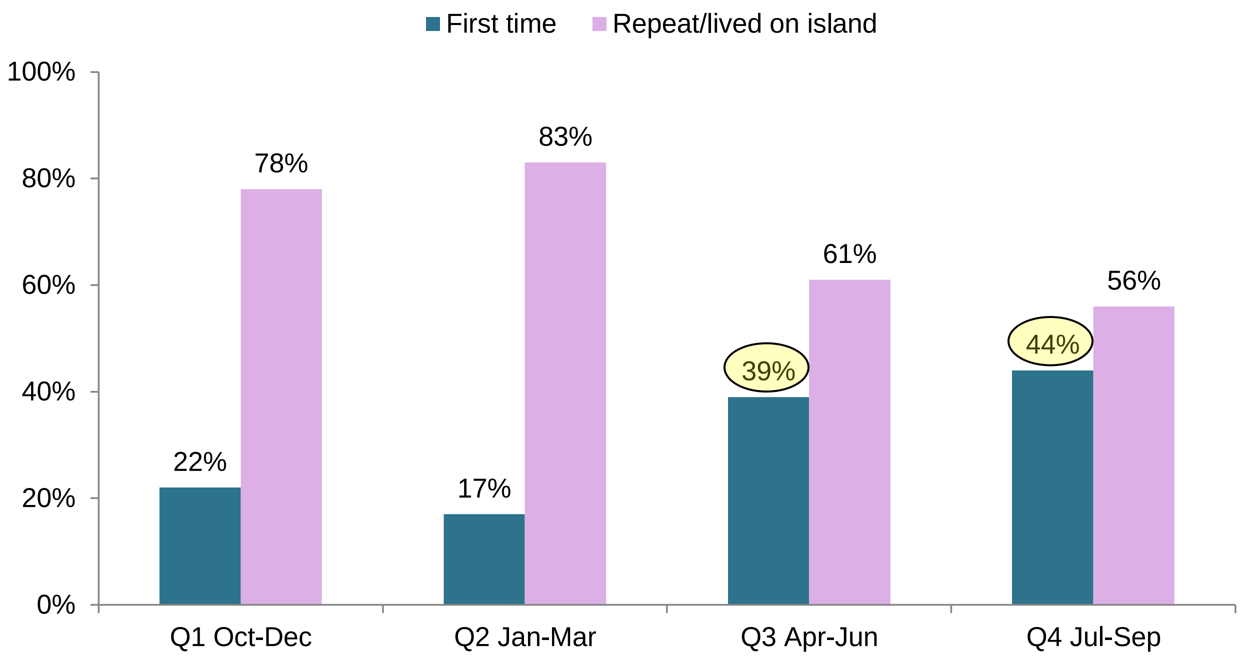
Viewed by visit type, first time and repeat visits can be further analysed. Respondents visiting for the first time were more likely to be on holiday (53%) than business (23%) or VFR (9%) whilst respondents on a repeat visit were very likely to be on a VFR or business visit.

Table 5.3: Frequency of visit – total and by type of visit
Base: all face-to-face respondents (1,262)

	Total %	Holiday %	VFR %	Business %
This is my first visit	37	53	9	23
Repeat visit / lived on island	62	48	91	76
- Once before	*10*	*14*	*4*	*8*
- Twice	*4*	*5*	*5*	*2*
- 3-5 times	*9*	*9*	*9*	*10*
- 6-10 times	*6*	*4*	*6*	*10*
- More than 10 times	*25*	*12*	*41*	*42*
- Lived on island	*8*	*4*	*26*	*4*

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

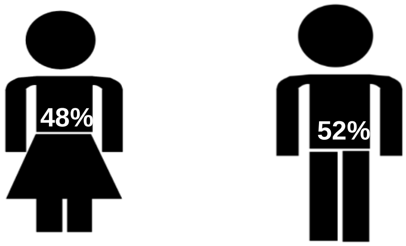
Chart 5.2: Frequency of visit – by quarter
Base: all face-to-face respondents (1,262)



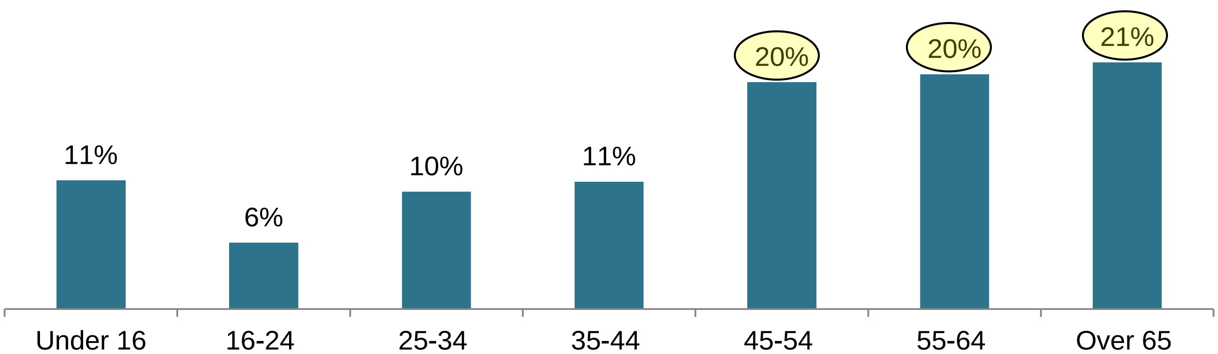
A profile of each of the main visit types is presented in sections 5.2.1 to 5.2.3.

5.2.1 Main type of visit – holiday

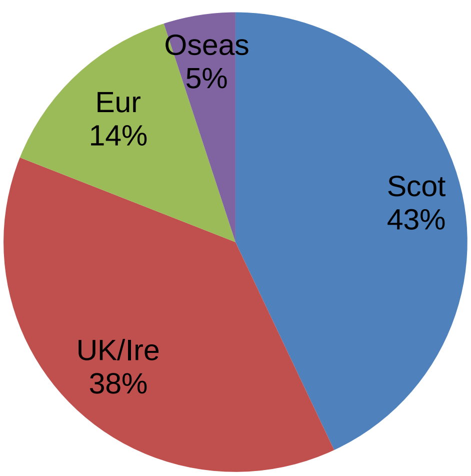
Respondents on holiday[3] were almost equally likely to be male or female and just over half were making their first visit to the Outer Hebrides.

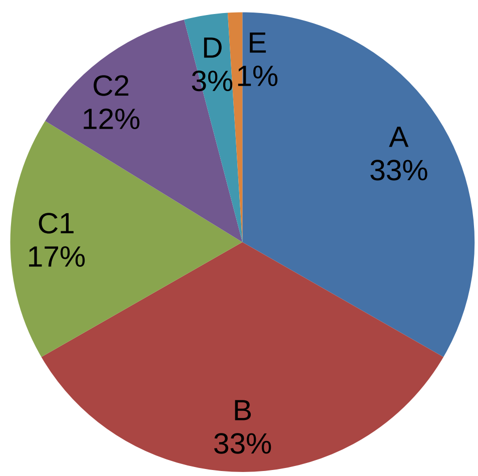


Three-fifths of respondents on holiday were aged 45+.



Just over four-fifths of holiday respondents were from Scotland or the rest of the UK/Ireland. The A and B social grades accounted for exactly two-thirds of respondents.



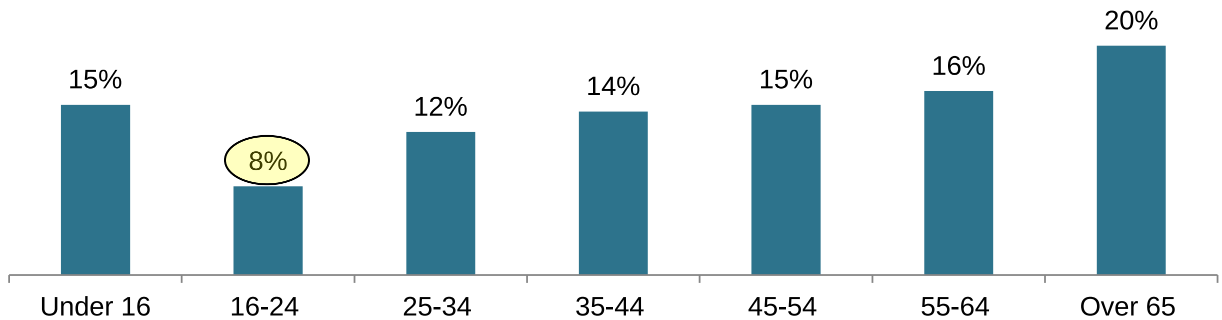


[3] Gender/Age based on 1,731 visitors. Frequency/Residence/Social grade based on 670 respondents.

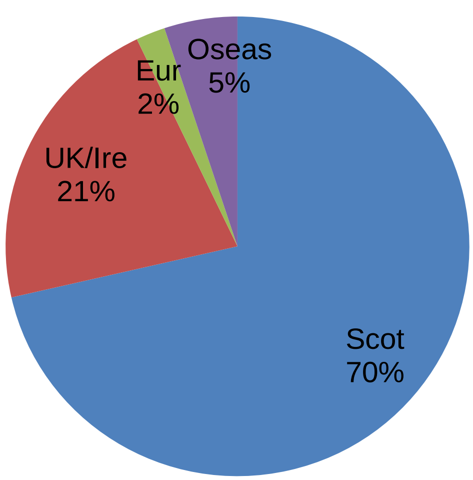
5.2.2 Main type of visit – VFR

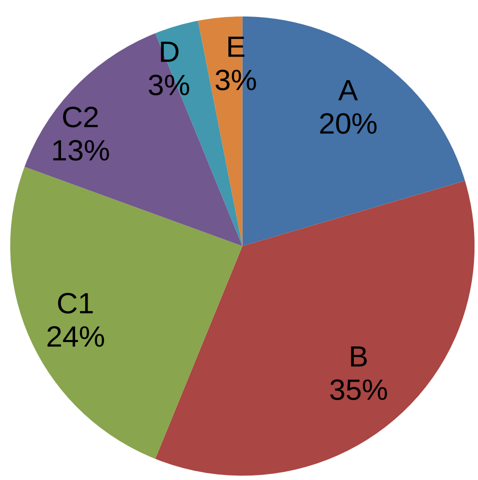
VFR respondents[4] were almost as likely to be female as male and the vast majority were making a repeat visit to the Outer Hebrides.

VFR respondents displayed a range of age with only 16-24 year olds less represented.



Seven-tenths of VFR respondents were from Scotland and a fifth were from the rest of the UK or Ireland. Over half the respondents (55%) occupied social grades A and B, with a further quarter being classified as C1.



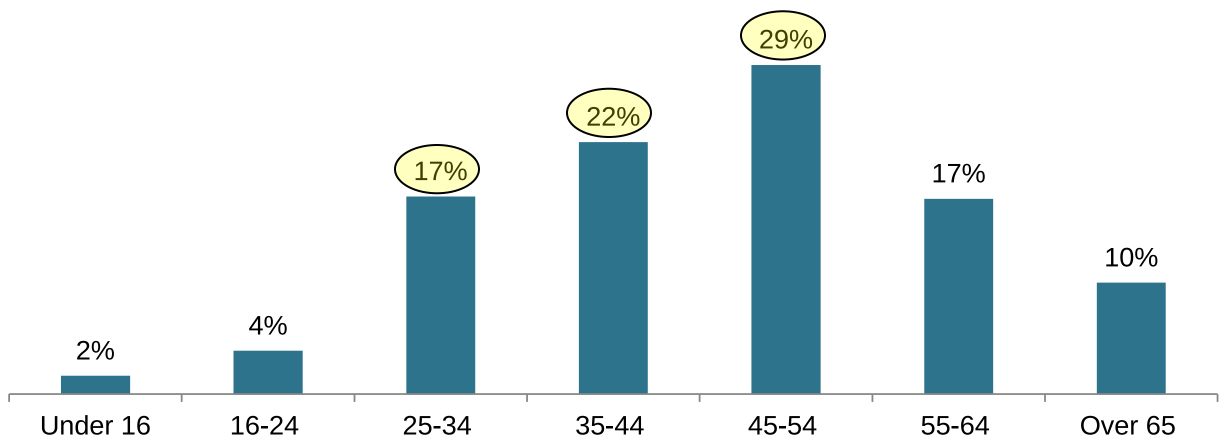


[4] Gender/Age based on 506 visitors. Frequency/Residence/Social grade based on 230 respondents.

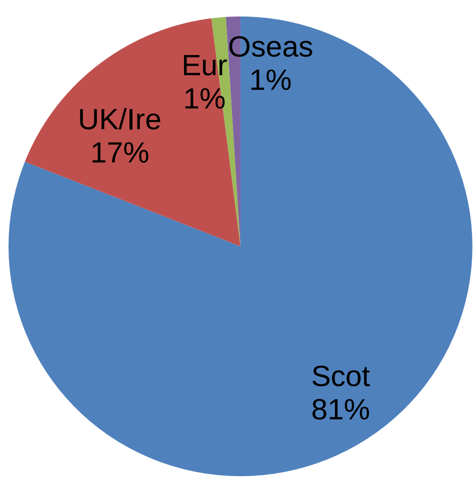
5.2.3 Main type of visit – business

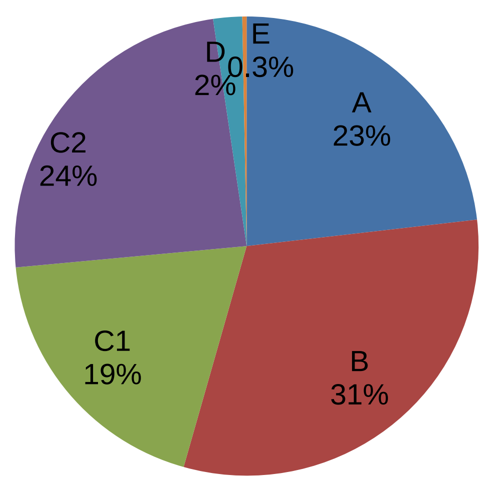
Respondents on business[5] were much more likely to be male than female and over three-quarters were making a repeat visit to the Outer Hebrides.

Nearly seven-tenths of business respondents (68%) were aged between 25 and 54.



Four-fifths of business respondents were from Scotland with very few from outside the UK/Ireland. Over half the respondents (54%) occupied social grades A and B, with a further two in five (43%) being classified as C1 or C2.



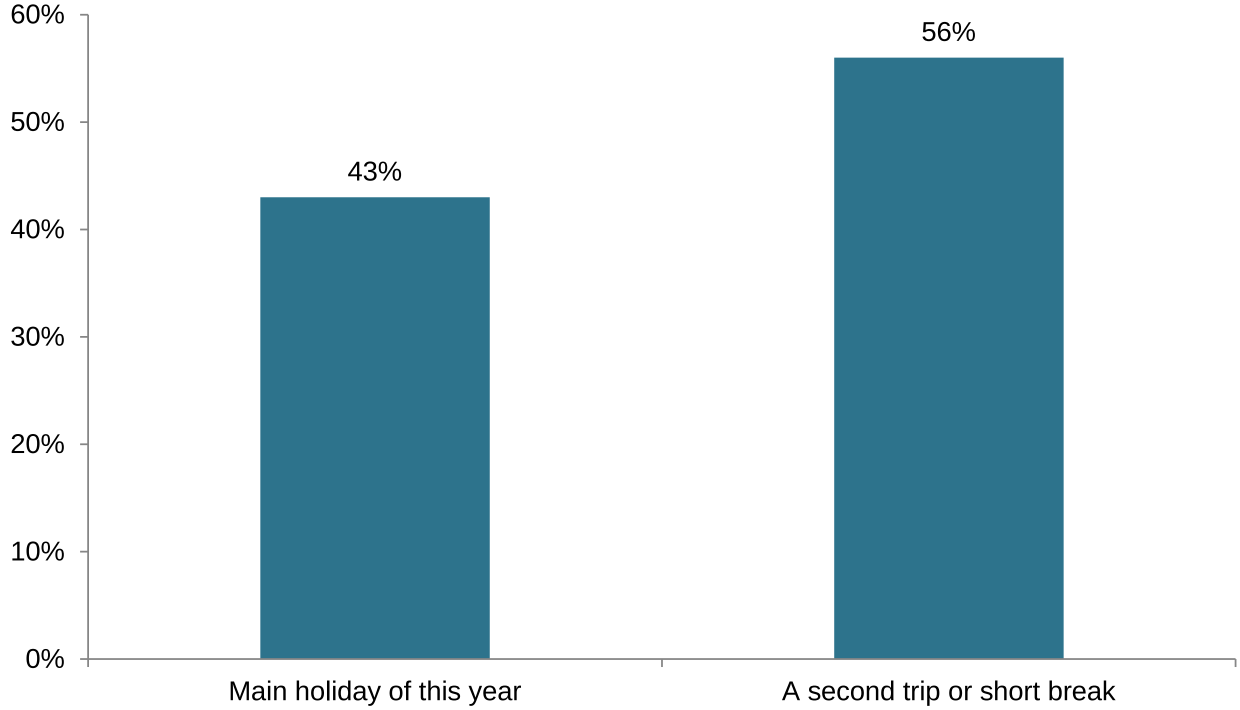


[5] Gender/Age based on 334 visitors. Frequency/Residence/Social grade based on 528 respondents.

5.3 Overnight Visits

Respondents who were on an overnight visit described as a holiday/short break or VFR were asked whether the visit was their main holiday for the year or a second holiday/short break. Chart 5.3 shows that overnight holiday/VFR visits were most likely to be second trips or short breaks, though it is encouraging that over two-fifths of respondents regarded their visit to the Outer Hebrides as their main holiday of the year.

Chart 5.3: Type of visit – by overnight holiday/VFR
Base: face-to-face respondents staying overnight on holiday or VFR (879)



5.4 Business Visits

Respondents who were on a business trip (overnight or day trip) were asked about the industry that they worked in. Building/construction and Government/local government accounted for nearly a fifth of respondents, though a wide range of industries were highlighted.

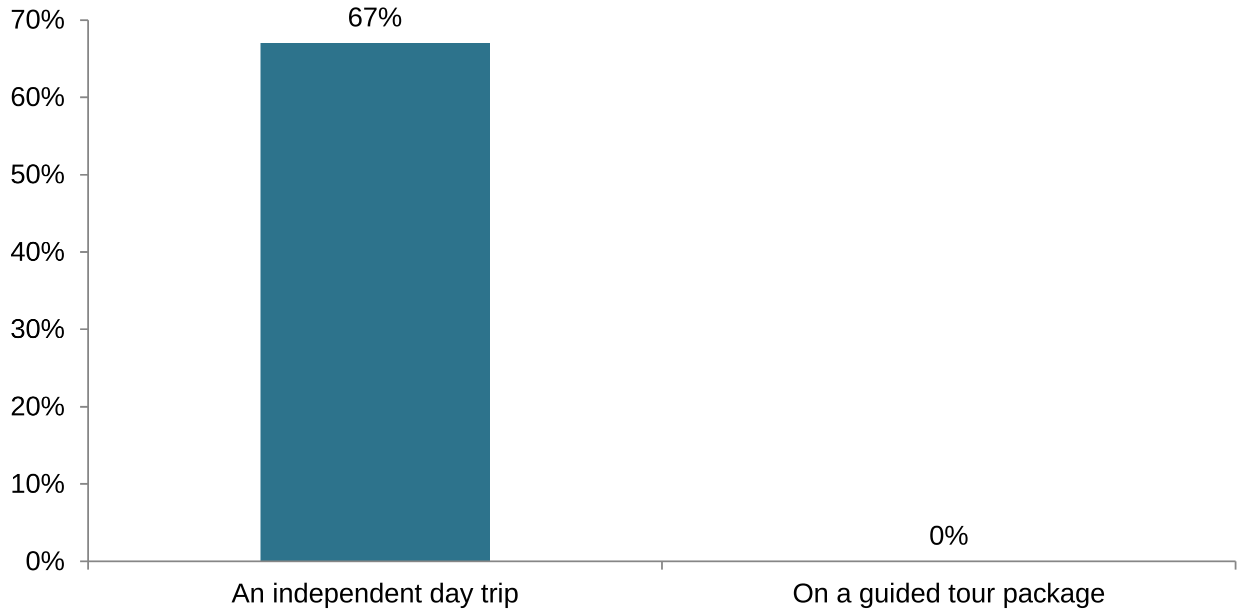
Table 5.4: Profile of respondents – Industry worked in
Base: face-to-face respondents on a business visit - day trip or overnight (358)

	%
Building/Construction	9
Government/local government	8
Health services	7
Renewable energy	5
Financial services	4
Engineering	4
Fishing/ fish farming/aquaculture	4
Transport - shipping etc..	3
Retail sales/service	3
IT	3
Industrial manufacturing	3
Media	3
Oil and gas	2
Food/drink manufacture	2
Tourism	2
Education	2
Electrical	2
Ministry of Defence	1
Air	1
Charity	1
Religion	1
Water	1
Fire	1
Legal	1
Other	27

5.5 Day Trip Visits

Respondents who were on a day trip described as a holiday or VFR were asked whether this was part of a guided tour package or an independent day trip. For all the respondents who answered this question the visit was the latter, though a number of respondents did not provide an answer. These respondents were almost equally likely to be travelling by flight or ferry with the Lochmaddy to Uig route used by around half of respondents. It should be noted that the low sample size means these observations should be treated with caution.

Chart 5.4: Type of visit – by day trip holiday/VFR
Base: face-to-face respondents on a day trip for holiday/VFR (21)



Note: please note low base figure for the chart.

5.6 Length of Visit

The average length of stay in the Outer Hebrides was 5.7[6] nights with a further 2.6 nights spent elsewhere in Scotland and an average of 8.8 nights in total spent away from home. There are some notable variations by visit type with holiday and VFR respondents spending longer in the Outer Hebrides than business respondents.

Table 5.5: Average no. nights away from home – total and by visit type
Base: all face-to-face respondents (1,262)

	Total	Holiday	VFR	Business
In The Outer Hebrides	5.7	6.1	6.5	3.8
Elsewhere in Scotland	2.6	4.1	1.2	0.7
Total trip away from home	8.8	11.0	7.9	4.5

[6] Figure differs from that shown in section 3 as it has not been weighted for volume and value calculations.

5.7 Areas Visited

Lewis (including Great Bernera) was the area that most respondents had visited, followed by Harris (including Scalpay). Lewis was visited by all respondent types but Harris was more likely to be visited by holiday respondents (61%) than VFR (28%) or business (22%). Three-fifths of respondents stayed for a night or more in Lewis compared to three-tenths who stayed in Harris. Of note, nearly all respondents who visited Barra also stayed there for at least a night.

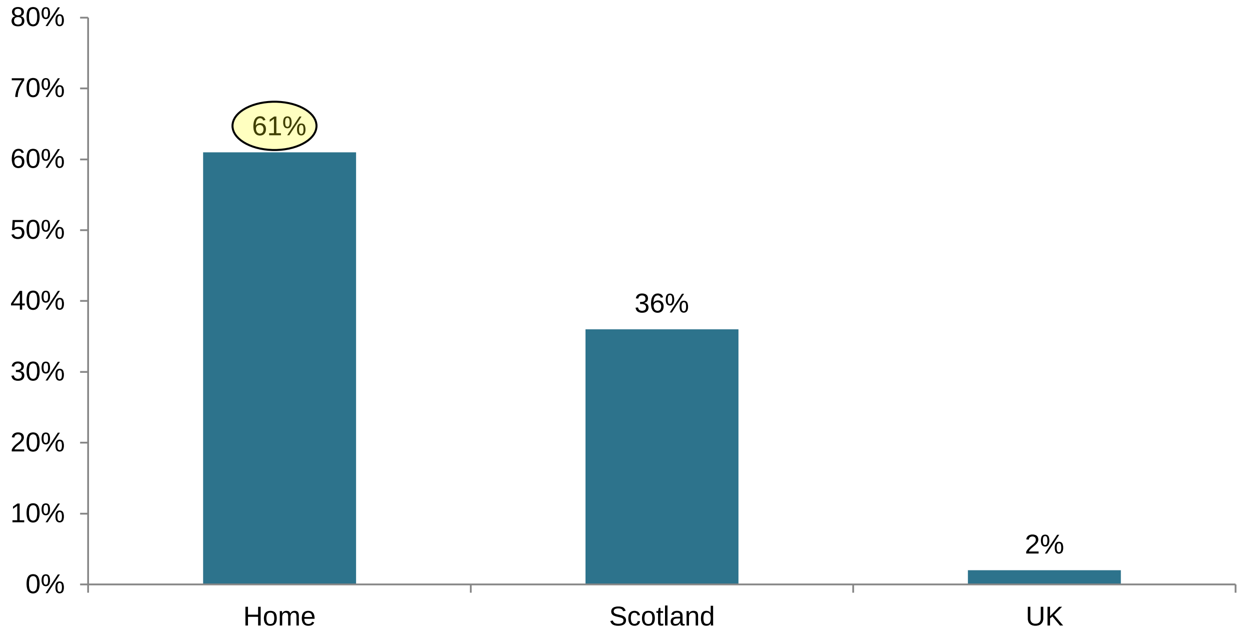
Table 5.6: Average nights away from home – by area visited
Base: all face-to-face respondents (1,262)

	Visited %	Stayed %
Lewis (including Great Bernera)	74	61
Harris (including Scalpay)	44	30
South Uist	23	14
North Uist (including Berneray)	22	15
Benbecula	20	6
Eriskay	12	2
Barra (including Vatersay)	9	8

5.8 Post Visit Destination

At the end of their visit, three-fifths of respondents were travelling home, with VFR and business respondents (both 81%) more likely to do so than respondents on holiday (44%). Over half of holiday respondents (54%) were travelling elsewhere in Scotland, whilst only 16% of business and VFR respondents did so.

Chart 5.5: Post visit destination
Base: all face-to-face respondents (1,262)



5.9 Type of Visit – Island Comparisons

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

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

Table 5.7: Profile of visitor types (1)
Base: all visitors

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

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

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

Table 5.8: Profile of visitor types (2)
Base: all respondents

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

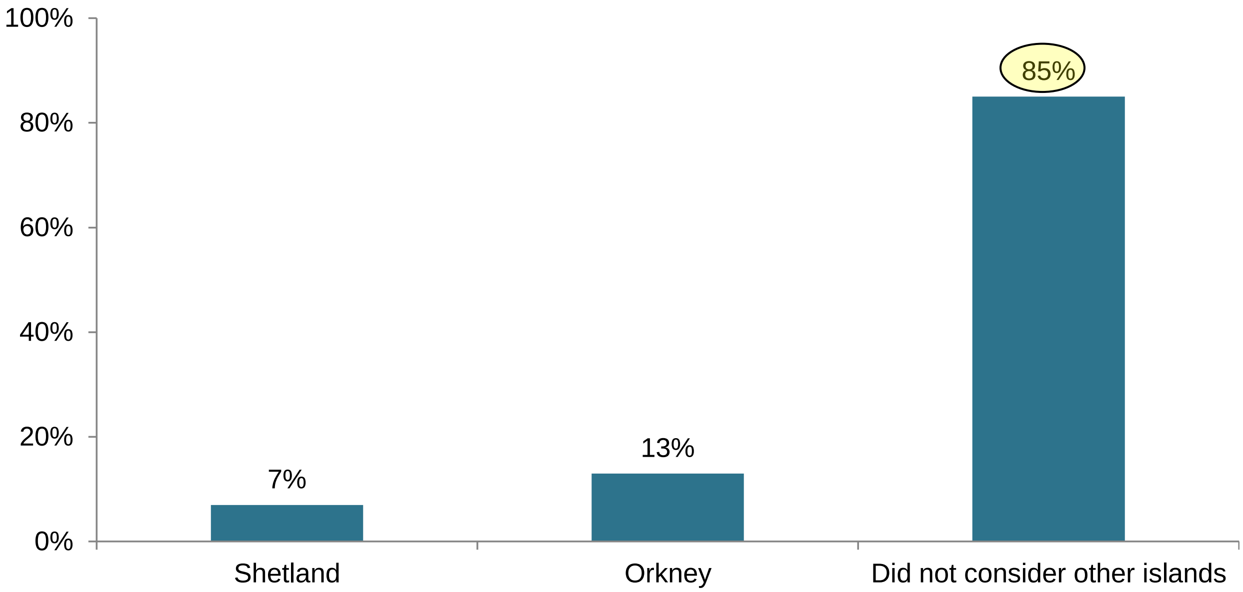
6. PLANNING THE VISIT

6.1 Other Islands Considered

The majority of respondents did not consider either Orkney or Shetland before choosing to visit the Outer Hebrides. Over a tenth of respondents (holiday and VFR) had considered a visit to Orkney whilst 7% thought about visiting Shetland.

Perhaps unsurprisingly it was those on holiday that were most likely to consider an alternative destination, with 16% of this sub-group considering Orkney and 9% Shetland.

Chart 6.1: Other islands considered
Base: online respondents on holiday or VFR (743)



Respondents from Europe and the rest of the world were most likely to consider an alternative destination, with over a quarter of respondents from Europe and over a fifth of respondents from the rest of the world having thought about visiting Orkney. Some respondents considered both of the other island groups, hence the percentages for each type of resident adding up to more than 100% in the table below.

Table 6.1: Other islands considered – by respondent residence
Base: online respondents on holiday or VFR (743)

	Scotland %	UK/Ire %	Europe %	RoW %
Shetland	5	8	12	10
Orkney	8	13	27	22
Did not consider other islands	91	85	70	75

6.2 Influences on Visit

Half of respondents (holiday or VFR) highlighted that an interest in scenery/landscape had influenced their decision to visit the Outer Hebrides, whilst for nearly two-fifths a previous visit or their knowledge of the area was an influence.

Table 6.2: Influences on visit
Base: online respondents on holiday or VFR (743)

	%
Interest in scenery/landscape	50
Experience of previous visit/know area	39
Family connections with the area	25
Interest in the archaeology/history	21
Recommendation from friend/relative	19
Internet/website	15
Specific activities such as walking or golf	15
To undertake particular activities	10
Guide books	10
Interest in particular attractions	8
Radio or TV programme about the Outer Hebrides	7
Tourist Brochure	7
To stay in particular accommodation	6
A film/movie or book featuring the area	4
Newspaper or magazine article	3
Particular events/festivals	2
None of these	1
Newspaper or magazine advertisement	1
Radio/TV advertisement about the Outer Hebrides	*
Social media (Facebook/Twitter)	*
Other reason	7

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

Table 6.3: Influences on visit – by respondent residence
Base: online respondents on holiday or VFR (743)

	Scotland %	UK/Ire %	Europe %	RoW %
Interest in scenery/landscape	41	54	75	57
Experience of previous visit/know area	44	41	21	20
Family connections with the area	38	16	4	22
Interest in the archaeology/history	18	21	27	31

6.3 Timing of Trip Planning

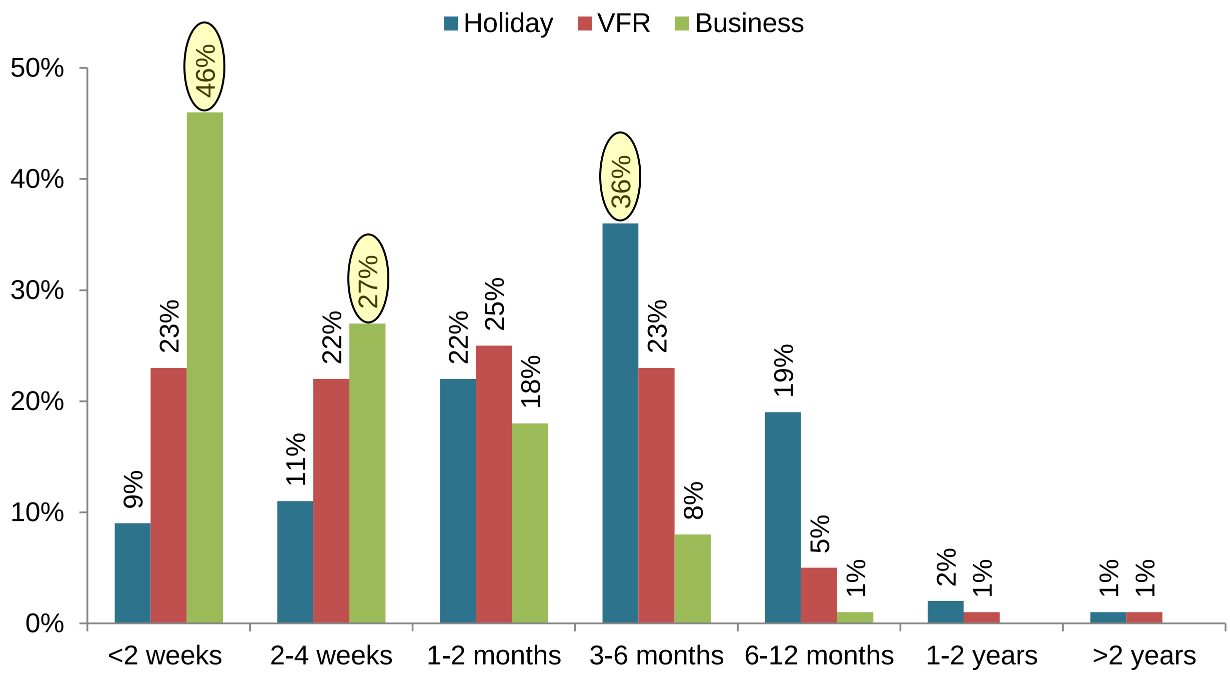
Overall, respondents displayed a variety of approaches to the planning of their trip with just over a third (34%) planning 4 weeks before their trip and just over two-fifths (43%) planning at least three months in advance.

Table 6.4: Timing of trip planning
Base: all online respondents (888)

	%
Less than 2 weeks	18
2-4 weeks	16
1-2 months	22
3-6 months	29
6-12 months	13
1-2 years	1
More than 2 years	*

There are some obvious differences between type of respondent and planning of trips, as displayed in chart 6.2. Holiday respondents were most likely to begin planning their trip 3-6 months in advance whereas VFR respondents displayed no real preference in terms of the timing of their planning. Business respondents were much more likely to plan their trip at short notice, with nearly three-quarters planning their trip within 4 weeks of their visit.

Chart 6.2: Timing of trip planning
Base: all online respondents (888)



6.3.1 Timing of trip planning – domestic vs international

The table below highlights the timing of trip planning for domestic (Scotland, UK/Ireland) and international (Europe/RoW) holiday respondents. The results were very consistent with 35% of domestic respondents planning their trip 3-6 months in advance compared to 39% of international respondents.

Table 6.5: Timing of trip planning – domestic vs international
Base = holiday respondents (529)

	Scotland UK/Ireland	Europe/ RoW
No of respondents	416	113
	%	%
Less than 2 weeks	9	11
2-4 weeks	11	10
1-2 months	22	21
3-6 months	35	39
6-12 months	19	18
1-2 years	2	1
More than 2 years	*	1

6.4 Timing of Trip Booking

As with trip planning, there was little consistency evident in the timing of trip bookings with two-fifths (40%) booking in the month before and almost a quarter (23%) booking less than 2 weeks in advance. Also of note, almost a tenth of respondents did not book in advance at all. In contrast less than a third (30%) book more than three months in advance.

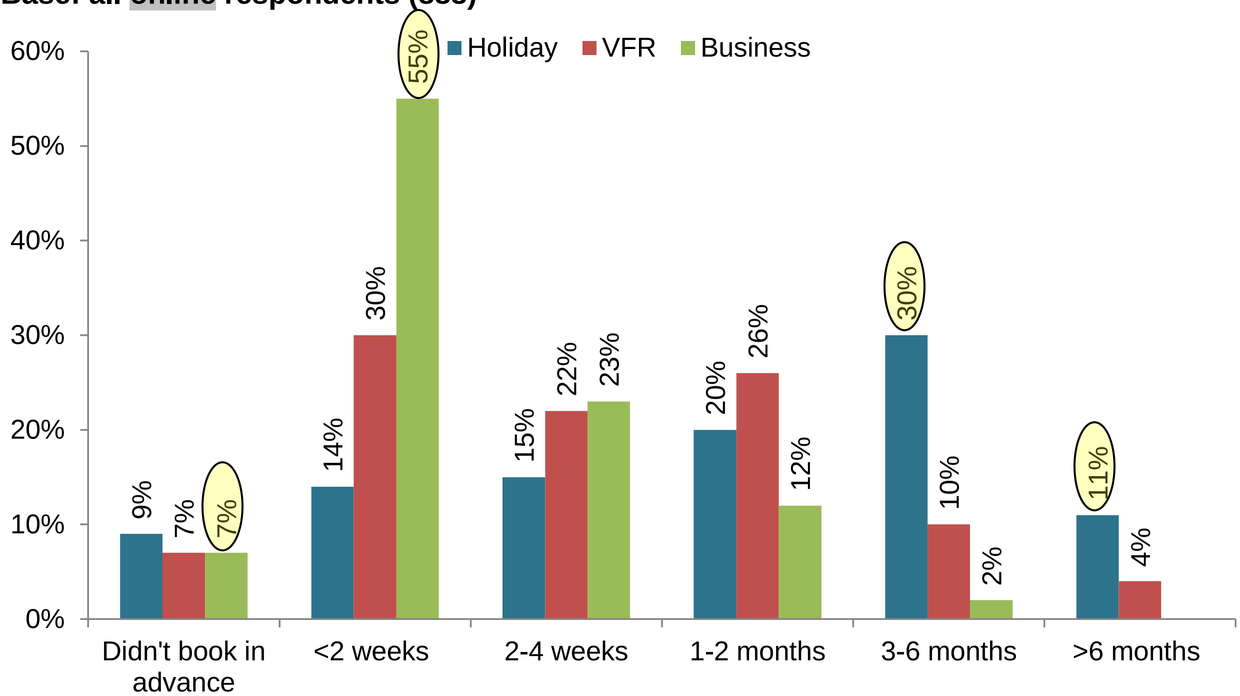
By accommodation type it is interesting to note that respondents booking 4 weeks or less before their visit were more likely to be staying in hotels (43%) or guest house/B&Bs (40%) compared to self-catering (19%). Those booking self-catering were much more likely to book at least three months in advance (61%) compared to those booking hotels (36%) or guest house/B&Bs (35%).

Table 6.6: Timing of trip booking
Base: all online respondents (888)

	%
Didn't book in advance	9
Less than 2 weeks	23
2-4 weeks	17
1-2 months	20
3-6 months	22
Over 6 months	8

Holiday respondents were the group most likely to book more than 3 months in advance whilst VFR respondents tended to book closer to their visit. In line with trip planning, business respondents acted very differently, with over 60% making their trip booking 4 weeks (or less) before travelling.

Chart 6.3: Timing of trip booking
Base: all online respondents (888)



6.4.1 Timing of trip booking – domestic vs international

The table below highlights the timing of trip booking for domestic (Scotland, UK/Ireland) and international (Europe/RoW) holiday respondents. The results were quite consistent though domestic respondents were slightly more likely to book within four weeks of their trip (30%) compared to international respondents (25%).

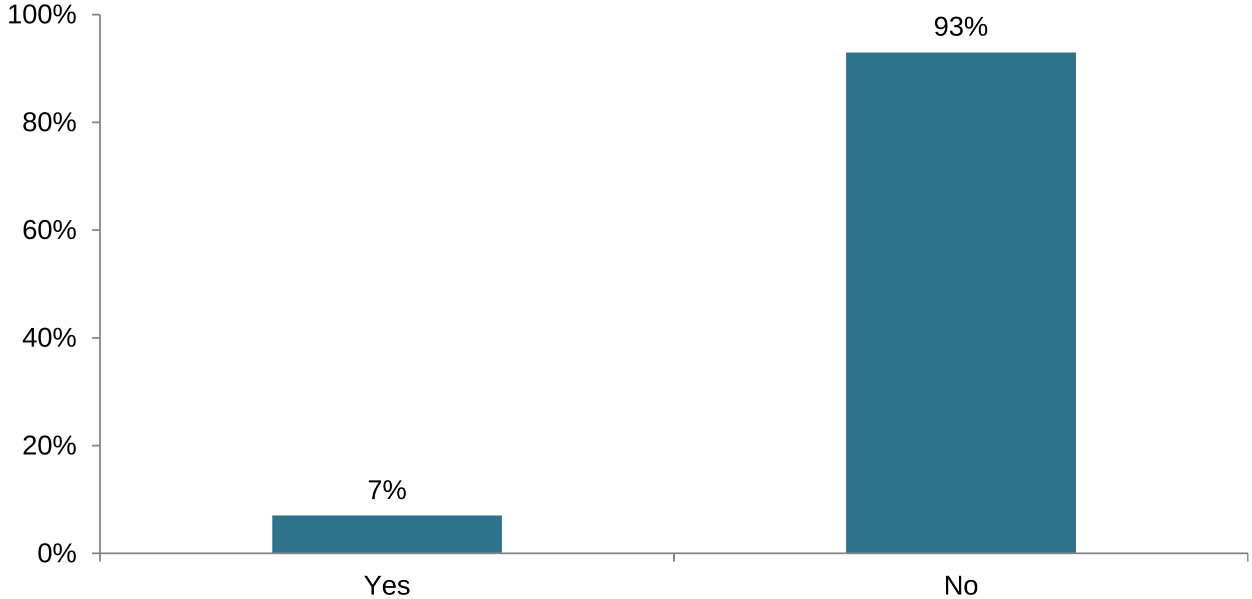
Table 6.7: Timing of trip booking – domestic vs international
Base = holiday respondents (529)

	Scotland UK/Ireland	Europe/ RoW
No of respondents	416	113
	%	%
Didn't book in advance	8	12
Less than 2 weeks	13	16
2-4 weeks	17	9
1-2 months	20	20
3-6 months	29	34
Over 6 months	12	9

6.5 Satisfaction with Travel Planning

The vast majority of respondents encountered no issues when booking their transport.

Chart 6.4: Issues when booking transport
Base: all face-to-face respondents (1,262)



For the small percentage of respondents who did have issues when booking travel to the Outer Hebrides the main issue for a third was that preferred ferry services were fully booked.

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

	%
My first choice of transport type was unavailable	-
No ferries at times/days I wanted	12
The ferries I wanted were too expensive	2
The ferries I wanted were fully booked	33
No ferries on preferred route	2
No flights at times/days I wanted	3
The flights I wanted were too expensive	1
The flights I wanted were fully booked	3
No flights on preferred route	2
Other	51

'Other' issues were mainly delays and cancellations often due to inclement weather:

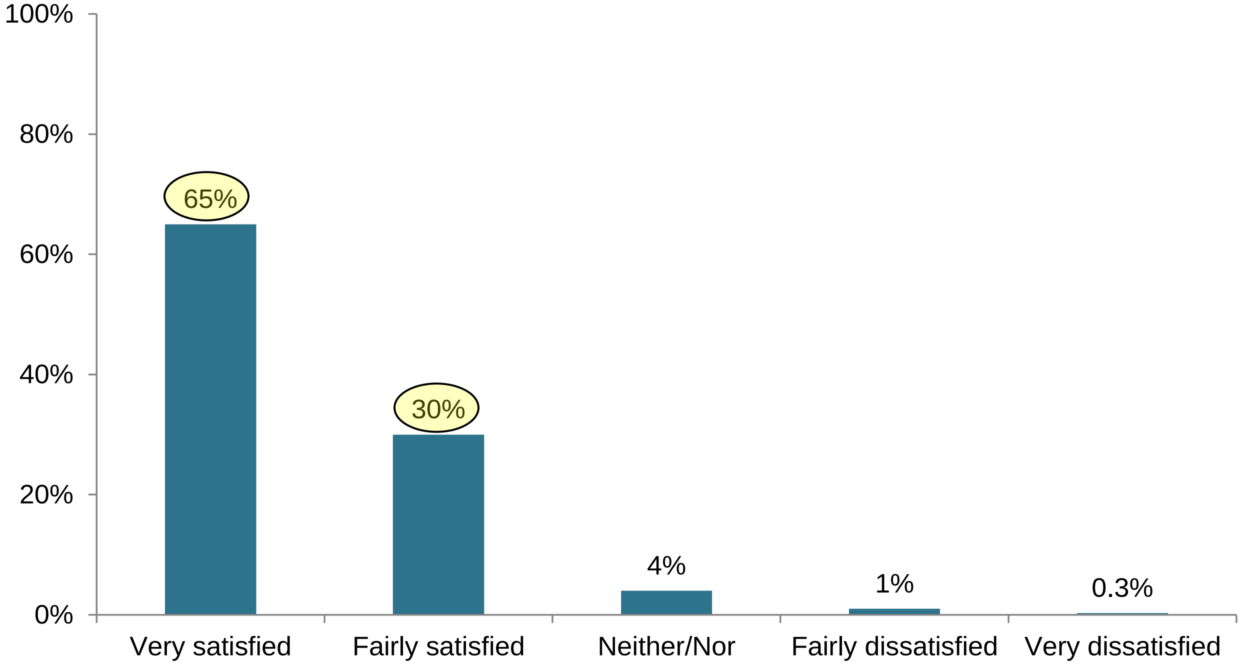
"Not taking bookings for Fri/Sat/Sun due to expected bad weather."

"Flight was cancelled and had to use car and ferry (from Stornoway to Benbecula)."

6.5.1 Getting to the Outer Hebrides

The majority of respondents were very or fairly satisfied (95%) with planning getting to the Outer Hebrides with just a very small proportion of respondents showing any dissatisfaction.

Chart 6.5: Satisfaction with getting to the Outer Hebrides
Base: online respondents who rated getting to the Outer Hebrides (738)



Holiday respondents demonstrated the highest levels of satisfaction with the planning of getting to the Outer Hebrides whilst VFR and business respondents showed some dissatisfaction, though still at very low levels.

Table 6.9: Satisfaction with getting to the Outer Hebrides - total and by type of visit
Base: online respondents who rated getting to the Outer Hebrides (738)

	Total %	Holiday %	VFR %	Business %
Very satisfied	65	71	51	50
Fairly satisfied	30	26	39	39
Neither/Nor	4	2	7	9
Fairly dissatisfied	1	*	2	3
Very dissatisfied	*	*	1	-
Mean score (out of 5)	4.58	4.67	4.38	4.36

Comments from visitors who were dissatisfied with getting to the Outer Hebrides highlighted concerns about the limited number of ferry departures and issues with the quality of the roads (particularly the A9).

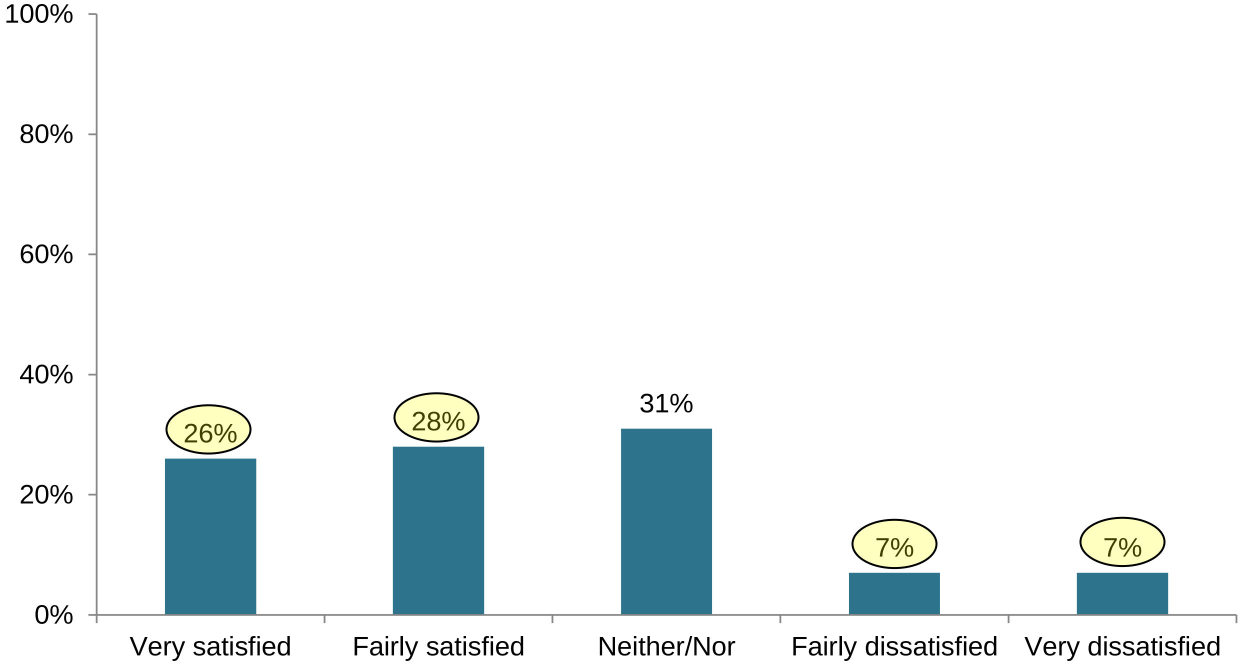
"There wasn't a ferry going over to Lewis on Friday tea-time."

"A9 road needs to be made safer. It is a very frustrating road to drive and as the main trunk road to Inverness is a disgrace."

6.5.2 Availability of convenient air routes

Just over half of respondents were very or fairly satisfied with the availability of convenient air routes when planning their travel to the Outer Hebrides and 14% of respondents stated they were dissatisfied with air route availability.

Chart 6.6: Satisfaction with availability of convenient air routes
Base: online respondents who rated availability of convenient air routes (245)



Nearly a quarter of VFR respondents were dissatisfied with the availability of convenient air routes. This is reflected in the lower mean score for this element of their trip.

Table 6.10: Satisfaction with availability of convenient air routes - total and by type of visit
Base: online respondents who rated availability of convenient air routes (245)

	Total %	Holiday %	VFR %	Business %
Very satisfied	26	23	22	37
Fairly satisfied	28	21	32	39
Neither/Nor	31	44	22	13
Fairly dissatisfied	7	5	11	9
Very dissatisfied	7	6	13	2
Mean score (out of 5)	3.58	3.50	3.40	4.00

The main reason for dissatisfaction with the availability of convenient air routes was the cost of flights, followed by the lack of choice of departure airports.

"Prices are far too high for flights."

"Prohibitively expensive for family travel."

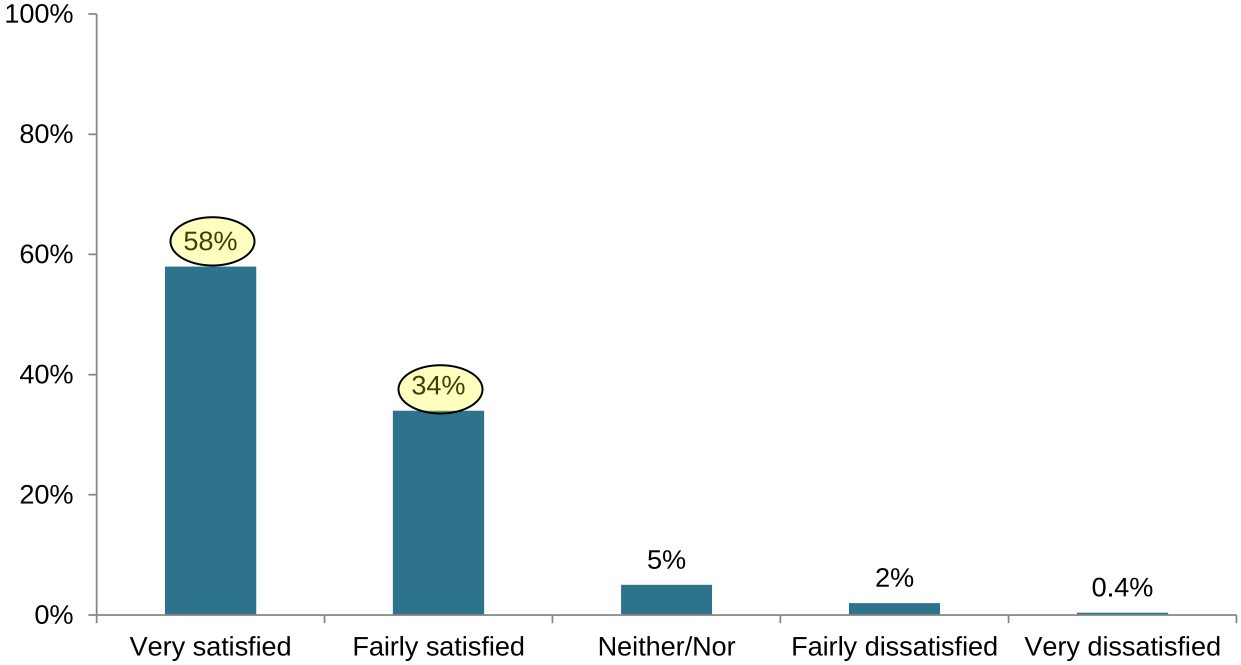
"Glasgow or Inverness are only departure locations."

"Flights only available from Scottish airports and do not appear to link adequately with flights from rest of UK."

6.5.3 Availability of convenient sea routes

Satisfaction with the availability of sea routes when planning trips to the Outer Hebrides was very high with 92% of respondents either very or fairly satisfied. Dissatisfaction levels were low.

Chart 6.7: Satisfaction with availability of convenient sea routes
Base: online respondents who rated availability of convenient sea routes (713)



Holiday respondents were most satisfied with the availability of convenient sea routes. VFR and business respondents were slightly less satisfied but still displayed low dissatisfaction levels.

Table 6.11: Satisfaction with availability of convenient sea routes - total and by type of visit
Base: online respondents who rated availability of convenient sea routes (713)

	Total %	Holiday %	VFR %	Business %
Very satisfied	58	63	49	42
Fairly satisfied	34	32	37	44
Neither/Nor	5	4	10	11
Fairly dissatisfied	2	1	4	3
Very dissatisfied	*	*	1	-
Mean score (out of 5)	4.48	4.55	4.28	4.24

The main reasons for dissatisfaction with the availability of sea routes were the limited timetables and the 'inconvenient' sailing times.

"It was difficult to plan the trip because of lack of specific sailings on particular days."

"It was not possible to complete a business day trip within the tight time frame of my schedule."

6.6 Planning the Visit – Island Comparisons

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

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

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

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

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

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

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

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

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

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

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

7. SOURCES OF INFORMATION

7.1 Sources of Information (pre-visit)

The internet/websites were the most common source of pre-visit information for respondents, with nearly two-thirds using this source. For around two-fifths of respondents, advice from friends/relatives/others was also important.

- Respondents on holiday (77%) were more likely than business (48%) and VFR (38%) respondents to refer to the internet/websites
- Similarly, holiday respondents were more likely than VFR and business respondents to use guidebooks, tourist board brochures/leaflets, and visitor information centres
- VFR respondents (64%) were much more likely than holiday (33%) and business (22%) respondents to speak to friends/relatives/others for advice

Table 7.1: Sources of information (pre-visit) - total and by type of visit
Base: all online respondents (888)

	Total %	Holiday %	VFR %	Business %
Internet/websites	64	77	38	48
Friends/relatives/advice from others	39	33	64	22
Guidebooks	29	43	5	6
Tourist Board brochures/leaflets	25	33	11	8
Travel operators (ferries, airlines)	15	18	6	12
Visitor Information Centre	12	17	3	2
Social media (Facebook/Twitter)	5	4	9	-
Other information source	5	5	4	7
Travel Agent	1	2	-	1
None of the above	13	5	23	29

Viewed by respondents' residence, the main difference in sources of information was that respondents from overseas (Europe, rest of world) were more likely than UK/Irish respondents and much more likely than Scottish respondents to use the internet/websites and guidebooks.

Table 7.2: Sources of information (pre-visit) – by respondent residence
Base: all online respondents (888)

	Scotland %	UK/Ire %	Europe %	RoW %
Internet/websites	56	70	80	83
Friends/relatives/advice from others	44	34	15	51
Guidebooks	17	37	60	45
Tourist Board brochures/leaflets	21	31	28	17
Travel operators (ferries, airlines)	14	17	9	21
Visitor Information Centre	9	15	16	15
Social media (Facebook/Twitter)	6	4	1	6
Other information source	5	6	5	6
Travel Agent	*	2	4	4
None of the above	20	7	2	-

7.2 Online Research

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

- In general, respondents on holiday were more likely to have conducted online research
- Accommodation was a key research topic for holiday (78%) and business (63%) respondents but not for VFR respondents, many of whom were staying with friends and relatives

Table 7.3: Online research topics - total and by type of visit
Base: online respondents who used the internet/websites (570)

	Total %	Holiday %	VFR %	Business %
Accommodation	70	78	35	63
Visitor centres/attractions	28	32	27	9
History/culture	28	32	13	16
Activities	27	32	17	7
Transport to destination	24	28	17	11
Natural history	23	27	10	11
Transport from destination	20	25	7	5
Festivals/Events	15	16	22	7
Genealogy/family history	4	3	8	-

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

Table 7.4: Online research topics – by respondent residence
Base: online respondents who used the internet/websites (570)

	Scotland %	UK/Ire %	Europe %	RoW %
Accommodation	67	66	83	86
Visitor centres/attractions	27	32	23	25
History/culture	23	29	31	43
Activities	27	26	23	36
Transport to destination	16	25	40	45
Natural history	15	31	32	23
Transport from destination	11	23	38	41
Festivals/Events	15	18	11	16
Genealogy/family history	3	3	2	16

7.3 Online Booking

In line with the most common topics respondents had researched online (see table 7.3), accommodation was the booking they were most likely to make via the internet.

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

Table 7.5: Online booking - total and by type of visit
Base: online respondents who used the internet/websites (570)

	Total %	Holiday %	VFR %	Business %
Accommodation	55	62	23	46
Transport to destination	22	24	15	21
Transport from destination	18	20	12	14
Activities	2	2	2	-
Festival/Event tickets	1	1	5	-
Visitor centres/visitor attractions	1	1	-	-
Other	7	6	5	9
None of the above	26	21	47	35

Viewed by respondents' residence the results show that respondents from the rest of the world (73%) and Europe (68%) were more likely than respondents from Scotland (47%) or the UK/Ireland (57%) to book accommodation online.

Table 7.6: Online booking - by respondent residence
Base: online respondents who used the internet/websites (570)

	Scotland %	UK/Ire %	Europe %	RoW %
Accommodation	47	57	68	73
Transport to destination	18	23	29	32
Transport from destination	14	20	28	27
Activities	2	2	-	-
Festival/Event tickets	2	2	-	-
Visitor centres/visitor attractions	*	1	5	2
Other	10	5	3	2
None of the above	28	25	26	23

7.4 Websites Used

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

Table 7.7: Websites used for research/booking
Base: online respondents who used the internet/websites (570)

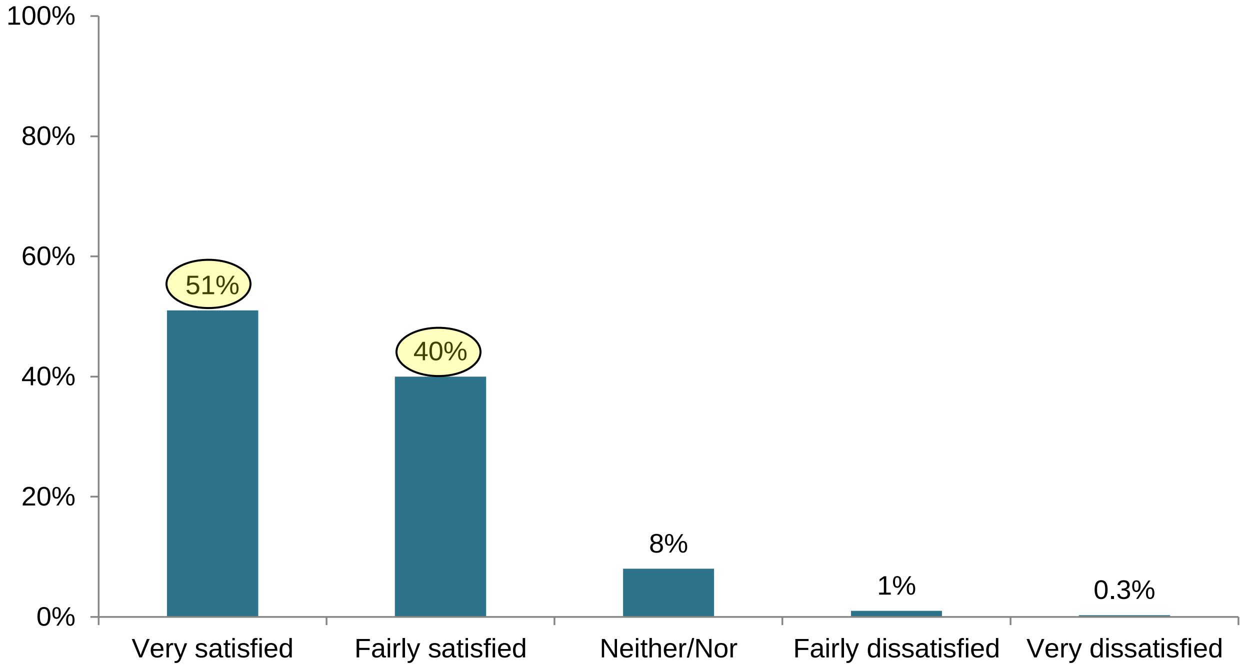
Website	%
Caledonian MacBrayne Hebridean & Clyde Ferries	29
VisitScotland	16
Google	13
tripadvisor	11
Booking.com	7

7.5 Satisfaction with Information Sources

7.5.1 Availability of information online

Overall, 91% of respondents were very or fairly satisfied with the availability of online information when planning their trip with just 1% displaying any dissatisfaction.

Chart 7.1: Satisfaction with availability of online information
Base: online respondents who rated availability of online information (699)



Around half of all respondent types were very satisfied with the availability of online information, and the high, consistent mean score reinforces the strong overall satisfaction ratings for this element of respondents' visit.

Table 7.8: Satisfaction with availability of online information - total and by type of visit
Base: online respondents who rated availability of online information (699)

	Total %	Holiday %	VFR %	Business %
Very satisfied	51	50	54	47
Fairly satisfied	40	41	36	47
Neither/Nor	8	8	8	4
Fairly dissatisfied	1	1	3	1
Very dissatisfied	*	*	-	-
Mean score (out of 5)	4.40	4.39	4.40	4.40

The comments from the small number respondents who were dissatisfied with online information highlighted issues with finding information during the planning phase of the trip and issues with specific information (e.g. one site for information on public transport).

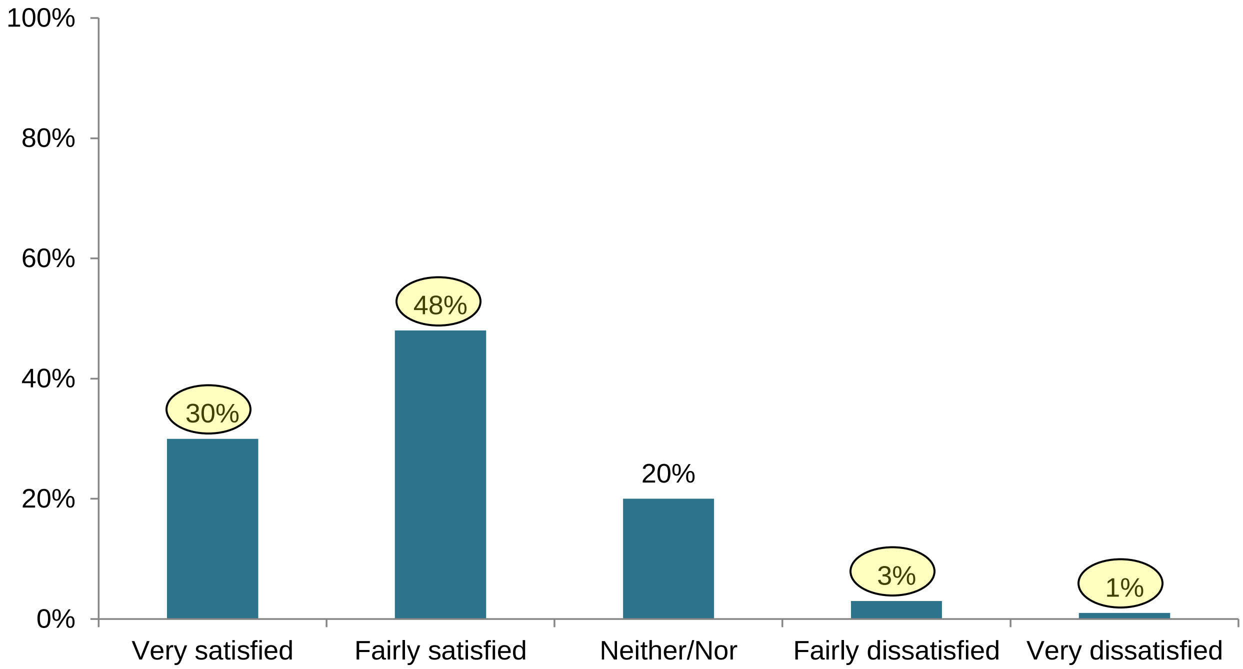
"It is very thin on the ground. From the available info we were worried about what we would do all week but there is plenty happening once you are there."

"Compared to recent trips to Orkney and Shetland, I found there was substantially less information online about activities and organised tours."

7.5.2 Availability of information offline

Overall, 78% of respondents were very or fairly satisfied with the availability of offline information when planning their trip with just 4% displaying any dissatisfaction.

Chart 7.2: Satisfaction with availability of offline information
Base: online respondents who rated availability of offline information (547)



VFR and business respondents displayed slightly higher levels of satisfaction than holiday respondents, though overall satisfaction was high for all visitor types.

Table 7.9: Satisfaction with availability of offline information - total and by type of visit
Base: online respondents who rated availability of offline information (547)

	Total %	Holiday %	VFR %	Business %
Very satisfied	30	29	36	27
Fairly satisfied	48	46	46	59
Neither/Nor	20	21	16	14
Fairly dissatisfied	3	3	2	-
Very dissatisfied	1	1	-	-
Mean score (out of 5)	4.03	3.99	4.16	4.13

The main reason for being dissatisfied with the availability of offline information was the lack of general information via brochures and guidebooks. Specific examples included lack of guidance for organising a visit via public transport, guides being out of date, and no travel books for the area in German.

"Not enough guides or booklets. Should be more comprehensive booklets at airport. See Jersey airport."

"Very little information on leaflets and things regarding activities or places to stay."

7.6 Sources of Information (during visit)

Respondents were asked how they had obtained information about places to visit and things to do during their visit to the Outer Hebrides. Table 7.10 shows that a wide variety of sources were used. Viewed by visitor type there are some notable differences

- In general, holiday respondents were most likely to seek out sources of information during their visit, with only 7% sourcing no information during their visit, compared to 25% of VFR and 31% of business respondents
- The results in the table below show that holiday respondents were much more likely than VFR or business respondents to source information from visitor information centres, brochures, local heritage information, proprietors, guidebooks and visitor information points
- Holiday respondents most likely source of information was from a visitor information centre (42%) closely followed by asking locals (40%). VFR and business respondents were most likely to ask locals (37% and 34%) and use smartphones/mobile internet (32% and 31%)

Table 7.10: Sources of information (during visit) – total and by type of visit
Base: all online respondents (888)

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

7.7 Sources of Information – Island Comparisons

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

Pre-visit

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

Table 7.11: Sources of information - pre and during visit
Base: all online respondents

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

During visit

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

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

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

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

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

Table 7.13: Online research and bookings
Base: online respondents who used the internet/websites

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

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

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

Table 7.14: Satisfaction with information sources
Base: online respondents who rated information sources

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

8. COMMUNICATION

8.1 Use of Social Media

During or after their visit, 41% of respondents had communicated about their visit using social media, with photo uploads and Facebook updates the most common forms of social media used.

- VFR respondents were more likely than holiday and business respondents to use social media with over a third communicating about their visit with trip photos and on Facebook.
- There was a clear pattern by respondent age with uploading trip photos and updating Facebook much more common for those aged 16-24 (61% and 50% respectively) than for those aged 65+ (12% and 8%).

Table 8.1: Use of social media – total and by type of visit
Base: all online respondents (888)

	Total %	Holiday %	VFR %	Business %
Uploaded trip photos to the Internet	31	33	34	20
Updated Facebook status about trip	27	25	37	28
Tweeted about your trip	4	4	4	5
Blogged about your trip	2	2	1	1
None of these	59	60	53	62

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

Table 8.2: Use of social media – by respondent residence
Base: all online respondents (888)

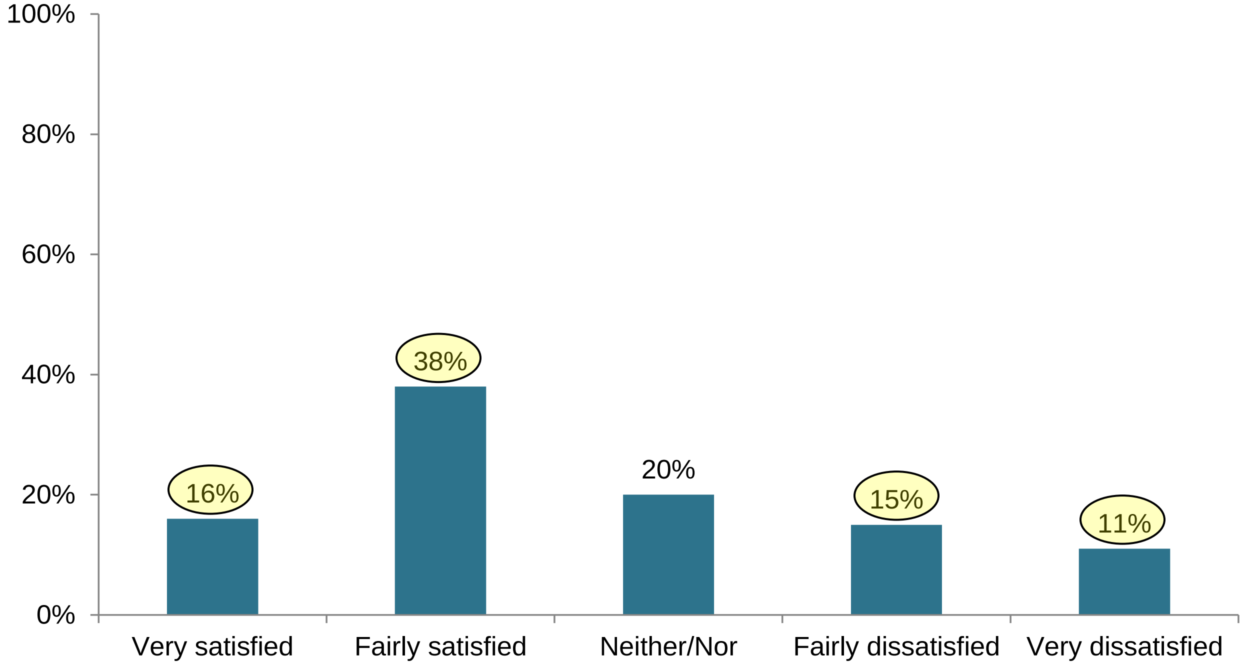
	Scotland %	UK/Ire %	Europe %	RoW %
Uploaded trip photos to the Internet	29	31	26	58
Updated Facebook status about trip	29	25	19	38
Tweeted about your trip	4	5	1	2
Blogged about your trip	1	3	-	2
None of these	60	60	70	36

8.2 Satisfaction with Communications

8.2.1 Availability of mobile phone reception

Overall satisfaction with the availability of mobile phone reception was quite low with 54% of respondents very or fairly satisfied, but 26% dissatisfied.

Chart 8.1: Satisfaction with availability of mobile phone reception
Base: online respondents who rated availability of mobile phone reception (824)



Satisfaction with mobile phone reception was quite consistent across different visitor types and all showed some significant dissatisfaction with around a quarter of all respondents fairly or very dissatisfied.

Table 8.3: Satisfaction with availability of mobile phone reception - total and by type of visit
Base: online responses who rated availability of mobile phone reception (824)

	Total %	Holiday %	VFR %	Business %
Very satisfied	16	15	17	19
Fairly satisfied	38	39	43	31
Neither/Nor	20	21	11	23
Fairly dissatisfied	15	14	16	18
Very dissatisfied	11	11	13	9
Mean score (out of 5)	3.32	3.33	3.34	3.32

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

“As I was traveling for business it can be problematic when I have limited phone reception.”

“Not consistently available. People were trying to contact me and could not by phone.”
"There was no reception where I stayed."

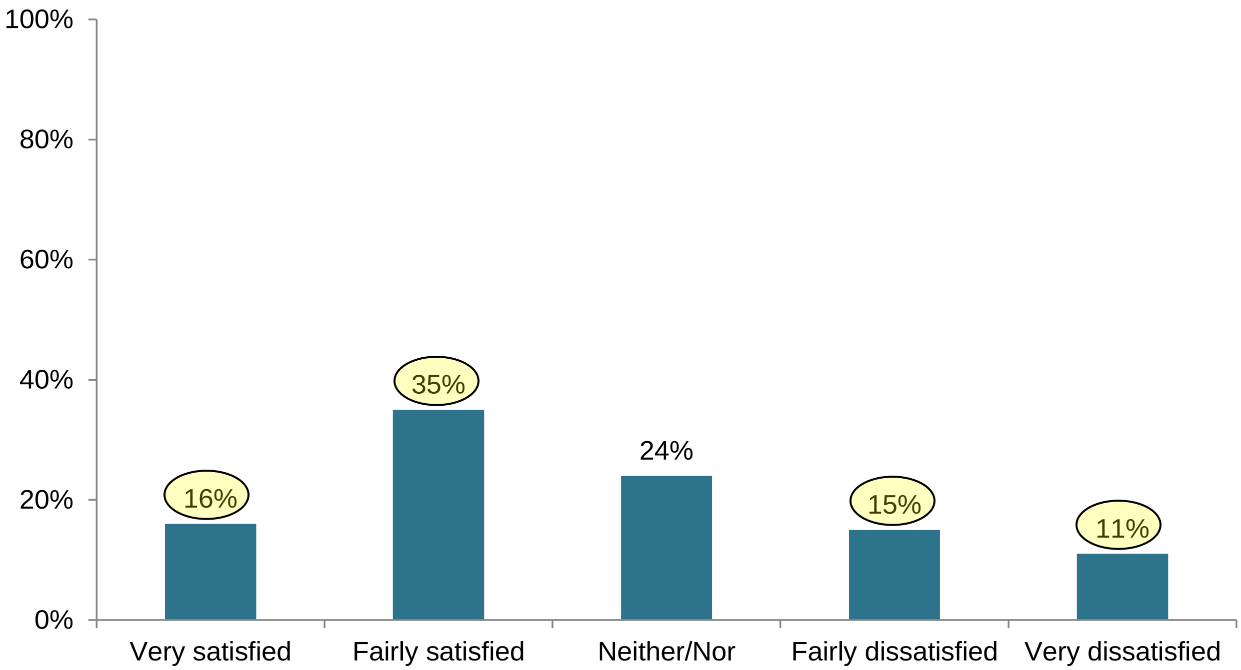
There were also comments about the poor access to mobile internet services via 3G.

"The Uists really need 3G to encourage travellers."

8.2.2 Availability of WiFi/broadband access

As with mobile phone reception, satisfaction with the availability of WiFi/broadband was mixed, though just over half of respondents were satisfied (51%), just over a quarter were dissatisfied (26%).

Chart 8.2: Satisfaction with availability of WiFi/broadband access
Base: online respondents who rated availability of WiFi/broadband access (689)



Over a quarter of holiday and VFR respondents were dissatisfied with the availability of WiFi/broadband during their visit compared with over a fifth of business visitors.

Table 8.4: Satisfaction with availability of WiFi/broadband access - total and by type of visit
Base: online respondents who rated availability of WiFi/broadband access (689)

	Total %	Holiday %	VFR %	Business %
Very satisfied	16	16	15	13
Fairly satisfied	35	34	37	38
Neither/Nor	24	24	20	29
Fairly dissatisfied	15	16	13	13
Very dissatisfied	11	10	15	9
Mean score (out of 5)	3.30	3.30	3.22	3.33

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

"It wasn't available on South Harris, we had to use cabled internet and it was extremely slow."

“Internet - did not find 3G signal out with the town centre.”

"Not all venues have WiFi. I was working in the evenings and wanted to go out and do electronic based work while experiencing local venues. I had to look for good quality WiFi access."

8.3 Communication – Island Comparisons

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

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

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

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

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

- Satisfaction levels with the availability of mobile phone reception and WiFi/broadband were slightly higher among holiday visitors on Orkney and Shetland
- In the Outer Hebrides, holiday, VFR and business respondents displayed similar levels of satisfaction with communications

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

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

9. TRANSPORT

9.1 Arriving and Departing

Ferries were a much more common form of transport for respondents arriving and departing the Outer Hebrides, with around four-fifths using this form of transport. Ullapool was the most likely ferry destination for respondents. It should be noted that these results highlight the transport options chosen by survey respondents and are not meant to provide representative results on overall transport methods.

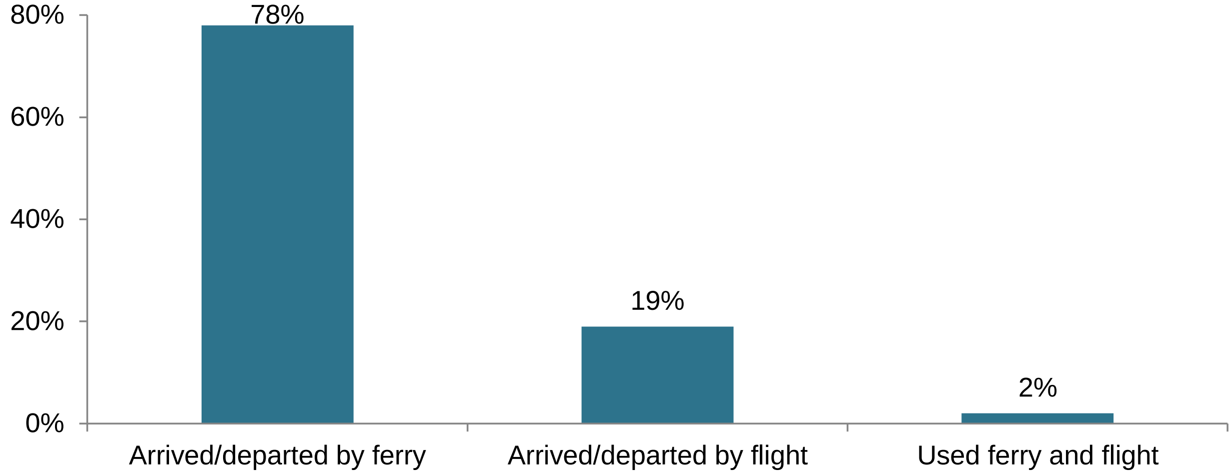
Table 9.1: Arrival and departure points
Base: all face-to-face respondents (1,262)

	Arrived from %	Departed to %
Ferry	81	80
- Ullapool - ferry	*32*	*40*
- Uig (to Tarbert) – ferry	*27*	*23*
- Uig (to Lochmaddy – ferry	*9*	*8*
- Oban (to Lochboisdale) – ferry	*6*	*8*
- Oban (to Castlebay) – ferry	*7*	*1*
Flight	20	21
- Glasgow - flight	*11*	*12*
- Inverness - flight	*5*	*5*
- Edinburgh - flight	*4*	*4*
- Aberdeen - flight	-	-

Chart 9.1 shows the percentage of respondents who arrived and departed the Outer Hebrides using the same form of transport. This confirms the high usage of ferries over flights.

- Respondents on holiday were more likely to be arriving/departing by ferry (93%) than VFR (78%) or business (49%) respondents
- Business (48%) respondents were most likely to be arriving/departing on a flight

Chart 9.1: Arrival and departure methods
Base: all face-to-face respondents (1,262)



Transport methods to/from the Outer Hebrides varied over the research period with the most notable trend being a decrease in ferry usage between January-March and an increase between July-September.

Table 9.2: Arrival and departure methods – by quarter
Base: all face-to-face respondents (1,262)

	Q1 % Oct-Dec	Q2 % Jan-Mar	Q3 % Apr-Jun	Q4 % Jul-Sep
Arrived/departed by ferry	76	63	76	86
Arrived/departed by flight	21	34	22	13
Used ferry and flight	3	2	2	2

9.2 Satisfaction with Departure Points

Respondent satisfaction with the facilities and services at various departure points was consistently high with no significant levels of dissatisfaction.

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

	Stornoway ferry	Tarbert ferry	Stornoway airport	Southern Isles ferry (Lochmaddy, Lochboisdale, Castlebay)	Southern Isles airport (Benbecula, Barra)
Number of respondents	500	289	209	212	52
	%	%	%	%	%
Very satisfied	78	72	75	75	67
Fairly satisfied	15	22	20	19	31
Neither/Nor	5	5	3	4	-
Fairly dissatisfied	1	-	1	2	2
Very dissatisfied	*	-	1	-	-

There were very few comments specifying reasons for dissatisfaction with departure points and several comments were very specific (e.g. no plugs in Benbecula, issues with credit card in Lochmaddy). The only departure point to receive general comments on reasons for dissatisfaction was Stornoway ferry: these comments highlighted the lack of food and drink facilities and poor customer care outside the ferry.

Respondents to the online survey were also asked about their likelihood of recommending departure points. Table 9.4 shows that, in general, the vast majority of respondents would recommend the main airport and ferry terminals.

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

	Stornoway ferry	Tarbert ferry	Stornoway airport	Southern Isles ferry (Lochmaddy, Lochboisdale, Castlebay)	Southern Isles airport (Benbecula, Barra)
Number of respondents	343	311	74	137	22
	%	%	%	%	%
Yes	99	99	93	98	95
No	1	1	7	2	5

The reasons for not recommending departure points related to specific issues and experiences of respondents, including issues such as the poor dog seating area in the Stornoway ferry and poor phone reception at the Lochmaddy terminal and Stornoway airport. The only area to receive multiple comments was the security at Stornoway airport which respondents described as 'officious' and 'intrusive'.

9.3 Transport during Visit

Car, whether own/friends/firms or hired, was the main form of transport for over two-thirds of all respondents. VFR respondents (83%) were more likely to be using a car (own/friends/firms) than respondents on holiday (68%) or business (51%).

Over three-fifths of respondents had no secondary form of transport whilst on their visit, however, where stated, walking (18%) and ferry/public boats (16%) were the most common ‘other’ forms of transport used.

- Holiday respondents (23%) were more likely to have spent time walking during their visit than VFR (17%) or business (10%) respondents
- Similarly, holiday respondents (23%) were more likely to have used a ferry/public boat than VFR (8%) or business (7%) respondents

Table 9.5: Transport during visit
Base: all face-to-face respondents (1,262)

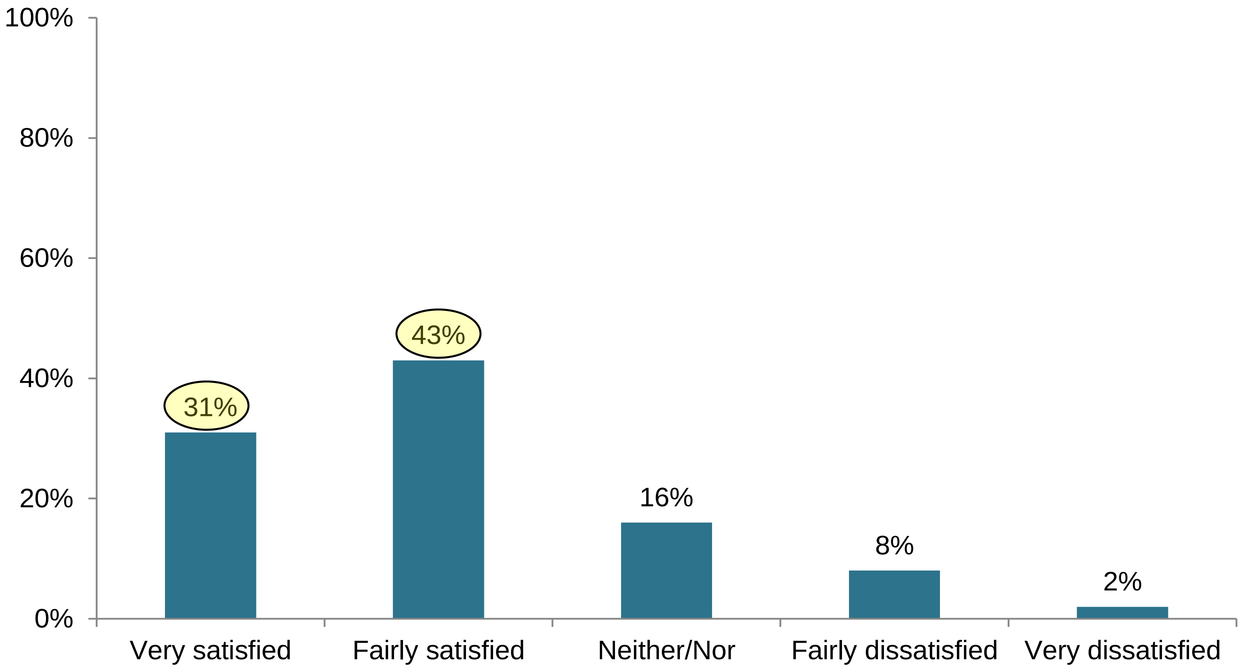
	Main form of transport %	Other forms of transport %
Car – own/friends/firms	67	2
Car – hired	13	*
Taxi	4	2
Motorhome	4	*
Walked	3	18
Bicycle	2	3
Regular bus/coach	2	2
Organised coach tour	1	*
Motorbike	1	*
Ferry/public boat	*	16
Private boat (owned/hired)	*	2
Plane	*	1
Hitch-hiked	*	1
None	*	62

9.4 Satisfaction with Transport

9.4.1 Cost of travel to the Outer Hebrides

Just under three-quarters of respondents were very or fairly satisfied with the cost of travel to the Outer Hebrides whilst a tenth were dissatisfied (fairly or very).

Chart 9.2: Satisfaction with the cost of travel to the Outer Hebrides
Base: online respondents who rated cost of travel to the Outer Hebrides (735)



Viewed by type of visit it is clear that VFR and business respondents were less satisfied than holiday respondents with the cost of travel to the Outer Hebrides. These two respondent types, especially business, were more likely to be travelling by air and this increases the likelihood of being dissatisfied.

Table 9.6: Satisfaction with the cost of travel to the Outer Hebrides – total/type of visit
Base: online responses who rated cost of travel to the Outer Hebrides (735)

	Total %	Holiday %	VFR %	Business %
Very satisfied	31	34	26	22
Fairly satisfied	43	44	38	39
Neither/Nor	16	16	13	21
Fairly dissatisfied	8	5	17	14
Very dissatisfied	2	1	6	4
Mean score (out of 5)	3.93	4.06	3.60	3.61

The main reason given for being dissatisfied with the cost of travel to the Outer Hebrides was the price of flights.

“Flights are too expensive, but they are the most convenient form of travel."

“Very expensive! Over £1,000 for 5 people to fly from London to Stornoway!”

"I felt that £150 on a budget airline for a 25 minute flight was excessive, especially as I have used the same airline to fly to Sweden for less money."

Several respondents commented on the expense of travelling by ferry, but others felt that ferry prices were 'reasonable'.

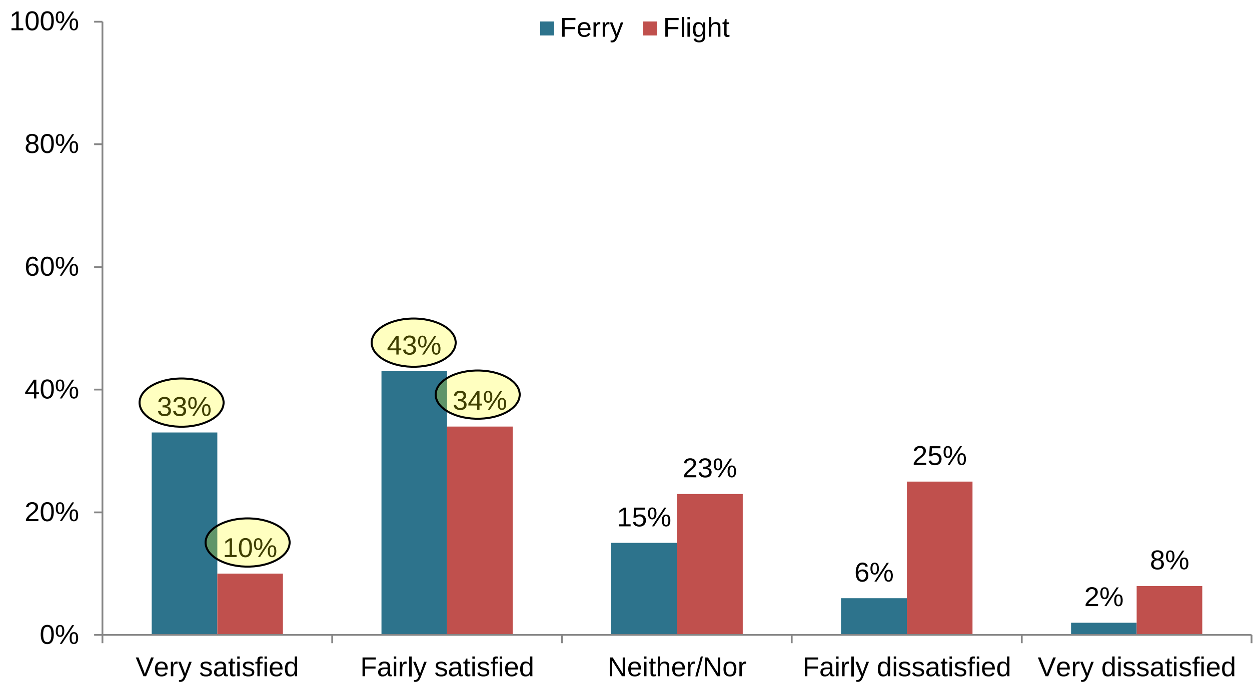
"The cost of the ferry is a lot more than if we were going to France or another part of Europe by ferry."

"Travel costs associated with Calmac ferries were reasonable, but the cost of flying from Edinburgh to Stornoway has become prohibitive."

9.4.2 Cost of travel to the Outer Hebrides – ferry vs flight

A comparison of ferry and flight highlights that ferry passengers displayed higher levels of satisfaction than flight passengers with the cost of getting to the Outer Hebrides, with over three-quarters of ferry passengers very or quite satisfied compared to under half of flight passengers (44%). The results are further emphasised by an overall mean score of 4.00 (out of 5) for ferry passengers satisfaction compared with 3.13 for flight passengers.

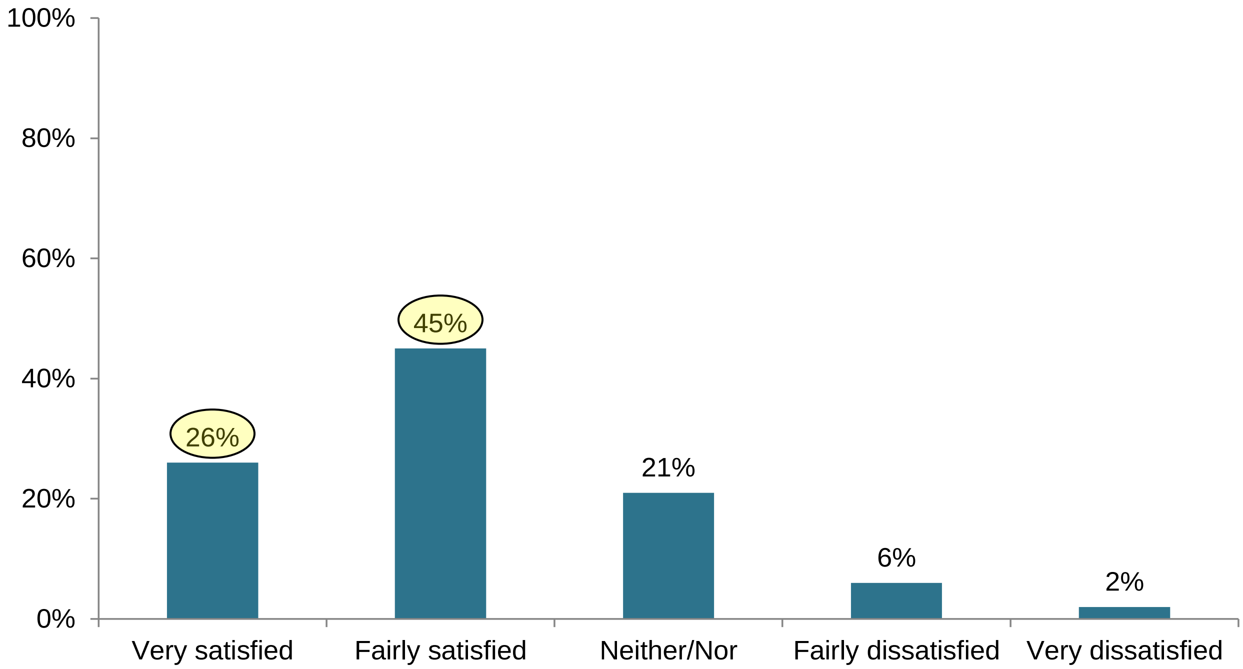
Chart 9.3: Satisfaction with the cost of travel to the Outer Hebrides – ferry vs flight
Base: online respondents who rated cost of travel to the Outer Hebrides (735)



9.4.3 Cost of travel in The Outer Hebrides

Just over seven-tenths of respondents were very or fairly satisfied with the cost of travel in the Outer Hebrides, with just over a quarter very satisfied. Almost a tenth of respondents displayed some dissatisfaction.

Chart 9.4: Satisfaction with cost of travel in the Outer Hebrides
Base: online respondents who rated cost of travel in the Outer Hebrides (783)



Over three-quarters of holiday respondents were very or fairly satisfied with the cost of travel in The Outer Hebrides, but VFR and business respondents displayed lower levels of satisfaction, with over a tenth of respondents dissatisfied.

Table 9.7: Satisfaction with cost of travel in the Outer Hebrides - total and by type of visit
Base: online respondents who rated cost of travel in the Outer Hebrides (783)

	Total %	Holiday %	VFR %	Business %
Very satisfied	26	29	23	19
Fairly satisfied	45	47	44	36
Neither/Nor	21	19	18	31
Fairly dissatisfied	6	4	9	11
Very dissatisfied	2	1	5	3
Mean score (out of 5)	3.87	3.98	3.70	3.57

The main reason for dissatisfaction with the cost of travel in the Outer Hebrides related to the costs of using a car, particularly the high cost of fuel

“Fuel is very expensive compared to the mainland.”
Petrol is even more expensive than on the (rural) mainland."

The other main reason was the costs of inter-island ferries for passengers and cars

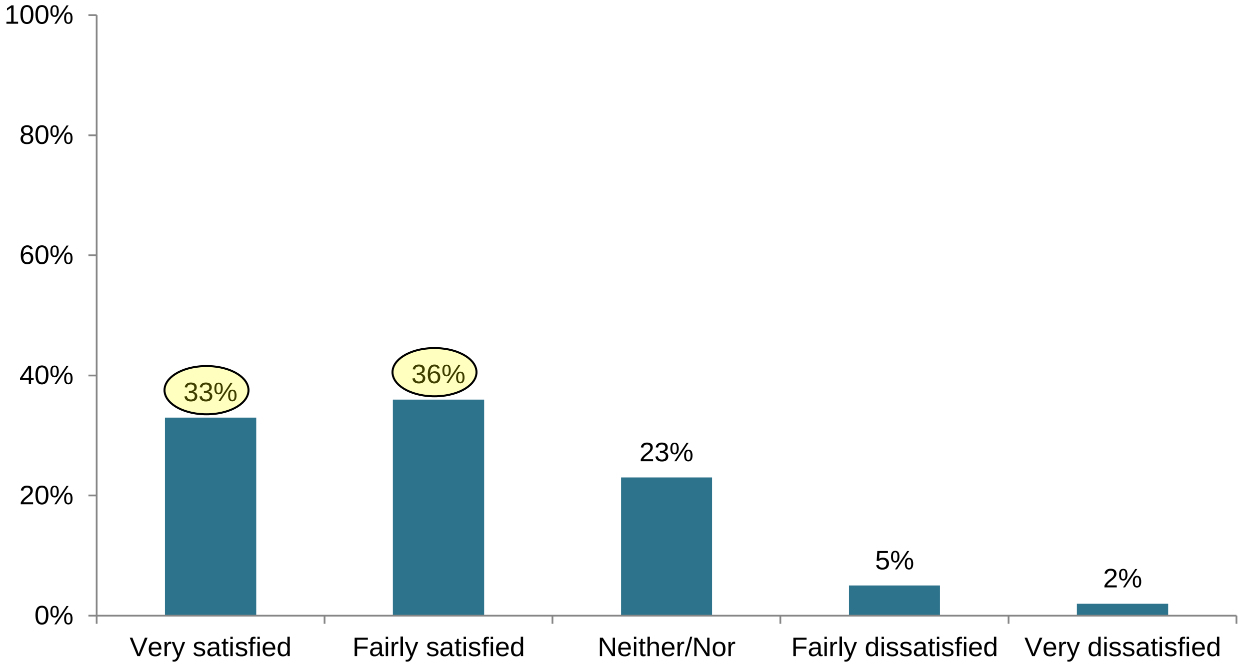
“Ferry prices between Eriskay and Barra were very expensive for a car."

"Individual ferries are very expensive."

9.4.4 Availability of public transport

Over two-thirds of respondents were very or fairly satisfied with the availability of public transport.

Chart 9.5: Satisfaction with availability of public transport
Base: online respondents who rated availability of public transport (341)



Satisfaction levels were broadly consistent across visitor types although dissatisfaction was most evident among holiday respondents.

Table 9.8: Satisfaction with availability of public transport - total and by type of visit
Base: online respondents who rated availability of public transport (341)

	Total %	Holiday %	VFR %	Business %
Very satisfied	33	33	27	25
Fairly satisfied	36	36	37	44
Neither/Nor	23	20	33	28
Fairly dissatisfied	5	8	2	-
Very dissatisfied	2	3	2	3
Mean score (out of 5)	3.93	3.89	3.84	3.89

The main reasons for dissatisfaction with the availability of public transport was the bus service, including the infrequency of scheduled buses and lack of information available on the service.

"The bus services are very limited, to most of the islands."

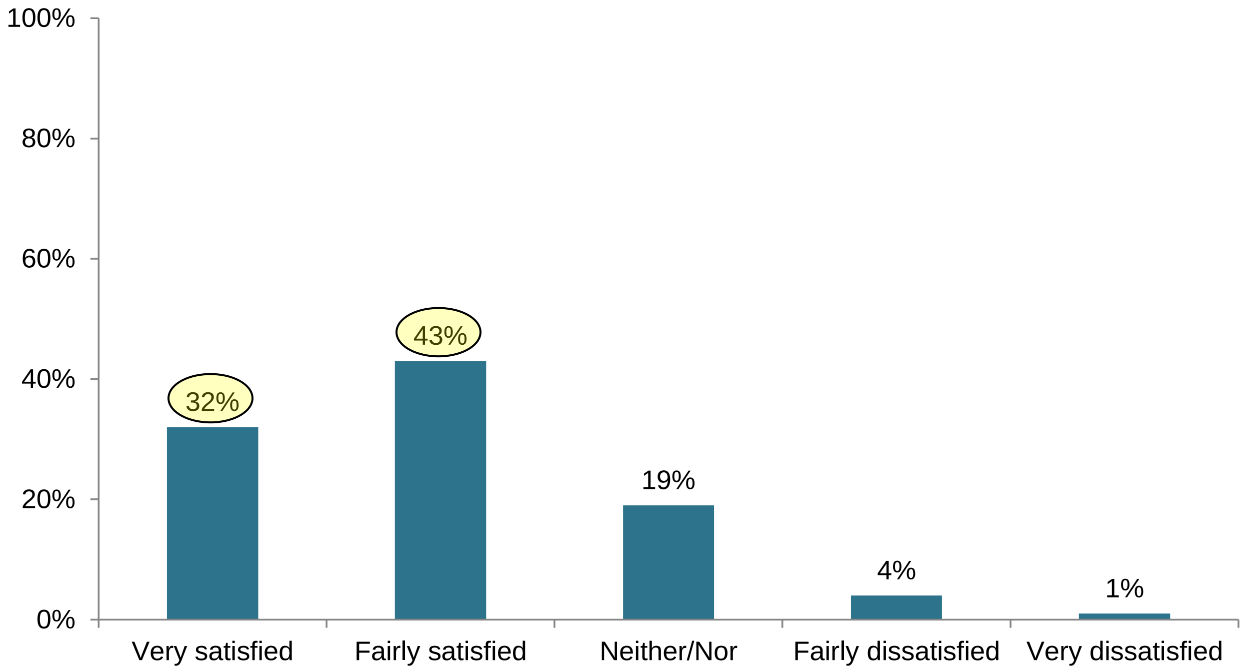
"Not a great selection of buses from Ness to Stornoway of an evening. To go to Stornoway for dinner was not really an option."

"Outwith the bus station no information is provided. Locals are still helpful stopping to offer lifts but the bus services could be greatly improved."

9.4.5 Value for money of public transport

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

Chart 9.6: Satisfaction with value for money of public transport
Base: online respondents who rated value for money of public transport (471)



VFR and business respondents showed lower levels of satisfaction than holiday respondents with the value for money of public transport, with considerable proportions (25% and 38%) giving a neutral response (possibly indicating lower use of public transport).

Table 9.9: Satisfaction with value for money of public transport - total and by type of visit
Base: online respondents who rated value for money of public transport (471)

	Total %	Holiday %	VFR %	Business %
Very satisfied	32	36	29	19
Fairly satisfied	43	44	43	37
Neither/Nor	19	14	25	38
Fairly dissatisfied	4	5	2	4
Very dissatisfied	1	1	1	2
Mean score (out of 5)	4.02	4.10	3.95	3.67

The cost of inter-island ferries was the main reason for dissatisfaction with value for money of public transport.

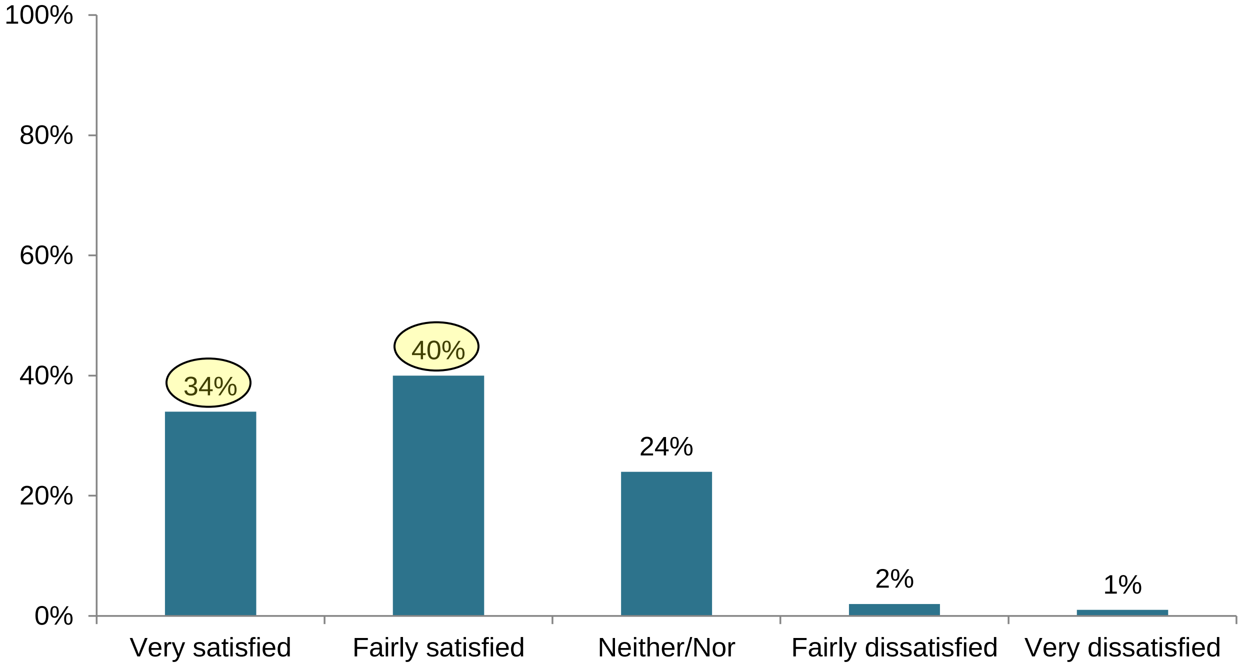
“The ferry to Barra is very expensive for a day trip.”

“We felt the cost of the ferries between islands was high (We went to Harris, then the Uists).”

9.4.6 Quality of public transport

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

Chart 9.7: Satisfaction with quality of public transport
Base: online respondents who rated quality of public transport (376)



Business respondents were least satisfied with the quality of public transport, though there was no dissatisfaction, just less positive ratings of satisfaction and a marked degree of neutrality behind these ratings.

Table 9.10: Satisfaction with quality of public transport - total and by type of visit
Base: online respondents who rated quality of public transport (376)

	Total %	**Holiday %**	**VFR %**	**Business %**
Very satisfied	34	40	30	19
Fairly satisfied	40	39	40	42
Neither/Nor	24	20	24	40
Fairly dissatisfied	2	1	4	-
Very dissatisfied	1	-	3	-
Mean score (out of 5)	4.05	4.18	3.91	3.79

There were very few comments from respondents who were dissatisfied with the quality of public transport, but those that did comment focussed on the bus service.

“The buses are HELLISH! Last bus to Harris at 5.30? How can people enjoy social evening time in Stornoway?”

"Unable to transport more than 2 bikes. Why not use a trailer in the season?"

9.5 Transport – Island Comparisons

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

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

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

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

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

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

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

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

10. ACCOMMODATION

10.1 Accommodation during Visit

Respondents were asked to identify the type/s of accommodation they stayed in during their visit. Almost three-tenths of respondents stayed in hotel accommodation with 3 star hotels accounting for over half of these stays. Other common forms of accommodation were: guest house/B&B, self-catering and staying with friends/family, which combined, accounted for 59% of respondents.

- Business respondents (54%) were more likely than those on holiday (24%) to use hotel accommodation. A very small percentage of VFR respondents (6%) used hotels
- VFR respondents were much more likely to be staying with friends/relatives (66%) compared to holiday (6%) and business (3%) respondents
- Guest house/B&Bs were popular with holiday and business respondents, though self-catering was more popular with holiday respondents compared to VFR and business

In terms of residence, hotel usage was quite even, varying from 23% of respondents from the UK/Ireland to 35% of respondents from the rest of the world. (Scottish: 29%, Europe: 28%). Respondents from Europe (35%) and the rest of the world (51%) were most likely to use guest houses/B&Bs whilst Scottish (18%) and UK/Ireland (24%) respondents were most likely to staying in self-catering accommodation.

Table 10.1: Accommodation during visit
Base: face-to-face respondents staying overnight (1,172)

	Total %	Holiday %	VFR %	Business %
Hotel (all)	27	24	6	54
- Hotel (5 star/luxury)	*	*1*	-	-
- Hotel (4 star)	*6*	*7*	*1*	*9*
- Hotel (3 star)	*15*	*13*	*4*	*29*
- Hotel (1-2 star)	*6*	*3*	*2*	*16*
Guest house/B&B	24	28	7	27
Self-catering	18	24	14	7
Staying with friends/family	17	6	66	3
Tent at serviced campsite	5	8	1	-
Second home	4	5	5	2
Hostel	3	5	-	1
Tent (non-campsite)	3	4	*	-
Motorhome at serviced campsite	3	4	2	-
Motorhome (non-campsite)	3	4	3	-
Workers' accommodation on-site/rig	1	-	-	2
Caravan pitch - serviced campsite	1	1	-	-
Static caravan	1	1	-	-
Inn	1	1	-	1
Restaurant with rooms	*	*	-	*
Other	4	3	2	6

The proportion of respondents staying in hotels peaked between October-March whilst guest house/B&B and self-catering options accounted for a larger proportion of respondents between April-September. This reflects the dip in business respondents during this period (refer back to table 5.2).

Table 10.2: Accommodation during visit - by quarter
Base: face-to-face respondents staying overnight (1,172)

	Q1 % Oct-Dec	Q2 % Jan-Mar	Q3 % Apr-Jun	Q4 % Jul-Sep
Hotel (all)	32	34	24	26
Guest house/B&B	11	21	26	26
Self-catering	13	8	22	19
Staying with friends/family	27	20	16	15

10.2 Booking Accommodation
Respondents used a variety of methods to book their accommodation.

- Nearly two-fifths of business respondents had someone book accommodation on their behalf (37%)
- Seven-tenths of VFR respondents did not need to book, reflecting the high proportion staying with friends/family
- Holiday respondents were most likely to book by provider website, and provider telephone was also quite common amongst these respondents

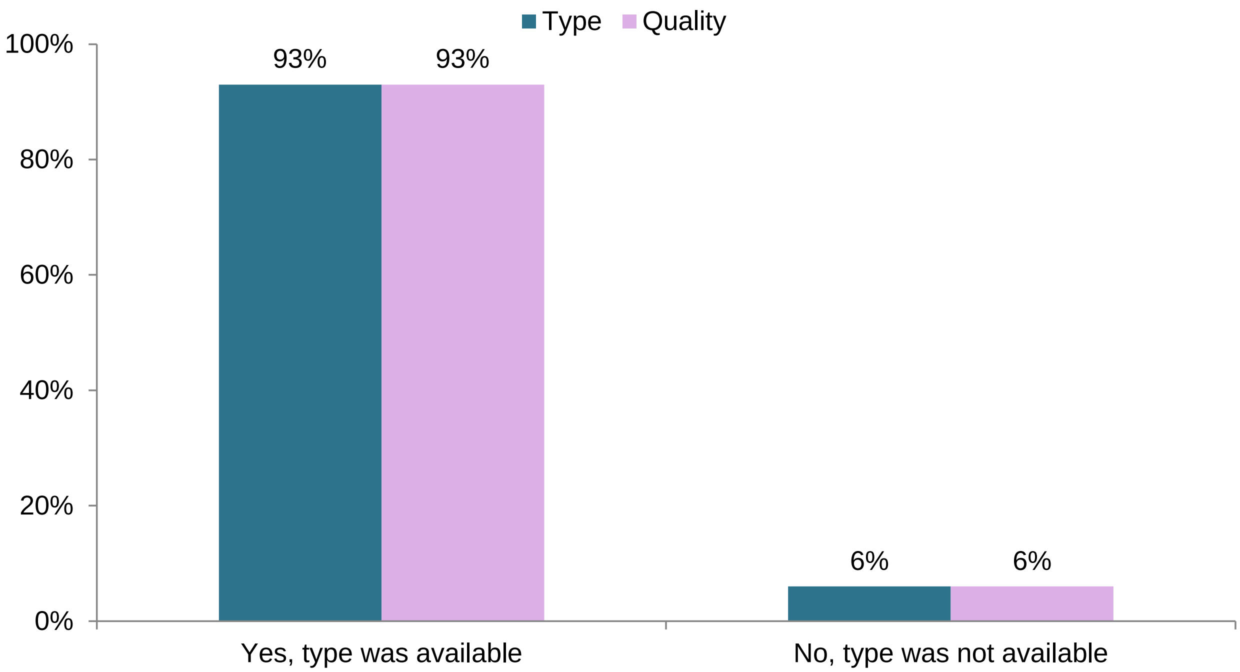
Table 10.3: Accommodation booking methods
Base: all face-to-face respondents (1,262)

	Total %	Holiday %	VFR %	Business %
Did not need to book	23	16	70	5
Providers' website	20	29	10	8
Provider by telephone	18	21	8	18
Someone booked on my behalf	13	6	2	37
Provider by email	8	13	3	2
Did not book in advance	7	12	3	1
Internet Travel Agent e.g. Expedia	3	3	1	4
visitscotland.com	2	3	*	1
VIC\tourist board office	2	2	1	1
Tour/travel company website	1	2	*	*
High Street Travel Agent	1	1	-	1
Other	5	6	1	5

10.3 Type and Quality of Accommodation

The vast majority of respondents who stayed overnight in ‘paid for’ accommodation felt both the type and quality of accommodation they wanted were available.

Chart 10.1: Availability of type/quality accommodation
Base: face-to-face respondents staying overnight in paid accommodation (771)



All respondents were likely to agree with the statements about the type and quality of accommodation available, suggesting the current accommodation offering appeals to a variety of visitors.

Table 10.4: Availability of type/quality accommodation
Base: face-to-face respondents staying overnight in paid accommodation (771)

	Total %	Holiday %	VFR %	Business %
Yes, type was available	93	93	91	94
Yes, quality was available	93	94	95	91

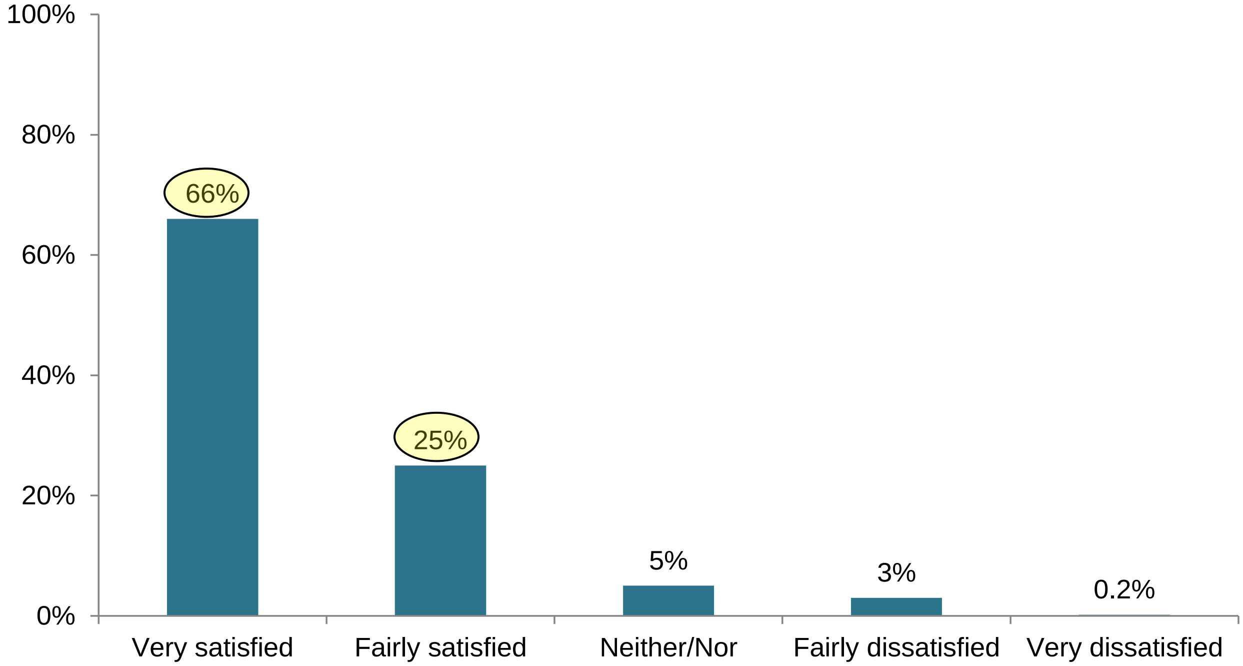
10.4 Satisfaction with Accommodation

10.4.1 Quality of accommodation

Respondents displayed high levels of satisfaction with the quality of accommodation they had experienced, with two-thirds very satisfied and a quarter fairly satisfied resulting in 91% satisfaction overall (very or fairly).

By accommodation type, 82% of respondents staying in self-catering accommodation were very satisfied with the quality whilst for respondents in guest houses/B&Bs the figure was 70% and for hotel guests 51%.

Chart 10.2: Satisfaction with quality of accommodation
Base: online respondents who rated quality of accommodation (479)



Satisfaction levels were high among all visitors types though slightly less so among business respondents. Where there was dissatisfaction, this was more evident among business respondents (almost a tenth).

Table 10.5: Satisfaction with quality of accommodation - total and by type of visit
Base: online respondents who rated quality of accommodation (479)

	Total %	Holiday %	VFR %	Business %
Very satisfied	66	70	63	48
Fairly satisfied	25	24	32	34
Neither/Nor	5	4	-	9
Fairly dissatisfied	3	2	-	9
Very dissatisfied	*	-	5	-
Mean score (out of 5)	4.55	4.63	4.47	4.22

Reasons for being dissatisfied with the quality of accommodation focussed on issues with hotels and guest houses/B&Bs.

"Hotel did not have a wardrobe in the room, just a door hook. 4 star and over £200 I found it shocking."

"Stayed in the XX Inn. Room was damp."

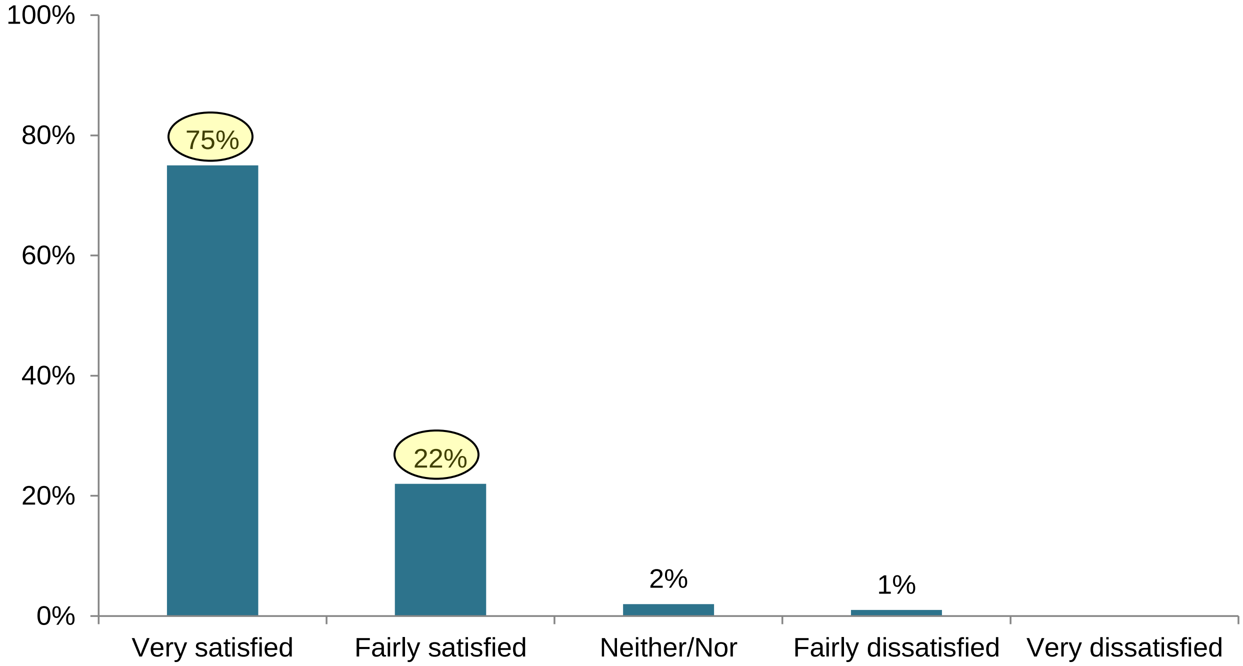
“Very dated, especially the bathroom, poor shower, soft mattress.”

10.4.2 Friendly and efficient service

There were very high levels of satisfaction with the friendly and efficient service that respondents had experienced in their accommodation, with three-quarters very satisfied and over a fifth fairly satisfied, resulting in 97% satisfaction overall (very or fairly).

Respondents staying in self-catering accommodation were most satisfied with the friendly and efficient service (82% very satisfied) whilst 77% of guest house/B&B guests were very satisfied and 65% of hotel guests.

Chart 10.3: Satisfaction with friendly and efficient service
Base: online respondents who rated friendly and efficient service (465)



All types of visitor displayed high levels of satisfaction with the friendly and efficient service with very low levels of dissatisfaction, suggesting that this is not a key issue for visitors.

Table 10.6: Satisfaction with friendly and efficient service - total and by type of visit
Base: online respondents who rated friendly and efficient service (465)

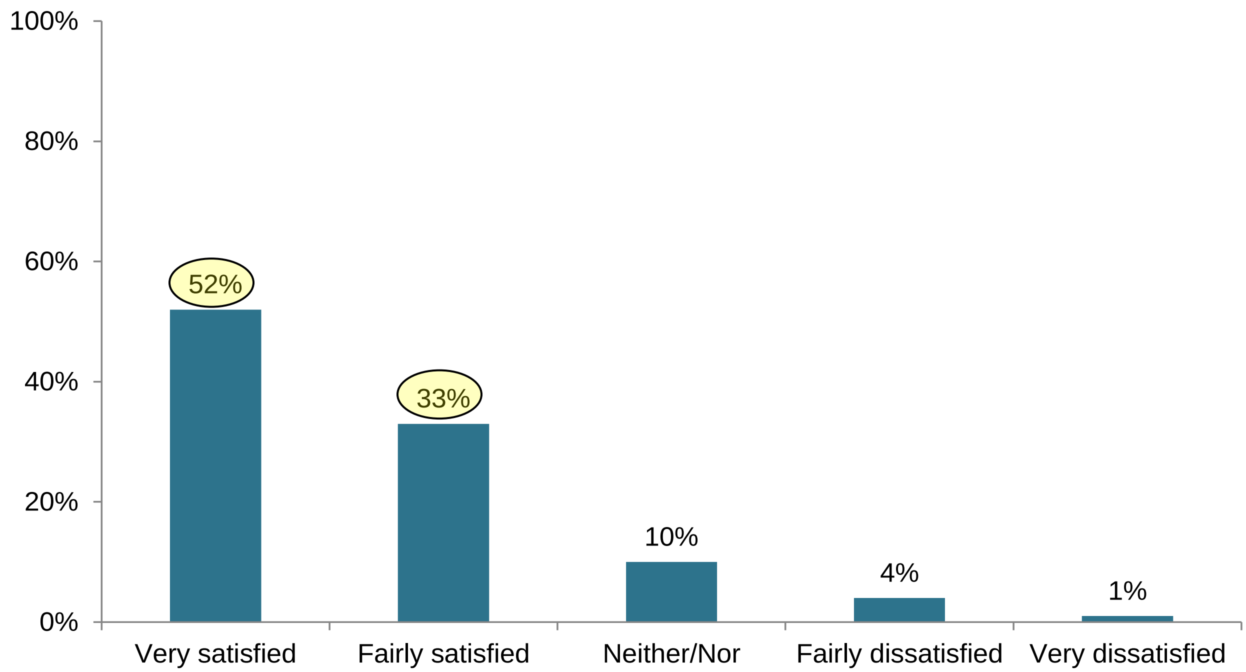
	Total %	Holiday %	VFR %	Business %
Very satisfied	75	78	78	59
Fairly satisfied	22	20	22	34
Neither/Nor	2	1	-	7
Fairly dissatisfied	1	1	-	-
Very dissatisfied	*	-	-	-
Mean score (out of 5)	4.71	4.75	4.78	4.52

10.4.3 Value for money of accommodation

Overall, 85% of respondents staying in paid for accommodation were very or fairly satisfied with the value for money of the accommodation they had used and there were low levels of dissatisfaction.

60% of respondents staying in self-catering accommodation were very satisfied with the value for money they had encountered compared to 54% of guest house/B&B guests and 40% of hotel guests.

Chart 10.4: Satisfaction with value for money of accommodation
Base: online respondents who rated value for money of accommodation (465)



Holiday respondents were particularly satisfied with the value for money of accommodation. Where dissatisfaction was evident, it was most apparent among VFR respondents (over 10%).

Table 10.7: Satisfaction with value for money of accommodation - total & by type of visit
Base: online respondents who rated value for money of accommodation (465)

	Total %	Holiday %	VFR %	Business %
Very satisfied	52	54	41	44
Fairly satisfied	33	33	35	33
Neither/Nor	10	9	12	16
Fairly dissatisfied	4	3	6	7
Very dissatisfied	1	1	6	-
Mean score (out of 5)	4.32	4.37	4.00	4.13

The main reasons for dissatisfaction with the value for money of hotel accommodation was a perception that accommodation was over-priced and lacked facilities, particularly compared with mainland hotels.

"It's very expensive for what it is - £160 for a tiny twin room without a proper bathroom is scandalous."

"Small room no wardrobe. Bathroom mirror too high on wall no working heating. It was not even premier inn standard and they only charge £50.oo per room per night."

"The quality of the rooms, particularly en suite facilities in several hotels was not appropriate for the prices being charged."

10.5 Accommodation – Island Comparisons

Accommodation patterns on the three locations showed consistency:

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

Table 10.8: Accommodation during visit
Base: face-to-face respondents staying overnight

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

Restaurant with rooms	-	-	-		*	-	*		-	-	-
Other	3	4	3		3	2	6		2	-	9

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

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

Table 10.9: Accommodation booking methods
Base: all face-to-face respondents

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

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

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

Table 10.10: Satisfaction with accommodation
Base: online respondents who rated accommodation

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

11. ATTRACTIONS AND ACTIVITIES

11.1 Attractions – Aware of and Visited

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

In terms of awareness before their visit, Callanish Stones (63%), Butt of Lewis (57%) and Luskentyre Harris Tweed (51%) were all known to more than half of respondents, and in general respondents were aware of a wide range of local attractions prior to their visit.

Overall, Callanish Stones (54%) was the attraction most likely to be visited by respondents with Luskentyre/Seilebost beach (34%), Butt of Lewis (32%), Carloway Broch (27%) and Gearrannan Blackhouse Village (26%) also visited by over a quarter of respondents.

Table 11.1: Attractions aware of and visited
Base: online respondents who had visited attractions (792)

	Aware of (before visit) %	Visited %
Lewis		
Callanish Stones	63	54
Butt of Lewis	57	32
Carloway Broch	45	27
Gearrannan Blackhouse Village	41	26
Lews Castle & Grounds	46	22
Arnol Blackhouse	49	21
An Lanntair	28	16
Bosta Iron Age House	36	14
Woodlands Centre	20	10
Norse Mill and Kiln	22	9
Museum nan Eilean	24	5
Stornoway Golf Course	27	3
Shaebost Museum	23	3
Dun Eisdean	18	3
Ravenspoint Centre	12	3
Loch Stiapabhat Nature Reserve	11	3
Harris		
Luskentyre/Seilebost beach	44	34
St Clements Church	28	19
Luskentyre Harris Tweed	51	19
Seallam Visitor Centre	23	9
Bunavoneader Whaling Station	25	6
Clisham	25	6
Teampall at Northton	15	6

Table 11.1: Attractions aware of and visited *(Continued)*
Base: online respondents who had visited attractions (792)

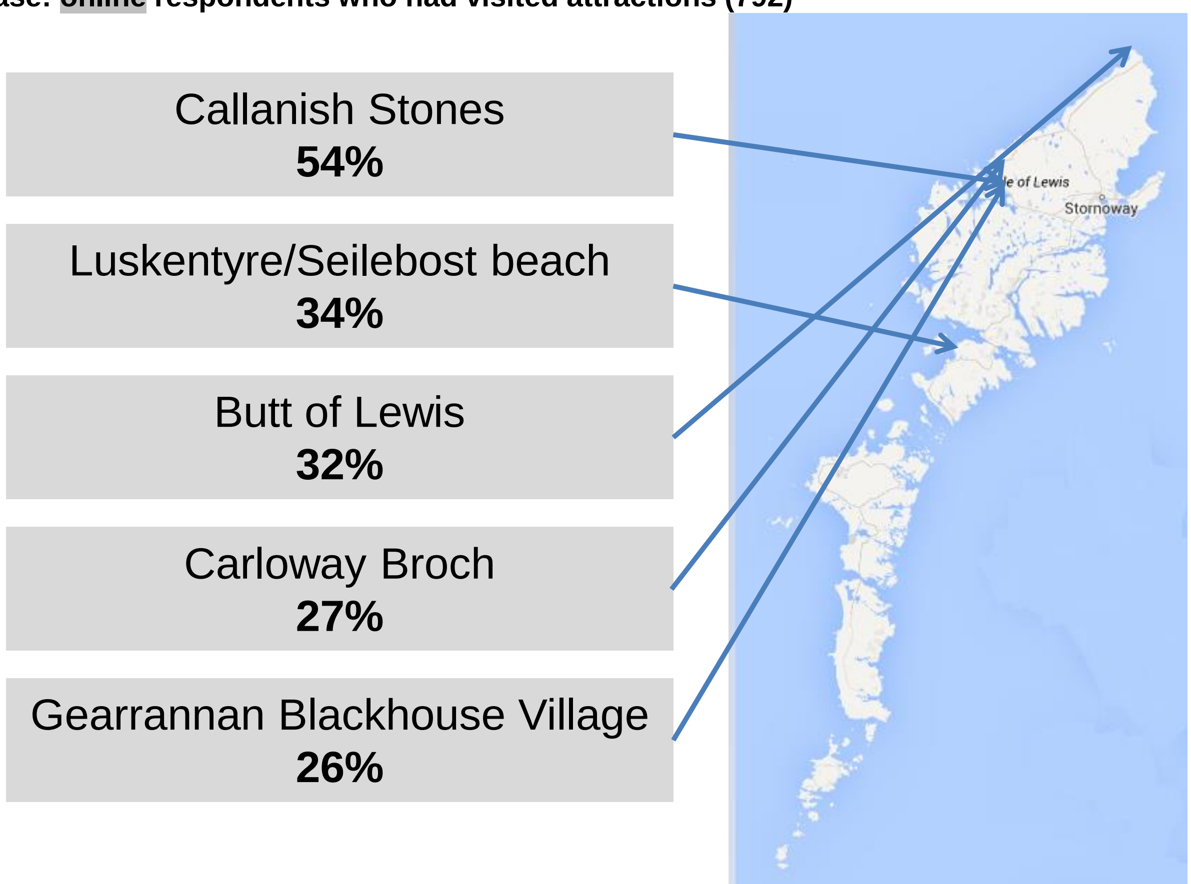
	Aware of (before visit) %	Visited %
Berneray		
Nurses Cottage	5	2
Aird ma-Rhuibhe	3	1
North Uist		
Balranald Nature Reserve	21	12
St Kilda Viewpoint	29	9
Claddach Kirkibost Centre	15	7
Barpa Langass	11	5
Langass Woodland	11	5
Taigh Chearsabhagh	10	4
Scolpaig Tower	9	3
Eilean Domhnuill, Loch Olabhat	7	2
Udal	7	2
Pobull Fionn	5	2
Teampull na Trianaid	8	1
Benbecula		
Cula Bay	10	5
Borve Castle	19	3
Baille nan Cailleach	7	3
Benbecula Golf Course	16	2
Bonnie Prince Charlie Track	12	2
South Uist		
Kildonan Museum	17	9
Our Lady of the Isles	24	8
Flora MacDonald Monument	28	7
Polochar Stone	12	7
Loch Druidibeag Nature Reserve	14	6
Howmore Village and Ancient Chapel	11	5
Askernish / Tom Morris Golf Course	16	3
Ormiclate Castle	10	3
Cille Pheadair	6	2
Cladh Hallan	4	1
Eriskay		
Am Politician	21	10
Prince Charlie Beach	17	9
Eriskay Ponies	24	8

Table 11.1: Attractions aware of and visited *(Continued)*
Base: online respondents who had visited attractions (792)

	Aware of (before visit) %	**Visited** %
Barra		
Airport Beach	40	13
Catalina Plane Site, Vatersay	11	7
Kisimul Castle	29	4
Compton Mackenzie's House and Grave	15	3
Virgin and Child Statue, Heaval	15	3
Cille Bharra	6	3
Barra Golf Course	13	2
Herring Walk	5	2
Allathasdal	4	2
Allt Easdal	3	1

The five most visited attractions in the Outer Hebrides were all based on Lewis or Harris, though overall, fifteen (out of 64) attractions were visited by 10% or more of respondents.

Chart 11.1: Top 5 attractions visited
Base: online respondents who had visited attractions (792)



As one might expect it is holiday respondents who displayed the highest propensity to visit attractions, however, over two-fifths of business respondents had visited Callanish Stones. In general, however, business respondents were least likely to visit attractions.

Table 11.2: Top 5 attractions visited - total and by type of visit
Base: online respondents who had visited attractions (792)

	Total %	Holiday %	VFR %	Business %
Callanish Stones	54	62	29	42
Luskentyre/Seilebost beach	34	41	23	3
Butt of Lewis	32	37	23	19
Carloway Broch	27	32	15	16
Gearrannan Blackhouse Village	26	31	15	10

11.2 Activities Undertaken

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

Respondents undertook a range of activities with beaches/coastal scenery (74%) and short walks (64%) popular with more than half of respondents. The most common main activity was visiting beaches/coastal scenery, undertaken by 21% of respondents, whilst general sightseeing was the main activity for 16% of respondents.

Table 11.3: Activities undertaken – All and main activities
Base: all online respondents (888)

	All activities %	Main activity %
Beaches/coastal scenery	74	21
General sightseeing/tour	42	16
Longer walks - over 2 miles	42	10
Short walk - up to 2 miles	64	7
Archaeological sites	33	4
Photography/painting	32	4
Trying local food	49	3
Cycling on a road/surfaced path	10	3
Shopping for local crafts/products	46	2
Bird watching	29	2
Loch fishing	7	2
Viewpoints/picnic areas	44	1
Nature/wildlife sites	30	1
Other shopping	23	1
Other nature watching (flora/fauna)	22	1
Visits to local leisure centres	12	1
Knitting/textiles	10	1
Family history/genealogy research	6	1
Sea angling	6	1
Visiting Festivals or events	5	1
Water sports	4	1
Special event - personal e.g. wedding	3	1

Table 11.3: Activities undertaken – All and main activities *(Continued)*
Base: all online respondents (888)

Marine wildlife watching	23	*
Geological sites	14	*
Listening to traditional music	12	*
Musical entertainment/activities	7	*
Kayaking	4	*
Golf	3	*
Guided tour	2	*
Mountain biking	2	*
Other sporting activity	2	*
Sailing	1	*
Diving	1	*
Rock climbing	1	*

As with visiting attractions, it is holiday respondents who are most likely to undertake activities, with nearly nine-tenths visiting beaches/coasts. VFR respondents were also very engaged in this and other activities but the pattern amongst business respondents is very mixed with considerably fewer business visitors engaging in activities.

Table 11.4: All activities undertaken (top 5) - total and by type of visit
Base: all online respondents (888)

	Total %	Holiday %	VFR %	Business %
Beaches/coastal scenery	74	87	73	18
Short walk - up to 2 miles	64	73	65	24
Trying local food	49	55	46	23
Shopping for local crafts or local products	46	50	49	20
Viewpoints/picnic areas	44	55	41	4

11.3 Attractions and Activities – Island Comparisons

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

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

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

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

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

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

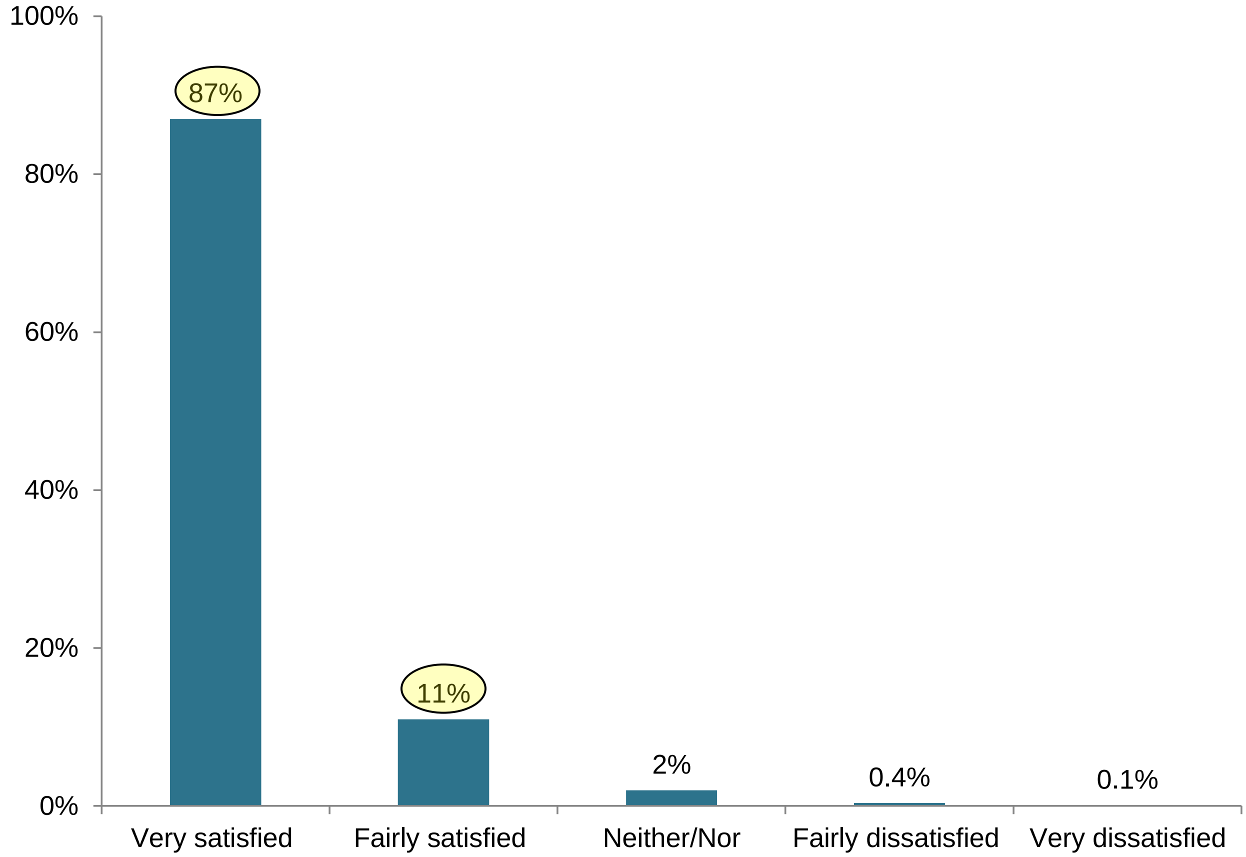
12. SATISFACTION WITH VISIT

12.1 Overall Satisfaction

Respondents' overall satisfaction with their visit was very high, with 98% stating that they were very or fairly satisfied and a negligible amount expressing dissatisfaction. High levels of satisfaction were displayed by respondents of all ages and residences.

Overall satisfaction levels equate to a mean score of 4.84 (out of 5).

Chart 12.1: Overall satisfaction with visit
Base: all face-to-face respondents (1,262)



Satisfaction amongst holiday and VFR respondents was particularly high (over 90% very satisfied). Most business respondents were also satisfied though fewer (74%) were very satisfied. Levels of dissatisfaction were very small.

Table 12.1: Overall satisfaction with visit – by visitor type
Base: all face-to-face respondents (1,262)

	Total %	Holiday %	VFR %	Business %
Very satisfied	87	93	90	74
Fairly satisfied	11	6	9	21
Neither/Nor	2	1	1	4
Fairly dissatisfied	*	*	-	1
Very dissatisfied	*	-	-	*
Mean score (out of 5)	4.84	4.91	4.89	4.69

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

Table 12.2: Overall satisfaction with visit - by quarter
Base: all face-to-face respondents (1,262)

	Q1 % Oct-Dec	Q2 % Jan-Mar	Q3 % Apr-Jun	Q4 % Jul-Sep
Very satisfied	82	76	90	89
Fairly satisfied	16	20	8	9
Neither/Nor	3	3	2	1
Fairly dissatisfied	-	1	*	1
Very dissatisfied	-	-	*	-
Mean score (out of 5)	4.79	4.72	4.87	4.87

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

“Beaches. Blackhouses and Blackhouse Village. Beaches were the best - coast is lovely. Very impressive.”

"Watching the deer along the road at sunset. Enjoying sunbathing on Hushinish. Picnicking close to Uig."

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

"Scenery, beaches, wildlife and walks."

"Beaches, scenery, weather and welcoming, friendly nature of the people."

"Beach in Harris. Views. Nature. Seeing the wildlife."

The **peace and quiet** was also important to visitors

"Walking on beaches and enjoying the sound of silence."

"Scenery, peace, tranquillity and relaxation."

Apart from the natural attractions of the islands, **the visitor attractions** were key highlights, especially the Callanish Stones.

"We loved our visit to Lewis, especially the Callanish standing stones: these were beautiful and we were very surprised by the beautiful beaches on the island."

"Callanish Stones. Blackhouse Museum. The roads on Harris. Countryside very beautiful."

Visitors also highlighted **the friendliness of local people** and **good customer service.**

"Friendliness of people – good service at the hotel."

"People very friendly. Nice place to be."

Respondents were asked if there was any aspect of their visit they were not satisfied with. Apart from 'midgies' and 'the weather', the main areas of dissatisfaction related to:

- lack of cafes/restaurants

"Could not get anything to eat after 4pm."

"Eating places, apart from hotels, close early."

Food catering for visitors. Not enough cafes, not open enough hours, customer service very poor."

- quality of accommodation, particularly hotels

"Hotel had no one in reception at 1pm, shower so weak, toilet small and radiator did not work."

"Hotel did not live up to expectations. Room did not have promised view."

"Hotel extremely unsatisfactory. Overpriced, no facilities, food bad, customer service non-existent."

- Sunday closing

"Nothing open on a Sunday, annoying when needing provisions after a Saturday pm arrival."

"People not happy on a Sunday and could not get anywhere to eat."

"Places shut on Lewis on Sunday."

"Sunday - Dourness. Nothing open or to do. Buses do not meet with trains on return journey."

- Poor signage/information

"Lack of signs on the Machair Trail. No distances on road signs."

"Signposts to specific places: tourist attractions are not signed."

"Signposts for visitor centres, and mileage."

12.1.1 Satisfaction – specific elements of visit

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

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

	Very satisfied %	Fairly satisfied %	Neither/ Nor %	Fairly dissatisfied %	Very dissatisfied %	Mean score (Out of 5)
Quality of visitor attractions, historic sites, museums, visitor centres	42	43	13	1	*	4.26
Value for money of visitor attractions, historic sites, museums, visitor centres	40	43	16	1	*	4.21
Quality of local food and drink products	36	47	15	2	*	4.15
Availability of information locally about places to visit during trip	33	49	14	3	*	4.12
Quality of local arts and crafts products	34	44	20	1	*	4.09
Availability of local produce when dining out	32	47	16	5	1	4.04
Signposting	33	44	17	5	1	4.03
Value for money dining out	25	56	15	4	1	3.99
Value for money of local arts and crafts products	21	46	28	5	1	3.80
Opportunities to attend local events/ festivals	21	39	35	5	1	3.74

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

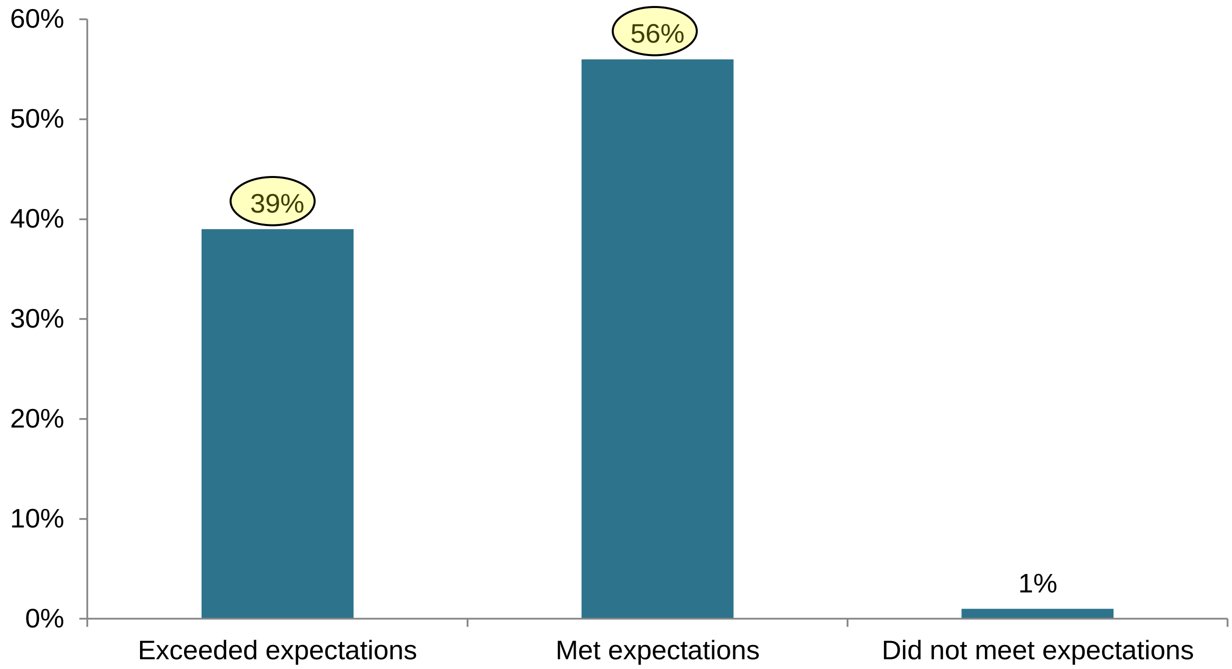
Table 12.4: Satisfaction with specific elements of visit - by visitor type
Base: online respondents who rated specific elements of visit

	Total Mean score (Out of 5)	Holiday Mean score (Out of 5)	VFR Mean score (Out of 5)	Business Mean score (Out of 5)
Quality of visitor attractions, historic sites, museums, visitor centres	4.26	4.33	4.10	3.96
Value for money of visitor attractions, historic sites, museums, visitor centres	4.21	4.26	4.15	3.84
Quality of local food and drink products	4.15	4.13	4.22	4.08
Availability of information locally about places to visit during trip	4.12	4.14	4.14	4.00
Quality of local arts and crafts products	4.09	4.07	4.25	3.92
Availability of local produce when dining out	4.04	4.03	4.11	3.97
Signposting	4.03	4.05	4.09	3.86
Value for money dining out	3.99	4.04	3.93	3.90
Value for money of local arts and crafts products	3.80	3.79	3.88	3.90
Opportunities to attend local events/ festivals	3.74	3.61	4.14	3.72

12.2 Visitor Expectations

Nearly two-fifths of respondents felt their visit to the Outer Hebrides had exceeded their expectations, whilst over half felt their expectations had been met. A negligible percentage of respondents felt their expectations had not been met.

Chart 12.2: Extent to which expectations were met
Base: all online respondents (888)



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

Table 12.5: Extent to which expectations were met - total and by visitor type
Base: all online respondents (888)

	Total %	Holiday %	VFR %	Business %
Exceeded expectations	39	47	29	17
Met expectations	56	51	66	70
Did not meet expectations	1	1	1	2
Not sure/can't say	4	2	3	12

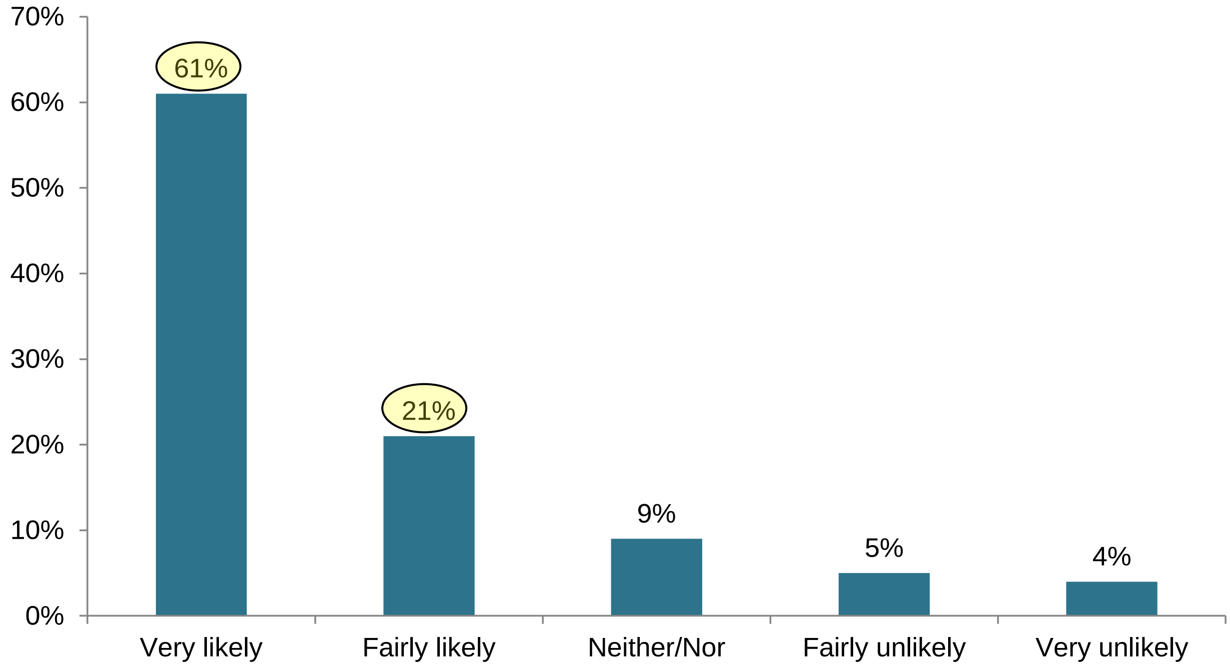
Comments from visitors on areas for improvement highlighted the different priorities of the visitor types. The main issues identified from the comments were:

- **Holiday**
    - reduce costs – inter-island and other ferries
    - improved information/signage
    - encourage business to stay open all week/year
    - reduce costs of travel to and on island
- **VFR**
    - reduce costs of flights, ferries, petrol, etc.
- **Business**
    - reduce transport/travel costs (especially flight)

12.3 Likelihood of Returning

Respondents were asked how likely they would be to visit the Outer Hebrides in the next five years for a leisure holiday or short break. Four-fifths (82%) indicated that they were likely to do so, with three-fifths very likely to do so.

Chart 12.3: Likelihood of re-visiting within five years
Base: all online respondents (888)



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

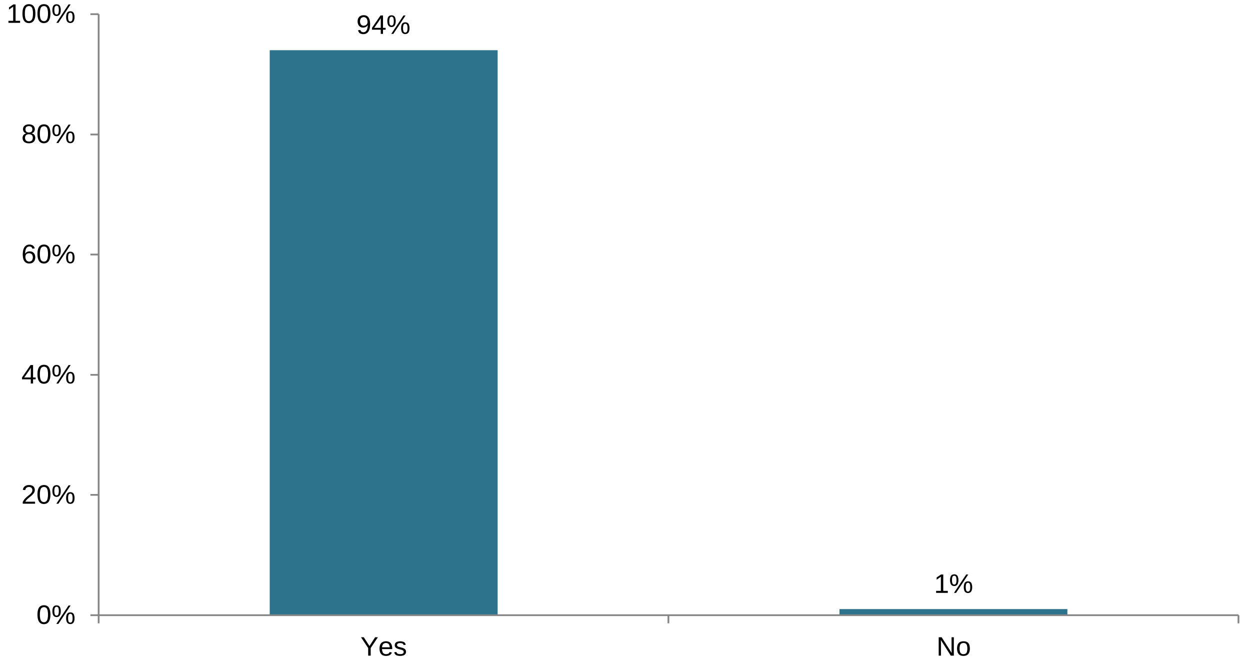
Table 12.6: Likelihood of re-visiting within five years – total and by visitor type
Base: all online respondents (888)

	Total %	Holiday %	VFR %	Business %
Very likely	61	55	87	51
Fairly likely	21	24	7	28
Neither/Nor	9	11	3	12
Fairly unlikely	5	6	-	5
Very unlikely	4	4	3	4

12.4 Likelihood of Recommending

The vast majority of respondents stated that they would be likely to recommend the Outer Hebrides to others as a holiday destination.

Chart 12.4: Likelihood of recommending the Outer Hebrides
Base: all online respondents (888)



All respondent types were very likely to recommend the Outer Hebrides.

Table 12.7: Likelihood of recommending the Outer Hebrides – total and by visitor type
Base: all online respondents (888)

	Total %	Holiday %	VFR %	Business %
Yes	94	95	92	90
No	1	1	2	4
Don’t know	4	3	4	6

12.5 Satisfaction with Visit – Island Comparisons

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

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

Table 12.8: Overall satisfaction / Satisfaction with specific elements of visit
Base: all online respondents

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

Respondents overall views on their visit showed some island variations:

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

Table 12.9: Overall views on visit
Base: all online respondents

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

APPENDIX 1: FACE-TO-FACE EXIT SURVEY QUESTIONNAIRE

OUTER HEBRIDES VISITOR SURVEY - FACE TO FACE INTERVIEWS - QUESTIONNAIRE

SECTION ONE: INTERVIEW DETAILS

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

Interviewer name ....Signature ....

Date of interview ____________________________________ Month ________________________________

SECTION TWO: INTERVIEWER TO COMPLETE

A **Day of week of interview**

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

B **Interview location**

Stornoway airport 1
Benbecula airport 2
Barra airport...............3
Stornoway ferry 4
Tarbert ferry................5
Lochmaddy ferry.........6
Lochboisdale ferry 7
Castlebay ferry 8

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

SECTION THREE: ABOUT THE RESPONDENT

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

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

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

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

Yes...1 CLOSE INTERVIEW
No 2

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

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

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

Yes...1 CLOSE INTERVIEW
No...2

SHOWCARD A

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

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

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

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

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

Government/local government	1	GO TO Q4.1
Renewable energy	2	
Oil/gas	3	
Retail sales/service	4	
Media	5	
Tourism	6	
Food/drink manufacture	7	
Transport - shipping, etc	8	
Fishing	9	
Health services	10	
Financial services	11	
IT	12	
Industrial manufacturing	13	
Other WRITE IN	14	

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

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

3.8. **What was the main reason for choosing to visit the Outer Hebrides? DO NOT PROMPT**

ASK ALL

SECTION FOUR: LENGTH OF VISIT

4.1. **Approximately how many times have you visited the Outer Hebrides before? ONE ANSWER ONLY PROMPT IF NECESSARY**

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

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

In the Outer Hebrides.......................... ______________
Elsewhere in Scotland.......................... ______________
In total during your trip away from home... ______________

SHOW CARD B

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

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

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

	4.3 Visit	**4.4** Number of nights
Lewis (including Great Bernera)	1	
Harris (including Scalpay)	2	
North Uist (including Berneray)	3	
Benbecula	4	
South Uist	5	
Eriskay	6	
Barra (including Vatersay)	7	
Total nights in Outer Hebrides **CHECK WITH OUTER HEBRIDES TOTAL AT Q4.2**		

SECTION FIVE: TRANSPORT

5.1. Which airport or ferry terminal did you arrive in the Outer Hebrides from? ONE ANSWER ONLY

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

	5.1 Arrived from	5.2 Departing to
Ullapool - ferry	1	1
Uig (to Tarbert) - ferry	2	2
Uig (to Lochmaddy) - ferry	3	3
Oban (to Castlebay) - ferry	4	4
Oban (to Lochboisdale) - ferry	5	5
Inverness - flight	6	6
Aberdeen - flight	7	7
Glasgow - flight	8	8
Edinburgh - flight	9	9

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

5.4. Did you have any issues when you booked your travel to the Outer Hebrides?

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

SHOW CARD C

5.5. Did you have any of the following issues when you booked your travel to the Outer Hebrides? READ OUT LIST – MORE THAN ONE ANSWER POSSIBLE

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

SHOW CARD D

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

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

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

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

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

SHOW CARD E

5.9. **What was the main type of transport you used during your visit to the Outer Hebrides? ONE ANSWER ONLY**

5.10. **And what other types of transport did you use during your visit to the Outer Hebrides? EXCLUDES TRANSPORT MENTIONED AT Q5.9. MORE THAN ONE ANSWER POSSIBLE**

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

SECTION SIX: ACCOMMODATION

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

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

Hotel (5 star/luxury)	1	ASK Q6.2
Hotel (4 star)	2	
Hotel (3 star)	3	
Hotel (1-2 star)	4	
Inn	5	
Restaurant with rooms	6	
Guest house/bed and breakfast	7	
Self-catering - rented house/cottage/chalet	8	
Hostel	9	
Camping Bod (not applicable to Outer Hebrides)	10	
Static caravan	11	
Touring caravan pitch at serviced campsite	12	GO TO Q6.4
Tent at serviced campsite	13	
Tent (non-campsite)	14	
Motorhome at serviced campsite	15	
Motorhome (non-campsite)	16	
Staying with friends/family	17	
Second home	18	
Workers' accommodation on-site/rig	19	
Other WRITE IN	20	

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

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

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

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

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

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

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

SECTION SEVEN: SATISFACTION WITH VISIT

SHOW CARD F

7.1. Overall how satisfied were you with your visit to the Outer Hebrides?

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

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

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

SECTION EIGHT: EXPENDITURE

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

8.1. How many people, including yourself, are in your immediate group or party?

WRITE IN NUMBER, INCLUDING RESPONDENT

SHOW CARD G

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

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

	8.2 Females	8.3 Males
Under 16		
16-24		
25-34		
35-44		
45-54		
55-64		
over 65		
Total number		

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

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

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

WRITE IN WHO ELSE ON TRIP

____

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

Yes.. 1 SEE INSTRUCTION BELOW
No 2

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

SHOW CARD H

8.6. **How much did you and your immediate party/group spend on the following items in total during your trip? PUT IN EXACT AMOUNT STATED IN £. IF THEY CANNOT STATE EXACT AMOUNT, AN ESTIMATE WILL DO.**

	£ spent
Price of package/inclusive holiday	
Travel to and from the mainland/departure point	
Travel costs on the island (fuel, hire charges, public transport, etc.)	
Accommodation including any food and drink at premises	
Food and drink bought elsewhere (prepared by yourself or in cafe/restaurant)	
Entertainment and Recreation including admission fees to attractions, tours, trips and other activities	
Shopping for gifts, souvenirs, crafts, etc.	
Shopping not included above	
Miscellaneous spend not included above	
Total cost of trip - TO BE COMPLETED IN OFFICE	

SHOW CARD I

8.7. **Within the expenditure figures given above, how much have you and your immediate party/group spent on the following local products or produce during this trip? PUT IN NUMBERS IN £.**

Local crafts such as jewellery, pottery, furniture, textiles, paintings............................ ______________
Local food such as fish, meat, cheese, sweets, fudge, ice cream, oatcakes................ ______________
Local beverages/drinks such as whisky, wine, beer, non-alcoholic drinks................. ______________
Total amount spent on local products/produce - TO BE COMPLETED IN OFFICE... ______________

SECTION NINE: DEMOGRAPHICS - RESPONDENT

EXPLAIN THAT THE FINAL QUESTIONS ASK FOR DETAILS OF THE RESPONDENT IN ORDER TO CLASSIFY THE RESULTS. THIS INFORMATION IS ENTIRELY CONFIDENTIAL AND WILL ONLY BE USED FOR THE PURPOSES OF ANALYSING THE RESULTS OF THE SURVEY.

9.1. **Gender of respondent. DO NOT ASK**

Male 1
Female.. 2

9.2. Where do you normally live? ONE ANSWER ONLY

Scotland	1	ASK Q9.3
England	2	ASK Q9.4
Wales	3	GO TO Q9.5
Northern Ireland	4	
Other UK e.g. Isle of Man	5	
Republic of Ireland	6	
Norway	7	
France	8	
Germany	9	
Italy	10	
Spain	11	
Netherlands	12	
Other Europe WRITE IN	13	
USA	14	
Canada	15	
Australia	16	
New Zealand	17	
Other country WRITE IN	18	

9.3. Which local authority area of Scotland do you live in? ONE ANSWER ONLY

Aberdeen City	1	Highland	17
Aberdeenshire	2	Inverclyde	18
Angus	3	Midlothian	19
Argyll & Bute	4	Moray	20
Clackmannanshire	5	North Ayrshire	21
Dumfries & Galloway	6	North Lanarkshire	22
Dundee City	7	Orkney Islands	23
East Ayrshire	8	Perth & Kinross	24
East Dunbartonshire	9	Renfrewshire	25
East Lothian	10	Scottish Borders	26
East Renfrewshire	11	Shetland Islands	27
Edinburgh, City of	12	South Ayrshire	28
Eilean Siar - not applicable	13	South Lanarkshire	29
Falkirk	14	Stirling	30
Fife	15	West Dunbartonshire	31
Glasgow City	16	West Lothian	32

SHOW CARD J

9.4. Which area of England do you live in? ONE ANSWER ONLY

Greater London	1
South East	2
South West	3
East Midlands	4
West Midlands	5
East Anglia/East of England	6
Yorkshire/Humberside	7
North East	8
North West	9

SHOW CARD K

9.5. Which of the following age groups are you in? ONE ANSWER ONLY

16-24	1
25-34	2
35-44	3
45-54	4
55-64	5
Over 65	6

SHOW CARD L

9.6. **Which of these best describes the occupation of the main income earner in your household? ONE ANSWER ONLY**

	High managerial, administrative or professional - e.g. doctor, lawyer, company director (50+ people), judge, surgeon, school headteacher, etc....	1	GO TO SECTION TEN
	Intermediate managerial, administrative or professional - e.g. school teacher, office manager, junior doctor, bank manager, police inspector, accountant etc.	2	
	Supervisor; clerical; junior managerial, administrative or professional - e.g. policeman, nurse, secretary, clerk, self-employed (5+ people) etc.	3	
	Skilled manual worker - e.g. mechanic, plumber, electrician, lorry driver, train driver etc.	4	
	Semi-skilled or unskilled manual worker - e.g. baggage handler, waiter, factory worker, receptionist, labourer, gardener etc.	5	
	Housewife / homemaker	6	
	Unemployed	7	
	Student........	8	
	Retired	9	ASK Q9.7

9.7. **You say that the main income earner in the household is now retired.**
Which of the following best describes their occupation before they retired? ONE ANSWER ONLY

	High managerial, administrative or professional - e.g. doctor, lawyer, company director (50+ people), judge, surgeon, school headteacher, etc........	1
	Intermediate managerial, administrative or professional - e.g. school teacher, office manager, junior doctor, bank manager, police inspector, accountant etc.	2
	Supervisor; clerical; junior managerial, administrative or professional - e.g. policeman, nurse, secretary, clerk, self-employed (5+ people) etc........	3
	Skilled manual worker - e.g. mechanic, plumber, electrician, lorry driver, train driver etc.	4
	Semi-skilled or unskilled manual worker - e.g. baggage handler, waiter, factory worker, receptionist, labourer, gardener etc.	5
	Housewife / homemaker	6
	Unemployed	7
	Student........	8

SOCIO ECONOMIC CLASSIFICATION - TO BE CODED IN OFFICE

	A (1)	1	C2 (4)	4
	B (2)	2	D (5)	5
	C1 (3 AND 8)	3	E (6 AND 7)	6

SECTION TEN: DETAILS FOR ONLINE SURVEY

Would you be interested in receiving an online survey asking about your experiences on the Outer Hebrides with the chance to win an iPad? The online survey will ask you for more detailed views about your visit and your feedback will help improve the visitor experience in the Outer Hebrides.
STRESS CONFIDENTIALITY OF DETAILS AND COMPLIANCE WITH DATA PROTECTION ACT

If you provide your email address I will arrange for you to be sent the online link to the questionnaire in the next few weeks - this will give you the chance to enter a prize draw for an iPad.
Email ______________________________

IF RESPONDENT DOES NOT WISH TO PROVIDE EMAIL EXPLAIN THAT WE CAN POST A QUESTIONNAIRE TO THEM IF THEY WISH TO TAKE PART IN THE SURVEY. ASK FOR FULL POSTAL ADDRESS, INCLUDING POSTCODE

____

COLLECT RESPONDENT PHONE NUMBER FOR BACK CHECKING AND CLOSE INTERVIEW

Respondent name ______________________ **Telephone** ______________________
If phone not available ask for email or address ______________________

THANK RESPONDENT AND HAND OUT THANK YOU CARD

APPENDIX 2: ONLINE SURVEY QUESTIONNAIRE

TELL US ABOUT YOUR VISIT

Please complete the questionnaire by clicking the appropriate buttons and typing your respones in the boxes provided. If you would like to enter the free prize draw for an iPad please provide your email address at the end of the questionnaire.

The questionnaire should take approximately ten minutes to complete. Once you are finished just press 'submit'. Thanks again.

Section 1: Details of Your Visit
This section asks you to confirm details of your recent visit.

Please tick one box to show which island you were visiting when you took part in the survey.

- Orkney
- The Outer Hebrides
- Shetland

NOTE: The Outer Hebrides includes Lewis, Harris, Berneray, North Uist, Benbecula, South Uist, Eriskay and Barra & Vatersay

What month was your visit to {Q1.1}? If it covered more than one month, please tick the month you spent most days in {Q1.1}.

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

Which of the following best describes your recent visit to {Q1.1}

- Holiday - day trip
- Visiting friends or relatives for leisure/holiday - day trip
- Holiday/short break involving staying overnight on island
- Visiting friends or relatives for leisure/holiday - overnight trip
- On business - day trip
- On business staying overnight on island
- Combining business and holiday
- Other

Other, please specify

Section 2: Planning Your Visit

Did you consider visiting either of the following islands rather than going to {Q1.1}?

- The Outer Hebrides
- Shetland
- No did not consider visiting these other islands

Section 2: Planning Your Visit

Did you consider visiting either of the following islands rather than going to {Q1.1} on your most recent trip?

- Orkney
- Shetland
- No did not consider visiting these other islands

Section 2: Planning Your Visit

Did you consider visiting either of the following islands rather than going to {Q1.1} on your most recent trip?

- Orkney
- The Outer Hebrides
- No did not consider visiting these other islands

Why did you choose {Q1.1} rather than the other island/s?

Which of the following, if any, influenced your decision to visit {Q1.1}

- Experience of previous visit/know area
- Recommendation from friend/relative
- Newspaper or magazine article
- Newspaper or magazine advertisement
- Radio or TV programme about {Q1.1}
- Radio/TV advertisement about {Q1.1}
- Tourist Brochure
- Internet/website
- Social media (Facebook/Twitter)
- Guide books
- Family connections with the area
- A film/movie or book featuring the area
- Interest in the archaeology/history
- Interest in scenery/landscape
- Specific activities such as walking or golf
- Particular events/festivals
- Interest in particular attractions
- To undertake particular activities
- To stay in particular accommodation
- Other reason
- None of these
- Don't know/can't remember

Please specify the event/festival you were most interested in

Please specify the attraction you were most interested in

Please specify the activity you were most interested in

Please specify the accommodation you most wanted to stay in

Please specify the other reason that influenced your decision to visit

Which of the following, if any, influenced your decision to visit {Q1.1}?

- Experience of previous visit/know area
- Recommendation from friend/relative
- Newspaper or magazine article
- Newspaper or magazine advertisement
- Radio or TV programme about {Q1.1}
- Radio/TV advertisement about {Q1.1}
- Tourist Brochure
- Internet/website
- Social media (Facebook/Twitter)
- Guide books
- Family connections with the area
- A film/movie or book featuring the area
- Interest in the archaeology/history
- Interest in scenery/landscape
- Specific activities such as walking or golf
- A particular event/festival
- Interest in particular attraction
- To undertake a particular activity
- To stay in particular accommodation
- Interest in geology (Geopark Shetland)
- Shetland webcams
- Promote Shetland direct mail/email
- Other reason
- None of these
- Don't know/can't remember

Please specify the attraction you were interested in

Please specify the activity you were interested in

Please specify the accommodation you wanted to stay in

Please specify the other reason that influenced your decision to visit

Was your first visit to {Q1.1} a

- visit by cruise ship
- day visit by coach tour
- None of the above

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

- Less than 2 weeks
- 2 weeks up to 4 weeks
- 1 to 2 months
- 3 to 6 months
- Over 6 months to 1 year
- Over 1 to 2 years
- Over 2 years
- Not sure/don't know

How far in advance did you <u>book</u> your recent trip? i.e how much time was there between booking the trip and going?

- Didn't book in advance
- Less than 2 weeks
- 2 weeks up to 4 weeks
- 1 to 2 months
- 3 to 6 months
- Over 6 months
- Not sure/don't know

Section 3: Island Attractions

Did you visit any visitor attractions during your business trip to {Q1.1}

- Yes
- No
- Don't know

Section 3: Orkney Island Attractions

The next few questions will ask you about a range of attractions on Orkney. We're interested in understanding your awareness of these attractioons and whether you visited them on you recent trip.

Which of these visitor attractions in Kirkwall have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
St Magnus Cathedral		
Bishop's Palace and/or Earls Palace		
Orkney Museum		
Orkney Wireless Museum		
Highland Park Distillery		
Ortak Visit Centre		
Pickaquoy Centre		

Section 3: Orkney Island Attractions

Which of these visitor attractions in Stromness have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Pier Arts Centre		
Stromness Museum		
Ness Battery		

Section 3: Orkney Island Attractions

Which of these visitor attractions in East Mainland, Burray/South Ronaldsay have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Lamb Holm - Italian Chapel		
Burray - Fossil and Vintage Centre		
South Ronaldsay - Tomb of the Eagles		
South Ronaldsay - Marine Life Aquarium		
South Ronaldsay - Smithy Museum		
Sheila Fleet Visitor Centre		

Section 3: Orkney Island Attractions

Which of these visitor attractions in West Mainland have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Skara Brae		
Sandwick - Skaill House		
Stenness - Standing Stones		
Stenness - Maeshowe		
Stenness - Ring of Brodgar		
Quoyloo - Orkney Brewery Visitor Centre		
Evie - Broch of Gurness		
Brough of Birsay		
Birsay - Earl's Palace		
Birsay - Kirbuster Museum		
Harray - Corrigal Museum		
Marwick Head		

Section 3: The Outer Hebrides Island Attractions

The next few questions will ask you about a range of attractions on the Outer Hebrides. We're interested in understanding your awareness of these attractioons and whether you visited them on you recent trip.

Which of these visitor attractions on Lewis have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
An Lanntair		
Arnol Blackhouse		
Bosta Iron Age House		
Butt of Lewis		
Callanish Stones		
Carloway Broch		
Dun Eisdean		
Gearrannan Blackhouse Village		
Lews Castle & Gounds		
Loch Stiapabhat Nature Reserve		
Norse Mill and Kiln		
Museum nan Eilean		
Ravenspoint Centre		
Shawbost Museum		
Stornoway Golf Course		
Woodlands Centre		

Section 3: The Outer Hebrides Island Attractions

Which of these visitor attractions on Harris have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Bunavoneader Whaling Station		
Clisham		
Luskentyre Harris Tweed		
Luskentyre/Seilebost beach		
Seallam Visitor Centre		
St Clements Church		
Teampall at Northton		

Section 3: The Outer Hebrides Island Attractions

Which of these visitor attractions on North Uist and Berneray have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Balranald Nature Reserve		
Barpa Langass		
Claddach Kirkibost Centre		
Eilean Domhnuill, Loch Olabhat		
Langass Woodland		
Pobull Fionn		
Scolpaig Tower		
St Kilda Viewpoint		
Taigh Chearsabhagh		
Teampull na Trianaid		
Udal		
Aird ma-Rhuibhe		
Nurses Cottage		

Section 3: The Outer Hebrides Island Attractions

Which of these visitor attractions on Benbecula have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Baille nan Cailleach		
Benbecula Golf Course		
Bonnie Prince Charlie Track		
Borve Castle		
Cula Bay		

Section 3: The Outer Hebrides Island Attractions

Which of these visitor attractions on South Uist and Eriskay have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Askernish / Tom Morris Golf Course		
Cille Pheadair		
Cladh Hallan		
Flore MacDonald Monument		
Howmore Village and Ancient Chapel		
Kildonan Museum		
Loch Druidibeag Nature Reserve		
Ormiclate Castle		
Our Lady of the Isles		
Polochar Stone		
Am Politician		
Eriskay Ponies		
Prince Charlie Beach		

Section 3: The Outer Hebrides Island Attractions

Which of these visitor attractions on Barra and Vatersay have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Airport Beach		
Allathasdal		
Allt Easdal		
Barra Golf Course		
Catalina Plane Site, Vatersay		
Cille Bharra		
Compton Mackenzie's House and Grave		
Herring Walk		
Kisimul Castle		
Virgin and Child Statue, Heaval		

Section 3: Shetland Island Attractions

The next few questions will ask you about a range of attractions on Shetland. We're interested in understanding your awareness of these attractioons and whether you visited them on you recent trip.

Which of these visitor attractions on the North Isles have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Hermaness Nature Reserve and Visitor Centre		
Unst Heritage Centre & Unst Boat Haven		
Viking Unst		
Keen of Hamar		
Hagdale Horse Mill		
Muness Castle		
Fetlar Interpretive Centre		
Fetlar RSPB Reserve		
Old Haa		

Section 3: Shetland Island Attractions

Which of these visitor attractions in Northmavine, Lunnasting and Whalsay have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Ronas Hill		
Eshaness		
Tangwick Haa Museum		
Lunna Kirk		
Whalsay Heritage Centre		
Hanseatic Booth, Whalsay		
The Cabin Museum		

Section 3: Shetland Island Attractions

Which of these visitor attractions in the Westside and Central Mainland have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Huxter Mills		
Stanydale Temple		
Weisdale Mill (Bonhoga Gallery)		
Scalloway Museum		
Scalloway Castle		
Burland Croft Trail		
Burra Heritage Centre (Easthouse)		

Section 3: Shetland Island Attractions

Which of these visitor attractions in Lerwick and Bressay have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Shetland Textile Museum / Böd of Gremista		
Shetland Museum and Archives		
Mareel		
Shetland Family History Society		
Fort Charlotte		
Galley Shed Lerwick: Up Helly Aa Exhibition		
Clickimin Broch		
Bressay Heritage Centre		
Noss		

Section 3: Shetland Island Attractions

Which of these visitor attractions in the South Mainland and Fair Isle have you heard of and which did you visit on your recent trip?

Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.

NOTE: If you have not heard of any of these attractions please click 'Next' to continue.

	Heard of	Visited on this trip
Hoswick Visitor Centre		
Mousa Broch		
St Ninian's Isle		
Croft House Museum		
Quendale Water Mill		
Old Scatness Broch and Iron Age Village		
Jarlshof		
RSPB Sumburgh Head Reserve		
Fair Isle Bird Observatory		
George Waterson Memorial Centre, Fair Isle		

Please tick the boxes below to indicate if you took part in any of the listed activities during your recent visit to {Q1.1}.

NOTE: If you took part in none of these activities please click '<u>Next</u>' to continue.

- Visits to local leisure centres
- Loch fishing
- Sea angling
- Cycling on a road/surfaced path
- Mountain biking
- Short walk - up to 2 miles
- Longer walks - over 2 miles
- Golf
- Diving
- Saliing
- Kayaking
- Rock climbing
- Watersports
- Other sporting activity
- General sightseeing/tour
- Bird watching
- Marine wildlife watching
- Other nature watching (flora/fauna)
- Family history/genealogy research
- Photography/painting
- Knitting/textiles
- Musical entertainment/activities
- Listening to traditional music
- Guided tour
- Shopping for local crafts or local products
- Other shopping
- Trying local food
- Visiting Festivals or events
- Special event - personal e.g. wedding
- Nature/wildlife sites
- Archaeological sites
- Geological sites
- Beaches/coastal scenery
- Viewpoints/picnic areas
- Other

Please type in the watersports activity you took part in

Please type in the other sporting activities you took part in

Please type in the other activities you took part in

Of the activities you took part in during your visit to {Q1.1}which was your main activity?

- Visits to local leisure centres
- Loch fishing
- Sea angling
- Cycling on a road/surfaced path
- Mountain biking
- Short walk - up to 2 miles
- Longer walks - over 2 miles
- Golf
- Diving
- Saliing
- Kayaking
- Rock climbing
- Watersports
- Other sporting activity
- General sightseeing/tour
- Bird watching
- Marine wildlife watching
- Other nature watching (flora/fauna)
- Family history/genealogy research
- Photography/painting
- Knitting/textiles
- Musical entertainment/activities
- Listening to traditional music
- Guided tour
- Shopping for local crafts or local products
- Other shopping
- Trying local food
- Visiting Festivals or events
- Special event - personal e.g. wedding
- Nature/wildlife sites
- Archaeological sites
- Geological sites
- Beaches/coastal scenery
- Viewpoints/picnic areas
- Other

Section 4: Source of information for visit

Which of the following information sources did you use to find out about or research {Q1.1} __before__ you arrived?

- Internet/websites
- Social media (Facebook/Twitter)
- Tourist Board brochures/leaflets
- Visitor Information Centre
- Travel Agent
- Travel operators (ferries, airlines)
- Guidebooks
- Friends/relatives/advice from others
- Other information source
- None

Where was the Visitor Information Centre you used (e.g. Inverness, Glasgow)

Please describe the other source/s

Section 4: Source of information for visit

Which of the following information sources did you use to find out about or research {Q1.1} __before__ you arrived?

- Internet/websites
- Social media (Facebook/Twitter)
- Tourist Board brochures/leaflets
- Visitor Information Centre
- Travel Agent
- Travel operators (ferries, airlines)
- Guidebooks
- Friends/relatives/advice from others
- Promote Shetland email/telephone
- Promote Shetland Pocket Guide
- Other information source
- None of the above

Where was the Visitor Information Centre you used (e.g. Aberdeen, Inverness)

Please describe the other source/s

Which of the following did you <u>research</u> via the internet/websites

- Accommodation
- Transport to destination
- Transport from destination
- Visitor centres/visitor attractions
- Activities
- Festivals/Events
- History/culture
- Genealogy/family history
- Natural history
- None of the above
- Other

Please describe the other research via the internet/websites

Which of the following did you <u>book</u> via the internet/websites

- Accommodation
- Transport to destination
- Transport from destination
- Visitor centres/visitor attractions
- Activities
- Festival/Event tickets
- None of the above
- Other

Please describe the other booking made via internet/websites

Please write in the names of the websites you used to research/book your visit. Please type in the five main websites used.

Name of website

Name of website

Name of website

Name of website

Name of website

How satisfied were you with the each of the following aspects of planning your recent trip?

	Very satisfied	Fairly satisfied	Neither satisfied not dissatisfied	Fairly dissatisfied	Very dissatisfied	Don't know /not relevant
Availability of information <u>online</u> to help you plan your trip	◯	◯	◯	◯	◯	◯
Availability of information <u>off-line</u> to help you plan your trip	◯	◯	◯	◯	◯	◯
Getting to {Q1.1}	◯	◯	◯	◯	◯	◯
Availability of convenient air routes to {Q1.1}	◯	◯	◯	◯	◯	◯
Availability of convenient sea routes to {Q1.1}	◯	◯	◯	◯	◯	◯
The cost of travel to {Q1.1}	◯	◯	◯	◯	◯	◯

Please tell us why you were dissatisfied with the availability of information <u>online</u> to help you plan your trip to {Q1.1}

Please tell us why you were dissatisfied with the availability of information <u>off-line</u> to help you plan your trip to {Q1.1}

Please tell us why you were dissatisfied with getting to {Q1.1}

Please tell us why you were dissatisfied with the availability of convenient air routes to {Q1.1}

Please tell us why you were dissatisfied with the availability of convenient sea routes to {Q1.1}

Please tell us why you were dissatisfied with the cost of travel to {Q1.1}

During your recent visit to {Q1.1} which of the following methods did you use to obtain information about places to visit and things to do?

- A smartphone/Internet on a mobile phone
- The VisitScotland Day out app
- A laptop
- An iPad/tablet PC
- Social media (Facebook/Twitter)
- Cafe with Internet access
- Accessed Internet via a terminal in your accommodation or another public area
- Visitor Information Centre
- Visitor Information Point (located in visitor attractions)
- Brochure provided by VisitScotland or Tourist Board
- Tour operator's brochure
- Guide Books (e.g. Fodors, Lonely Planet)
- Locally produced guide books
- Local heritage information (leaflets about the local area, maps, mini guides)
- Asking other travellers
- Asking locals
- Asking proprietors/service staff
- None of the above

During and after your recent trip to {Q1.1} did you do any of the following?

- Uploaded trip photos to the Internet (eg Flickr/Facebook)
- Updated Facebook status about your trip
- Tweeted about your trip
- Blogged about your trip
- None of these

How satisfied were you with the each of the following aspects of your recent trip to {Q1.1}?

	Very satisfied	Fairly satisfied	Neither satisfied not dissatisfied	Fairly dissatisfied	Very dissatisfied	Don't know /not relevant
Availability of mobile phone reception	◯	◯	◯	◯	◯	◯
Availability of WiFi/broadband access	◯	◯	◯	◯	◯	◯

Please tell us why you were dissatisfied with the availability of mobile phone reception in {Q1.1}

Please tell us why you were dissatisfied with the availability of WiFi/broadband access in {Q1.1}

Section Five: Satisfaction with Transport

Which of the following did you use when leaving Orkney at the end of your recent visit?

- Kirkwall airport
- Kirkwall ferry
- Stromness ferry
- St Margaret's Hope ferry
- Burwick ferry
- None of these

Would you recommend {Q5.1} to your family, friends or business colleagues?

- Yes
- No

Please tell us why you would not recommend {Q5.1} and what we can do to improve?

Section Five: Satisfaction with Transport

Which of the following did you use when leaving the Outer Hebrides at the end of your recent visit?

- Stornoway airport
- Benbecula airport
- Barra airport
- Stornoway ferry
- Tarbert ferry
- Lochmaddy ferry
- Lochboisdale ferry
- Castlebay ferry
- None of these

Would you recommend {Q5.4} to your family, friends or business colleagues?

- Yes
- No

Please tell us why you would not recommend {Q5.4} and what we can do to improve?

Section Five: Satisfaction with Transport

Which of the following did you use when leaving Shetland at the end of your recent visit?

- Sumburgh airport
- Holmsgarth (Lerwick) ferry
- None of these

Would you recommend {Q5.7} to your family, friends or business colleagues?

- Yes
- No

Please tell us why you would not recommend {Q5.7} and what we can do to improve?

Section Five: Satisfaction with Transport

How satisfied were you with the following aspects of your transport to and in {Q1.1}?

	Very satisfied	Fairly satisfied	Neither satisfied not dissatisfied	Fairly dissatisfied	Very dissatisfied	Don't know /not relevant
Cost of travel in {Q1.1}						
Value for money of public transport, including local buses and inter-island ferries						
Quality of public transport						
Availability of public transport						

Please tell us why you were dissatisfied with the cost of travel in {Q1.1}

Please tell us why you were dissatisfied with the value for money of public transport in {Q1.1}

Please tell us why you were dissatisfied with the quality of public transport in {Q1.1}

Please tell us why you were dissatisfied with the availability of public transport in {Q1.1}

Section Six: Accommodation

What type of accommodation did you stay in during this recent visit to {Q1.1}. If you stayed in more than one type of accommodation, please select the type that you stayed in for the longest.

- Hotel (5 star/luxury)
- Hotel (4 star)
- Hotel (3 star)
- Hotel (1-2 star)
- Guest house/bed and breakfast
- Self-catering - rented house/cottage/chalet
- Hostel
- Camping Böd
- Static caravan
- Touring caravan pitch at serviced campsite
- Tent at serviced campsite
- Tent (non-campsite)
- Motorhome at serviced campsite
- Motorhome (non-campsite)
- Staying with friends/family
- Second home
- Other

Please type in other accommodation

Thinking about the accommodation you stayed in, how satisfied were you with the following aspects of your accommodation? If you stayed in more than one accommodation, please comment on the one you stayed in longest.

	Very satisfied	Fairly satisfied	Neither satisfied not dissatisfied	Fairly dissatisfied	Very dissatisfied	Don't know /not relevant
Quality of accommodation						
Friendly and efficient service						
Value for money of accommodation						

Please tell us why you were dissatisfied with the quality of accommodation {Q1.1}

Please tell us why you were dissatisfied with the friendly and efficient service {Q1.1}

Please tell us why you were dissatisfied with the value for money of accommodation {Q1.1}

Section Seven: Overall Satisfaction

How satisfied were you with the following aspects of your recent visit?

	Very satisfied	Fairly satisfied	Neither satisfied not dissatisfied	Fairly dissatisfied	Very dissatisfied	Don't know /not relevant
Value for money of dining out	◯	◯	◯	◯	◯	◯
Availability of local produce when dining out	◯	◯	◯	◯	◯	◯
Availability of information locally about places you could visit during your trip	◯	◯	◯	◯	◯	◯
Quality of visitor attractions, historic sites, museums, visitor centres, etc	◯	◯	◯	◯	◯	◯
Value for money of visitor attractions, historic sites, museums, visitor centres, etc	◯	◯	◯	◯	◯	◯
Opportunities to attend local events/festivals	◯	◯	◯	◯	◯	◯
Quality of local arts and crafts products	◯	◯	◯	◯	◯	◯
Value for money of local arts and crafts products	◯	◯	◯	◯	◯	◯
Quality of local food and drink products	◯	◯	◯	◯	◯	◯
Signposting	◯	◯	◯	◯	◯	◯

Please tell us why you were dissatisfied with the value for money of dining out in {Q1.1}

Please tell us why you were dissatisfied with the availability of local produce when dining out in {Q1.1}

Please tell us why you were dissatisfied with the availability of information locally about places you could visit during your trip to {Q1.1}

Please tell us why you were dissatisfied with the quality of visitor attractions, historic sites, museums, visitor centres in {Q1.1}

Please tell us why you were dissatisfied with the value for money of visitor attractions, historic sites, museums, visitor centres in {Q1.1}

Please tell us why you were dissatisfied with the opportunities to attend local events/festivals in {Q1.1}

Please tell us why you were dissatisfied with the quality of local arts and crafts products in {Q1.1}

Please tell us why you were dissatisfied with the value for money of local arts and crafts products in {Q1.1}

Please tell us why you were dissatisfied with the quality of local food and drink products in {Q1.1}

Please tell us why you were dissatisfied with signposting in {Q1.1}

How likely are you to visit {Q1.1} in the next five years for a leisure holiday or short break?

- ◯ Very likely
- ◯ Fairly likely
- ◯ Neither likely nor unlikely
- ◯ Fairly unlikely
- ◯ Very unlikely

What could {Q1.1} tourism industry do to improve your visitor experience or encourage you to visit again?

Was there any activity you felt was not provided for adequately on {Q1.1} or not provided at all?

Overall, has your recent visit to {Q1.1} met, exceeded or failed to meet your expectations?

- Exceeded expectations
- Met expectations
- Did not meet expectations
- Not sure/can't say

Would you recommend {Q1.1} as a holiday destination?

- Yes
- No
- Don't know

What was the highlight of your recent visit to {Q1.1} or the single thing thing that you enjoyed or appreciated most?

Section Eight: Please tell us about you

What gender are you?

- Male
- Female

Which of the following age groups are you in?

- 16-24
- 25-34
- 35-44
- 45-54
- 55-64
- Over 65
- Prefer not to say

Where do you normally live?

- Scotland
- England
- Wales
- Northern Ireland
- Other UK
- Republic of Ireland
- Norway
- France
- Germany
- Italy
- Spain
- Netherlands
- Other Europe
- USA
- Canada
- Australia
- New Zealand
- Other country

Please type in other European country

Please type in other country

Section Nine: Details of Group/Party

Which of these best describes who was with you on your trip to {Q1.1}?

- Travelling alone
- Partner/spouse
- With child/children
- With parents or partner's parents
- Other members of family
- Friends
- With organised group/tour
- Business/work colleagues
- Someone else

Who else is with you on your trip?

How many people, including yourself, were in your immediate group or party visiting {Q1.1}?

If you would like to be entered in the prize draw for an iPad, please confirm your email address. Your email will only be used for the purposes of the prize draw and not for any other purpose.

Thank you for completing the questionnaire. Please now press submit to ensure we receive your response.

APPENDIX 3: FACE-TO-FACE CALIBRATION SURVEY QUESTIONNAIRE

ISLANDS CALIBRATION SURVEY – The OUTER HEBRIDES

Interviewer name (print): ________________________ Signature ________________________ Date ________________________ (one sheet per date)

A. Day of the week (print): ________________________ B. Interview location: Airports – **Stornoway / Benbecula / Barra** (circle location)
Ferries – **Stornoway / Tarbert / Lochmaddy / Lochboisdale / Castlebay**

Good morning/afternoon/evening, my name is .... from the independent research agency, Scotinform Ltd. We are carrying out an audit of visitors as they leave the Outer Hebrides on behalf of the Scottish national tourism organisation, VisitScotland, Highlands and Island Enterprise and the Western Isles Council. **ENSURE RESPONDENT IS DEPARTING TO A RELEVANT DESTINATION (See note below)**

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

WRITE IN NUMBER, INCLUDING RESPONDENT	a.	b.	c.	d.	e.	f.	g.	h.	i.	j.	k.	l.	m.	n.	o.

2 Where do you normally live?
ONE ANSWER ONLY

	a.	b.	c.	d.	e.	f.	g.	h.	i.	j.	k.	l.	m.	n.	o.	
The Outer Hebrides...........................	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	**CLOSE**
Scotland……………………………………	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	**ASK Q3**
Other UK - Eng/Wal/NI………………..	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	**ASK Q3**
Overseas………………………………	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	**ASK Q3**

3 Which of these best describes your current visit to the Outer Hebrides?
ONE ANSWER ONLY

	a.	b.	c.	d.	e.	f.	g.	h.	i.	j.	k.	l.	m.	n.	o.
On holiday/leisure trip – overnight…	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
On holiday/leisure trip – day trip……	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
P Visiting friends/relatives – overnight	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Visiting friends/relatives – day trip…	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
On business trip – overnight…………	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
On business trip – day trip……………	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
No-in transit, not visiting O Hebrides..	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7

THANK RESPONDENT

For information only.
RELEVANT DEPARTURE DESTINATIONS: **Ferry**: Ullapool, Uig, Oban. **Flight**: Inverness, Aberdeen, Glasgow, Edinburgh.