



Comhairle nan Eilean Siar



VisitScotland | Alba™

Using & Interpreting the Islands Visitor Survey 2017

Please use the following as guidance notes when interpreting the Islands Visitor Survey:

- ✚ **The Islands Visitor Survey 2017** was commissioned by Orkney Islands Council, Shetland Islands Council, Comhairle nan Eilean Siar, and VisitScotland. The main aim of the survey was to gather views on a wide range of topics relating to the visitor profile and experience. In addition, due to the 'defined' entry/exit points for each island, it was seen to be appropriate to also gather information to estimate the volume and value of visitors to each island at a robust level. These research results will inform on-going tourism policies at a local and national level.
- ✚ The research included trips for the purpose of **holiday/leisure, visiting friends and family (VFR) and business**. Day and overnight trips were included. Cruise liner visitors were not included.
- ✚ The research for the Islands Visitor Survey was conducted between January and December 2017. The project involved 3 separate components:
 - **A face to face calibration survey** collected data on all passengers (both visitors and residents) on 3 key areas: group size, normal place of residence, and type of visit. The data was combined with passenger volumes supplied by local transport operators to estimate the visitor numbers and value of visits.
 - **A post visit online survey** was emailed to calibration respondents (who had provided an email address) to gain in-depth insight into their visit. The survey allowed respondents to reflect on their whole visit.
 - A small number of **qualitative depth interviews** for each of the islands groups.
- ✚ The volume and value estimates included within the Islands Visitor Survey are for the 2017 calendar year (period of fieldwork January-December 2017).
- ✚ The above approach (covering visitor experience and volume and value statistics) contrasts to the **Scotland Visitor Survey 2015-16** which focused purely on the visitor experience of the overnight leisure visitor and was not a study able to cover the volume and value of visitors

into the country. Data on tourism in Scotland is gathered by the annual statutory statistical surveys undertaken at a national level (The Great Britain Tourism Survey, which provides volume and value estimates of domestic tourism from within Scotland and the rest of Great Britain and The Office of National Statistics' International Passenger Survey, which provides details of tourism from abroad). Details of the survey methodologies can be found below:-

- **Great Britain Tourism Survey (GBTS)** - The GBTS survey is conducted continuously throughout the year, using face-to-face Computer Assisted Personal Interviews or CAPI interviewing, as part of TNS's in-home omnibus surveys. Weekly omnibus surveys are conducted with a representative sample of 2,000 adults aged 16 and over within Great Britain. Respondents are asked whether they have taken trips in Britain in the previous four calendar weeks that involved at least one night away from home. The results are reported in terms of total GB population values. Therefore the data are weighted to correct for differences between the sample distribution and that of the population and also to gross the sample values up to the total population. On average 2,000 interviews are conducted each week, some 100,000 interviews per year.
www.visitscotland.org/research_and_statistics/tourismstatistics/national_statistics/uk_statistics.aspx
- **The International Passenger Survey (IPS)** is a continuous survey carried out by the Office for National Statistics (ONS). It began in 1961 and now covers all major air, sea and tunnel ports, providing detailed information on the numbers and types of visits made by people travelling to and from the UK. Anonymous face-to-face interviews are undertaken with a random sample of passengers as they enter or leave the UK. Approximately 95 per cent of passengers entering and leaving the UK have a chance of being sampled on the survey.
Further methodology information
www.visitbritain.org/Images/IPS%20methodology%20for%20web%20Sept%202012_tcm29-34924.pdf

✚ The International Passenger Survey no longer provides statistics at an island local authority level but only at a Highlands & Islands regional level. However, the Great Britain Tourism Survey (GBTS) is available at a local authority level for domestic GB tourism. VisitScotland no longer includes volume and value information in its regional factsheets for the islands but these can be found in **The GB Tourism Report** published by TNS. This includes domestic data for Orkney, Outer Hebrides and Shetland.

✚ Please note, the volume and value estimates derived from the Islands Visitor Survey are not directly comparable to the statistics derived from the GBTS due to the different methodologies used.

✚ Further details from the Islands Visitor Survey 2017 (including reports and executive summaries) are available separately on www.visitscotland.org.

- ✚ Further details on the annual statistical surveys are available separately on www.visitscotland.org
- ✚ The Islands Visitor Survey was conducted by Progressive and MKA Economics on behalf of a number of partners working in collaboration.



Comhairle nan Eilean Siar



VisitScotland, Ocean Point One, 94 Ocean Drive, Edinburgh, EJ6 6JH
Tel: 0131472 2222 email: research@visitscotland.com www.visitscotland.org

Disclaimer: VisitScotland has published this report in good faith to update stakeholders on its activity. VisitScotland has taken all reasonable steps to confirm the information contained in the publication is correct. However, VisitScotland does not warrant or assume any legal liability for the accuracy of any information disclosed and accepts no responsibility for any errors or omissions.

Information published May 2018