Analysis Report 2 (of 3)

Highland Transient Visitor Levy
Face-to-face Visitor Survey Analysis

Summary of the response to The Highland Council's face-to-face visitor survey on a potential Highland Transient Visitor Levy

December 2019

Introduction

In July 2019 the Highland Council commissioned the *Moffat Centre for Travel and Tourism Business Development*, part of Glasgow Caledonian University, to undertake a face-to-face visitor consultation on a potential Highland Transient Visitor Levy (TVL).

A team of trained interviewers carried out 950 face-to-face interviews between mid-August and the end of September 2019 using a questionnaire co-designed by Highland Council and the Moffat Centre.

Interviews took place at eight locations across Highland, selected to ensure good geographical spread across the region and also to include a combination of sites in larger communities, smaller communities and more rural locations.

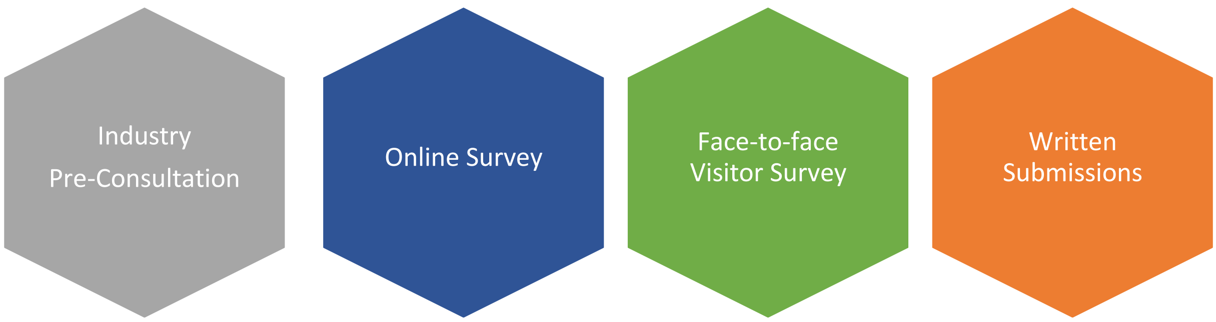
Location	Number of interviews	%
Fort William	213	22%
Inverness	181	19%
Ullapool	172	18%
Portree	148	16%
Aviemore	94	10%
Dornoch	56	6%
Dunnet Head	55	6%
Nairn	31	3%
Total	950	100%

Table 1: Location and number of visitor interviews

Numbers of respondents at each site were influenced by several external factors including available visitors on the day and weather.

In context

This Face-to-face Visitor Survey is one of a number of pieces of evidence gathered by the Highland Council to investigate a potential Highland Transient Visitor Levy. The results should be considered alongside the results of the Pre-Consultation, Online Survey and Written Submissions.



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Section 1: Respondent characteristics

A total of 950 visitors participated in face-to-face visitor surveys conducted by the Moffat Centre.

The first section of the questionnaire focused on collecting information about the respondent and their current visit to Highland.

The aim was to better understand the sample population and determine its representativeness of the Highland tourism market, particularly to understand whether results are disproportionately skewed by certain markets/ profiles. The intention was not to develop conclusions about the composition of visitors to Highland.

1.1 Visitor residence

Overall, 42.9% of respondents were domestic visitors (from the UK), with 2.9% from Highland, 12.9% from the rest of Scotland, and 27.1% from the rest of the UK.

Over half (57.1%) of respondents were international visitors, with almost a third (30.8%) of all respondents coming from Europe and around a quarter (26.2%) coming from the rest of the world.

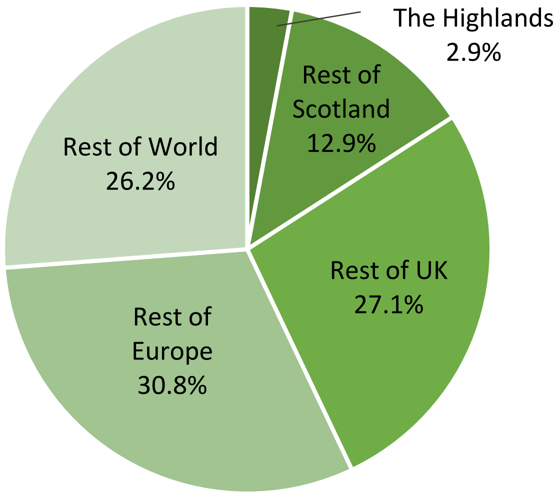

Figure 1 – Residence of visitors

Source: *Question 1.1. Where do you live? (Usual place of residence) (n=950)*

How does this sample compare to visitors to Highland as a whole?

Around a fifth of all visitors to Highland (~18%) are international visitors. At 57.1%, this Consultation has a significantly greater proportion of international visitors than the Highland visitor market as a whole. Where possible, this should be considered in analysis, and in the Council Report.

The roughly equal split of domestic visitors between those form Scotland and those from the UK does reflect the Highland visitor market.

1.2 Visitor purpose

The majority of respondents (97.1%) indicated that their visit was for leisure purposes. Just 2.9% answered that they were visiting Highland for business.

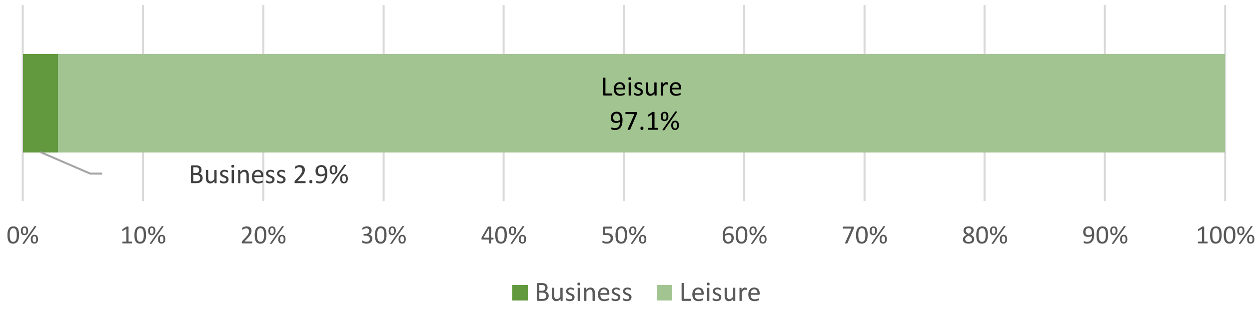

Figure 2 – Visitor purpose
Source: *Question 1.2. Is your visit for Leisure or Business? (n=950)*

How does this sample compare to visitors to Highland as a whole?

Business travellers account for about 10% of all domestic visitors to Highland and about 3% of all international visits. At just 2.9%, this Visitor Consultation under-represents business travellers.

1.3 Visitor accommodation

The 151 visitors that advised they lived in Scotland (either 'The Highlands' or the 'Rest of Scotland') in Question 1 were asked whether they were staying at home.

These visitors were evenly split, with half (50.0%) advising they were staying at home, and half (50.0%) advising they were staying in accommodation in Highland.

All visitors not staying at home were asked which accommodation types they were using during their trip. Respondents were able to select more than one answer.

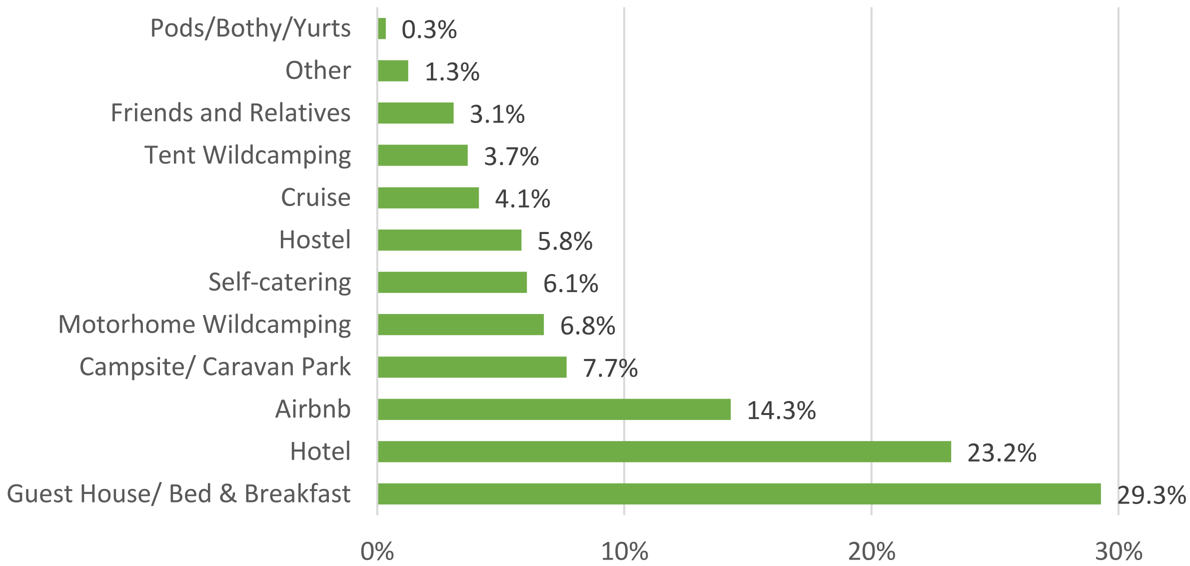

Figure 3 – Visitor accommodation types
Source: *Question 1.3. During your trip, what type of accommodation are you staying in? (n=874)*

The most common response was staying in a Guest House or B&B, with around one in three respondents (29.3%) selecting this option. Almost a quarter of respondents (23.2%) were staying in a hotel, making it the second most common response. Third was Airbnb with 14.3% using this service.

Overall, the most common accommodation type was Serviced Accommodation with 58.4% of respondents using either a Guest House/ B&B, Hotel and/or Hostel during their stay.

Around 1 in 10 respondents (10.4%) was wild-camping at some point during their trip, either in a motorhome (6.8%) or tent (3.7%).

Cruise visitors accounted for 4.1% of respondents, and 3.1% of respondents were staying with friends of relatives.

1.4 Visitor stay duration

Three quarters (75.0%) of respondents were staying in Highland for three days or more. The most common length of stay in Highland amongst respondents was more than 7 days, with almost a third (31.6%) selecting this option.

Just over 1 in 10 (12.0%) of respondents were day visitors.

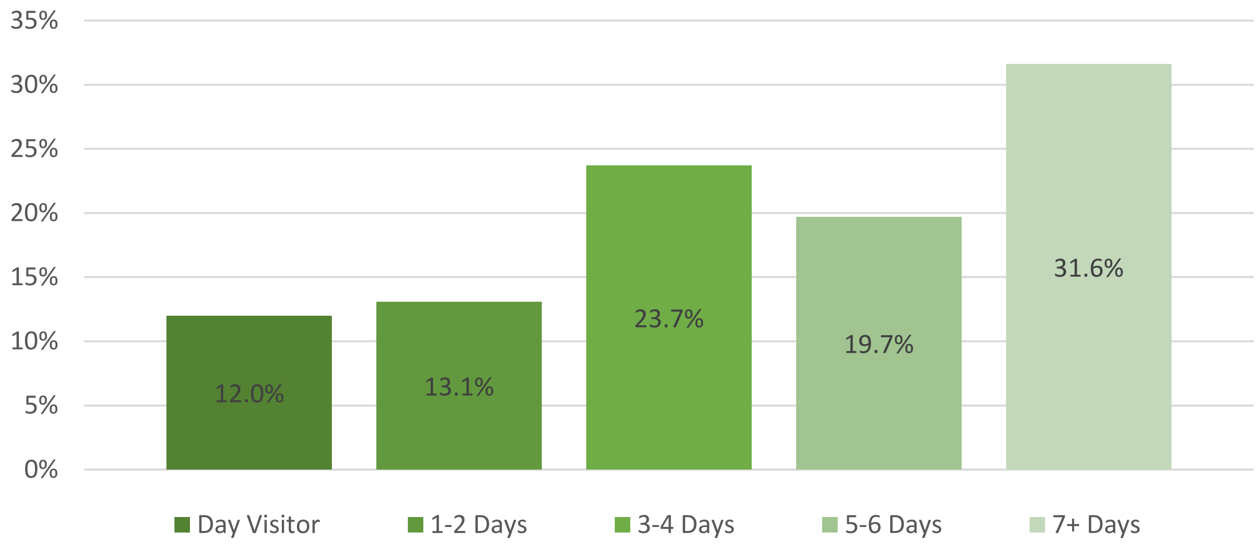

Figure 4 – Visitor stay duration

Source: *Question 1.4. How many nights are you staying in the Highlands? (n=950)*

How does this sample compare to visitors to Highland as a whole?
Day visitors account for about a third of all visitors to Highland. At 12.0%, this Visitor Consultation under-represents the views of day visitors. On average, visitors surveyed were staying longer in Highland than the average visitor stay in Highland (3.1 nights) Highland visitor market as a whole.

Section 2: Visitor satisfaction with services

The Council also took the opportunity, whilst undertaking face-to-face interviews with visitors, to ask about the levels of visitor satisfaction in key services and facilities.

Respondents only provided their views on the services they had experienced during their visit. As a result, sample size varies for each service. The lowest response was for 'Motorhome facilities' (n=136), with all other response rates 674 or higher.

In general, visitors reported being satisfied with the services they had used. For all services in question, with the exception motorhome facilities, 60% or more of respondents were 'very satisfied' or 'satisfied'.

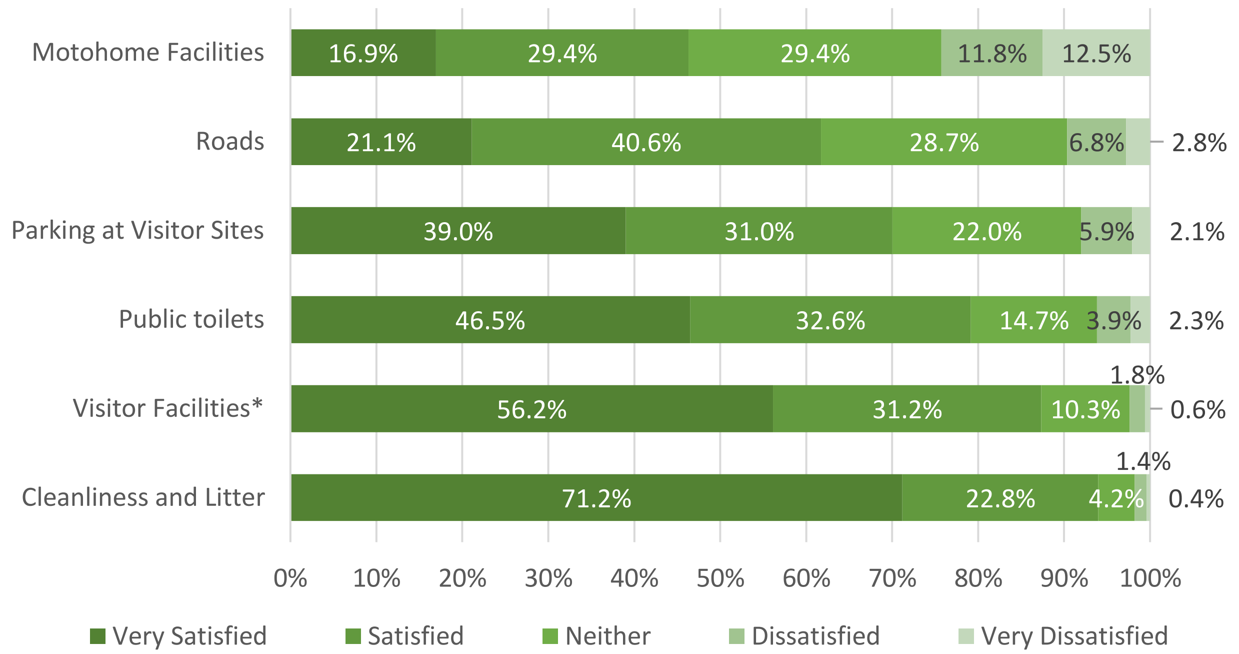

Figure 5 – Visitor satisfaction with tourism services
Source: *Question 1.5. How satisfied are you with the following services? (n= 136-944)*
**Visitor Facilities such as paths, trails and viewpoints.*

Satisfaction was highest with 'Cleanliness and Litter' (94.0% 'very satisfied' or 'satisfied'), followed by 'Visitor facilities such as paths, trails and viewpoints' (87.3% 'very satisfied' or 'satisfied'), and then Public toilets (79.1% 'very satisfied' or 'satisfied').

Satisfaction amongst 'Parking at Visitor Sites' and 'Roads' were also high with 70.0% and 61.7% 'very satisfied' or 'satisfied', respectively.

Levels of dissatisfaction in all these services were also low. For all tourism services in question, with the exception motorhome facilities, less than 10% of respondents were 'very dissatisfied' or 'dissatisfied'.

Satisfaction levels in motorhome facilities were more mixed with 46.3% of users either 'very satisfied' or 'satisfied' and almost a quarter (24.3%) either 'very dissatisfied' or 'dissatisfied'.

Section 3: Investing TVL revenue

Participants were asked to select all the options they felt to be a justifiable use of revenue generated through a Highland Transient Visitor Levy, were it introduced.

3.1 'Tourism uses' of TVL revenue

For six of the options given, the majority of respondents (50.0% or more) advised that, were revenue raised from implementing a TVL, they would support it going towards this.

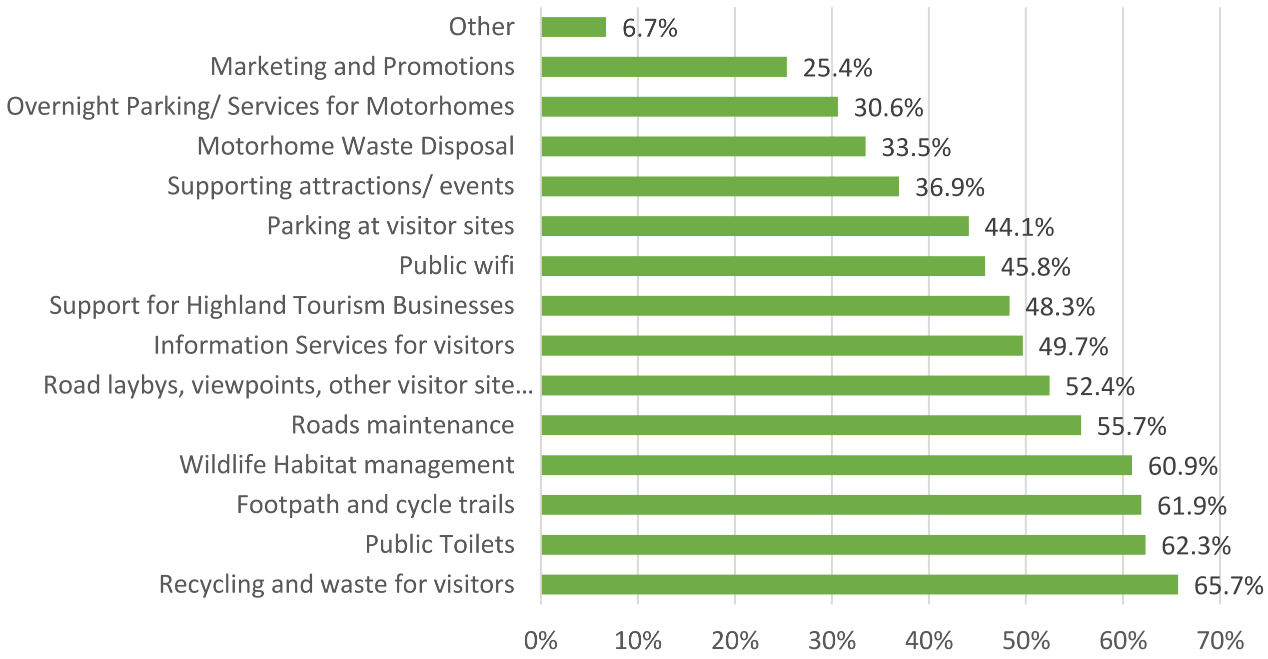

Figure 6 – Use of revenue from a Highland TVL
Source: *Question 2.1. What do you consider to be a justifiable use of a local tourism tax? (n =950)*

The most common response was 'Recycling and waste for visitors' with around two-thirds of respondents (65.7%) selecting this option. This was followed by 'Public toilets' (62.3%), 'Footpath and cycle trails' (61.9%), 'Wildlife habitat management' (60.9%), 'Roads maintenance' (55.7%) and 'Road laybys, viewpoints, other visitor site improvements' (52.4%).

Just under half of the respondents selected 'Information services for visitors (49.7%) and support for Highland tourism businesses (48.3%).

The lowest level of support for spending was on 'Marketing and promotions' with just a quarter of respondents (25.4%) selecting this option. Both 'Motorhome waste disposal' (33.5%) and 'Overnight parking/ services for motorhomes' (31.6%) were selected by almost a third of respondents.

Of the 6.7% of 'Other' responses, suggested uses included: public transport, live music, historic sites, picnic tables, improving access for all, and for use by local communities.

Section 4: Support or opposition to a Highland TVL?

4.1 Support or opposition

Having considered potential uses of revenue raised through a Highland Transient Visitor Levy, respondents were asked whether they would be willing to contribute to such a scheme, were it introduced.

The majority (78.4%) responded 'Yes', they would be willing to contribute to a Highland TVL scheme.

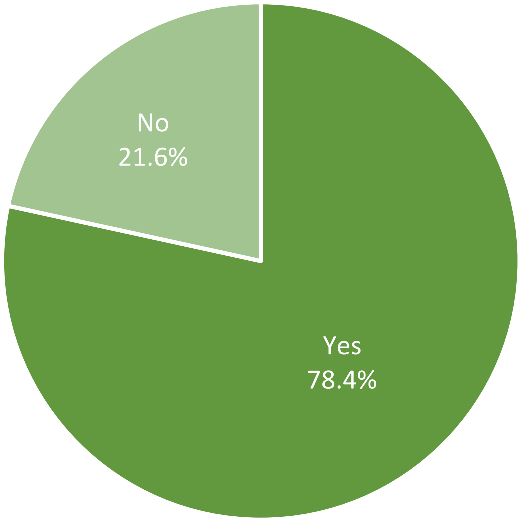

Figure 7 – Support and opposition to a Highland TVL
Source: *Question 2.2. Given the potential uses, would you be willing to contribute to a local visitor tax? (n =950)*

4.1.2 Variations on support/ opposition: Visitor residence

Visitors from out with the UK were most likely to indicate they would be willing to contribute to a Highland TVL scheme, with almost 9 in 10 international visitor respondents advising this: 86.7% of respondents from Europe (out with the UK) and 86.3% from the rest of the world.

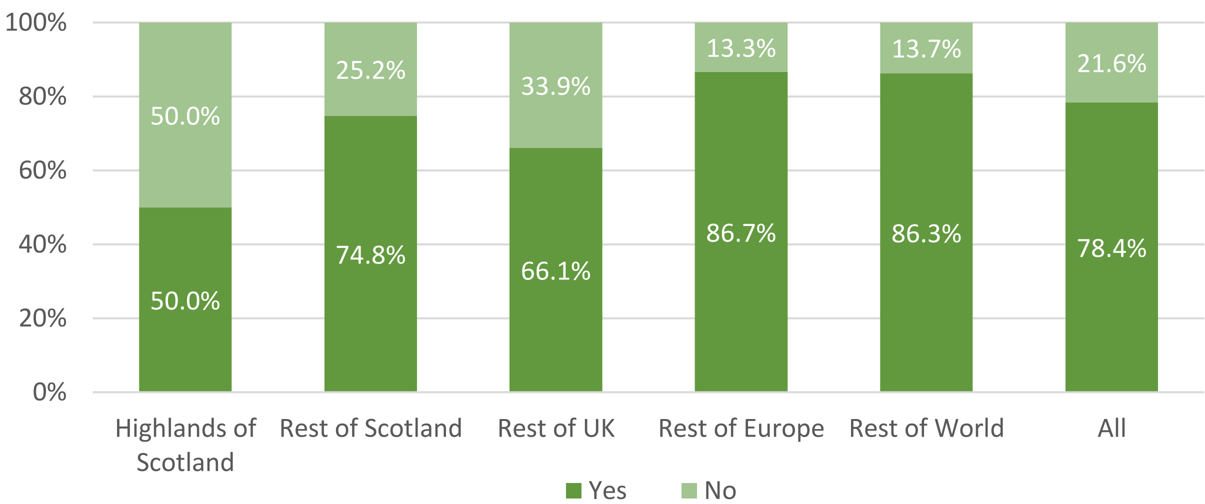

Figure 8 – Support and opposition to a Highland TVL, by visitor residence
Source: *Question 2.3. Given the potential uses, would you be willing to contribute to a local visitor tax? (n =950)*

Visitors from Highland were more mixed in their response with 50.0% answering 'Yes' and 50.0% answering 'No'. This was the group least likely to indicate willingness to contribute to a Highland TVL.

A higher proportion of domestic visitors out with Highland indicated willingness to contribute to a scheme with three-quarters (74.8%) of respondents from the 'Rest of Scotland' and two-thirds of respondents (66.1%) from the 'Rest of the UK' responding 'Yes'.

4.1.3 Additional comments: support or opposition

The 21.6% of respondents that indicated they would not be willing to contribute to a Highland TVL, were given the opportunity to explain why, if they wished. Responses have been categorised by the Moffat Centre, the company contracted to undertake the survey.

Responses were varied in detail, with no one specific reason being given by more than about a fifth of responses.

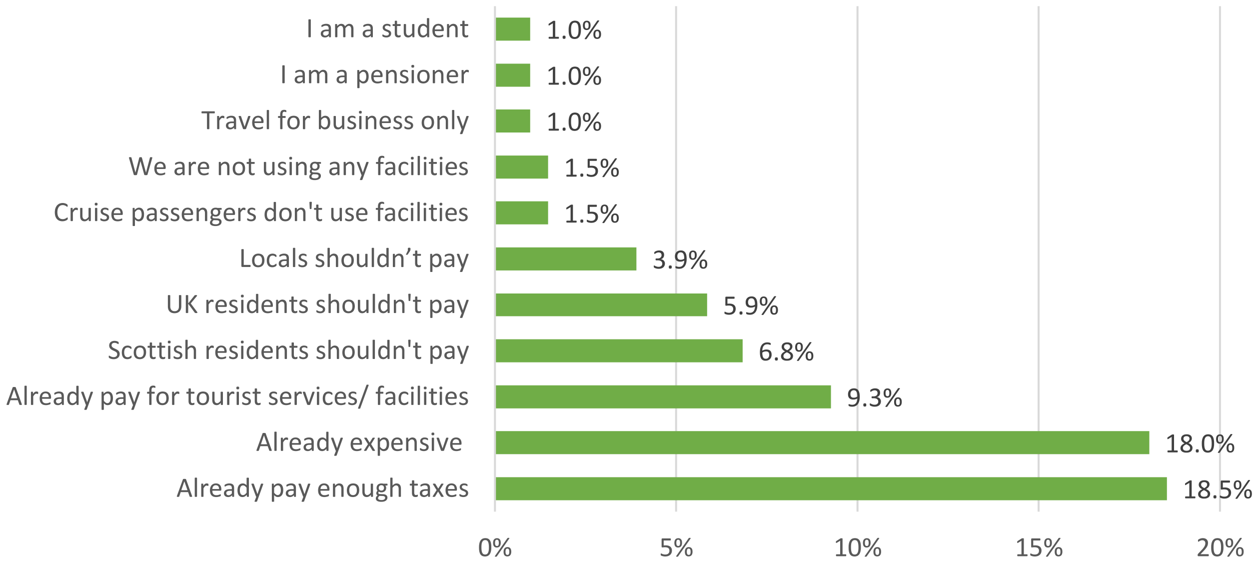

Figure 9 – Reasons for not supporting a Highland TVL
Source: *Question 2.3. If No [to Question 2.2], please explain your reasons (n=205)*

About a quarter of responses (27.8%) were based on the fact respondents felt they were already contributing sufficiently through taxation (18.5%) or paying for services (9.3%).

Almost 1 in 5 respondents (18.0%) answered that a Highland TVL should not be introduced as Highland is already expensive to visit.

Around a fifth of responses (21.0%) were characterised by feeling that there should be exemptions or concessions for certain groups, namely Scottish residents (6.8%), UK residents (5.9%), 'Locals' (3.9%), Cruise passengers (1.5%), Business travel (1.0%), Pensioners (1.0%) and Students (1.0%).

A small proportion of respondents (1.5%) advised they were unwilling to pay as they were not using any facilities.

Section 5: Designing a Highland TVL

The 78.4% of respondents that indicated willingness to contribute to a Highland TVL (Question 2.2) were asked a series of questions on what they felt an optimal Highland TVL scheme might look like.

5.1 Rate of levy

The majority (60.0%) of respondents chose the option of between £1 and £1.99. Second most common was 'Less than £1' with almost a quarter (22.8%) of respondents selecting this option.

Just 17.2% indicated support for charge of £2 or more, with 15.4% selecting £2 to £5, and 1.7% for more than £5.

There was greatest support for a modest levy rate, with 82.8% selecting a rate of less than £2.

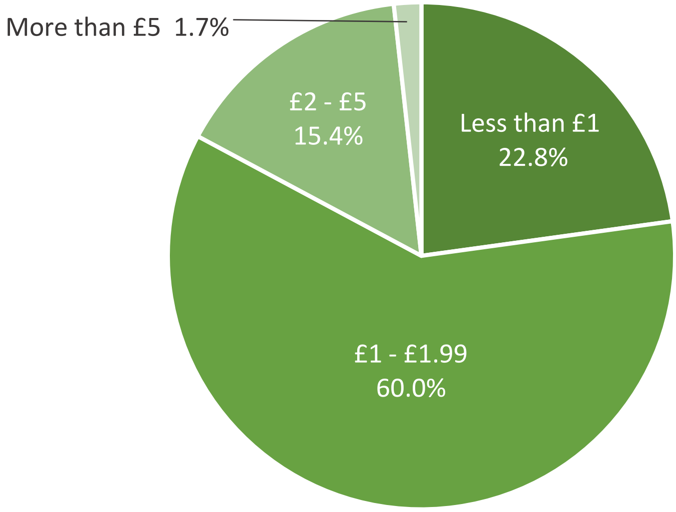

Figure 10 – Levy rates for a Highland TVL

Source: *Question 2.4. If Yes, how much would you consider paying per day/ night for such a levy? (n=745)*

5.1.1 Variations on levy rate: visitor residence

There was a geography to the responses to this question. The closer the visitor residence to Highland, the more divided the opinion on the levy rate and the more likely visitors were to select either the highest and the lowest options.

Whereas over 7 in 10 visitors (72.1%) from the Rest of World selected a rate of £1-£1.99, less than 3 in 10 (28.6%) of Highland visitors selected this option.

Visitors from Highland were highly divided in their views on a potential levy rate with just over a third selecting the lowest option of 'Less than £1' (35.7%) and the same proportion of respondents selecting the highest option of 'More than £5' (35.7%). No Highland respondents selected the '£2 - £5' option.

Visitors from every other region were significantly less likely to select the 'More than £5' option – ranging from 0.8% to 1.8%.

The single most popular choice for all visitor groups, with the exception of those from Highland, was the £1-£1.99 rate. This option was selected by the majority of respondents from the UK (54.1%), Europe (61.0%) and the world (72.1%).

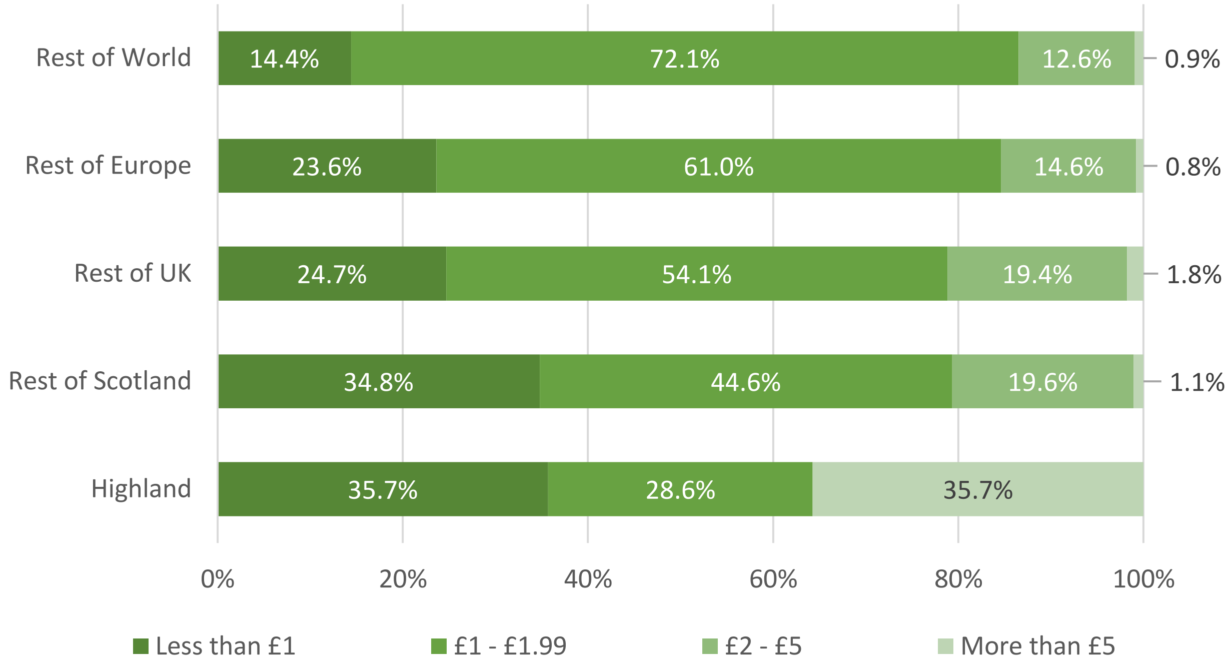

Figure 11 – Levy rates for a Highland TVL, by visitor residence
Source: *Question 2.4. If Yes, how much would you consider paying per day/ night for such a levy? (n=745)*

5.2 Which visitors should contribute to a Highland TVL?

Respondents were asked which types of visitor they felt a Highland TVL should be applied to. They were able to select as many options from a list as they felt were applicable, and to suggest others.

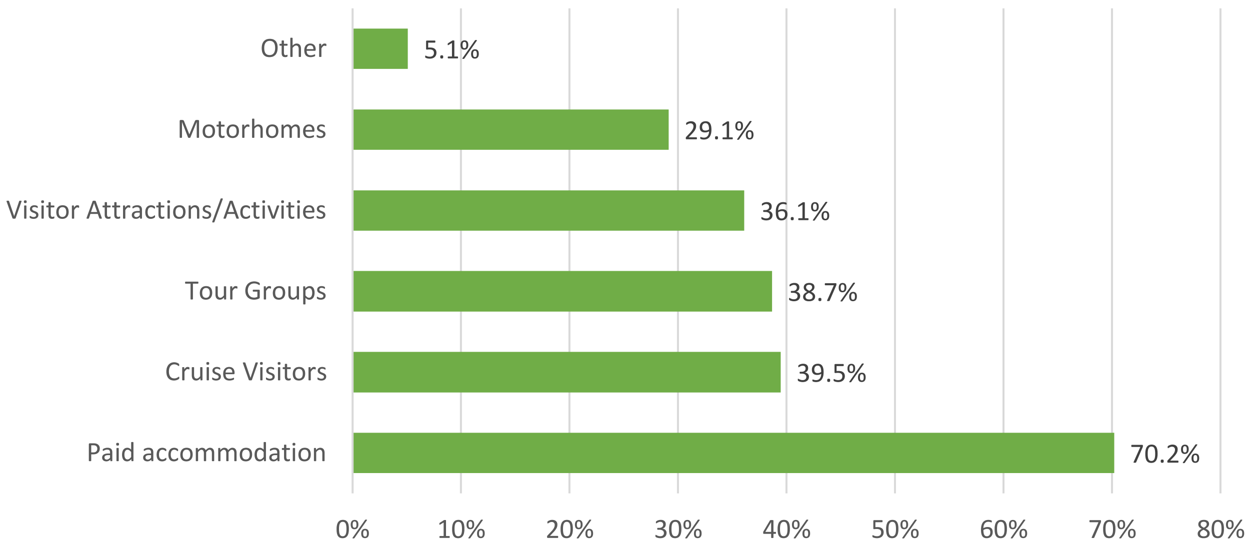

Figure 12 – Levying visitor types
Source: *Question 2.5. If Yes, where should the local tourism tax be applied? (n=745)*

The 'Accommodation' option was selected by the majority (70.0%) of respondents. This was the most common response by some margin and the only majority response.

Four of the other options received between 30% and 40% of responses: ‘Cruise Visitors’ (39.5%), ‘Tour Groups’ (38.7%), ‘Visitor Attractions/Activities’ and ‘Motorhome users’ (30.0%).

In total, 38 respondents (5.1%) responded ‘Other’, with responses including: food outlets/ restaurants, applied to all categories listed, campsites, and at regional airports.

Section 6: Potential impact of a Highland TVL on visitor behaviour

6.1 Would a levy impact visitors’ decision to visit Highland?

All respondents were asked whether introducing a Highland TVL would affect their decision to visit the Highlands in the future. The majority (83.7%) of respondents indicated that ‘No’, a TVL scheme would not influence their decision to visit Highland.

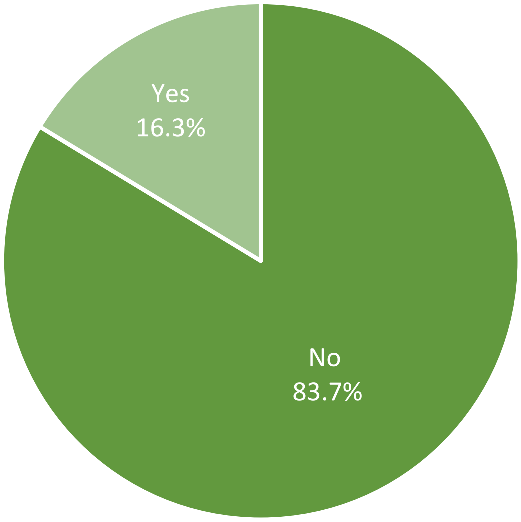

Figure 13 – Whether a Highland TVL would influence visitors’ future behaviour
Source: *Question 2.6: Would a Transient Visitor Levy influence your decision to visit the Highlands of Scotland in the future? (n=950)*

6.1.1 Variations: visitor residence

The responses to this question varied with visitors’ place of residence.

Visitors from the ‘Rest of the UK’ and ‘Highland’ were most likely to be influenced to visit Highland by the introduction of a Highland TVL with around a quarter responding yes (25.7% and 25.0%, respectively).

International visitors from the ‘Rest of Europe’ and the ‘Rest of the World’ were less likely to be influenced by the introduction of a Highland TVL (12.6% and 12.9% indicating ‘Yes’, respectively).

Visitors from the ‘Rest of Scotland’ were least likely to be influenced by the by the introduction of a Highland TVL with 1 in 10 respondents (10.6%) responding ‘Yes’.

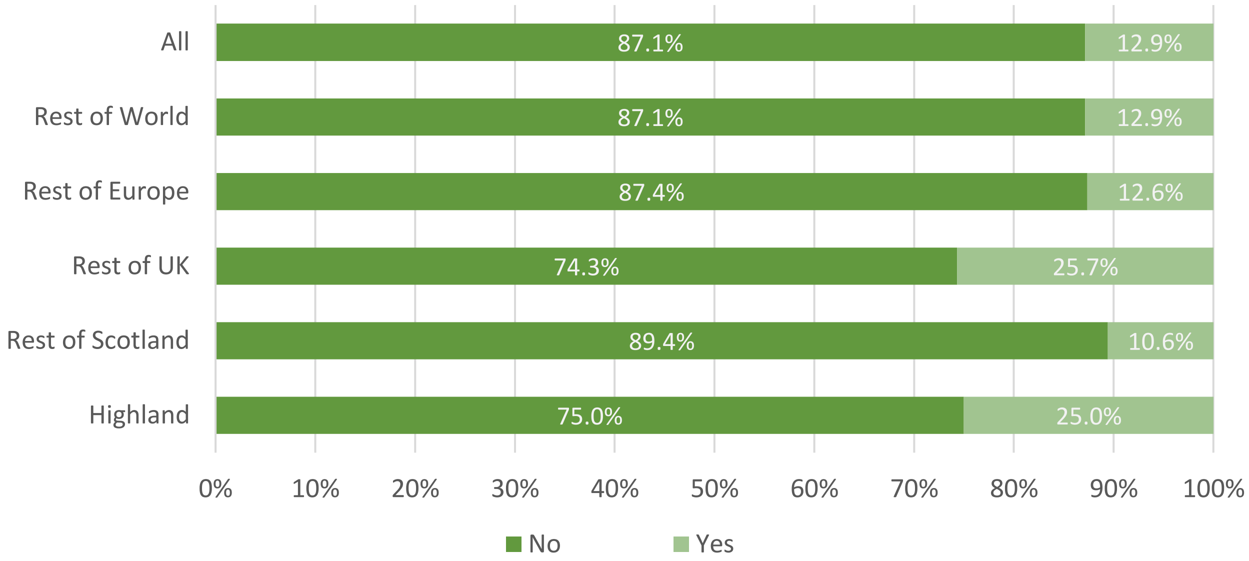

Figure 14 – Whether a Highland TVL would influence visitors' future behaviour, by visitor residence
Source: *Question 2.6: Would a Transient Visitor Levy influence your decision to visit the Highlands of Scotland in the future? (n=950)*

6.2 How might a Highland TVL influence visitor behaviour?

The final question was posed to respondents that indicated a Highland TVL would influence their decision to visit Highland (Question 2.6). Respondents were asked to select all relevant options.

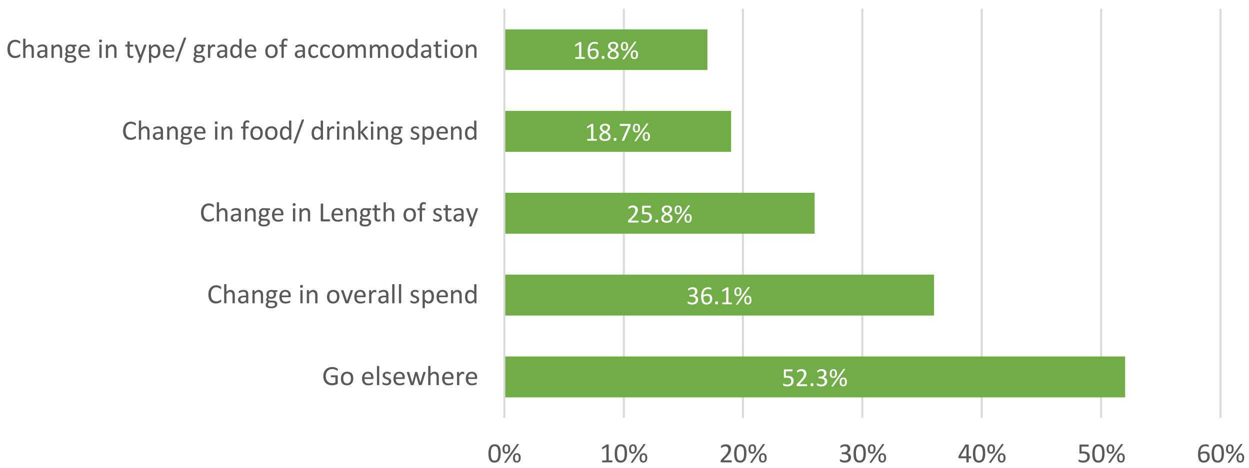

Figure 15 – How a Highland TVL would influence visitors' future behaviour
Source: *Question 2.7: If Yes, how would this impact on your decision to visit in the future? (n=155)*

Half of the respondents to this question (52.3%) selected 'Go elsewhere'. This represents 8.5% of all respondents.

All other responses related to a change in behaviour whilst still visiting. Around a third of (36.1%) were for changing their overall spend and around a quarter (25.8%) advised they would change the length of stay. Almost a fifth (18.7%) advised they would change their food or drink spending, and 16.8% selected that it would change their type/ grade of accommodation.

– ANALYSIS ENDS –