Coigach & Assynt Living Landscape

Market Research Report on Visitor Information for Coigach & Assynt Living Landscape Partnership (CALLP) Scheme

18 October 2018

Prepared By
Lindsey Kelly
Market Sphere
Rosemount
Munlochy
IV8 8PF

Executive Summary

The understanding of increased technology as an important tool for visitors is recognised by Coigach & Assynt Living Landscape (CALL) and the research was undertaken to support the appropriate development of an app or other mobile technology.

The response rate for the consumer survey was exceptionally high with 417 completed surveys, covering a small number of locals, day visitors and longer-term tourists from the UK and around the globe.

The research provides details on the accommodation booked, the length of stay, and activities that the visitors are interested in. This provides background details to the important criteria regarding research of the destination, usage of online sources, and relevance of apps as a future tool for the area.

Three points particularly noteworthy are that the long-term use of printed maps and leaflets is not likely to diminish regardless of other sources. The use of standard apps and websites remains high. The interest in QR codes, downloadable MP3s and PDFs is limited and as a potential revenue source would be small.

Not surprisingly, the social media apps proved the most popular to be accessed throughout the holiday. This with periodic connection would require content to be easily downloaded and potentially accessed through Social Media sites – Facebook and WhatsApp are the main two to develop in the first instance, based on the survey responses.

The primary research carried out reflects many of the figures and findings from other tourism-based research and the wider understanding and use of apps by consumers.

Recommendations

1. Overall the responses from visitors suggests that a single interest app will not reach the intended targets at the rate required and the ability to monetarise to continue development will be lower than required.
2. The ongoing need for printed maps and leaflets is not displaced by the use of an app but is seen as complementary, particularly when visiting the area.
3. Developing content for the CALL website or a new area mobile website that combines many of the other standalone area sites is important, with investment in strong Search Engine Optimisation (SEO) vital. Clear links to all tourism businesses within the area is also required. A hybrid app can then be created on the back of this strong mobile web, which would provide the best of both opportunities.
4. Access to the information through already established and recognised websites, such as TripAdvisor, Booking.com, Hotels.com etc. as well as apps, will allow content to be developed that can be purchased through their apps, which would be a more appropriate route to market.

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Introduction and Methodology

Introduction

Market Sphere is a small independent consultant offering research and marketing advice for SMEs and Social Enterprises. The research report was commissioned by Coigach & Assynt Living Landscape to assess the viability of developing a tourist-based app, promoting the area and in particular walking/trail Maps and possible MP3 downloads.

The initial desk research identified several potential sources of information and details appropriate to visitors, while also recognised the increasing need for apps to meet the mobile demands of tourists.

The survey was designed and tested with input from CALL and its partner organisations, ensuring important core data was collected in relation to the access information. A prize as an incentive was offered with just over 50% submitting their email for the draw

The objective is to ask visitors and locals what sort of information they are looking for and how they wish to access it, and if people would want an app.

The brief stated the objectives of the report as:

- Assessment of the information visitors look for
- How they presently access the information
- Opportunities/likelihood of alternate access styles in the future

The brief also identified issues to be addressed including:

- Understanding of the apps they presently use to find information
- Understanding of website and information points used pre-visit
- Number of apps covering tourism and the area

Providing recommendations on:

- Potentials for a CALL app.
- Alternate methods for developing and sharing content
- Alternative route to monetarisation.

Methodology

This section highlights the collection strategies used to gather our research information including:

Desk Research

This covered investigation of published reports on the Mobile App market covering trends, developments and opportunities. An overview of potential competitor's apps that cover the area and offer similar information to the proposed app. An assessment of the impact of technology on tourism and travel from established research and reports.

Survey Methodology

One survey form was created to allow for locals and visitors to share their thoughts and details regarding the usage of apps and potential areas for accessing information on the area. (Appendix A)

The surveys collection was three methods, with all results being analysed as a whole,

- face to face interviews at the Assynt Highland Games
- completed paper forms at tourist centres and campsites in the area
- on-line questionnaire accessed through email, Facebook posts, sharing by partner and supporting organisations

Survey Results

The survey ran from 30 July 2018 until 10 October 2018, with 417 completed surveys.

Based on CALL estimated tourist figures of 78,336 visitors in 2017 for both Coigach and Assynt, the statistical accuracy is 96%. This means that asking all of the visitors in 2017 the responses in percentage terms would change by ±4%.

The 417 completed responses rate changes to 94% accuracy for 1million respondents (±6%). The figures and details provided can therefore be assumed to be a true reflection of the visitors to the region in 2018.

Tourism Analysis

Background

Coigach & Assynt Living Landscape (CALL) is a unique community partnership project which aims to bring environmental and economic benefits to the Coigach and Assynt regions of North West Scotland. CALL is one of the largest landscape-scale restoration projects in Europe, covering 635 square kilometres, included within a 40-year vision. As an initiative of the partnership, the Coigach & Assynt Living Landscape Partnership (CALLP) Scheme is a National Lottery Heritage Funded project committed to delivering a Scheme comprising 28 individual projects. over 5 years to September 2021

The projects cover

- Land management
- People, skills and training
- Paths and access
- Cultural and built heritage

With Tourism as the largest economic activity within the area it is an important industry for local people, business and heritage. The development of the Coigach and Assynt App Project (mobile software application) for the area is linked closely to this sector and an overview of the importance has been indicated, through an agreed approach for the survey, with the main emphasis on developing a visitor friendly app.

Tourism Organisations

A review of the area covered in the survey clearly showed several organisations whose aim is to promote and increase tourism and local development. This was recognised in 2011 by HIE funded research (Tourism Resources Company, 2011), with the main challenge as Lack of Clear Identity/Consumer perception. For the development of an online resource, such as an app, this continued confusion will strongly hinder the potential download numbers of the app.

The success of the NC500 has been on creating a clear, concise marketable product, however the buy in and monetarisation has not reflected the number of followers on Facebook and website hits. However, from the results from Internet searches on both Google and Bing for "North West Scotland", it is only the VisitScotland website that appears on the first page from the list below.

The other main sites identified by the research are TripAdvisor, Lonely Planet, Rough Guide and Scotland Info EU. Therefore the promotion and ranking of each of the sites listed below are low on Google and other internet search engines through Search Engine Optimisation (SEO).

The following is a list of sites that have overlap with the Coigach and Assynt regions.

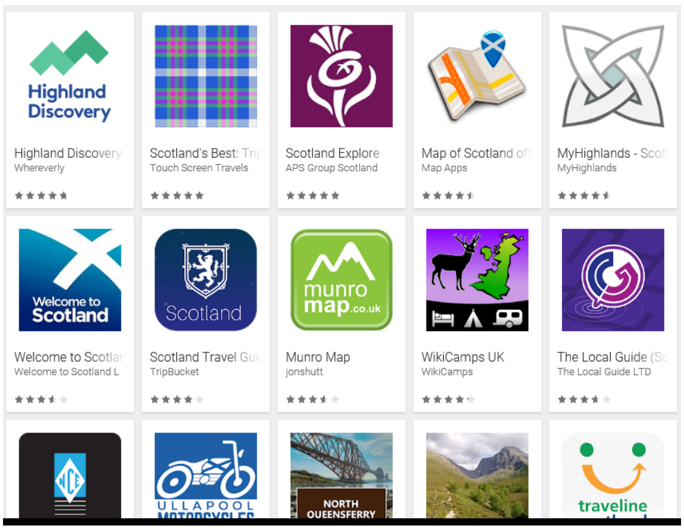
Area Promoted Organisations	Web Address
Achiltibuie and the Summer Isles	achiltibuie.net
Achiltibuie and the Summer Isles	coigach.com
Cape Wrath Trail	capewrathtrailguide.org
Destination Lochcarron	www.lochcarron.org.uk
Kyle of Sutherland Development	www.heartofsutherland.co.uk
Mackay country	www.mackaycountry.com
North Coast 500	www.northcoast500.com
Northwest Highland Geopark	www.nwhgeopark.com
Venture North	www.venture-north.co.uk
VisitScotland	www.visitscotland.com
Visit Sutherland	www.visitsutherland.org
DiscoverAssynt	www.discoverassynt.co.uk
Welcome Ullapool	www.ullapool.com
Wester Ross	www.visitwesterross

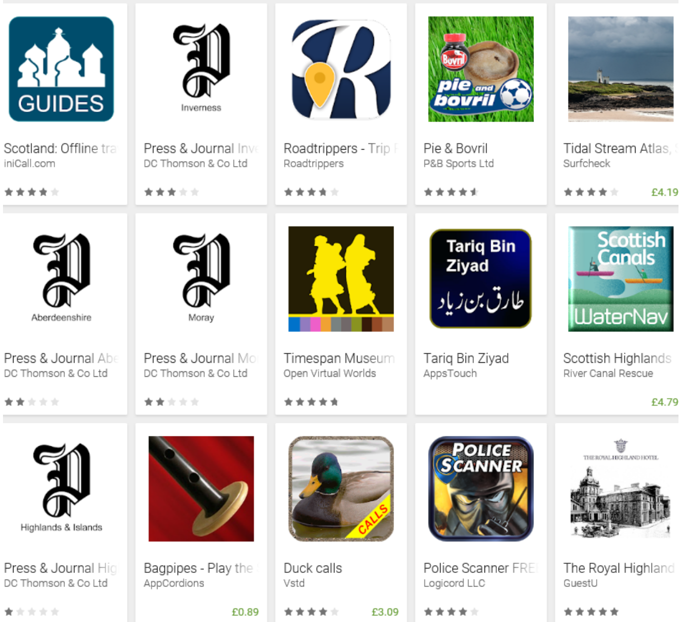
Tourism Apps – Local Coverage

A number of sites have developed apps to promote different aspects of the area. The most notable is NC500.

The recent launch of The Local Guide covering the full NC500 with MP3 curated routes provides an opportunity to work in partnership with an app developer. The two founders are both from Lochinver, so supporting them fully fits with CALL's objectives. The Highland Discovery App also provides curated routes for the downloadable information, apps, music and offline material, to create tailored experiences.

The image below shows a snapshot of the apps available covering general interest, such as walking and outdoor activities, for the North West Highlands of Scotland.





Conclusion

The worldwide promotion of the NC500 has created an increase in visitor numbers to the whole region. The investment in the site SEO for the area however is low and does not appear in a generic search until page 3.

The area lacks clear identity to allow potential visitors to search for information on the area. There is no clear, co-ordinated promotion or recognised branded identity for a strong online presence. This is for local sites, Scottish wide sites or international recognised searches. The main sites listed above appear for individual searches or within the first two pages for West Highlands, but none appear in the top 5 hits across Google or Bing. This report recommends investment in creating content and strong links to the established sites and subsequent apps. This would be an advantage for CALL.

Overall the continued spend and investment on the many fragmented websites does not allow for a single source site for the most up-to-date information and details for potential visitors. This is then compounded when we look at the apps that cover the region, with more private sector businesses such as NC500, The Local Guide, Lonely Planet etc. developing apps for the area.

Recommendation

Developing content for the CALL website or a new area mobile website that combines many of the other standalone area sites is important, with investment in strong Search Engine Optimisation (SEO) vital. Clear links to all tourism businesses within the area is also required. A hybrid app can then be created on the back of this strong mobile web, which would provide the best of both opportunities.

Mobile App Analysis

Introduction

Apps are software applications accessed through smartphones and other hand-held mobile devices. Mobile applications frequently serve to provide users with similar services to those accessed on PCs. (Technopedia, 2018)

They allow users to access content when connected to phone signal or wifi, and increasingly when offline. The growth of apps has expanded rapidly and with smartphone usage at its maximum and remaining steady in the UK the use of apps and opportunities can now be measured based on the finite market of mobile phone users (85%-88% of population). (CommScore, 2018)

Value of the App market

Mobile App Revenue in UK by $Billion 2013-2025

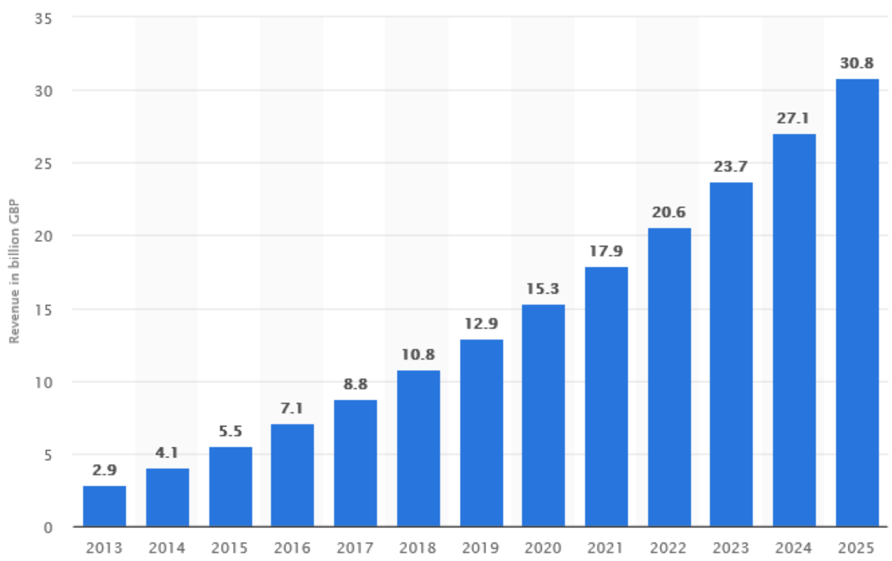


Figure 1. SOURCE: STATISTA.COM

The app market is dominated by the gaming industry across the four main app stores, Apple App Store (23% of 2m apps), Google Play (21% of 2.6m apps), Windows Store (20% of 669,000), and Amazon App (61% of 430,000 apps). (Soko Media, 2018) Mobile game revenue has now passed $13b, now represents 76% of all app store spend. (Boxall, 2018)

Blackberry World is effectively removing itself from the apps market with the removal of all paid apps and will not support in app purchase, meaning the payment mechanisms must be supported by the app developer. To this extent it effectively removes them as a long term player for new and smaller app developers. (Statt, 2018)

Windows Store has introduced a reduction in the commission charged for non-game app developers that will help promote their own store and integration to the Windows 10 features. This will potentially increase the number of non-gaming apps available through this store. (Burton, 2018)

Travel apps have declined to less than 4% of the market downloads from Apple App Store and similar figures are seen across the other app stores. (Hadwick, 2017)

Mobile App Market Size

The number of apps being developed is growing exponentially, however the research from Business of Apps suggests that most people regularly use only 10 apps on their devices, with many of the larger brands having the strongest loyalty and buy in (Soko Media, 2018) The opportunity to monetarise an app is very small for most businesses with most content being offered free and gaming accounting for over 80% of income generation for apps. (Boshell, 2017)

App Shops

The market for downloading apps is dominated by the two main players Apple App Store and Google Play. Windows and Amazon have now entered this market and are creating alternate outlets for Android based apps. As of 1st October 2018, Apple App Store had 2million apps available to download and Android outlets combined had 3.5million apps available (Soko Media, 2018) This suggest that it would require a vast budget to promote and gain a foothold for a new app with the very particular and specific remit of promoting and supporting the access and tourism efforts of CALL.

Content

Apps require constant updating, with the building of additional interesting and interactive content required to maintain engagement and meet the expectations of users. The introduction of VR for tourism apps has increased the cost and level of technical expertise needed to enter and remain in this market. This will increase the potential size of the app and may be less readily accepted by consumers who are restricted by storage capacity.

App Fatigue and Storage Space

With over 3 million apps available and the storage capacity required to gain maximum use of an app there is increasing app fatigue. Most users now have 80+ apps on their devices, with a daily usage of 10 apps, with the top 5 daily use apps being social media, email, web access, gaming and entertainment (McGivney, 2018).

As many apps become more sophisticated and users want to access information offline, the size of apps and therefore storage space on phones has needed to be increased. A survey by Manifest found that 51% of people delete an app each week. Two thirds of these people deleted the app because they weren’t using it or it didn’t meet their needs a significant amount of the deletion (half) was simply because their phone’s storage space was full and they needed space. (Panko, 2018).

The average size of apps is 38MB for Apple Apps and 15MB for Android Apps. (Boshell, 2017)

Figure 2 shows the average file size by type, with newsstands being the smallest and travel standing at 36MB. Social media is relatively small in comparison at 28MB and as the most accessed will be less likely be deleted. Games ranking high in use will often mean other apps will be deleted to allow higher calibre apps and graphics to be downloaded.

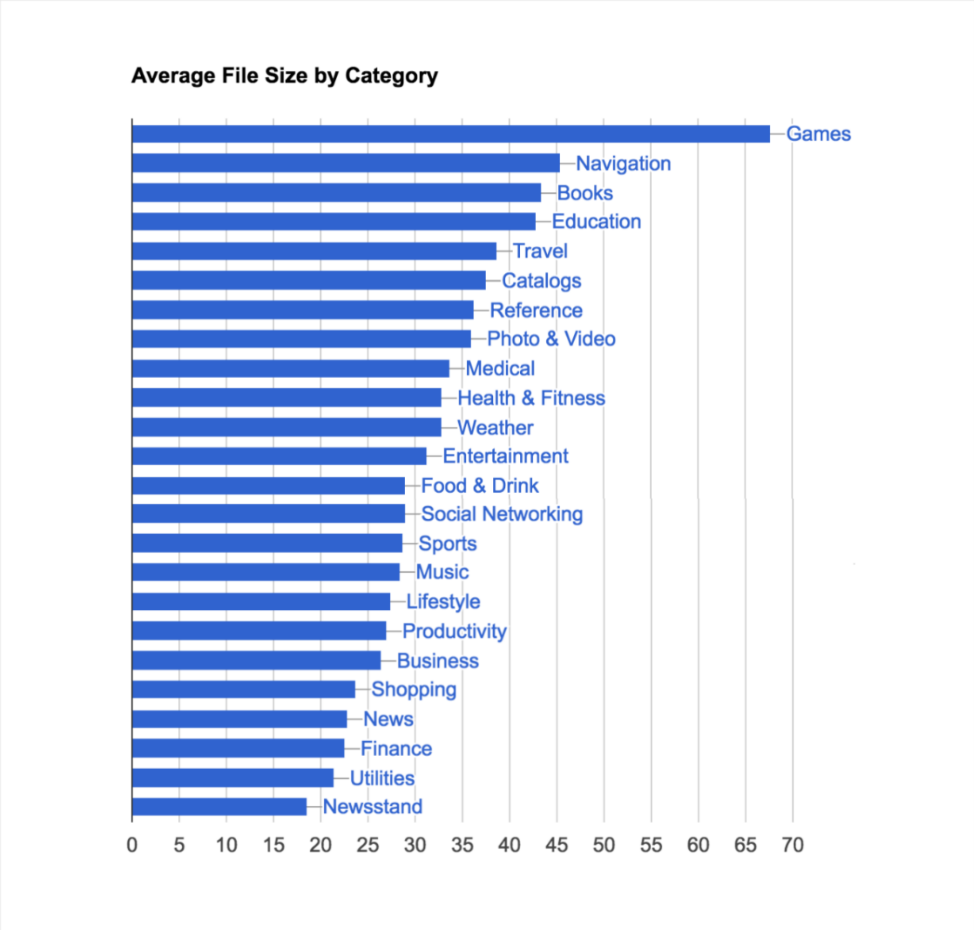


Figure 2. SOURCE: SWEETPRICING

Apps and Tourism

It is not all doom and gloom for tourism apps, with recent reports showing that travel apps will potentially become more popular in future as the added value they bring is recognised. Much of this will be through the large players, Google Map, Booking.com, TripAdvsor, and many of the other Google applications such as Google My Business, and Google Trip (McGivney, 2018)

Mobile has transformed the way people book accommodation. Globally, 42% of people have booked a hotel on mobile according to the Hotels.com mobile travel tracker. Some 76% of travellers named their mobile device as their number one travel accessory. 42% have made a same day hotel booking thanks to their mobile, with 14% booking their hotel in the airport departure lounge (Hotels.com, 2016).

Nearly half of travellers say their mobile is the primary way of finding interesting spots, events, and restaurants while they are away (Hotels.com, 2016).

Hotel.com found that mobile web traffic was increasing almost across the board, with the exception of travel recommendation sites (O'Mahon, 2018). They attribute the fall in internet traffic to travel recommendation sites to more mobile traffic for these sites coming proportionally more from apps. This is for the larger players such as Booking.com and Hotel.com who are building tailored offerings to customers based on their search and booking criteria. This is also building strength with the additional Google apps combining Google Maps, Google Flight, and Google Trips (McGivney, 2018). Overall, mobile traffic is now estimated to be close to or more than half of all traffic, underlining how crucial apps are.

The entire digital world seems to be empowering customers to make their own decisions about purchases rather than relying on advertising and paid search rankings. Smartphones are personal research tools that are creating a generation of well-informed and agile consumers who are gaining increasing independence and confidence.

According to the research the mobile web is in the ascendancy. In all four global markets - Europe, North America, Asia and Australasia – it found that all of the travel sites analysed received the majority of their daily visits via mobile web (Eye For Travel, 2017).

However, when it came to purchases people were more likely to buy on desktops. The average conversion rate (the number of people who view and buy) for all sites on desktop was 2.7 times higher than on mobile browsers. Globally, the travel sites had a conversion rate of 3% on desktop and 1.1% on mobile browsers for accommodation bookings. However, Booking.com had more than double the global average conversion rates with a 2.6% mobile web conversion rate and a 6.5% desktop conversion rate. The report attributes the success of Booking.com to: "A combination of savvy digital marketing, persuasive design, ease-of-cancellation and intuitive user interfaces." (Jumpshot, 2016).

This research suggests that for prebooking of holidays and information on destinations, it remains important to have traditional desktop websites and mobile sites. The direct app usage is not important until they are at the destination. The potential development of an app should be secondary to ensuring the design, content and accessibility of the website for PC and mobile devices.

Mobile – App, Native or Hybrid

Overall the amount of time spent on smartphones and tablets is increasing and it is important for travel based organisations and destinations to engage with customers on mobile devices. There are alternate methods to achieve this, native apps, hybrid apps and mobile web.

Native apps are the most expensive method and with some travel sites investing £1million to develop it is an expensive and large investment for any business. (Eye For Travel, 2017)

Mobile web is a priority for most businesses creating responsive websites that allow a strong and clear web browsing experience regardless of the access from PC, tablet, smartphone or even Smart TV. The benefit is the information is compatible over any device, browser or platform. The cost of developing is lower and the information content can also be accessed from other apps, mobile sites and is easily searchable. The mobile web has a huge reach, sites are easier to build and maintain and are an ideal solution to create a strong base for the mobile market.

Hybrid apps provide the advantages of the mobile web and native apps. They are built utilising mobile web technologies and languages but are hosted in a native app that uses the mobile device web viewer. They also allow the brand to have a presence in the app stores in addition to the search engine reach through web browsers. A successful example of this is Instagram.

Conclusion

The mobile apps market is a growth industry and has strong potential for tourism and travel based business. There is a strong opportunity to develop an app that will allow CALL to capitalise on the growth in the apps market; however this enthusiasm must be tempered with the cost of development, the volume of apps in the market place and the potential monetarisation of the content.

A strong web presence that first captures the potential visitors as they browse mobile web is vital. A well-designed responsive website will be able to handle the majority of visitors' requirements as they book accommodation and travel through desktop and then mobile apps for browsing and information gathering and finally app for when at destination. This need not be a native app, but a hybrid app.

Recommendations

The development of a native app is cost prohibitive and the initial work on developing a stronger focused mobile website would be advantageous. This content can then be used across many platforms and sales points, as well as offered through other people's apps. The development of hybrid apps that allows app store presence can then be developed, at a lower cost.

The most important area is to develop appropriate and easily accessible information. The research suggests this is maps for walks both long and short.

Visitor Surveys Analysis

Introduction

The core of the research was to carry out a survey of visitors to the area, to assess the activities they are interested in when on holiday, the pre-visit planning and the online visits made. This also included assessment of the present information accessed both through traditional means at present and future opportunities. The survey form can be found in Appendix A

The response rate was exceptionally high and provided insights from people across UK, Europe, and the Rest of the World. The full report survey can be found in Appendix B

Visits Duration and Accommodation

Most respondents visited the region on holiday with the majority of visitors (90%) staying between 2 and 10 days. Self-catering accommodation was most popular for visitors at 34%, followed by 15% bed and breakfast, 12% using Public campsite for caravan/motor home and 11% using Public campsites for tents (Figure 3).

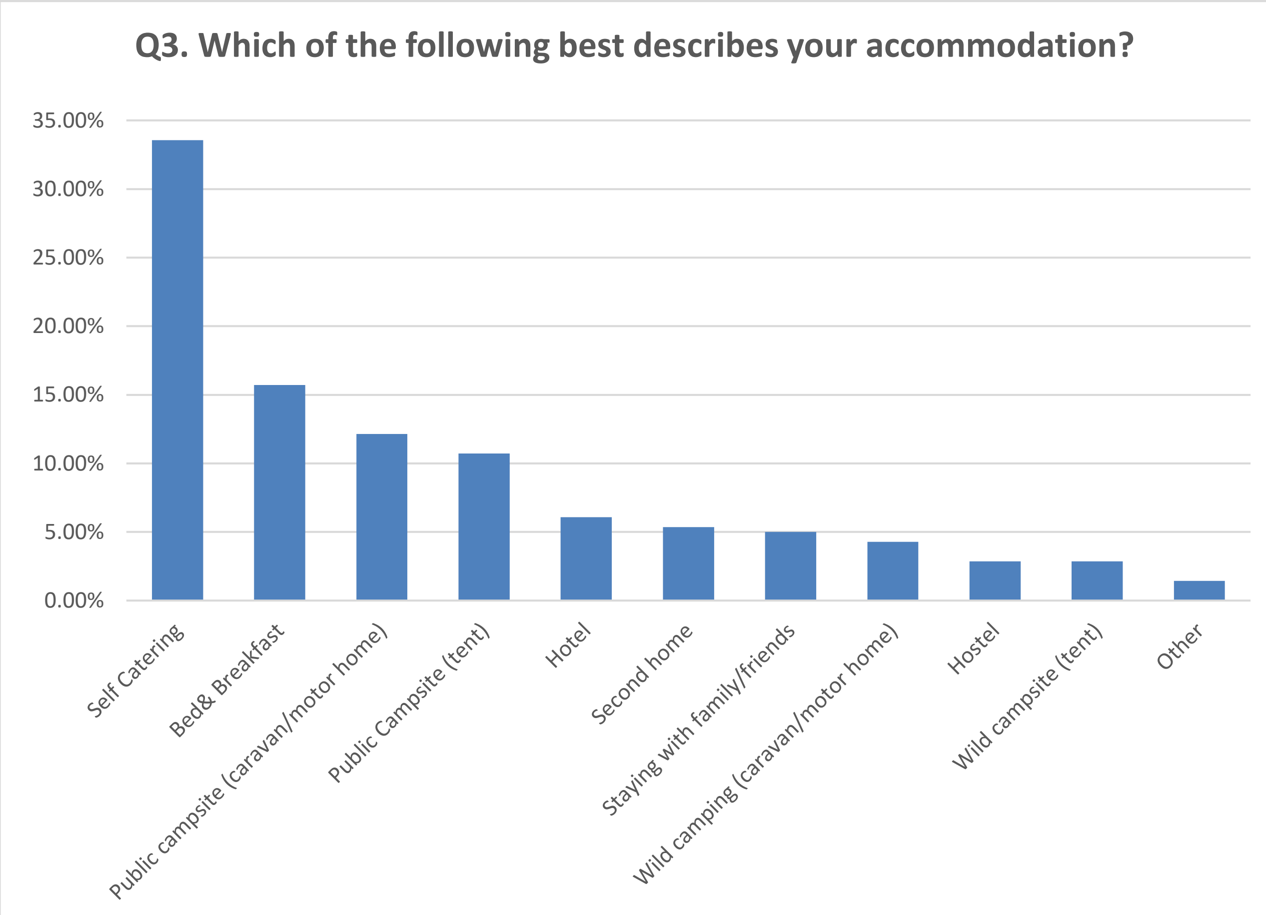


Figure 3. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

Activities

The top activities for visitors are very much about enjoying the outdoors and the local area, and the extent and varying interest for visitors is shown in Table 1. The varying sites utilised to find out about the area reflect this diversity of interest, and with WalkHighlands ranking highly for 68% of visitors interested in short walks and for 49% interested in long walks.

Q4. What activities will you participate in? (Tick all that apply)

Answer Choices	Responses	
Walking - up to 3 miles	67.97%	191
Beaches/rockpools	66.19%	186
General sightseeing	61.92%	174
Hiking - over 3 miles	48.75%	137
Natural history	43.06%	121
Human History/Local heritage	34.88%	98
Crafts	26.69%	75
Museums	21.71%	61
Boat trip	19.57%	55
Geology	19.22%	54
Kayaking/canoeing	15.66%	44
Archaeology	14.59%	41
Cycling	13.88%	39
Climbing	10.68%	30
Mountain Biking	5.34%	15
Fishing	4.98%	14
Snorkelling	3.91%	11
Sailing	3.56%	10
Eating Drinking Relaxing	1.78%	5
Diving/ Wild Swimming	1.42%	4
Volunteering	1.42%	4
Photography	1.42%	4
Folk Music	1.07%	3
Wildlife	0.36%	1

Table 1. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

Pre-visit Sources of information

Reports from 2016 onwards continue to identify the variety of methods used for researching, booking and paying for accommodation, tours, activities etc. throughout the travel purchase. The research reflects other findings that the initial research is often on a mobile device, with booking predominantly PC based, with apps only accounting for activity when at their destination.

The main source of information for trip planning is still the PC and mobile web, when at the destination it remains the visitor centre and printed material that dominates the source of information for tourists, although apps have the potential to grow. (Failte Ireland, 2017).

Visitors researched different aspects of holidaying in the CALL area before arrival (Figure 4). The responses from the CALL survey show transport prearranged at 90% and accommodation fully planned at 71%; The on holiday activities ranking lower in the pre-booking figures, all showing less than 10%.

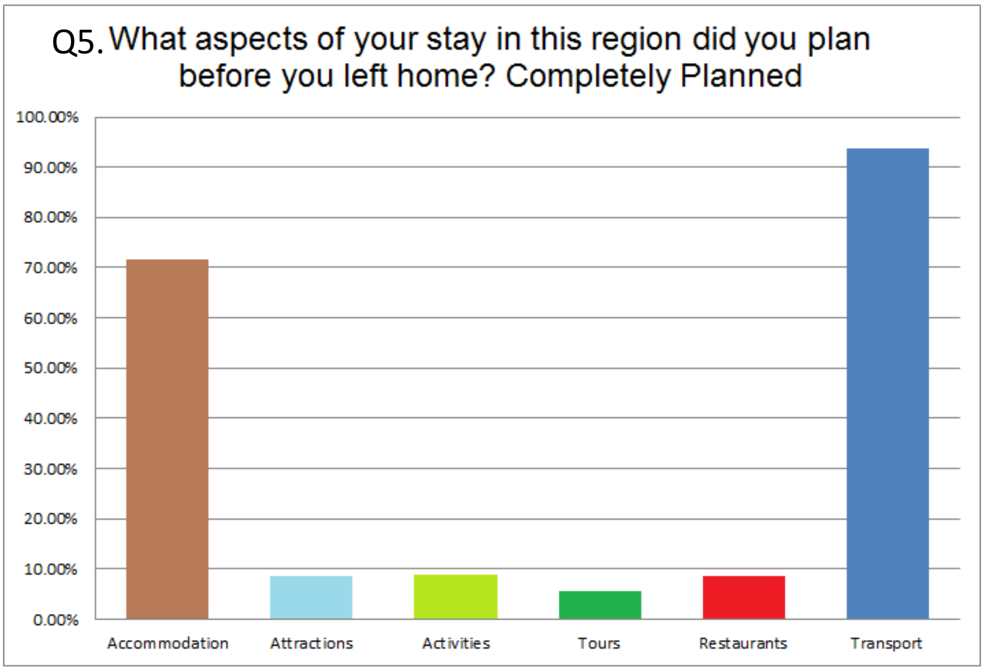


Figure 4.SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

NOTE: Due to ambiguity within this question, the responses for fully booked and no booking for transportation have been joined. The question was interpreted differently by respondents e.g. Some driving in their own vehicle ticked completely planned and others ticked no plans. For this reason, the no plans for transport have been joined with completely planned. This applies to Figure 4 and Figure 5.

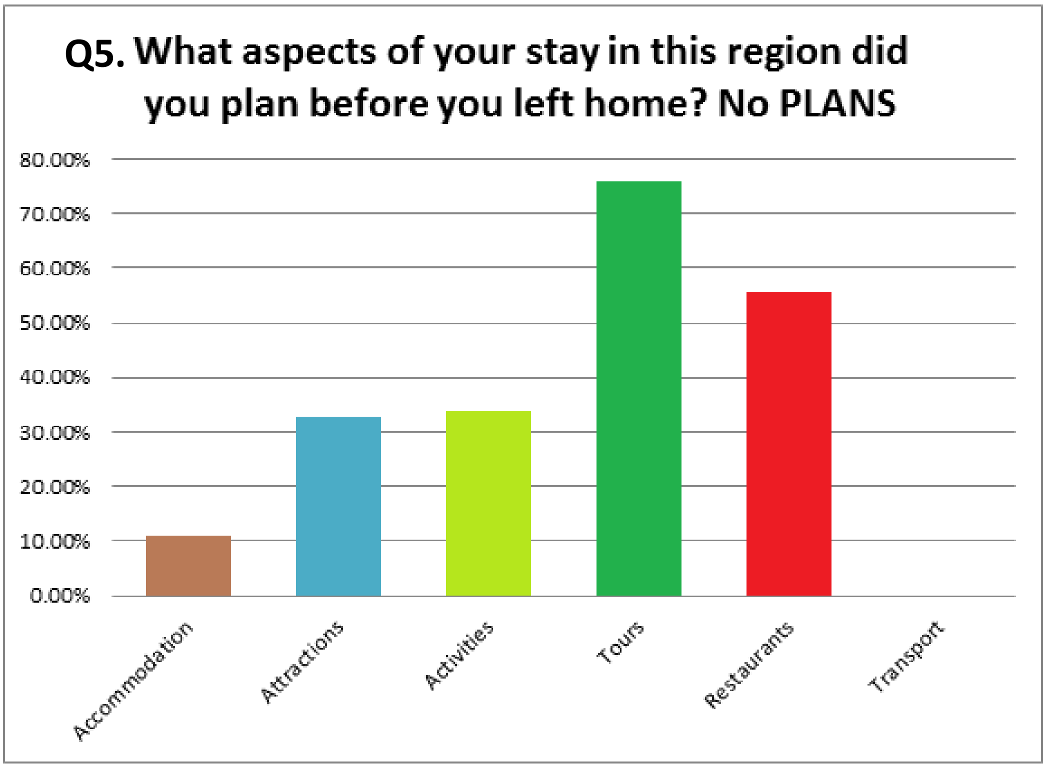


Figure 5. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

The holiday aspects/activities that received no planning before the respondent left home are shown in Figure 5. 75% of respondents had no plans for tours, 55% has no plans for restaurants, 35% had no plans for Activities and 34% no plans for Attractions.

The CALL Survey highlights the websites viewed by visitors before arrival and although they have app versions, it can be assumed that the website's either desktop or mobile version is accessed as seen in Figure 6. This is particularly clear for the second top site, WalkHighlands which doesn't have an app.

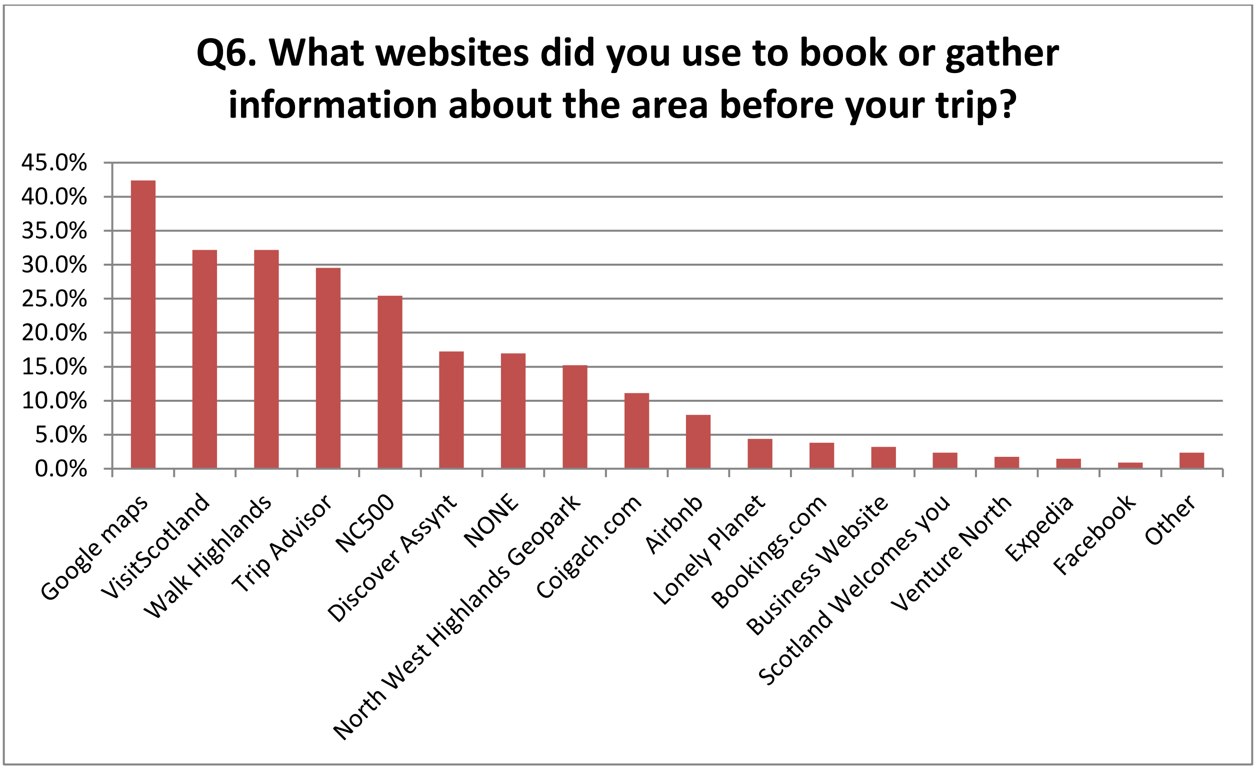


Figure 6. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

Of the None responses – 22 individual responses identified that they knew the area from previous visits or having lived here. There were also 3 who purchased guide books before booking. The other sources identified are accommodation providers' own websites, social media sites, and personal contacts. Other sites identified by individuals are Hostelling Scotland, Geocaching.com, and Hotel.com.

Information Access on Holiday

The survey endeavoured to understand how and where people access information on the variety of accommodation providers, the activities, tours and restaurants, etc. within the region. The results reflected wider societal views and additional research.

In terms of using apps on holiday (Figure 7) the most popular result is for general search through the mobile phone app, where many are unaware that this is an app, highlighting the importance of mobile web. Search engine apps, e.g. Google and Safari, were used by 52% of the respondents.

The second most popular app is maps apps such as Google maps, iMaps, TomTom, Wave etc. at 49% of respondents. The importance of walking maps and route finders for activities was highlighted with Google Earth, WalkHighlands, and Viewranger as alternate map apps to Strava.

TripAdvisor takes 3rd spot for app usage at 30%. The assumption is they use TripAdvisor for tours, activities, restaurants etc. within the area. VisitScotland's app was utilised by 19% respondents. These figures are lower than other research e.g. Eye for Travel, Business of Apps suggest. This may be due to the actual lack of information/content available on these apps for the area. The preferred method of access Google/Safari (mobile web), does however reflect the research findings as the prime source for accessing information, leading to individual business websites at 83% in Figure 9. Additional sources also identified are social media apps, booking.com and specialist interest sites (e.g. vegan food).

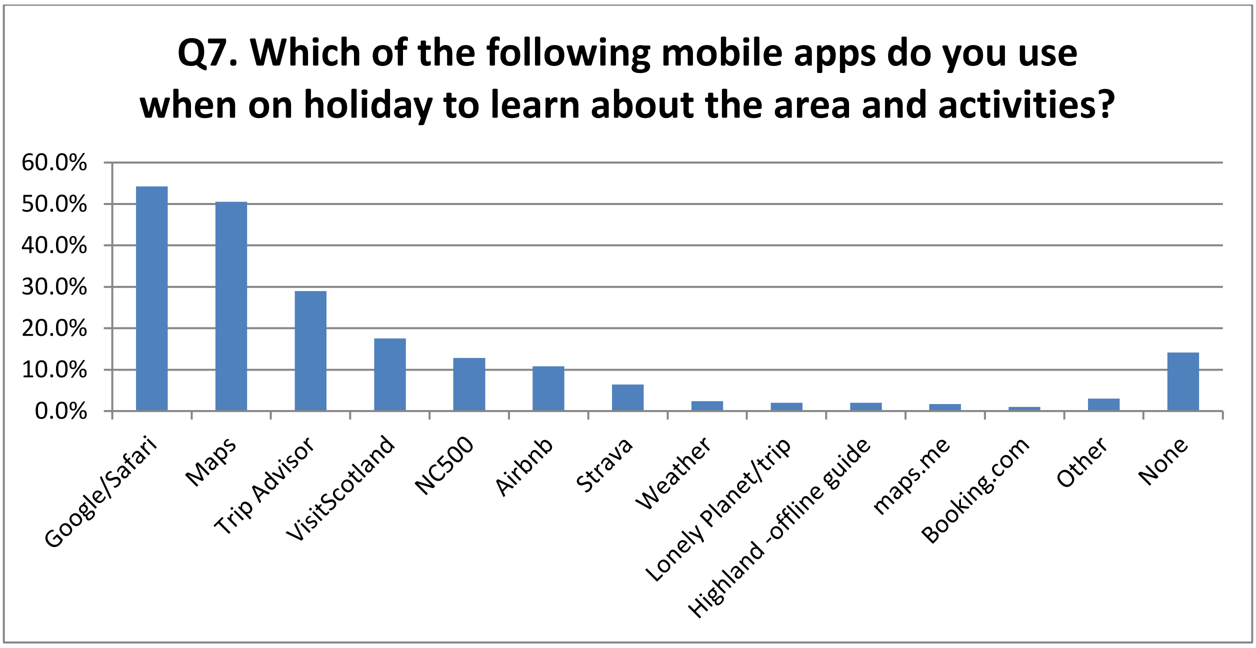


Figure 7. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

The data in Table 2 indicate how people at present learn of activities when on holiday. The use of apps is low with the majority never utilising an app.

Q7. Which of the following mobile apps do you use when on holiday to learn about the area and activities?

Answer Choices	Response
Google/Safari	54.2%
Maps	50.5%
TripAdvisor	29.0%
VisitScotland	17.5%
NC500	12.8%
Airbnb	10.8%
Strava	6.4%
Weather	2.4%
Lonely Planet/trip	2.0%
Highland -offline guide	2.0%
maps.me	1.7%
Booking.com	1.0%
Other	3.0%
None	14.1%

Table 2. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

The responses from Figure 8 show that the demand for traditional flyers and brochures is high. The traditional use of road signs should also not be underestimated to highlight attractions, activities and view points.

The preference for respondents to access information from different sources is detailed in Figure 10. Given the option of different sources of information for potential use in the future, respondent displayed a significant preference for printed maps and leaflets.

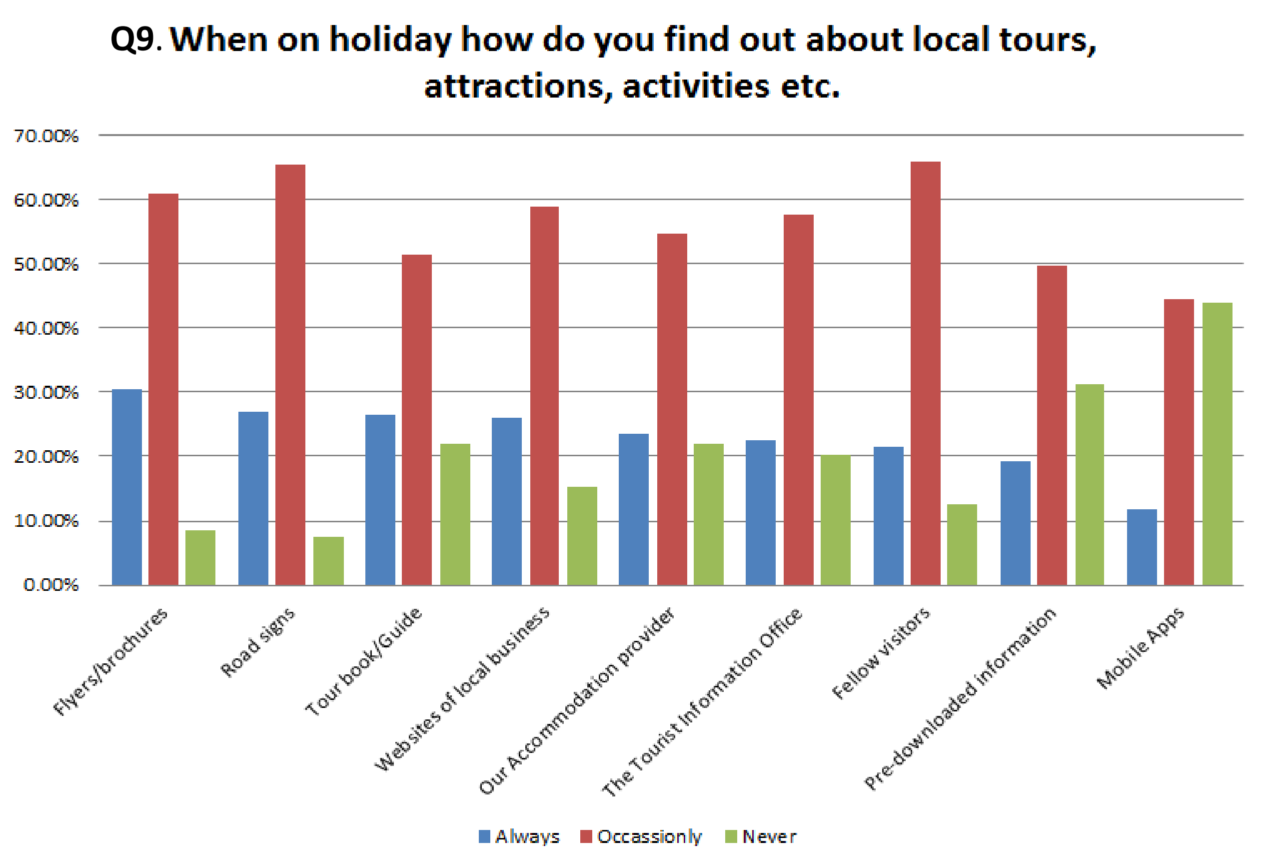


Figure 8. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

This backs up other results from research carried out in Ireland (Failte Ireland, 2017), Australia (Tourism Research Australia, 2015) and general research, with printed Maps and printed leaflets as the top two choices of information source and tourism/visitor centres still playing an important part.

The results also suggest that over 60% of visitors would utilise an app for the area, should it be available.

Combining the Always and Occasionally figures for how visitors find out about activities on and offline, we can clearly see the vital importance of road signs (92.4%), followed by printed material (91.8%), as shown in Figure 9. The importance of other visitors and individual websites of local businesses provides a high ranking, while mobile app is lowest at 56.6%.

Figure 9. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

Visitors responded on how receptive they are to traditional and new information formats (Figure 10) and provide valuable information as to future tourist information needs.

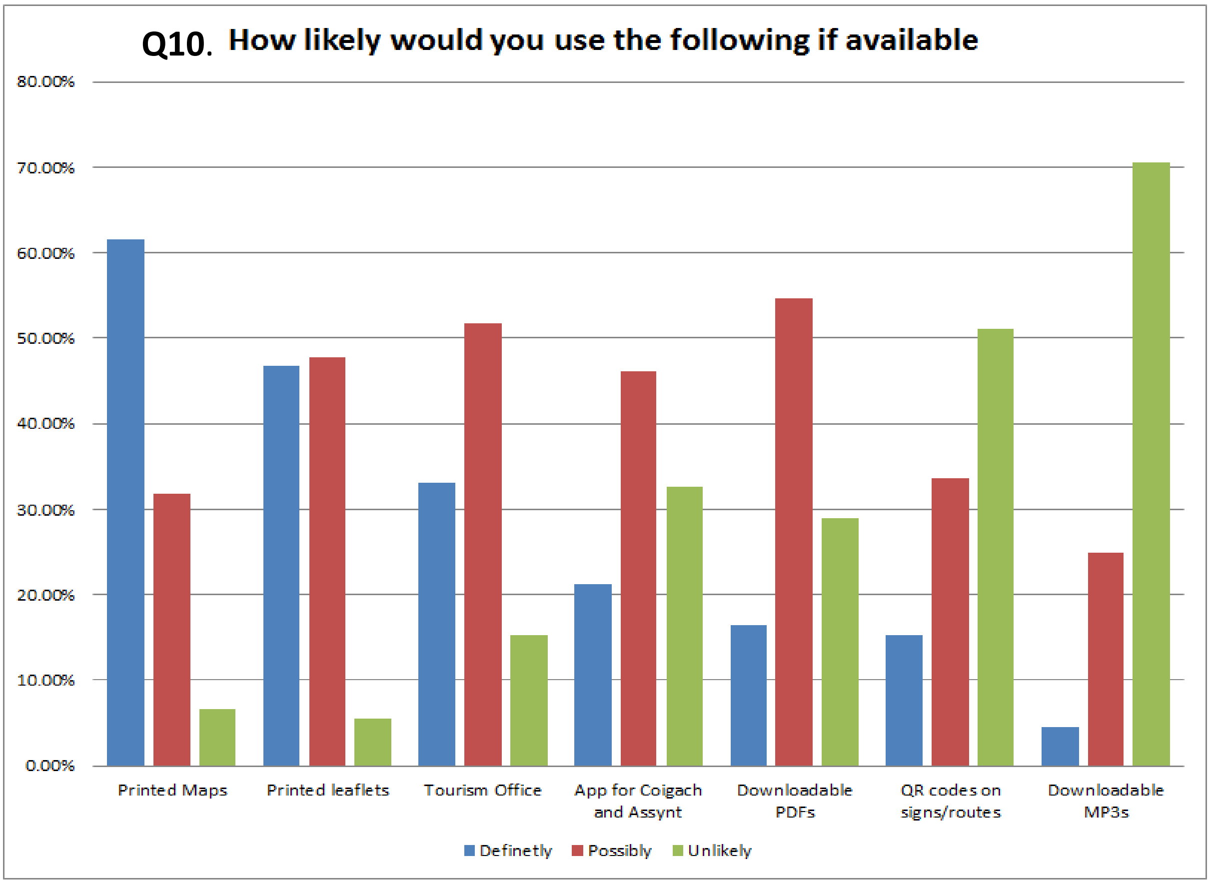


Figure 10. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

Combining Definitely and Possibly figures indicates visitors most important method for accessing information is by printed leaflets (94.6%), closely followed by printed maps (93.3%). The need to ensure that visitor centres remain available to obtain information is clear at 84.8%. The use of downloadable PDFs is reasonable and these may be accessed through the areas app 67.4%, but should also remain available through mobile web and other sources (Figure 11).

The potential use of MP3s is very low with 70.5% of respondents never likely to access this information. This is equally so for QR codes as a means to access information with 50.1% of respondents never using this method.

Q10. How likely would you use the following if available? Definitely and Potential usage in future

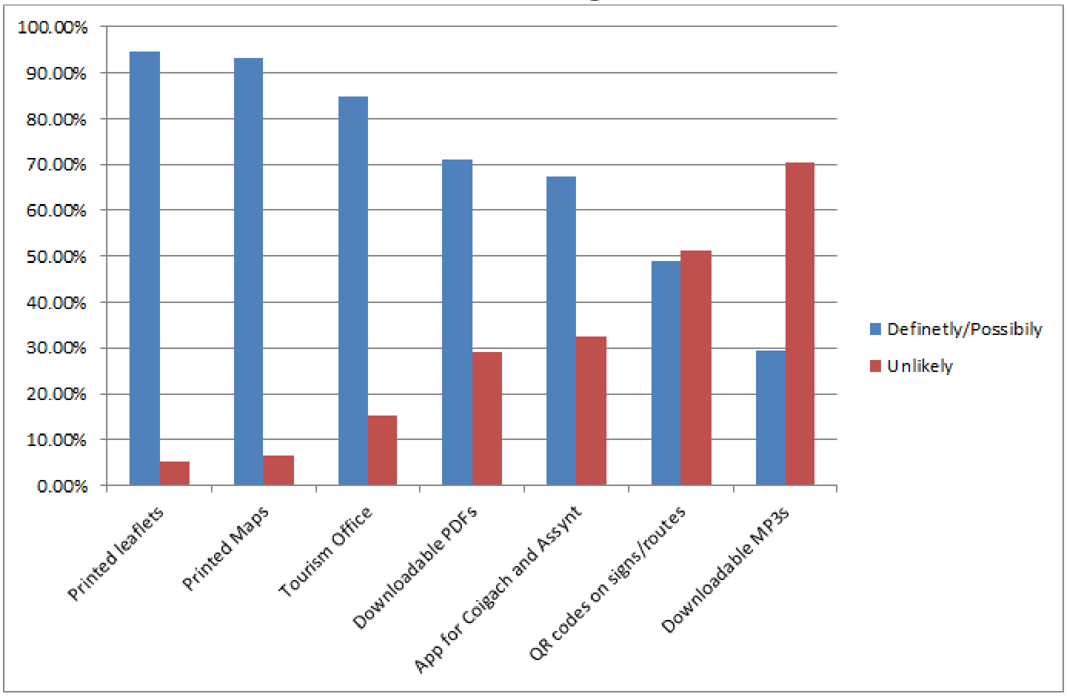


Figure 11. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

The Irish, Australian and indeed South Korean reports have identified the reasons for using tourist/visitor centres is for the main point of call to gain the printed maps and printed leaflets as well as other information. (Simpson, 2015)

Reasons to visit a centre

- Maps of the area
- Information on attractions in an area
- Information on activities in the area
- Directions around the region
- Purchasing souvenirs
- Information on local events
- Info on/to book tours and guides
- Regional displays and stories
- Info on/to book accommodation
- Information on local restaurants, cafe pubs
- Access internet
- Use toilet facilities
- Grab a coffee
- Other

Nationalities

The survey was predominantly completed by UK citizens (87%), but a diverse number of visitors from alternate countries have also completed the survey (Figure 12).

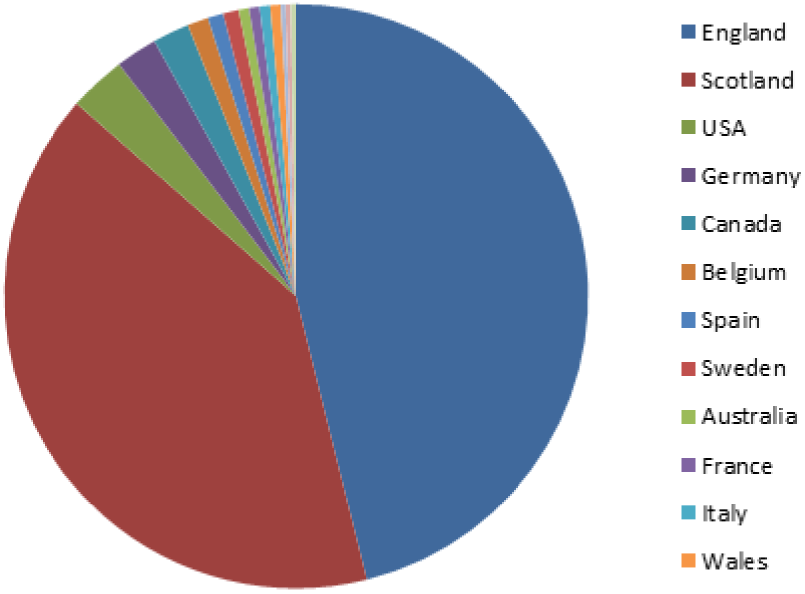


Figure 12. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

Stay Type and Access of Information

One and Two Day Stay Visitors with Accommodation

The respondents for shorter visits staying for only 1 night are low with only 14 responses. The single night accommodation figures show visitors mainly stayed in paid accommodation with B&B being the top choice at 35%. Public campsites accounted for 29% of respondents for tents and motorhomes. It can be assumed the 21% Self Catered will be through Airbnb, where there is more flexibility in the number of nights, than through traditional booking sites such as Welcome Cottage. 1 respondent stayed with family and only 1 wild camped. Hotels surprisingly did not rank for short 1 or 2 day stays in the area.

Figure 13 shows that for One or Two Day Stay visitors that apart from accommodation with half pre-booking and knowing their transport arrangements, no other activities is booked, although some research of activities, tours and restaurants have been made.

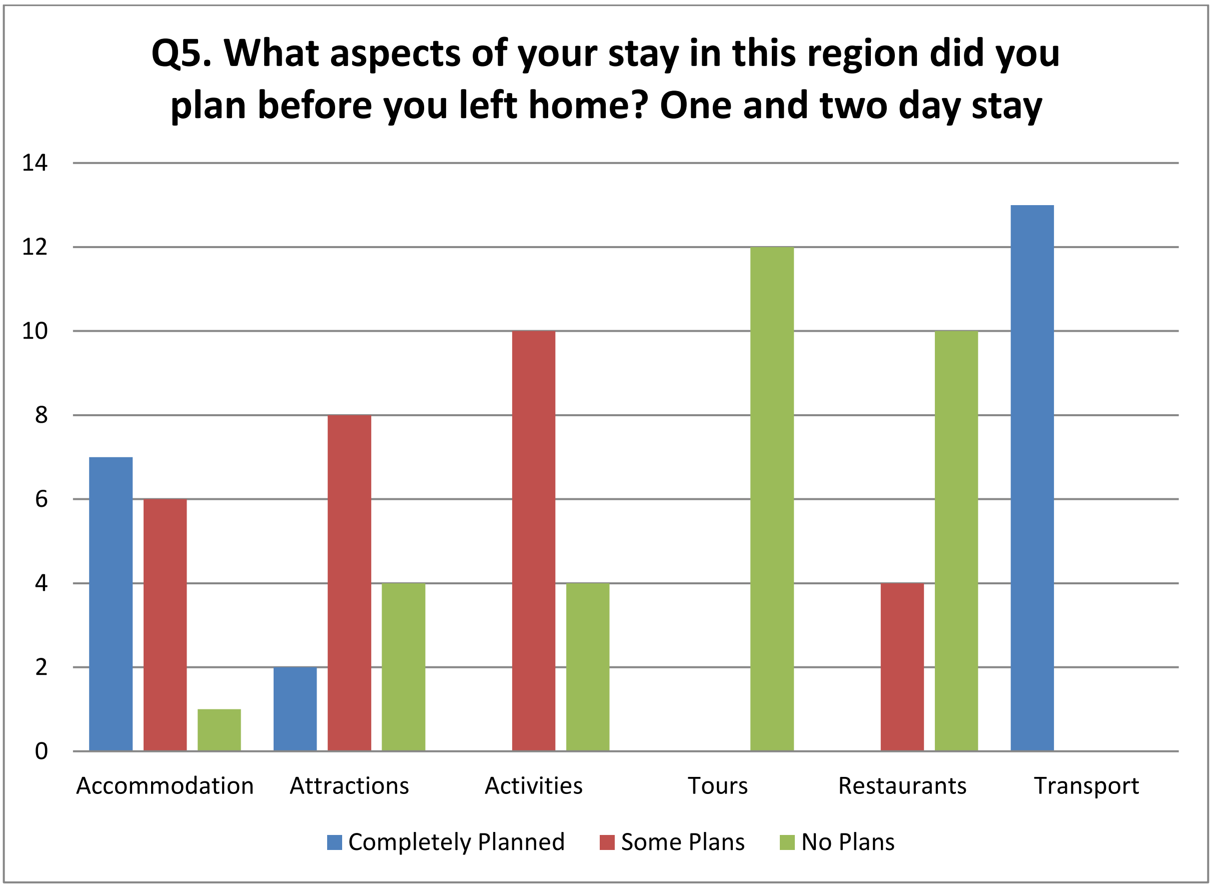


Figure 13. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

For websites visited before arrival for One and Two Day Stay visitors, as with All Respondents, Google Maps remains the most important, with VisitScotland and WalkHighlands ranking equal 2nd. NC500 remains in 4th place for website use (Figure 14) and remains in this position for app usage on holiday (Figure 15).

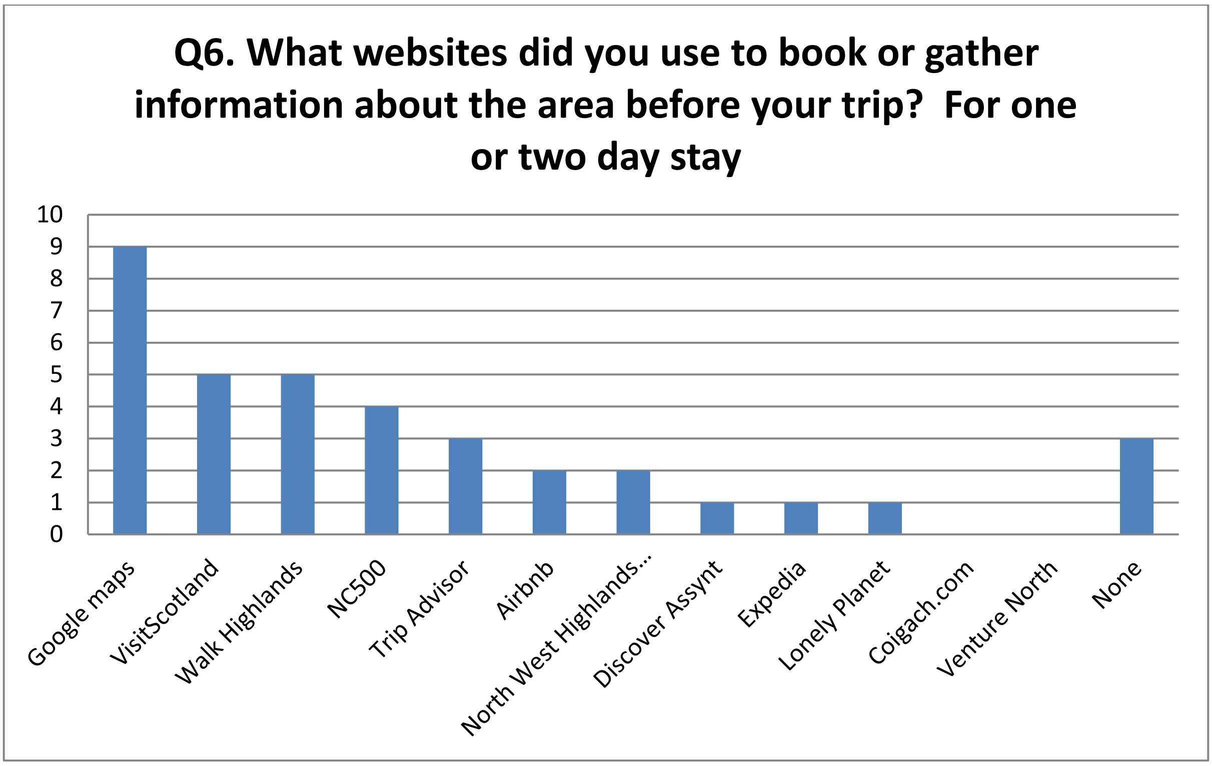


Figure 14. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

The apps used by One or Two Day visitors when on holiday are detailed in Figure 15.

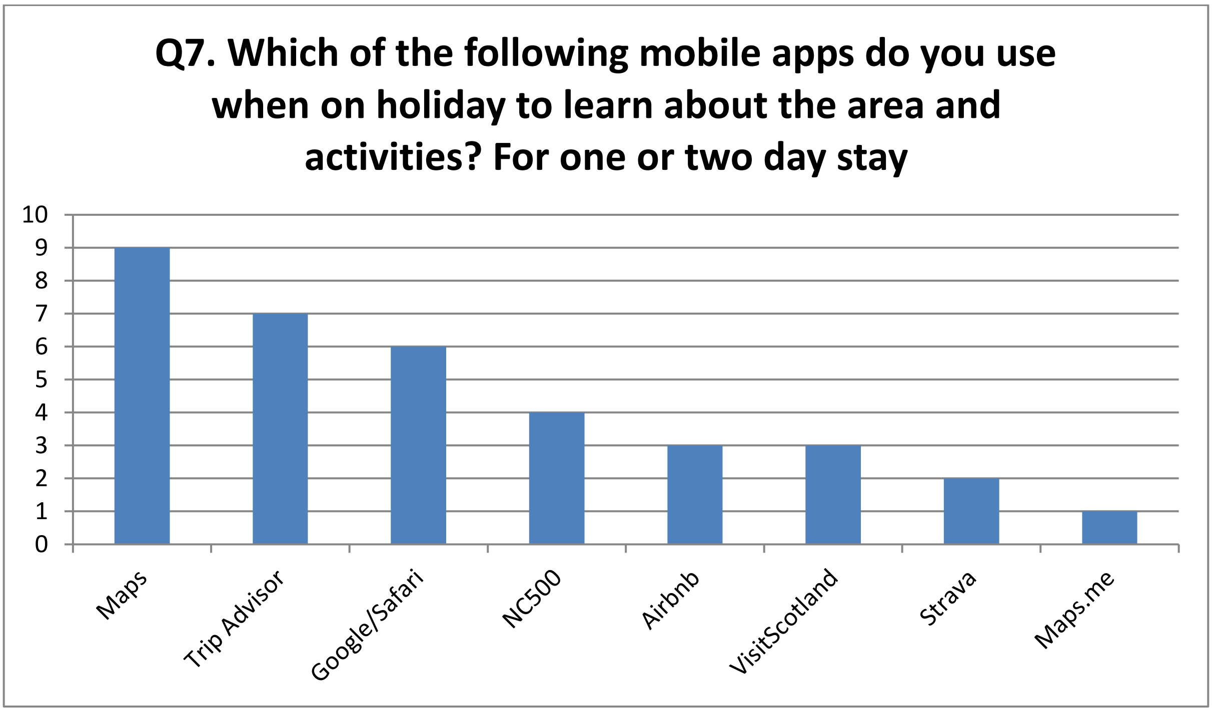


Figure 15. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

The preference for One or Two Day Stay visitors to access information from different sources is detailed in Figure 16. Given the option of different sources of information for potential use in the future, respondent displayed a significant preference for printed maps and leaflets.

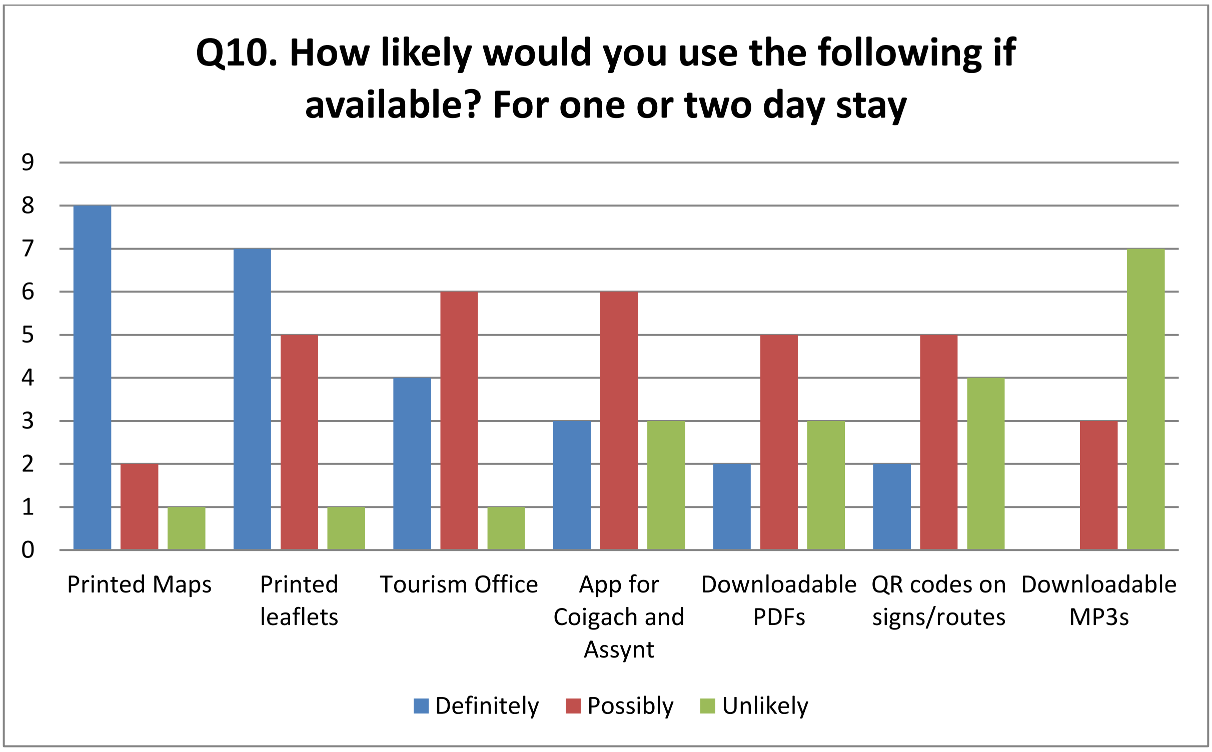


Figure 16. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

Longer Stay Visitors

The main responses for the survey came from longer stay visitors, as detailed in Table 3.

Length of Stay	Responses	
2-5 days	33.87%	84
5-9 days7 day	33.87%	84
10 days or more	32.26%	80

Table 3. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

As would be expected the choice of accommodation covered all the available bed types, however as shown in Figure 17, Self Catering was the most popular with a third of visitors booking into self-catered facilities.

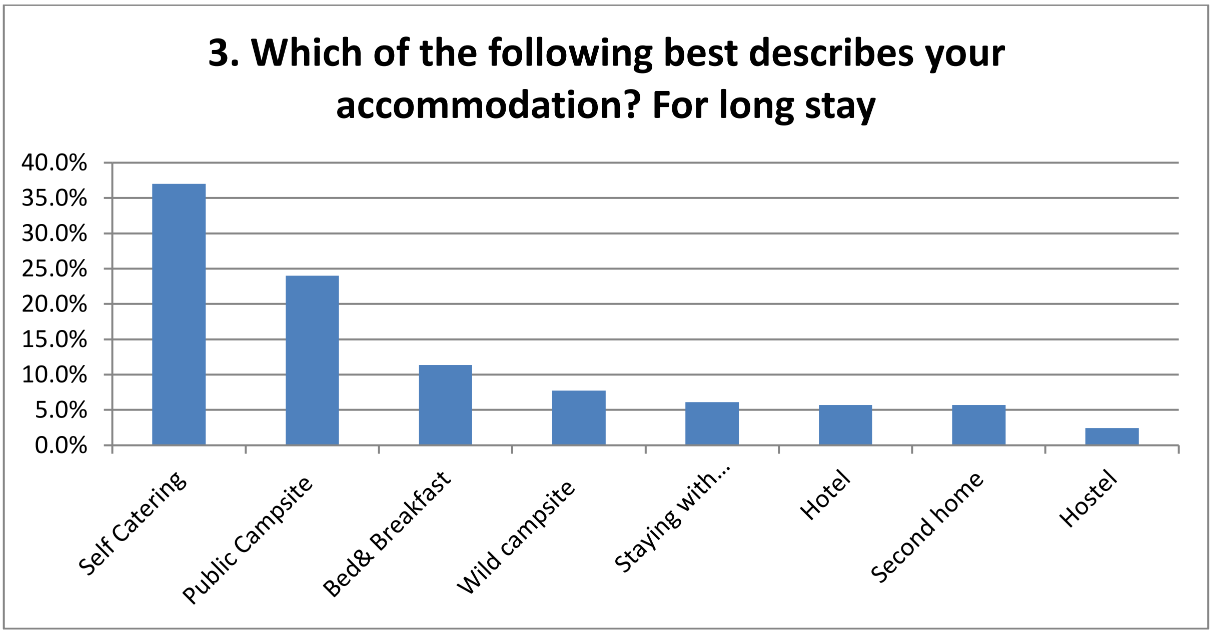


Figure 17. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

Regarding prearranged details of their holiday to the area, the Long Stay Visitors most often pre-booked accommodation and all other areas. As shown in Figure 18 a small percentage had pre-arranged tours, activities and even booked restaurants before leaving home.

This increased booking and preplanning for Long Stay Visitors, shows that those who focus their holiday on one destination, rather than passing through, will do increased destination research and booking before departing home. This is contrast to those on a shorter trip or more touring based vacation.

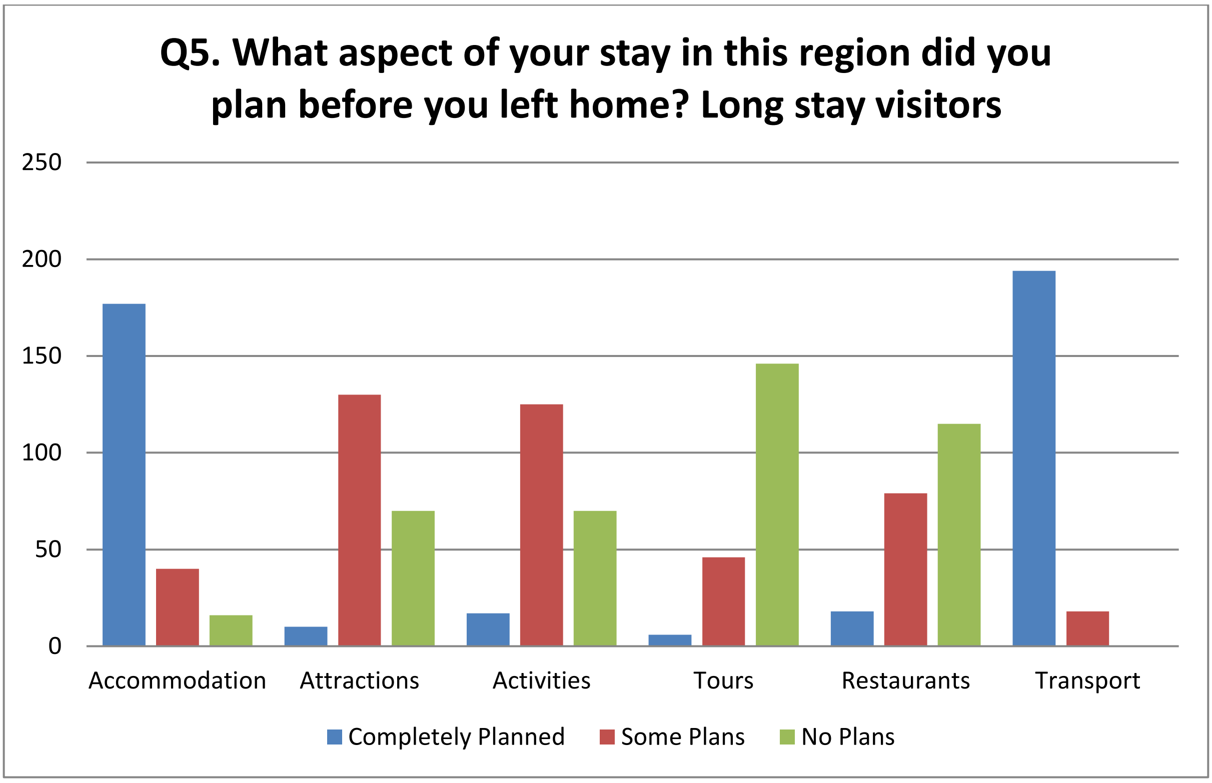


Figure 18. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

In terms of website searches for Long Stay Visitors shown in Figure 19, Google Maps is the most popular, followed by WalkHighlands in 2nd place, VisitScotland is now 3rd and NC500 is 4th. The local area websites hit rate also increased and shows that people intending longer visits will widen their searches for local information beyond the wider Scotland sites.

Figure 19. SOURCE: CALL NORTH HIGHLAND VISITOR SURVEY 2018

Conclusions

The research from visitors and locals strongly suggest that the development of an app may prove of interest to some, but other forms of information gathering are more important. This is particularly true for the pre-booking and holiday fact finding information in the months and weeks before they arrive.

The use of printed material is important, as is the recommendations by visitor centres, local people, the accommodation providers and the general population of the area. Printed maps and leaflets ranked as the highest used and most sought after sources of information regardless of length of stay in the area. To stop producing relevant hard copies of local walking maps, information leaflets will have potential to lose many of the businesses income.

The majority of respondents (91%) access the internet daily or frequently and during that time are likely to utlisie their preferred apps – social media, email, web browsers and entertainment. They are less likely to spend the time downloading a direct app.

Recommendations

An information rich responsive site will gain more impact than the development of a bespoke app. The content, if appropriately created, can be utilised across the devices and will also be created for printed material.

Investing in current established sites could provide a stronger return on promotion than investing heavily in a riskier project with less certain results.

Continued investment in paper maps and information leaflets is required, this should at present be clearly seen as core component of promoting the area. The layout, details and style should be consistent across mobile and PDFs. Printing and availability of the leaflets are still required in the local area and possibly at feeder sites such as Inverness Airport, Inverness Visitor Centre and other tourist information points.

Conclusions and Recommendations

Conclusions

The app market is a very crowded market place. Although there are opportunities the scale of the market and potential to create revenue for a small specialist app is limited.

The early discussions with *The Local Guide* highlight that there has been just over 1,000 downloads, but the in-app purchase has been low. The cost and time requirements to develop high value, quality content is continuous, and many app developers earn less than £300/month. (Soko Media, 2018)

The primary research suggests that in the long term an area based app may be of use. This will not replace the need for printed material but simply complement it.

The purchase and booking of holidays has many stages with people accessing information from multitude of sources and across many devices, depending on their stage in the booking process, irrespective of nationality.

Recommendations

Content Development

CALL should support and create content that can be applied and utilised across multiple devices and can also stand alone as document or maps. The content, words, imagery and details can also be printed for collection and use by visitors in the area. The desire for MP3s is small and would not indicate a requirement to invest in development at this stage.

This content in appropriate form can also be charged and offered to appropriate native apps such as The Local Guide, Lonely Planet, TripAdvisor etc and for walking based activities apps such as ViewRanger. Should Walk Highland develop an app this would also be a potential outlet.

Mobile Web/Hybrid App

The present CALL website should be developed as a mobile web site with more focus on visitor information – this can be a new site with an easier to read/spell name, or a combination of the other local sites to develop a focused area centric website. This can then be developed, with a hybrid app allowing for presence in the app stores.

Partnership

To create a potential income stream, partnering or creating content for established apps, should they be local apps or world brands, would be a more positive opportunity and provide potential income for the organisation. This could also allow local people with the skills, or potential new opportunities for people in the area, to create appropriate interactive content.

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Appendix A

What information helped you?

Help us understand more about the information needs of visitors to the North West Highlands of Scotland. The survey should take less than 5 minutes.

1. Which of the following best describes your planned/current or recent visit to the North West Highlands.

☐ Just passing through
☐ On a day trip travelled from home
☐ On a day trip staying away from home (on holiday)
☐ On holiday planning to stay in the area
☐ Not on holiday/visiting or have not in the last year
☐ Live locally
☐ Other (please specify)______________________

2. How long will you be staying in the area?

☐ N/A ☐ 1 day or less ☐ 2 days ☐ 2-5 days ☐ 7 day ☐ 10 days or more

3. Which of the following best describes your accommodation?

☐ N/A
☐ Hotel
☐ Bed& Breakfast
☐ Self-Catering
☐ Hostel
☐ Staying with family/friends
☐ Second home
☐ Public Campsite (tent)
☐ Public campsite (caravan/motorhome)
☐ Wild campsite (tent)
☐ Wild camping (caravan/motor home)
☐ Other (please specify)
____

4. What activities will you participate in? (Tick all that apply)

☐ Walking - up to 3 miles
☐ Boat trip
☐ Kayaking/canoeing
☐ Diving
☐ Museums
☐ Hiking - over 3 miles
☐ Cycling
☐ Crafts
☐ Sailing
☐ Natural history
☐ Beaches/rockpools
☐ General site seeing
☐ Climbing
☐ Human History/Local heritage
☐ Archaeology
☐ Mountain Biking
☐ Snorkelling
☐ Geology
☐ Other (please specify)
____

5. What aspects of your stay in this region did you plan before you left home?

	Completely Planned	Some Plans	No Plans
Accommodation	☐	☐	☐
Attractions	☐	☐	☐
Activities	☐	☐	☐
Tours	☐	☐	☐
Restaurants	☐	☐	☐
Transport	☐	☐	☐

6. What websites did you use to book or gather information about the area before your trip? (Tick all that apply)

☐ VisitScotland
☐ NC500
☐ Discover Assynt
☐ Airbnb
☐ TripAdvisor
☐ Scotland Welcomes you
☐ North West Highlands Geopark
☐ Coigach.com
☐ Lonely Planet
☐ Expedia
☐ Triposo
☐ Google Maps
☐ WalkHighlands
☐ Venture North
☐ Other or None (please specify)
____

7. Which of the following mobile apps do you use when on holiday to learn about the area and activities?

☐ Airbnb	☐ TripAdvisor	☐ Google/Safari	☐ Maps
☐ Yelp	☐ Trip.com	☐ Lonely Planet/trip	☐ Strava
☐ Triposo	☐ VisitScotland	☐ NC500	☐ Highland -offline guide

☐ Other (please specify) ______________________________

8. Which of the following Social media apps do you use on Holiday? (Tick all that apply)

☐ Facebook	☐ Twitter	☐ Instagram	☐ Snapchat
☐ WhatsApp	☐ YouTube	☐ Tumblr	☐ Google+

☐ Other (please specify)

9. When on holiday how do you find out about local tours, attractions, activities etc.

	Always	Occasionally	Never
Our Accommodation provider	☐	☐	☐
The Tourist Information Office	☐	☐	☐
Road signs	☐	☐	☐
Websites of local business	☐	☐	☐
Flyers/brochures	☐	☐	☐
Fellow visitors	☐	☐	☐
Mobile Apps	☐	☐	☐
Pre-downloaded information	☐	☐	☐
Tour book/Guide	☐	☐	☐
Other (please specify)	____________________________		

10. How likely would you use the following if available?

	Unlikely	Possibly	Definitely
App for Coigach and Assynt	☐	☐	☐
Downloadable PDFs	☐	☐	☐
Downloadable MP3s	☐	☐	☐
Printed Maps	☐	☐	☐
Printed leaflets	☐	☐	☐
QR codes on signs/routes	☐	☐	☐
Tourism Office	☐	☐	☐
Other (please specify)	____________________________		

11. On your visit how often were you able to access the internet?

☐ Daily/Often ☐Periodically ☐ Not at all

12. What is your Post Code:________________________ Country:_________________________

To enter our free prize draw to win a unique piece of Highland Pottery, we require your email address. The email will only be used for the prize draw and will not be linked to any of the responses in the questionnaire. Your email will not be held after 14 October 2018 or shared with any other parties. Only the winning entry will receive a confirmation email.

Please enter me in the Prize Draw Email Address ____

Thank you for completing the survey.
We appreciate your help and we wish you a great holiday in Scotland's Far North West.

Appendix B

CALL NORTH HIGHLAND VISITOR SURVEY 2018: Survey Tabulated Results

1. Which of the following best describes your planned/current or recent visit to the North West Highlands.

3.60%	Just passing through
5.52%	On a day trip travelled from home
9.11%	On a day trip staying away from home (on holiday)
59.95%	On holiday planning to stay in the area
0.96%	Not on holiday/visiting or have not in the last year
13.91%	Live locally
6.95%	Other

2. How long will you be staying in the area?

2.19%	1 day or less
7.30%	2 days
30.66%	2-5 days
30.66%	7 day
29.20%	10 days or more

3. Which of the following best describes your accommodation?

6.07%	Hotel	10.71%	Public Campsite (tent)
15.71%	Bed& Breakfast	12.41%	Public campsite (caravan/motorhome)
33.57%	Self-Catering	2.86%	Wild campsite (tent)
2.85%	Hostel	4.29%	Wild camping (caravan/motor home)
5.00%	Staying with family/friends	1.43%	Other
5.36%	Second home		

4. What activities will you participate in? (Tick all that apply)

67.97%	Walking - up to 3 miles	66.19%	Beaches/rockpools
19.57%	Boat trip	61.92%	General site seeing
15.66%	Kayaking/canoeing	10.68%	Climbing
1.07%	Diving	34.88%	Human History/Local heritage
21.71%	Museums	14.59%	Archaeology
48.75%	Hiking - over 3 miles	5.34%	Mountain Biking
13.88%	Cycling	3.91%	Snorkelling
26.69%	Crafts	19.22%	Geology
3.56%	Sailing	12.46%	Other
43.06%	Natural history		

5. What aspects of your stay in this region did you plan before you left home?

	Completely Planned	Some Plans	No Plans
Accommodation	68.73%	16.81%	14.45%
Attractions	8.74%	56.96%	34.30%
Activities	9.29%	55.45%	35.26%
Tours	5.88%	18.69%	75.43%
Restaurants	9.29%	35.58%	55.13%

6. What websites did you use to book or gather information about the area before your trip? (Tick all that apply)

32.16%	VisitScotland	4.39%	Lonely Planet
25.44%	NC500	1.46%	Expedia
17.25%	Discover Assynt	0.29%	Triposo
7.89%	Airbnb	39.18%	Google maps
29.53%	TripAdvisor	32.16%	WalkHighlands
2.34%	Scotland Welcomes you	1.75%	Venture North
15.2%	North West Highlands Geopark	31.29%	Other or None
11.11%	Coigach.com		

7. Which of the following mobile apps do you use when on holiday to learn about the area and activities?

54.21%	Google/Safari	2.36%	Weather
50.51%	Maps	2.02%	Lonely Planet/trip
28.96%	TripAdvisor	2.02%	Highland -offline guide
17.51%	VisitScotland	1.68%	maps.me
12.79%	NC500	1.01%	Booking.com
10.77%	Airbnb	3.03%	Other
6.40%	Strava	14.14%	None

8. Which of the following Social media apps do you use on Holiday? (Tick all that apply)

66.67%	Facebook
19.35%	Twitter
31.18%	Instagram
10.04%	Snapchat
40.14%	WhatsApp
10.39%	YouTube
1.08%	Tumblr
8.24%	Google+
15.05%	Other (please specify)

9. When on holiday how do you find out about local tours, attractions, activities etc

	Always	Occasionally	Never
Our Accommodation provider	23.44%	54.69%	21.88%
The Tourist Information Office	22.43%	59.56%	18.01%
Road signs	27.00%	65.40%	7.60%
Websites of local business	25.90%	58.96%	15.14%
Flyers/brochures	30.48%	60.97%	8.55%
Fellow visitors	21.54%	65.85%	12.60%
Mobile Apps	10.60%	46.08%	43.32%
Pre-downloaded information	18.88%	51.50%	29.61%
Tour book/Guide	26.56%	51.45%	21.99%

10. How likely would you use the following if available?

	Unlikely	Possibly	Definitely
App for Coigach and Assynt	32.67%	45.54%	21.78%
Downloadable PDFs	30.31%	54.01%	15.68%
Downloadable MP3s	70.30%	25.19%	4.51%
Printed Maps	7.90%	32.22%	59.88%
Printed leaflets	7.14%	48.14%	44.72%
QR codes on signs/routes	50.51%	33.79%	15.70%
Tourism Office	17.91%	50.34%	31.76%

Q11. On your visit how often were you able to access the internet?

42.41%	Daily/often
49.86%	Periodically
7.74%	Not at all

Q12 What is your HOME country?

Country	**Number of Visitors**	**Percentage of Visitors**
England	161	46.26%
Scotland	140	40.23%
USA	11	3.16%
Germany	8	2.30%
Canada	6	1.72%
Belgium	4	1.15%
Spain	3	0.86%
Sweden	3	0.86%
Australia	2	0.57%
France	2	0.57%
Italy	2	0.57%
Wales	2	0.57%
Ireland	1	0.29%
Nepal	1	0.29%
New Zealand	1	0.29%
Switzerland	1	0.29%

Appendix C

The Local Guide (Scotland)

The Local Guide LTDTravel & Local

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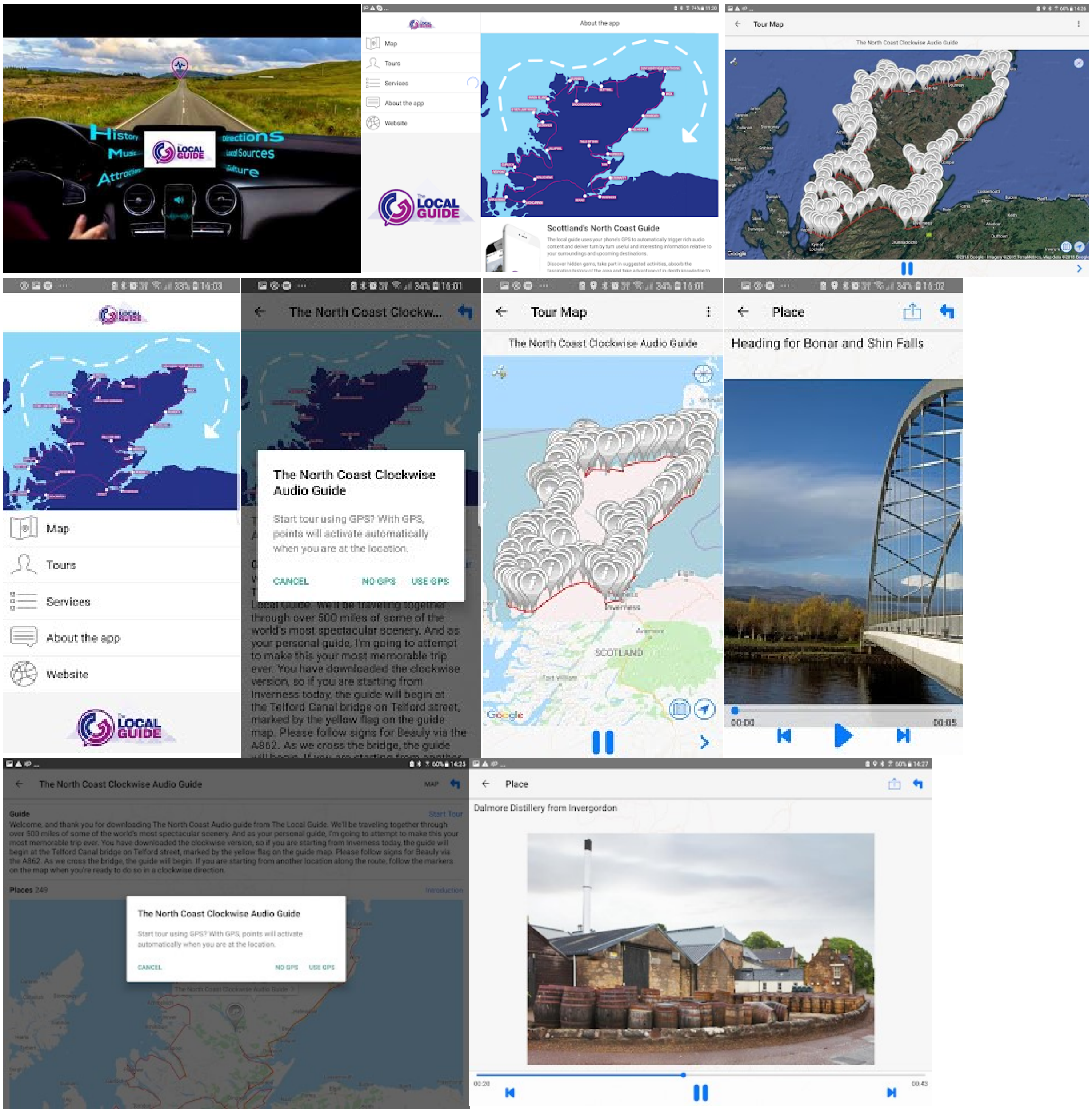

The Local Guide App is Scotland's leading unique driving audio tour guide and is the perfect companion for travellers exploring Scotland.
The App uses GPS technology to deliver a personal tour, based on your exact location, taking you to the very best each area has to offer. Delivered through the highest quality studio sound, you'll receive information on attractions, amenities, hidden gems, upcoming destinations, activities, the very best sight-seeing opportunities as well as guidance on how to get there, so you won't miss a thing.
You'll also hear stories and learn about the landscape, its people, the culture, and specific historical events, taking advantage of in-depth local knowledge to enhance your experience.
By the end of each tour, you will have a greater understanding of the land, the environment and the people who have shaped this wondrous land. Let us guide you through every twist and turn of one of the greatest road trips in the world.

Interview with Jason MacLeod 5 September 2018 jasonmacleod@the-local-guide.co.uk