

Oban Live: Visitor Survey and Economic Impact Report

Final Report

June 2016



Key Findings

- Building on the Decade event in 2015, Skerryvore led the organisation of Oban Live, which was held on 13th and 14th May 2015 at Oban's Mossfield Stadium. The two day event sold 4,800 official tickets, and was attended by 3,500 people on Friday 13th May and 4,700 people on Saturday 14th May.
- The analysis highlights that 64% (67.1% in 2015) of respondents were aged between 25 and 54 years old, and there were more people aged over 55 (21%) compared to those aged under 24 (12%) – which is broadly the same result as 2015 (21% / 11%). There were more people aged under 18 in 2016 (2.5%) than recorded in 2015 (1.4%).
- In terms of origin of survey respondents, once again there was an even split between people from the local area (Oban and surrounding areas) and people from elsewhere in Scotland but outside the Highlands and Islands. Visitors from elsewhere in the Highlands and Islands accounted for 16% of the sample (18% in 2015). 6.9% (6.3% in 2015) of the survey sample were from outside Scotland and trips from outside the UK accounted for 1.6% (1.8% in 2015) of the sample.
- It is clear that the vast majority of the festival goers visited the town as a direct result of Oban Live. Only 1.3% (14.3% in 2015) of respondents noted that Oban Live had little or no reason in their visit, i.e., 98.7% (85.7% in 2015) of attendees were in the area as a direct result of Oban Live.
- Respondents from outside Oban were also asked how familiar they were with Oban and if they had visited before. 8.5% (6.6% in 2015) of respondents were visiting for the first time, 12.4% (9.0% in 2015) hadn't been in the town for at least four years and 12.4% (13.5% in 2015) had visited in the last three years. This suggests that the event was even more successful in attracting new visitors to the area in 2016, as well as continuing to attract repeat visits from people who had not been to the area for a while.
- An even greater proportion of people stayed overnight in the area as part of their trip to the event in 2016, suggesting the event had a marked local economic impact. A wide range of accommodation types were used which suggests the local economic impact was spread across the full spectrum of accommodation businesses.
- 69.8% (62.2% in 2015) of attendees noted that the event was 'Excellent', this is an impressive uplift on an already popular event. Only 1.6% (1.8% in 2015) of respondents noted the event as 'Average' or 'Disappointing', considering the survey response rate was almost double in 2016 than 2015 this is once again an impressive result.
- There was a range of responses of how visitors found out about the festival, with the most commonly quoted response being 'social media', 'word of mouth' was also popular as was the 'event website'. These were even more popular sources in 2016 than recorded in 2015.
- 99% would like to see the event continued. As an annual event, 19.5% of respondent noted that they would prefer Oban Live to be held on a non-holiday weekend and 14.8% had a preference for a Public holiday weekend. However, overwhelmingly 65.7% had no preference. In terms for the best day format for Oban Live, the majority of respondents had a preference for continuing the event over a Friday and Saturday (69.6%).
- There was a high proportion of people claiming that the event had an 'Excellent' effect on the local area (64.3% compared to 59.7% in 2015). The growth in the economic significance of the event on the local area cannot be under-estimated. The event organisers should ensure the

critical success factors generating these levels of satisfaction and impact should be integrated into future events.

- In terms of grossing these results across the number of non-locals at the event (60.8% of the total 4,800 attendees or 2,918 visitors), the event attendees injected **£705,059** to the local economy. This figure cannot be reconciled with the figure from 2015 as the 2015 figure included the expenditure of local people. Assuming 98.7% (85.7% in 2015) of trips were as a direct result of Oban Live, the net direct economic impact can be valued at **£695,893**.
- Taking account of multiplier effect, the net additional economic impact of visitor spend as a result of Oban Live was in the region of **£1,092,552**. This is a similar figure to that achieved in 2015, however it should be noted that the 2016 only includes the expenditure of visitors and not local people, the expenditure of local people was appraised in 2015.

Introduction

This report presents an evaluation of Oban Live that was held in Oban on 13th and 14th May 2016. The event built on Skerryvore's Decade event which was held in May 2015.

Background

Building on the Decade event, Skerryvore led the organisation of Oban Live, which was held on 13th and 14th May 2015 at Oban's Mossfield Stadium. The two day event sold 4,800 official tickets, and was attended by 3,500 people on Friday 13th May and 4,700 people on Saturday 14th May.

The Visitor Survey

The visitor survey has been carried out to ascertain the impact of the Oban Live on the local economy. It will also help demonstrate the 'success factors' and 'lessons learned' to support the development of future events.

The online visitor survey was conducted over the period from Wednesday 24th May 2016 to Monday 6th June 2016. Attendees were encouraged to conduct the online survey through the official Facebook page. An Oban Live Hamper was offered as a prize to increase the response rate.

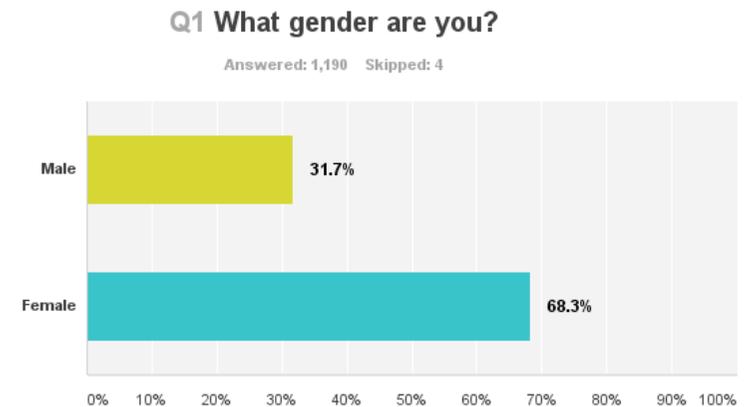
The survey was designed to capture information about the attendees' demographics, reasons for visiting, spend patterns and perceptions about the Oban Live.

In total 1,194 attendees completed the online survey. 1,194 completed surveys from a total population of 4,800 ticket holders gives a level of accuracy at the 9% confidence level of $\pm 2.1\%$.

A 25% response rate is a robust response rate and although the results are not entirely reflective of the entire population of festival attendees it provides an accurate reflection of views from those in attendance.

Gender

The split between male and female responses is shown below.



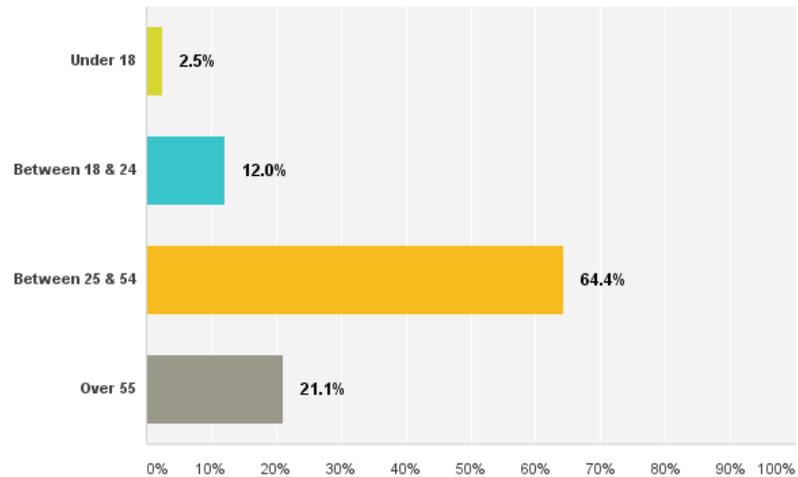
Although the gender split is rather surprising as the majority of surveys the split is more evenly balanced between males and females, however the breakdown is similar to Decade results from 2015 (29.3% / 70.7%)

Age Profile

The age profile of respondents is illustrated in the figure below. The analysis highlights that 64% (67.1% in 2015) of respondents were aged between 25 and 54 years old, and there were more people aged over 55 (21%) compared to those aged under 24 (12%) – which is broadly the same result as 2015 (21% / 11%). There were more people aged under 18 in 2016 (2.5%) than recorded in 2015 (1.4%).

Q2 What is your age range?

Answered: 1,191 Skipped: 3



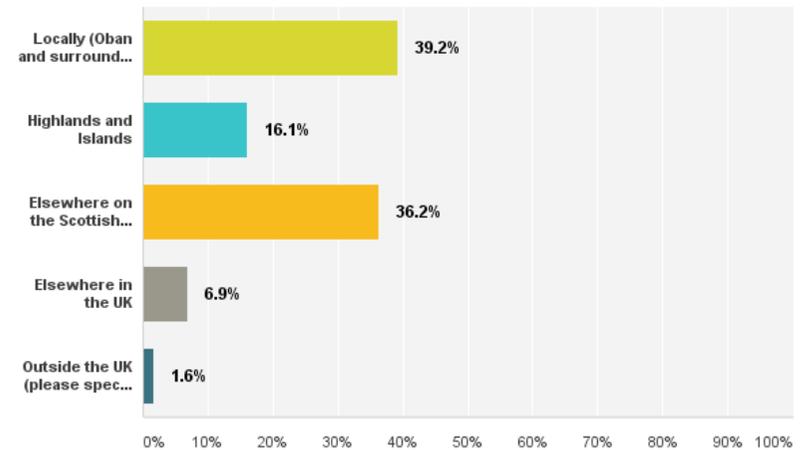
Origin

In terms of origin of survey respondents, once again there was an even split between people from the local area (Oban and surrounding areas) and people from elsewhere in Scotland but outside the Highlands and Islands. Visitors from elsewhere in the Highlands and Islands accounted for 16% of the sample (18% in 2015).

6.9% (6.3% in 2015) of the survey sample were from outside Scotland and trips from outside the UK accounted for 1.6% (1.8% in 2015) of the sample.

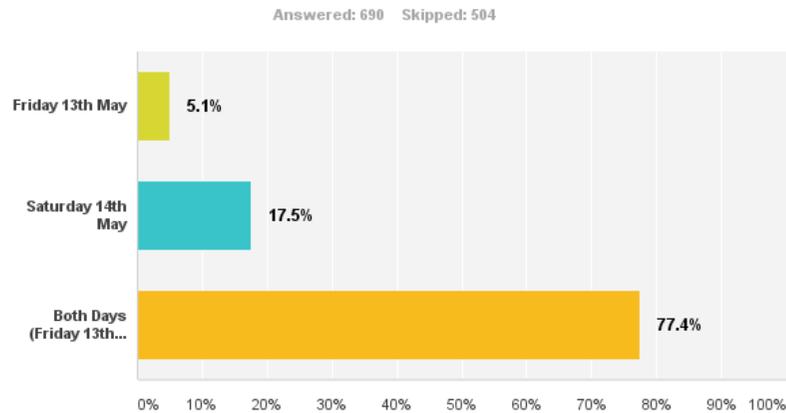
Q3 Where do you live?

Answered: 1,187 Skipped: 7



Visitors were asked which day(s) of Oban Live did they attend, the figure below shows that almost 80% attended both days, whilst 17.5% visited on the Saturday only and 5.1% on the Friday only.

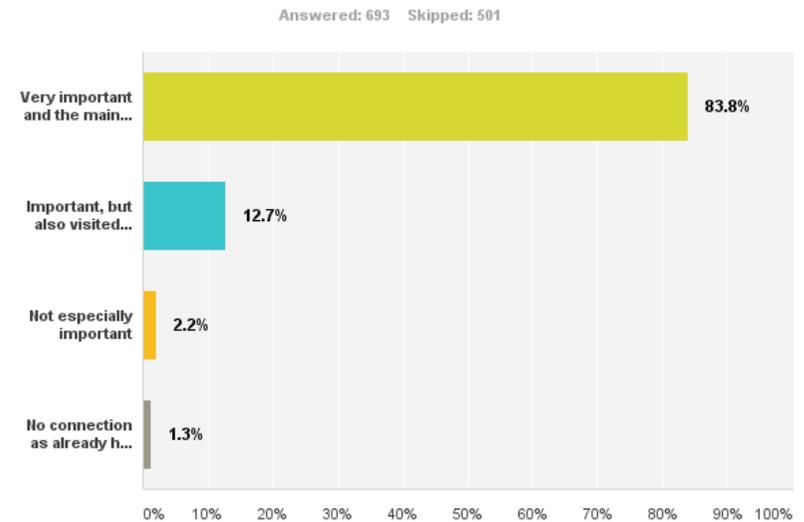
Q4 Which days did you attend at Oban Live?



Motivation

In order to ascertain the role of the festival in attracting visitors, survey respondents were asked about their motivation in visiting the area. 83.8% of survey respondents noted Oban Live was 'Very important' in their motivation to visit, this is significantly higher than the 58.4% recorded for SkerryvoreDecade in 2015.

Q5 How important was the opportunity to attend the Gig in your decision to visit Oban?



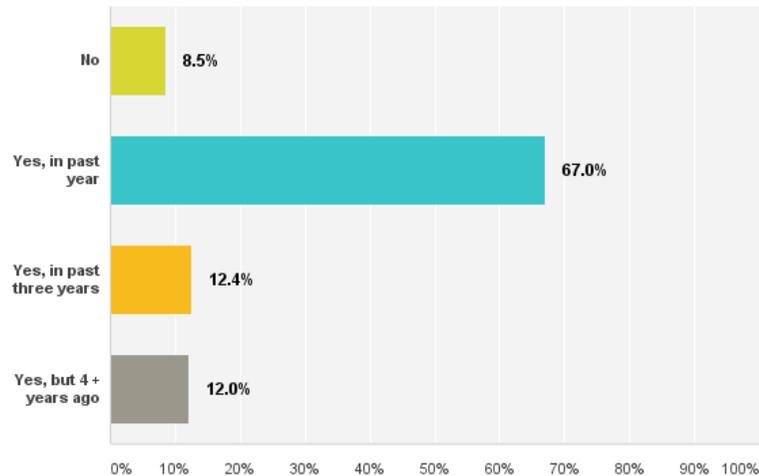
It is clear that the vast majority of the festival goers visited the town as a direct result of Oban Live. Only 1.3% (14.3% in 2015) of respondents noted that Oban Live had little or no reason in their visit, i.e., 98.7% (85.7% in 2015) of attendees were in the area as a direct result of Oban Live.

Knowledge of Oban

Respondents from outside Oban were also asked how familiar they were with Oban and if they had visited before. The figure below indicates 8.5% (6.6% in 2015) of respondents were visiting for the first time, 12.4% (9.0% in 2015) hadn't been in the town for at least four years and 12.4% (13.5% in 2015) had visited in the last three years.

Q6 Before this visit had you visited Oban before?

Answered: 691 Skipped: 503



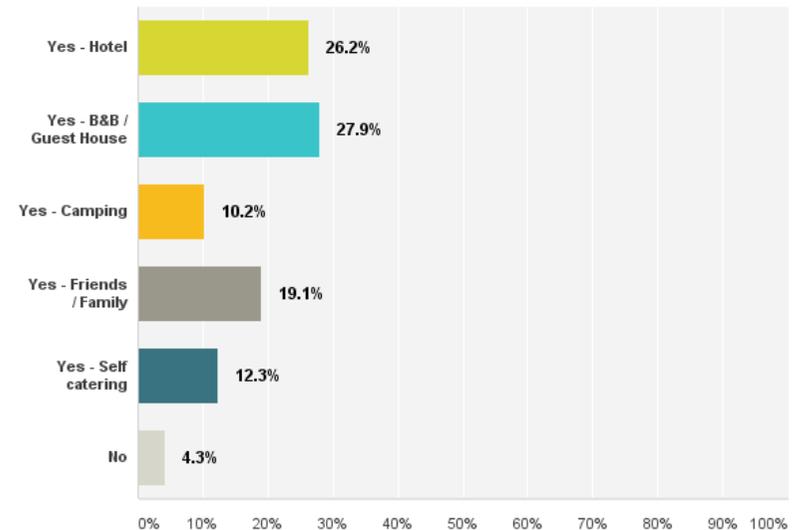
This suggests that the event was even more successful in attracting new visitors to the area in 2016, as well as continuing to attract repeat visits from people who had not been to the area for a while.

Accommodation Type

Visitors were also asked if they had stayed overnight as part of their visit to the event. Almost 95.7% (71.7% in 2015) of attendees had stayed overnight as a result of the being on in the area for the event. Hotels (26.2% in 2016 compared to 23.2% in 2015), B&Bs/Guest Houses (27.9% compared to 18.5% in 2015) and Friends/Family (19.1% compared to 17.2% in 2015) were again popular accommodation choices, and visitors also used local campsites (10.2% compared to 9.0% in 2015) and a few stayed in self-catering accommodation (4.3% compared to 3.8% in 2015).

Q7 Did you stay overnight, away from home, as part of your trip to the event?

Answered: 656 Skipped: 538

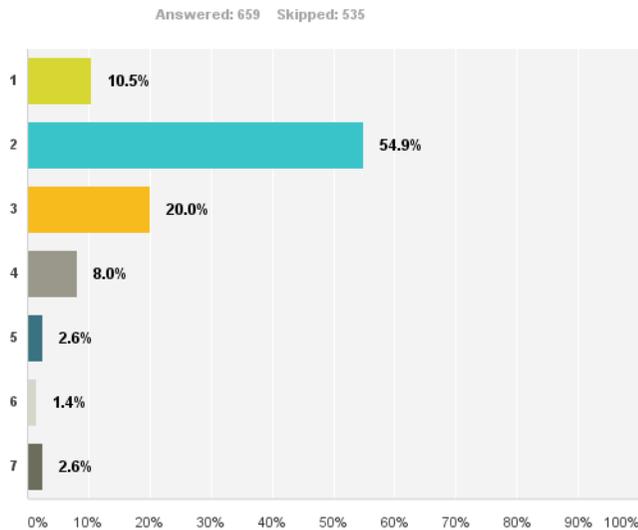


An even greater proportion of people stayed overnight in the area as part of their trip to the event in 2016, suggesting the event had a marked local economic impact. A wide range of accommodation types were used which suggests the local economic impact was spread across the full spectrum of accommodation businesses.

Overnight Trips

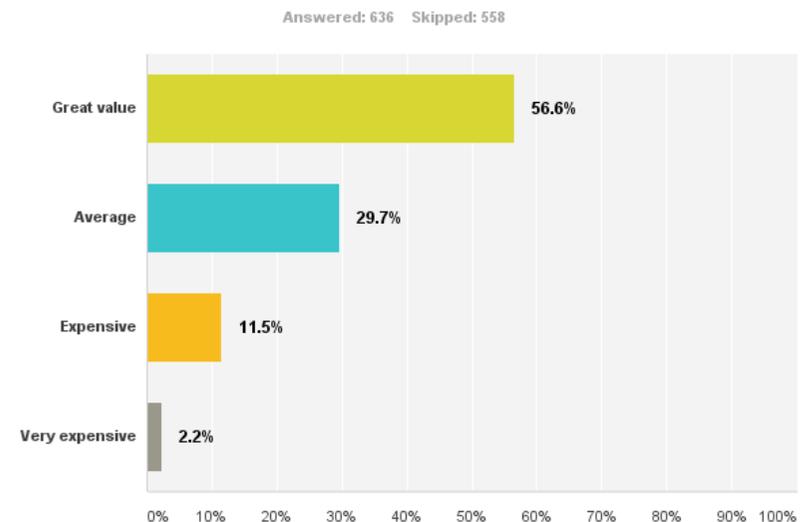
The table below indicates that around 10.5% (47.3% in 2015) of those staying overnight were staying for one night only, with around a 54.9% (compared to 33.3% in 2015) staying for two nights and 20.0% (10.3% in 2015) staying for three nights. This is an impressive uplift and although it is related to the event being a two-day event in 2016 it should still be recognised a key success.

Q8 How many nights were you away from home for?



In 2016, visitors to the area were asked how they would rate the value of their accommodation, the figure below highlights that 56.6% felt it was 'Great value' and 29.7% noted it as 'Average'. 11.5% felt the accommodation offering was 'Expensive' and 2.2% felt it was 'very Expensive'. This new question should be monitored in future years.

Q10 How would you rate the value of your accommodation?

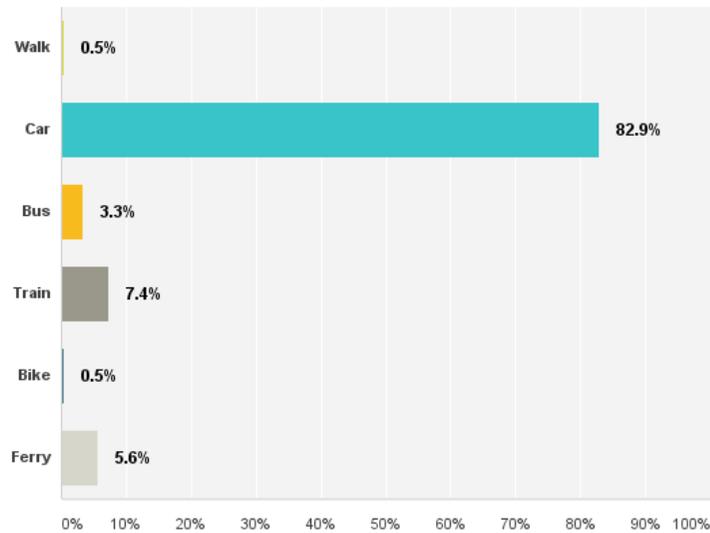


Travel and Transport

Visitors were asked how they travelled to the area, almost all respondents (82.9% compared to 70.9% in 2015) travelled by car, a number of other transport options were noted including, train (7.4% compared to 5.9% in 2015), ferry (5.6% compared to 7.2% in 2015) and bus (3.3% compared to 4.5% in 2015).

Q11 How did you travel to Oban for the event?

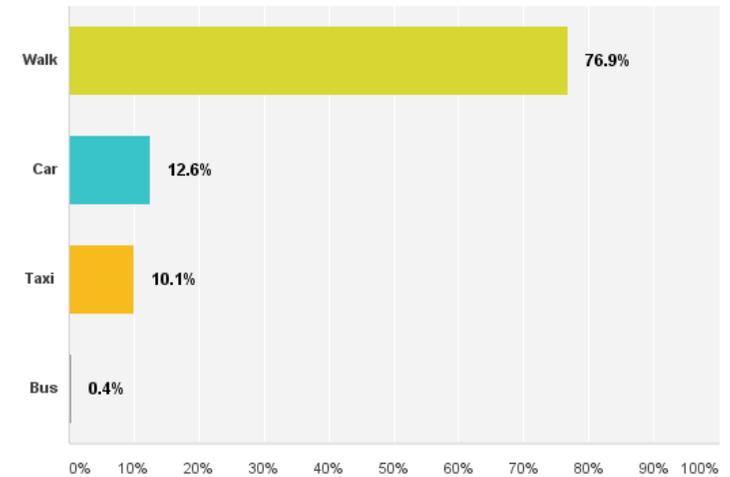
Answered: 666 Skipped: 528



On a related question visitors were asked how they had travelled to the festival site, and the figure below indicates that almost eight out of ten visitors walked to the site, this figure was very similar to that recorded in 2015. 12.6% (compared to 12.3% in 2015) access the site by car and 10.1% (8.1% in 2015) by a taxi. Only 0.4% (2.4%) used a bus.

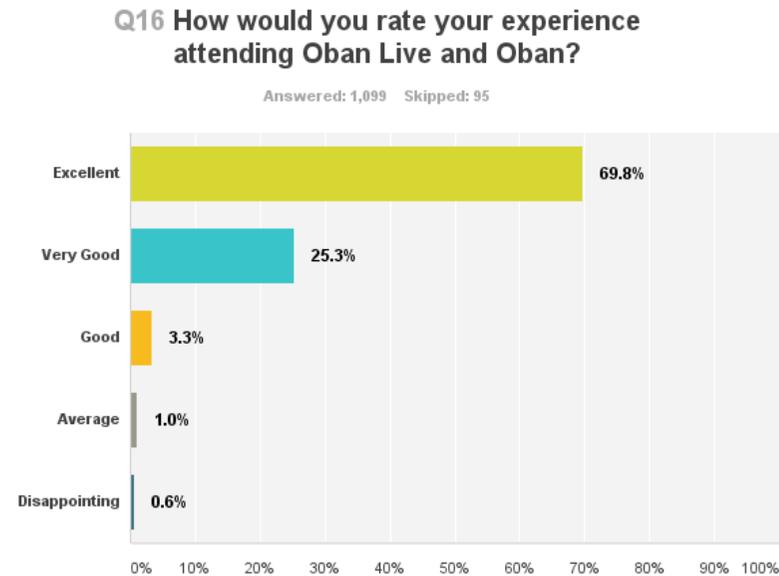
Q12 How did you travel to the festival site?

Answered: 684 Skipped: 510



Overall Experience

The following figure summarises the respondents overall experience about the visiting Oban and attending Oban Live.

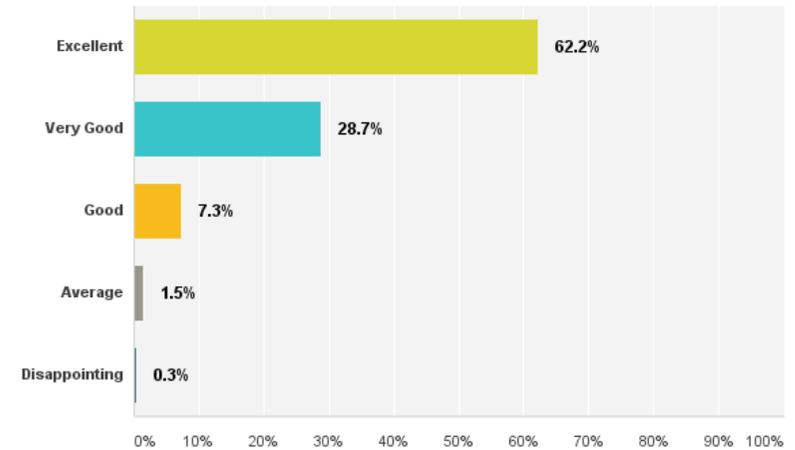


Visitors were also asked who their favourite act of Oban Live was, the responses are summarised in Appendix A.

Similarly, visitors were asked for general feedback on the event, and these are summarised in Appendix B.

Q15 How would you rate your experience attending Decade and Oban?

Answered: 616 Skipped: 51

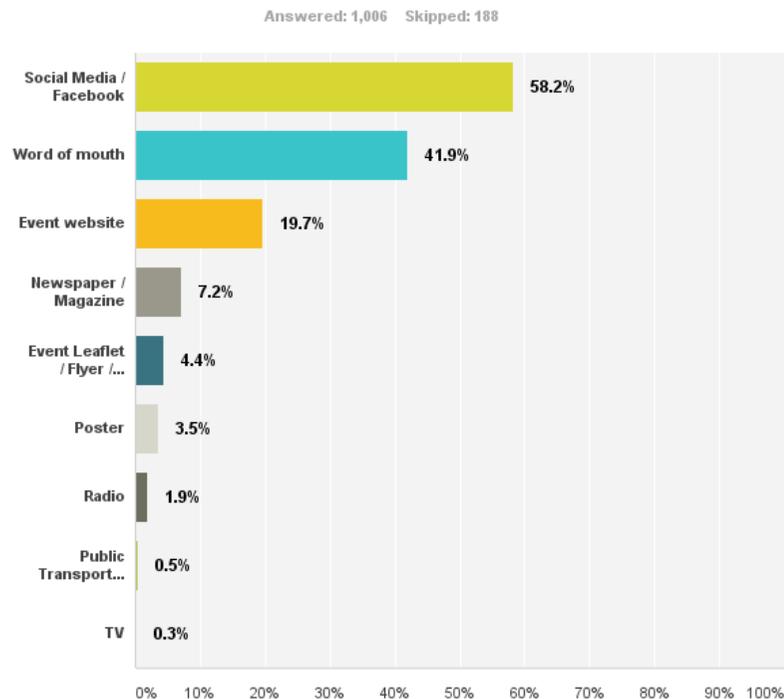


69.8% (62.2% in 2015) of attendees noted that the event was 'Excellent', this is an impressive uplift on an already popular event. Only 1.6% (1.8% in 2015) of respondents noted the event as 'Average' or 'Disappointing', considering the survey response rate was almost double in 2016 than 2015 this is once again an impressive result.

Marketing

Visitors were asked how they found out about Oban Live, the results are presented below. Respondents were able to list multiple responses.

Q17 Where did you hear about the Gig?

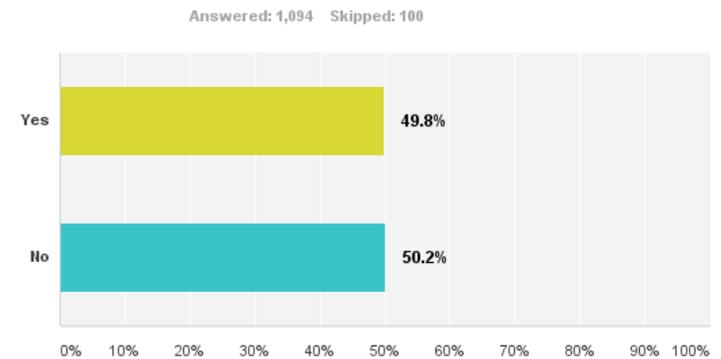


There was a range of responses of how visitors found out about the festival, with the most commonly quoted response being 'social media', 'word of mouth' was also popular as was the 'event website'. The ranking of these three most popular sources was identical to that recorded in 2015, however there had been slight increase in their reference in 2016 than in 2015 across all three sources.

SkerryvoreDecade and the Future of Oban Live

The figure below highlights that almost half the respondents had visited SkerryvoreDecade in 2015, the 2016 can be seen to have been successful in encouraging repeat visits as well as attracting a new audience.

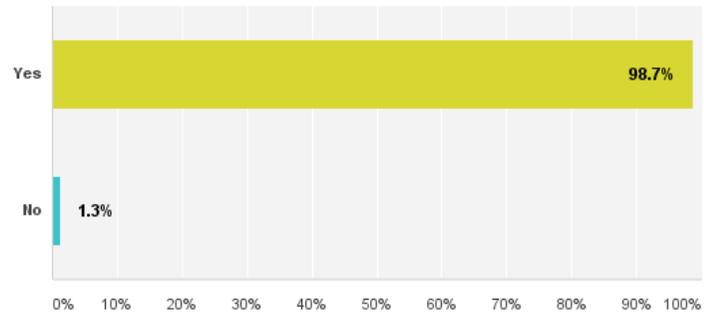
Q18 Did you also attend the Skerryvore Decade Concert in 2015?



Almost 99% of event goers would like to see the Oban Live continue as an annual event.

Q19 Would you like Oban Live to be an annual event?

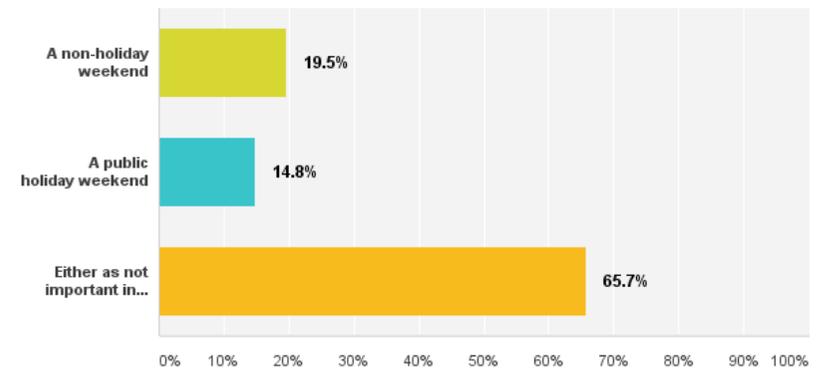
Answered: 1,095 Skipped: 99



As an annual event, 19.5% of respondent noted that they would prefer Oban Live to be held on a non-holiday weekend and 14.8% had a preference for a Public holiday weekend. However, overwhelmingly 65.7% had no preference.

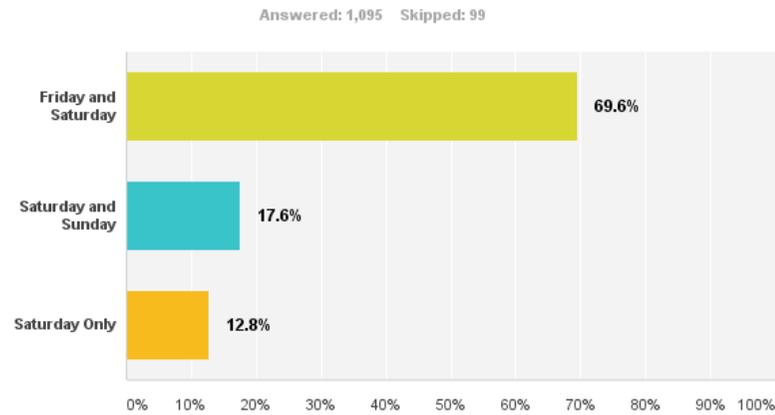
Q20 As an annual event, which weekend May do you think would be best for Oban Live?

Answered: 1,096 Skipped: 98



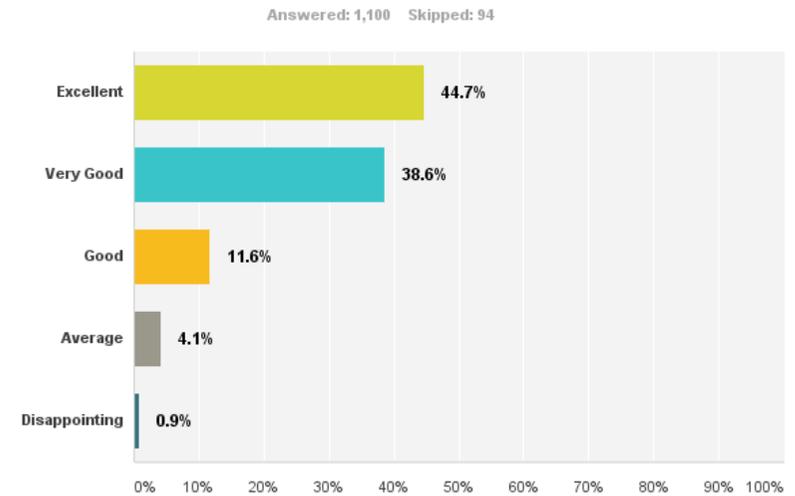
In terms for the best day format for Oban Live, the majority of respondents had a preference for continuing the event over a Friday and Saturday (69.6%). 17.6% had a preference for a weekend format, and only 12.8% had a preference for a Saturday only format.

Q21 What is the best day format for Oban Live?



When asked to rate the selection of vendors at the event, 44.7% noted the selection as 'Excellent', 38.6% as 'Very Good' and 11.6% as 'Good'. As a new survey question this should be monitored in future years.

Q23 How would you rate the selection of vendors at the event?

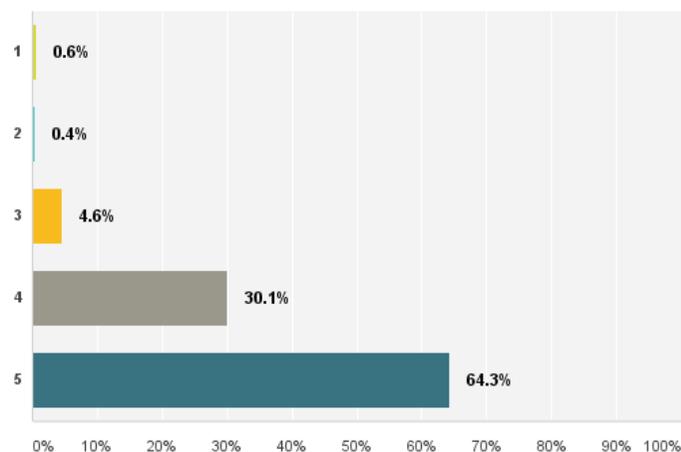


Impact of Oban Live on Local Area

Attendees were asked what type of impact Oban Live had on the local area.

Q24 On a scale of 1 (Bad) to 5 (Excellent), how do you feel the event has impacted on the local area?

Answered: 1,088 Skipped: 106



There was a high proportion of people claiming that the event had an 'Excellent' effect on the local area (64.3% compared to 59.7% in 2015). The growth in the economic significance of the event on the local area cannot be under-estimated. The event organisers should ensure the critical success factors generating these levels of satisfaction and impact should be integrated into future events.

Economic Impact Assessment

Importantly for economic impact analyses, visitors (non-locals) were asked about their spending patterns over the festival weekend. The figure highlights the average spend per person across key spend category per person and the proportion of visitors spending under each category, the expenditure of local people has not been considered in 2016:

- Accommodation: **£96.60**, across 77.5% of sample (£85.76 in 2015)
- Transport: **£36.76**, across 83.6% of sample (£33.16 in 2015)
- Food and Drink: **£84.92**, across 99.6% of sample (£57.01 in 2015)
- Other: **£55.84**, across 92.2% of sample (£47.43 in 2015)

In terms of grossing these results across the number of non-locals at the event (60.8% of the total 4,800 attendees or 2,918 visitors), the event attendees injected **£705,059** to the local economy. This figure cannot be reconciled with the figure from 2015 as the 2015 figure included the expenditure of local people.

Assuming 98.7% (85.7% in 2015) of trips were as a direct result of Oban Live, the **net direct economic impact** can be valued at **£695,893**.

The expenditure on staging the event will also have had two types of wider impact on the economy:

- Supplier effect: an increase in sales in a business will require it to purchase more supplies than it would have otherwise. A proportion of this 'knock-on' effect will benefit suppliers in the local economy; and
- Income effect: an increase in sales in a business will usually lead to either an increase in employment or an increase in incomes for those

already employed. A proportion of these increased incomes will be re-spent in the local economy.

The Scottish Tourism Multiplier Study (STMS) provides standard supplier and income multipliers for the tourism sector. This estimates that the combined supplier and income multiplier for a rural location is 1.57 at the local level. This suggests that the **net additional economic impact of visitor spend as a result of Oban Live was in the region of £1,092,552.**

This is a similar figure to that achieved in 2015, however it should be noted that the 2016 only includes the expenditure of visitors and not local people, the expenditure of local people was appraised in 2015.

Adopting standard spend:employment assumptions¹, where 1 tourism related job is safeguarded for every £54,000 of visitor spend, the event helped **safeguard 20 tourism related jobs.**

¹ VisitBritain, 'Tourism: Jobs and Growth - The economic contribution of the tourism economy', 2013

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