

***HIGHLANDS VISITOR
SURVEY, 1997:
HIGHLANDS OF SCOTLAND
TOURIST BOARD AREA
Final Report***

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Executive summary

- In total, 85% of visitors to the HoST area were away from home on holiday, some 7% were visiting friends and relatives on holiday, whilst 6% were on a day out from home;
- The majority of trips taken in the HoST area were not touring in nature: over half of those staying away from home were staying in one main location in the Highlands and taking day trips from there (52%). Around three in ten were staying in two or three locations in the Highlands (30%), whilst the remaining 18% were touring around, staying in more than three locations;
- The age profile of visitors to the HoST area is not too dissimilar to the profile in Scotland as a whole, although there are some subtle differences. A similar proportion of visitors were aged under 35 years (31% in the HoST area compared with 30% in Scotland), however a larger proportion of visitors to the HoST area were aged 55 years and over (28%) than in Scotland as a whole (22%). Conversely, smaller proportions of Highland visitors fall within the middle age categories of 35-54 years (42%) than in Scotland generally (48%);
- Visitors to the HoST area are very upmarket in their profile: around seven in every ten were ABC1s (70%). No information is available on the social class of overseas visitors to Scotland from the International Passenger Survey. However, the social class of UK visitors to the HoST area is fairly similar to that for Scotland as a whole: 63% of UK holiday trips in Scotland were taken by ABs (from the United Kingdom Tourism Survey), compared with 67% in the HoST area;
- Only 8% of visitors to the HoST area were visiting alone. Over half of the visitors to the area were with one other person (57%), and over a third (35%) had three or more people in their party. The average party size amongst visitors to the area was 2.74 people;
- The lower average party size amongst overseas visitors as opposed to Highland residents and visitors from other parts of Scotland would appear to be a reflection of the larger proportion of visitors who did not have any children with them. Only 13% of overseas visitors had children with them

compared with 33% of Highland visitors and 28% of other Scots. The most common party composition in the HoST area consisted of two adults and no children (56%);

- Around a third of visitors to the HoST area were from Scotland (32%), whilst four in every ten were from elsewhere in the United Kingdom (40%). The international appeal of the HoST area is demonstrated by the fact that over a quarter of visitors were from overseas locations (27%);
- As would be expected, many of the reasons for their visit provided by respondents in the HoST area related to aspects of the scenery. Whilst some described their prime motivation for visiting as having never been before or they had always wanted to visit, another large proportion were visiting because they had been before and knew the area;
- In general, two key influences emerged amongst visitors to the HoST area: a previous visit(s) to the area (54%), and advice from friends or relatives (34%). Tourist brochures and guide books were also important however, each of which were described as having had some influence on 15% and 13% of trips to the HoST area respectively. All other influences were mentioned by fewer than 10% of respondents, and the dominance of previous visits and advice indicates the important role played by “informal” information sources in influencing visits;
- In total 15% of those interviewed in the HoST area had been influenced to visit by tourist brochures. Tourist brochures were more influential in some markets than others: younger visitors were slightly more likely to have used them than older visitors (17% of those aged under 35 years as opposed to 11% of those aged 55+ years). Also, 25% of those on their first ever trip to the Highlands had been influenced by a tourist brochure as opposed to 11% of those who had been before;
- Typically, tourists in the HoST area were staying away from home in Scotland for 10.0 nights, in the Highlands for 7.1 nights, and in the local area for 4.0 nights. 96% of those who were away from home were staying overnight in the Highlands - only 4% were making day trips from other parts of Scotland. Also, four in every five of them (80%) were staying overnight in the local area in which they were interviewed;
- Visitors to Lochaber, Badenoch and Strathspey, Sutherland, Wester Ross and Caithness stayed in these areas longer than the average across the HoST

area, whereas visitors to Inverness, Loch Ness and Nairn, and Skye and Lochalsh stayed for a smaller amount of time;

- Just over one third of the visitors to the HoST area were on their first ever visit (35%), indicating a healthy mix of “new” visitors and loyal, repeat visitors. Indeed, over a quarter of those interviewed had made more than seven or eight trips to the Highlands in the previous ten years (26%);
- Over three in every five visitors to the HoST area were visiting the Inverness, Loch Ness and Nairn area on their trip (61%), making this the most popular region of the HoST area visited. Around half of the visitors went to Lochaber (50%), making this the second most popular area, followed by Skye and Lochalsh (39%) and Badenoch and Strathspey (33%);
- Amongst those who were staying at least one night in the Highlands, three areas were particularly popular, each stayed in by more than a quarter of visitors: Inverness Loch Ness and Nairn (36%), Lochaber (34%) and the Isle of Skye and Lochalsh (28%). Each of the other areas was stayed in by less than one visitor in every five to the HoST area;
- Around two thirds of visitors used their own car on their journey to the Highlands (64%), whilst a further 13% used a rental car. Coaches (8%), trains (6%) and planes (5%) were the only other forms of transport used by 5% or more of visitors to the area;
- Bed and breakfast establishments were the most popular forms of accommodation used by visitors to the HoST area (28%). Hotels and motels were next most popular, stayed in by around a quarter of overnight visitors (24%), followed by self-catering in flats, houses and cottages (15%) and tents (11%). All other forms of accommodation were used by less than one visitor in ten;
- Satisfaction levels with their accommodation were generally fairly high amongst those visitors who had stayed in commercial accommodation during their trip to the Highlands. Three in every five (59%) described the quality of service as “very good”, whilst a further one third (34%) described it as “good”. And 7% felt the service had been adequate. Encouragingly, less than 1% of respondents (n=16) described the quality of service as “poor” and only 3 respondents described the quality of service as “very poor”. Satisfaction levels with the facilities experienced in accommodation

were very slightly less positive than satisfaction with the service, although the differences were barely significant;

- Whilst three visitors in every five indicated that they had taken part in some sporting/outdoor activities during their trip to the HoST area (61%), almost all of them had taken part in some non-sporting activities (98%). The most common sporting activity was *low level walking* of between two and eight miles distance: almost half of the visitors to the HoST area had participated in this activity during their trip (48%) making this far and away the most popular sporting/outdoor activity. Hill walking and longer distance low level walking were the next most popular activities, undertaken by 12% of visitors. Cycling/mountain biking, golf, game fishing and mountaineering/rock climbing were the only other sporting activities undertaken by 5% or more visitors to the area.
- As might be expected, *general sightseeing and touring* was the most commonly cited non-sporting activity undertaken by visitors to the HoST area, carried out by around nine visitors in every ten (91%). Almost three in five (58%) went shopping during their visit to the Highlands, whilst visits to museums, galleries and heritage centres were made by more than four in ten visitors (41%). Four other non-sporting activities were undertaken by more than 10% of visitors: visits to wildlife attractions (25%), archaeological sites (17%), leisure centres and swimming pools (14%), and concerts/ceilidhs/theatre /cinema (11%);
- Satisfaction levels with attractions visited in the Highlands were generally quite high. Just under half (48%) described the quality of service as “very good”, whilst over four in ten (45%) described it as “good”. Only 5% described it as merely adequate, whilst 1% felt service had been “poor” in Highland attractions;
- Over half of the respondents had already visited a Tourist Information Centre (TIC) during their visit to the HoST area (57%). Amongst the 44% of visitors who had not visited a TIC on their trip, around a fifth of them (21%) intended to visit one at some stage, whereas almost three quarters (72%) had no intention of visiting a TIC. In total therefore, two thirds of visitors had either already visited or intended to visit a TIC on their trip (66%);
- Amongst those respondents who had used TICs in the HoST area, levels of satisfaction with both the quality of service and the quality of facilities

provided were high. In each case, around half described them as “very good” (51% and 49% respectively), whilst around four in ten described them as good (40% and 43%). Only 1% of TIC visitors described the service received and the facilities on offer as “poor” (19 respondents in each case);

- Levels of satisfaction with shops in the HoST area are noticeably lower than for many of the other types of establishments measured. Although only 2% described both the quality of service obtained and the quality of facilities received as “poor” and less than 1% described them as “very poor”, generally their satisfaction levels were very slightly lower than for accommodation, visitor attractions and TICs in the HoST area. Less than one third described either aspect of Highland shops as being “very good”, although the majority of respondents did describe both the quality of service (52%) and the quality of facilities (54%) as “good”;
- Over half of those interviewed in the HoST area did not believe the local bodies responsible for tourism could have done anything to improve their trip (52%). Amongst those who did think improvements could have been made, the range and variety of suggestions were very large: no single improvement was mentioned by more than 6% of visitors. Improvements to the signposting and the lack of tourist information were mentioned by 6% of visitors, whilst the costs and expense associated with a holiday in the area were mentioned by 5% as were improvements to the roads infrastructure;
- Typically, respondents in the HoST area spent £93 per day during their trip to the Highlands on themselves and others in their party. This averaged out at a typical spend of £43 per person per day. Accommodation spend accounted for the largest proportion of this expenditure (42%) followed by food and drink (23%);
- Typically, respondents spent around £660 during their trip to the HoST area on themselves and others in their party. This averaged out at a mean spend of just over £305 per person on their trip to the area;
- In terms of total trip spending per party, the average spend was £836. The highest spenders by some margin were those staying in self-catering establishments (£1,424), followed by overseas visitors (£1,035) and those who were on a touring holiday (£1,024). On the other hand, lowest spenders were Scots visitors (£671), C2DEs (£773), those aged under 35

years (£761) and those who were staying in hotels (£774) or who were camping/caravanning (£783).

A. Background and Methods

Background

With tourism accounting for around a fifth of the economy of the Highlands and Islands, the importance of this industry to the area is clear. Estimates from the United Kingdom Tourism Survey (UKTS) and the International Passenger Survey (IPS) suggest that in 1994, both UK and overseas tourists made over 2.7 million tourist trips to the area.

Highlands and Islands Enterprise (HIE) is responsible for both business development and tourism skills in the area, whilst the responsibility for marketing lies within the remit of **Highlands of Scotland Tourist Board (HoST)** and the **Scottish Tourist Board (STB)**. The **local authorities** in the area also have an involvement in tourism, both in the provision of visitor attractions and events, but also through their economic development departments.

All of these agencies have a clear need for comprehensive information regarding the **volume, value, profile** and **characteristics** of visitors coming to the Highlands and Islands. In the past, there has been a reliance on the main national surveys (UKTS and IPS) for such data along with occasional and ad hoc visitor surveys in some parts of the Highlands and Islands. In some areas however, no real visitor research has been undertaken.

Consequently, during 1996, Highlands and Islands Enterprise commissioned System Three to conduct a **Visitor Survey Method Study** to recommend the most appropriate series of methods for conducting visitor surveys throughout the Highlands and Islands. These recommendations have subsequently been adopted by HIE when conducting visitor surveys.

Taking this work forward, **Highlands and Islands Enterprise** together with the **Highland Council** and **Highlands of Scotland Tourist Board** commissioned System Three to conduct a major visitor survey throughout the Scottish Highlands during March to November of 1997. This series of surveys covered all parts of the mainland, but did not include the Western or Northern Isles or the Argyll area.

The main **objectives** of this study were as follows:

- produce estimates of volume and value of visitors to the Highlands as a whole, and at the local level;
- supply information about the visitors and their visit to guide future tourism policy decisions;
- provide baseline information, which can be, updated in future studies.

This report covers the main findings to have emerged from the surveys undertaken throughout the **Highlands of Scotland Tourist Board area** (HoST area). A further report has been prepared which describes the results for the Highlands as a whole. The difference between the two areas relates to Moray District, which is included in the latter report but excluded from the analysis contained in this report. In addition, area reports analysing the characteristics of visitors in each of the following areas: Caithness, Sutherland, Ross and Cromarty, Moray, Badenoch and Strathspey, Skye and Lochalsh, Inverness, Loch Ness and Nairn and Lochaber.

Definition of Visitors

The survey covered all visitors to the HoST area on a holiday trip, those visiting friends and relatives on holiday, those staying away from home overnight on business, and people on a day trip from home. Residents of the Highlands on a leisure day out were also included within the sampling framework on the basis that they were interviewed at locations popular with day visitors and tourists alike (visitor attractions, scenic sites and town centres). A maximum quota was used to ensure that Highland residents did not dominate the sample, although in the event, this was not an issue.

Survey Method

The main survey method used throughout the study period was a programme of **face-to-face interviews** with a representative sample of visitors to the HoST area.

The efficacy of this methodology for visitor surveys is dependent on the careful selection of the **interview locations**. It was vital at the outset that the choice of sites reflected those locations in the area most likely to be visited by visitors. It was important to ensure that the omission of one particular location(s) did not lead to the exclusion of a certain type of visitor from the sample. For the maximisation of the interviewer resources, it was also

important that the sites chosen as interview locations were all capable of sustaining an adequate throughput of visitors on a daily basis.

In total, some 2,998 interviews were undertaken throughout the HoST area during the March to November period at over 40 interview sites throughout the area. They are indicated below in Table A-1.

Table A-1 - Interview locations

Base: 2,998 interviews with visitors

	No. of Interviews		No. of Interviews
Skye and Lochalsh:		Lochaber (cont'd)	
Kyle of Lochalsh	100	Strontian	109
Eilan Donan Castle	96	Castle Tioram, Ardnamurchan	75
Portree Tourist Information Centre	95	Sutherland:	
Clan Donald Centre, Sleat	80	Durness Visitor Centre and TIC	79
Broadford town centre	60	Assynt Visitor Centre, Lochinver	48
Dunvegan Castle	46	Dunrobin Castle	32
Inverness, Loch Ness & Nairn:		Dornoch town centre	32
Culloden Visitor Centre	96	Strathnaver Museum and TIC	16
Inverness town centre	95	Falls of Shin Visitor Centre	16
Fort Augustus Abbey	93	Easter Ross:	
Cawdor Castle, Nairn	92	Strathpeffer village centre	90
Nairn town centre	90	Dingwall town centre	74
Drumnadrochit village	89	Chanonry Point, Fortrose	46
Badenoch & Strathspey:		Cromarty Court House	11
Aviemore	114	Wester Ross:	
Grantown on Spey town centre	110	Ullapool town centre	73
Speyside Heather Centre	100	Inverewe Gardens	32
Landmark Visitor Centre, Carrbridge	80	Torridon Visitor Centre	28
Cairngorm car park	79	Lochcarron TIC	26
Rothiemurchus Estate	51	Inverpolly National Nature Reserve	16
Waltzing Waters	48	Gairloch - car park and harbour	9
Ralia	8	Caithness:	
Lochaber:		Thurso TIC, Dunnet Bay	62
Fort William town centre	139	John O'Groats	49
Aonach Mor car park	129	Caithness Glass, Wick	48
Glencoe Visitor Centre	126	Dunbeath Heritage Centre	11

Each interview location was carefully chosen and a number of criteria were taken into account including:

- each offered a position which would intercept visitors as they leave a location and which would cause the minimum disruption to the throughput of visitors to the location
- where possible, there was a position which afforded the opportunity for the interviewer and respondent to sit down for the duration of the interview, and if possible, a position which provided some protection from the weather.

In some potential interview locations, such as town centre sites (e.g. Kyle of Lochalsh and Aviemore), intercepting visitors as they passed a specified point replaced the requirement to make contact as they leave an interview location.

Respondents were selected on the basis of the **next person to leave**, or pass the interviewer on completion of the previous interview. Such an approach ensures the random selection of respondents whilst maximising the interviewer resource. In those situations where a family or group of people passed the interviewer together, the "**next birthday**" rule was applied to maintain this random selection procedure as it would be inappropriate for the oldest member of the party to always assume responsibility for the conduct of the interview.

The sample of **2,998 completed interviews** throughout the HoST area represents a large and very robust sample for analysis of the characteristics of visits made during 1997: at the 95% levels of confidence, results are accurate to plus or minus 1.8%. The interviews were conducted throughout the March to November period, taking account of the following factors:

- survey days were rotated across the various days of the week;
- survey days were rotated across the various weeks of the month;
- interviews were conducted at various times of the day between 10am and 8pm.

The daily and monthly breakdown of interviews undertaken is indicated below:

Table A-2 - Day and Month of Interviews (%)

Base: 2,998 interviews in the Highlands of Scotland Tourist Board area

	Interviews undertaken		Interviews undertaken
Monday	12	March/April	4
Tuesday	12	May	7
Wednesday	16	June	12
Thursday	13	July	26
Friday	12	August	24
Saturday	19	September	13
Sunday	17	October	8
		November	4
Total	100	Total	100

A large proportion of the interviews were conducted at the weekend (36%), reflecting the large number of visits made to tourist attractions and sites at that time of the week. Similarly, around half of the interviews were conducted during July and August (50%) to reflect the seasonal nature of tourism in the Highlands. Just under a quarter of the interviews were undertaken during the March/April/May and October/November periods (23%) meaning that some seasonal analysis can be undertaken.

An interpretation and analysis of the full results and findings to emerge from the interviews in the HoST area follows in Section B.

B. Main Findings

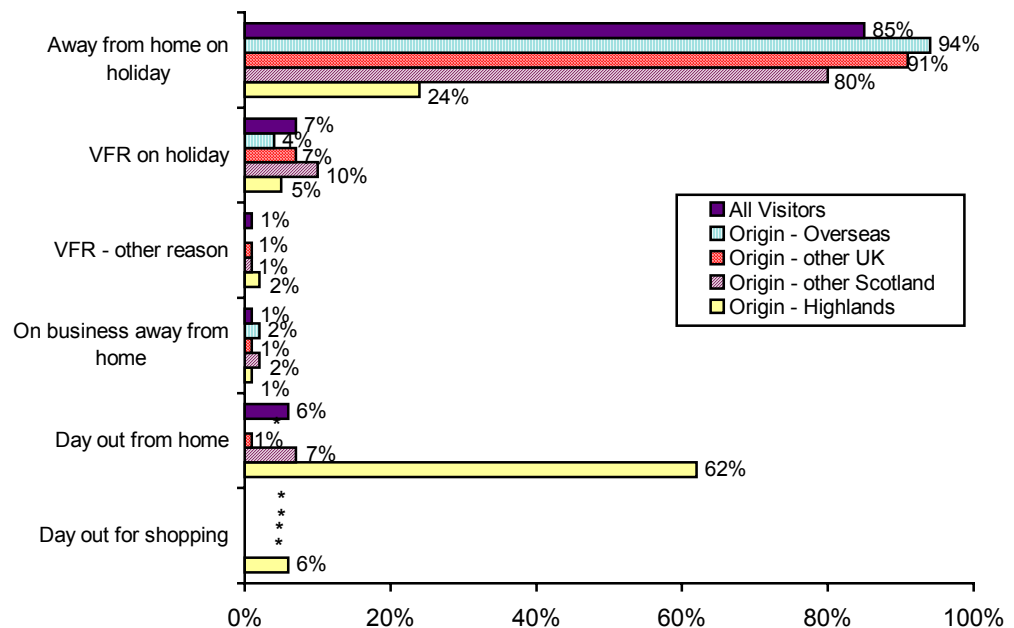
Reasons for Visiting

Purpose of Visit

The overwhelming majority of visitors to the HoST area were staying away from home overnight (93%). The main types of trips taken are summarised in Figure B-1 below, along with an analysis by origin of visitors:

Figure B-1 - Purpose of Visit

Base: 2,998 visitors to the HoST area



* - Less than 0.5%

In total, 85% of visitors to the HoST area were away from home on holiday, some 7% were visiting friends and relatives on holiday, whilst 6% were on a day out from home. There were some big variations in these proportions amongst visitors from different origins however:

- three visitors in five who lived in the Highlands were on a day out from home (62%): only 24% were staying away from home on holiday;

- visitors from other parts of Scotland were rather more likely than average to be visiting friends and relatives on holiday (10%) or to be on a day trip (7%)
- overseas visitors and those from other parts of the UK were rather more likely to be away from home on holiday (94% and 91% respectively)

There were some other variations in the purpose of trip profiles to the HoST area amongst the different market segments:

- a higher proportion of C2DEs were on a day trip from home (10%), than ABC1s (4%). This is a reflection of their origin however: a high proportion of ABC1s were from overseas countries of origin;
- certain parts of the HoST area were more popular as day trip destinations: 13% of visitors to Badenoch and Strathspey were on a day trip from home. Conversely, Wester Ross and Skye and Lochalsh were rather more popular as holiday destinations: 95% and 92% respectively were on holiday;
- there were some seasonal variations in the types of visitor to the area: The July to September period accounted for the highest proportion of holiday visitors (87%), whereas a slightly smaller proportion (81%) of visitors in March, April, October and November were on holiday;
- likelihood to class their trip as a holiday tended to increase by length of stay: 86% of those on a 1-3 night break in the HoST area were on holiday, compared with 92% of those staying for four nights or more;
- whilst 96% of those who were touring around, staying in three or more locations were on holiday, the corresponding figure for those staying in the one location was 86%;
- Those on a repeat visit were less likely to be on holiday (86%) than first time visitors to the HoST area (95%).

Type of Stay

Those respondents staying away from home were asked to indicate the extent to which their visit was touring in nature as opposed to a “centred” trip (see Table B-1 below):

Table B-1 - Type of Stay in the HoST area (%)

Base: 2,936 visitors to the HoST area staying away from home

	Highland visitors to the HoST area	Scots visitors to the HoST area	Other UK visitors to the HoST area	Overseas visitors to the HoST area	Overnight visitors to the HoST area
- Staying in one main location in the Highlands and taking day trips	69	71	60	23	52
- Staying in 2 or 3 locations during visit to the Highlands	23	21	27	42	30
- Touring around the Highlands, staying in more than 3 locations	4	8	13	34	18
Total:	100	100	100	100	100

The majority of trips taken in the HoST area were not touring in nature: over half of those staying away from home were staying in one main location in the Highlands and taking day trips from there (52%). Around three in ten were staying in two or three locations in the Highlands (30%), whilst the remaining 18% were touring around, staying in more than three locations.

There were some major variations in these figures amongst visitors from different regions of origin. Overseas visitors were the group most likely to be on a touring holiday: over a third were staying in more than three locations, whilst only 23% were staying in the one place. Scots visitors on the other hand were significantly more likely to be on a centred trip, with 71% of them staying in the one location within the Highlands. Visitors from other parts of the UK were less likely to be on a touring holiday than overseas visitors, but more likely than Scots.

There were also some variations in the likelihood to go touring across different parts of the HoST area. Some 28% and 26% of visitors to Skye and Sutherland respectively were on a touring trip around three or more locations, a significantly higher proportion than in the HoST area as a whole (18%). Conversely, Badenoch and Strathspey was much more of a “single location destination”: 77% of visitors to that area were only staying there.

There were also some major variations in the types of trips taken by different market segments:

- *Age:* those aged 55 years and over were more likely to be on a one centred holiday than those under the age of 35 years: 61% of those aged 55+ years were staying in the one location, compared with 41% of the younger age group. Conversely, the under 35s were more likely to be touring: 24% were staying in more than three locations compared to 14% of the over 55s;
- *Social Class:* those visitors in social class grouping C2DE were rather more likely to be staying in the one location than ABC1s (60% and 49% respectively);
- *Seasonal variations:* visits made during the main summer season from May to September were rather more likely to be touring in nature than at other times of the year: 19% of visitors were touring the Highlands during the summer compared with 10% of visitors in March, April, October and November. Visits to the one location were much more common during these off-peak months (65%);
- *Accommodation used:* those visitors who were staying in self-catering accommodation were much more likely to be based in the one location (82%). Conversely, those staying in bed and breakfast establishments and those who were caravanning/camping were much more likely to be on a touring holiday: 30% and 29% respectively were staying in more than three locations;
- *Length of Stay:* those staying in the HoST area for three nights or less were rather more likely to be staying in only one location (66%), than those who were in the HoST area for more than a week (38%). These latter groups were more likely to be on a touring holiday than those staying for 1-3 nights - 33% and 3% respectively.

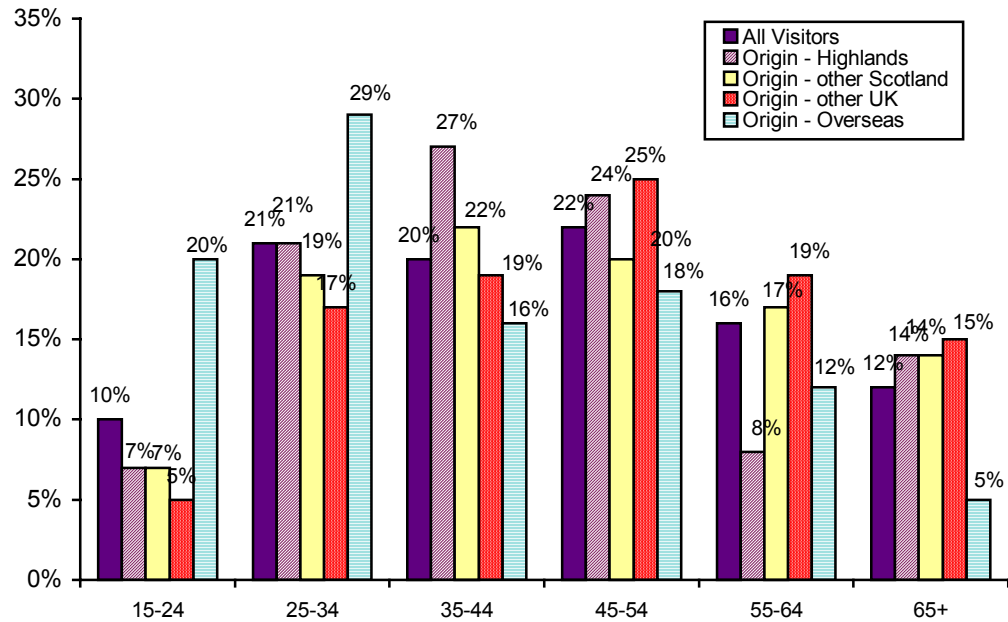
Visitor Profile

Age

The age groups of visitors to the HoST area are indicated in Figure B-2 below:

Figure B-2 - Age of Visitors

Base: 2,998 visitors to the HoST area



It is possible to compare the ages of Highland visitors obtained in this survey with the published age profile of visitors to Scotland taken from the 1996 International Passenger Survey and United Kingdom Tourism Survey. The age profile of visitors to the HoST area is not too dissimilar to the profile in Scotland as a whole, although there are some subtle differences. A similar proportion of visitors were aged under 35 years (31% in the HoST area compared with 30% in Scotland), however a larger proportion of visitors to the HoST area were aged 55 years and over (28%) than in Scotland as a whole (22%). Conversely, smaller proportions of Highland visitors fall within the middle age categories of 35-54 years (42%) than in Scotland generally (48%). This is reflected in the relatively small proportion of visitors to the HoST area who could be defined as the family market (see Table B-2).

There are some very different age profiles evident amongst the different regions of origin. Residents of the Highlands who were interviewed as “visitors” were more likely to fall within the middle age categories (51% were aged 35-54). On the other hand, overseas visitors were generally younger than

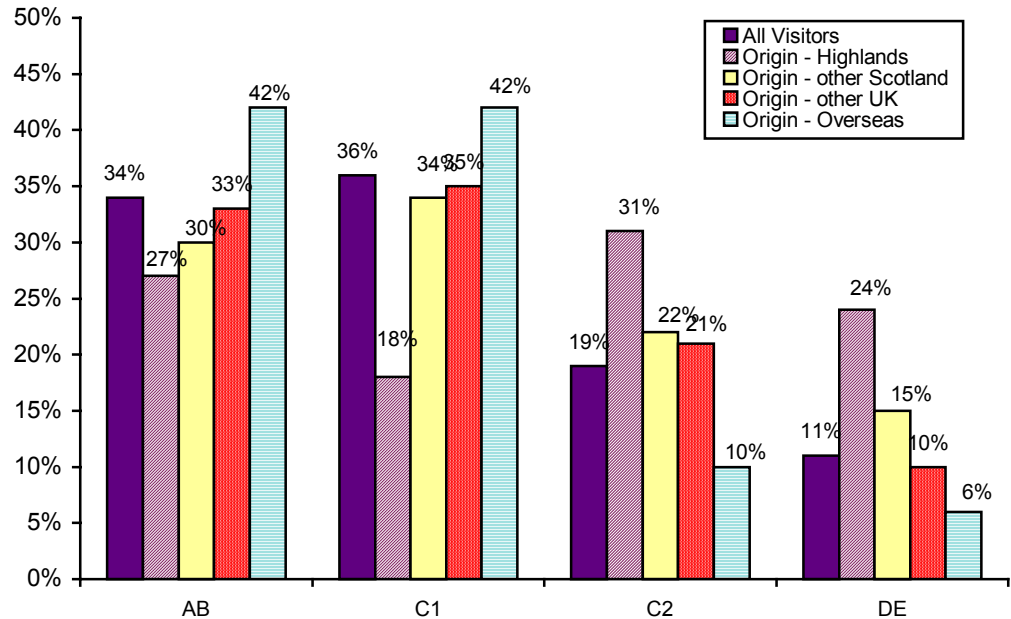
average (49% were under the age of 35 years), whilst visitors from Scotland and other parts of the UK tended to be rather older: in each case, over three in ten were aged 55 years and over (31% and 33% respectively).

There were some significant variations in the age profiles for different markets segments visiting the HoST area:

- *Social Class:* ABC1s were more likely to be under the age of 35 (32%) than C2DEs (27%);
- *Area visited:* visitors to Skye and Lochalsh and the Inverness, Loch Ness and Nairn area were slightly younger than average: 39% and 37% of visitors to these two areas respectively were aged under 35 years. Conversely, visitors to the Easter Ross, and Badenoch and Strathspey areas were more likely to be older on average (39%, and 34% respectively were aged 55+ years);
- *Type of trip:* a larger proportion of those on a touring trip to the Highlands were under 35 years (41%) than those staying in the one location (24%). Conversely, one centre holidays were rather more popular amongst those aged 55+ years (33%);
- *Accommodation:* visitors who were camping/caravanning or who were staying in bed and breakfast establishments tended to be younger than those staying in hotels (37%, 38% and 19% respectively, were aged under 35);
- *Previous visits:* those on their first ever trip to the HoST area were more likely to be under the age of 35 years than those who had been before (45% and 23% respectively).

*Social Class***Figure B-3 - Social Class of visitors**

Base: 2,998 visitors to the HoST area



A definition of social class categories is contained in Appendix 1.

Visitors to the HoST area are very upmarket in their profile: around seven in every ten were ABC1s (70%). No information is available on the social class of overseas visitors to Scotland from the International Passenger Survey. However, the social class of UK visitors to the HoST area is fairly similar to that for Scotland as a whole: 63% of UK holiday trips in Scotland were taken by ABs (from the United Kingdom Tourism Survey), compared with 67% in the HoST area.

The highest proportion of ABs and C1s were found amongst overseas visitors to the HoST area: over eight in ten overseas visitors were in either of these two more upmarket categories (84%), whilst only 16% were C2DEs. On the other hand, residents of the Highlands who were interviewed were rather more likely to be C2DEs (55%) than ABC1s (45%).

The following categories of visitor were rather **more likely to be ABC1s** (70% overall):

- visitors under the age of 35 years (73%);
- visitors to Skye and Lochalsh (76%), Sutherland (75%), Wester Ross (75%) and Caithness (74%);
- those interviewed between March and June (75%);
- those who were visiting the HoST area for the first time (76%);
- those who were on a touring holiday (77%);
- visitors staying in bed and breakfast establishments (76%).

Conversely, the following types of visitor were rather **more likely to be C2DEs** (30% overall):

- visitors aged 55 years and over (35%);
- visitors to Badenoch and Strathspey (38%), Easter Ross (36%), and Inverness, Loch Ness and Nairn (33%);
- those interviewed between July and September (32%);
- those who were staying in the one location (32%);
- visitors who were camping and caravanning (34%).

Party size and composition

Only 8% of visitors to the HoST area were visiting alone. Over half of the visitors to the area were with one other person (57%), and over a third (35%) had three or more people in their party. The average party size amongst visitors to the area was **2.74 people**, although this party size varied considerably across the different regions of the HoST area:

- | | | | |
|---------------------------------|-------------|--------------------|-------------|
| • Badenoch & Strathspey: | 3.15 people | • Sutherland: | 2.56 people |
| • Inverness, Loch Ness & Nairn: | 2.92 people | • Easter Ross: | 2.54 people |
| • Caithness: | 2.68 people | • Skye & Lochalsh: | 2.43 people |
| • Lochaber: | 2.67 people | • Wester Ross: | 2.36 people |

Visitors aged 35-44 years had slightly larger party sizes (2.96 people), probably a reflection of there being more family groups within this age category, as were C2DEs (2.82), those staying in the one location (3.00), and those staying in self-catering accommodation (3.65). Those on a touring holiday were in smaller parties (2.25 people) as were those staying in hotels and guesthouses and B&B establishments (2.39 and 2.38 respectively).

Party sizes tended to decrease by distance travelled: those visiting from the Highlands and from other parts of Scotland tended to be in slightly larger parties (2.98 and 2.93 people respectively). On the other hand, visitors from other parts of the UK were in groups of 2.70 people, and those from overseas were in even smaller groups (2.55 people).

The composition of these groups is illustrated below:

Table B-2 - Party Composition

Base: 2,998 visitors to the HoST area

	Highland visitors to HoST area	Scots visitors to HoST area	Other UK visitors to HoST area	Overseas visitors to HoST area	All Visitors
Adults, no children under 18 years	68	72	79	88	79
- 1 adult, no children under 18 years	7	6	8	10	8
- 2 adults, no children under 18 years	45	53	56	60	56
- over 2 adults, no children under 18	14	13	15	17	15
Adults with children under 18 years	33	28	21	13	21
Total:	100	100	100	100	100

The lower average party size amongst overseas visitors as opposed to Highland residents and visitors from other parts of Scotland would appear to be a reflection of the larger proportion of visitors who did not have any children with them. Only 13% of overseas visitors had children with them compared with 33% of Highland visitors and 28% of other Scots. The most common party composition in the HoST area consisted of two adults and no children (56%).

Origin of Visitors

The origin of visitors to the HoST area is indicated in Table B-3 below:

Table B-3 - Origin of Visitors

Base: 2,998 visitors to the HoST area

	Holiday visitors	Day Visitors	All visitors
Scotland	26	94	32
- Glasgow and Clyde Valley	8	6	7
- Aberdeen & Grampian	4	15	5
- Edinburgh & Lothian	5	2	5
- Tayside	2	4	3
- Inverness, Loch Ness & Nairn	*	23	2
- Moray	*	11	1
- Other Scotland	7	33	9
England	43	4	40
- South East	15	1	14
- North	10	2	9
- Midlands	7	*	7
- North West	7	*	7
- South West	3	-	3
Other UK	2	*	2
Overseas	30	-	27
- USA	5	-	5
- Germany	6	-	5
- Australia	3	-	3
- Netherlands	2	-	2
- Canada	2	-	2
- France	2	-	2
- Other overseas	10	-	8
Total:	100	100	100

* Less than 0.5%

- Nil respondents

Around a third of visitors to the HoST area were from Scotland (32%), whilst four in every ten were from elsewhere in the United Kingdom (40%). The international appeal of the HoST area is demonstrated by the fact that over a quarter of visitors were from overseas locations (27%).

There are three key day trip markets for the HoST area: just under a quarter of day trippers were from the Inverness, Loch Ness and Nairn area (23%), 15% were from Grampian, and 11% were from Moray.

When overnight holiday visitors are analysed separately, as would be expected, the proportion of overseas visitors increases even further, with some three in ten holiday visitors coming from overseas countries of origin (30%).

In terms of individual countries of origin, the United States of America and Germany were the two key overseas markets, each accounting for 6% of holiday visitors. European countries accounted for 15% of holiday visitors to the HoST area, whilst other parts of the world made up the remaining 15% of overseas visitors. The main population centre of the South East of England was the biggest regional market for the HoST area, 15% of visitors coming from there. Combined, the North and North West of England were also particularly important, accounting for 17% of visitors. Scotland accounted for 26% of holiday visitors, with the three main cities accounting for the largest proportion of visitors: 8%, 5% and 4% of visitors respectively were from the Glasgow, Edinburgh and Aberdeen areas.

By concentrating primarily on overnight holiday visitors to the area, it is possible to compare the profile of visitors to the HoST area with the typical origin profile for Scotland as a whole (from UKTS and IPS). Typically, English residents account for around 40% of holidays in Scotland, a similar proportion are Scots, 3% are from Wales and Northern Ireland, and the remaining 15% are from overseas. It must be borne in mind that the Highland Visitors Survey only covered the late-March to November period as opposed to the full-year coverage of IPS and UKTS. However, it is very clear that the HoST area attracted a significantly larger share of overseas visitors and a correspondingly smaller proportion of Scots visitors than the national average.

Motivations for visiting

Main reasons for visiting the Highlands

Respondents were asked to indicate what their main reasons had been for visiting the Highlands. Asked in an open-ended format, this question resulted in a wide variety of answers, and those mentioned by 4% or more of all respondents are outlined in Table B-4 below:

Table B-4 - Main reasons for visiting the Highlands (%)

Base: 2,998 visitors to the HoST area

	Highland visitors to HoST area	Scots visitors to HoST area	Other UK visitors to HoST area	Overseas visitors to HoST area	All Visitors
- Scenery/scenic views/beauty/unspoilt	8	17	25	28	23
- Been before/know area	8	23	22	9	18
- Never been before/always wanted to come	1	8	17	19	14
- Peace & quiet/tranquillity/relaxing	6	16	15	11	14
- General sightseeing/day out	20	9	12	14	12
- Mountains and hills/landscape	3	9	11	19	12
- Like area/enjoy it	4	16	15	4	12
- Family/friends/connections in the area	11	15	12	7	12
- Any mentions of specific attractions	15	8	6	5	7
- Walks/walking opportunities	5	8	6	5	6
- Wildlife/nature/flora and fauna	5	3	4	12	6
- House here/time-share	16	6	5	4	6
- Lochs/Loch Ness	4	3	4	6	4
- Because of the people/friendly people	1	4	5	4	4
- Any mention of specific towns/villages	10	5	3	3	4
Total:	100	100	100	100	100

As would be expected, many of the reasons for their visit provided by respondents in the HoST area related to aspects of the scenery. Whilst some described their prime motivation for visiting as having never been before or they had always wanted to visit, another large proportion were visiting because they had been before and knew the area.

There were some marked variations in the main reasons for visiting the Highlands provided by visitors from different origins:

- *Highland residents* were rather more likely to mention general sightseeing (20%), specific attractions (15%), towns and villages (10%) or the fact that they lived in the area (16%) as being main reasons for visiting.
- *Other Scots visitors* were more likely than average to mention the fact that they had been in the area before (23%), that they liked the area (16%), or that they had family or friends in the area (15%). As with Highland residents, they were rather less likely to overtly mention the scenery of the area as a prime reason for visiting.
- *Visitors from other parts of the United Kingdom* were rather more likely than the average to mention the scenery (25%), previous visits (22%) and the fact that they liked the area (15%) as main reasons for visiting.
- *Overseas visitors* were primarily attracted to the Highlands by the scenery: 28% mentioned the scenery generally, whilst 19% mentioned the mountains and hills, and 12% mentioned the wildlife and flora and fauna.

In terms of the three most frequently mentioned reasons for visiting the Highlands, in addition to variations by origin, there were some other variations across different markets:

- *Scenery/scenic views/beauty/unspoilt (23% overall)*: more important amongst those aged under 35 (25%) than those aged over 55 (19%); more important amongst visitors to Inverness, Loch Ness and Nairn (26%), Wester Ross (33%), and Sutherland (27%); more important amongst those on a longer stay in the HoST area (26% of those staying for 8 or more nights compared to 15% of those on a day trip); and more important amongst first time visitors (25%) than those on a repeat trip (22%).
- *Been before, know the area (18% overall)*: more important amongst those aged over 55 years (25%) than amongst visitors aged under 35 years (9%). More important for the following areas of the HoST area: Badenoch and Strathspey (25%), Wester Ross (24%), and Sutherland (22%). Also, more of an influence amongst those staying in the one location (22%), and amongst those who were on a return trip (28%);

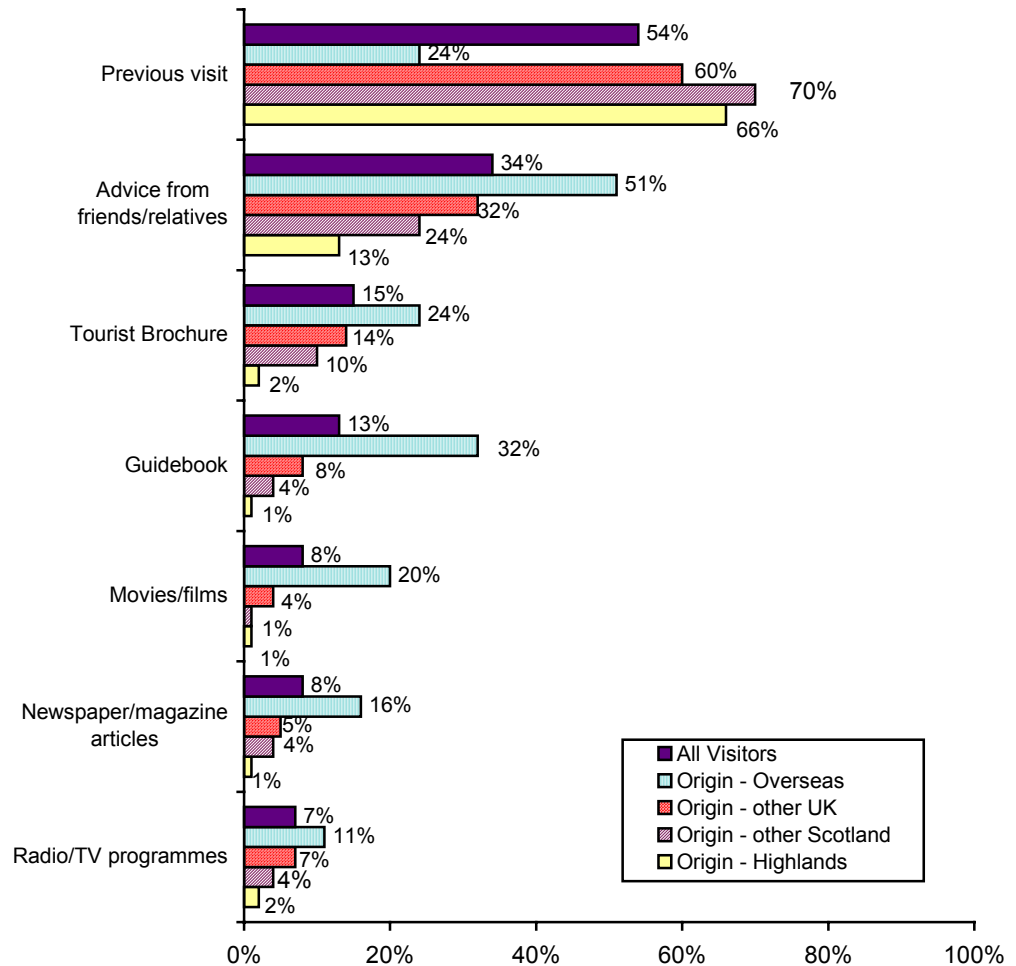
- *Never been before/always wanted to come (14% overall):* more important amongst those on their first ever trip to the Highlands (33%) and amongst visitors to Inverness, Loch Ness and Nairn (18%), Skye and Lochalsh (17%), Caithness (21%) and Sutherland (16%).

Marketing Influences

In an attempt to ascertain the relative influences of different marketing activities, respondents were provided with a list of items and asked if any of them had influenced their decision to visit the Highlands (see Figure B-4):

Figure B-4 - Influences on the decision to visit the Highlands (%)

Base: 2,998 visitors to the HoST area



In general, two key influences emerged amongst visitors to the HoST area: a previous visit(s) to the area (54%), and advice from friends or relatives (34%). Tourist brochures and guide books were also important however, each of which were described as having had some influence on 15% and 13% of trips to the HoST area respectively. All other influences were mentioned by fewer than 10% of respondents, and the dominance of previous visits and advice indicates the important role played by “informal” information sources in influencing visits.

There are some interesting variations in the influences on the trip amongst each of the main markets: Highland visitors, other Scots, other UK and overseas visitors. The top five influencing factors for each of these markets is indicated below:

Highland visitors:

Previous visit	- 66%
Advice - friends/relatives	- 13%
Visiting friends/relatives	- 3%
Work/business	- 3%
Radio/TV programme	- 2%

Other Scots visitors:

Previous visit	- 70%
Advice - friends/relatives	- 24%
Tourist Brochure(s)	- 10%
Guidebook	- 4%
Newspaper/magazine ads	- 4%

Other UK visitors:

Previous visit	- 60%
Advice - friends/relatives	- 32%
Tourist Brochure(s)	- 14%
Guide book	- 8%
Radio/TV programme	- 7%

Overseas visitors:

Advice - friends/relatives	- 51%
Guide book	- 32%
Tourist brochure	- 24%
Previous visit	- 24%
Movies/films	- 20%

Clearly, amongst Highland residents and other Scots visitors to the HoST area, previous visits to the Highlands were the major influence on their decision to visit this time. Advice from friends and relatives was also important however, mentioned by around one in four of Scots (24%) and 13% of Highland residents. Amongst visitors from other parts of the UK, previous visits were very important influences (61%), whilst advice from others was significantly more important than amongst Scots (32% and 24% respectively). For overseas visitors, advice from friends and relatives was the main influencing factor on

their decision to visit, although as many as a third decided to visit having read guidebooks (32%), indicating the important role played by this information source for overseas visitors.

Use of tourist brochures

In total 15% of those interviewed in the HoST area had been influenced to visit by tourist brochures. Tourist brochures were more influential in some markets than others: younger visitors were slightly more likely to have used them than older visitors (17% of those aged under 35 years as opposed to 11% of those aged 55+ years). Also, 25% of those on their first ever trip to the Highlands had been influenced by a tourist brochure as opposed to 11% of those who had been before. Also, use of brochures varied markedly by region of the HoST area visited. Visitors to the following areas were rather more likely to have been influenced by brochures:

- Skye and Lochalsh (23%); Caithness (28%) and Sutherland (24%).

Conversely, visitors to the following areas were less likely to have used brochures:

- Badenoch and Strathspey (7%) and Ross and Cromarty (12%).

Recognition of STB/ATB Brochures

These respondents who had been influenced by brochures were then shown the front covers of several tourist brochures produced by the Scottish Tourist Board and Highlands of Scotland Tourist Board, and asked whether any of them had influenced their visit (see Table B-5 below):

Table B-5 - Brochures which had influenced the visit (%)

Base: 455 respondents in the HoST area, influenced by brochure(s)

	Scots visitors to HoST area	Other UK visitors to HoST area	Overseas visitors to HoST area	All Visitors
Freedom of the Highlands (HOST)	46	38	23	33
Scotland - Main UK Guide (STB)	38	37	26	33
Scotland - Overseas Guide (STB)	24	20	44	31
6 Local Accommodation/ Visitor Guides (HOST)	18	18	11	15
None of these	41	36	41	39
Total:	100	100	100	100

Around six in ten respondents (61%) who had been influenced by a tourist brochure(s) in their decision to visit the Highlands recognised one or more of the brochures shown to them. The main Highland-wide guide produced by the Highlands of Scotland Tourist Board had highest levels of recognition (33%), along with STB's main UK guide (33%), closely followed by STB's overseas guide (31%). Recognition of any of the six A5-sized brochures produced by HOST was rather lower however (15%). Around four in ten of them had not used any of these brochures (39%) and were clearly talking about other, commercial brochures (e.g. coach tours, tour operators, or perhaps a brochure produced by other agencies such as the British Tourist Authority).

Recognition levels of the main Highland brochure were highest amongst Scots residents (46%) and lowest amongst visitors from overseas (23%). The main STB guide produced for the domestic markets had highest levels of recognition amongst visitors from Scotland and other parts of the UK (38% and 37% respectively). The STB's overseas brochure was recognised by as many as 44% of overseas visitors to the HoST area who had been influenced by brochures.

Length of Stay

Those respondents staying away from home were asked to indicate how many nights they would be away from home in Scotland, how many nights in the Highlands, and how many nights in the local area in which they were interviewed:

Table B-6 - Length of Stay (%)

Base: 2,824 respondents in the HoST area staying away from home

	Overnight visitors - length of stay.....		
	In Scotland	In the Highlands	In the area
None	-	4	20
One	2	4	14
Two	5	9	16
Three	7	10	11
Four	6	9	7
Five	6	8	5
Six	8	8	5
Seven	19	19	12
Eight - Thirteen	20	15	4
Fourteen	15	8	4
Fifteen or more	14	5	2
Total:	100	100	100
Average	10.0 nights	7.1 nights	4.0 nights

Typically, tourists in the HoST area were staying away from home in Scotland for 10.0 nights, in the Highlands for 7.1 nights, and in the local area for 4.0 nights. 96% of those who were away from home were staying overnight in the Highlands - only 4% were making day trips from other parts of Scotland. Also, four in every five of them (80%) were staying overnight in the local area in which they were interviewed.

As would be expected, there were some marked variations in the average length of stay recorded across the various regions of the HoST area:

No. of Nights



Visitors to Lochaber, Badenoch and Strathspey, Sutherland, Wester Ross and Caithness stayed in these areas longer than the average across the HoST area, whereas visitors to Inverness, Loch Ness and Nairn, and Skye and Lochalsh stayed for a smaller amount of time.

Locations such as Lochaber and Badenoch and Strathspey are characterised by larger numbers of “one-centred” holiday visitors, and this helps to explain the longer stay durations in these areas. Destinations such as Sutherland, Caithness and Wester Ross are rather more remote than other parts of the HoST area and the longer average stays in these areas may be a reflection of this. Meanwhile, the Inverness, Loch Ness and Nairn area together with Skye and Lochalsh are popular destinations within a wider tour of the Highlands, thus the shorter trip lengths taken to these areas is not surprising.

Length of stay in the Highlands generally varied amongst several of the market segments (average = 7.1 nights):

- C2DEs stayed slightly longer (7.2 nights) than ABC1s (7.0 nights);
- Visitors to the HoST area during the peak summer season from May to September stayed longer than those visiting in the shoulder months of March, April, October and November (7.3 nights and 5.6 nights respectively);
- Those respondents touring around and staying in more than three locations stayed for around 9.9 nights in the Highlands, whereas those staying in the one location only stayed for 6.8 nights;

- Visitors who were self-catering and who were camping and caravanning stayed longer (9.5 nights and 9.3 nights respectively) than those staying in hotels and guesthouses or bed and breakfast establishments (5.4 and 6.4 nights respectively);
- Length of stay in the HoST area increased significantly by distance travelled from home: overseas visitors were staying longest, typically spending 7.8 nights in the Highlands, compared with 7.2 nights for visitors from other parts of the UK, 6.2 nights amongst Scots, and 5.5 nights amongst Highland residents staying away from home in the area;
- First time visitors to the Highlands tended to stay for a slightly shorter period in the Highlands than those who had been before (6.8 and 7.3 nights respectively).

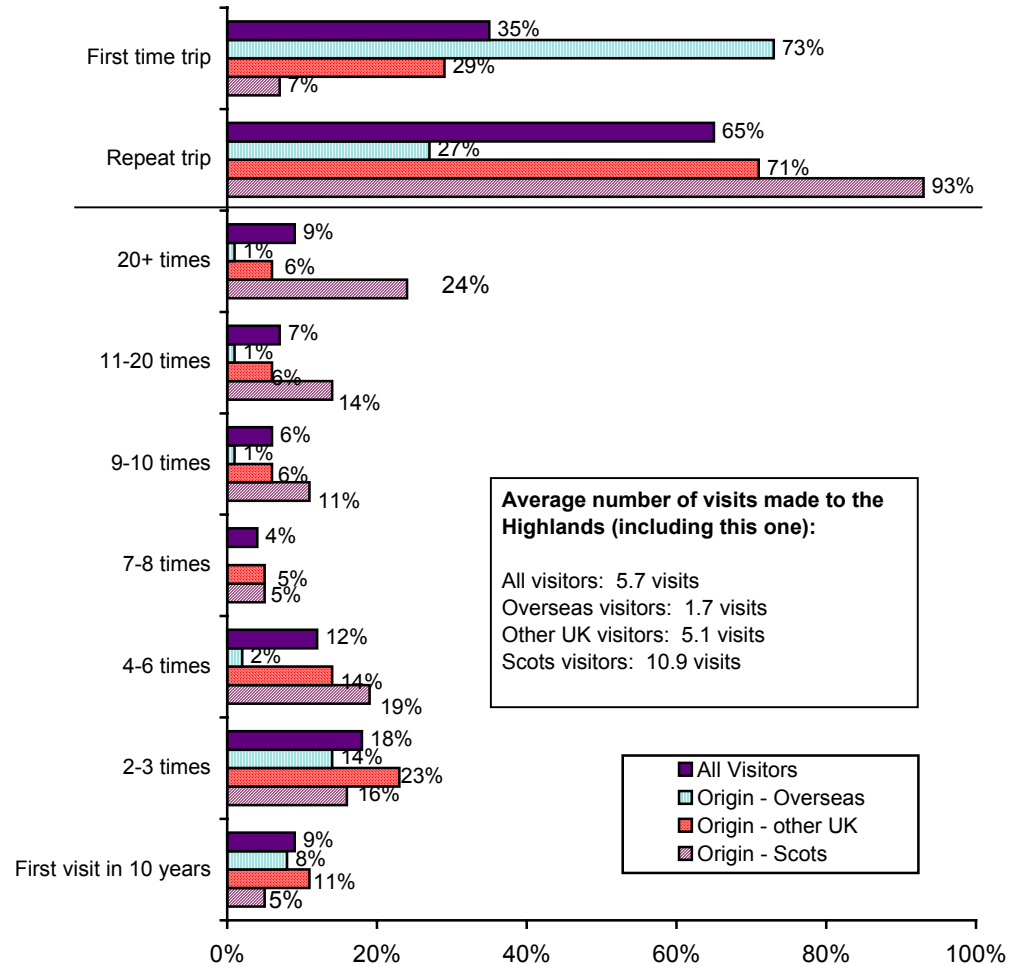
Previous Visits

Previous visits to the Highlands

Respondents' previous experience of the Scottish Highlands is indicated below:

Figure B-5 - Number of visits to the Highlands in the last 10 years (including this one)

Base: 2,839 non-Highland residents in the HoST area



Just over one third of the visitors to the HoST area were on their first ever visit (35%), indicating a healthy mix of “new” visitors and loyal, repeat visitors. Indeed, over a quarter of those interviewed had made more than seven or eight trips to the Highlands in the previous ten years (26%). As would be expected, Scots visitors were significantly more likely to be on a return trip (93%) than visitors from elsewhere in the UK (71%), whilst only around a quarter of overseas visitors were on a return trip (27%).

As would be expected, those aged 55+ years were more likely to have been to the Highlands before than those aged under 35 years (77% and 48% respectively were on repeat trips). C2DEs (71%) were also rather more likely to have been before than ABC1s (63%), whilst those on a centred break were significantly more likely to have been before (76%) than those on a touring holiday (48%).

Visitors to the following areas of the HoST area were also rather more likely to be on a return trip to the Highlands: Badenoch and Strathspey (72%) and Easter Ross (66%). On the other hand, visitors to Inverness, Loch Ness and Nairn and Skye and Lochalsh were more likely to be on their first ever visit (53% and 50% of visitors to these areas).

Visits to different areas of the HoST area

Visitors were asked to indicate which parts of the HoST area they would be visiting on their trip, and in which areas they would be staying overnight (see below):

Table B-7 - Areas Visited/Stayed in by visitors to the HoST area (%)

Base: 2,998 visitors to the HoST area

	Areas Visited	Areas Stayed in
Inverness, Loch Ness and Nairn	61	36
Lochaber	50	34
Isle of Skye and Lochalsh	39	28
Badenoch and Strathspey	33	19
Wester Ross	29	18
Easter Ross	25	10
Sutherland	24	16
Caithness	18	10
Total:	100	100

It must be borne in mind that this geographical distribution is partly a reflection of the distribution of interview locations throughout the HoST area. However, the numbers of interviews conducted in each area and the locations used were carefully chosen and agreed between System Three, HIE, HOST and HC based on previous knowledge of the tourist flows and volumes recorded throughout the region. Consequently, we believe that the distribution of visitors indicated represents a close representation of the actual distribution of tourists throughout the Highland area.

Over three in every five visitors to the HoST area were visiting the Inverness, Loch Ness and Nairn area on their trip (61%), making this the most popular region of the HoST area visited. Around half of the visitors went to Lochaber (50%), making this the second most popular area, followed by Skye and Lochalsh (39%) and Badenoch and Strathspey (33%).

Not surprisingly, those areas furthest from the population centres of the central belt and the south were the least likely mainland parts of the Highlands to be visited on this trip by those in the area: 24% of visitors went to Sutherland and 18% visited Caithness.

Amongst those who were staying at least one night in the Highlands, three areas were particularly popular, each stayed in by more than a quarter of visitors: Inverness Loch Ness and Nairn (36%), Lochaber (34%) and the Isle

of Skye and Lochalsh (28%). Each of the other areas was stayed in by less than one visitor in every five to the HoST area.

As would be expected, those visitors on a touring holiday were considerably more likely to be both visiting and staying in a wider range of areas of the HoST area than those on a centred holiday.

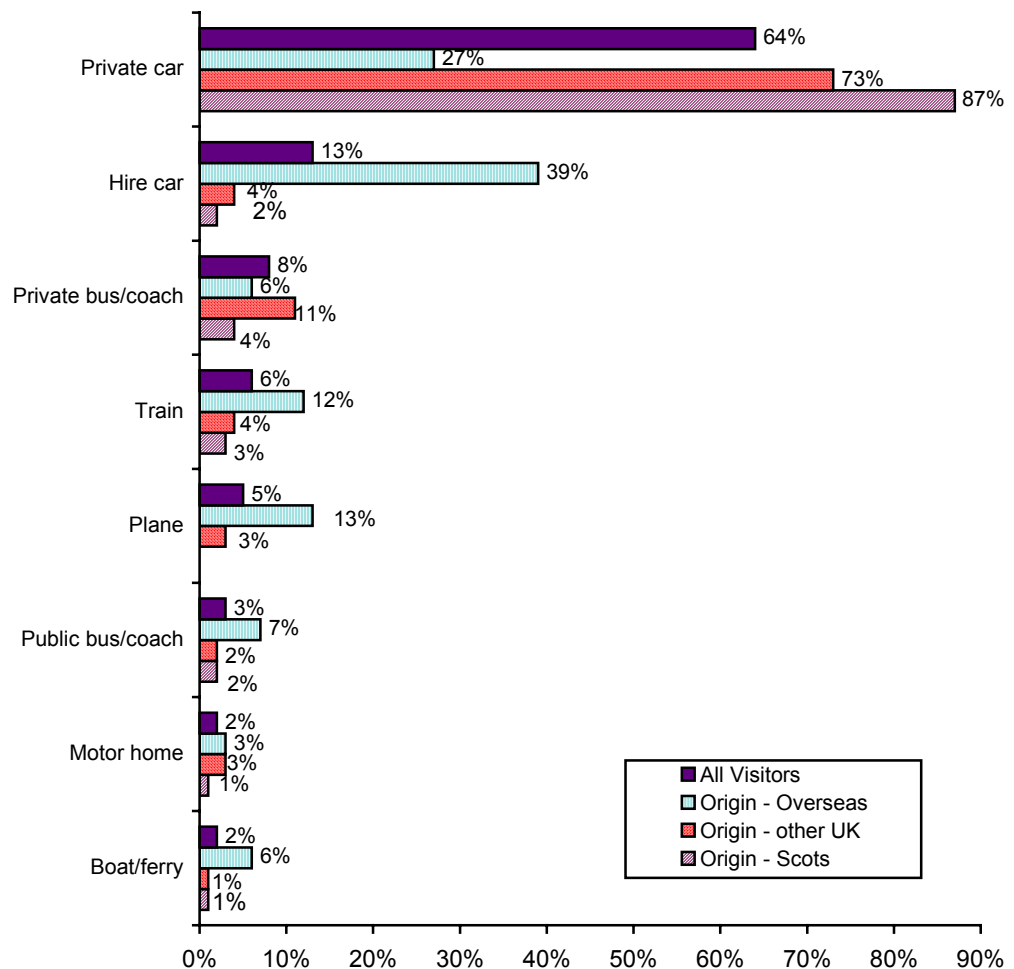
For a more detailed analysis of the characteristics of visitors to each of the regions of the HoST area, reference should be made to the relevant report produced for that area.

Transport Used

Respondents were asked what forms of transport they had used on their journey to the Highlands:

Figure B-6 - Forms of Transport used to get to the Highlands

Base: 2,839 visitors to the HoST area (excludes Highland residents)



Around two thirds of visitors used their own car on their journey to the Highlands (64%), whilst a further 13% used a rental car. Coaches (8%), trains (6%) and planes (5%) were the only other forms of transport used by 5% or more of visitors to the area.

As might be expected, there were some significant variations in the forms of transport used to get to the Highlands amongst visitors from different regions of origin:

- *Overseas visitors* were much more likely to use a hire car (39%), and although 29% used their own car, planes and trains were more important means of arrival for these markets (13% and 12% respectively);
- Almost three quarters of visitors from *England, Wales and Northern Ireland* used their own car on the journey to the Highlands (73%), however a larger proportion than average came on a coach tour (11%);
- The vast majority of *Scots visitors* used their own car on the trip to the Highlands (87%). All other forms of transport were used on fewer than 5% of trips.

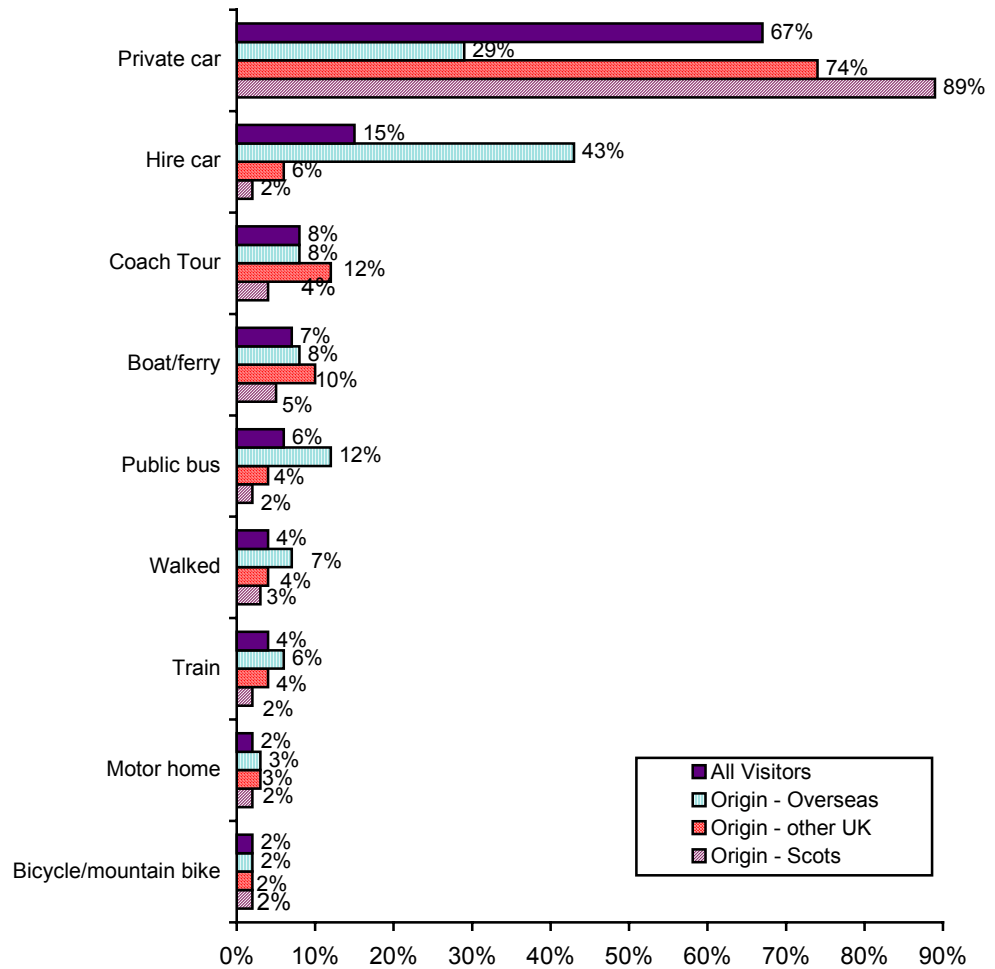
There were some other variations in the forms of transport used amongst some of the key market segments:

- Under 35s: more likely to use rental cars (18%), trains (10%) and public buses (8%);
- Over 55s: more likely to be on a private coach tour (18%);
- ABC1s: more likely to arrive by hire car (15%);
- C2DEs: more likely to be on a coach tour (12%);
- Touring holidays: more likely to arrive by rental car (21%), by plane (8%) or in motor homes (8%);
- Those based in one location: more likely to use their own car to get there (73%);
- First time visitors: more likely to use rental cars (25%);
- Repeat visitors: more likely to arrive in their own car (75%).

The types of transport used by visitors **whilst in the Highlands** is indicated below:

Figure B-7 - Forms of Transport used whilst in the Highlands

Base: 2,998 visitors to the HoST area



Just over two thirds of the visitors to the HoST area used their own car to travel around (67%), making this the main form of transport used during their visit. Some 15% hired a car, whilst all other forms of transport were used by less than 10% of visitors to the HoST area.

Accommodation

Accommodation used in the HoST area

Those respondents who were staying overnight in the HoST area were asked what types of accommodation they were using during their visit:

Table B-8 - Accommodation used in the HoST area (%)

Base: 2,712 visitors to the HoST area staying overnight

	Overnight Scots visitors to HoST area	Overnight other UK visitors to HoST area	Overnight overseas visitors to HoST area	All overnight Visitors
Bed and Breakfast	16	22	50	28
Hotel/motel	25	27	21	24
Rented house/flat/cottage	14	23	5	15
Tent	10	9	16	11
Staying with friends and relatives	12	8	4	8
Youth Hostel	3	3	15	6
Touring caravan	9	5	1	5
Guest house	4	5	5	5
Static caravan - rented	7	4	1	4
Motor caravan/camper van	1	3	3	2
Timeshare	3	2	1	2
Total:	100	100	100	100

Bed and breakfast establishments were the most popular forms of accommodation used by visitors to the HoST area (28%). Hotels and motels were next most popular, stayed in by around a quarter of overnight visitors (24%), followed by self-catering in flats, houses and cottages (15%) and tents (11%). All other forms of accommodation were used by less than one visitor in ten.

There were variations in the types of accommodation used by visitors from different regions of origin:

- *Scots visitors*: More likely to be staying with friends and relatives (12%) or in touring or static caravans (9% and 7% respectively). Scots were rather less likely than average to stay in bed and breakfast establishments (16%) or in youth hostels (3%);

- *Other UK visitors:* This group was rather more likely to stay in self-catering accommodation in the HoST area than the average for all visitors (23%). Conversely, these visitors were rather less likely to stay in B&Bs (22%), tents (9%) or youth hostels (3%);
- *Overseas visitors:* Half of them stayed in bed and breakfast establishments (50%) making this far and away the main form of accommodation used. In addition, youth hostels were rather more popular amongst this market than average (15%).

Amongst some of the other market segments, there were some other notable differences in the types of accommodation used in the HoST area:

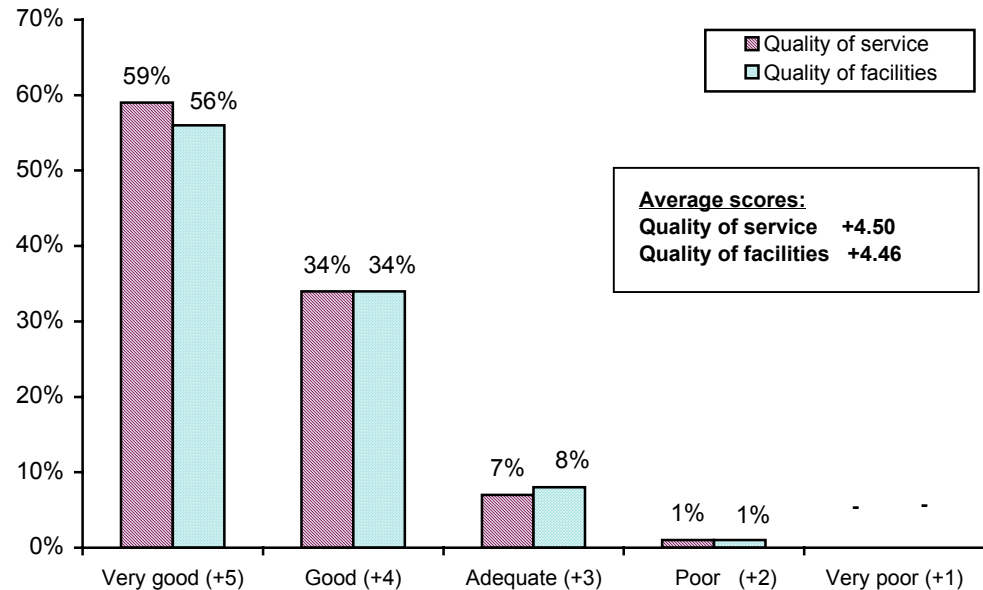
- *Visitors aged under 35 years:* more likely to stay in bed and breakfast establishments (35%), tents (22%) or youth hostels (15%), and less likely to stay in hotels/motels (15%) or in self-catering accommodation (11%);
- *Visitors aged 55+ years:* more likely to stay in hotels (39%), but less likely to stay in tents (2%) or in youth hostels (1%);
- *Type of trip:* those on a touring trip were more likely to be staying in bed and breakfast establishments (49%), tents (26%), motor caravans (7%) or in youth hostels (16%) than those staying in the one location (13%, 5%, less than 1% and 2% respectively). Conversely, tourers were less likely to stay in self-catering accommodation (1%) or with friends and relatives (3%) than those staying in the one location (24%, and 12% respectively);
- *Length of Stay:* bed and breakfast establishments (35%) and hotels/motels (34%) were rather more popular forms of accommodation on 1-3 night breaks in the HoST area than on breaks of 8 or more nights (26% and 13% respectively).

Levels of satisfaction with accommodation

Those people interviewed in the HoST area who had stayed overnight in commercial accommodation during their trip, were asked to rate the quality of service and the quality of facilities experienced:

Figure B-8 - Rating of accommodation used by visitors to the Highlands (%)

Base: 2,087 visitors to the HoST area staying in commercial accommodation



Note: (-) - nil respondents

Satisfaction levels with their accommodation were generally fairly high amongst those visitors who had stayed in commercial accommodation during their trip to the Highlands. Three in every five (59%) described the quality of service as “very good”, whilst a further one third (34%) described it as “good”. And 7% felt the service had been adequate. Encouragingly, less than 1% of respondents (n=16) described the quality of service as “poor” and only 3 respondents described the quality of service as “very poor”. Satisfaction levels with the facilities experienced in accommodation were very slightly less positive than satisfaction with the service, although the differences were barely significant.

By applying “scores” from +5 (Very good) to +1 (Very poor), it is possible to obtain an index of satisfaction for the service and facilities experienced in Highland accommodation. Overall, the quality of service and quality of facilities in accommodation achieved scores of +4.50 and +4.46 respectively.

In both cases, satisfaction levels were generally higher amongst those aged 55+ years, and amongst those staying in the one location. Slightly lower levels of satisfaction were apparent amongst overseas visitors, a feature which has been evident in other visitor surveys within Scotland, and indeed, elsewhere in the UK.

There were also some regional variations in satisfaction with accommodation. The following areas achieved slightly above average levels of satisfaction with the quality of service received in their accommodation (average = 4.50):

- Badenoch and Strathspey (+4.56); Easter Ross (+4.56) and Sutherland (+4.56);

Conversely, the following areas achieved lower than average scores:

- Caithness (+4.44); Lochaber (+4.42) and Skye and Lochalsh (+4.41).

Activities Undertaken

Visitors were provided with a list of activities and asked to indicate which of them, if any, they had undertaken during their trip, and which they would describe as their main activity. Those activities undertaken whilst visiting the HoST area by more than 5% of respondents are summarised below:

Table B-9a - Activities undertaken whilst visiting the HoST area (%)

Base: 2,998 visitors to the HoST area

	Highland visitors to HoST area	Scots visitors to HoST area	Other UK visitors to HoST area	Overseas visitors to HoST area	All Visitors
Any Sporting activities	30	58	64	65	61
Low level walking of 2-8 miles	21	42	50	54	48
Hill walking/low level walks >8mi	4	10	12	14	12
Cycling/mountain biking	3	10	8	10	9
Golf	3	9	6	3	6
Game Fishing	2	6	6	3	5
Mountaineering/rock climbing	2	4	5	6	5
No sporting activities	70	42	36	35	39
Any non-sporting activities	93	96	98	99	98
General sightseeing/touring	63	88	93	97	91
Shopping	51	60	58	57	58
Museum/art gallery/heritage cen.	21	35	40	53	41
Wildlife attraction	10	26	28	22	25
Archaeological site	4	10	16	28	17
Leisure centre/swimming pool	11	21	15	7	14
Concert/ceilidh/theatre/cinema	4	10	11	14	11
Other local event	6	7	5	8	6
Other cultural event	1	2	5	9	5
No non-sporting activities	7	4	2	1	2
Total:	100	100	100	100	100

Whilst three visitors in every five indicated that they had taken part in some sporting/outdoor activities during their trip to the HoST area (61%), almost all of them had taken part in some non-sporting activities (98%).

The most common sporting activity was *low level walking* of between two and eight miles distance: almost half of the visitors to the HoST area had participated in this activity during their trip (48%) making this far and away the most popular sporting/outdoor activity. Hill walking and longer distance low level walking were the next most popular activities, undertaken by 12% of visitors. Cycling/mountain biking, golf, game fishing and mountaineering/rock climbing were the only other sporting activities undertaken by 5% or more visitors to the area.

As might be expected, *general sightseeing and touring* was the most commonly cited non-sporting activity undertaken by visitors to the HoST area, carried out by around nine visitors in every ten (91%). Almost three in five (58%) went shopping during their visit to the Highlands, whilst visits to museums, galleries and heritage centres were made by more than four in ten visitors (41%). Four other non-sporting activities were undertaken by more than 10% of visitors: visits to wildlife attractions (25%), archaeological sites (17%), leisure centres and swimming pools (14%), and concerts/ceilidhs/theatre /cinema (11%).

As might be expected, there were some variations amongst visitors from different regions of origin, with participation rates generally increasing with distance travelled:

- *Highland residents*: Less likely to take part in any activities during their visit/day out in the HoST area. Although over one in five (21%) went low level walking, no other sporting activities were participated in by more than 5% of residents. Just under two thirds were general sightseeing or touring (63%), whilst just over half went shopping (51%);
- *Scots visitors*: rather more likely to be shopping in the Highlands (60%), or visiting leisure centres/swimming pools (21%). Less likely than the average to be visiting museums (35%) or archaeological sites (10%);
- *Other UK visitors*: Rather more likely than average to be general sightseeing (93%), visiting wildlife attractions (28%) or low level walking (50%);
- *Overseas visitors*: Highest rates of participation amongst all regions of origin. Over half went low level walking (54%), 97% were sightseeing, 53% visited museums and galleries and 28% visited archaeological sites. Less likely to be golfing (4%), game fishing (3%) or to visit leisure centres or swimming pools (7%).

The table below provides information on those activities undertaken as the main reason for the trip amongst visitors to the HoST area. Those mentioned by 1% or more respondents are listed:

Table B-9b - Activities undertaken as MAIN ACTIVITY in the HoST area (%)

Base: 2,998 visitors to the HoST area

	Highland visitors to HoST area	Scots visitors to HoST area	Other UK visitors to HoST area	Overseas visitors to HoST area	All Visitors
Any Sporting activities	15	21	19	11	17
Low level walking of 2-8 miles	7	9	9	6	8
Hill walking/low level walks >8mi	2	4	4	3	4
Mountaineering/rock climbing	1	2	2	1	1
Cycling/mountain biking	2	1	1	1	1
Golf	1	2	1	*	1
Game Fishing	-	1	1	*	1
No sporting activities	85	79	81	89	83
Any non-sporting activities	83	77	79	88	81
General sightseeing/touring	46	67	75	85	74
Shopping	13	2	*	*	2
Museum/art gallery/heritage cen.	6	1	*	1	1
Visiting friends/relatives	2	2	1	*	1
Go to a wildlife attraction	2	1	1	*	1
No non-sporting activities	17	23	21	12	19
Total:	100	100	100	100	100

* less than 0.5%

When asked to indicate which one activity, if any, could be described as their main activity during their trip, only 17% of visitors mentioned a sporting activity, with low level walking (8%) described most frequently, followed by hillwalking (4%). As many as 81% described a non-sporting activity however, with general sightseeing/touring far and away the main activity undertaken (74% of visitors). Scots and other UK visitors were rather more likely to be on a sporting holiday (21% and 19% respectively) than overseas visitors (11%). Conversely, sightseeing and touring was the main purpose of over four overseas trips in every five to the HoST area (85%), significantly more than the 67% of Scots and 46% of Highland residents who described it as such.

Levels of satisfaction

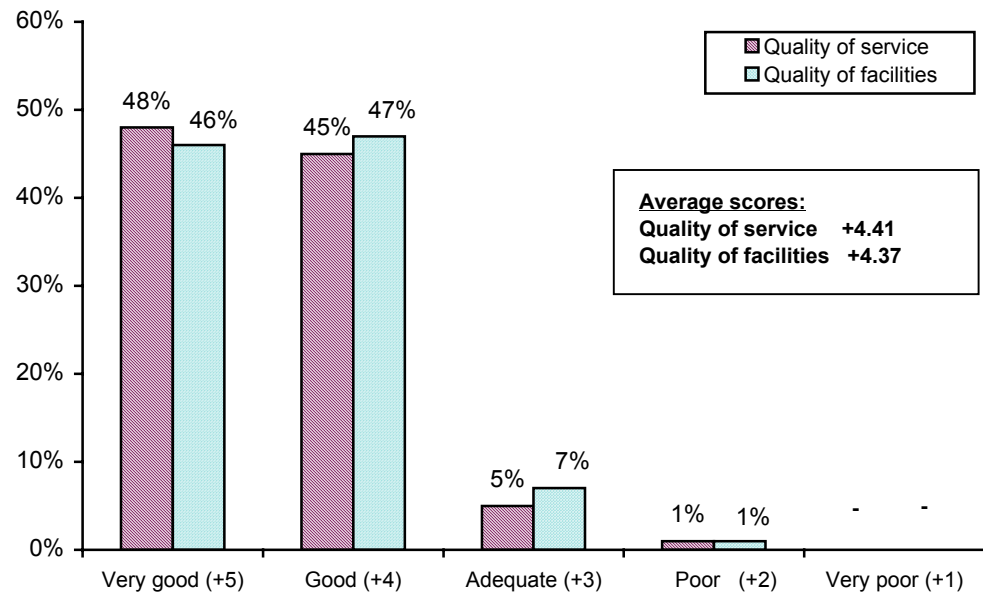
Visitors were asked a series of questions regarding various aspects of their levels of satisfaction with their trip.

Levels of satisfaction with attractions

Firstly, visitors were asked to rate the quality of service and the quality of facilities experienced in visitor attractions:

Figure B-9 - Rating of attractions (%)

Base: 2,172 respondents who had visited attractions in the Highlands



Satisfaction levels with attractions visited in the Highlands were generally quite high. Just under half (48%) described the quality of service as “very good”, whilst over four in ten (45%) described it as “good”. Only 5% described it as merely adequate, whilst 1% felt service had been “poor” in Highland attractions.

Satisfaction levels were very similar regarding the quality of facilities experienced in attractions, albeit that there was more of a swing to “good” rather than “very good”.

As with accommodation, by applying “scores” from +5 (Very good) to +1 (Very poor), it is possible to obtain an index of satisfaction for the service and facilities experienced in Highland visitor attractions. Overall, both the quality of service and the quality of facilities achieved similar scores (+4.41 and 4.37 respectively). In terms of both the quality of service and the facilities, satisfaction levels were fairly similar across all of the main market segments, although there were some variations across the different regions of the HoST

area. Respondents interviewed in the following areas provided slightly higher than average scores for the quality of service received in attractions:

- Sutherland (+4.53) and Caithness (+4.52);

Conversely, those interviewed in the following areas were slightly less positive about the quality of service received:

- Lochaber (+4.25); Skye and Lochalsh (+4.28) and Easter Ross (+4.31).

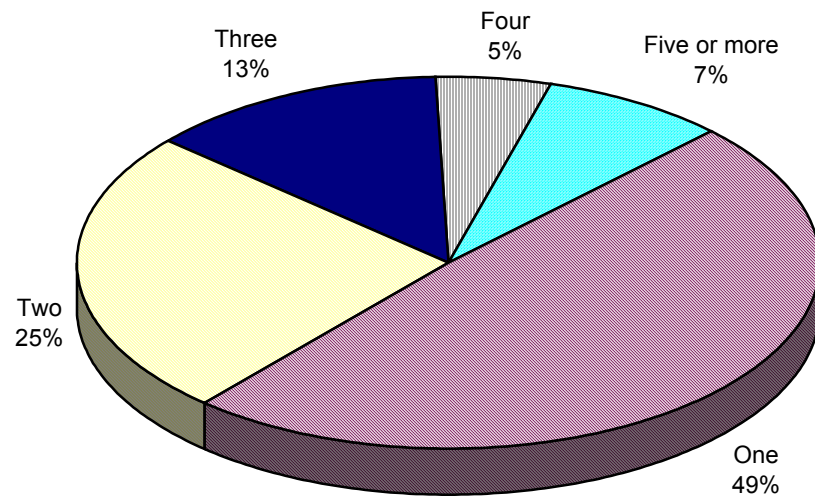
Visits to Tourist Information Centres in the HoST area

Over half of the respondents had already visited a Tourist Information Centre (TIC) during their visit to the HoST area (57%). Certain markets were rather more likely to visit TICs than others: 65% of the under 35s had visited compared with 50% of those aged 55+. There were also some clear variations by origin of visitors: 77% of overseas visitors had visited TICs, a significantly higher proportion than those who had visited from other parts of the UK (59%), from Scotland (43%) or from the Highlands itself (18%). Visits to TICs were also more frequent amongst ABC1s (61%), and those on touring holidays (82%), as well as those who were staying in the HoST area for over a week (75%) and those on their first ever visit (71%).

Amongst the 44% of visitors who had not visited a TIC on their trip, around a fifth of them (21%) intended to visit one at some stage, whereas almost three quarters (72%) had no intention of visiting a TIC. In total therefore, two thirds of visitors had either already visited or intended to visit a TIC on their trip (66%).

Those who had visited TICs on their trip were asked to indicate how many they had visited:

Figure B-10 - Number of visits to Highland TICs
Base: 1,721 Highland respondents who had visited a TIC



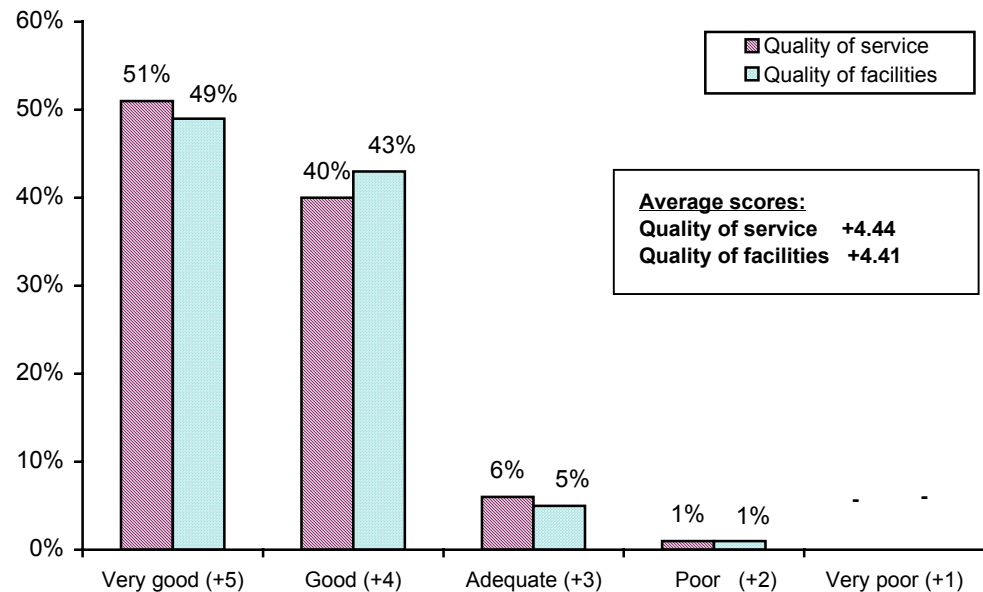
Around half of the visitors had visited one Tourist Information Centre on their visit to the HoST area (49%), whilst a further 38% had visited two or three during their visit. Small minorities were clearly practised TIC users: 7% had visited five or more on their trip to the HoST area. On average, respondents had visited 2.0 TICs on their trip to the Highlands. Those on a touring trip (2.7 visits), from overseas countries of origin (2.5 visits), visiting the Highlands for eight nights or more (2.5 visits) and on their first ever visit (2.3 visits) were most likely to use TICs. TIC visits were also rather more common amongst visitors to Inverness, Loch Ness and Nairn (2.4 visits) and Caithness (2.4 visits)

Levels of satisfaction with Tourist Information Centres

Those people interviewed who had already visited a Tourist Information Centre on their trip were asked to rate the quality of service and the quality of facilities experienced in Highland TICs:

Figure B-11 - Rating of TICs (%)

Base: 1,721 visitors to the HoST area who had used TICs



Note: (-) - nil respondents

Amongst those respondents who had used TICs in the HoST area, levels of satisfaction with both the quality of service and the quality of facilities provided were high. In each case, around half described them as “very good” (51% and 49% respectively), whilst around four in ten described them as good (40% and 43%). Only 1% of TIC visitors described the service received and the facilities on offer as “poor” (19 respondents in each case).

As with accommodation and visitor attractions, by applying “scores” from +5 (Very good) to +1 (Very poor), it is possible to obtain an index of satisfaction for the service and facilities experienced in Highland TICs. Overall, the quality of service and the quality of facilities obtained almost identical satisfaction scores of +4.44 and +4.41 respectively. There were no statistically significant variations in these scores amongst any of the key market segments.

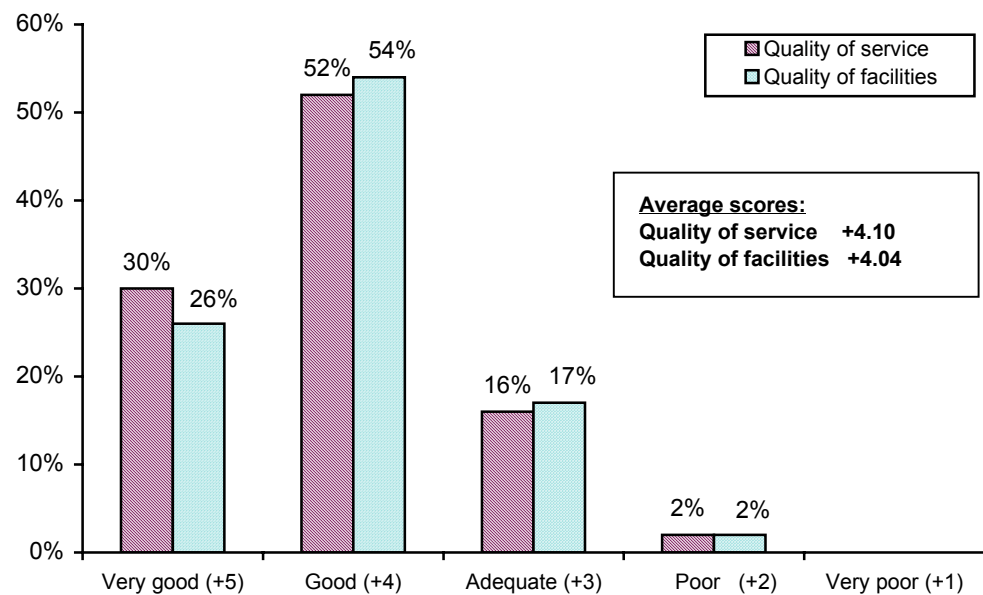
Levels of satisfaction with shops

In addition to levels of satisfaction with the quality of service obtained in their accommodation, attractions visited, and TICs as described in previous sections, respondents were also asked to rate the service and facilities in pubs and restaurants and in shops in the HoST area:

Ratings of Shops

Figure B-12 - Rating of shops (%)

Base: 2,475 visitors to the HoST area



Note: (-) - nil respondents

Levels of satisfaction with shops in the HoST area are noticeably lower than for many of the other types of establishments measured. Although only 2% described both the quality of service obtained and the quality of facilities received as “poor” and less than 1% described them as “very poor”, generally their satisfaction levels were very slightly lower than for accommodation, visitor attractions and TICs in the HoST area. Less than one third described either aspect of Highland shops as being “very good”, although the majority of respondents did describe both the quality of service (52%) and the quality of facilities (54%) as “good”.

Scores of +4.10 (service) and +4.04 (facilities) were obtained on average amongst the 2,998 respondents interviewed. There were no significant

variations across the market segments analysed, although there were a number of variations across the different regions of the HoST area. For example, respondents interviewed in the following areas provided slightly higher than average scores for the quality of service received in shops (average = +4.13):

- Inverness, Loch Ness and Nairn (+4.28); and Badenoch and Strathspey (+4.27);

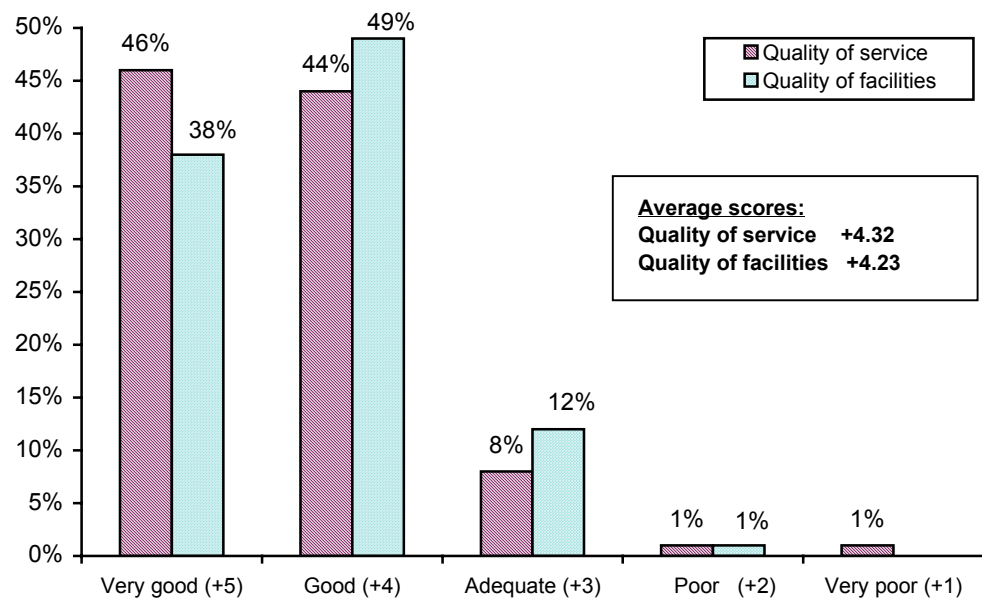
Conversely, those interviewed in the following areas were slightly less positive about the quality of service received:

- Lochaber (+3.92); and Skye and Lochalsh (+3.82).

Levels of satisfaction with pubs and restaurants

Figure B-13 - Rating of pubs/restaurants (%)

Base: 2,998 visitors to the HoST area



Note: (-) - nil respondents

As with most other aspects of the Highland tourism product, visitors to the Skye and Lochalsh area were fairly satisfied with both the quality of service and facilities on offer in Highland pubs and restaurants. Just under half (46%) described the quality of service as “very good”, whilst a further 44% described it as “good”. The facilities on offer received similar ratings.

On average, the quality of service achieved an average score of +4.32 and the facilities achieved a score of +4.23. Satisfaction levels were marginally higher amongst older visitors and amongst Scots visitors, however the differences are not statistically significant.

Improvements which would have made the visit more enjoyable

Finally, in terms of their satisfaction, visitors were asked what improvements could have been made by the local bodies responsible for tourism to improve their trip to the Highlands. Those mentioned by 2% or more respondents are indicated below:

Table B-10 - Improvements which would make trip to Highlands more enjoyable (%)

Base: 2,998 visitors to the HoST area

	Highland visitors to HoST area	Scots visitors to HoST area	Other UK visitors to HoST area	Overseas visitors to HoST area	All Visitors
More/better signposting	3	5	6	7	6
Not enough tourist information	4	5	7	6	6
Too expensive	3	5	4	6	5
Roads: any mention of improvements	4	5	5	4	5
Attractions: any mention of improvements	5	6	2	3	4
Lack of public toilet facilities	6	5	4	2	4
Food/eating out - poor quality/value	2	4	3	4	3
Opening hours: Sunday/toilets/ shops	5	4	3	3	3
Accommodation improvements	2	3	3	4	3
Buses to more locations/greater frequency	4	1	2	4	3
Parking – not enough/too dear	5	2	1	2	2
TICs: any mention of improvements	1	2	2	2	2
Petrol/fuel – any mention	2	2	2	1	2
Nothing at all/very little	55	51	54	51	52
Total:	100	100	100	100	100

Over half of those interviewed in the HoST area did not believe the local bodies responsible for tourism could have done anything to improve their trip (52%). Amongst those who did think improvements could have been made, the range and variety of suggestions were very large: no single improvement was mentioned by more than 6% of visitors. Improvements to the signposting and the lack of tourist information were mentioned by 6% of visitors, whilst the costs and expense associated with a holiday in the area were mentioned by 5% as were improvements to the roads infrastructure. The following segments more frequently cited these three main suggestions:

- *More/better signposting (6% overall)*: mentioned by 11% of visitors to Caithness and 7% of overseas visitors;
- *Insufficient tourist information (6% overall)*: mentioned by 8% of those staying in excess of one week and by 8% of those who were staying in bed and breakfast establishments
- *Too expensive (5% overall)*: mentioned by 11% of visitors to Caithness and 8% of visitors to Sutherland.

Expenditure

Visitors were asked to indicate how much they had spent on their trip to the HoST area. The analysis of expenditure provided below refers to the 2,824 respondents who stayed overnight (tourists).

Respondents were first of all asked how much they had spent on various elements of their trip over the previous 24 hours on themselves and any other members of their party. They were then asked how many people this expenditure had covered. Table B-11 provides the average daily expenditure by respondents (including that spent on others) and daily expenditure per person, per day:

Table B-11 - Amount spent per day

Base: 2,824 visitors to the HoST area staying overnight

	Spend per night (including on others) in the HoST area	Spend per night per person in the HoST area
Accommodation	£38	£18
Food and drink (outside accommodation)	£23	£11
Entertainment	£6	£2
Shopping	£14	£6
Transport	£12	£6
Total:	£93	£43

Typically, respondents in the HoST area spent £93 per day during their trip to the Highlands on themselves and others in their party. This averaged out at a mean spend of £43 per person per day. Accommodation spend accounted for the largest proportion of this expenditure (42%) followed by food and drink (23%).

The following market segments spent *more* on average per person per day:

- those staying in hotels and guesthouses (£60) and in bed and breakfast establishments (£53), and overseas visitors (£52).

The following markets spent *less* on average per person, per day:

- those aged under 35 years (£40), C2DEs (£38), those who were on a caravanning or camping trip (£31), and Scots visitors (£37).

By applying the average length of stay figures to the daily expenditure estimates indicated in Table B-12, it is possible to obtain estimates of spending on a “per

trip” basis. The table below provides an indication of the average spending on the trip in the Highlands:

Table B-12 - Amount spent per trip

Base: 2,824 visitors to the HoST area staying overnight

	Spend per trip (including on others) in the HoST area	Spend per trip per person in the HoST area
	<i>7.1 nights</i>	<i>7.1 nights</i>
Accommodation	£270	£128
Food and drink (outside accommodation)	£163	£78
Entertainment	£43	£14
Shopping	£99	£43
Transport	£85	£43
Total:	£660	£305

Typically, respondents spent around £660 during their trip to the HoST area on themselves and others in their party. This averaged out at a mean spend of just over £300 per person on their trip to the area.

- Reflecting the variations in length of stay, those segments spending more (and less) per trip in the HoST area were not necessarily the same as those spending more or less on a daily basis. The following market segments spent *more* on average per person per trip: those on a touring holiday (£455), those who were in self-catering accommodation (£390), and visitors from overseas (£406).

The following markets on the other hand spent *less* on average per person, per trip:

- C2DEs (£274), those staying in the one location (£272), those staying in caravans (£288), and Scots visitors (£229).

By multiplying the trip spending figures by the average party sizes, it is also possible to obtain estimates of the average party spend in the HoST area amongst the different market segments. This is summarised below:

Table B-13 - Spending per party

Base: 2,824 visitors to the HoST area staying overnight

	Spend per person per day	Spend in the HoST area			Spend per party per trip
		Average length of stay in the HoST area	Spend per person per trip	Average party size	
<i>Age</i>					
15-34	£40	7.1 nights	£284	2.68	£761
35-54	£44	7.1 nights	£312	2.96	£924
55+	£45	7.1 nights	£320	2.46	£787
<i>Social Class</i>					
ABC1	£45	7.0 nights	£315	2.70	£850
C2DE	£38	7.2 nights	£274	2.82	£773
<i>Type of Holiday</i>					
Centred	£40	6.8 nights	£272	3.00	£816
Staying in 2 or 3 locations	£49	6.9 nights	£338	2.49	£842
Touring	£46	9.9 nights	£455	2.25	£1,024
<i>Accommodation Used</i>					
Hotels/Guesthouses	£60	5.4 nights	£324	2.39	£774
Bed and Breakfasts	£53	6.4 nights	£339	2.38	£807
Self-catering	£41	9.5 nights	£390	3.65	£1,424
Caravan/Camping	£31	9.3 nights	£288	2.72	£783
<i>Origin</i>					
Scotland	£37	6.2 nights	£229	2.93	£671
Other UK	£42	7.2 nights	£302	2.70	£815
Overseas	£52	7.8 nights	£406	2.55	£1,035
<i>Area Stayed in</i>					
Inverness, L Ness & Nairn	£48	6.5 nights	£312	2.64	£824
Lochaber	£46	6.9 nights	£317	2.56	£812
Skye & Lochalsh	£47	6.3 nights	£296	2.43	£719
Badenoch & Strathspey	£42	6.6 nights	£277	3.05	£845
Easter Ross	£41	7.8 nights	£320	2.48	£794
Wester Ross	£44	8.1 nights	£356	2.43	£865
Caithness	£49	9.2 nights	£451	2.40	£1,082
Sutherland	£53	8.6 nights	£456	2.49	£1,135
Total:	£43	7.1 nights	£305	2.74	£836

In terms of total trip spending per party, the average spend was £836. The highest spenders by some margin were those staying in self-catering establishments (£1,424), followed by overseas visitors (£1,035) and those who

were on a touring holiday (£1,024). On the other hand, lowest spenders were Scots visitors (£671), C2DEs (£773), those aged under 35 years (£761) and those who were staying in hotels (£774) or who were camping/caravanning (£783).

Visitors who travelled as far as Caithness or Sutherland also tended to spend more on average (£1,082 and £1,135 on their whole trip respectively). Conversely, those who visited Skye and Lochalsh (£719) tended to spend least.

C. Appendix 1: Social Class

- A**
- UK: 3% of the population;
 - These are professional people, or are very senior in business or commerce, or are top civil servants
 - Retired people, previously grade A, and their widows
- B**
- UK: 18% of the population;
 - Middle management executives in large organisations, with appropriate qualifications
 - Principle officers in local government and civil service
 - Top management or owners of small business concerns, educational and service establishments
 - Retired people, previously grade B, and their widows
- C1**
- UK: 27% of the population;
 - Junior management; owners of small establishments; and all others in non-manual positions
 - Jobs in this group have very varied responsibilities and educational needs
 - Retired people, previously grade C1 and their widows
- C2**
- UK: 24% of the population;
 - All skilled manual workers, and those manual workers with responsibility for other people
 - Retired people previously grade C2, with a pension from their job
 - Widows, if receiving pensions from their late husband's job
- D**
- UK: 16% of the population;
 - All semi skilled and unskilled manual workers, and apprentices and trainees to skilled workers
 - Retired people, previously grade D, with a pension from their job
 - Widows, if receiving a pension from their late husband's job
- E**
- UK: 12% of the population;
 - All those entirely dependent on the state long term, through sickness, unemployment, old age or other reasons. Those unemployed for a period exceeding 6 months (otherwise classified on previous occupation)
 - Casual workers and those without a regular income
 - Only households without a chief wage earner are coded in this group

D. Appendix 2: Questionnaires

