

***HIGHLANDS VISITOR  
SURVEY, 1997  
INVERNESS, LOCH NESS &  
NAIRN AREA  
Final Report***

*Prepared for :*

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Highland Council  
Highlands of Scotland Tourist Board  
Inverness and Nairn Enterprise*

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## Executive summary

- 94% of visitors to the Inverness, Loch Ness and Nairn area were staying away from home, predominantly on holiday. Only 6% of visitors were on a day trip from home;
- The majority of trips taken were not touring in nature: over half of those visiting the Inverness, Loch Ness and Nairn area were staying in the one location and taking day trips from there;
- With 37% of visitors aged under 35 years, the age profile of visitors to the area was relatively young: 30% of visitors to the Highlands as a whole were under 35, and UKTS and IPS suggest that 30% of visitors to Scotland fall within this age bracket;
- Visitors to the area were very upmarket in profile: 67% were ABC1s, particularly visitors from overseas, those on touring holidays, and those staying in hotels;
- Average party size amongst visitors to the area was 2.92 people, a slightly larger party size than the average for the Highlands as a whole, and partly a reflection of the larger proportion of visitors who had children with them (24%);
- Around a quarter of visitors were from Scotland (26%), four in ten were from elsewhere in the UK (40%), and the remaining 34% were from overseas;
- The main reasons for the trip to the Highlands related to aspects of the Highland scenery (26%);
- Two key influences on the decision to visit the Highlands emerged: a previous visit to the area (48%), and advice from friends or relatives (39%), highlighting the importance of informal sources of information;
- 13% of visitors had been influenced by tourist brochures. Amongst these respondents, just over a third mentioned each of the HOST main guide, the STB main UK guide, and the STB overseas guide;

- Typically, tourists visiting Inverness, Loch Ness and Nairn were staying away from home for 9.3 nights, spending 6.5 nights in the Highlands, and 3.4 nights locally;
- Around half of the visitors to the Inverness, Loch Ness and Nairn area were on their first ever trip to the Highlands; 55% were on their first ever trip to the local area. There are a large proportion of frequent, loyal visitors however: a quarter had been to the Highlands four or more times previously;
- Almost half of those visiting the Inverness, Loch Ness and Nairn area were also visiting Lochaber (45%), whilst just under a third were visiting Skye (31%) and the Badenoch and Strathspey area (30%);
- Almost three in five visitors used their own car on their journey to the Highlands (57%), whilst 19% used a rental car. Similar proportions used these forms of transport whilst there;
- Bed and breakfast establishments were the most popular forms of accommodation (34%), followed by hotels (22%) and self-catering accommodation (12%). Visitors were generally satisfied with both the quality of service and facilities in their accommodation - 93% and 91% respectively;
- Over half of the visitors to the Inverness, Loch Ness and Nairn area took part in some outdoor/sporting activities on their visit (56%), with low level walking (46%) easily the most popular individual activity;
- Nine in ten visitors (92%) undertook general sightseeing or touring, over two thirds went shopping (69%), whilst over half visited museums, art galleries and heritage centres (55%);
- The most popular attraction in the Inverness, Loch Ness and Nairn area was Culloden Visitor Centre (41% of respondents visited), followed by Urquhart Castle (32%), Cawdor Castle (32%), the Official Loch Ness Monster Exhibition (27%), and Fort Augustus Abbey (26%);
- Satisfaction levels with attractions visited in the Highlands were very high: over half (54%) described the quality of service as “very good”, whilst 48% described the facilities on offer in similar terms;

- Just under two thirds of respondents had visited or intended visiting a TIC on their trip to the Highlands (63%). Again, levels of satisfaction with both the quality of service and facilities in Highland TICs were very high;
- Just over four in ten visitors claimed they had known a little about the Inverness, Loch Ness and Nairn area (43%). Over a quarter said they had known less than that (26%), whilst 31% claimed to have known more than that;
- Over a third of visitors described their trip to the Inverness, Loch Ness and Nairn area as better than expected (34%). The weather, scenery and the fact there was more to do than they had anticipated were the main reasons for this response. Encouragingly, only 1% described their visit as having been worse than expected;
- Around half could not think of any improvements which the local bodies responsible for tourism could have made which would have made their trip more enjoyable (48%). Amongst those who did feel improvements could have been made, no single improvement was mentioned by more than 8% of respondents;
- Typically, visitors to the Inverness, Loch Ness and Nairn area spent just under £100 per day on themselves and others in their party. This resulted in an average spend of £43 per person per day.
- From some multivariate analysis of the data, it is clear that the Inverness, Loch Ness and Nairn area was particularly popular amongst visitors from outwith Scotland – the four segments most likely to visit this area were all from overseas or other UK origins. In addition, three of these four segments had never been to the Highlands before, suggesting this part of the Highlands is popular amongst those making their first trip to the Highlands.

## 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, over 2.7 million tourist trips were made to the area by both UK and overseas tourists.

**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 the **Area Tourist Boards (ATBs)** 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 in the Inverness, Loch Ness and Nairn area. Similar reports have been produced to cover the other parts of the Highlands, namely: Caithness, Sutherland, Ross and Cromarty, Moray, Badenoch and Strathspey, Isle of Skye and Lochalsh and Lochaber. In addition, a separate report has been produced covering the Highlands as a whole which provides a combination of the findings from each of the local areas.

### **Definition of Visitors**

The survey covered all visitors to the Highlands 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 Highlands.

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 Highlands 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 3,301 interviews were undertaken throughout the Highlands during the March to November period. Some 555 interviews were undertaken in the Inverness, Loch Ness and Nairn area, and the interview sites used are indicated below in Table A-1.

**Table A-1 - Interview locations: Inverness, Loch Ness and Nairn area**  
Base: 555 interviews with visitors

	<b>Interviews undertaken</b>
Culloden Visitor Centre	96
Inverness town centre	95
Fort Augustus Abbey	93
Cawdor Castle, Nairn	92
Nairn town centre	90
Drumnadrochit village	89
<b>Total:</b>	<b>555</b>

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. Inverness), 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 **555 completed interviews** in the area represents a large and suitably robust sample for analysis of the characteristics of visits made to the Inverness, Loch Ness and Nairn area in 1997: at the 95% levels of confidence, results are accurate to plus or minus 4.2%. 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 in the Inverness, Loch Ness and Nairn areas is indicated below:

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

Base: 555 interviews with visitors to Inverness, Loch Ness and Nairn

	<b>Interviews undertaken</b>		<b>Interviews undertaken</b>
Monday	15	March/April	6
Tuesday	14	May	7
Wednesday	14	June	11
Thursday	14	July	26
Friday	6	August	26
Saturday	17	September	12
Sunday	20	October	7
		November	4
<b>Total</b>	<b>100</b>	<b>Total</b>	<b>100</b>

Some 37% of the interviews were conducted at the weekend, reflecting the large number of visits made to tourist attractions and sites at that time of the week. Similarly, over half of the interviews were conducted during July and August to reflect the seasonal nature of tourism in the Highlands. Around a quarter of the interviews were undertaken during the March/April/May and October/November periods (24%) 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 Inverness, Loch Ness and Nairn area follows in Section B. Where appropriate, comparisons have been made with the overall findings

for the Highlands as a whole. Multivariate analysis of the Inverness, Loch Ness and Nairn datasets was also undertaken in order to identify the key market segments for the area. The results of this exercise are described in Section C.

## B. Main Findings

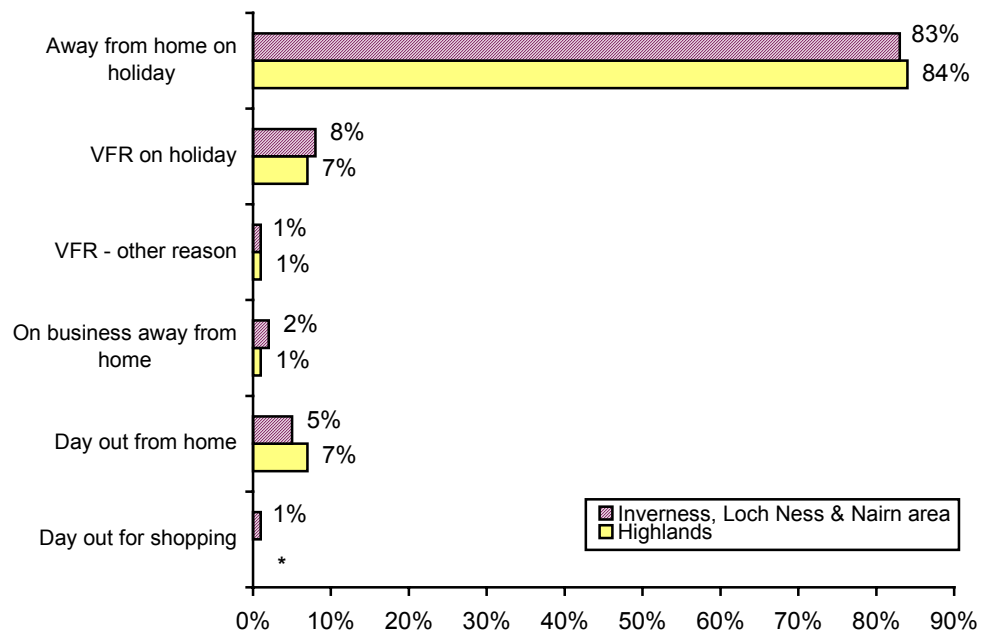
### Reasons for Visiting

#### *Purpose of Visit*

The overwhelming majority of visitors to the Inverness, Loch Ness and Nairn area were staying away from home overnight (94%) - a similar proportion to that recorded in the Highlands as a whole (93%). The main types of trips taken in the area, together with the comparable figures for the Highlands as a whole, are summarised in Figure B-1 below:

**Figure B-1 - Purpose of Visit: Inverness, Loch Ness & Nairn**

Base: 555 visitors to Inverness, Loch Ness & Nairn;  
3,301 visitors to the Highlands



\* - less than 0.5%

The vast majority of visitors to the Inverness, Loch Ness and Nairn area were away from home on holiday (83%), a similar proportion to that in the Highlands as a whole (84%). Visiting friends and relatives was the main purpose amongst 9% of the visitors, whilst day trips from home accounted for around 6% of visitors to the area.

There were some minor variations in this purpose of trip profile to the Inverness, Loch Ness and Nairn area amongst the different market segments:

- a higher proportion of C2DEs visiting the area were day trippers (9%) than amongst ABC1s (3%). Conversely, ABC1s were rather more likely to be on holiday (85%) than C2DEs (77%);
- as would be expected, from July to September, the busy majority of visitors were on holiday (87%). In contrast, holiday visitors accounted for between 74% and 77% of visitors to the area between March and June and in October and November. The proportion of day trippers increased during these months to 8-9%;
- those aged 55+ years and those aged 15-34 years were slightly more likely to be on holiday in the area (84% and 83% respectively) than those aged 35-54 years (81%).

#### *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 Highlands (%)**

Base: 502 visitors to Inverness, Loch Ness & Nairn staying away from home;  
2,936 visitors to the Highlands staying away from home

	<b>Overnight visitors to Inverness area</b>	<b>Overnight visitors to Highlands</b>
- Staying in one main location in the Highlands and taking day trips from there	54	53
- Staying in 2 or 3 locations during visit to the Highlands	30	29
- Touring around the Highlands, staying in more than 3 locations	15	17
- Other	1	*
<b>Total:</b>	<b>100</b>	<b>100</b>

Note: \* - less than 0.5%

The majority of trips taken in the Highlands were not touring in nature: over half of those staying away from home in the Inverness, Loch Ness and Nairn area were staying in one main location in the Highlands and taking day trips from there (54%), a very similar proportion to the average over the Highlands as a whole (53%). Around three in ten were staying in two or three locations

in the Highlands (30%), whilst the remaining 15% were touring around, staying in more than three locations.

There were some major variations in the types of trips taken by different market segments in the Inverness, Loch Ness and Nairn area:

- *Age:* those aged under 35 years were more likely to be touring than those aged 35-54 and 55+ years: 57% of those aged 15-34 years were staying in two or more locations, compared with 39% of each of the older age groups;
- *Social Class:* C2DEs were more likely to be staying in just one location in the Highlands (65%) than ABC1s (48%);
- *Origin:* three quarters of Scots visitors (75%), and two thirds of other UK visitors (67%) were staying in only one location in the Highlands compared with around a quarter of overseas visitors (26%). Overseas visitors were therefore, considerably more likely to be touring - 45% stayed in two or three locations, and 28% stayed in even more than this;
- *Previous visits:* those on their first ever trip to the Highlands were more likely to be touring (60%), than those who had visited before (33%);
- *Length of Stay:* those staying in the Highlands for three nights or less were rather more likely to be staying in only one location (56%), than those who were in the Highlands for more than a week (41%). This latter group were more likely to be on a touring holiday than those staying for 1-3 nights - 31% and 3% respectively.

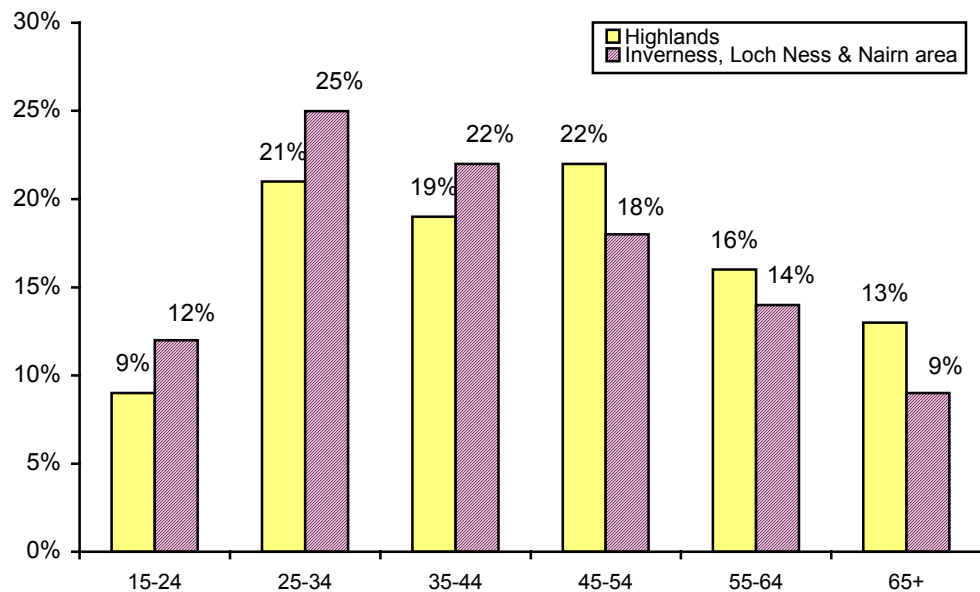
## Visitor Profile

### Age

The age groups of visitors to the Inverness, Loch Ness and Nairn area are indicated in Figure B-2 below:

**Figure B-2 - Age of Visitors to Inverness, Loch Ness & Nairn**

Base: 555 visitors to Inverness, Loch Ness & Nairn;  
3,301 visitors to the Highlands



The age profile of visitors to the Inverness, Loch Ness and Nairn area is relatively young compared with the profile of tourists visiting Scotland as a whole: 37% of visitors to the area were under 35 years, compared with around 30% of tourists to Scotland (UKTS and IPS estimates).

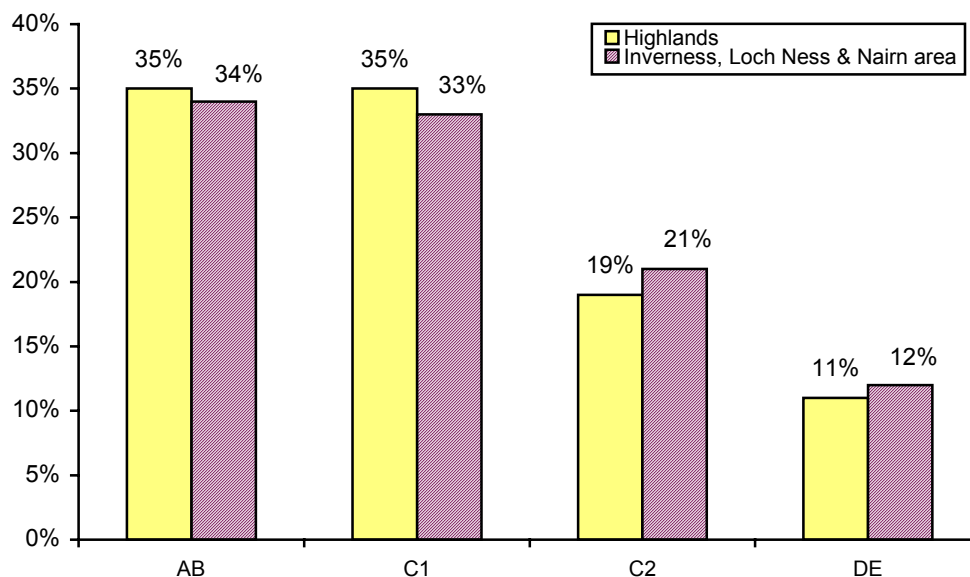
There is also evidence from the survey that visitors to the Inverness, Loch Ness and Nairn area are slightly younger in profile than visitors to the Highlands as a whole: just under four in ten visitors were aged under 35 years (37%), compared with only 30% of visitors to the Highlands as a whole. Conversely, whilst three in ten visitors to the Highlands as a whole were aged 55+ years (29%), less than a quarter of visitors to Inverness, Loch Ness and Nairn were in this age grouping (23%).

The age profile of visitors to the Inverness, Loch Ness and Nairn area varied markedly by different categories of visitor:

- *Type of trip:* a larger proportion of those on a touring trip to the Highlands were under 35 years (45%) than those staying in the one location (30%);
- *Accommodation:* visitors staying in bed and breakfast establishments tended to be younger than those staying in hotels (41% and 25% respectively, were aged under 35);
- *Origin:* overseas visitors tended to be younger than their UK counterparts: almost half of those from overseas were aged under 35 years (48%) compared with 34% of Scots visitors and 27% of those from elsewhere in the UK;
- *Length of Stay:* 46% of those staying for 1-3 nights were aged under 35, compared with 32% of those who stayed longer;
- *Previous visits:* those on a repeat visit to the Highlands were more likely to be older than those visiting for the first time (31% and 16% respectively were aged over 55 years).

*Social Class***Figure B-3 - Social Class of visitors to the Inverness, Loch Ness and Nairn area**

Base: 555 visitors to Inverness, Loch Ness & Nairn;  
3,301 visitors to the Highlands



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

As with visitors to the Highlands as a whole, those visiting the Inverness, Loch Ness and Nairn area are very upmarket in their profile: around two thirds of visitors to the area were ABC1s (67%). 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 Inverness area is very similar to that for Scotland as a whole (from the United Kingdom Tourism Survey). Those categories of visitors **more likely to be ABC1s** in the Inverness, Loch Ness and Nairn area included:

- those aged under 35 (69%), those on a touring holiday (77%), those staying in hotels (78%) and bed and breakfasts (75%), those on their first visit to the Highlands (76%), and visitors from overseas (81%).

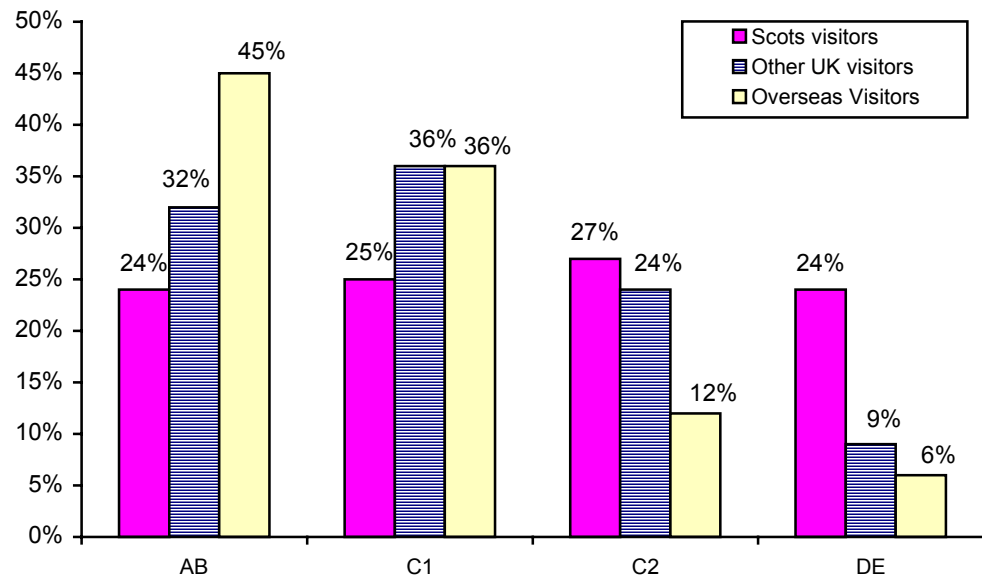
The following segments were **more likely to be C2DEs**:

- those aged 55+ years (38%), those staying in one location (39%), visitors who were camping/caravanning (44%), UK visitors (44%) and those on a return trip (39%).

The social class breakdown varied markedly by origin of visitors, with overseas visitors to the Inverness, Loch Ness and Nairn area considerably more likely to be ABC1s than visitors from Scotland or other parts of the UK:

**Figure B-4 - Social Class of visitors by region of origin**

Base: 555 visitors to Inverness, Loch Ness & Nairn;



#### *Party size and composition*

Less than one in ten (7%) visitors to the Inverness, Loch Ness and Nairn area were visiting alone. Over half of the visitors were with one other person (52%), whilst as many as 30% had four or more people in their party. The average party size amongst visitors to the area was **2.92 people**, a slightly higher proportion than in the Highlands as a whole (2.76 people).

Visitors aged 35-44 years had slightly larger party sizes (3.24 people), probably a reflection of there being more family groups within this age category. Those on a touring holiday were in smaller parties (2.4 people) than visitors staying in the one location (3.25 people). There were also variations by accommodation type - those staying in self-catering accommodation were in larger parties (4.34 people) than those staying in bed and breakfast establishments and hotels (2.55 and 2.64 people respectively).

The composition of these groups is illustrated below:

**Table B-2 - Party Composition in Inverness, Loch Ness and Nairn area (%)**

Base: 555 visitors to Inverness, Loch Ness & Nairn;  
3,301 visitors to the Highlands

	Inverness, Loch Ness & Nairn	Highlands
<b>Adults, no children under 18 years</b>	<b>76</b>	<b>79</b>
- one adult, no children under 18 years	7	7
- two adults, no children under 18 years	51	56
- more than two adults, no children under 18 years	18	16
<b>Adults with children under 18 years</b>	<b>24</b>	<b>21</b>
<b>Total:</b>	<b>100</b>	<b>100</b>

The slightly larger average party size in the Inverness, Loch Ness and Nairn area compared to the Highlands as a whole, would appear to be a reflection of the larger proportion of visitors who had children with them (24%, compared with 21% in the Highlands as a whole). Despite that, the most common party composition in the area consisted of two adults and no children (51%).

As would be expected, a larger proportion of those aged 35-54 years had children with them (37%) than amongst those aged under 35 (18%) and those aged 55+ years (9%). Others more likely to have children with them included those on a centred holiday (31%), and visitors who were self-catering or camping and caravanning (37%). Visitors to the Inverness, Loch Ness and Nairn area from overseas were rather less likely to have children with them (14%) than visitors from Scotland (32%) or other parts of the UK (26%).

*Origin of Visitors*

The origin of visitors to the Inverness, Loch Ness and Nairn area is indicated in Table B-3 below:

**Table B-3 - Origin of Visitors to Inverness, Loch Ness and Nairn (%)**

Base: 555 visitors to Inverness, Loch Ness & Nairn;  
3,301 visitors to the Highlands

	Inverness, L. Ness & Nairn		Highlands	
	All visitors	Holiday visitors	All visitors	Holiday visitors
<b>Scotland</b>	<b>26</b>	<b>20</b>	<b>32</b>	<b>26</b>
- Glasgow and Clyde Valley	7	7	7	7
- Aberdeen & Grampian	4	3	6	4
- Edinburgh & Lothian	4	4	5	5
- Inverness area	2	-	2	*
- Fife	2	2	2	2
- Moray	2	-	1	*
- Other Scotland	5	4	9	8
<b>England</b>	<b>37</b>	<b>40</b>	<b>39</b>	<b>42</b>
- South East	15	16	13	14
- North	8	9	9	10
- Midlands	7	8	7	8
- North West	5	5	6	7
- South West	2	2	3	3
<b>Other UK</b>	<b>3</b>	<b>3</b>	<b>2</b>	<b>2</b>
<b>Overseas</b>	<b>34</b>	<b>37</b>	<b>27</b>	<b>30</b>
- USA	7	8	5	6
- Germany	6	7	5	6
- Australia	4	4	3	3
- Netherlands	3	3	2	2
- Canada	2	2	2	2
- Belgium	2	2	1	1
- Other overseas	9	10	9	10
<b>Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

Note: \* - less than 0.5%

Just over a quarter of all visitors to the Inverness, Loch Ness and Nairn area were from Scotland (26%), around four in ten were from elsewhere in the United Kingdom (40%), and the remaining third were from overseas locations (34%). In comparison with the Highlands overall, a larger proportion of visitors to the Inverness, Loch Ness and Nairn area were from overseas (34% as opposed to 27%), whilst correspondingly smaller proportions of visitors to this area were from Scotland (26% as opposed to 32%).

When overnight holiday visitors are analysed separately, as would be expected, the proportion of non-Scots visitors increases. Whereas 74% of all visitors (day trippers and tourists) were from outwith Scotland, 80% of those staying overnight on holiday came from outwith Scotland.

The main population centre of the South East of England was the biggest regional market for the area, 15% of all visitors and 16% of holiday visitors coming from there. Combined, the North and North West of England were also particularly important, accounting for 13% of visitors (14% of holidaymakers). Amongst Scots, the areas centred around the three main cities accounted for the largest proportion of visitors: 7%, 4% and 4% of visitors respectively were from the Glasgow, Edinburgh and Aberdeen areas. In terms of overseas markets, the United States of America and Germany were the two key markets for this area, with 8% and 7% respectively of holiday visitors coming from these countries.

By concentrating primarily on overnight holiday visitors to the area, it is possible to compare the profile of visitors to Inverness, Loch Ness and Nairn 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. Although 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, it would still appear that the Inverness, Loch Ness and Nairn area attracted a 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 5% or more Inverness, Loch Ness and Nairn area respondents are outlined in Table B-4 below:

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

Base: 555 visitors to Inverness, Loch Ness & Nairn;  
3,301 visitors to the Highlands

	Inverness, Loch Ness & Nairn	Highlands
Scenery/scenic views/beauty/unspoilt	26	22
Never been before/always wanted to come	18	14
Mountains and hills/landscape	15	12
General sightseeing/day out	14	13
Been before/know area	14	18
Family/friends/connections in the area	11	12
Like area/enjoy it	10	12
Lochs/Loch Ness	10	4
Peace and quiet/tranquillity/relaxing/remote	10	13
History	7	3
Mentions of specific attractions	6	8
House here/time-share	6	6
Wildlife/nature/flora and fauna	6	6
Because of the people/friendly people	5	4
Coastline/countryside/beaches	5	3
Walks/walking opportunities	5	6
<b>Total:</b>	<b>100</b>	<b>100</b>

Most of the reasons for their visit provided by respondents in the Inverness, Loch Ness and Nairn area related to aspects of the Highland 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 are close similarities in the reasons for their visit provided by visitors to the Inverness, Loch Ness and Nairn area to those for the Highlands as a whole. However a slightly larger proportion of visitors to this area would appear to have been attracted to visit having never been before (18% and 14% respectively) as opposed to those whose main reason for visiting was they had been previously (14% in the Inverness area, 18% in the Highlands generally). Also, the scenery would appear to have been slightly more important amongst

visitors to the Inverness, Loch Ness and Nairn area (26%) than generally (22%).

Peace and quiet was also a less common reason in the Inverness, Loch Ness and Nairn area (10%) than in the Highlands as a whole (13%), whilst the attraction of lochs, and Loch Ness in particular, made this a more important reason for visiting amongst respondents in this area than in the Highlands generally (10% and 4% respectively).

As would be expected, there were variations in the motivations for visiting amongst the key market sectors visiting the Inverness, Loch Ness and Nairn area:

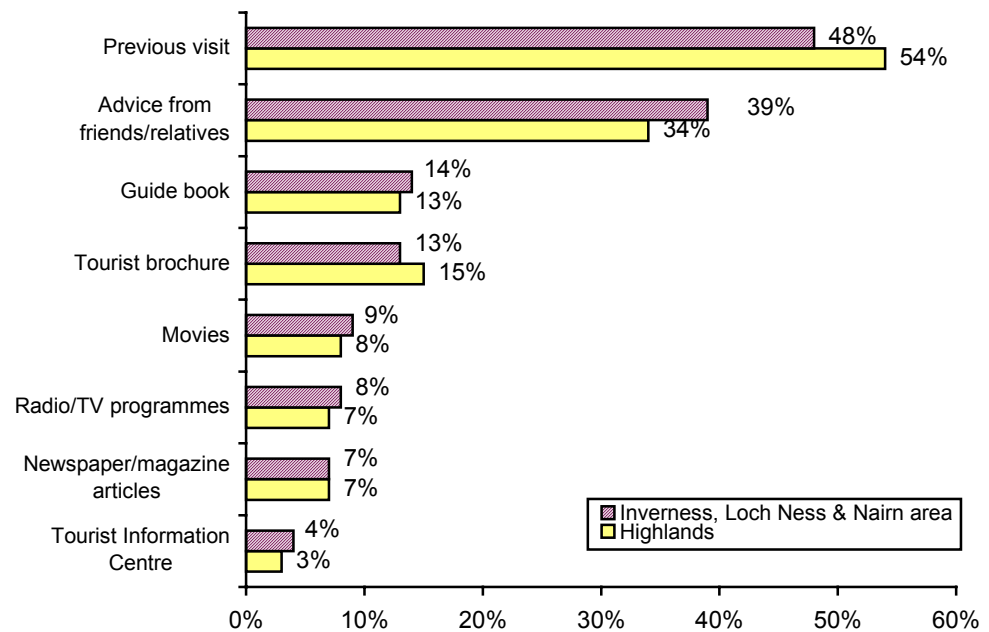
- *Scenery/scenic views/beauty/unspoilt (26% overall)*: more important amongst those aged under 35 years (34%) and those on a touring trip (34%);
- *Never been before/always wanted to come (18% overall)*: more important amongst those staying in hotels (26%) or in self catering accommodation (25%), those visiting between July and September (21%), amongst overseas visitors (21%) and amongst those on a short break of 1 to 3 nights duration (24%). One third (33%) of those on their first visit to the Highlands described this as their main reason for visiting;
- *Mountains and hills/landscape (15% overall)*: more important amongst those aged under 35 years (21%), those on a touring holiday (19%), and amongst overseas visitors (21%);
- *General sightseeing/day out (14% overall)*: more important amongst those aged 55+ years (17%), those staying in hotels/guesthouses (19%), and amongst those on a short break of 1-3 nights (20%).

### *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-5):

**Figure B-5 - Influences on the decision to visit the Highlands (%)**

Base: 555 visitors to Inverness, Loch Ness & Nairn;  
3,301 visitors to the Highlands



Two key influences emerged amongst visitors to the Inverness, Loch Ness and Nairn area: a previous visit(s) to the area (48%), and advice from friends or relatives (39%). All other influences were mentioned by no more than one in seven respondents.

Clearly therefore, “informal” information sources were more important influencing factors than “formal” sources: 14% and 13% respectively mentioned guidebooks and tourist brochures, whilst visits to Tourist Information Centres would only appear to have influenced 4% of those interviewed in the Inverness, Loch Ness and Nairn area.

In terms of influences on their visit, the main difference between those interviewed in the Inverness, Loch Ness and Nairn area and those interviewed throughout the Highlands would appear to be that a larger proportion of those interviewed in the Inverness, Loch Ness and Nairn area had been persuaded to

visit as a result of advice from friends or relatives (39% compared with 34% in the Highlands as a whole). As was suggested in the analysis of the main reason for visiting, a smaller proportion of visitors interviewed in the Inverness, Loch Ness and Nairn area were influenced by a previous visit (48%) than generally (54%), suggesting a larger proportion of first time visitors to the area. This is confirmed in Figure B-6 on page 23.

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

***Scots visitors:***

Previous visit	- 77%
Advice - friends/relatives	- 18%
Tourist Brochure(s)	- 7%
Guide book	- 4%
Radio/TV programme	- 3%

***Other UK visitors:***

Previous visit	- 50%
Advice - friends/relatives	- 41%
Tourist Brochure(s)	- 16%
Radio/TV programme	- 9%
Guide book	- 8%

***Overseas visitors:***

Advice - friends/relatives	- 53%
Guide book	- 31%
Previous visit	- 21%
Movies/films	- 18%
Tourist Brochure(s)	- 17%

Clearly, amongst Scots visiting the Inverness, Loch Ness and Nairn area, previous visits to the Highlands were the major influence on their decision to visit this time - all other influences were relatively minor, although 18% mentioned advice from friends/relatives. Visitors from other parts of the UK were less likely to have been before, and hence advice from others was more important. For overseas visitors, advice from friends and relatives was the main influencing factor on their decision to visit, although almost a third of them decided to visit having read guidebooks (31%).

*Use of tourist brochures*

In total around 13% of those interviewed in the Inverness, Loch Ness and Nairn area had been influenced to visit by tourist brochures. Tourist

brochures were more influential in some markets than others: 20% of those on their first ever trip to the Highlands had been influenced by a tourist brochure as opposed to 8% of those who had been before. Also, whilst they had only influenced 7% of the trips by Scots residents, 16% and 17% of other UK and overseas visitors respectively had been influenced by brochures.

These respondents 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: 74 respondents in Inverness, Loch Ness and Nairn, influenced by brochure(s)  
507 respondents in the Highlands, influenced by brochure(s)

	Inverness, Loch Ness & Nairn	Highlands
Freedom of the Highlands (HOST)	36	32
Scotland - Main UK Guide (STB)	36	31
Scotland - Overseas Guide (STB)	34	31
6 Local Accommodation/ Visitor Guides (HOST)	12	14
None of these	22	39
<b>Total:</b>	<b>100</b>	<b>100</b>

Slightly larger proportions of visitors to the Inverness, Loch Ness and Nairn area who had been influenced by tourist brochures would appear to have been talking about one of the main HOST or STB brochures: just over one in five (22%) said they had not been influenced by any of these brochures compared with around two in five of those interviewed throughout the Highlands (39%).

### Length of Stay

Those respondents staying away from home were asked to indicate how many nights they would be in Scotland, how many nights in the Highlands, and how many nights in the Inverness, Loch Ness and Nairn area:

**Table B-6 - Length of Stay (%)**

Base: 521 respondents in the Inverness, Loch Ness and Nairn area staying away from home

3,080 respondents in the Highlands staying away from home

	Inverness, L. Ness & Nairn			Highlands		
	In Scotland	In the Highlands	In the area	In Scotland	In the Highlands	In the area
None	-	4	25	-	5	22
One	2	4	17	2	4	14
Two	5	12	17	5	9	16
Three	7	12	10	7	10	11
Four	7	10	6	7	9	7
Five	6	7	5	5	8	5
Six	9	8	3	7	8	4
Seven	20	19	10	19	19	11
Eight - Thirteen	19	11	3	20	15	4
Fourteen	15	9	4	15	8	4
Fifteen or more	11	4	1	14	5	2
<b>Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Average</b>	<b>9.3 nights</b>	<b>6.5 nights</b>	<b>3.4 nights</b>	<b>10.0 nights</b>	<b>7.0 nights</b>	<b>3.9 nights</b>

Typically, tourists in the Inverness, Loch Ness and Nairn area were staying in Scotland for 9.3 nights, in the Highlands for 6.5 nights, and in the Inverness, Loch Ness and Nairn area for 3.4 nights. These lengths of stay are slightly shorter than the average for tourists in the Highlands as a whole (10.0, 7.0 and 3.9 nights respectively). Three quarters of those tourists interviewed in the Inverness, Loch Ness and Nairn area were staying overnight in the area (75%). This is a slightly smaller proportion than the average across the other areas of the Highlands where 78% of tourists were staying overnight locally.

Length of stay in the Highlands in general and in the Inverness, Loch Ness and Nairn area in particular, varied amongst the different types of visitor:

- Older visitors stayed for a longer period than younger visitors: the average durations of stay amongst the over 55s in the Highlands and the Inverness, Loch Ness and Nairn area were 7.0 and 3.9 nights respectively. The comparable lengths of stay for those under 35 years were 6.1 and 3.0 nights respectively;
- C2DEs stayed longer in the Highlands and the local area (7.7 and 4.6 nights respectively) than ABC1s (5.9 and 2.8 nights);
- Those respondents touring around and staying in more than three locations not surprisingly stayed longer in the Highlands than those staying in the one location (9.2 nights as opposed to 6.2 nights). Conversely, tourers did not stay so long in the Inverness, Loch Ness and Nairn area as those who were only staying there (2.2 nights and 4.0 nights respectively);
- Visitors who were camping and caravanning stayed considerably longer (10.2 nights in the Highlands, 6.0 nights in the local area) than those staying in hotels and guesthouses (4.9 and 1.8 nights respectively);
- Length of stay away from home varied significantly by origin: overseas visitors were typically away from home for 11.8 nights, compared with 8.5 nights for visitors from other parts of the UK, and 6.8 nights amongst Scots;
- In terms of trip length in the Highlands as a whole, there were no significant differences in length of stay amongst Scots, other UK and overseas visitors (all around 6.3 to 6.6 nights). However, length of stay in the Inverness, Loch Ness and Nairn area varied markedly by origin: Scots stayed longer (4.7 nights) than visitors from elsewhere in the UK (3.4 nights) and those from overseas (2.5 nights);
- First time visitors tended to stay for a slightly shorter period than those who had been before (6.8 and 6.3 nights respectively in the Highlands; 3.9 and 2.9 nights in the Inverness, Loch Ness and Nairn area).

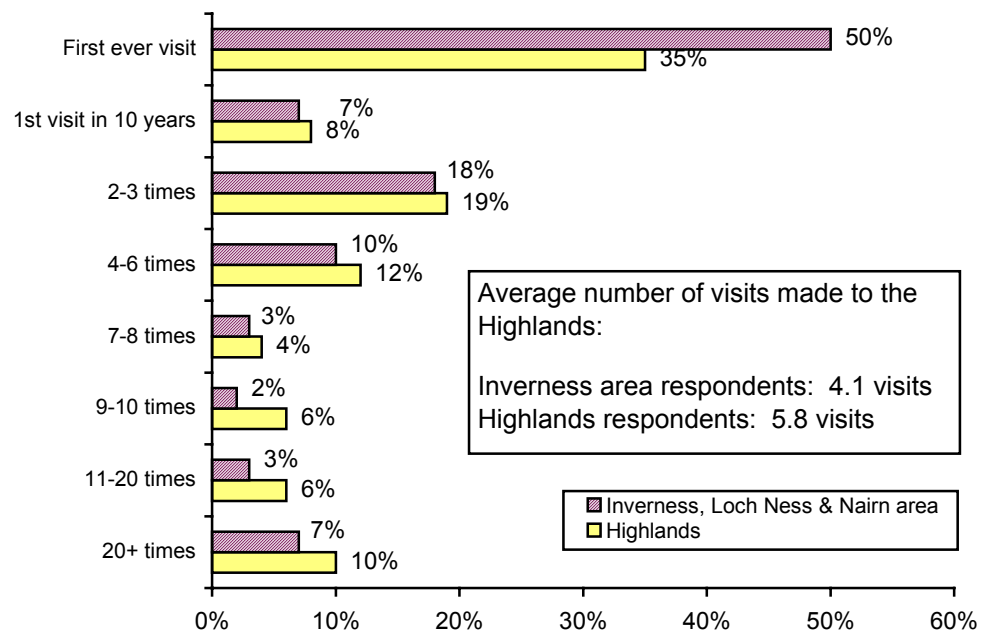
## Previous Visits

### *Previous visits to the Highlands*

Respondents' previous experience of the Scottish Highlands is indicated in Figure B-6 below:

**Figure B-6 - Number of visits to the Highlands (including this one)**

Base: 522 non-Highland residents in the Inverness, Loch Ness and Nairn area  
3,120 non-Highland residents in the Highlands



Around half of the visitors to the Inverness, Loch Ness and Nairn area were on their first ever visit to the Highlands (50%), a significantly higher proportion than the average for the Highlands as a whole (35%). This suggests that this area represents one of the first parts of the Highlands that a “new” tourist is likely to visit. There are however a large number of loyal, repeat visitors who have made many trips to the Highlands before: around a quarter of those interviewed had been in the Highlands four or more times previously (25%).

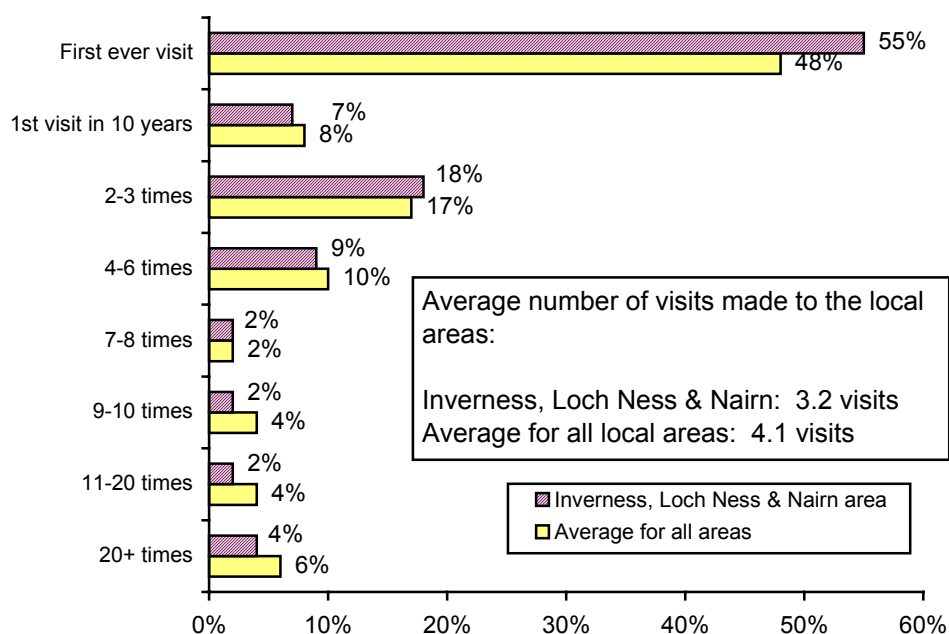
As would be expected, those aged 55+ years were more likely to have been to the Highlands before than those aged under 35 years (66% and 35% respectively were on repeat trips). C2DEs (63%) were also more likely to have been before than ABC1s (45%), whilst those on a centred break were also more likely to have been before (63%) than those on a touring holiday (36%).

Again, as would be expected, the incidence of previous trips to the Highlands decreased with distance: 82% of overseas visitors interviewed in the Inverness, Loch Ness and Nairn area were on their first ever trip to the Highlands compared to 44% of visitors from England, Wales and Northern Ireland and only 8% of Scots.

*Previous visits to Inverness, Loch Ness and Nairn area*

**Figure B-7 - Number of visits to Inverness, Loch Ness & Nairn (including this one)**

Base: 522 non-Highland residents in the Inverness, Loch Ness and Nairn area  
3,120 non-Highland residents in the Highlands



Over half of those interviewed in the Inverness, Loch Ness and Nairn area were on their first ever visit to the area (55%). Again, this is a slightly higher proportion of first-time visitors than the average across the Highlands (48%).

Again, those aged 55+ years are more likely to have been to the Inverness, Loch Ness and Nairn area before than those aged under 35 years (60% and 31% respectively were on repeat trips), whilst C2DEs (56%) were also rather more likely to have been before than ABC1s (40%). Also, those on a centred break were more likely to have been to the area before (56%) than those on a touring holiday (30%).

85% of overseas visitors interviewed in the Inverness, Loch Ness and Nairn area were on their first ever trip to the area compared to 51% of visitors from other parts of the United Kingdom and 14% of Scots visitors.

### Visits to other parts of the Highlands

Visitors were asked to indicate which other parts of the Highlands they would be visiting on their trip, and in which areas they would be staying overnight (see Table B-7 ) below:

**Table B-7 - Areas Visited/Stayed in by visitors to Inverness, Loch Ness & Nairn (%)**

Base: 555 visitors to Inverness, Loch Ness & Nairn;

502 visitors to Inverness, Loch Ness & Nairn, staying overnight in Highlands

	Areas visited	Areas Stayed in
Inverness, Loch Ness and Nairn	100	73
Lochaber	45	28
Isle of Skye and Lochalsh	31	19
Badenoch and Strathspey	30	13
Easter Ross	28	8
Moray	25	7
Wester Ross	21	12
Sutherland	15	7
Caithness	11	6
Orkney	2	1
Western Isles	1	*
<b>Total:</b>	<b>100</b>	<b>100</b>

Note - (\*) - less than 0.5%

Almost half of those visitors interviewed in the Inverness, Loch Ness and Nairn area were also visiting the Lochaber area on their trip (45%), making this the most popular other area of the Highlands amongst visitors to this area. Just under a third were visiting Skye (31%), and a similar proportion were visiting the Badenoch and Strathspey area (30%). Not surprisingly, those areas furthest to the north, Sutherland and Caithness, were the least likely mainland parts of the Highlands to be visited on this trip by those in the Inverness, Loch Ness and Nairn area (15% and 11% respectively). Only a very small proportion of visitors intended travelling to either the Western Isles or Northern Isles on this visit (1% and 2% respectively).

Amongst those interviewed in the Inverness, Loch Ness and Nairn area who were staying at least one night in the Highlands, almost three quarters were staying locally for at least part of their trip (73%). Again, Lochaber (28%), the

Isle of Skye (18%) and Badenoch and Strathspey (13%) were the most popular other areas where visitors to this part of the Highlands chose to stay overnight. As many as 12% also planned to stay in Wester Ross however, a more popular overnight destination than Easter Ross (8%), the opposite situation to those visiting these areas but not staying overnight.

Some market segments were more likely than others to be staying overnight in the Inverness, Loch Ness and Nairn area:

- those aged under 35 years (80%)
- those on a touring holiday (82%)
- those staying in caravans/camping (84%)
- overseas visitors (79%)
- first time visitors to the Highlands (76%)

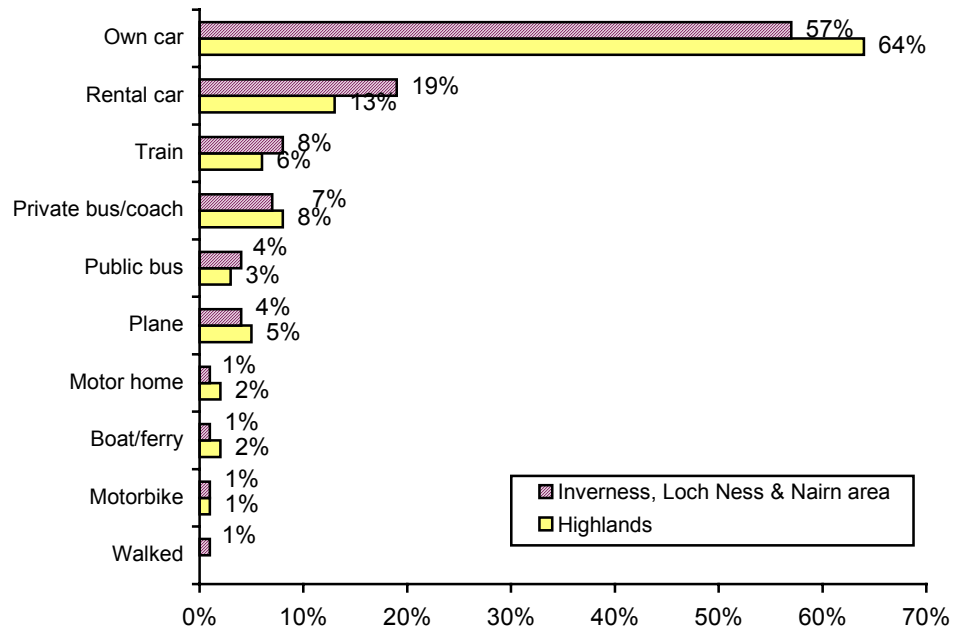
As would be expected, those visitors on a touring holiday were considerably more likely to be both visiting and staying in other parts of the Highlands than those on a centred holiday. Similarly, overseas visitors were rather more likely to visit and stay in other areas than their Scottish or other UK counterparts.

## Transport Used

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

**Figure B-8 - Forms of Transport used to get to the Highlands**

Base: 522 visitors to Inverness, Loch Ness and Nairn, non-resident in the Highlands  
3,120 visitors to the Highlands



Almost three visitors in five (57%) to the Inverness, Loch Ness and Nairn area used their own car on their journey to the Highlands. One in five (19%) used a rental car, whilst trains (8%), and coach tours (7%), were the only other forms of transport mentioned by more than 5% of respondents.

Despite the fact it is the dominant means of arriving in the Highlands, it would appear that visitors to the Inverness, Loch Ness and Nairn area are rather less likely than the Highland average to use their own car. They are correspondingly more likely to use a rental car and slightly more likely to arrive by train, reflecting the central position of Inverness in the rail network.

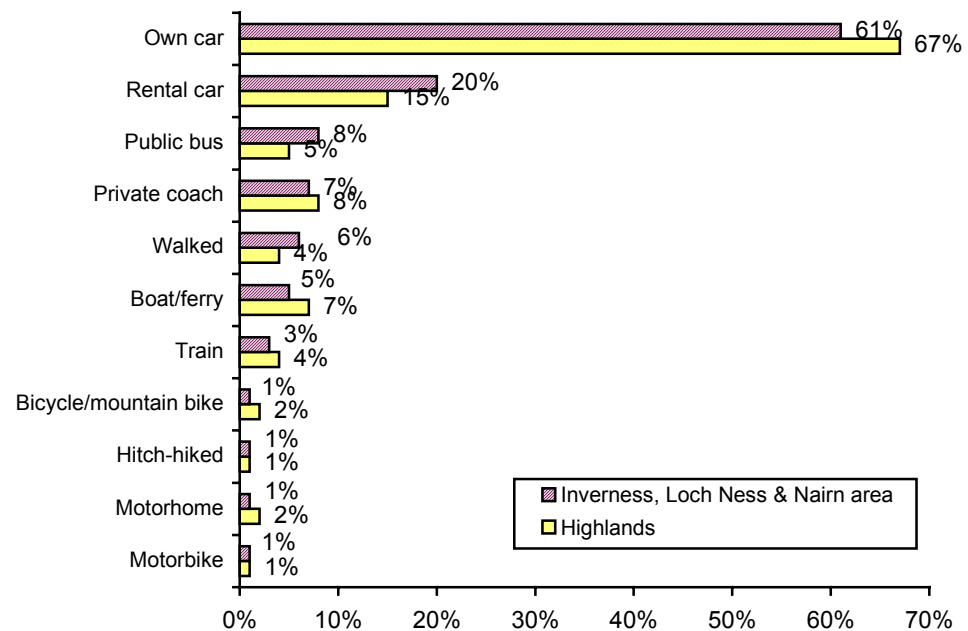
There are some variations in the forms of transport used amongst some of the key market segments:

- Under 35s: more likely to use rental cars (21%), trains (13%) and public buses (11%);
- Over 55s: more likely to be on a private coach tour (14%);
- ABC1s: more likely to arrive by hire car (23%);
- C2DEs: more likely to use their own car to get there (63%);
- Touring holidays: more likely to arrive by rental car (32%);
- Those based in one location: more likely to use their own car to get there (66%);
- Scots visitors: most likely to arrive with their own car (86%);
- Overseas visitors: more likely to use rental cars on their journey to the Highlands (44%).

The types of transport used by visitors **whilst in the Highlands** is indicated in Figure B-9 below:

**Figure B-9 - Forms of Transport used whilst in the Highlands**

Base: 555 visitors to Inverness, Loch Ness & Nairn  
3,301 visitors to the Highlands



Around three in five visitors to the Inverness, Loch Ness and Nairn area used their own car to travel around the Highlands (61%), making this the main form of transport used during their visit. Other than the 20% of visitors to the area who hired a car, all other forms of transport were used by less than 10% of visitors to the Highlands.

Compared with the Highlands as a whole, slightly larger proportions of visitors to the Inverness, Loch Ness and Nairn area used hire cars, and public buses during their visit, whilst smaller proportions used their own car.

## Accommodation

### *Accommodation used in the Highlands*

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

**Table B-8 - Accommodation used in the Highlands (%)**

Base: 502 visitors to Inverness, Loch Ness & Nairn, staying overnight in Highlands  
2,936 visitors to the Highlands staying overnight in the Highlands

	Inverness, Loch Ness & Nairn	Highlands
Bed and Breakfast	34	28
Hotel/motel	22	25
Rented house/flat/cottage	12	15
Tent	9	11
Staying with friends and relatives	8	9
Youth Hostel	7	6
Static caravan - rented	6	4
Guest house	4	5
Touring caravan	3	5
Static caravan - owned	2	1
Other hostel/bunkhouse	1	1
Timeshare	1	2
Motor caravan/camper van	1	2
Boat	1	*
<b>Total:</b>	<b>100</b>	<b>100</b>

Note - (\*) - less than 0.5%

Bed and breakfast establishments were the most popular forms of accommodation used by visitors to the Inverness, Loch Ness and Nairn area (34%). Hotels and motels were next most popular, stayed in by just under a quarter of overnight visitors (22%), and self-catering in flats, houses and cottages (12%) was the only other form of accommodation used by more than one visitors in ten. Around 9% of visitors were camping in the Inverness, Loch Ness and Nairn area, and this type of accommodation was particularly popular amongst those visitors from overseas (13%).

When compared with the Highlands as a whole, visitors to the Inverness, Loch Ness and Nairn area were rather more likely to be staying in bed and breakfast establishments or in rented static caravans, but rather less likely to stay in hotels, self catering accommodation or tents.

As would be expected, there were some major differences in the types of accommodation used amongst the different market segments visiting the Inverness, Loch Ness and Nairn area:

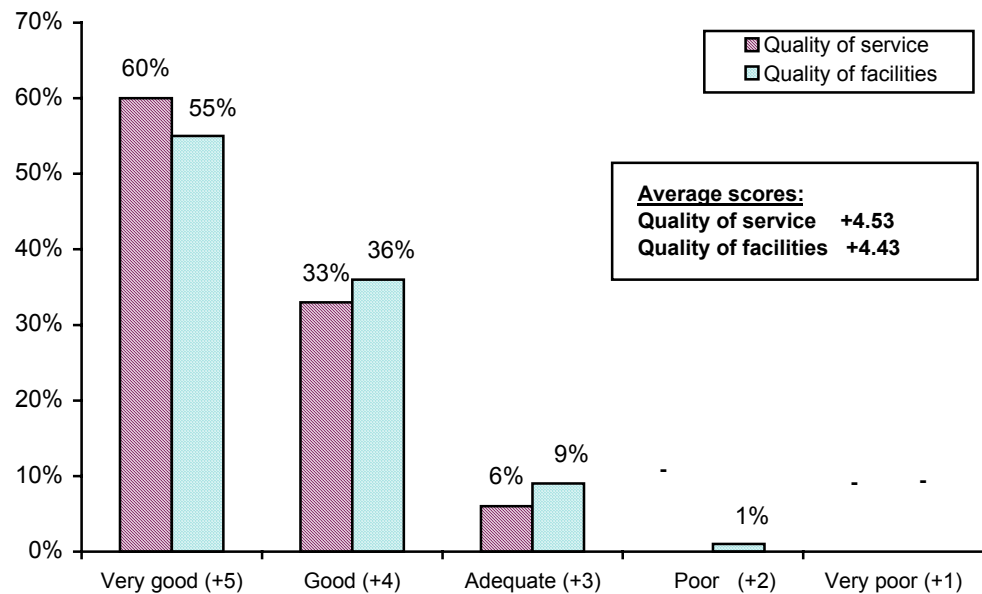
- Visitors aged 55+ years: more likely to stay in hotels/motels (32%) or in touring caravans (6%), and less likely to stay in youth hostels (1%);
- Visitors aged under 35 years: more likely to stay in bed and breakfast establishments (39%), tents (17%) and youth hostels (15%), but less likely to stay in hotels/motels (15%) or in self-catering accommodation;
- Social class: ABC1s are more likely to stay in bed and breakfast establishments (38%) and hotels/motels (24%) than C2DEs (27% and 16% respectively), but less likely to stay in self-catering accommodation (11%), in tents (7%), or with friends and relatives (7%), than C2DEs (14%, 13% and 10% respectively);
- Type of trip: those on a touring trip were more likely to be staying in bed and breakfast establishments (50%), guesthouses (7%), or in youth hostels (13%) than those staying in the one location (20%, 2% and 2% respectively). Conversely, tourers were less likely to stay in self-catering accommodation (2%), with friends and relatives (5%) or rented static caravans (2%) than those staying in the one location (10%, 11% and 10% respectively);
- Origin: over half of the overseas visitors stayed in bed and breakfast establishments (55%), compared to 26% of those from elsewhere in the UK and 18% of Scots. Overseas visitors were also more likely to stay in youth hostels (13%) than Scots (2%) and those from elsewhere in the UK (4%). Self catering accommodation was more popular amongst visitors from elsewhere in the UK (19%) than amongst overseas visitors (5%) as was staying in hotels/motels (24% compared to 19%) and with friends and relatives (10% and 4% respectively). Caravans were more popular amongst Scots visitors: 13% stayed in rented static caravans, 6% in their own static caravan and 11% in touring caravans;
- Length of Stay: bed and breakfast establishments (48%) and hotels/motels (30%) were considerably more popular forms of accommodation on 1-3 night breaks in the Highlands than on breaks of 8 or more nights (23% and 10% respectively).

*Levels of satisfaction with accommodation*

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

**Figure B-10 - Rating of accommodation used by visitors to Inverness, Loch Ness and Nairn (%)**

Base: 387 visitors to Inverness, Loch Ness & Nairn staying in commercial accommodation



Note: (-) - nil respondents

Satisfaction levels with their accommodation were generally very high amongst those visitors to the Inverness, Loch Ness and Nairn area who had stayed in commercial accommodation during their trip to the Highlands. Three in five (60%) described the quality of service as “very good”, whilst a further third (33%) described it as “good”. 6% felt the service had only been adequate, whilst no respondents felt it had been “poor” or “very poor”.

Satisfaction levels were also high regarding the quality of facilities experienced in their accommodation - 55% described them as “very good”, whilst a further 36% described them as “good”.

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 achieved a slightly higher score (+4.53) than the quality of facilities (+4.43), although the difference is barely significant.

In terms of the quality of service received, satisfaction levels were generally higher amongst those aged 55+ years (+4.63) and visitors from other parts of the UK (+4.62) and lower amongst those aged under 35 years (+4.44) and amongst visitors from overseas (+4.45). Similar patterns were evident in terms of their satisfaction with the facilities on offer. These lower levels of satisfaction amongst overseas visitors are a feature which has been evident in other visitor surveys within Scotland, and indeed, elsewhere in the UK.

### 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 by more than 2% of respondents interviewed in the Inverness, Loch Ness and Nairn area are summarised in Table B-9:

**Table B-9 - Activities undertaken in the Highlands (%)**

Base: 555 visitors to Inverness, Loch Ness & Nairn  
3,301 visitors to the Highlands

	Activities undertaken		Main activity	
	Inverness area	Highlands area	Inverness area	Highlands area
<b>Any Sporting activities</b>	<b>56</b>	<b>59</b>	<b>13</b>	<b>17</b>
Low level walking of 2-8 miles	46	47	7	8
Hill walking/low level walks >8mi	10	11	3	3
Cycling/mountain biking	8	8	1	1
Golf	8	6	1	1
Game Fishing	4	5	*	1
Water sports	4	4	*	*
Horse riding/pony trekking	4	3	*	*
Mountaineering/rock climbing	3	4	1	1
<b>No sporting activities</b>	<b>44</b>	<b>41</b>	<b>87</b>	<b>83</b>
<b>Any non-sporting activities</b>	<b>99</b>	<b>98</b>	<b>86</b>	<b>82</b>
General sightseeing/touring	92	91	77	75
Shopping	69	58	3	2
Museum/art gallery/heritage cen.	55	42	1	1
Wildlife attraction	21	25	*	1
Archaeological site	21	17	*	*
Leisure centre/swimming pool	18	14	1	*
Concert/ceilidh/theatre/cinema	12	11	*	*
Other cultural event	4	5	-	*
Other local event	4	6	-	*
Family tree/genealogy research	3	2	-	*
<b>No non-sporting activities</b>	<b>1</b>	<b>2</b>	<b>14</b>	<b>18</b>
<b>Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

\* - less than 0.5%

Whilst just over half of those interviewed in the Inverness, Loch Ness and Nairn area indicated that they had taken part in some sporting/outdoor activities during their trip to the Highlands (56%), almost all of them had taken part in some non-sporting activities (99%).

The most common sporting activity was *low level walking* of between two and eight miles distance: almost half of the visitors to the area had participated in this activity during their trip (46%) making this far and away the most popular sporting/outdoor activity. Longer distance walks and hillwalking were undertaken by 10% of visitors to the area, whilst the only other sporting pursuits carried out by more than 5% of visitors were cycling/mountain biking (8%) and golf (8%).

As might be expected, *general sightseeing and touring* was the most commonly cited non-sporting activity undertaken by visitors to the Inverness, Loch Ness and Nairn area, carried out by over nine visitors in every ten (92%). Over two thirds (69%) went shopping during their visit to the Highlands, whilst visits to museums, galleries and heritage centres were made by more than half of the visitors (55%). Four other non-sporting activities were undertaken by 12% or more visitors: visits to wildlife attractions (21%), archaeological sites (21%), leisure centres and swimming pools (18%), and concerts/ceilidhs/theatre/cinema (12%).

In comparison with the Highlands as a whole, there is some evidence that visitors to the Inverness, Loch Ness and Nairn area were slightly less likely to take part in sporting activities/outdoor pursuits (56% compared with 59% across the region as a whole). A number of activities were rather more commonly pursued amongst visitors to the area however, including shopping (69% compared with 58% in the Highlands generally), visits to museums and galleries (55% and 42% respectively), and visits to leisure centres/swimming pools (18% compared to 14%), reflecting the availability of these elements of the product.

When asked to indicate which one activity, if any, could be described as their main activity during their trip, only 13% of visitors mentioned a sporting activity, with either low level walking (7%) or hillwalking (3%), the two most common pursuits. As many as 83% described a non-sporting activity however, with general sightseeing/touring far and away the main activity undertaken (77% of visitors). Again, the survey provides some evidence that visitors to the Inverness area were rather less likely to cite a sporting activity as their main activity (13%) than visitors to the Highlands generally (17%).

For the four key activities undertaken by Inverness, Loch Ness and Nairn visitors, a number of key characteristics emerged:

- *General sightseeing/touring*: particularly popular amongst the over 55s, ABC1s, during the peak summer months, amongst non-Scots visitors, and those on their first ever trip to the Highlands;
- *Shopping*: more popular amongst those aged 55+ years, C2DEs, those staying in the one location, Scots visitors, those staying for 8+ nights, and those on a return trip;
- *Visits to museums/art galleries/heritage centres*: more popular amongst ABC1s, those on a touring holiday, overseas visitors, those staying for 8+ nights, and those on their first visit;
- *Low level walking (2-8 miles)*: more popular amongst those under the age of 35, those on a touring holiday, those staying in self-catering accommodation, visitors from outwith Scotland, those staying for 8+ nights, and those on their first ever trip.

## Attractions visited and levels of satisfaction

### *Attractions visited*

Respondents were presented with a list of attractions in the area and asked to indicate which ones they had already visited and which they intended to visit during their visit to the Highlands (see Table B-10 below):

**Table B-10 - Attractions visited in Inverness, Loch Ness & Nairn (%)**

Base: 555 visitors to Inverness, Loch Ness and Nairn

	<b>Inverness, Loch Ness &amp; Nairn</b>
Culloden Visitor Centre (*)	41
Urquhart Castle, nr Drumnadrochit	32
Cawdor Castle, Nairn (*)	32
Official Loch Ness Monster Exhib, Drumnadrochit	27
Fort Augustus Abbey (*)	26
Original Loch Ness Monster Exhib, Drumnadrochit	19
Inverness Museum and art Gallery	15
Fort George, Ardersier	14
Acquadome, Inverness	6
Beaully Priory, Beaully	4
Highland Wineries, Kirkhill	3
Invernairn Mill Visitor Centre, Nairn	3
Balnain House, Inverness	2
Bught Floral Hall and Visitor Centre, Inverness	2
None of these	15
<b>Total:</b>	<b>100</b>

(\*) - Interview locations.

Note that Drumnadrochit village was another interview location

It should be borne in mind that several of the listed attractions were interview sites (marked with an asterisk) and hence the visitation levels may have been slightly inflated. Overall, 85% of visitors to the area had visited at least one of the attractions listed. There were variations by origin of visitors however: whilst 23% of Scots had not visited any of the listed attractions, this compared with only 11% of visitors from elsewhere in the UK and 10% of overseas visitors.

Most popular was Culloden Visitor Centre: two in five respondents had visited this attraction on their trip (41%). Urquhart Castle and Cawdor Castle were each visited by around one third of the visitors to the area (32%), whilst the Official Loch Ness Monster Exhibition and Fort Augustus Abbey were each visited by over a quarter of the visitors to the Inverness, Loch Ness and Nairn

area (27% and 26% respectively). These main attractions had a number of key characteristics in terms of the types of respondents **most likely to visit**:

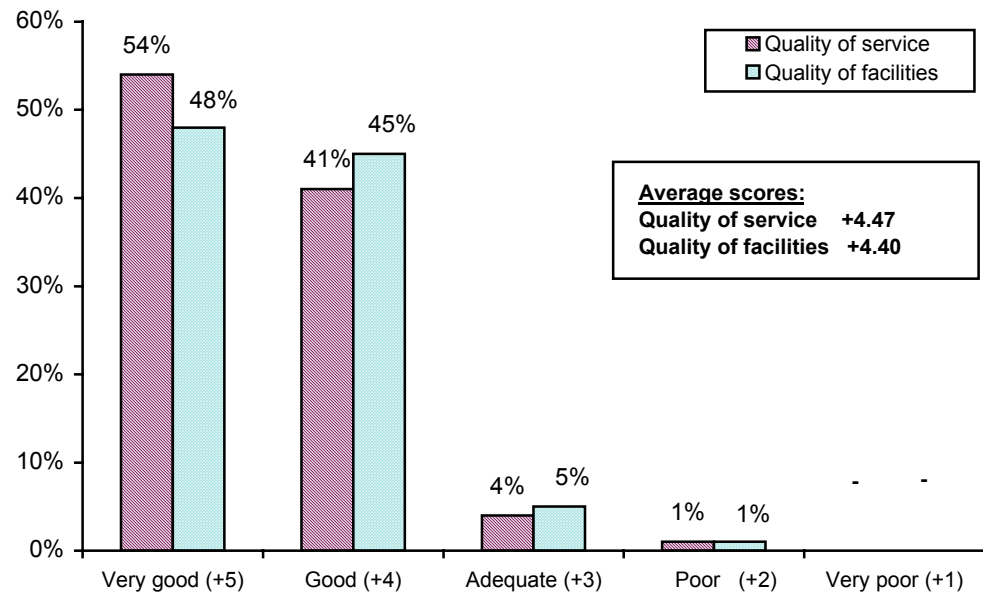
- *Culloden Visitor Centre (41% overall)*: those aged 55+ (45%), ABC1s (43%), overseas visitors (44%) and those staying in B&Bs (48%),
- *Urquhart Castle (32% overall)*: those aged under 35 (42%), ABC1s (35%), overseas visitors (42%) and first time visitors (40%);
- *Cawdor Castle (32% overall)*: ABC1s (37%), those staying in the one location (35%), visitors from other parts of the UK (36%) or overseas (36%), and those staying for four or more nights in the Highlands (37%);
- *Official Loch Ness Monster Exhibition (27% overall)*: those aged under 35 (35%), C2DEs (30%), those staying in hotels/guest houses (34%), visitors from overseas (31%) and those on their first ever visit to the Highlands (33%);
- *Fort Augustus Abbey (26% overall)*: visitors from elsewhere in the UK (31%), and those staying for eight or more nights in the Highlands (29%).

*Levels of satisfaction with attractions*

Those people interviewed in the Inverness, Loch Ness and Nairn area were asked to rate the quality of service and the quality of facilities experienced in visitor attractions throughout the Highlands:

**Figure B-11 - Rating of attractions by visitors to Inverness, Loch Ness and Nairn (%)**

Base: 555 visitors to Inverness, Loch Ness & Nairn



Note: (-) - nil respondents

Satisfaction levels with attractions visited in the Highlands were generally very high amongst visitors to the Inverness, Loch Ness and Nairn area. Over half (54%) described the quality of service as “very good”, whilst a further 41% described it as “good”. Only 4% described it as merely adequate, whilst 1% felt service had been “poor” in Highland attractions.

Satisfaction levels were also high regarding the quality of facilities experienced in attractions - similar proportions (48% and 45% respectively) described the facilities as “very good” or “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, the quality of service achieved a marginally higher score (+4.47) than the quality of facilities (+4.40), although the difference is not really significant.

In terms of the quality of service received, satisfaction levels were generally higher amongst those aged 35-54 years (+4.59), those on a repeat visit to the Highlands (+4.53) and visitors from other parts of the UK (+4.59). satisfaction was slightly lower amongst those aged under 35 years (+4.31) and amongst visitors from overseas (+4.33). Similar patterns were evident in terms of their satisfaction with the facilities on offer at Highland visitor attractions.

## Use of Tourist Information Centres and levels of satisfaction

### *Visits to Tourist Information Centres in the Highlands*

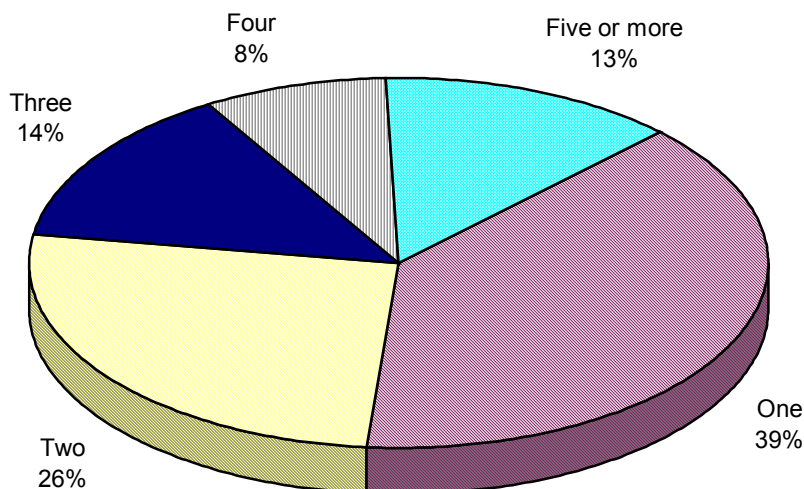
Around half of those interviewed in the Inverness, Loch Ness and Nairn area had already visited a Tourist Information Centre (TIC) during their visit to the Highlands (49%), a rather lower proportion than that for Scotland as a whole (56%). Those most likely to have visited a TIC included visitors aged under 35 years (58%), ABC1s (54%), those on a touring holiday (75%), visitors staying in bed and breakfast establishments (69%), overseas visitors (68%), those staying for eight nights or more (65%), and those making their first ever trip to the Highlands (61%).

Amongst the 51% of visitors who had not visited a TIC on their trip, around a quarter of them (27%) intended to visit one at some stage, whereas over two thirds (69%) had no intention of visiting a TIC. In total therefore, 63% of visitors had either already visited or intended to visit a TIC on their trip.

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

**Figure B-12 - Number of visits to Highland TICs**

Base: 270 respondents in Inverness, Loch Ness and Nairn who had visited a TIC



Around two visitors in every five (39%) had visited one Tourist Information Centre on their visit to the Highlands, however a quarter had visited two TICs (26%), and over a third had visited three or more (35%). On average, respondents had visited 2.4 TICs on their trip to the Highlands. Those aged

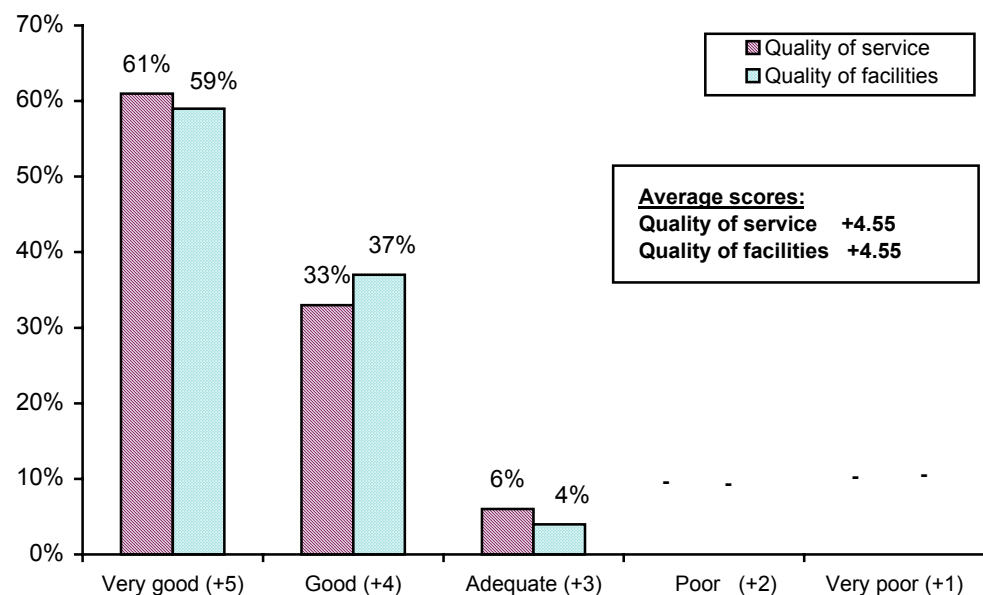
under 35 years (2.57 visits), overseas visitors (2.79 visits), and those on their first ever visit to the Highlands (2.65 visits), were most likely to use TICs.

#### *Levels of satisfaction with Tourist Information Centres*

Those people interviewed in the Inverness, Loch Ness and Nairn area 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-13 - Rating of TICs by visitors to Inverness, Loch Ness and Nairn (%)**

Base: 270 visitors to Inverness, Loch Ness & Nairn who had used TICs



Note: (-) - nil respondents

Amongst those respondents who had used TICs in the Highlands, levels of satisfaction with both the quality of service and the quality of facilities provided were very high: in each case, around three in five described them as “very good”, and more than a third (33% and 37%) described them as good. Encouragingly, no TIC visitors described either the service received or the facilities on offer as “poor”.

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 identical satisfaction scores of

+4.55. There were no statistically significant variations in these scores amongst any of the key market segments.

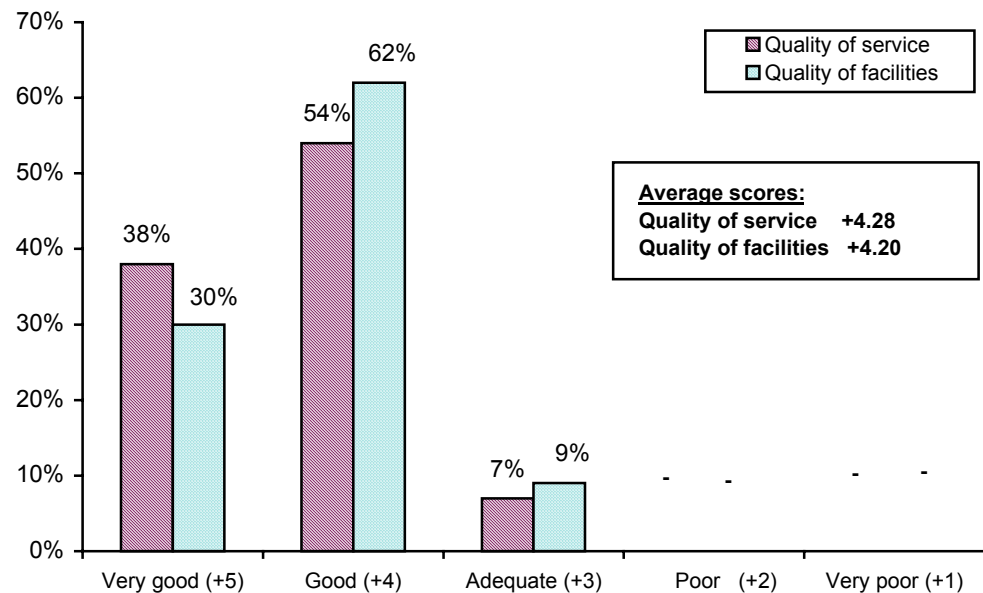
### Levels of satisfaction with shops, pubs and restaurants

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 Highlands:

#### *Ratings of Shops*

**Figure B-14 - Rating of shops by visitors to Inverness, Loch Ness and Nairn (%)**

Base: 555 visitors to Inverness, Loch Ness & Nairn



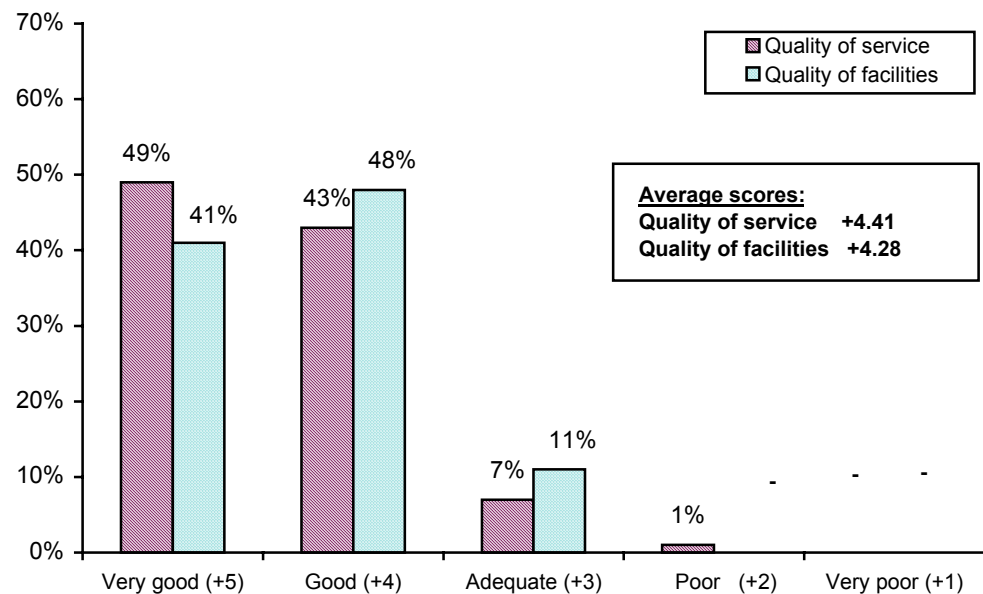
Note: (-) - nil respondents

Although no respondents described either the quality of service or facilities in Highland shops as “poor”, generally their satisfaction levels were slightly lower than for accommodation, visitor attractions and TICs in the Highlands. Despite that, overall levels of satisfaction were encouraging, with just under four in ten describing the service in shops as “very good” (38%), whilst over half (54%) described it as “good”. In terms of the quality of facilities, the balance was more towards “good” (62%) than “very good” (30%).

Scores of +4.28 (service) and +4.20 (facilities) were obtained on average amongst the 555 respondents interviewed. Those respondents rather less satisfied with the service and facilities included those under the age of 35 (+4.13 and 4.03 respectively), and overseas visitors (+4.14 and +4.15).

### *Pubs and Restaurants*

**Figure B-15 - Rating of pubs/restaurants by visitors to Inverness, L. Ness & Nairn (%)**  
Base: 555 visitors to Inverness, Loch Ness & Nairn



Note: (-) - nil respondents

As with other aspects of the Highland tourism product, visitors to the Inverness, Loch Ness and Nairn area were very satisfied with both the quality of service and facilities on offer in Highland pubs and restaurants. Around half of them described the service as “very good”, whilst a further 43% described it as “good”.

On average, the quality of service achieved an average score of +4.41 and the facilities achieved a score of +4.28. Once again, satisfaction levels would appear to be highest amongst older visitors and amongst those from overseas.

## Overall levels of Satisfaction

### *Attitudes and Opinions about the Inverness, Loch Ness and Nairn area*

Visitors to the Inverness, Loch Ness and Nairn area were provided with a series of “attitude statements” about various aspects of the area, and asked to indicate the extent to which they agreed or disagreed with each of them. A mix of both positive and negative statements were included to reduce the effect of positive bias which often occurs. When respondents are given a list of positive statements, they are often predisposed to respond positively:

**Table B-11 - Attitudes and Opinions in Inverness, Loch Ness and Nairn (%)**

Base: 555 visitors to Inverness, Loch Ness and Nairn

	Agree strongly (+2)	Agree (+1)	Neither (-)	Disagree (-1)	Disagree strongly (-2)	Mean score
<u>POSITIVE STATEMENTS</u>						
- There are plenty of visitor attractions & leisure facilities for visitors in the area	27	66	4	1	-	+1.23
- Information about things to see and do in the area is widely available	23	66	5	3	*	+1.12
<u>NEGATIVE STATEMENTS</u>						
- Signposting to places of interest in the area should be improved	5	14	10	60	5	-0.50
- There is not enough evening entertainment in the area	1	12	32	22	3	-0.18
- The quality of food in places to eat in the area needs to be improved	2	10	14	51	10	-0.67

\* - less than 0.5%

Generally, the reactions to each of the attitude statements were fairly positive in nature. By applying scores from +2 (agree strongly), to -2 (disagree strongly), it is possible to obtain a broad comparison of the relative strength of feeling about each statement.

### “Plenty of visitor attractions and leisure facilities for visitors to the area”:

The vast majority of visitors agreed with this statement (93%), with as many as 27% agreeing strongly. Only 1% of respondents (N=3) disagreed. With an overall average score of +1.23, the following types of visitor were in particular agreement with the statement: those aged 35-54 (+1.27), those on a caravan/camping holiday (+1.30), UK visitors (+1.27), those staying for eight nights or more (+1.30), and those who had been to the Highlands before (+1.27). Those less in agreement included the under 35s (+1.19), overseas visitors (+1.17), and first time visitors (+1.19).

“Signposting to places of interest in the area should be improved”

The majority of visitors disagreed with this statement (65%). However, with one in five visitors in some agreement (19%), this suggests that the issue of tourist signposting is worth addressing. With an average score of -0.50, the following groups would appear to be rather more likely to see signposting as a problem: the under 35s (-0.38), those on a touring holiday (-0.34), overseas visitors (-0.39) and those on their first ever trip to the Highlands (-0.39).

“Information about things to see and do in the area is widely available”

The vast majority of visitors agreed with this statement (89%), with almost a quarter (23%) agreeing strongly, and only 3% of respondents disagreed. With an overall average score of +1.12, the following types of visitor were in particular agreement with the statement: those on a caravan/camping holiday (+1.29), and visitors from other parts of the UK (+1.21).

“There is not enough evening entertainment in the area”

Almost a third of visitors (31%) were unable to comment on this statement, however with 13% agreeing, and only 25% disagreeing, there would appear to be a fair degree of agreement with this statement. The average score amounted to -0.18, and the following types of visitor were more likely to agree that there was little in the way of evening entertainment: those staying in self-catering accommodation (+0.08) and overseas visitors (-0.12). Generally, levels of satisfaction with the evening entertainment increased amongst those who stayed longer, and it was also higher amongst those who were staying in the one location and amongst Scots visitors.

“The quality of food in places to eat in the area needs to be improved”

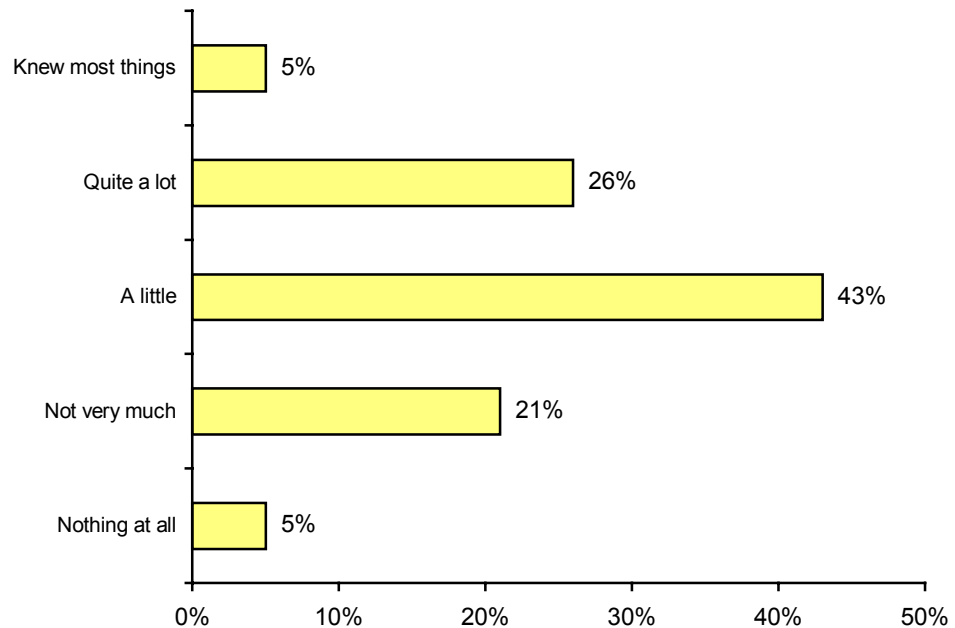
The majority of visitors disagreed with this statement (61%). However, with one in eight visitors in some agreement (12%), a fairly substantial proportion of the area's visitor market would appear to be dissatisfied (64 out of 555 respondents). With an average score of -0.67, those least likely to be satisfied included those aged under 35 years (-0.53), those on a touring holiday (-0.40), visitors from overseas (-0.45) and those staying for eight or more nights in the Highlands (-0.56). Repeat visitors from the UK, and those on a shorter stay were less likely to be disappointed with the quality of food.

*Prior knowledge of the Inverness, Loch Ness and Nairn area*

Visitors to the Inverness, Loch Ness and Nairn area were asked to indicate how much they had known about the area prior to their visit (see Figure B-16 below):

**Figure B-16 -Prior knowledge of the Inverness, Loch Ness and Nairn area**

Base: 555 visitors to Inverness, Loch Ness & Nairn



The largest proportion of visitors to the area claimed they had known a little about the Inverness, Loch Ness and Nairn area prior to their visit (43%). The balance between those knowing more than this and those knowing less was fairly even: On the one hand, some 5% said that they knew most things about the area, whilst just over a quarter (26%), claimed they knew a lot about the area. On the other hand, 5% knew nothing at all about the area prior to visiting, and 21% did not know very much.

Levels of prior knowledge about Inverness, Loch Ness and Nairn varied markedly between different market segments:

- *Age*: older visitors were more likely to know more about the area than younger visitors. 40% of those aged 55+ years knew either a lot or most things prior to visiting, compared to 21% of the under 35s;
- *Social Class*: C2DEs knew more about the area than ABC1s (38% and 29% respectively claimed they knew a lot or most things);
- *Type of Holiday*: one third (33%) of those staying in the one location knew a lot or most things about the area, compared to 21% of those who were touring;
- *Origin*: only 15% of overseas visitors knew a lot or most things prior to visiting the Inverness, Loch Ness and Nairn area compared to 46% of Scots and 29% of those from other parts of the UK.

*The visit to Inverness, Loch Ness and Nairn area: Expectations vs. Reality*

Another measure of visitor satisfaction was obtained by asking respondents how their trip to the Inverness, Loch Ness and Nairn area had compared with what they had expected (see Table B-12 below):

**Table B-12 - How the trip to Inverness, Loch Ness and Nairn compared with expectations (%)**

Base: 555 visitors to the Inverness, Loch Ness and Nairn area

	<b>Inverness, Loch Ness &amp; Nairn</b>
Better than expected (+1)	34
About the same as expected (-)	51
Worse than expected (-1)	1
Didn't know what to expect	14
<b>Total:</b>	<b>100</b>
Mean score	+0.38

Encouragingly, over a third of visitors to the area described their visit as having been better than expected (34%). Although over half felt it had been much as they had expected (51%), and 14% had not known what to expect, it is particularly encouraging that only 1% described their visit as having been worse than expected, thus indicating high degrees of satisfaction. There were no significant variations in these views amongst the main market segments.

The fact that as many as one third of visitors described their visit as better than expected indicates the role to be played by those organisations who actively promote the area to visitors. Whilst the survey has also indicated that the majority of visitors had not been exposed to STB and ATB literature prior to their visit (only 13% had been influenced by a tourist brochure), this lack of awareness of what the area can offer indicates that there is real opportunity to address this through their literature and other promotional activities.

Those visitors who described their trip to the Inverness, Loch Ness and Nairn area as having been better than expected, were asked for their reasons. A large number of reasons were provided, although only six were mentioned by 10% or more of visitors:

- The weather (31%)
- Scenery picturesque (31%)
- More to see and do than expected (23%)
- Friendly locals (17%)
- Quality of attractions/facilities (16%)
- General beauty of the area (13%)

*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 3% or more respondents are indicated below:

**Table B-13 - Improvements which would make trip to Highlands more enjoyable (%)**  
Base: 555 visitors to the Inverness, Loch Ness and Nairn area

	<b>Inverness, Loch Ness &amp; Nairn</b>
Provide more tourist information	8
More/better signposting	7
Toilet facilities - more needed	5
Improvements to roads	4
Too expensive	4
More buses to more locations/increased frequency	4
Increased opening times - attractions, TICs, toilets, shops etc.	3
Better quality/less expensive eating out	3
More parking needed, too expensive	3
Any references to improvements to attractions	3
Any references to improvements to accommodation	3
Nothing at all/very little	48
<b>Total:</b>	<b>100</b>

Around half of those interviewed in the Inverness, Loch Ness and Nairn area did not believe the local bodies responsible for tourism to the Highlands could have done anything to improve their trip (48%). 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 8% of visitors. More tourist information was mentioned by 8% of visitors, whilst improved signposting (7%) and improvements and increased toilet facilities (5%) were the next most popular suggestions. These three main suggestions were more frequently cited by the following segments:

- *More tourist information needed:* those aged under 35 (10%), those on a touring holiday (13%), overseas visitors (11%), those staying in the Highlands for eight or more nights (15%) and those on a first time visit (12%);
- *More/better signposting:* those on a touring holiday (12%) and overseas visitors (10%);

- More toilet facilities needed: no great variations amongst any market segments.

### Expenditure

Visitors were asked to indicate how much they had spent on their trip to the Highlands. Only 34 respondents were on a day trip, therefore the analysis of expenditure provided below refers to the 521 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-14 provides the average daily expenditure by respondents (including that spent on others) and daily expenditure per person, per day:

**Table B-14 - Amount spent per day**

Base: 521 visitors to the Inverness, Loch Ness and Nairn area staying overnight in the Highlands  
3,080 visitors to the Highlands staying overnight

	Spend per night (including on others)....		Spend per night per person....	
	in Inverness, Loch Ness & Nairn	in the Highlands	in Inverness, Loch Ness & Nairn	in the Highlands
Accommodation	£41	£38	£18	£18
Food and drink (outside accommodation)	£26	£23	£11	£10
Entertainment	£8	£5	£3	£2
Shopping	£13	£14	£6	£7
Transport	£11	£12	£5	£6
<b>Total:</b>	<b>£99</b>	<b>£92</b>	<b>£43</b>	<b>£43</b>

Typically, respondents in the Inverness, Loch Ness and Nairn area spent just under £100 per day during their trip to the Highlands on themselves and others in their party. This averaged out at an average spend of £43 per person per day. Accommodation spend accounted for the largest proportion of this expenditure (41%) followed by food and drink (26%).

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

- those aged 55+ years (£47), ABC1s (£47), those staying in hotels and guesthouses (£64) and in bed and breakfast establishments (£52), overseas visitors (£53), those staying for 3 nights or fewer (£50), and those visitors on their first trip to the Highlands (£46).

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

- those aged under 35 years (£39), C2DEs (£36), those who were on a caravanning or camping trip (£27), Scots visitors (£34), and those staying for eight nights or more (£35).

By applying the average length of stay figures to the daily expenditure estimates indicated in Table B-14, 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 which took place within the Inverness, Loch Ness and Nairn area. Figures are also provided for comparison of spend per trip to the Highlands as a whole:

**Table B-15 - Amount spent per trip**

Base: 521 visitors to the Inverness, Loch Ness and Nairn area staying overnight in the Highlands  
3,080 visitors to the Highlands staying overnight

	Spend per trip (including on others).....		Spend per person per trip.....	
	in Inverness, Loch Ness & Nairn	in the Highlands	in Inverness, Loch Ness & Nairn	in the Highlands
<i>Average length of Stay</i>	<i>3.4 nights</i>	<i>7.0 nights</i>	<i>3.4 nights</i>	<i>7.0 nights</i>
Accommodation	£139	£266	£61	£126
Food and drink (outside accommodation)	£88	£161	£37	£70
Entertainment	£27	£35	£10	£14
Shopping	£44	£98	£20	£49
Transport	£37	£84	£17	£42
<b>Total:</b>	<b>£337</b>	<b>£644</b>	<b>£146</b>	<b>£301</b>

Typically, respondents in the Inverness, Loch Ness and Nairn area spent between £300 and £350 during their trip to the area on themselves and others in their party. This averaged out at an average spend of just under £150 per person on their trip to the area. Given the average length of stay in the Highlands as a whole was 7 nights, the per trip expenditure was considerably higher (£301 per person).

Reflecting the variations in length of stay, those segments spending more (and less) per trip in Inverness, Loch Ness and Nairn 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 aged 55+ years (£181), those who were caravanning/camping (£169) or self-catering (£168), and C2DEs (£167).

The following markets on the other hand spent *less* on average per person, per trip in Inverness, Loch Ness and Nairn:

- those on a touring holiday (£93), those staying in bed and breakfast establishments (£109), those aged 15-34 years (£115) and those staying in hotels and guesthouses (£118).

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 Inverness, Loch Ness and Nairn area amongst the different market segments. This is summarised in Table B-16 below:

**Table B-16 - Spending per party in the Inverness, Loch Ness and Nairn area**

Base: 521 visitors to the Inverness, Loch Ness and Nairn area staying overnight in the Highlands

	Spend in Inverness, Loch Ness and Nairn area				
	Spend per person per day	Average length of stay	Spend per person per trip	Average party size	Spend per party per trip
<i>Age</i>					
15-34	£39	3.0 nights	£115	2.70	£310
35-54	£46	3.4 nights	£157	3.24	£509
55+	£47	3.9 nights	£181	2.72	£492
<i>Social Class</i>					
ABC1	£47	2.8 nights	£130	2.89	£376
C2DE	£36	4.6 nights	£167	2.99	£499
<i>Type of Holiday</i>					
Centred	£40	4.0 nights	£160	3.25	£520
Staying in 2 or 3 locations	£52	2.9 nights	£149	2.63	£392
Touring	£42	2.2 nights	£93	2.40	£223
<i>Accommodation Used</i>					
Hotels/Guesthouses	£64	1.8 nights	£118	2.64	£312
Bed and Breakfasts	£52	2.1 nights	£109	2.55	£278
Self-catering	£40	4.2 nights	£168	4.34	£729
Caravan/Camping	£28	6.0 nights	£169	3.11	£526
<i>Origin</i>					
Scotland	£34	4.7 nights	£158	3.00	£474
Other UK	£43	3.4 nights	£147	2.92	£429
Overseas	£53	2.5 nights	£131	2.87	£376
<b>Total:</b>	<b>£43</b>	<b>3.4 nights</b>	<b>£146</b>	<b>2.92</b>	<b>£426</b>

In terms of total trip spending per party in the Inverness, Loch Ness and Nairn area, the average spend was £426. The highest spenders were those staying in self-catering establishments (£729), followed by those staying in caravans/camping (£526) and those who were basing themselves in the one location (£520). On the other hand, lowest spenders were those on touring holidays (£223), those staying in bed and breakfast establishments (£278), visitors aged under 35 years (£310) and those staying in hotels and guesthouses (£312).

## C. Multivariate Analysis

In the production of cross-tabulations in visitor surveys of this type, it is often difficult to isolate the factor(s) which are of most significance in influencing the pattern of visits to a particular area. Consequently, some multi-variate analysis was conducted on the datasets of respondents interviewed in the Inverness, Loch Ness and Nairn area in an attempt to identify the key variables within the various market segments. This process was undertaken using the segmentation modelling program, **SPSS CHAID** (Chi-Squared Automatic Interaction Detector) which is described in some detail below.

### Multi-Variate Analysis – the Process

SPSS CHAID is a segmentation modelling program designed for analysing categorical data. It is useful in any situation in which your overall goal is to divide a population into segments that differ with respect to a designated criterion. In a CHAID analysis, a dependent variable is selected and an explanation for any variation in this variable is sought by analysing the data in terms of a number of predictor variables (e.g. age, social class, lifecycle characteristics etc.).

In the case of the Highlands Visitor Survey, a number of predictor variables were applied to each of the subregional areas to identify significant relationships between variables. Predictor variables included age, social class, origin, presence of children and whether or not visitors were on a first time or a repeat visit to the Highlands. Each of the predictor variables was cross-tabulated with the dependent variable - the interview location, to establish the most significant relationships.

This analysis identified the key market segments for the Inverness, Loch Ness and Nairn area, illustrating which of the lifestyle characteristics were most significant, and consequently which market segments would be likely to produce most *gains* to the area if they were targeted.

This analysis of the Highlands Visitor Survey data at the sub-regional level identified twelve market segments. Their composition, together with their share of the total tourism market to the Highlands is indicated below:

Market Segments	Share of the Highlands visitor market
• Highland residents	6%
• Other Scots residents, aged under 35 years, no children in household	5%
• Other Scots residents, aged 35-64 years, no children in household	10%
• Other Scots residents, aged under 65 years, children in household	7%
• Other Scots residents, aged 65+ years	4%
• Other UK residents, 1st ever visit to the Highlands, aged under 45 years	6%
• Other UK residents, 1st ever visit to the Highlands, aged 45-54 years	2%
• Other UK residents, 1st ever visit to the Highlands, aged 55+ years	3%
• Other UK residents, repeat visit to the Highlands	29%
• Overseas residents, children in the household	3%
• Overseas residents, no children in the household, 1st ever visit to the Highlands	17%
• Overseas residents, no children in the household, repeat visit to the Highlands	6%

For the purpose of clarity, a definition of these market segments is provided below:

*Highland residents:* those who live within the Highlands council area (inc. Moray)  
*Other Scots:* those who live outwith the Highland council area  
*Other UK:* those who reside in England, Wales and Northern Ireland  
*Overseas:* those who live outwith the United Kingdom (inc. Ireland)  
*Children:* classified as a dependent minor aged under 18 years  
*1st visit:* 1st ever visit to the Highlands of Scotland  
*Repeat visit:* those who have visited the Highlands at least once before

An analysis of the segmentation analysis of the respondents interviewed in the Inverness, Loch Ness and Nairn area follows overleaf.

## Visits to Inverness, Loch Ness & Nairn area – 17% Share overall

### *Dependent and Predictor Variables*

Dependent variable: those visiting Inverness, Loch Ness & Nairn;  
 Predictor variables: age; social class; origin; incidence of children present; 1<sup>st</sup> time/repeat visitors

### *Key Predictor Variable*

Origin of Visitors

### *Market Segmentation*

In the following table, the first column (incidence of visits to the area) shows the percentage of each market segment which was attracted to the Inverness, Loch Ness and Nairn area. For example, 20% of other UK residents on their first ever visit and aged 55+ years who were visiting the Highlands visited the Inverness, Loch Ness and Nairn area. The second column shows the propensity of that group to visit the Inverness, Loch Ness and Nairn area in comparison with the average for other parts of the Highlands. For example, the same group of other UK residents on their first ever trip to the Highlands and aged 55+ years are 19% more likely to visit the Inverness area than average. Visitors who are less likely than average to visit the area are shown as a negative percentage.

Market Segment	Incidence of visits to area	Above/below average incidence of visiting
- Other UK residents, on 1 <sup>st</sup> ever visit to Highlands, aged under 45	31%	+85%
- Overseas residents, children in the household	25%	+47%
- Overseas residents, no children in the household on 1 <sup>st</sup> ever visit to Highlands	24%	+40%
- Other UK residents, on 1 <sup>st</sup> ever visit to Highlands, aged 55+	20%	+19%
- Highland residents	19%	+11%
- Other Scots residents, aged under 35, no children in household	18%	+6%
- Other Scots residents, aged under 65, children in household	16%	-8%
- Other UK residents, on 1 <sup>st</sup> ever visit to Highlands, aged 45-54	15%	-11%
- Other UK residents, on repeat visit	13%	-23%
- Overseas residents, no children in household, on repeat visit	13%	-24%
- Other Scots residents, aged 35-64, no children in household	10%	-41%
- Other Scots, aged 65+	9%	-48%

The results show that the Inverness, Loch Ness and Nairn area was particularly popular amongst visitors from outwith Scotland – the four segments most

likely to visit this area were all from overseas or other UK origins. In addition, three of these four segments had never been to the Highlands before, suggesting this part of the Highlands is popular amongst those making their first trip to the Highlands. The only overseas segment with below average likelihood of visiting the area were those without any dependent children who were on a repeat visit to the Highlands.

## D. 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

## **E. Appendix 2: Questionnaires**

