

***HIGHLANDS VISITOR
SURVEY, 1997
MORAY, BADENOCH & STRATHSPEY
ENTERPRISE AREA
Final Report***

Prepared for :

*Highlands & Islands Enterprise
Highland Council
Highlands of Scotland Tourist Board
Moray, Badenoch and Strathspey Enterprise*

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Executive summary

- The majority of visitors to the Moray, Badenoch and Strathspey Enterprise area were staying away from home overnight (86%) - a slightly smaller proportion to that recorded in the Highlands as a whole (93%). Whereas only 7% of visitors interviewed throughout the Highlands were on a day trip from home, the equivalent proportion of visitors to the MBSE area was 14%;
- Almost three quarters of trips to Moray, Badenoch and Strathspey were centred holidays - staying in only one location (72%), a significantly higher proportion than the average for the Highlands as a whole (53%);
- The age profile of visitors to the MBSE area is slightly older than the profile of tourists visiting both Scotland and the Highlands as a whole: 25% of visitors to the area were under 35 years, compared with around 30% of tourists to Scotland and to the Highlands;
- Visitors to the area were very upmarket in profile: just under two thirds of visitors to the area were ABC1s (65%);
- The average party size amongst visitors to the whole of the MBSE area was 3.10 people, a higher proportion than in the Highlands as a whole (2.76 people) and partly a reflection of the larger proportion of visitors who had children with them (28%);
- Just under half of the visitors were from Scotland (45%), four in ten were from elsewhere in the UK (38%), and the remaining 16% were from overseas. this contrasts starkly with the Highlands as a whole whose visitor market consisted of 32% Scots, 40% from elsewhere in the UK and 27% from overseas;
- Two main reasons for visiting were each provided by around one respondent in every five to the Moray, Badenoch and Strathspey area: amongst 22%, the fact they had been before or knew the area was most important, whilst for 19%, aspects of the scenic attractions of the area were the main motivations for visiting;

- One key influence on the decision to visit the Highlands emerged: almost two thirds described a previous visit as their main influence (64%), reflecting the higher proportion of visitors on a repeat visit to the area than is the case for the wider Highland area;
- 11% of visitors had been influenced by tourist brochures;
- Typically, tourists visiting the MBSE area were staying in Scotland for 8.7 nights, spending 6.5 nights in the Highlands, and 3.9 nights locally;
- Less than a quarter of the visitors to the Moray, Badenoch and Strathspey Enterprise area were on their first ever visit to the Highlands (24%), a significantly lower proportion than the average for the Highlands as a whole (35%), illustrating the significantly higher proportions of repeat visitors attracted to the MBSE area. Just over a third of those interviewed in the MBSE area were on their first ever visit to the area (35%);
- Almost three quarters of visitors to the Moray, Badenoch and Strathspey Enterprise area used their own car on their journey to the Highlands (72%), rather more than the average across the Highlands as a whole (64%). Around three quarters of visitors to the MBSE area used their own car to travel around the Highlands (74%);
- Hotels were the most popular form of accommodation used by visitors to the Moray, Badenoch and Strathspey Enterprise area (29%). Self-catering accommodation in rented houses, flats and cottages (18%) and bed and breakfast establishments (17%), were the only other forms of accommodation stayed in by over 10% of visitors;
- Whilst just over half of those interviewed in the MBSE 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 (98%);
- In Badenoch and Strathspey, the most popular attraction was the Cairngorm Chairlift: two in five respondents had visited this attraction on their trip (41%). Three attractions were visited by just over a quarter of respondents however: Landmark Visitor Centre (29%), Speyside Heather Centre (28%) and Loch Morlich (26%);

- In Moray, a wide range of attractions were again listed, however in this case, only six of them had been visited by over 10% of respondents. Baxters of Speyside Visitor Centre was mentioned by over half of the respondents (54%). Glenfiddich Distillery and Brodie Castle were both visited by over a third of visitors to Moray, whilst Elgin cathedral was visited on one trip in every five to the district (21%);
- Satisfaction levels with attractions visited in the Highlands were very high: three in five (60%) described the quality of service as “very good”, whilst 57% described the facilities on offer in similar terms;
- Less than half of the visitors had either already visited or intended to visit a TIC on their trip (47%), significantly lower than the proportions recorded elsewhere in the Highlands. 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 Moray, Badenoch and Strathspey Enterprise area (43%). Over a quarter said they had known less than that (26%), whilst 31% claimed to have known more than that;
- Over half of those interviewed in the MBSE area did not believe the local bodies responsible for tourism to the Highlands could have done anything to improve their trip (55%). 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 7% of visitors across the area as a whole;
- As many as 85% of visitors to Moray were aware of the Malt Whisky Trail, indicating a very high level of previous knowledge. For four in five visitors to Moray, the Malt Whisky Trail had had no influence on their decision to visit at all (79%). Some 10% claimed it had had a minor influence on their decision to visit, whilst 11% claimed it had had a major influence.
- Just over a third of them had seen the Trail’s promotional leaflet before (34%), but only 6 of the respondents described it as having had a major influence on their decision to visit the area (2%);
- In total, some 56% of Badenoch and Strathspey visitors had visited Aviemore on their trip. Two thirds of them had not stayed overnight - they had been day visitors (66%). The most common length of stay in the village

amongst this group was between one and two hours (21%), although 17% had stayed for less than that, and 28% had stayed for longer on a day trip. Of the 34% of visitors who stayed overnight in Aviemore, there was a wide range in the lengths of stay recorded: just under one in five (19%) stayed for four nights or fewer, whilst 12% stayed in the village for at least a week;

- Three proposed developments were particularly popular amongst visitors to Aviemore: the creation of a traffic-free or traffic-calmed centre (33%), high quality buildings and landscaping using natural materials (33%), and improvements to the swimming pool and ice rink complex (32%);
- Typically, respondents in the MBSE area spent £92 per day during their trip to the Highlands on themselves and others in their party, a similar amount to the average in the Highlands as a whole. This averaged out at a mean spend of £41 per person per day;
- From some multivariate analysis of the data, it is clear that the Moray area was most popular amongst Scots aged over 65 years – they were 156% more likely to visit this area than the average. Highland residents and other Scots residents (without dependent children) also displayed above average likelihood to visit Moray, however visitors from other parts of the UK were slightly less likely to visit;
- The appeal of Badenoch and Strathspey to UK residents as opposed to overseas residents is clear. In particular, Scots with children in the household are most likely to visit the area (109% more likely than average). It was also popular amongst Highland residents (+53%), other UK residents aged 55+ on their first ever visit to the Highlands (+47%) and amongst Scots aged 65+ years (+35%). The area held least appeal amongst overseas residents with no dependent children in the household.

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 **Moray, Badenoch and Strathspey Enterprise (MBSE) area**. Similar reports have been produced to cover the other parts of the Highlands, namely: Caithness, Sutherland, Ross and Cromarty, Inverness, Loch Ness and Nairn, 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 893 interviews were undertaken in the MBSE area: 303 in Moray and 590 in Badenoch and Strathspey. The interview sites used are indicated below in Table A-1.

Table A-1 - Interview locations: Moray, Badenoch and Strathspey Enterprise area
Base: 893 interviews with visitors

	Interviews undertaken
Moray:	
Baxter's of Speyside Visitor Centre, Fochabers	130
Brodie Castle, Forres	79
Glenfiddich Distillery, Keith	78
Johnson's Cashmere Centre, Elgin	16
Badenoch & Strathspey:	
Aviemore - village	114
Grantown on Spey - town centre	110
Speyside Heather Centre	100
Landmark Visitor Centre, Carrbridge	80
Cairngorm - car park	79
Rothiemurchus Estate	51
Waltzing Waters	48
Ralia	8
Total:	893

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. Aviemore), intercepting visitors as they passed a specified point replaced the requirement to make contact as they leave an interview location. Only one interview shift was undertaken at Ralia as it was discovered that the vast majority of visitors who stopped there were just starting their holiday in the

Highlands, and hence were unable to answer a number of the key questions with any certainty.

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 **893 completed interviews** in the area represents a large and suitably robust sample for analysis of the characteristics of visits made to the Moray, Badenoch and Strathspey Enterprise area in 1997: at the 95% levels of confidence, results are accurate to plus or minus 3.3%. 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 MBSE areas is indicated below:

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

Base: 893 interviews with visitors to MBSE area

	Interviews undertaken		Interviews undertaken
Monday	11	March/April	4
Tuesday	11	May	9
Wednesday	13	June	11
Thursday	12	July	28
Friday	15	August	24
Saturday	19	September	12
Sunday	19	October	9
		November	4
Total	100	Total	100

Some 38% 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 (52%) 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 (26%) 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 Moray, Badenoch and Strathspey Enterprise 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 Moray and the Badenoch and Strathspey datasets was also undertaken in order to identify the key market segments for each area. The results of this exercise are described in Section C.

B. Main Findings

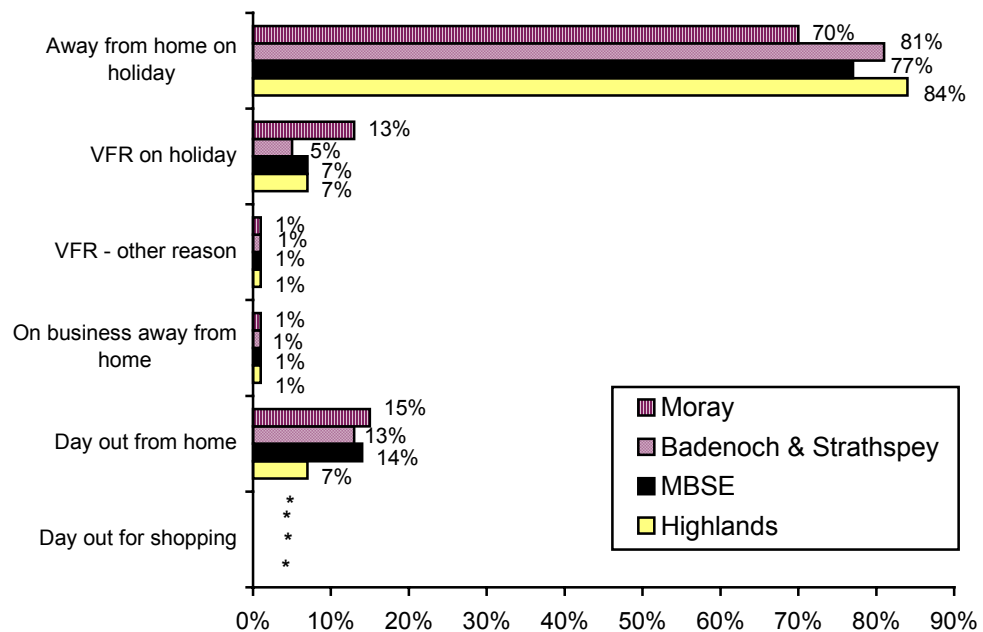
Reasons for Visiting

Purpose of Visit

The majority of visitors to the Moray, Badenoch and Strathspey Enterprise area were staying away from home overnight (86%) - a slightly smaller 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: Moray, Badenoch & Strathspey Enterprise

Base: 893 visitors to MBSE area;
3,301 visitors to the Highlands



* - less than 0.5%

The majority of visitors to the Moray, Badenoch and Strathspey Enterprise area were away from home on holiday (77%), however this is a significantly lower proportion to that in the Highlands as a whole (84%). Whereas only 7% of visitors interviewed throughout the Highlands were on a day trip from home, the equivalent proportion of visitors to the MBSE area was 14%. As is illustrated later in Table B-3, this is a reflection of relatively large proportions

of visitors to the area on a day out from the Inverness, Moray and Grampian areas. As in the Highlands generally, visiting friends and relatives was the main purpose amongst 7% of the visitors.

There were some variations in these proportions between different parts of the MBSE area: a higher proportion of visitors to Moray were visiting friends and relatives (15%) than in Badenoch and Strathspey (5%). Conversely, the proportion of holiday visitors in Badenoch and Strathspey was significantly higher (81%) than in Moray (70%).

There were some further minor variations in the purpose of trip profile to the MBSE area amongst the different market segments:

- those aged under 35 years were rather more likely to be visiting the area on holiday (83%), than those visitors older than this (75%). Visitors aged over 35 years were more likely to be visiting friends and relatives (9%) or on a day trip (15%);
- a higher proportion of C2DEs visiting the area were day trippers (19%) than amongst ABC1s (11%). Conversely, ABC1s were rather more likely to be on holiday (80%) than C2DEs (71%);
- visitors in the area at weekends were rather more likely to be day trippers (17%) than those visiting during the week (11%);
- as would be expected, over three quarters of Highland residents interviewed in the MBSE area were on a day out from home (77%). This compares with 18% of visitors from other parts of Scotland (18%).

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: 708 visitors to MBSE area staying away from home;
2,936 visitors to the Highlands staying away from home

	Overnight visitors to Moray	Overnight visitors to Bad/Strth	Overnight visitors to MBSE	Overnight visitors to Highlands
- Staying in one main location in the Highlands and taking day trips from there	62	77	72	53
- Touring around, staying in 2 or 3 locations during visit to the Highlands	21	17	18	29
- Touring around the Highlands, staying in more than 3 locations	17	7	10	17
- Other	*	*	*	*
Total:	224	484	708	100

Note: * - less than 0.5%

Almost three quarters of trips to Moray, Badenoch and Strathspey were not touring in nature (72%), a significantly higher proportion than the average for the Highlands as a whole (53%). Much of this is due to visits made to Badenoch and Strathspey, 77% of whom were on a one centre holiday to the area (compared with 62% of visitors to Moray). This undoubtedly reflects the attraction of Aviemore and the Spey Valley for one centre holidays. Fewer than three trips in every ten to MBSE (28%) could be described as touring in nature, significantly lower than the average for the Highlands as a whole (46%).

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

- *Age:* younger visitors were more likely to be on a touring holiday than older visitors. Some 39% of those aged under 35 years were staying in two or more locations, compared to 21% of those aged 55+ years;
- *Social Class:* C2DEs were more likely to be staying in just one location (78%) than ABC1s (69%);
- *Accommodation:* those visitors to MBSE staying in self-catering accommodation (88%) or in hotels and guesthouses (73%) were much more likely to be staying in only one location whereas those staying in Bed and

breakfast establishments were much more likely to be on touring holidays (66%);

- *Time of year:* those who were visiting in the shoulder months (March, April, October and November) were much more likely to be staying in only one location (94%) than those interviewed during the May to September period (58%);
- *Origin:* amongst those interviewed in the MBSE area, almost nine in ten Scots visitors (87%), and over three quarters of other UK visitors (78%) were staying in only one location in the Highlands compared with just over a quarter of overseas visitors (29%). Overseas visitors were therefore, considerably more likely to be touring - 40% stayed in two or three locations, and 31% stayed in even more than this;
- *Previous visits:* those on their first ever trip to the Highlands were more likely to be touring (46%), than those who had visited before (22%);
- *Length of Stay:* those staying in the Highlands for three nights or less were rather more likely to be staying in only one location (82%), than those who were in the Highlands for more than a week (60%). This latter group were more likely to be on a touring holiday than those staying for 1-3 nights - 40% and 17% respectively.

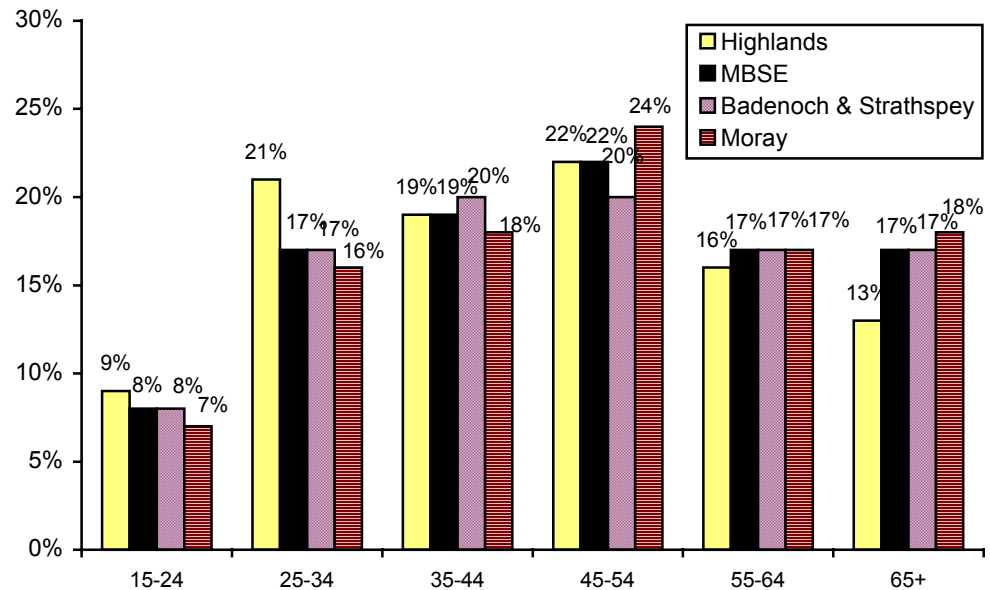
Visitor Profile

Age

The age groups of visitors to the Moray, Badenoch and Strathspey Enterprise area are indicated in Figure B-2 below:

Figure B-2 - Age of Visitors to the Moray, Badenoch & Strathspey Enterprise area

Base: 893 visitors to MBSE area;
3,301 visitors to the Highlands



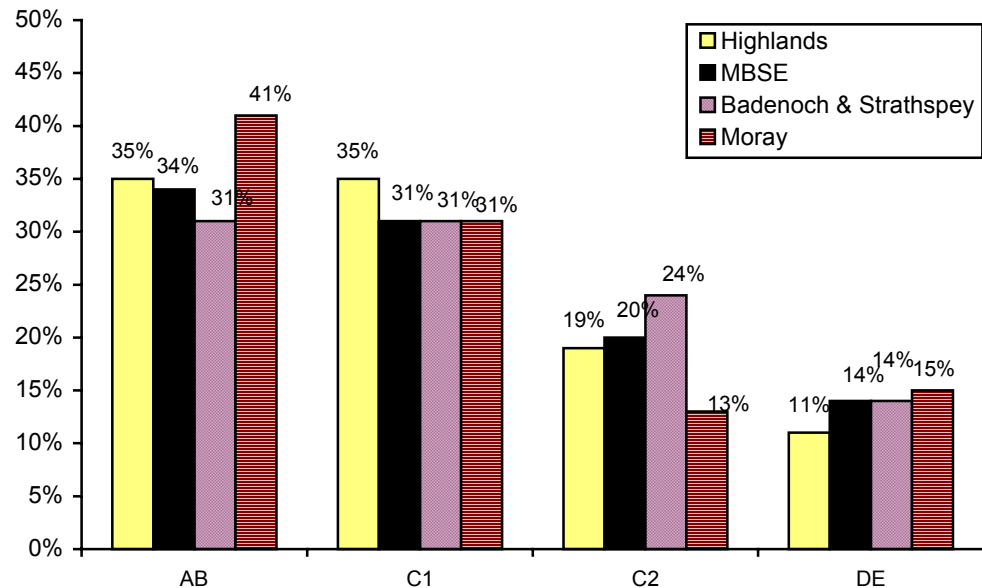
The age profile of visitors to the MBSE area is slightly older than the profile of tourists visiting Scotland as a whole: 25% of visitors to the area were under 35 years, compared with around 30% of tourists to Scotland (UKTS and IPS estimates). This is also an older profile than that for visitors to the Highlands as a whole, 30% of whom were aged under 35 years. Conversely, whilst three in ten visitors to the Highlands as a whole were aged 55+ years (29%), over a third of visitors to the MBSE area were in this age grouping (34%). The age profiles of visitors to the Moray area and Badenoch and Strathspey area were very similar however, with no significant differences from the overall profile for the wider MBSE area.

As would be expected, the age profile of visitors to the Moray, Badenoch and Strathspey Enterprise area varied by different categories of visitor:

- *Social Class:* C2DEs visiting the MBSE area were rather more likely to be older visitors: 40% were aged 55 and over compared with 31% of ABC1s;
- *Type of trip:* a larger proportion of those on a touring trip to the Highlands were under 35 years (36%) than those staying in the one location (22%);
- *Accommodation:* visitors staying in bed and breakfast establishments tended to be younger than those staying in hotels (47% and 19% respectively, were aged under 35);
- *Time of Year:* visitors to the area in the main summer season from May to September were more likely to be aged under 35 years (26%), compared with only 20% of those who visited outwith this period. Off peak trips to the area were therefore more likely to be made by older visitors: 44% were aged 55+ years, compared to 32% of those who visited between May and September;
- *Origin:* overseas visitors tended to be significantly younger than their UK counterparts: almost half of those from overseas were aged under 35 years (46%) compared with around 20% of visitors from Scotland or other parts of the UK;
- *Length of Stay:* younger visitors were more likely to be on a short stay: 34% of those staying for 1-3 nights were aged under 35, compared with 23% of those who stayed for eight nights or longer;
- *Previous visits:* those on a repeat visit to the Highlands were more likely to be older than those visiting for the first time (38% and 24% respectively were aged over 55 years).

*Social Class***Figure B-3 - Social Class of visitors to Moray, Badenoch & Strathspey Enterprise area**

Base: 893 visitors to MBSE area;
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 Moray, Badenoch and Strathspey Enterprise area are very upmarket in their profile: just under two thirds of visitors to the area were ABC1s (65%). Visitors to Moray were rather more likely to be ABC1s than those visiting Badenoch and Strathspey however (72% and 62% respectively).

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 MBSE 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 MBSE area included:

- those aged 35-54 (70%), those on a touring holiday (73%), those staying in bed and breakfasts (76%), those visiting in May and June (71%), those on a 1-3 night trip (70%), and visitors from overseas (80%).

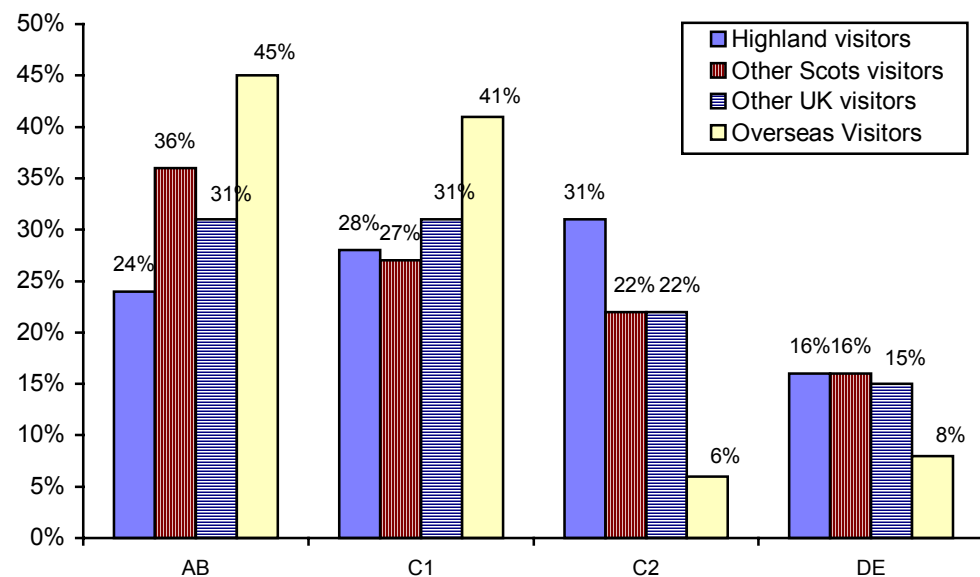
The following segments were **more likely to be C2DEs**:

- those aged 55+ years (41%), visitors from the Highlands (47%), and those on a day trip (48%).

The variation in the social class profile of visitors to the Moray, Badenoch and Strathspey Enterprise area was very marked, with overseas visitors to the area considerably more likely to be ABC1s than Highland residents visiting the area or visitors from other parts of Scotland or the UK (see Figure B-4 below):

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

Base: 893 visitors to MBSE area;



Party size and composition

Only 4% of visitors to the MBSE area were visiting alone, and this varied from 1% in Moray to 6% in Badenoch and Strathspey. Across the area, half of the visitors were with one other person (50%), whilst as many as a third (33%) had four or more people in their party. The average party size amongst visitors to the whole of the MBSE area was **3.10 people**, a higher proportion than in the Highlands as a whole (2.76 people). It was particularly high in Badenoch and Strathspey (3.15 people), although the average of 3.01 for Moray was still higher than the average across the Highlands.

Largest party sizes were amongst visitors who were staying in self-catering accommodation (4.17 people), whilst those aged 35-44 years also had larger than average party sizes (3.37 people). This is undoubtedly a reflection of there being more family groups within this age category. Those on a touring holiday were in smaller parties (2.66 people) than visitors staying in the one location (3.25 people). Those who were staying in hotels or in bed and breakfast establishments were more likely to be in smaller parties (2.62 and 2.57 people respectively). The composition of these groups is illustrated below:

Table B-2 - Party Composition in the Moray, Badenoch and Strathspey Enterprise area (%)

Base: 893 visitors to MBSE area;
3,301 visitors to the Highlands

	Moray	Badenoch & Strathspey	MBSE	Highlands
Adults, no children under 18 years	78	69	72	79
- one adult, no children under 18 years	1	6	4	7
- two adults, no children under 18 years	55	46	49	56
- more than two adults, no children under 18 years	21	17	18	16
Adults with children under 18 years	22	31	28	21
Total:	100	100	100	100

The larger average party size in the Moray, Badenoch and Strathspey Enterprise area compared to the Highlands as a whole, would appear to be a reflection of the significantly larger proportion of visitors who had children with them (28%, compared with 21% in the Highlands as a whole). This is mainly a reflection of visitors to Badenoch and Strathspey: whilst a similar proportion of visitors to Moray had children to the average for the Highlands as a whole (22% and 21% respectively), over three in ten visitors to Badenoch and Strathspey had children present (31%). Despite that, the most common party composition in the MBSE area as a whole consisted of two adults and no children (49%).

As would be expected, a larger proportion of those aged 35-54 years had children with them (42%) than amongst those aged under 35 (28%) and those aged 55+ years (10%). Others more likely to have children with them included those on a centred holiday (32%), and visitors who were self-catering (47%) or camping and caravanning (37%). Also, whereas visitors to the area from Scotland were more likely to have children present (35%), visitors from elsewhere in the UK (23%) or from overseas (19%) were considerably less likely. Those on repeat visits were also rather more likely to have children present (30%) than first time visitors (21%).

Origin of Visitors

The origin of visitors to the Moray, Badenoch and Strathspey Enterprise area is indicated in Table B-3 below:

Table B-3 - Origin of Visitors to Moray, Badenoch & Strathspey Enterprise area (%)

Base: 893 visitors to MBSE area;
3,301 visitors to the Highlands

	Moray	Badenoch & Strathspey	MBSE	Highlands
	All visitors	All visitors	All visitors	All visitors
Scotland	39	49	45	32
- Aberdeen/Grampian	11	10	10	6
- Glasgow/Clyde Valley	5	9	7	7
- Edinburgh/Lothian	6	7	7	5
- Tayside	3	5	4	2
- Fife	2	4	3	2
- Moray	4	2	3	1
- Inverness area	3	2	2	2
- Other Scotland	5	10	9	7
England	32	41	38	39
- South East	12	12	12	13
- North	6	10	8	9
- North West	4	9	7	6
- Midlands	8	7	7	7
- South West	3	3	3	3
Other UK	1	1	1	2
Overseas	28	9	16	27
- USA	6	2	3	5
- Germany	7	1	3	5
- France	3	1	1	2
- Australia	1	1	1	3
- Netherlands	*	1	1	2
- Italy	2	*	1	1
- Belgium	1	*	1	1
- Other overseas	8	3	5	8
Total:	100	100	100	100

Note: * - less than 0.5%

With just under half of all visitors to the MBSE area from Scotland (45%), the greater importance of the home markets to this part of the Highlands is evident relative to the Highlands as a whole where under a third of visitors were Scots (32%). Just under four in ten were from elsewhere in the United Kingdom (38%), a similar proportion to the Highlands generally, whereas only

16% were from overseas, considerably less than in the Highlands as a whole where over a quarter of visitors were from overseas (27%).

The Badenoch and Strathspey area was particularly dependent on the Scots and other UK markets which together accounted for over nine visitors in every ten to the area (91%). Moray on the other hand was more similar to the other parts of the Highlands, with 28% of the visitors from overseas and 72% from the UK.

The main population centre of the South East of England was the biggest regional market for the MBSE area as a whole, and indeed for both of the regions within the area: 12% of all visitors came from there. Combined, the North and North West of England were also particularly important, accounting for 15% of visitors. Amongst Scots, Aberdeen and Grampian was the most important generator of visitors to all parts of the MBSE area, although the main population centres of Glasgow (7%) and Edinburgh (7%) were also important markets. In terms of overseas markets, the United States of America and Germany were the two key markets for this area, with 3% of visitors coming from each of these countries.

By concentrating primarily on overnight holiday visitors to the area, it is possible to compare the profile of visitors to the Moray, Badenoch and Strathspey Enterprise area with the typical origin profile for Scotland as a whole (from UKTS and IPS). Typically, English residents account for around 40% of holidays in Scotland, a similar proportion are Scots, 3% are from Wales and Northern Ireland, and the remaining 15% are from overseas. The equivalent proportions of holiday visitors to Moray, Badenoch and Strathspey were as follows:

- Scots holiday visitors: 37%
- English holiday visitors: 44%
- Other UK holiday visitors: 1%
- Overseas holiday visitors: 18%

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 MBSE area attracted a fairly similar profile of visitors in terms of origin to Scotland as a whole, and was rather less dependent on the overseas market than the rest of the Highlands.

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 MBSE area respondents are outlined in Table B-4 below:

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

Base: 893 visitors to MBSE area;
3,301 visitors to the Highlands

	Moray	Badenoch & Strathspey	MBSE	Highlands
Been before/knew area	16	25	22	18
Scenery/scenic views/beauty/unspoilt	15	21	19	22
Like area/enjoy it	11	17	15	12
Any mentions of specific attractions	19	11	14	8
General sightseeing/day out	18	10	13	13
Family/friends/connections in the area	16	10	12	12
Mountains and hills/landscape	9	11	10	12
Never been before/always wanted to come	9	11	10	14
Peace and quiet/tranquillity/relaxing/remote	4	13	10	13
Wildlife/nature/flora and fauna	6	7	6	6
Personal business/house here/timeshare	6	6	6	6
Because of the people/friendly people	5	5	5	4
Walks/walking opportunities	1	7	5	6
Total:	100	100	100	100

Two main reasons for visiting were each provided by around one respondent in every five to the Moray, Badenoch and Strathspey area: amongst 22%, the fact they had been before or knew the area was most important, whilst for 19%, aspects of the scenic attractions of the area were the main motivations for visiting. Whilst a further 15% also described their prime motivation for visiting as that they liked the area, another large proportion were visiting because they had never been before and had always wanted to come.

Whilst there are some similarities in the reasons for their visit provided by visitors to the MBSE area to those for the Highlands as a whole, a number of reasons given are more important attractions of the MBSE area: in particular, 14% had been attracted by specific attractions - significantly more than the average of 8% at the Highland level. Other motivations were rather less important amongst visitors to Moray, Badenoch and Strathspey however: never having been before (10% compared to 14% across the Highlands as a

whole), peace and quiet (10% compared with 13%), and the scenery (19% compared to 22%). In particular therefore, visitors to the MBSE area were rather more likely to have been attracted as a result of a previous visit and less likely to be visiting because they had never been before.

There were also some marked variations in the motivations across the different areas of the region. Amongst visitors to Moray, visits to specific attractions (19%), general sightseeing (18%) and the presence of family and friends in the area were rather more important motivations, whereas in Badenoch and Strathspey, the main motivations were previous visits to the area (25%) and the scenery (21%).

Also, there were variations in the motivations for visiting amongst the key market sectors visiting the MBSE area:

- *Been before, knew area (22% overall):* more important amongst those aged 55+ years (27%), those staying in the one location (26%), visitors staying in hotels and guesthouses (28%) or in self-catering accommodation (32%), amongst UK visitors (26%), and amongst those staying in the Highlands for four nights or longer (27%);
- *Scenery/scenic views/beauty/unspoilt (19% overall):* more important amongst those on a touring trip (30%), amongst those staying in touring caravans or camping (33%), amongst visitors from overseas countries (24%) or from England (24%) and amongst those on their first ever visit to the Highlands (25%);

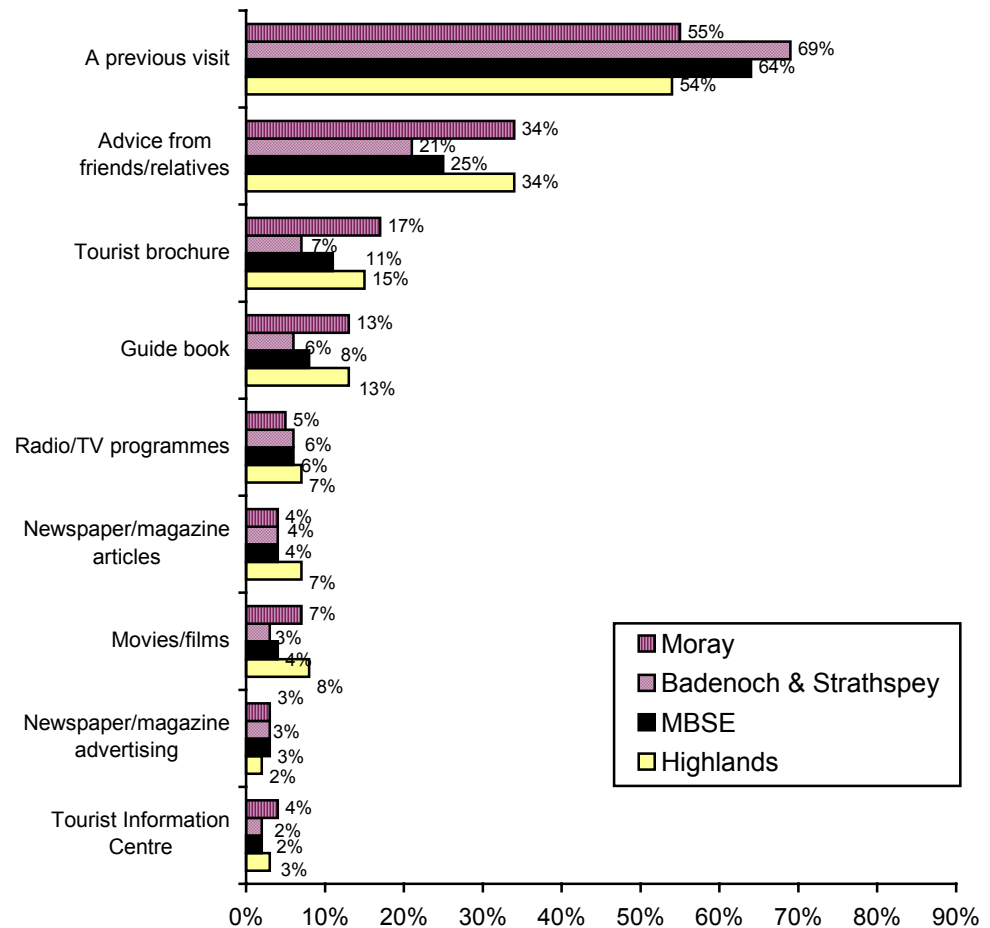
- *Like area, enjoy it (15% overall):* more important amongst those aged 55+ years (18%), those staying in the one location (18%), those staying in caravans or camping (25%), amongst UK visitors (18%), those staying for eight or more nights (19%) or on their first ever visit to the Highlands (19%);
- *Any mentions of specific attractions (14% 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 C2DEs (17%), those on a touring holiday (19%), amongst visitors from within the Highlands (23%) and it was the main reason provided by day trippers.

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: 893 visitors to MBSE area;
3,301 visitors to the Highlands



In the Highlands as a whole, two key influences emerged amongst visitors: a previous visit(s) to the area (54%), and advice from friends or relatives (34%). In the Moray, Badenoch and Strathspey area, the first of these reasons was paramount: almost two thirds described a previous visit as their main influence (64%), reflecting the higher proportion of visitors on a repeat visit to the area than is the case for the wider Highland area. This is explored further in Figures B-6 and B-7.

Clearly however, with previous visits and advice from friends and relatives the only influences on the decision to visit mentioned by more than 11% of visitors, “informal” information sources were more important influencing factors than “formal” sources. 11% and 8% respectively mentioned tourist brochures and guidebooks, whilst visits to Tourist Information Centres would only appear to have influenced 2% of those interviewed in the MBSE area.

There were some differences in the influences on visitors to Moray and Badenoch and Strathspey: visitors to Moray were rather more likely to have been influenced by advice from friends and relatives than visitors to Badenoch and Strathspey (34% and 21% respectively), or by tourist brochures (17% and 7%) or guidebooks (13% and 6%). Conversely, previous visits were even more important to Badenoch and Strathspey (69%) than the area average (64%) or the average for the Highlands as a whole (54%).

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	- 76%
Advice - friends/relatives	- 20%
Tourist Brochure(s)	- 7%
Guide book	- 3%
Radio/TV programme	- 3%

Other UK visitors:

Previous visit	- 67%
Advice - friends/relatives	- 25%
Tourist Brochure(s)	- 9%
Radio/TV programme	- 7%
Guide book	- 5%

Overseas visitors:

Advice - friends/relatives	- 45%
Guide book	- 34%
Previous visit	- 27%
Tourist Brochure(s)	- 26%
Movies/films	- 21%

Clearly, amongst Scots visiting the Moray, Badenoch and Strathspey Enterprise area, previous visits to the Highlands were the major influence on their decision to visit this time - all other influences were relatively minor, although 20% 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 the important role played by the guidebook is clear: over a third of them decided to visit having read guidebooks (34%).

Use of tourist brochures

In total around 11% of those interviewed in the MBSE area had been influenced to visit by tourist brochures, although this influence varied from 17% of visitors to the Moray area to only 7% of visitors to Badenoch and Strathspey. Tourist brochures were also more influential in some markets than others: 29% of those on a touring holiday had been influenced by brochures, as had 26% of overseas visitors, and 23% of those on their first ever visit to the Highlands. Conversely, they had only influenced 6% of Scots visitors and 2% of those on a day out

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 the MBSE area, influenced by brochure(s)
507 respondents in the Highlands, influenced by brochure(s)

	Moray	Badenoch & Strathspey	MBSE	Highlands
Freedom of the Highlands (HOST)	23	33	28	32
Scotland - Main UK Guide (STB)	15	29	21	31
Scotland - Overseas Guide (STB)	35	33	34	31
6 Local Accommodation/ Visitor Guides (HOST)	8	5	6	14
None of these	42	40	41	39
Total:	100	100	100	100

Similar proportions of visitors to the Moray, Badenoch and Strathspey Enterprise area to those interviewed throughout the Highlands who had been

influenced by tourist brochures would appear to have been talking about one of the main HOST or STB brochures: just over two in five (41%) said they had not been influenced by any of these brochures, a similar proportion to those interviewed throughout the Highlands (39%).

Levels of recognition were highest for the Scottish Tourist Board's overseas brochure (34%), however low levels of recognition were received for the local visitor guides produced by the Highlands of Scotland Tourist Board (6%). As many as 61% of the overseas visitors influenced by brochures recognised the STB's main overseas guide.

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 MBSE area:

Table B-6 - Length of Stay (%)

Base: 772 respondents in the MBSE area staying away from home
3,080 respondents in the Highlands staying away from home

	Moray, Badenoch & Strathspey area			Highlands		
	In Scotland	In the Highlands	In the area	In Scotland	In the Highlands	In the area
None	-	8	30	-	5	22
One	2	4	9	2	4	14
Two	8	10	10	5	9	16
Three	7	9	9	7	10	11
Four	7	7	6	7	9	7
Five	6	8	4	5	8	5
Six	8	6	4	7	8	4
Seven	20	21	15	19	19	11
Eight - Thirteen	19	13	5	20	15	4
Fourteen	14	9	5	15	8	4
Fifteen or more	9	4	1	14	5	2
Total:	100	100	100	100	100	100
Average	8.7 nights	6.5 nights	3.9 nights	10.0 nights	7.0 nights	3.9 nights

Typically, tourists in the Moray, Badenoch and Strathspey Enterprise area were staying in Scotland for 8.7 nights, in the Highlands for 6.5 nights, and in the MBSE area for 3.9 nights. These lengths of stay in Scotland and in the Highlands are slightly shorter than the average for tourists in the Highlands as a whole (10.0 and 7.0 nights respectively), although the stay in the local area is similar to the average (3.9 nights). Seven in ten of those tourists interviewed in the MBSE area were staying overnight in the area (70%). This is a smaller proportion than the average across the other areas of the Highlands where 78% of tourists were staying overnight locally.

There were some significant variations in the lengths of stay recorded by visitors interviewed in the Moray area and the Badenoch and Strathspey area:

	In Scotland	In the Highlands	In the area
Moray	9.7 nights	6.1 nights	2.4 nights
Badenoch & Strathspey	8.2 nights	6.7 nights	4.5 nights
MBSE area	8.7 nights	6.5 nights	3.9 nights
Highlands	10.0 nights	7.0 nights	3.9 nights

Although visitors to Moray tended to spend longer in Scotland than visitors to Badenoch and Strathspey (9.7 nights and 8.2 nights), their length of stay in the Highlands in general, and the local area in particular were notably shorter than in Badenoch and Strathspey: 6.1 nights compared to 6.7 nights respectively in the Highlands and 2.4 nights compared with 4.5 nights locally. This highlights the larger proportions of visitors to Badenoch and Strathspey who were staying only in that location, as opposed to the higher proportion of tourers in Moray (see Table B-1).

There were some key variations in length of stay in the MBSE area generally amongst the main segments of the market:

- Older visitors stayed for a longer period than younger visitors: the average duration of stay amongst the over 55s in the MBSE area was 4.2 nights. The comparable length of stay for those under 35 years was 3.3 nights;
- C2DEs stayed slightly longer in the local area (4.0 nights) than ABC1s (3.8 nights);
- Those respondents touring around stayed for a shorter period locally than those on a centred holiday (1.7 nights and 4.5 nights respectively);
- Visitors who were staying in self-catering accommodation stayed considerably longer in the MBSE area (6.1 nights) than those in other forms of accommodation, particularly bed and breakfasts which were popular with tourers (1.5 nights);
- Length of stay in the MBSE area varied significantly by origin: overseas visitors stayed for the shortest time (2.5 nights), compared with a longer length of stay amongst visitors from Scotland (3.9 nights) and other parts of the UK (4.4 nights).

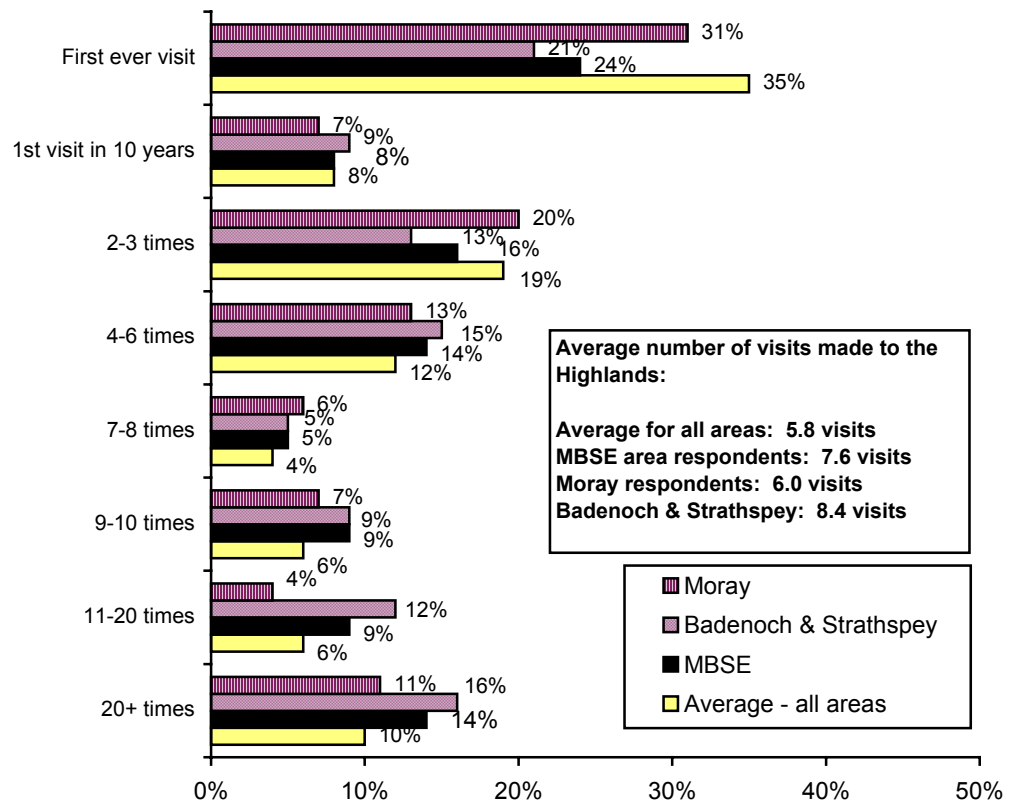
Previous Visits

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: 819 non-Highland residents in the MBSE area
3,120 non-Highland residents in the Highlands



Less than a quarter of the visitors to the Moray, Badenoch and Strathspey Enterprise area were on their first ever visit to the Highlands (24%), a significantly lower proportion than the average for the Highlands as a whole (35%), illustrating the significantly higher proportions of repeat visitors attracted to the MBSE area. As many as 23% of visitors had been to the Highlands more than ten times previously.

Visitors to Badenoch and Strathspey were particularly likely to have been to the Highlands before: 79% had been before, compared with 69% of visitors to Moray. They were also more likely to have visited on more occasions: on average, Badenoch and Strathspey respondents had visited the Highlands 8.4

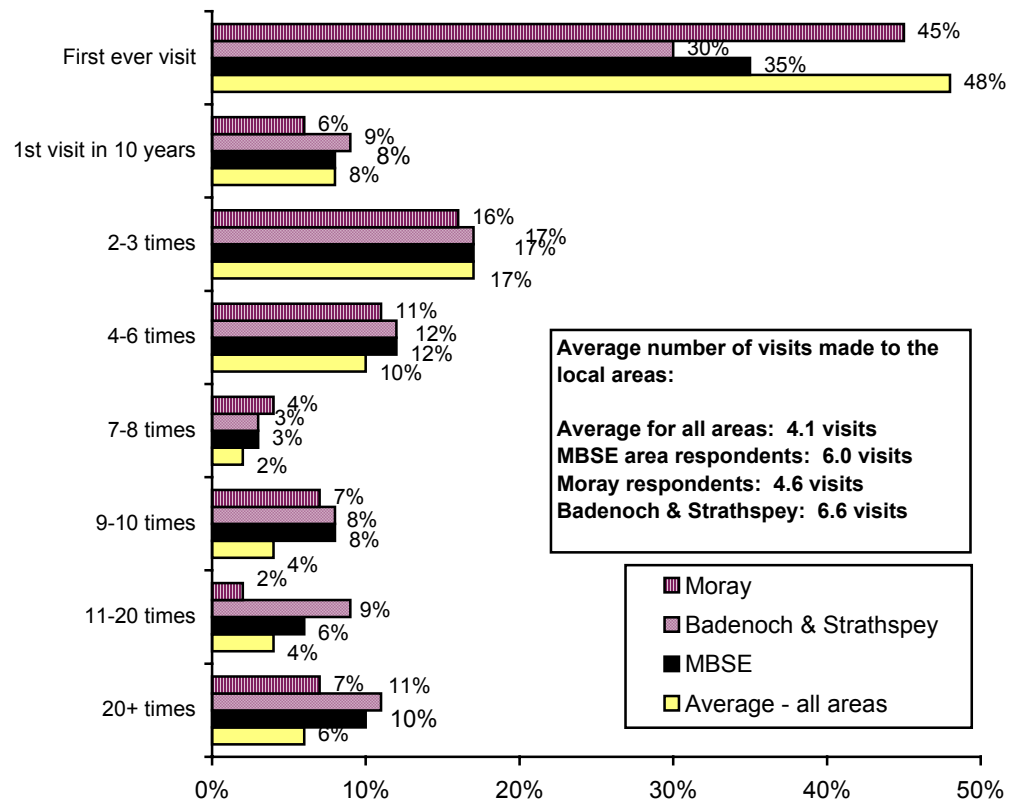
times before, compared with 6 times amongst Moray respondents. The average for the whole MBSE area was 7.6 visits, indicating a greater level of previous experience of the Highlands than the average across the Highlands as a whole (5.8 visits).

As would be expected, those aged 55+ years were more likely to have been to the Highlands before than those aged under 35 years (84% and 60% respectively were on repeat trips). Those on a centred break were also more likely to have been before (80%) than those on a touring holiday (50%).

Again, as would be expected, the incidence of previous trips to the Highlands decreased with distance: 72% of overseas visitors interviewed in the Moray, Badenoch and Strathspey Enterprise area were on their first ever trip to the Highlands compared to 25% of visitors from England, Wales and Northern Ireland and only 4% of Scots.

*Previous visits to Moray, Badenoch and Strathspey Enterprise area***Figure B-7 - Number of visits to Moray, Badenoch & Strathspey Enterprise area (including this one)**

Base: 819 non-Highland residents in the MBSE area
3,120 non-Highland residents in the Highlands



Just over a third of those interviewed in the MBSE area were on their first ever visit to the area (35%). Again, this is a significantly lower proportion of first-time visitors than the average across the Highlands as a whole (48%). Once again, this is mainly a result of visitors to Badenoch and Strathspey, some 70% of whom were on a return trip to the area. With just over half of Moray visitors having been before (55%), this is not too dissimilar to the average across the Highlands (52%).

Again, those aged 55+ years are more likely to have been to the MBSE area before than those aged under 35 years (70% and 51% respectively were on repeat trips). Also, those on a centred break were more likely to have been to the area before (70%) than those on a touring holiday (37%).

83% of overseas visitors interviewed in the Moray, Badenoch and Strathspey Enterprise area were on their first ever trip to the area compared to 38% of visitors from other parts of the United Kingdom and 12% 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 Moray, Badenoch & Strathspey Enterprise area (%)

Base: 893 visitors to MBSE area;

708 visitors to MBSE area, staying overnight in Highlands

	Areas visited	Areas Stayed in
Badenoch and Strathspey	77	58
Inverness, Loch Ness and Nairn	64	28
Moray	53	19
Lochaber	25	13
Easter Ross	17	4
Isle of Skye and Lochalsh	16	9
Wester Ross	13	7
Sutherland	9	5
Caithness	6	3
Orkney	1	*
Western Isles	1	*
Total:	100	100

Note - (*) - less than 0.5%

Not surprisingly given that the interviews were conducted in the MBSE area, the largest proportion of visitors interviewed were making a trip to Badenoch and Strathspey during their trip (77%), whilst 53% were visiting Moray. Almost two thirds of them were also visiting the Inverness, Loch Ness and Nairn area however (64%) - the only other part of the Highlands visited by more than half of MBSE's visitor markets. Also significant however were the number of visits to Lochaber: 25% were visiting there. All other parts of the Highlands were visited by fewer than one in five respondents interviewed in Moray, Badenoch and Strathspey.

Generally, visitors to the MBSE area were rather less likely to visit other parts of the Highlands on their trip than visitors to other parts of the Highlands. 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 Moray, Badenoch and Strathspey Enterprise area (9% and 6% respectively). Only a very small proportion of visitors intended travelling to either the Western Isles or Northern Isles on this visit (1% in each case).

Amongst those interviewed in the MBSE area who were staying at least one night in the Highlands, almost six in ten (58%) were staying in Badenoch and Strathspey, whilst one in five (19%) stayed in the Moray district for at least part of their trip. Again, Inverness, Loch Ness and Nairn was a popular overnight destination with almost three in ten tourists staying there (28%). Other than Lochaber where 13% of visitors stayed overnight, no other parts of the Highlands were stayed in by more than ten per cent of visitors to the MBSE area.

Some market segments were more likely than others to be staying overnight in the Moray area:

- those on a touring holiday (41%);
- those staying in B&Bs (28%);
- overseas visitors (29%);
- those visiting friends and relatives (48%).

The following market segments were more likely than others to be staying overnight in Badenoch and Strathspey:

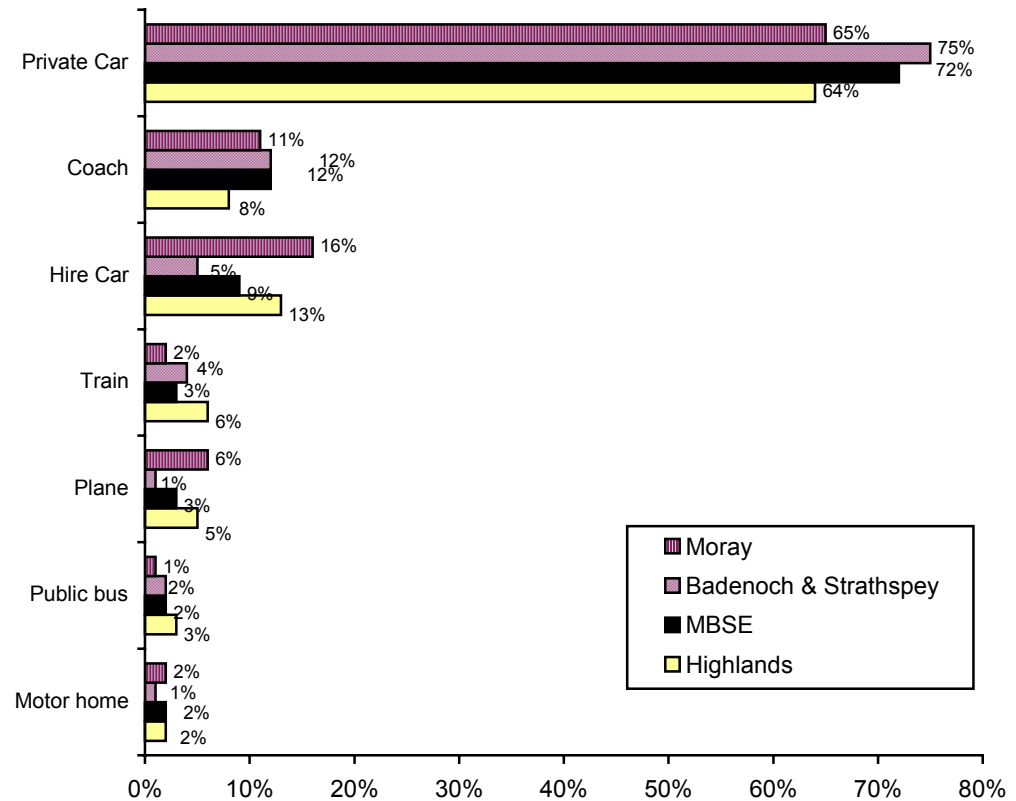
- those on a one-centred holiday (62%);
- those staying in hotels/guesthouses (65%) or in self-catering accommodation (66%);
- those visiting in March, April, October and November (84%);
- UK visitors (64%);
- repeat visitors to the Highlands (62%).

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: 819 visitors to MBSE, non-resident in the Highlands
3,120 visitors to the Highlands



Almost three quarters of visitors to the Moray, Badenoch and Strathspey Enterprise area used their own car on their journey to the Highlands (72%), rather more than the average across the Highlands as a whole (64%). Private coach tours were the only other forms of transport used by more than one in ten visitors to get to the MBSE area (12% overall). Whilst rental cars were used on 9% of trips to get to the Highlands, all other forms of transport were used as the main means to get to the Highlands by 3% or fewer respondents.

The private car was particularly important amongst visitors to Badenoch and Strathspey: 75% of them used this as their main means of getting to the area. Whilst two thirds of visitors to Moray also described the private car as their primary means of travel to the Highlands (65%), the hire car was rather more important, accounting for 16% of visitors. Plane travel, presumably to

Inverness or Aberdeen airports was also rather more important amongst visitors to this part of the area than in Badenoch and Strathspey: 6% used it on the longest part of their journey.

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

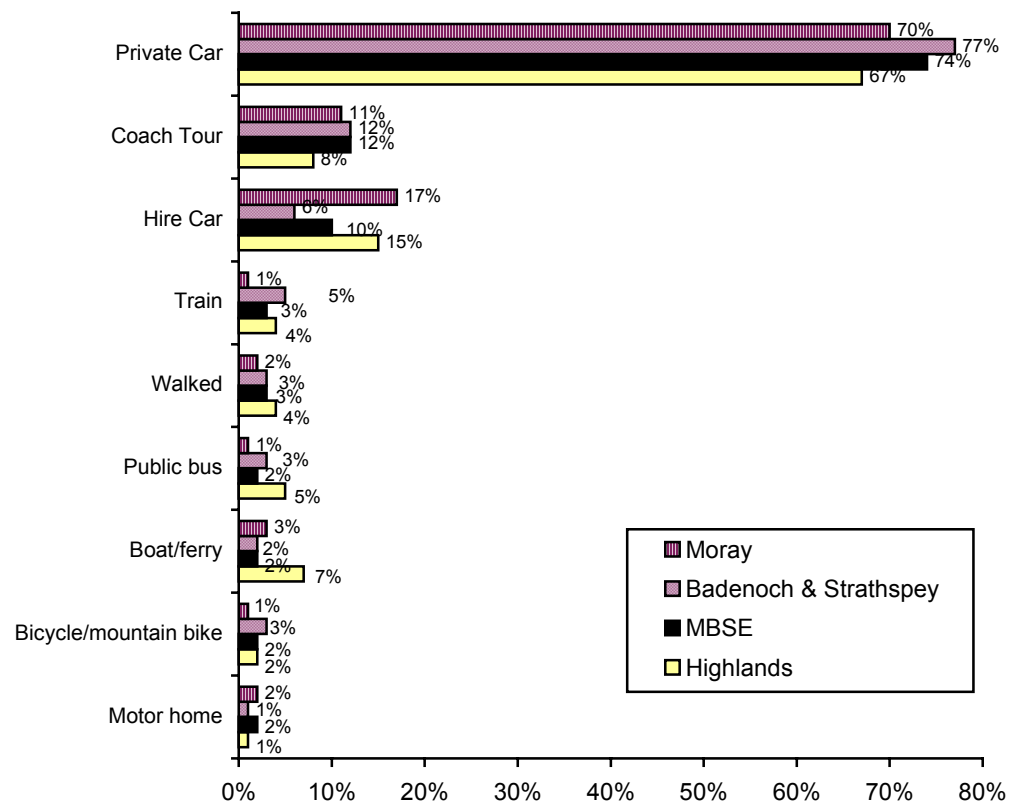
- Under 35s: more likely to use hire cars (14%), less likely to be on coach tours (5%);
- 35-54s: particularly likely to travel by private car (82%);
- Over 55s: more likely to be on a private coach tour (26%);
- ABC1s: more likely to arrive by hire car (21%);
- C2DEs: more likely to be on a coach tour (20%);
- Touring holidays: more likely to arrive by rental car (22%);
- Those on a one-centre holiday: more likely to use their own car to get there (76%);
- Scots visitors: most likely to arrive with their own car (89%);
- Other UK visitors: more likely to be on a coach tour on their journey to the Highlands(20%);
- Overseas visitors: more likely to use rental cars (40%);
- Day trippers: more likely to use their own car (81%).

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: 893 visitors to MBSE area

3,301 visitors to the Highlands



Around three quarters of visitors to the MBSE area used their own car to travel around the Highlands (74%), making this the main form of transport used during their visit. Other than the 12% of visitors to the area who were on private coach tours and the 10% who hired a car, all other forms of transport were used by less than 10% of visitors to the Highlands. As with the main transport type used to get to the area, the main difference between those interviewed in Moray and those interviewed in Badenoch and Strathspey was that a larger proportion of the former group used hire cars (17% compared to 6% of Badenoch and Strathspey visitors), whilst a smaller proportion were using their own cars (70% and 77% respectively).

Looking at the MBSE area as a whole, compared with the Highlands generally, slightly larger proportions of visitors to the MBSE area used private cars or

were on coach tours during their visit, whilst smaller proportions used rental cars or boats and ferries.

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 MBSE area, staying overnight in Highlands
2,936 visitors to the Highlands staying overnight in the Highlands

	Moray	Badenoch & Strathspey	MBSE	Highlands
Hotel/motel	29	29	29	25
Rented house/flat/cottage	13	20	18	15
Bed and Breakfast	29	12	17	28
Staying with friends and relatives	14	7	9	9
Touring caravan	6	9	8	5
Tent	5	7	6	11
Timeshare	1	7	5	2
Static caravan - rented	2	5	4	4
Guest house	4	3	4	5
Youth Hostel	*	2	2	6
Total:	100	100	100	100

Note - (*) - less than 0.5%

Hotels were the most popular form of accommodation used by visitors to the Moray, Badenoch and Strathspey Enterprise area (29%). Self-catering accommodation in rented houses, flats and cottages (18%) and bed and breakfast establishments (17%), were the only other forms of accommodation stayed in by over 10% of visitors. Around 9% of visitors were staying with friends and relatives in the MBSE area, whilst a further 8% were in touring caravans.

Visitors to the Moray area were as likely to stay in bed and breakfast establishments (29%) as they were hotels (29%). Badenoch and Strathspey visitors on the other hand were rather more likely to stay in self-catering accommodation (20%).

When compared with the Highlands as a whole, visitors to the Moray, Badenoch and Strathspey Enterprise area were rather more likely to be staying

in hotels, self-catering accommodation, touring caravans or timeshare units, but rather less likely to stay in bed and breakfast establishments, tents or youth hostels.

As would be expected, there were some major differences in the types of accommodation used amongst the different market segments visiting the MBSE area:

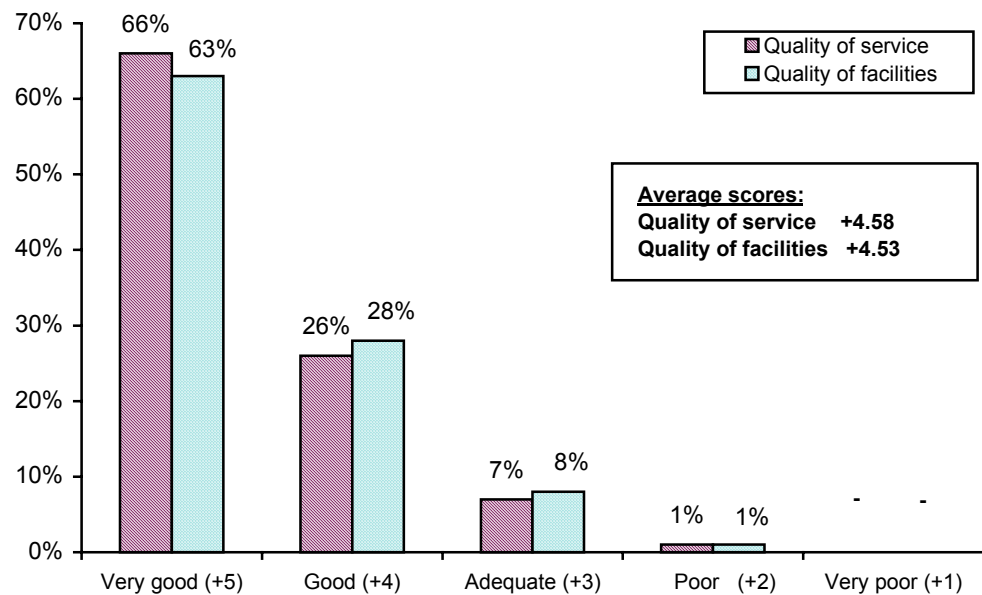
- Visitors aged 55+ years: more likely to stay in hotels (44%), with friends and relatives (13%) or in time share (7%), and less likely to stay in self-catering accommodation (9%) or bed and breakfast establishments (9%);
- Visitors aged 35-54 years: more likely to stay in self-catering accommodation (25%) or touring caravans (11%), but less likely to use hotels (23%);
- Visitors aged under 35 years: more likely to stay in bed and breakfast establishments (30%) or tents (14%), but less likely to stay in hotels/motels (18%), with friends and relatives (4%) or in touring caravans (2%);
- Type of trip: those on a touring trip were more likely to be staying in bed and breakfast establishments (49%), touring caravans (14%) or tents (25%) than those staying in the one location (8%, 7% and 3% respectively). Conversely, tourers were less likely to stay in self-catering accommodation (1%) than those staying in the one location (22%);
- Origin: almost half of the overseas visitors stayed in bed and breakfast establishments (46%), compared to 12% of those from elsewhere in the UK and 8% of Scots. Overseas visitors were also more likely to stay in tents (12%) than their UK (6%) or Scots counterparts (4%). Self catering accommodation was more popular amongst visitors from elsewhere in the UK (22%) than amongst overseas visitors (12%) as was staying in hotels/motels (33% compared to 23%);
- Length of Stay: hotels (42%) were considerably more popular forms of accommodation on 1-3 night breaks in the Highlands than on breaks of 4-7 nights or of 8 or more nights (33% and 11% respectively).

Levels of satisfaction with accommodation

Those people interviewed in the Moray, Badenoch and Strathspey Enterprise 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 Moray, Badenoch and Strathspey Enterprise (%)

Base: 708 visitors to MBSE area staying in commercial accommodation



Note: (-) - nil respondents

Satisfaction levels with their accommodation were generally very high amongst those visitors to the MBSE area who had stayed in commercial accommodation during their trip to the Highlands. Two thirds (66%) described the quality of service as “very good”, whilst a further quarter (26%) described it as “good”. 7% felt the service had only been adequate, whilst only 1% of respondents felt it had been “poor”. No respondents described the service as “very poor”.

Satisfaction levels were similarly high regarding the quality of facilities experienced in their accommodation - 63% described them as “very good”, whilst a further 28% 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 (+4.58) than the quality of facilities (+4.53), although the difference is not statistically significant.

In terms of the quality of service received, satisfaction levels were generally higher amongst those aged 55+ years (+4.72) and visitors from the UK (+4.63) and lower amongst those aged under 35 years (+4.37) and amongst

visitors from overseas (+4.41). Similar patterns were evident in terms of their satisfaction with the facilities on offer. These slightly 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. Generally, the satisfaction levels with accommodation amongst visitors in the MBSE area are very similar to those obtained in other parts of the Highlands.

Activities Undertaken

Visitors were provided with a list of activities and asked to indicate which of them, if any, they had undertaken during their trip, and which they would describe as their main activity. Those activities undertaken whilst visiting the Highlands by more than 5% of respondents interviewed in the Moray, Badenoch and Strathspey Enterprise area are summarised in Table B-9a:

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

Base: 893 visitors to MBSE area
3,301 visitors to the Highlands

	Moray	Badenoch & Strathspey	MBSE	Highlands
Any Sporting activities	48	60	56	59
Low level walking of 2-8 miles	38	44	42	47
Cycling/mountain biking	4	12	9	8
Hill walking/low level walks >8 miles	3	11	8	11
Golf	6	9	8	6
Game Fishing	4	6	6	5
Horse riding/pony trekking	2	6	5	3
No sporting activities	52	40	44	41
Any non-sporting activities	98	96	97	98
General sightseeing/touring	91	86	88	91
Shopping	63	62	62	58
Museum/art gallery/heritage cen.	53	34	41	42
Wildlife attraction	18	30	26	25
Leisure centre/swimming pool	11	23	18	14
Concert/ceilidh/theatre/cinema	8	13	11	11
Archaeological site	16	9	11	17
No non-sporting activities	2	4	3	2
Total:	100	100	100	100

Whilst just over half of those interviewed in the MBSE 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 (97%).

The most common sporting activity was *low level walking* of between two and eight miles distance: over four in ten of the visitors to the area had participated in this activity during their trip (42%) making this far and away the most popular sporting/outdoor activity. Cycling/mountain biking, higher level walking and golf were all undertaken by 8-9% of visitors to the area making these the next most popular activities undertaken.

As might be expected, *general sightseeing and touring* was the most commonly cited non-sporting activity undertaken by visitors to the Moray, Badenoch and Strathspey Enterprise area, carried out by around nine visitors in every ten (88%). Over three in five (62%) went shopping during their visit to the Highlands, whilst visits to museums, galleries and heritage centres were made by more than four in ten visitors (41%). Four other non-sporting activities were undertaken by more than 5% of visitors: visits to wildlife attractions (26%), leisure centres and swimming pools (18%), archaeological sites (11%), and concerts/ceilidhs/theatre /cinema (11%).

There were also some variations between the two parts of the MBSE area. Visitors to Badenoch and Strathspey were more likely to take part in sporting and outdoor activities (60%) than their counterparts in Moray (48%). Other than low level walking (38%) and golf (6%), no activities were undertaken by more than 5% of visitors to Moray. In contrast, in Badenoch and Strathspey, six activities were carried out by at least 5% of visitors. In terms of non sporting activities, visitors to Moray were rather more likely to be visiting museums, galleries and heritage centres (53%) or to go general sightseeing (91%). In Badenoch and Strathspey, visits to swimming pools and leisure centres (23%) and wildlife attractions (30%) were rather more popular.

Table B-9b provides information on those activities undertaken as the main reason for the trip amongst visitors to the MBSE area. Those mentioned by 2% or more respondents are listed:

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

Base: 893 visitors to MBSE area
3,301 visitors to the Highlands

	Moray	Badenoch & Strathspey	MBSE	Highlands
Any Sporting activities	9	23	18	17
Low level walking of 2-8 miles	7	10	9	8
Golf	1	3	2	3
Hill walking/low level walks >8mi	*	3	2	1
No sporting activities	52	77	82	83
Any non-sporting activities	90	75	80	82
General sightseeing/touring	81	65	71	75
Museum/art gallery/heritage cen.	3	2	2	1
Shopping	3	2	2	2
No non-sporting activities	10	25	20	18
Total:	100	100	100	100

When asked to indicate which one activity, if any, could be described as their main activity during their trip, only 18% of visitors mentioned a sporting activity, with low level walking (9%) described most frequently, followed by golf (2%) and hillwalking (2%). As many as 80% described a non-sporting activity however, with general sightseeing/touring far and away the main activity undertaken (71% of visitors). Again, visitors to Badenoch and Strathspey were rather more likely to be on a sporting holiday (23%) than visitors to Moray (9%). Sightseeing and touring was the main purpose of over four trips in every five to Moray (81%), significantly more than the 65% who described it as such in Badenoch and Strathspey.

Attractions visited and levels of satisfaction

Attractions visited

Respondents interviewed in Badenoch and Strathspey and in Moray were presented with separate lists 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 MBSE area (%)

Base: 590 visitors to Badenoch and Strathspey; 303 visitors to Moray

	Badenoch & Strathspey respondents		Moray respondents
Cairngorm Chairlift (*)	41	Baxters of Speyside Visitor Centre (*)	54
Landmark, Carrbridge (*)	29	Glenfiddich Distillery, Keith (*)	41
Speyside Heather Centre (*)	27	Brodie Castle, Forres (*)	34
Loch Morlich	26	Elgin Cathedral	21
Waltzing Waters, Newtonmore (*)	20	Cashmere Visitor Centre, Elgin (*)	18
Rothiemurchus Visitor Centre (*)	19	Speyside Cooperage Visitor Centre	10
Strathspey Steam Railway	18	Ballindalloch Castle	9
Glenmore Forest Park Visitor Centre	17	Speyside Way	9
Loch Garten Nature Reserve	15	Buckie Drifter, Buckie	7
Loch An Eilean	14	Glenlivet Distillery, Glenlivet	6
Highland Wildlife Park, Kincaig	13	Cardhu Distillery, Aberlour	6
Loch Insh	11	Glen Grant Distillery and Gardens, Rothes	6
Reindeer Centre, Glenmore	11	Elgin Museum	5
Santa Claus Land, Aviemore	10	Dallas Dhu Distillery, Forres	4
Revack Country Estate and Visitor Cen.	8	Spynie Palace	4
Dalwhinnie Distillery	7	Tugnet Ice House, Spey Bay	4
Folk Museum, Kingussie	6	Strathisla Distillery Visitor Centre, Keith	4
RSPB Insh Marshes Reserve	5	The Village Store, Aberlour	4
Clan MacPherson Museum, Newtonmore	3	Tomintoul Museum	3
Folk Park, Newtonmore	1	Glenfarclas Distillery, Ballindalloch	2
Total:	100	Total:	100

(*) - Interview locations.

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.

In Badenoch and Strathspey, most popular was the Cairngorm Chairlift: two in five respondents had visited this attraction on their trip (41%). Three attractions were visited by just over a quarter of respondents however: Landmark Visitor Centre (29%), Speyside Heather Centre (27%) and Loch

Morlich (26%). Generally, a wide range of attractions had been visited by respondents in Badenoch and Strathspey. Fourteen of them had been visited by at least 10% of visitors to the area, and consequently this part of the Highlands represents the area with the highest visitation rates to its attractions.

In Moray, a wide range of attractions were again listed, however in this case, only six of them had been visited by over 10% of respondents. Baxters of Speyside Visitor Centre was mentioned by over half of the respondents (54%), although it must be borne in mind that 130 of the 303 interviews were undertaken there. Glenfiddich Distillery and Brodie Castle were both visited by over a third of visitors to Moray, whilst Elgin cathedral was visited on one trip in every five to the district (21%). The huge range of whisky distilleries in the area is reflected in this table, although other than Glenfiddich, none were visited by more than 6% of respondents.

The main attractions in the two areas of the region had a number of key characteristics in terms of the types of respondents **most likely to visit**:

- *Cairngorm Chairlift (41% overall)*: those aged under 35 (44%), ABC1s (46%), those staying in the one location (49%), those staying in hotels (53%) or in self-catering accommodation (54%), visitors from elsewhere in the UK (53%) and those staying for eight nights or more (50%);
- *Landmark (29% overall)*: those aged 35-54 (34%), those staying in the one location (34%), those staying in self-catering accommodation (39%), and amongst Scots visitors (41%);
- *Speyside Heather Centre (27% overall)*: those aged 55+ years (38%), and amongst visitors in October and November (57%);
- *Baxters of Speyside (54% overall)*: those aged 55+ years (74%), C2DEs (73%), Scots visitors (73%), day trippers (78%) and amongst those who had been in the Highlands before (65%);
- *Glenfiddich Distillery (41% overall)*: those aged under 35 years (62%), those on a touring holiday (65%), those staying in B&Bs (58%), overseas visitors (65%), and amongst those visiting the Highlands for the first time (64%);

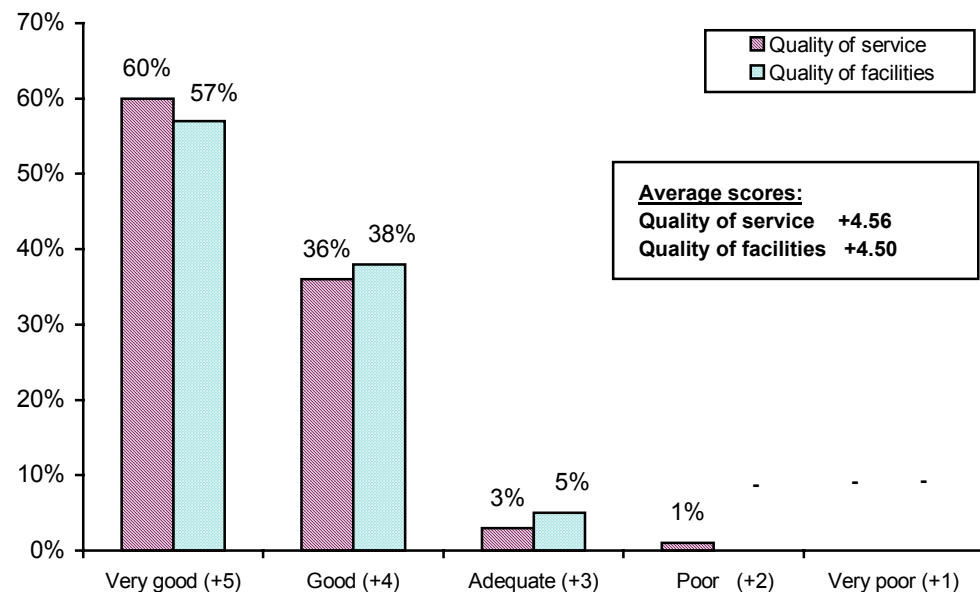
- *Brodie Castle (34% overall)*: those on a touring holiday (49%), from elsewhere in the UK (37%) or overseas (37%), and staying in the Highlands for at least eight nights (49%).

Levels of satisfaction with attractions

Those people interviewed in the Moray, Badenoch and Strathspey Enterprise 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 Moray, Badenoch and Strathspey Enterprise area (%)

Base: 893 visitors to MBSE area



Note: (-) - nil respondents

Satisfaction levels with attractions visited in the Highlands were generally very high amongst visitors to the MBSE area. Three in five (60%) described the quality of service as “very good”, whilst a further 36% described it as “good”. Only 3% 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 (57% and 38% 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 (+4.56) than the quality of facilities (+4.50), although the difference is not significant.

In terms of the quality of service received, satisfaction levels were generally higher amongst those aged 55+ years (+4.70), visitors to Moray (+4.65) and visitors on a day trip from home (+4.63). Satisfaction was slightly lower amongst those aged under 35 years (+4.35) and amongst visitors to Badenoch and Strathspey (+4.49). 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

Fewer than one in four of those interviewed in the Moray, Badenoch and Strathspey Enterprise area had already visited a Tourist Information Centre (TIC) during their visit to the Highlands (37%), a much lower proportion than that for the Highlands as a whole (56%). There were no significant differences in this figure between the two parts of the region: 37% of Moray visitors had visited a TIC compared with 36% of Badenoch and Strathspey visitors.

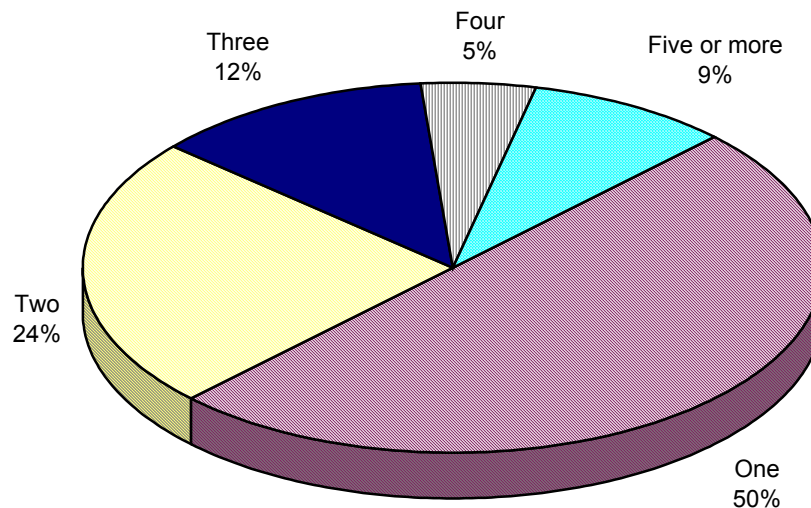
As in other parts of the Highlands, the types of visitors to TICs were fairly similar. Those most likely to have visited a TIC included visitors aged under 35 years (50%), ABC1s (40%), those on a touring holiday (74%), visitors staying in bed and breakfast establishments (70%), overseas visitors (66%), those staying for eight nights or more (59%), and those making their first ever trip to the Highlands (60%). The lower proportion of TIC visits amongst visitors to this area is perhaps a reflection of the larger proportion of day trippers interviewed: only 7% of day trippers had visited a TIC on their day out from home, as opposed to 43% of holiday visitors.

Amongst the 63% of visitors who had not visited a TIC on their trip, only around 16% of them intended to visit one at some stage, whereas four in five had no intention of visiting a TIC (79%). In total therefore, less than half of the visitors had either already visited or intended to visit a TIC on their trip (47%), significantly lower than the proportions recorded elsewhere in the Highlands.

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

Figure B-12 - Number of visits to Highland TICs

Base: 326 respondents in MBSE area who had visited a TIC



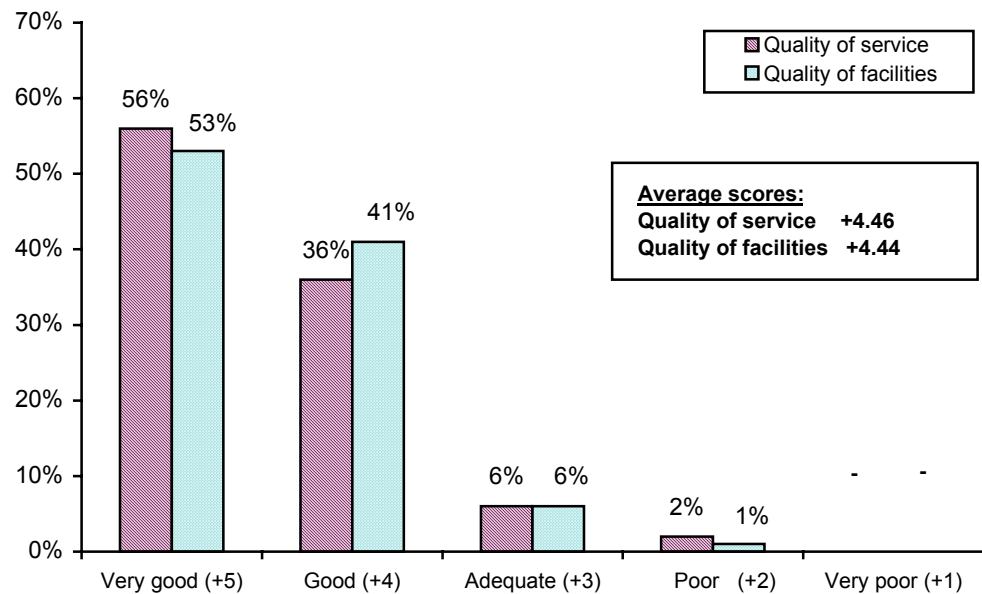
Half of those interviewed had visited one Tourist Information Centre on their visit to the Highlands (50%), however a quarter had made two visits (24%), and 26% had visited three or more times. On average, respondents had made 2.2 visits to TICs on their trip to the Highlands. Those aged under 35 years (2.24 visits), ABC1s (2.22 visits), those staying in bed and breakfast establishments (2.77 visits), overseas visitors (3.20 visits), and those on their first ever visit to the Highlands (2.58 visits), were more likely to have made a greater number of visits to TICs.

Levels of satisfaction with Tourist Information Centres

Those people interviewed in the Moray, Badenoch and Strathspey Enterprise 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 Moray, Badenoch and Strathspey Enterprise area (%)

Base: 326 visitors to MBSE area 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, over half described them as “very good” (56% and 53% respectively), and around two in five (36% and 41%) described them as good. Encouragingly, only 2% of TIC visitors (N=5) described the service received as “poor” and 1% described the facilities on offer as “poor” (N=4).

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 very similar satisfaction scores

of +4.46 and +4.44 respectively. There were no statistically significant variations in these scores amongst any of the key market segments.

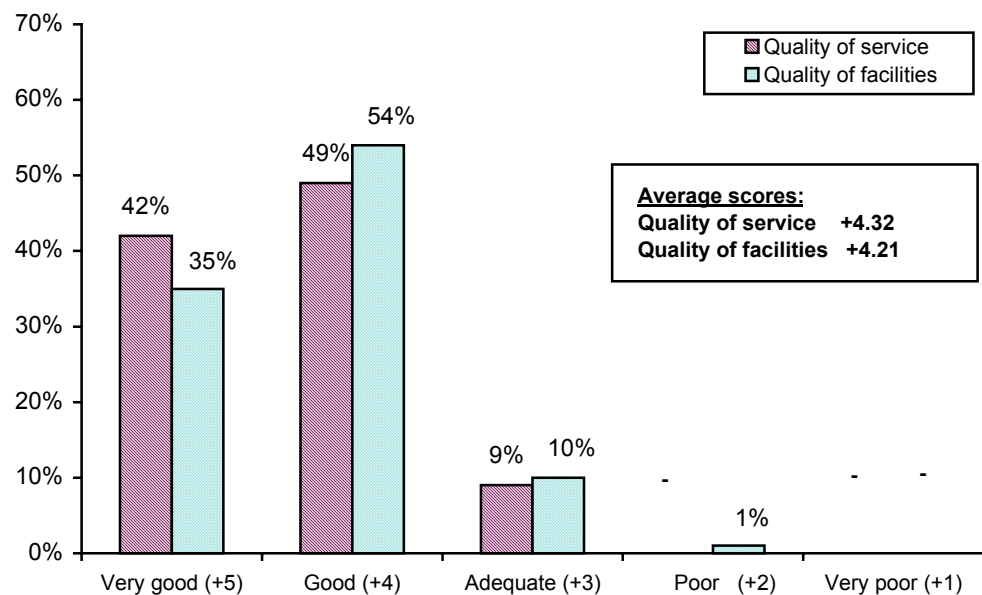
Levels of satisfaction with shops, pubs and restaurants

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 Moray, Badenoch and Strathspey Enterprise area (%)

Base: 893 visitors to MBSE area



Note: (-) - nil respondents

Overall levels of satisfaction with both the quality of service and facilities on offer in Highland shops were encouraging, with just over four in ten describing the service in shops as “very good” (42%), whilst around half (49%) described it as “good”. In terms of the quality of facilities, the balance was rather more towards “good” (54%) than “very good” (35%).

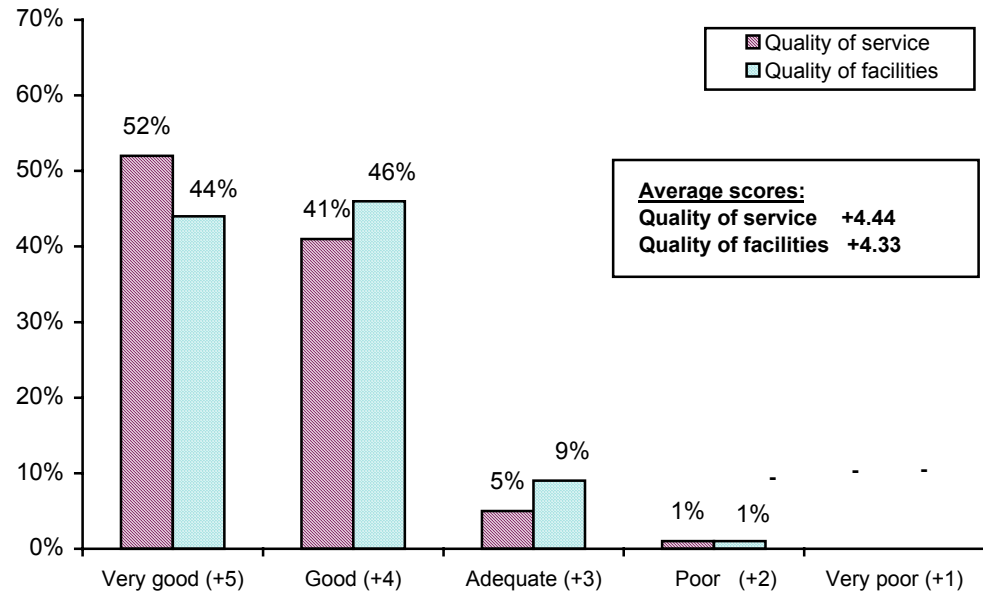
Scores of +4.32 (service) and +4.21 (facilities) were obtained on average amongst the 893 respondents interviewed. Those respondents under the age

of 35 years were rather less satisfied with the service and facilities (+4.12 and 4.07 respectively).

Pubs and Restaurants

Figure B-15 - Rating of pubs/restaurants by visitors to MBSE area (%)

Base: 893 visitors to MBSE area



Note: (-) - nil respondents

As with other aspects of the Highland tourism product, visitors to the MBSE 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” (52%), whilst a further 41% described it as “good”.

On average, the quality of service achieved an average score of +4.44 and the facilities achieved a score of +4.33. Once again, satisfaction levels would appear to be highest amongst older visitors and lowest amongst those from overseas.

Overall levels of Satisfaction

Improvements which would have made the visit more enjoyable

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

Table B-11 - Improvements which would make trip to Highlands more enjoyable (%)

Base: 893 visitors to the MBSE area

	Badenoch & Strathspey	Moray	MBSE
More/better signposting	7	7	7
Any references to improvements to attractions	8	4	7
Not enough tourist information	4	6	5
Better quality/less expensive eating out	3	7	4
Increased opening times - attractions, TICs, toilets, shops etc.	4	4	4
Improvements to roads	3	4	3
Any references to improvements to accommodation	2	4	3
Too expensive	2	4	3
More parking needed, too expensive	3	2	3
Toilet facilities - more needed	3	*	2
Not enough for children/young people	2	2	2
Nothing at all/very little	55	53	55
Total:	100	100	100

Encouragingly, over half of those interviewed in the MBSE area did not believe the local bodies responsible for tourism to the Highlands could have done anything to improve their trip (55%). 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 7% of visitors across the area as a whole. Improved signposting and all sorts of references to improvements to attractions were made by 7% of respondents, whilst 5% criticised the lack of tourist information. The two main suggestions were more frequently cited by the following segments:

- *More/better signposting:* those aged under 35 years (10%), overseas visitors (12%) and those on their first visit to the Highlands (10%);
- *Improvements to attractions:* those aged under 35 years (10%) and Scots visitors (11%).

The Malt Whisky Trail

Section B of the questionnaires used in the survey contained a series of questions which were specially tailored for each area of the Highlands. The Badenoch and Strathspey questionnaire focused on Aviemore and the responses are detailed in the next section. The Moray questionnaire contained a series of questions on awareness and interest in the Malt Whisky Trail.

Initially, Moray respondents were asked to what extent they associated Scotch Whisky with the Moray area:

Table B-12: Association of Scotch Whisky with Moray (%)
Base: 303 visitors to Moray

	Moray respondents
A lot	59
A little	15
Not at all	23
Don't Know	3
Total:	100

Around three Moray visitors in every five saw a clear association between whisky and Moray (59%), whilst a further 15% felt there was an association albeit rather less. Interestingly, almost a quarter (23%) would not associate whisky and Moray at all.

Levels of knowledge clearly varied amongst some of the key origins of visitors, illustrating the degree of “education” required if whisky is to be promoted as a Moray brand. Some 42% of overseas visitors would not associate whisky with Moray at all, compared to only 8% of Scots.

As many as **85% of visitors to Moray were aware of the Malt Whisky Trail**, indicating a very high level of previous knowledge. Again, levels of awareness declined with distance from the area: 96% of Scots visitors had heard of the Trail, compared with 86% of visitors from elsewhere in the UK and 70% of overseas visitors. Despite these differences, overall levels of awareness were particularly high suggesting that promotion of the Trail was fairly successful amongst visitors to the area.

Those visitors who were aware of the malt Whisky Trail were then asked to list which distilleries they believed were featured on the Trail. A variety of answers were provided and are indicated in Table B-13 below:

Table B-13: Distilleries believed to feature on Malt Whisky Trail (%)

Base: 259 Respondents who were aware of the Trail

	Moray respondents aware of Malt Whisky Trail
◆ Glenfiddich Distillery, Dufftown	72
◆ Glenlivet Distillery, Glenlivet	37
◆ Glen Grant Distillery, Rothes	31
◆ Cardhu Distillery, Aberlour	18
◆ Glenfarclas Distillery, Ballindalloch	16
◆ Strathisla Distillery, Keith	15
◆ Dallas Dhu Distillery, Forres	6
Tamdhu Distillery	2
Knockandu Distillery	2
Macallan Distillery	2
White Horse Distillery	2
Balvenie Distillery	1
Glenmorangie Distillery	1
Chivas Regal Distillery	1
Teachers Distillery	*
Glenronach Distillery	*
Others	4
Don't Know	16
Total:	100

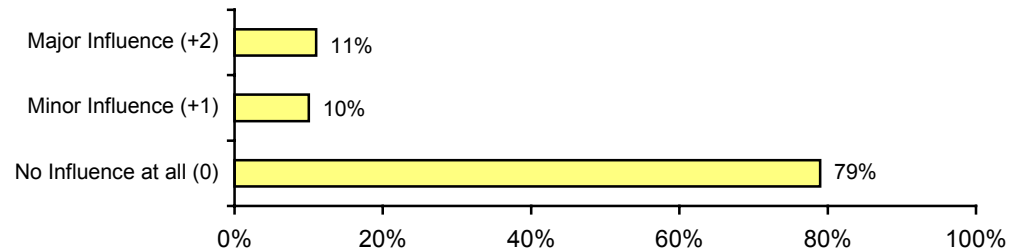
◆ Feature on the Malt Whisky Trail

* Less than 0.5%

It must be borne in mind that a large proportion of the interviews in Moray were conducted at Glenfiddich Distillery (26%), and consequently, awareness of Glenfiddich is artificially inflated relative to the other distilleries in the above figures. Even with that caveat however, it is clear that three distilleries in particular were assumed to form part of the Trail by significant proportions of visitors: Glenfiddich, Glenlivet and Glen Grant. Whilst Cardhu, Glenfarclas and Strathisla were mentioned by 15-18% of respondents, lowest levels of awareness of distilleries which actually appeared on the Trail were reserved for Dallas Dhu (6%).

Those respondents aware of the Trail were then asked to indicate the extent to which it had influenced their decision to visit Moray:

Figure B-16: Extent to which Malt Whisky Trail influenced visit to Moray (%)
Base: 259 Respondents aware of the Malt Whisky Trail



For four in five visitors to Moray, the Malt Whisky Trail had had no influence on their decision to visit at all (79%). Some 10% claimed it had had a minor influence on their decision to visit, whilst 11% claimed it had had a major influence. The following segments would appear to have been influenced rather more:

- Visitors aged under 35 years (25% described it as a major influence)
- Those on a touring holiday (27%)
- Overseas visitors (27%)
- First time visitors to the Highlands (21%)

Finally, everybody interviewed in Moray was shown a copy of the leaflet used to promote the Malt Whisky Trail. Just over a third of them had seen it before (34%), with Scots visitors (38%) and those who had been to the Highlands before (38%) most likely to recognise it.

Amongst those 103 respondents who had seen it before, 86% said it had had no influence on their decision to visit Moray, whilst only 6% said it had been a major influence. Therefore, based on the whole sample of respondents in Moray (N=303), some 6 respondents described the leaflet as having had a major influence on their decision to visit the area (2%).

Aviemore

Badenoch and Strathspey respondents were asked a series of questions about Aviemore. Firstly, respondents were asked to indicate whether or not they had visited Aviemore during their trip to Badenoch and Strathspey. In total, some 56% of them had done so, and the following segments were **most likely** to have visited:

- Under 35s (66%); those on one-centre holidays (65%); those staying in self-catering units (73%); those visiting in March, April, October or November (70%); and those staying for eight nights or more (66%);

The following segments were **least likely** to have visited Aviemore:

- Those aged 55+ years (42%) and those on a day out (32%).

Amongst those who had visited Aviemore on their trip, the following proportions had used the following facilities in the town:

Table B-14: Facilities used in Aviemore (%)

Base: 332 respondents who had visited Aviemore on their current visit

	Badenoch & Strathspey respondents who had visited Aviemore
Shops (convenience)	69
Restaurants/cafes/carry out food	56
Shops (speciality/gifts)	56
Petrol Station	36
Public Toilets	29
Tourist Information Centre	26
Bar/public house	24
Tourist accommodation	17
Cinema	2
None of these	6
Total:	100

Three facilities were used by over half of those respondents who had visited Aviemore: shops (for convenience shopping), shops (for gifts etc) and restaurants, cafes and carry out food establishments (69%, 56% and 56% respectively). Just over a third had visited the Petrol Station, whilst 24-29% had visited bars/public houses, the local TIC, and public toilets in the town. As would be expected, those visitors staying in the one location were more likely to use most of Aviemore's facilities than those who were simply passing through.

The 26% of respondents who had visited the Tourist Information Centre in Aviemore were asked to indicate the main reasons for visiting this facility, and clearly, general information about the area was the main reason for visiting:

- general information on the area 40%
- to book accommodation 20%
- to ask directions 19%
- to get a map/guidebook 9%
- to get What's On information 8%

Table B-15 below provides an indication of the length of time spent in Aviemore by visitors to the village:

Table B-15: Amount of time spent in Aviemore (%)

Base: 332 respondents who had visited Aviemore on their current visit

	Badenoch & Strathspey respondents who had visited Aviemore
Day Trippers	66
Less than one hour	17
1-2 hours	21
2-4 hours	17
4+ hours	11
Overnight Visitors	34
1-2 nights	11
3-4 nights	8
5-6 nights	3
7 nights	8
8+ nights	4
Total:	100

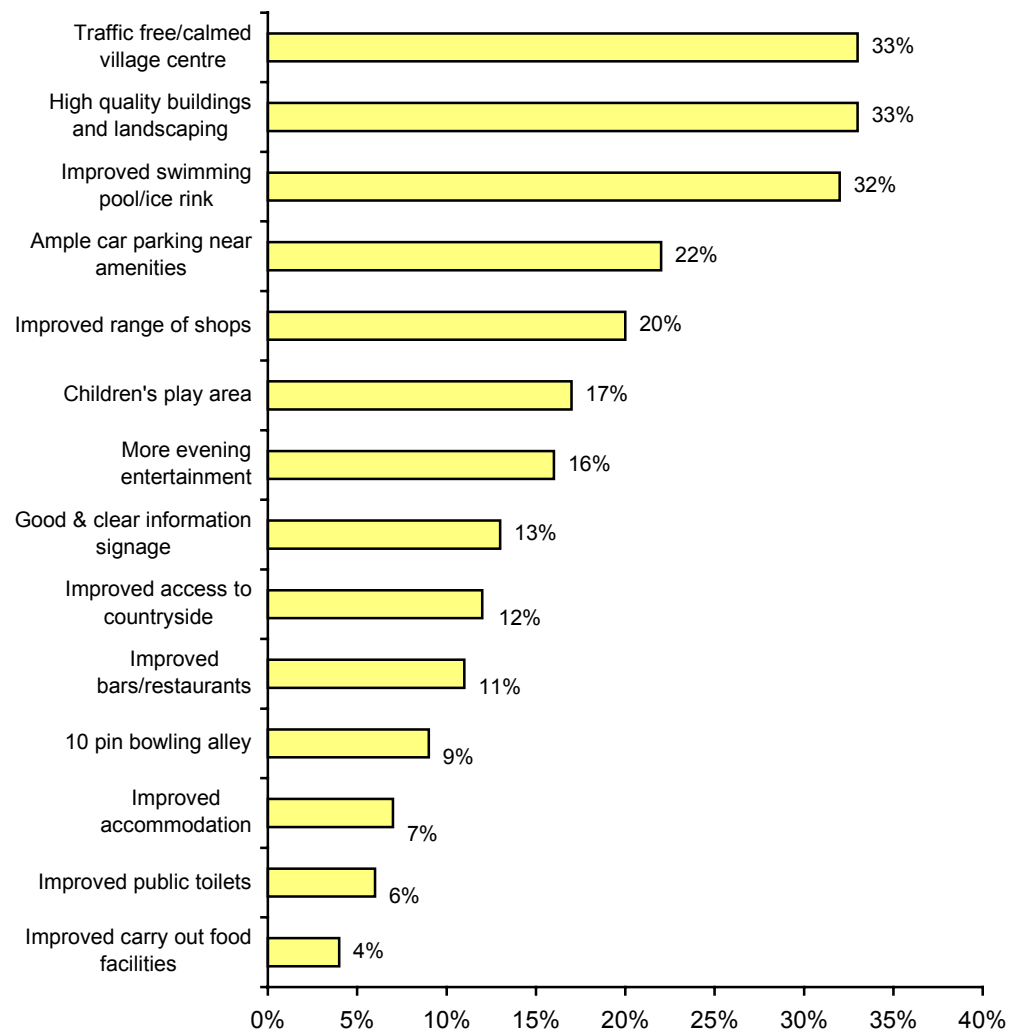
Two thirds of those who had visited Aviemore on their trip had not stayed overnight - they had been day visitors (66%). The most common length of stay in the village amongst this group was between one and two hours (21%), although 17% had stayed for less than that, and 28% had stayed for longer on a day trip.

Of the 34% of visitors who stayed overnight in Aviemore, there was a wide range in the lengths of stay recorded: just under one in five (19%) stayed for four nights or fewer, whilst 12% stayed in the village for at least a week.

Finally, visitors to Aviemore were shown a list of proposed developments in Aviemore, and asked to indicate which of them they felt sounded the most important for the village:

Figure B-17: Most popular proposed developments to Aviemore (%)

Base: 332 respondents who had visited Aviemore on their current trip



Amongst visitors to Aviemore, three of the listed proposals emerged as being equally important and most popular: the creation of a traffic-free or traffic-calmed centre (33%), high quality buildings and landscaping using natural materials (33%), and improvements to the swimming pool and ice rink complex (32%). Whilst the provision of ample car parking facilities in the vicinity of the village's amenities (22%) and improvements to the range of shops (20%) were also relatively popular suggestions, all other proposed

developments were mentioned by fewer than one visitor in every five to the village.

Expenditure

Visitors to the Moray, Badenoch and Strathspey area were asked to indicate how much they had spent on their trip to the Highlands. With just over 100 respondents on a day trip, this does not represent a large enough sample to undertake any detailed analysis of their spending patterns. Consequently, the analysis of expenditure provided below refers to the 772 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-18 provides the average expenditure daily expenditure by respondents (including that spent on others) and daily expenditure per person, per day:

Table B-16 - Amount spent per day

Base: 772 visitors to the MBSE 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 MBSE area	in the Highlands	in MBSE area	in the Highlands
Accommodation	£39	£38	£18	£18
Food and drink (outside accommodation)	£22	£23	£9	£10
Entertainment	£6	£5	£2	£2
Shopping	£16	£14	£8	£7
Transport	£9	£12	£4	£6
Total:	£92	£92	£41	£43

Typically, respondents in the MBSE area spent £92 per day during their trip to the Highlands on themselves and others in their party, a similar amount to the average in the Highlands as a whole. This averaged out at a spend of £41 per person per day. Accommodation spend accounted for the largest proportion of this expenditure (44%) followed by food and drink (22%).

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

- those on touring holidays (£48), those staying in bed and breakfast establishments (£50) and in hotels (£59), overseas visitors (£59), visitors to Moray (£45), and those visitors on their first trip to the Highlands (£49).

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

- C2DEs (£34), those who were caravanning/camping (£25), Scots visitors (£32), and visitors to Badenoch and Strathspey (£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 MBSE area. Figures are also provided for comparison of spend per trip to the Highlands as a whole:

Table B-17 - Amount spent per trip

Base: 772 visitors to the MBSE 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 MBSE area	in the Highlands	in MBSE area	in the Highlands
<i>Average length of Stay</i>	<i>3.9 nights</i>	<i>7.0 nights</i>	<i>3.9 nights</i>	<i>7.0 nights</i>
Accommodation	£152	£266	£70	£126
Food and drink (outside accommodation)	£86	£161	£35	£70
Entertainment	£23	£35	£8	£14
Shopping	£62	£98	£31	£49
Transport	£35	£84	£16	£42
Total:	£358	£644	£160	£301

Typically, respondents in the MBSE area spent just over £350 during their trip to the area on themselves and others in their party. This averaged out at a spend of around £160 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).

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

- those aged 55+ years (£164), those who were staying in the one location on their trip (£171), those who were self-catering (£232), and visitors from other parts of the UK (£172).

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

- those aged under 35 years (£135), C2DEs (£136), those on touring holidays (£80), those staying in bed and breakfast establishments (£75) or who were camping/caravanning (£95), and Scots visitors (£125).

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 MBSE area amongst the different market segments. This is summarised in Table B-16 below:

Table B-18 - Spending per party in the Moray, Badenoch and Strathspey Enterprise area

Base: 521 visitors to the MBSE area staying overnight in the Highlands

Spend in Moray, Badenoch and Strathspey Enterprise 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	£41	3.3 nights	£135	3.3 people	£445
35-54	£36	4.0 nights	£144	3.4 people	£490
55+	£39	4.2 nights	£164	2.6 people	£426
<i>Social Class</i>					
ABC1	£41	3.8 nights	£156	3.1 people	£484
C2DE	£34	4.0 nights	£136	3.2 people	£436
<i>Type of Holiday</i>					
Centred	£38	4.5 nights	£171	3.3 people	£564
Staying in 2 or 3 locations	£49	2.6 nights	£127	2.7 people	£343
Touring	£47	1.7 nights	£80	2.6 people	£208
<i>Accommodation Used</i>					
Hotels/Guesthouses	£59	2.8 nights	£165	2.6 people	£429
Bed and Breakfasts	£50	1.5 nights	£75	2.6 people	£195
Self-catering	£38	6.1 nights	£232	4.2 people	£974
Caravan/Camping	£25	3.8 nights	£95	3.1 people	£295
<i>Origin</i>					
Scotland	£32	3.9 nights	£125	3.3 people	£412
Other UK	£39	4.4 nights	£172	3.0 people	£516
Overseas	£59	2.5 nights	£148	3.0 people	£444
<i>Area</i>					
Moray	£45	2.4 nights	£108	3.0 people	£324
Badenoch & Strathspey	£35	4.5 nights	£158	3.2 people	£506
Total:	£41	3.9 nights	£160	3.1 people	£496

In terms of total trip spending per party in the MBSE area, the average spend was around £500. The highest spenders were those staying in self-catering establishments (£974), a reflection of their long stays locally and larger party sizes. On the other hand, lowest spenders were those on touring holidays and those staying in bed and breakfast establishments (each at around £200).

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 Moray, Badenoch and Strathspey 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 both the Moray and the Badenoch and Strathspey areas, illustrating which of the lifestyle characteristics were most significant, and consequently which market segments would be likely to produce most *gains* to each 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 both Moray and in Badenoch and Strathspey follows overleaf.

Visits to Moray – 9% Share overall

Dependent and Predictor Variables

Dependent variable: those visiting Moray;
 Predictor variables: age; social class; origin; incidence of children present; 1st 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 Moray area. For example, 12% of overseas residents with children in their household who were visiting the Highlands visited Moray. The second column shows the propensity of that group to visit the Moray area in comparison with the average for other parts of the Highlands. For example, the same group of overseas residents with dependent children are 25% more likely to visit the Moray 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 Scots, aged 65+	23%	+156%
- Highland residents	12%	+34%
- Overseas residents, children in the household	12%	+25%
- Overseas residents, no children in household, on repeat visit	10%	+12%
- Other Scots residents, aged 35-64, no children in household	10%	+11%
- Overseas residents, no children in the household on 1 st ever visit	9%	-4%
- Other UK residents, on 1 st ever visit to Highlands, aged 45-54	9%	-5%
- Other Scots residents, aged under 65, children in household	8%	-8%
- Other UK residents, on repeat visit	8%	-12%
- Other UK residents, on 1 st ever visit to Highlands, aged 55+	5%	-43%
- Other UK residents, on 1 st ever visit to Highlands, aged under 45	5%	-43%
- Other Scots residents, aged under 35, no children in household	3%	-64%

The Moray area was most popular amongst Scots aged over 65 years – they were 156% more likely to visit this area than the average. Highland residents and other Scots residents (without dependent children) also displayed above average likelihood to visit Moray, however visitors from other parts of the UK were slightly less likely to visit.

Visits to Badenoch and Strathspey – 18% Share overall

Dependent and Predictor Variables

Dependent variable: those visiting Badenoch and Strathspey;
 Predictor variables: age; social class; origin; incidence of children present; 1st 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 Badenoch and Strathspey area. For example, 26% of other UK residents on their first ever visit to the Highlands and aged 55+ visited Badenoch and Strathspey. The second column shows the propensity of that group to visit the Badenoch and Strathspey area in comparison with the average for other parts of the Highlands. For example, the same group of other UK residents on their first visit to the Highlands and aged 55+ are 47% more likely to visit Badenoch and Strathspey 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 Scots residents, aged under 65, children in household	37%	+109%
- Highland residents	27%	+53%
- Other UK residents, on 1 st ever visit to Highlands, aged 55+	26%	+47%
- Other Scots, aged 65+	24%	+35%
- Other Scots residents, aged 35-64, no children in household	23%	+28%
- Other Scots residents, aged under 35, no children in household	22%	+22%
- Other UK residents, on repeat visit	19%	+7%
- Other UK residents, on 1 st ever visit to Highlands, aged under 45	14%	-21%
- Overseas residents, children in the household	11%	-41%
- Other UK residents, on 1 st ever visit to Highlands, aged 45-54	10%	-44%
- Overseas residents, no children in the household on 1 st ever visit	6%	-66%
- Overseas residents, no children in household, on repeat visit	4%	-75%

The appeal of Badenoch and Strathspey to UK residents as opposed to overseas residents is clear. In particular, Scots with children in the household are most likely to visit the area (109% more likely than average). It was also popular amongst Highland residents (+53%), other UK residents aged 55+ on their first ever visit to the Highlands (+47%) and amongst Scots aged 65+

years (+35%). The area held least appeal amongst overseas residents with no dependent children in the household.

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

