

***HIGHLANDS VISITOR SURVEY:  
WINTER SURVEYS, 1998  
BADENOCH & STRATHSPEY  
AND LOCHABER AREAS  
Final Report***



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## Executive summary

- The majority of winter visitors to both Badenoch and Strathspey and Lochaber were staying away from home overnight (90% and 84% respectively, and a winter average of 87%) - a slightly higher proportion to that recorded in the Highlands as a whole during the 1997 March-November period (84%). Only 6% of winter visitors interviewed were on a day trip from home, a similar proportion to the March-November period (7%).
- Four in five winter trips to Lochaber and Badenoch and Strathspey were not touring in nature (81%), a significantly higher proportion than the average for the Highlands as a whole during the March to November period (53%). Only 4% of winter visits were truly “touring” in nature, considerably lower than the main season average for the Highlands (17%);
- The age profile of winter visitors to both Badenoch and Strathspey and Lochaber is significantly younger than the main season age profile. Over two thirds of winter visitors (69%) were aged under 45 years compared with just under half of main season visitors to the Highlands (49%). Winter visitors to Lochaber were younger than their counterparts in Badenoch and Strathspey (75% and 63% respectively were aged under 45 years). Only 10% of those interviewed during the winter months were aged 55 years or over, compared with 29% of those interviewed during the March-November period in 1997;
- As with visitors to the Highlands during the main season, those visiting Lochaber and Badenoch and Strathspey during the winter were fairly upmarket in their profile: around two thirds of winter visitors were ABC1s (67%). There is evidence however that those interviewed during the winter were slightly less upmarket than those interviewed during the main season: 29% of the former were ABs compared to 35% of the latter group. Visitors to Lochaber were rather more likely to be ABC1s than those visiting Badenoch and Strathspey however (74% and 61% respectively);
- Only 9% of winter visitors to the Highlands were visiting alone, although this varied considerably from 16% travelling alone to Lochaber down to only 3% in Badenoch and Strathspey. In total, around half of the visitors were with one other person (52%), whilst just under three in ten had four or

more people in their party (28%). The average party size amongst winter visitors was **2.90 people**, a slightly higher proportion than in the Highlands as a whole between March and November 1997 (2.76 people). Average party sizes in Badenoch and Strathspey were significantly higher than those in Lochaber (3.23 and 2.58 people respectively);

- Given the very seasonal nature of overseas tourism to Scotland, it is not surprising to discover that the overwhelming majority of visitors to Lochaber and Badenoch and Strathspey during the winter were from the United Kingdom (86%). The largest proportion of UK visitors were Scots (45%), with just under four in ten from England (39%). The greater importance of these home markets at this time of the year is evident when compared with the profile of visitors to the Highlands as a whole during the 1997 March-November period. Then, over a quarter of visitors were from overseas (27%), and fewer than one in three were from Scotland (32%);
- A wide range of reasons were provided by respondents for their trip to the Highlands. Skiing was mentioned by the largest proportion of respondents (18%) as a reason to visit, although it was closely followed by a short break (14%) and the scenery (14%);
- As in the March-November 1997 survey, two key factors emerged amongst visitors which influenced their trip to the Highlands: a previous visit(s) to the area (51%), and advice from friends or relatives (30%). In the Badenoch and Strathspey area, the first of these reasons was paramount: three in five described a previous visit as their main influence (60%), reflecting the higher proportion of visitors on a repeat visit to the area than is the case for Lochaber;
- In total, only around 8% of those interviewed during the winter months had been influenced to visit by tourist brochures, rather less than the 15% who had been influenced by brochures in their decision to visit the Highlands during the March to November period in 1997;
- Typically, tourists visiting the Lochaber area in the winter were staying rather longer in Scotland than their counterparts in Badenoch and Strathspey (8.5 nights and 5.5 nights respectively). Conversely, Lochaber visitors were staying for a shorter duration in both the Highlands (4.4 nights) and in Lochaber (3.6 nights) than Badenoch and Strathspey visitors (4.9 nights and 4.7 nights respectively);

- Just over a quarter of winter visitors were on their first ever visit to the Highlands (27%), a significantly lower proportion than the average for the Highlands as a whole between March and November 1997 (35%). This illustrates the significantly higher proportions of repeat visitors attracted in the off-peak season, and reflects the higher proportions of Scots visitors and the correspondingly lower proportions of overseas visitors;
- Almost three quarters of winter visitors to the Highlands used their own car on their journey to the area (72%), the same percentage as was apparent in the March-November 1997 survey for the Highlands as a whole (72%). Only four other means of transport were mentioned by 5% or more visitors as their main means of getting to the Highlands: 8% travelled by train, 7% by hire car, 6% were on a coach tour, whilst 5% arrived on a public bus service;
- Hotels were the most popular form of accommodation used by winter visitors accounting for around four trips in every ten at that time of the year (39%). Bed and breakfast establishments were next most popular, with around one in every five winter visitors staying in this type of accommodation during their visit to the area (20%). Other than self-catering accommodation (12%), no other forms of accommodation were used by more than 9% of the winter visitors to the Highlands;
- As many as seven in every ten visitors to both Lochaber (70%) and Badenoch and Strathspey (69%) were taking part in some sporting/outdoor activities during their winter trip to the Highlands, a significantly higher proportion than the averages for the Highlands as a whole in the main March-November period (56%). This suggests that a greater proportion of winter holiday visitors to the Highlands were on a sporting or activity holiday than those visiting at other times of the year. As in the main season survey, a higher proportion of visitors to the area during the winter period were undertaking non-sporting activities during their visit: 91% of visitors to Lochaber and 92% of visitors to Badenoch and Strathspey were undertaking some forms of non-sporting activities during their winter visit;
- Overall, some 18% of visitors to the Highlands during the winter period were skiing during their trip. Three in five had booked and arranged their trip some time in advance in the hope and anticipation for good conditions (60%). Only around one in every five (19%) waited until the last moment

for suitable conditions before making arrangements to visit. Cairngorm (58%) and Nevis Range (42%) represented the two most popular ski areas;

- In Badenoch and Strathspey, around seven in every ten visitors to the area visited at least one attraction on their trip (70%). Two attractions were visited by more than one in five of them: Landmark in Carrbridge (22%) and Loch Morlich (21%). On the other hand, almost three-quarters of visitors to Lochaber had not visited any of the area's built attractions during their trip (73%). The West Highland Museum in Fort William was the most visited attraction, but even here, only one visitor in every nine to the area visited (11%);
- In total, just over half of the visitors had either already visited or intended to visit a TIC on their trip (55%), a lower proportion than that recorded in the Highlands as a whole during the 1997 main season;
- As in the main season survey conducted in 1997, three facilities were used by over half of those respondents who had visited Aviemore: shops - for convenience shopping (52%), shops - for gifts etc (63%) and restaurants, cafes and carry out food establishments (54%);
- Whereas the majority of those interviewed during the main season in 1997 had visited Aviemore on a day trip (66%), during the January-March 1998 period, the largest proportion of those interviewed were staying overnight in the village (58%). Most commonly, they were staying for one or two nights (28%), although one in five were staying in Aviemore for five nights or longer (20%). Amongst day trippers, the most common length of stay in the village was between two and four hours, with 23% of visitors staying for that length of time;
- Amongst visitors to Aviemore, in both the 1997 main season survey and the 1998 winter survey, three proposed developments emerged as being of greatest importance and received most votes in terms of popularity: the creation of a traffic-free or traffic-calmed centre (30% in the winter survey, 33% in the main season survey), high quality buildings and landscaping using natural materials (33% and 34% respectively), and improvements to the swimming pool and ice rink complex (32% each time)..
- Evidently the majority of respondents knew at best very little about Lochaber prior to their current visit: 36% of winter visitors claimed to have known either nothing or not very much, whilst a further 37% only knew “a

little". This suggests that the potential which exists for the tourist industry in Lochaber and the area tourist board to raise the profile of the area through further promotion;

- Whereas during the main season survey, almost four visitors in every ten to the area described their visit to Lochaber as having been better than expected (37%), only 15% described their winter visit in such terms. Three in five (58%) felt it had been much as they had expected (51%), and 15% had not known what to expect, however a relatively large proportion described their winter visit as having been worse than expected (12%), thus indicating lower degrees of satisfaction than had been evident in the main 1997 survey;
- Typically, respondents interviewed between January and March 1998 in Badenoch and Strathspey and Lochaber spent £74 per day during their trip to the Highlands on themselves and others in their party, a significantly smaller amount to the average spent in the Highlands as a whole during the 1997 main season (£92). This averaged out at an average spend of £37 per person per day, £6 per person per night less than during the main season;
- Typically, winter visitors to the two areas spent around £350 during their trip to the Highlands on themselves and others in their party. This averaged out at an average spend of around £174 per person on their trip to the area. Given that the average length of stay in the Highlands during the 1997 main season was 7 nights, and the per night expenditure was higher, it is not surprising that main season per trip spending was considerably higher (£301 per person).

## A. Background and Methods

### Background

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

**Highlands and Islands Enterprise (HIE)** is responsible for both business development and tourism skills in the area, whilst the responsibility for marketing lies within the remit of 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. In addition, further survey work was undertaken during January, February and March 1998 in Badenoch and Strathspey and in Lochaber to measure visitor characteristics during this key winter period for these areas.

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.

Reports have been produced to cover each area of the Highlands where interviewing took place during the main season in 1997 (Caithness, Sutherland, Ross and Cromarty, Inverness, Loch Ness and Nairn, Isle of Skye and Lochalsh, Moray, Badenoch and Strathspey 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 during that period.

This report provides a separate analysis of the characteristics of visitors to Badenoch and Strathspey and Lochaber during the main **winter season** of 1998 (during January-March).

### **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 during the study period was a programme of **face-to-face interviews** with a representative sample of visitors to the Badenoch and Strathspey and Lochaber areas.

The efficacy of this methodology for visitor surveys is dependent on the careful selection of the **interview locations**. It was vital that the choice of sites reflected those locations in the area most likely to be visited by visitors, particularly outwith the main summer season. 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 411 interviews were undertaken throughout January, February and March 1998. The interviews were split fairly evenly across the two areas: 206 interviews were undertaken in Lochaber and 205 in Badenoch and Strathspey. A much more limited number of interview sites were used compared to those used in the main summer period, and they are indicated below in Table A-1.

**Table A-1 - Interview locations: Badenoch and Strathspey and Lochaber**

Base: 411 interviews with visitors

	Interviews undertaken
<b>Badenoch &amp; Strathspey:</b>	
Aviemore - village	175
Landmark Visitor Centre, Carrbridge	14
Rothiemurchus Estate	16
<b>Lochaber:</b>	
Fort William town centre	206
<b>Total:</b>	<b>411</b>

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

- each offered a position which would intercept visitors as they leave a location and which would cause the minimum disruption to the throughput of visitors to the location

- where possible, there was a position which afforded the opportunity for the interviewer and respondent to sit down for the duration of the interview, and if possible, a position which provided some protection from the weather.

In those interviews undertaken in both Aviemore and Fort William, intercepting visitors as they passed a specified point replaced the requirement to make contact as they leave an interview location. Respondents were selected on the basis of the **next person to leave**, or pass the interviewer on completion of the previous interview. Such an approach ensures the random selection of respondents whilst maximising the interviewer resource. In those situations where a family or group of people passed the interviewer together, the "**next birthday**" rule was applied to maintain this random selection procedure as it would be inappropriate for the oldest member of the party to always assume responsibility for the conduct of the interview.

The sample of **411 completed interviews** in the area represents a large and suitably robust sample for analysis of the characteristics of visits made to the two areas during the winter season of 1998: in total, at the 95% levels of confidence, results are accurate to plus or minus 4.8%, whilst results for each area are accurate to within plus or minus 6.8%.

The interviews were conducted throughout the January-March period, taking account of the following factors:

- given the time of the year, survey days were concentrated around the weekend periods;
- 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: 411 interviews with winter visitors

	<b>Interviews undertaken</b>		<b>Interviews undertaken</b>
Monday	26	January	15
Friday	27	February	42
Saturday	27	March	43
Sunday	20	<b>Total</b>	<b>100</b>
<b>Total</b>	<b>100</b>		

An interpretation and analysis of the full results and findings to emerge from the interviews follows in Section B. A slightly different version of the questionnaire was used during the winter season compared with the 1997 main season surveys. This was designed to reflect the different characteristics of visitors and the tourism product at that time of the year. Where appropriate however, comparisons have been made between the results for the winter season with the overall findings for the Highlands as a whole during 1997.

## B. Main Findings

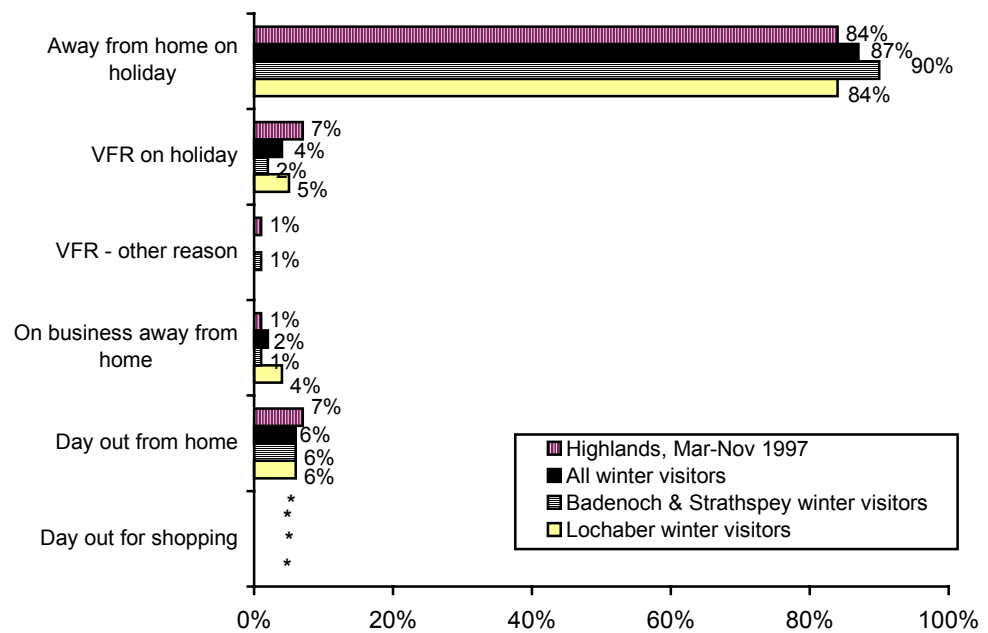
### Reasons for Visiting

#### *Purpose of Visit*

The profile of trip types taken to Lochaber and Badenoch and Strathspey during the winter in 1998, together with the comparable figures for the Highlands during the main season of 1997, are summarised in Figure B-1 below:

**Figure B-1 - Purpose of Visit**

Base: 206 winter visitors to Lochaber  
 205 winter visitors to Badenoch and Strathspey  
 3,301 visitors to the Highlands, March-November 1997



\* - less than 0.5%

The majority of winter visitors to both Badenoch and Strathspey and Lochaber were staying away from home overnight (90% and 84% respectively, and a winter average of 87%) - a slightly higher proportion to that recorded in the Highlands as a whole during the 1997 March-November period (84%). Only 6% of winter visitors interviewed were on a day trip from home, a similar proportion to the March-November period (7%). Visiting friends and relatives

was rather less common during the winter period (4%) than between March and November (7%).

There were some winter variations in these proportions between Lochaber and Badenoch and Strathspey, with visitors to the former area rather more likely to be on holiday. There were some further minor variations in the purpose of trip profile obtained during the winter period amongst the different market segments:

- Slightly higher proportions of C2DEs visiting the areas were day-trippers (8%) than amongst ABC1s (5%). Conversely, ABC1s were rather more likely to be on holiday (88%) than C2DEs (85%);
- visitors in the area at weekends were rather more likely to be day trippers (8%) than those visiting during the week (5%);
- first time visitors to the Highlands were rather more likely to be on holiday (92%) than those on a repeat trip (87%).

*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: 193 staying visitors to Lochaber  
193 staying winter visitors to Badenoch and Strathspey  
3,080 staying visitors to the Highlands, March-November 1997

	<b>Lochaber winter visitors</b>	<b>Badenoch Strathspey winter visitors</b>	<b>All winter visitors</b>	<b>Overnight visitors to Highlands</b>
- Staying in one main location in the Highlands and taking day trips from there	69	93	81	53
- Staying in 2 or 3 locations during visit to the Highlands	23	5	14	29
- Touring around the Highlands, staying in more than 3 locations	8	1	4	17
- Other	*	*	*	*
<b>Total:</b>	<b>224</b>	<b>484</b>	<b>708</b>	<b>100</b>

Note: \* - less than 0.5%

Four in five winter trips to Lochaber and Badenoch and Strathspey were not touring in nature (81%), a significantly higher proportion than the average for the Highlands as a whole during the March to November period (53%). Only 4% of winter visits were truly “touring” in nature, considerably lower than the main season average for the Highlands (17%). Whilst much of this difference is a reflection of the time of year, it should also be borne in mind that both of these areas receive a high proportion of one-centre visitors during the main season as well. For example, 77% of March to November visits made to Badenoch and Strathspey were by those on a one-centre holiday to the area.

Badenoch and Strathspey is generally more of a one-centre location than Lochaber – over 9 in 10 winter visitors were staying there only, as opposed to 69% of Lochaber visitors. This undoubtedly reflects the attraction of Aviemore and the Spey Valley for one-centre holidays.

As would be expected, there were some variations in the types of trips taken by different market segments during the winter period:

- *Age:* younger visitors were rather more likely to be on a touring holiday than older visitors. Some 25% of those aged under 35 years were staying in two or more locations, compared to 13% of those aged 55+ years;
- *Accommodation:* those winter visitors staying in self-catering accommodation (95%) or in hotels and guesthouses (80%) were much more likely to be staying in only one location whereas those staying in bed and breakfast establishments were rather more likely to be on touring holidays (49%);
- *Origin:* almost nine in ten Scots visitors (86%), and over four in five visitors from other parts of the UK (83%) were staying in only one location in the Highlands compared with just over half of overseas visitors (51%);
- *Previous visits:* those on their first ever trip to the Highlands were more likely to be touring (30%), than those who had visited before (17%);
- *Length of Stay:* those staying in the Highlands for three nights or less were rather more likely to be staying in only one location (83%), than those who were in the Highlands for longer than this (75%).

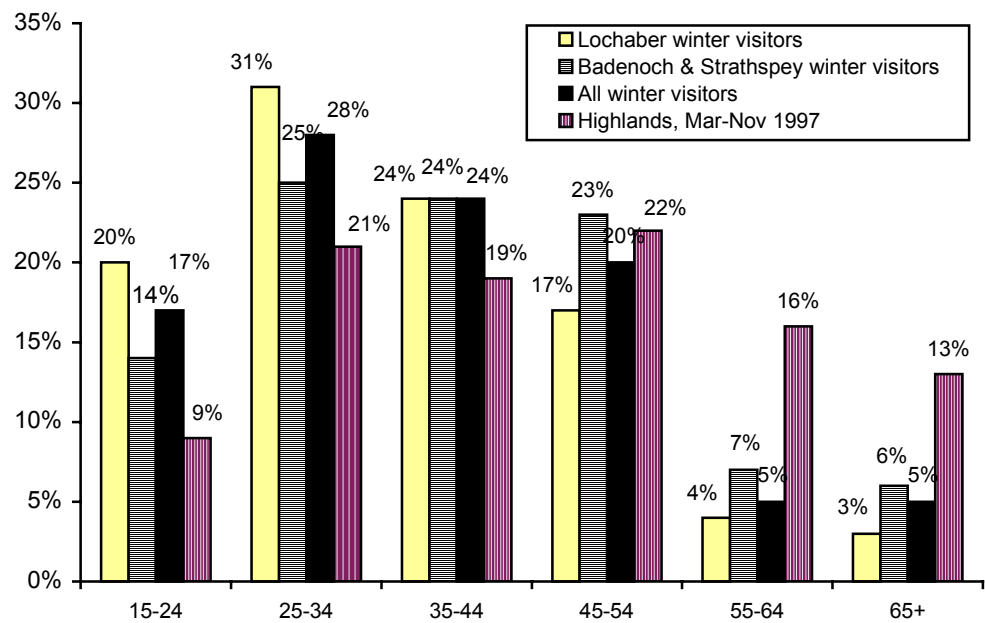
### Visitor Profile

#### Age

The age groups of winter visitors to the Badenoch and Strathspey and Lochaber areas are indicated in Figure B-2 below:

**Figure B-2 - Age of Visitors**

Base: 206 winter visitors to Lochaber  
 205 winter visitors to Badenoch and Strathspey  
 3,301 visitors to the Highlands, March-November 1997



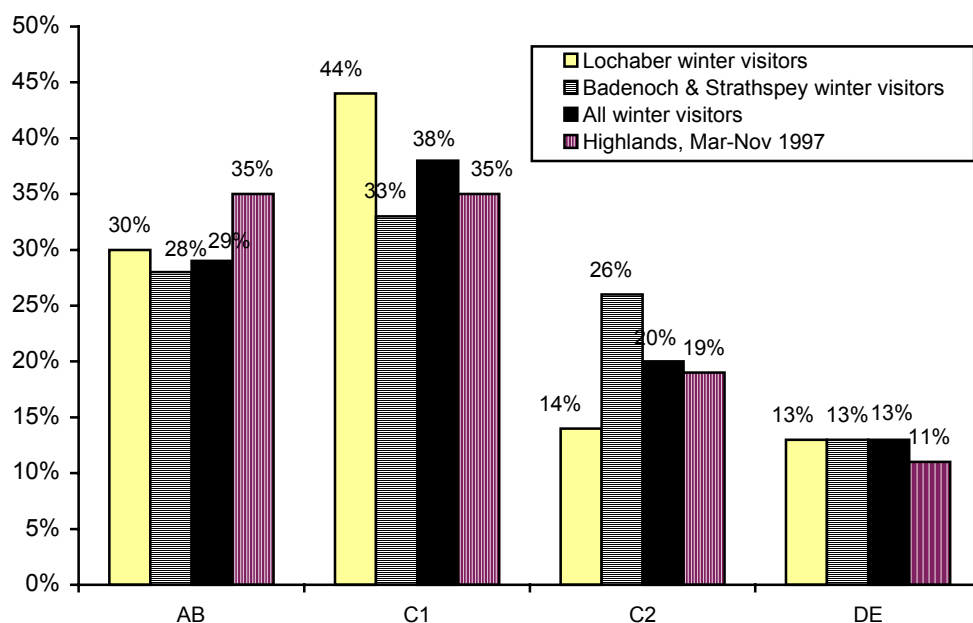
The age profile of winter visitors to both Badenoch and Strathspey and Lochaber is significantly younger than the main season age profile. Over two thirds of winter visitors (69%) were aged under 45 years compared with just under half of main season visitors to the Highlands (49%). Winter visitors to Lochaber were younger than their counterparts in Badenoch and Strathspey (75% and 63% respectively were aged under 45 years). Only 10% of those interviewed during the winter months were aged 55 years or over, compared with 29% of those interviewed during the March-November period in 1997.

As would be expected, there were some variations in the age profiles amongst different types of winter visitors:

- *Social Class:* C2DEs visiting during the winter were rather more likely to be older visitors than ABC1s: 14% were aged 55 and over compared with 8% of ABC1s;
- *Accommodation:* visitors staying in bed and breakfast establishments tended to be younger than those staying in hotels (56% and 36% respectively, were aged under 35);
- *Origin:* overseas visitors tended to be significantly younger than their UK counterparts: almost two thirds of those from overseas visiting during the winter were aged under 35 years (64%) compared with around 38% of visitors from Scotland and 45% of those from other parts of the UK;
- *Length of Stay:* younger visitors were more likely to be on a short stay: half of those staying for 1-3 nights were aged under 35 (50%), compared with 35% of those who stayed for between four and seven nights;
- *Previous visits:* those on a repeat visit to the Highlands were more likely to be older than those visiting for the first time (35% and 23% respectively were aged over 45 years).

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

Base: 206 winter visitors to Lochaber  
 205 winter visitors to Badenoch and Strathspey  
 3,301 visitors to the Highlands, March-November 1997



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

As with visitors to the Highlands during the main season, those visiting Lochaber and Badenoch and Strathspey during the winter were fairly upmarket in their profile: around two thirds of winter visitors were ABC1s (67%). There is evidence however that those interviewed during the winter were slightly less upmarket than those interviewed during the main season: 29% of the former were ABs compared to 35% of the latter group. Visitors to Lochaber were rather more likely to be ABC1s than those visiting Badenoch and Strathspey however (74% and 61% respectively).

Those categories of winter visitors **more likely to be ABC1s** included:

- those staying in bed and breakfasts (81%), and visitors from overseas (83%);

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

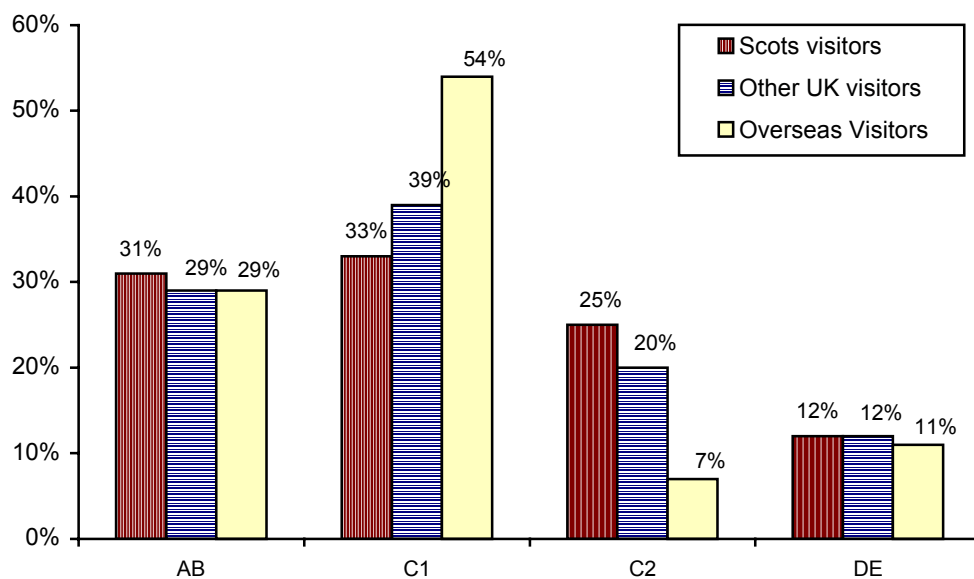
- Scots visitors (37%), those on a first time visit (36%), and those staying in self-catering accommodation (35%).

The variation in the social class profile of winter visitors to the area was very marked, with overseas visitors to the area considerably more likely to be

ABC1s than Scots residents or visitors from other parts of Scotland or the UK. In particular, they were more likely to be C1s (54%). This is summarised in Figure B-4 below:

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

Base: 411 winter visitors to Lochaber and Badenoch & Strathspey



#### *Party size and composition*

Only 9% of winter visitors to the Highlands were visiting alone, although this varied considerably from 16% travelling alone to Lochaber down to only 3% in Badenoch and Strathspey. In total, around half of the visitors were with one other person (52%), whilst just under three in ten had four or more people in their party (28%). The average party size amongst winter visitors was **2.90 people**, a slightly higher proportion than in the Highlands as a whole between March and November 1997 (2.76 people). Average party sizes in Badenoch and Strathspey were significantly higher than those in Lochaber (3.23 and 2.58 people respectively).

Largest party sizes were amongst visitors who were staying in self-catering accommodation (3.91 people), whilst those aged 35-44 years also had larger than average party sizes (3.21 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 (2.80 and 2.41 people respectively). There were also some variations by region of origin: visitors from other parts of the UK were in larger party sizes (3.17 people) than Scots (2.76) and overseas visitors (2.64). The composition of these groups is illustrated below:

**Table B-2 - Party Composition (%)**

Base: 206 winter visitors to Lochaber  
205 winter visitors to Badenoch and Strathspey  
3,301 visitors to the Highlands, March-November 1997

	<b>Lochaber winter visitors</b>	<b>Badenoch Strathspey winter visitors</b>	<b>All winter visitors</b>	<b>Highlands, Mar-Nov 1997</b>
<b>Adults, no children under 18 years</b>	<b>88</b>	<b>70</b>	<b>79</b>	<b>79</b>
- one adult, no children under 18 years	16	3	9	7
- two adults, no children under 18 years	55	47	51	56
- more than two adults, no children under 18 years	17	20	18	16
<b>Adults with children under 18 years</b>	<b>12</b>	<b>30</b>	<b>21</b>	<b>21</b>
<b>Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

The larger average party size in the Badenoch and Strathspey Enterprise area compared to Lochaber, would appear to be a reflection of the significantly larger proportion of winter visitors who had children with them (30%, compared with 12% in Lochaber). Despite that, in both areas, the most common party composition consisted of two adults and no children (47% of respondents in Badenoch and Strathspey and 55% of Lochaber respondents).

As would be expected, a larger proportion of those aged 35-54 years had children with them (32%) than amongst those aged under 35 (12%) and those aged 55+ years (10%). Others more likely to have children with them included those on a centred holiday (24%), and visitors who were self-catering (42%). Also, visitors to the area from Scotland and from elsewhere in the UK were rather more likely to have children present (25% and 23% respectively), than those from overseas (2%). Those on repeat visits were also rather more likely to have children present (25%) than first time visitors (13%).

*Origin of Visitors*

The origin of winter visitors to the Lochaber and Badenoch and Strathspey is indicated in Table B-3 below:

**Table B-3 - Origin of Visitors (%)**

Base: 206 winter visitors to Lochaber  
205 winter visitors to Badenoch and Strathspey  
3,301 visitors to the Highlands, March-November 1997

	Lochaber winter visitors	Badenoch & Strathspey winter visitors	All winter visitors	Highlands, Mar-Nov 1997
<b>Scotland</b>	<b>31</b>	<b>60</b>	<b>45</b>	<b>32</b>
- Glasgow/Clyde Valley	11	20	15	7
- Edinburgh/Lothian	8	8	8	5
- Aberdeen/Grampian	1	9	5	6
- Tayside	2	7	5	2
- Fife	3	6	5	2
- Other Scotland	6	10	7	10
<b>England</b>	<b>44</b>	<b>34</b>	<b>39</b>	<b>39</b>
- South East	15	8	12	13
- North	9	6	8	9
- North West	6	10	8	6
- Midlands	8	8	8	7
- South West	5	2	3	3
<b>Other UK</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>
<b>Overseas</b>	<b>23</b>	<b>4</b>	<b>14</b>	<b>27</b>
- Australia	7	*	4	3
- Canada	3	*	2	2
- Germany	3	*	2	5
- USA	2	*	1	5
- Other overseas	8	1	5	12
<b>Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

Note: \* - less than 0.5%

Given the very seasonal nature of overseas tourism to Scotland, it is not surprising to discover that the overwhelming majority of visitors to Lochaber and Badenoch and Strathspey during the winter were from the United Kingdom (86%). The largest proportion of UK visitors were Scots (45%), with just under four in ten from England (39%). The greater importance of these home markets at this time of the year is evident when compared with the profile of visitors to the Highlands as a whole during the 1997 March-November period. Then, over a quarter of visitors were from overseas (27%), and fewer than one in three were from Scotland (32%).

There are also some major differences in the profile of winter visitors between the Badenoch and Strathspey area and the Lochaber area, with some clear evidence that the winter months still provide a lucrative overseas market to Lochaber. Three in five visitors to Badenoch and Strathspey during the 1998 winter period were Scots (60%) compared with only 31% of Lochaber visitors. Conversely, whilst almost a quarter of Lochaber visitors were from overseas (23%), the corresponding proportion in Badenoch and Strathspey was only 4%.

Amongst English visitors, the main population centre of the South East of England was the biggest regional market for the Lochaber area (15%) whilst the North West was most important to Badenoch and Strathspey (10%). Amongst Scots, the Glasgow and Clyde Valley area was the biggest generator of winter visitors for both areas (20% of Badenoch visitors and 11% of Lochaber visitors), whilst Edinburgh and the Lothians accounted for 8% of visitors in each area. Aberdeen and Grampian was an important generator of visitors to Badenoch and Strathspey (9%), although only 1% of Lochaber visitors were from there. In terms of overseas markets, unlike during the March to November period, Australia accounted for the largest proportion of overseas visitors (4%), undoubtedly a reflection of this being the main season for Australian summer holidays. The limited travel by US residents outwith the main season is evidenced by the fact that only 2% of winter visitors were from there.

By concentrating primarily on overnight holiday visitors to the area, it is possible to compare the profile of winter visitors to the two areas with the typical 12-month 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 winter holiday visitors were as follows:

- Scots holiday visitors: 43%
- English holiday visitors: 41%
- Other UK holiday visitors: 2%
- Overseas holiday visitors: 14%

It must be borne in mind that this is not a comparison of like with like as the winter survey covered a three-month period of the year as opposed to the full-year coverage of IPS and UKTS. It is interesting to note the similarities

however, with a relatively low dependence on the overseas markets compared with the picture for the Highlands as a whole between March and November when a much higher proportion of visitors were from overseas (27%).

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 respondents are outlined in Table B-4 below:

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

Base: 206 winter visitors to Lochaber

205 winter visitors to Badenoch and Strathspey

	Lochaber winter visitors	Badenoch & Strathspey winter visitors	All winter visitors
Skiing/snowboarding	13	24	18
Short/weekend break	10	18	14
Scenery/beautiful place	16	12	14
Wanted to come/never been	16	8	12
Been before	8	14	11
To see/visit a specific place	16	4	10
Family/friends visit	9	8	9
Mountains and hills/landscape	14	2	8
Special deals/accommodation available	3	12	8
Walking/hill walking	12	3	7
Peace and quiet/uncrowded	7	6	7
Showing people around	7	7	7
Like the area	5	7	6
Weather – there was no snow	2	9	6
General sightseeing	10	*	5
<b>Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>

\* - less than 0.5%

Respondents provided a wide range of reasons for their trip to the Highlands. Skiing was mentioned by the largest proportion of respondents (18%) as a reason to visit, although it was closely followed by a short break (14%) and the scenery (14%).

There were some major variations in the reasons for visiting between the two areas. The attraction of skiing and snowboarding was particularly important in Badenoch and Strathspey (24%), whereas it would appear that visitors to Lochaber had been attracted by a wider range of factors. For example, the scenery (16%), specific places (16%), the mountains and hills (14%) and

walking and hill walking (12%) were all significantly more important reasons for visiting amongst Lochaber visitors. Larger proportions of Badenoch and Strathspey visitors had been attracted by special deals or the availability of accommodation - time share, and rented (12%) or were visiting on weekend or short breaks (18%).

Generally, the reasons provided for visiting amongst winter visitors are rather different than those given during the main season survey when the following emerged as the main reasons for visiting:

- Scenery/scenic views/beauty/unspoilt 22%
- Been before/knew area 18%
- Never been/always wanted to come 14%
- General sightseeing 13%
- Peace and quiet/tranquillity 13%
- Like area/enjoy it 12%
- Family/friends in the area 12%
- Mountains and hills/landscape 12%

Clearly, rather less important during the winter season is the scenery and general sightseeing.

The importance of the three main reasons for visiting varied across the key market segments:

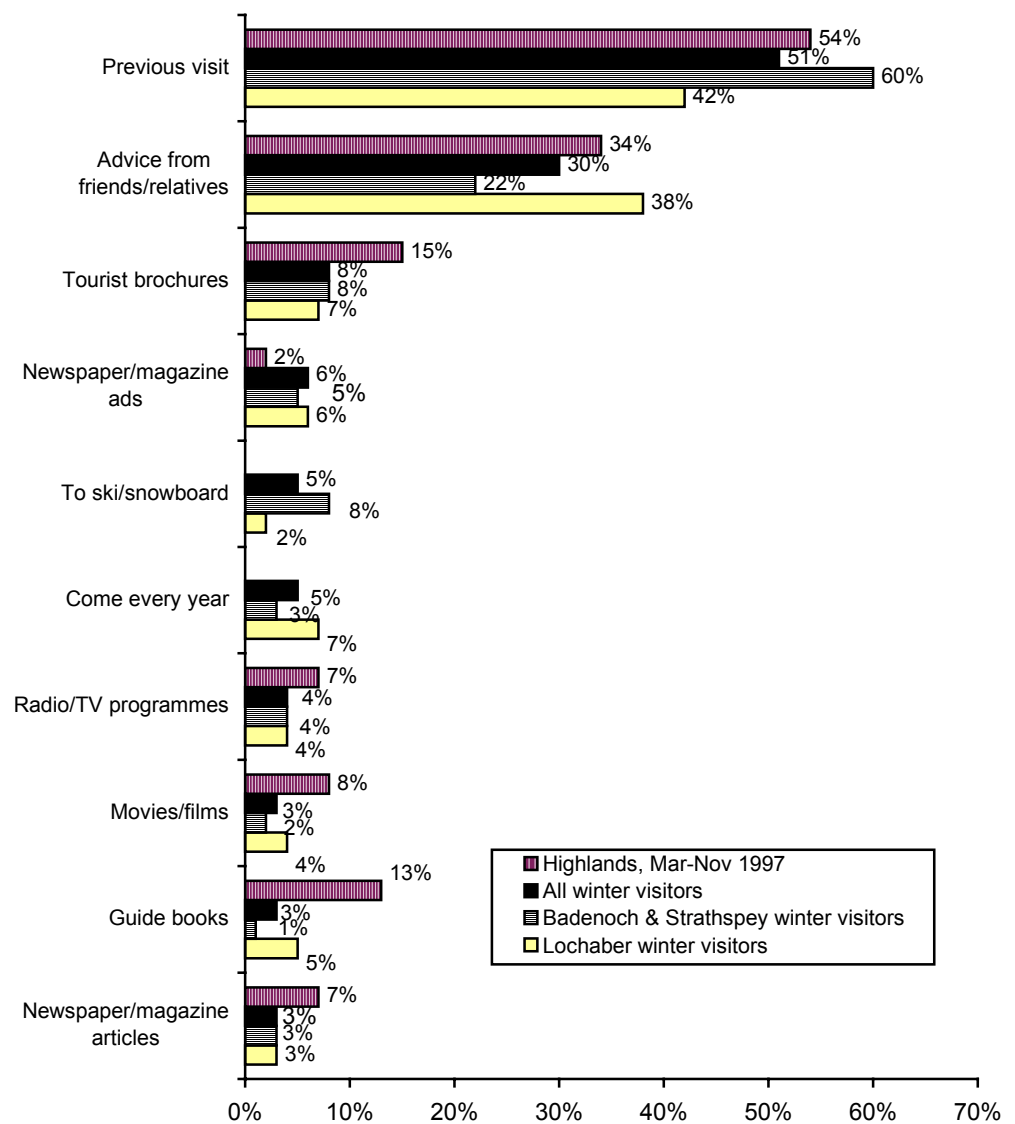
- *Skiing/snowboarding (18% overall)*: more important in Badenoch and Strathspey (24%) than in Lochaber (13%); more important amongst those aged under 35 years (22%) than amongst those aged 35-54 (16%) or 55+ (12%); more important amongst ABC1s (20%) than C2DEs (15%); more important amongst those staying for four or more nights (23%) than those staying for 1-3 nights (16%); and more important amongst visitors from England and Wales (25%) than amongst Scots (16%) or overseas visitors (11%);
- *Short/weekend breaks (14% overall)*: more important amongst Scots (26%) than those from elsewhere in the UK (5%) or from overseas (2%); more of an attraction amongst those on a repeat visit to the Highlands (17%) than amongst first time visitors (6%); more important amongst those staying in hotels (22%) than amongst those staying in other forms of accommodation (10%); and more important amongst visitors to Badenoch and Strathspey (18%) than amongst those visiting Lochaber (10%);
- *Scenery/beautiful place (14% overall)*: more important amongst visitors to Lochaber (16%) than those visiting Badenoch and Strathspey (12%); and a particular attraction for overseas visitors (29%).

*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. Those mentioned by 3% or more respondents are illustrated in Figure B-5 below:

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

Base: 206 winter visitors to Lochaber  
 205 winter visitors to Badenoch and Strathspey  
 3,301 visitors to the Highlands, March-November 1997



As in the March-November 1997 survey, two key influences emerged amongst visitors: a previous visit(s) to the area (51%), and advice from friends or

relatives (30%). In the Badenoch and Strathspey area, the first of these reasons was paramount: three in five described a previous visit as their main influence (60%), reflecting the higher proportion of visitors on a repeat visit to the area than is the case for Lochaber. 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 8% of winter visitors, “informal” information sources were more important influencing factors than “formal” sources. Only 8% mentioned tourist brochures and guidebooks, whilst newspaper advertisements were mentioned by only 6% of respondents. Advice from friends and relatives was particularly important in Lochaber: almost four in every ten visitors (38%) described it as having influenced their trip.

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	- 64%
Advice - friends/relatives	- 20%
Newspaper/magazine ads	- 7%
Tourist brochures	- 5%
To ski/snowboard	- 4%

***Other UK visitors:***

Previous visit	- 49%
Advice - friends/relatives	- 31%
Come every year	- 10%
Tourist brochure	- 9%
To ski/snowboard	- 9%

***Overseas visitors:***

Advice - friends/relatives	- 63%
Previous visit	- 20%
Movies/films	- 16%
Guide book	- 14%
Tourist brochures	- 13%

Clearly, amongst Scots visiting the Badenoch and Strathspey and Lochaber areas during the winter, 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 (although 10% “came every year”), 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 roles played by movies and films and guidebooks are clear: 16% and 14% respectively had been influenced to visit by these factors.

#### *Use of tourist brochures*

In total, only around 8% of those interviewed during the winter months had been influenced to visit by tourist brochures, rather less than the 15% who had been influenced by brochures in their decision to visit the Highlands during the March to November period in 1997. Tourist brochures were also more influential in some of the winter markets than others: 10% of those aged under 35 years had been influenced by brochures, compared with only 2% of those aged over 55; 13% of overseas visitors had been influenced by brochures compared with only 5% of Scots and 9% of those from elsewhere in the UK; whilst brochures had influenced 14% of those on their first visit to the Highlands compared with only 5% of repeat visitors.

These respondents were then shown the front covers of several tourist brochures and asked whether any of them had influenced their visit:

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

Base: 31 winter respondents, influenced by brochure(s)

507 respondents in the Highlands, March-November 1997, influenced by brochure(s)

	All winter visitors	Highlands, Mar-Nov 1997
Ski Scotland brochure	29	N/A
Freedom of the Highlands (HOST)	10	32
Scotland - Main UK Guide (STB)	6	31
Scotland - Overseas Guide (STB)	19	31
6 Local Accommodation/ Visitor Guides (HOST)	3	14
None of these	52	39
<b>Total:</b>	<b>100</b>	<b>100</b>

Care should be taken when interpreting the results because of the very small base (N=31). Levels of recognition were highest for the Ski Scotland brochure: 29% of those who had been influenced by brochures recognised it. STB's overseas guide was recognised by 19% of respondents. As many as 43% 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 Badenoch and Strathspey or Lochaber areas:

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

Base: 193 staying visitors to Lochaber

193 staying winter visitors to Badenoch and Strathspey

	Lochaber winter visitors			Badenoch & Strathspey winter visitors		
	In Scotland	In the Highlands	In Lochaber	In Scotland	In the Highlands	In Bad/Strath
None	-	10	13	-	3	2
One	5	7	14	5	7	8
Two	16	21	27	30	30	32
Three	14	17	13	13	12	12
Four	14	12	8	10	10	9
Five	7	5	2	6	6	5
Six	4	4	3	7	6	7
Seven	20	13	12	18	18	17
Eight - Thirteen	9	6	6	5	5	4
Fourteen	3	2	2	4	3	3
Fifteen or more	8	3	1	2	1	1
<b>Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Average (winter survey)</b>	<b>8.5 nights</b>	<b>4.4 nights</b>	<b>3.6 nights</b>	<b>5.5 nights</b>	<b>4.9 nights</b>	<b>4.7 nights</b>
<i>Average (Mar-Nov '97)</i>	<i>10.7 nights</i>	<i>6.9 nights</i>	<i>4.9 nights</i>	<i>8.7 nights</i>	<i>6.7 nights</i>	<i>4.5 nights</i>

Typically, tourists visiting the Lochaber area in the winter were staying rather longer in Scotland than their counterparts in Badenoch and Strathspey (8.5 nights and 5.5 nights respectively). Conversely, Lochaber visitors were staying for a shorter duration in both the Highlands (4.4 nights) and in Lochaber (3.6 nights) than Badenoch and Strathspey visitors (4.9 nights and 4.7 nights respectively). This suggests that whereas Lochaber winter visitors clearly had an element of touring on their visit, for the most Badenoch and Strathspey visitors, almost all of their time in Scotland was spent in the local area.

In each case, the length of stay in both Scotland and the Highlands were typically two or three nights shorter than in March and November 1997. However, whilst Lochaber winter visitors stayed locally for around 1-2 nights less than those visiting during the main season, there was little difference in the local stay duration amongst visitors to Badenoch and Strathspey in either winter or during the main season.

There were some key variations in the length of stay in the local 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 was 4.5 nights. The comparable length of stay for those under 35 years was 3.8 nights;
- ABC1s stayed slightly longer in the local area (4.2 nights) than ABC1s (3.9 nights);
- Visitors who were staying in self-catering accommodation stayed considerably longer in the local area (6.3 nights) than those in bed and breakfasts or hotels (2.8 nights and 2.7 nights respectively);
- Length of stay in the local area varied significantly by origin: Scots visitors stayed for the shortest time (2.9 nights), compared with a longer length of stay amongst visitors from overseas (4.1 nights) and other parts of the UK (5.4 nights).

### Previous Visits

#### *Previous visits to the Highlands*

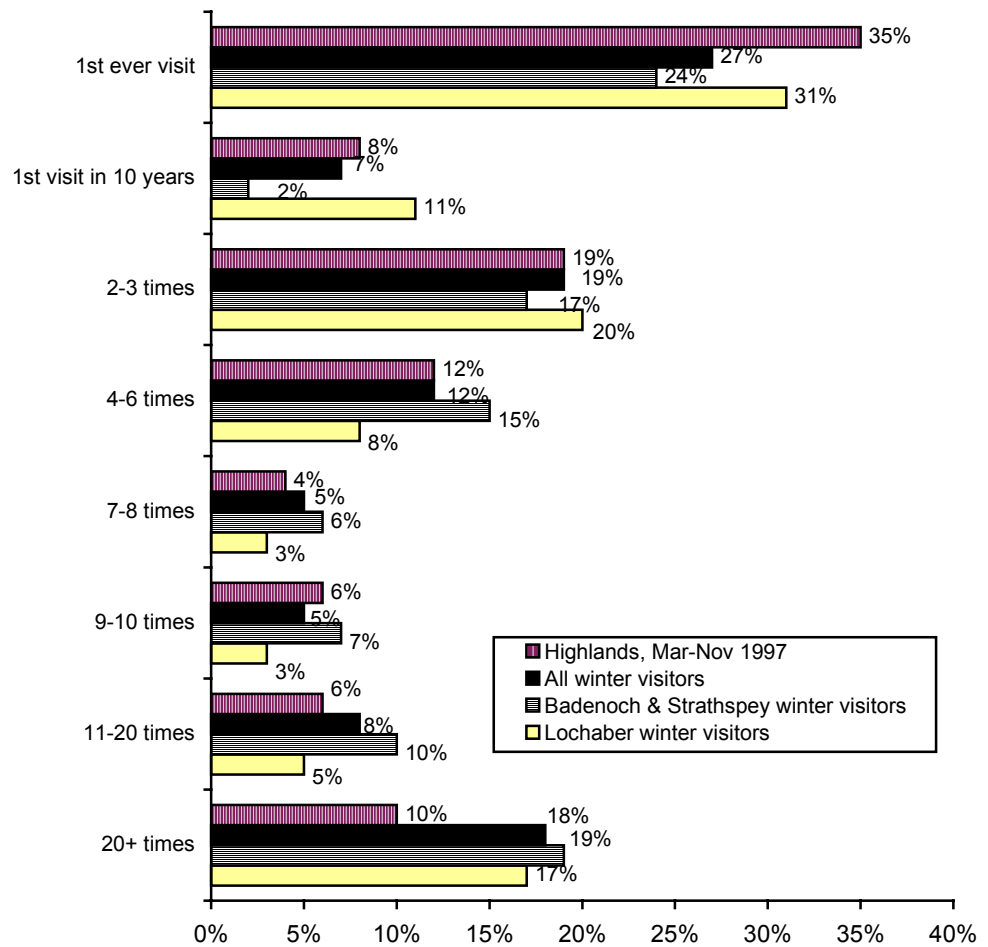
Respondents' previous experience of the Scottish Highlands is indicated in Figure B-6 below:

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

Base: 202 non-Highland residents in Lochaber (winter survey)

195 non-Highland residents in Badenoch & Strathspey (winter survey)

3,120 non-Highland residents in the Highlands (March-November 1997)



Just over a quarter of winter visitors were on their first ever visit to the Highlands (27%), a significantly lower proportion than the average for the Highlands as a whole between March and November 1997 (35%). This illustrates the significantly higher proportions of repeat visitors attracted in the off-peak season, and reflects the higher proportions of Scots visitors and the correspondingly lower proportions of overseas visitors.

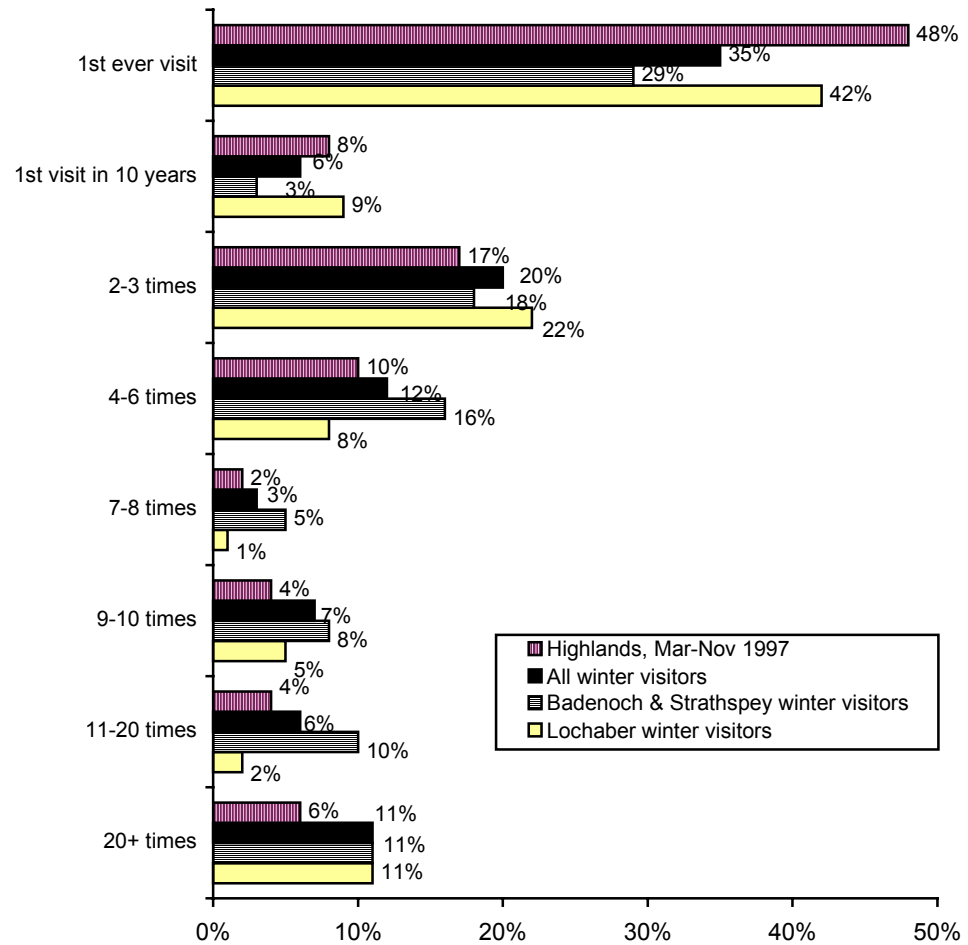
Visitors to Badenoch and Strathspey were particularly likely to have been to the Highlands before: 76% had been before, compared with 69% of visitors to Lochaber. They were also more likely to have visited on more occasions: on average, Badenoch and Strathspey respondents had visited the Highlands 9.0 times before, compared with 7.1 times amongst Lochaber respondents. The average for the Highlands as a whole during 1997 was 5.8 previous 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 (80% and 64% respectively were on repeat trips). Again, as would be expected, the incidence of previous trips to the Highlands decreased with distance: 62% of overseas visitors interviewed during the winter months were on their first ever trip to the Highlands compared to 32% of visitors from England, Wales and Northern Ireland and only 12% of Scots.

*Previous visits to the Badenoch and Strathspey/Lochaber areas*

**Figure B-7 - Number of visits to Lochaber & Badenoch areas (inc. this one)**

Base: 202 non-Highland residents in Lochaber (winter survey)  
 195 non-Highland residents in Badenoch & Strathspey (winter survey)  
 3,120 non-Highland residents in the Highlands (March-November 1997)



Over two in every five of those interviewed in Lochaber were on their first ever visit to the area (42%), however in Badenoch and Strathspey, a much lower proportion were on their first ever visit (29%). In both cases, these are significantly lower proportions of first-time visitors than the average measured across the Highlands as a whole between march and November 1997 (48%). Again, those aged 55+ years are more likely to have been to each area before than those aged under 35 years (77% and 55% respectively were on repeat trips).

*Main reason for previous visit and time of year visited*

The sponsors were keen to establish the purpose of the previous visit to the area and in what season it had been made. These questions were only asked in the winter survey of visitors:

**Table B-7 – Main Reason for Previous Visit**

Base: 118 visitors to Lochaber who had been before (non Highland residents)

139 visitors to Badenoch & Strathspey who had been before (non Highland residents)

	<b>Lochaber Previous visitors</b>	<b>Badenoch &amp; Strathspey Previous visitors</b>	<b>All previous visitors</b>
Short Break (1-3 nights)	27	42	35
Longer holiday (4+ nights)	25	23	24
Outdoor activity	32	9	20
Skiing	8	20	14
Business/work	3	1	2
Visit friends/family	3	1	2
<b>Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>

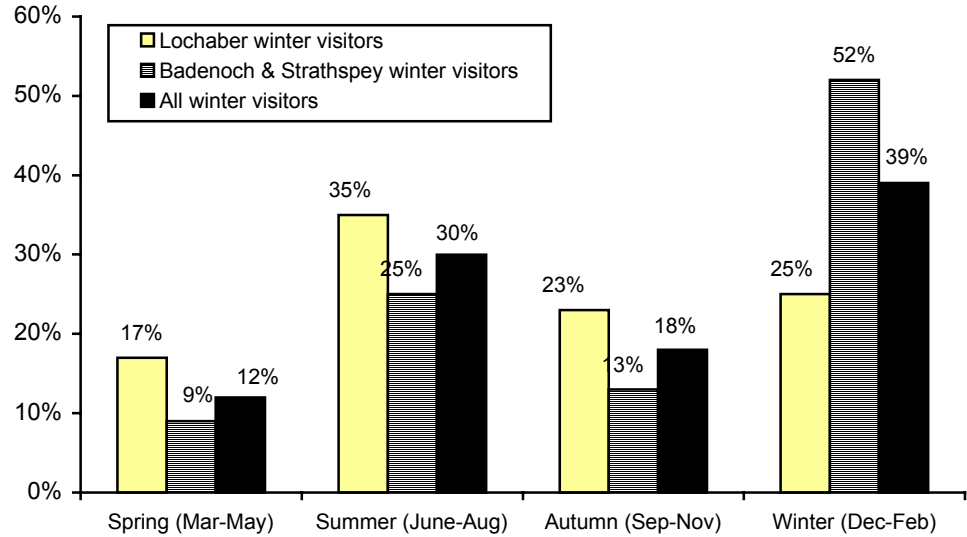
The most commonly cited purpose for the last trip to the area was for a short break of 1-3 nights duration (35%). Almost a quarter had last visited on a longer holiday however (24%), whilst one in five had visited to take part in an outdoor activity such as walking (20%) and 14% had been skiing on their last visit.

There were significant differences between the two areas however: whereas outdoor activities were much more common responses in Lochaber than Badenoch and Strathspey (32% and 9% respectively), skiing (20%) and short breaks (42%) were more popular reasons given by Badenoch and Strathspey visitors.

**Figure B-8 – Season last visited the area**

Base: 118 visitors to Lochaber who had been before (non Highland residents)

139 visitors to Badenoch & Strathspey who had been before (non Highland residents)



Whereas significant proportions of visitors to Lochaber who had been to the area before had last visited in each of the four seasons, the importance of the winter season to Badenoch and Strathspey is clearly evident: over half of those who had been before last visited during the winter months, reflecting the popularity of the area as a winter sports destination (52%).

### 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-8) below:

**Table B-8 - Areas Visited/Stayed in by winter visitors (%)**

Base: 206 winter visitors to Lochaber; 205 winter visitors to Badenoch & Strathspey

193 winter staying visitors to Lochaber; 193 winter staying visitors to Badenoch & Strathspey

	Areas visited		Areas Stayed in	
	Lochaber visitors	Badenoch/Strathspey visitors	Lochaber visitors	Badenoch/Strathspey visitors
Badenoch and Strathspey	5	100	5	98
Lochaber	100	10	86	3
Inverness, Loch Ness and Nairn	34	33	21	2
Moray	3	9	2	1
Easter Ross	3	5	3	2
Isle of Skye and Lochalsh	18	3	12	-
Wester Ross	2	2	2	1
Sutherland	3	1	1	1
Caithness	2	1	1	1
Orkney	*	*	1	1
Western Isles	1	-	2	-
<b>Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

Note - (\*) - less than 0.5%

In both Lochaber and Badenoch and Strathspey, around one third of winter visitors were visiting Inverness, Loch Ness and Nairn on their visit to the Highlands (34% and 33% respectively), making this area the most popular other area of the Highlands visited after the two areas in which the respondents were interviewed. Whilst just under fifth of Lochaber visitors also visited the Isle of Skye and Lochalsh (18%), all other part of the Highlands were visited by fewer than 10% of visitors to Badenoch and Strathspey.

Amongst those interviewed in the two areas during the winter months, who were staying at least one night in the Highlands, the overwhelming majority were staying locally: 98% of those interviewed in Badenoch and Strathspey were staying overnight in the area, a higher proportion than the 86% of visitors to Lochaber who were staying locally. Whilst over a fifth of those interviewed in Lochaber were also staying overnight in the Inverness, Loch Ness and Nairn area (21%) and 12% were staying in Skye and Lochalsh, no other area was stayed in by more than 5% of visitors. Badenoch and Strathspey visitors were

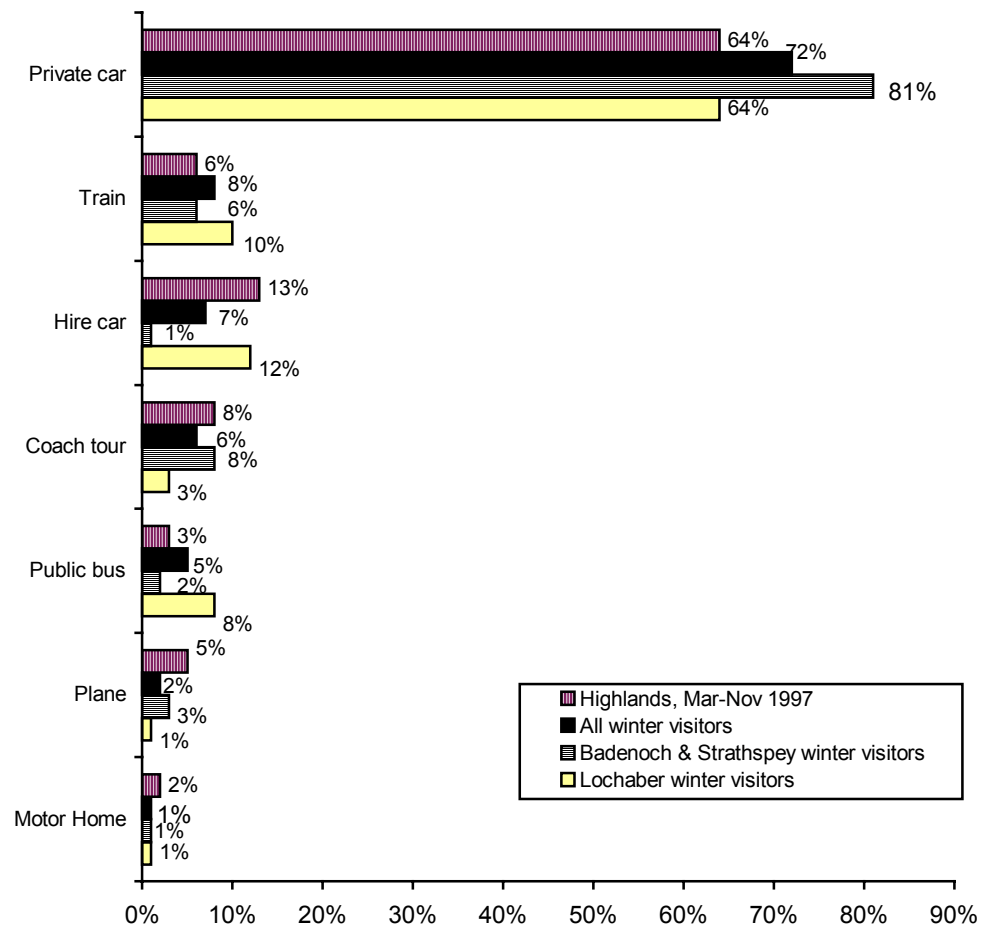
generally unlikely to be staying elsewhere on their trip, reflecting the large number of one-centre visitors to this area.

### Transport Used

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

**Figure B-9 - Forms of Transport used to get to the Highlands**

Base: 202 non-Highland residents in Lochaber (winter survey)  
 195 non-Highland residents in Badenoch & Strathspey (winter survey)  
 3,120 non-Highland residents in the Highlands (Mar-Nov 1997)



Almost three quarters of winter visitors to the Highlands used their own car on their journey to the area (72%), the same percentage as was apparent in the March-November 1997 survey for the Highlands as a whole (72%). Only four other means of transport were mentioned by 5% or more visitors as their main means of getting to the Highlands: 8% travelled by train, 7% by hire car, 6% were on a coach tour, whilst 5% arrived on a public bus service.

There were some variations in the types of transport used between the two areas however: amongst visitors to Badenoch and Strathspey, the private car

was even more dominant: four in five travelled with their own car (81%), whilst only coaches (8%) and trains (6%) carried more than 5% of visitors to the area. Visitors to Lochaber on the other hand used a wider range of transport to get to the Highlands: whilst the majority used their own car, the proportion was significantly lower than in Badenoch and Strathspey (64%), whilst as many as 12% arrived in a hire car. Train travel was also rather more popular in this area, accounting for 10% of arrivals, as were public bus services (8% in Lochaber as opposed to 2% in Badenoch and Strathspey).

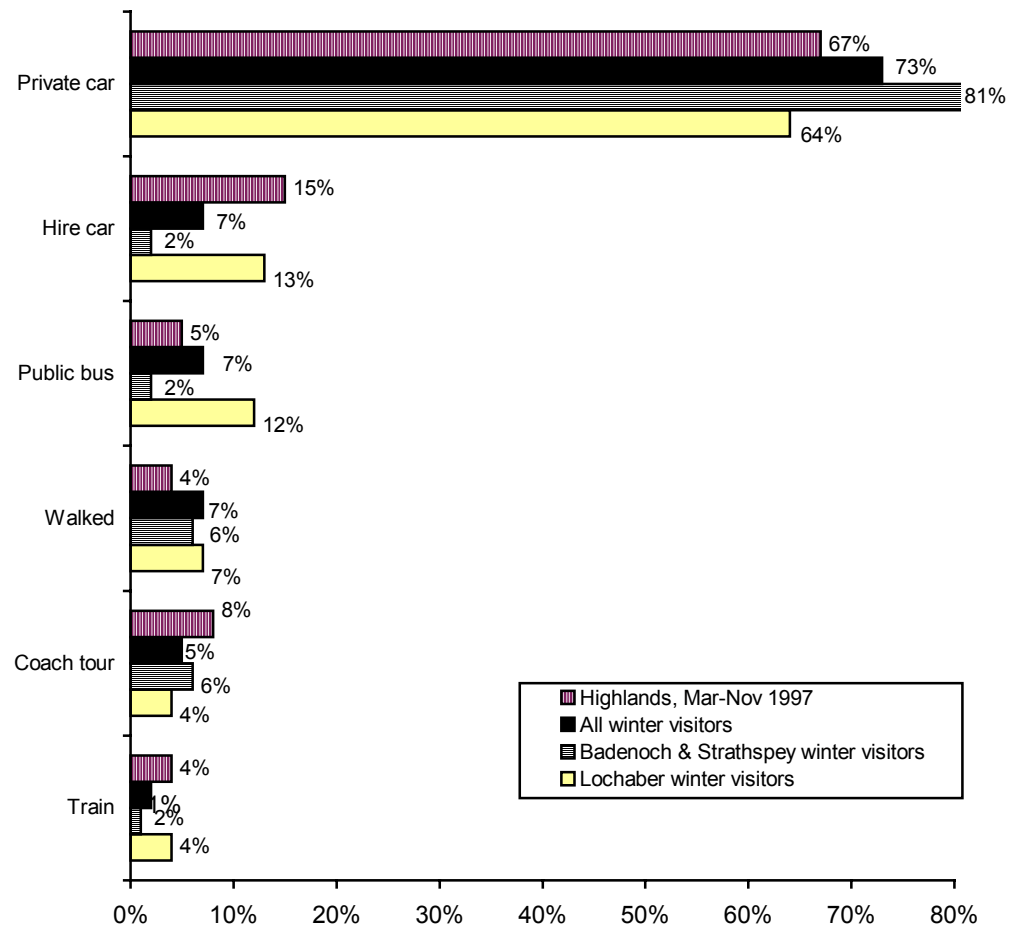
There are some variations in the forms of transport used amongst some of the key market segments:

- Under 35s: more likely to use public bus services (10%), less likely to use private car (66%);
- 35-54s: particularly likely to travel by private car (79%);
- Over 55s: more likely to be on a private coach tour (10%) or to travel by train (13%);
- Scots visitors: most likely to arrive with their own car (90%);
- Other UK visitors: more likely to use the train (10%) or to be on a coach tour on their journey to the Highlands(10%);
- Overseas visitors: more likely to use hire cars (35%) or to arrive on a public bus service (22%);

The types of transport used by visitors **whilst in the Highlands** is indicated in Figure B-10 below:

**Figure B-10 - Forms of Transport used whilst in the Highlands**

Base: 206 winter visitors to Lochaber  
 205 winter visitors to Badenoch and Strathspey  
 3,301 visitors to the Highlands, March-November 1997



Once again, around three-quarters of winter visitors to the Highlands used their own car to travel around (73%), making this the main form of transport used during their visit. Only four other forms of transport were used by 5% or more winter visitors, and all y fewer than 10%: hire cars (7%), public bus services (7%), walking (7%) and private coaches (5%).

As with the main transport type used to get to the area, the main difference between those interviewed in Lochaber and those interviewed in Badenoch and Strathspey was that a larger proportion of the latter group used their own car (81% compared with 64%), whist visitors to Lochaber tended to use a

wider range of different types of transport when in the area. Walking was popular in both areas, but analysis of the segments illustrates that this means of getting around was rather more popular amongst younger visitors: 8% of those aged under 35 years walked during their visit as opposed to 5% of those in the older age groups.

### 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-9 - Accommodation used in the Highlands (%)**

Base: 173 winter staying visitors to Lochaber;  
188 winter staying visitors to Badenoch & Strathspey;  
2,936 visitors to the Highlands staying overnight (March-November 1997)

	Lochaber winter visitors	Badenoch Strathspey winter visitors	All winter visitors	Highlands, Mar-Nov 1997
Hotel/motel	32	45	39	25
Bed and Breakfast	36	4	20	28
Rented house/flat/cottage	10	15	12	15
Timeshare	1	18	9	2
Youth Hostel	8	3	5	6
Staying with friends and relatives	5	4	4	9
Guesthouse	3	4	3	5
<b>Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

Note - (\*) - less than 0.5%

Hotels were the most popular form of accommodation used by winter visitors accounting for around four trips in every ten at that time of the year (39%). Bed and breakfast establishments were next most popular, with around one in every five winter visitors staying in this type of accommodation during their visit to the area (20%). Other than self-catering accommodation (12%), no other forms of accommodation were used by more than 9% of the winter visitors to the Highlands.

The picture during the winter is fairly different from that evident during the main season: between March and November, bed and breakfast was the most popular form of accommodation used in the Highlands (28%), although hotels and motels accounted for 25% of visitors. As would be expected, during the main season, camping (11%) and staying in caravans (15%) were much more

popular forms of accommodation than during the inter.

It is also clear that there are major variations in the types of accommodation used across the two areas: hotels were particularly popular amongst visitors to Badenoch and Strathspey area (45%), as was time share accommodation (18%) and self-catering (15%). Lochaber visitors on the other hand were significantly more likely to stay in bed and breakfast accommodation during their winter visit (36%) than winter visitors to Badenoch and Strathspey (4%). Youth hostels (8%) and other hostels and bunkhouses (6%) were also significantly more popular forms of accommodation in Lochaber than in Badenoch and Strathspey (3% and 1% respectively).

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

- Visitors aged 55+ years: more likely to stay in hotels (46%), with friends and relatives (10%) or in time share (15%), and less likely to stay in self-catering accommodation (5%) or bed and breakfast establishments (13%);
- Visitors aged under 35 years: more likely to stay in bed and breakfast establishments (25%), youth hostels (9%) or self catering accommodation (15%), but less likely to stay in hotels/motels (31%);
- Origin: almost half of the overseas visitors stayed in bed and breakfast establishments (49%), compared to 18% of those from elsewhere in the UK and 12% of Scots. Overseas visitors were also more likely to stay in youth hostels (20%) than their UK (4%) or Scots counterparts (2%). Self catering accommodation was more popular amongst visitors from elsewhere in the UK (19%) than amongst overseas and Scots visitors (8%), whilst hotels/motels were more popular amongst Scots and other UK visitors than amongst those from overseas (53%, 31% and 18% respectively);
- Length of Stay: hotels (54%) were considerably more popular forms of accommodation on 1-3 night winter breaks in the Highlands than on breaks of 4-7 nights or of 8 or more nights (29% and 5% respectively).

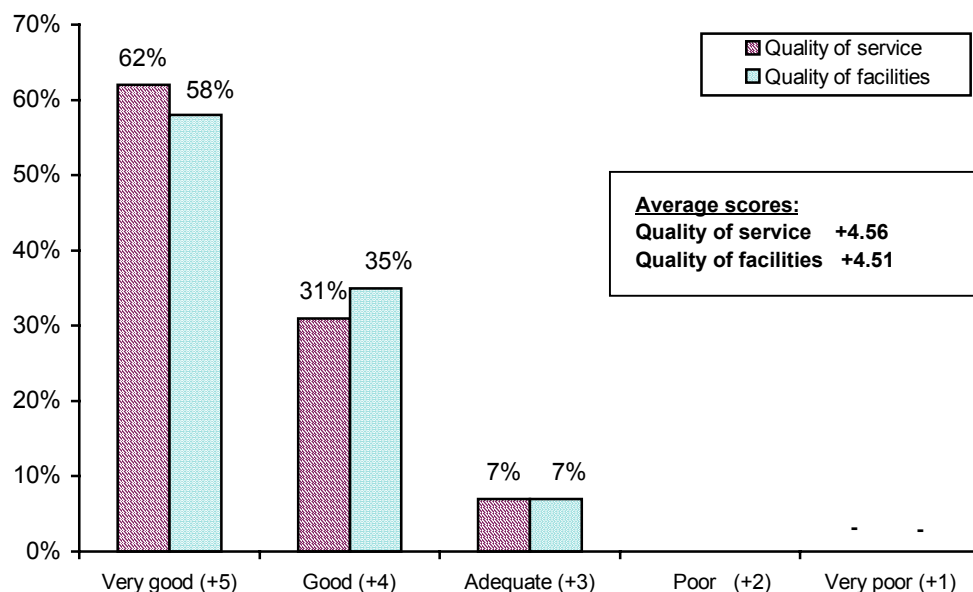
#### *Levels of satisfaction with accommodation*

Those people interviewed during the January to March period 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-11 - Rating of accommodation used by visitors (%)**

Base: 361 winter visitors to Lochaber and Badenoch & Strathspey staying in commercial accommodation



Note: (-) - nil respondents

Satisfaction levels with their accommodation were generally very high amongst those visitors to the Badenoch and Strathspey and Lochaber areas who had stayed in commercial accommodation during their trip to the Highlands. Almost two thirds (62%) described the quality of service as “very good”, whilst a further three in ten (31%) described it as “good”. 7% felt the service had only been adequate, but no respondents described the service received as either “poor” or “very poor”.

Satisfaction levels were almost as high with the quality of facilities experienced in their accommodation - 58% described them as “very good”, whilst a further 35% 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 over the winter period. Overall, the quality of service achieved a slightly higher score (+4.56) than the quality of facilities (+4.51), 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 (+4.74), Scots visitors (+4.60) and visitors from elsewhere in the UK (+4.55) and lower amongst those aged under 35 years (+4.47) and amongst visitors from overseas (+4.39). Similar reactions 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 winter visitors to the Highlands are very similar to those achieved in the March-November 1997 survey.

### 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 in the winter period by more than 5% of respondents are summarised in Table B-10a:

**Table B-10a - Activities undertaken whilst visiting the Highlands (%)**

Base: 206 winter visitors to Lochaber

205 winter visitors to Badenoch and Strathspey

3,301 visitors to the Highlands, March-November 1997

	Lochaber winter visitors	Badenoch Strathspey winter visitors	All winter visitors	Highlands, Mar-Nov 1997
<b>Any Sporting activities</b>	<b>70</b>	<b>69</b>	<b>70</b>	<b>59</b>
Low level walking of 2-8 miles	50	37	43	47
Hill walking/low level walks >8mi	21	15	18	11
Downhill skiing	17	19	18	-
Cycling/mountain biking	6	14	10	8
Mountaineering/rock/ice climbing	11	5	8	4
Horse riding/pony trekking	4	9	7	3
Fishing	2	7	5	6
Snowboarding	4	5	5	-
<b>No sporting activities</b>	<b>30</b>	<b>30</b>	<b>30</b>	<b>41</b>
<b>Any non-sporting activities</b>	<b>91</b>	<b>92</b>	<b>91</b>	<b>98</b>
General sightseeing/touring	76	75	75	91
Shopping	50	43	47	58
Leisure centre/swimming pool	18	41	30	14
Museum/art gallery/heritage cen.	25	18	21	42
Wildlife attraction	7	17	12	25
Concert/ceilidh/theatre/cinema	14	7	10	11
Archaeological site	9	3	6	17
<b>No non-sporting activities</b>	<b>9</b>	<b>8</b>	<b>9</b>	<b>2</b>
<b>Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

As many as seven in every ten visitors to both Lochaber (70%) and Badenoch and Strathspey (69%) were taking part in some sporting/outdoor activities during their winter trip to the Highlands, a significantly higher proportion than the averages for the Highlands as a whole in the main March-November period (56%). This suggests that a greater proportion of winter holiday visitors to the Highlands were on a sporting or activity holiday than those visiting at other times of the year. As in the main season survey, a higher proportion of

visitors to the area during the winter period were undertaking non-sporting activities during their visit: 91% of visitors to Lochaber and 92% of visitors to Badenoch and Strathspey were undertaking some forms of non-sporting activities during their winter visit.

In both areas, but particularly in Lochaber, the most common sporting activity was low level walking of between two and eight miles distance: half of the winter visitors to Lochaber were taking part in this activity during their trip (50%), although as many as 37% of Badenoch and Strathspey visitors were taking part. In Badenoch and Strathspey, the second most popular winter sporting activity was downhill skiing (19%), although in Lochaber this was their most popular activity (17%) with a larger proportion going on hill walks and low level walks of over 8 miles. It should be borne in mind that the 1998 winter season did not provide skiers with much in the way of snow, and hence the proportion of those on a skiing holiday who were interviewed in this survey will be significantly lower than could be expected under better skiing conditions.

As might be expected, general sightseeing and touring was the most commonly cited non-sporting activity undertaken by winter visitors, although the proportions undertaking this activity were significantly lower than in the main season: around three quarters went sightseeing in both areas during the winter (76% in Lochaber, 75% in Badenoch and Strathspey), compared with 91% during the March-November 1997 period. Around half went shopping during their winter visit to the Highlands (50% Lochaber; 47% Badenoch and Strathspey), whilst visits to leisure centres and swimming pools were considerably popular in Badenoch and Strathspey during the winter survey (41%), a much higher figure than in Lochaber (18%) and compared with the 1997 main season average across the Highlands of 14%.

Table B-10b provides information on those activities undertaken as the main reason for the trip amongst winter visitors to the Highlands. Those mentioned by 2% or more respondents are listed:

**Table B-10b - Activities undertaken as MAIN ACTIVITY in the Highlands (%)**

Base: 206 winter visitors to Lochaber

205 winter visitors to Badenoch and Strathspey

3,301 visitors to the Highlands, March-November 1997

	Lochaber winter visitors	Badenoch Strathspey winter visitors	All winter visitors	Highlands, Mar-Nov 1997
<b>Any Sporting activities</b>	<b>47</b>	<b>40</b>	<b>44</b>	<b>17</b>
Low level walking of 2-8 miles	19	11	15	8
Downhill skiing	8	15	12	-
Hill walking/low level walks >8mi	10	6	8	1
Mountaineering/rock/ice climbing	6	3	5	1
Snowboarding	2	2	2	-
Cycling/mountain biking	1	2	2	1
<b>No sporting activities</b>	<b>53</b>	<b>60</b>	<b>56</b>	<b>83</b>
<b>Any non-sporting activities</b>	<b>51</b>	<b>60</b>	<b>55</b>	<b>82</b>
General sightseeing/touring	45	52	48	75
Shopping	2	3	3	2
Leisure centre/swimming pool	-	4	2	-
<b>No non-sporting activities</b>	<b>49</b>	<b>8</b>	<b>45</b>	<b>18</b>
<b>Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

When asked to indicate which one activity, if any, could be described as their main activity during their trip to the Highlands during the winter, as many as 44% of visitors mentioned a sporting activity, a significantly higher proportion than during the main season when only 18% of visitors were on a sporting holiday. Low level walking was the main activity mentioned, although hillwalking was also very popular: combined, around 23% of visitors claimed that the main activity undertaken on their winter trip to the Highlands was walking. It was more popular in Lochaber (29%) than in Badenoch and Strathspey (17%).

Some 15% of visitors to Badenoch and Strathspey were on a skiing holiday, making this the most important winter sporting activity during 1998, at a time when snow conditions were generally unfavourable for skiing. Fewer visitors were in Lochaber to go skiing (8%), with both low level walking and hill walking more popular during the winter of 1998 (19% and 10% respectively).

As many as 55% described a non-sporting activity however, with general sightseeing/touring far and away the main activity undertaken (45% of visitors to Lochaber and 52% of visitors to Badenoch and Strathspey).

### **Characteristics of Skiing Visitors**

As part of the winter survey, a number of questions were included which were designed to establish some further details and characteristics of this important winter market to both Lochaber and Badenoch and Strathspey. Unfortunately, the poor ski conditions experienced during the January to March period meant that a relatively small number of respondents were eligible for interview. Consequently, it is not possible to compare the characteristics of skiing visitors to each of the two areas. Given that only 85 respondents were taking part in skiing or snowboarding, care should be taken in interpreting the results.

Overall, some 18% of visitors to the Highlands during the winter period were skiing during their trip. The following segments were rather **more likely** to be skiing:

- those aged under 35 years (19%);
- ABC1s (19%);
- Visitors to Badenoch and Strathspey (19%);
- Visitors from elsewhere in the UK (21%);
- those staying for 4 or more nights (23%);
- those on their first ever trip to the Highlands (21%).

The following segments were rather **less likely** to be on a skiing trip:

- those aged 55+ years (12%);
- C2DEs (17%);
- Visitors to Lochaber (17%);
- Visitors from Scotland or overseas (15% and 16%);
- those staying for 1-3 nights (14%).

### *Trip planning and areas visited*

Those who were skiing or snowboarding were asked to indicate whether or not

they had planned their trip in advance:

**Table B-11 – Planning of the Skiing trip to the Highlands (%)**

Base: 85 winter visitors who were skiing/snowboarding

	<b>All winter visitors</b>
Arranged trip for some time in anticipation of good skiing conditions	60
Waited until suitable skiing conditions arose	19
Other	21
<b>Total:</b>	<b>100</b>

Amongst those who were skiing or snowboarding during their visit to the Highlands, three in five had booked and arranged their trip some time in advance in the hope and anticipation for good conditions (60%). Only around one in every five (19%) waited until the last moment for suitable conditions before making arrangements to visit.

Visitors were then asked to indicate which ski areas they had visited on this trip and which they intended to visit:

- Cairngorm 58%
- Nevis Range 42%
- Glencoe 12%
- The Lecht 5%
- Glenshee 1%
- None of these 6%

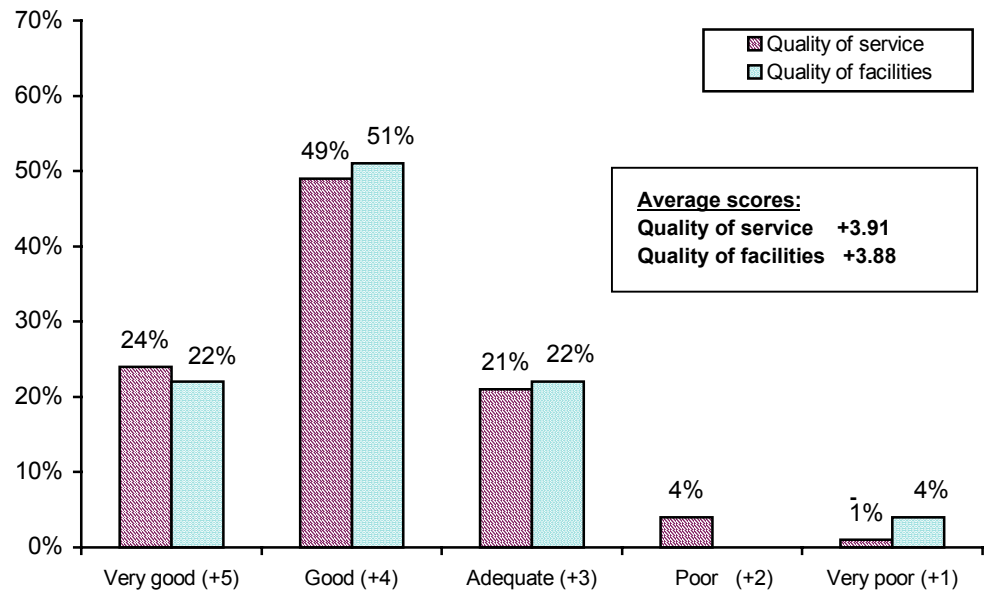
Cairngorm (58%) and Nevis Range (42%) represented the two most popular ski areas, and not surprisingly they were most popular amongst visitors to each area: 80% of Lochaber skiing visitors went skiing in Nevis range, whilst 98% of Badenoch and Strathspey skiing visitors skied at Cairngorm.

*Levels of Satisfaction with Facilities at Ski Centres*

Skiing visitors were then asked to rate both the quality of service and the quality of facilities experienced at the ski facilities in the Highlands:

**Figure B-12 - Rating of Ski Facilities (%)**

Base: 85 winter visitors who took part in skiing/snowboarding



Whilst the majority of respondents described the facilities and service on offer at the ski centres in the Highlands quite positively (73% described both the service and the facilities as “very good” or “good”), significant minorities only described them as adequate (21% and 22% respectively), whilst 5% and 4% described them as “Poor/Very Poor”.

Given that in visitor surveys, respondents are normally predisposed to answer questions positively, the fact that over a quarter of users described them as at best adequate suggests there may be some cause for concern.

### Attractions visited and levels of satisfaction

#### *Attractions visited – Badenoch and Strathspey*

Respondents interviewed in Badenoch and Strathspey during the January-March period 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:

**Table B-12 - Attractions visited in Badenoch and Strathspey (%)**

Base: 205 winter visitors to Badenoch & Strathspey

	Winter Survey, 1998
Landmark, Carrbridge	22
Loch Morlich	21
Rothiemurchus Visitor Centre	18
Glenmore Forest Park Visitor Centre	16
Santa Claus Land, Aviemore	15
Reindeer Centre, Glenmore	14
Loch an Eilean	13
Dalwhinnie Distillery	13
Highland Wildlife Park, Kincaig	12
Waltzing Waters, Newtonmore	9
Speyside Heather Centre	7
Loch Insh	6
Loch Gartern Nature Reserve	6
Revack Country Estate and Visitor Centre	6
Strathspey Steam Railway	5
Folk Museum, Kingussie	5
RSPB Insh Marshes Reserve	3
Folk Park, Newtonmore	1
None of these	30
<b>Total:</b>	<b>100</b>

In Badenoch and Strathspey, around seven in every ten visitors to the area visited at least one attraction on their trip (70%). Two attractions were visited by more than one in five of them: Landmark in Carrbridge (22%) and Loch Morlich (21%). A further seven attractions were visited by between 12% and 18% of visitors however, indicating the wide range of attractions available to visitors within Badenoch and Strathspey, even during the off-peak holiday season.

*Attractions visited – Lochaber*

Respondents in the Lochaber area were presented with a list of the attractions in Lochaber 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-13 below):

**Table B-13 - Attractions visited in Lochaber (%)**

Base: 206 visitors to Lochaber

	<b>Winter Survey, 1998</b>
The West Highland Museum, Fort William	11
Glencoe Visitor Centre	7
Ben Nevis Whisky Visitor Centre	7
Glenfinnan Monument, Loch Shiel	2
Mallaig Marine World, Mallaig	2
Glenfinnan Station Museum	2
Mallaig Heritage Centre, Mallaig	2
Ionad Nisbheis Visitor Centre, Glen Nevis	1
Natural History Centre, Ardnamurchan	1
Glencoe and North Lorn Folk Museum	1
None of these	73
<b>Total</b>	<b>100</b>

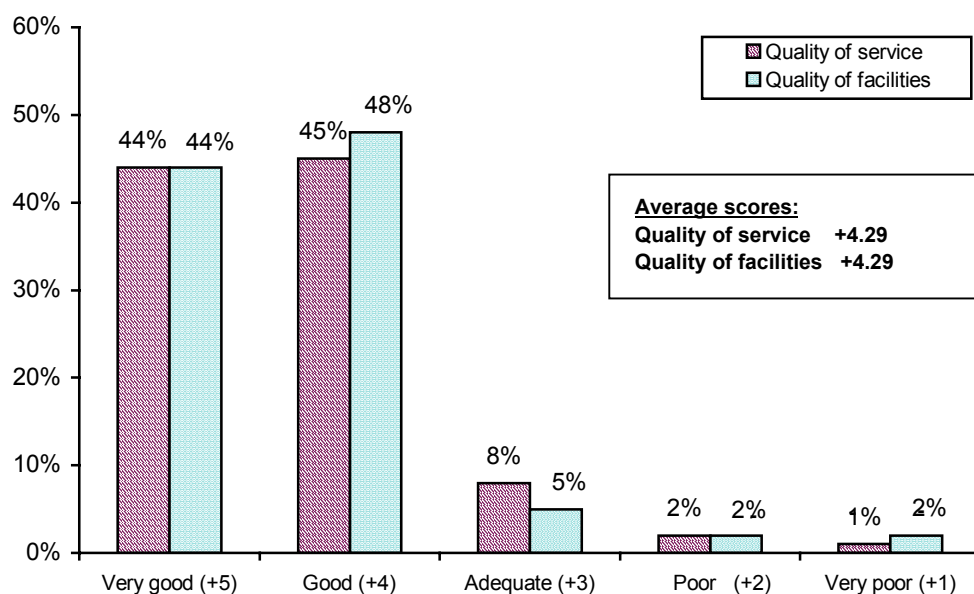
Almost three-quarters of visitors to Lochaber between January and March 1998 had not visited any of the area's built attractions during their trip (73%). The West Highland Museum in Fort William was the most visited attraction, but even here, only one visitor in every nine to the area visited (11%). Only two other attractions were visited by more than 5% of respondents: both Glencoe Visitor Centre and the Ben Nevis Whisky Visitor Centre were visited by 7% of visitors to the area during the winter months. All other attractions in the area received 2% or fewer visitors.

*Levels of satisfaction with attractions*

Those people interviewed in the both Badenoch and Strathspey and Lochaber during the January to March period were asked to rate the quality of service and the quality of facilities experienced in visitor attractions throughout the Highlands:

**Figure B-13 - Rating of attractions (%)**

Base: 165 winter visitors who visited attractions



Note: (-) - nil respondents

Satisfaction levels with attractions visited in the Highlands were generally high amongst winter visitors to the Highlands. Similar proportions described both the quality of the service and the facilities experienced in Highland attractions as “Very good” (44% in each case) or “good” (45% and 48% respectively). As with some of the other aspects of their trip however, winter visitors to the Highlands were slightly less praiseworthy of the attractions than visitors had been during the main summer season, perhaps reflecting the more limited choice and opening hours at this time of the year. One in twelve (8%) described the service as merely “adequate” whilst a further 3% described it as “poor” or “very poor”.

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 and facilities on offer at Highland attractions achieved identical scores of +4.29.

### **Use of Tourist Information Centres and levels of satisfaction**

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

Just a round two in five visitors to the Highlands during the winter period had visited a Tourist Information Centre on their visit (41%), a much lower proportion than that for the Highlands as a whole during the main season in 1997 (56%). There were also major variations in this figure across the two areas surveyed: whilst 72% of visitors to Lochaber had visited a TIC on their trip, the corresponding percentage for Badenoch and Strathspey was only 10%.

The lower visitation levels at this time of the year are undoubtedly a reflection of two factors: the seasonal operation and at best, limited opening hours operated by Highland TICs during the first quarter of the year, and the fact that there were fewer overseas visitors around at this time of the year. The main survey in 1997 demonstrated that the most frequent users of Highland TICs were overseas visitors.

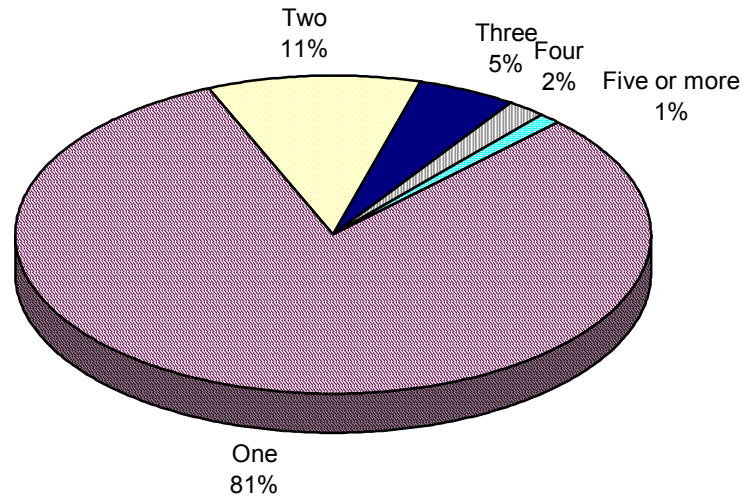
As in the main survey, likelihood to visit TICs varied across many of the market segments. Those most likely to have visited a TIC included visitors aged under 35 years (48%), ABC1s (44%), overseas visitors (73%) and those from other parts of the UK (49%), those staying for four nights or more (48%), and those making their first ever trip to the Highlands (56%).

Amongst the 59% of visitors who had not visited a TIC on their trip, only around 24% of them intended to visit one at some stage, whereas three quarters of them had no intention of visiting a TIC (75%). In total therefore, just over half of the visitors had either already visited or intended to visit a TIC on their trip (55%), a lower proportion than that recorded in the Highlands as a whole during the 1997 main season.

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

**Figure B-14 - Number of visits to Highland TICs**

Base: 169 winter respondents who had visited a TIC



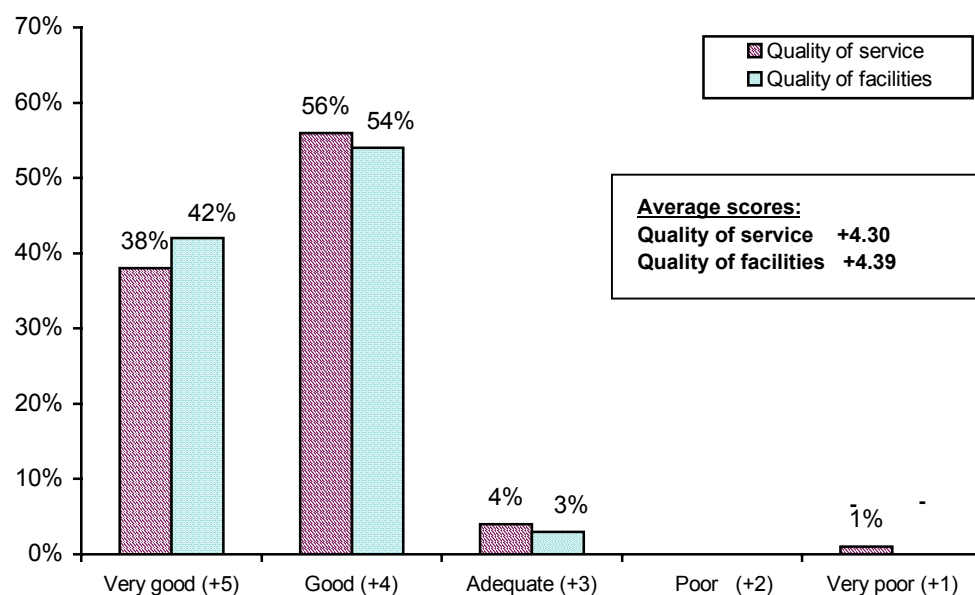
Over four in every five of those interviewed had visited one Tourist Information Centre on their visit to the Highlands (81%), whilst a further 11% had visited two TICs (24%), and 8% had visited three or more. On average, respondents had visited 1.31 TICs on their trip to the Highlands. Those aged under 35 years (1.42 visits), ABC1s (1.38 visits), and overseas visitors (1.61 visits), were more likely to have visited a greater number of TICs.

*Levels of satisfaction with Tourist Information Centres*

Those people interviewed during the winter season 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-15 - Rating of TICs by winter visitors (%)**

Base: 169 winter respondents who had visited a TIC



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 high: in each case, around four in ten described them as “very good” (38% and 42% respectively), and over half (56% and 54%) described them as good. Encouragingly, only 1% of TIC visitors described the service received as “very poor” and none of them described the facilities on offer as “poor” or “very poor”.

As with accommodation, visitor attractions and ski facilities, 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 satisfaction scores of +4.30 and +4.39 respectively. There were no statistically significant variations in these scores amongst any of the key market segments.

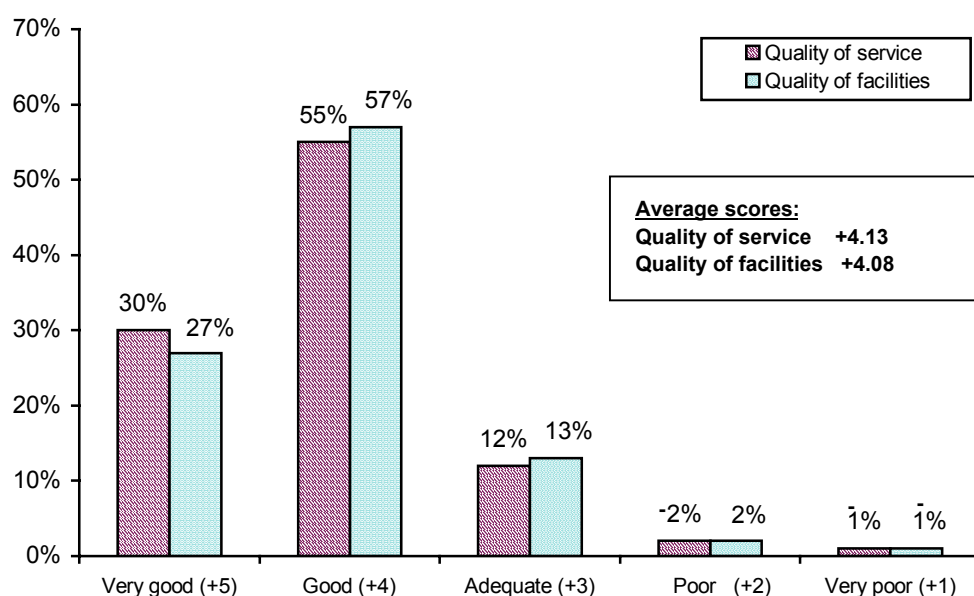
### Levels of satisfaction with shops, pubs and restaurants

In addition to levels of satisfaction with the quality of service obtained in their accommodation, attractions visited, ski facilities 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-16 - Rating of shops (%)**

Base: 330 winter visitors to shops



Note: (-) - nil respondents

Overall levels of satisfaction with both the quality of service and facilities on offer in Highland shops were fairly high with 85% and 84% respectively describing the service and facilities on offer as being “good” or “very good”. Once again however, significant minorities described them as merely “adequate” (12% and 13% respectively), whilst in each case, 3% described them as “poor” or “very poor”.

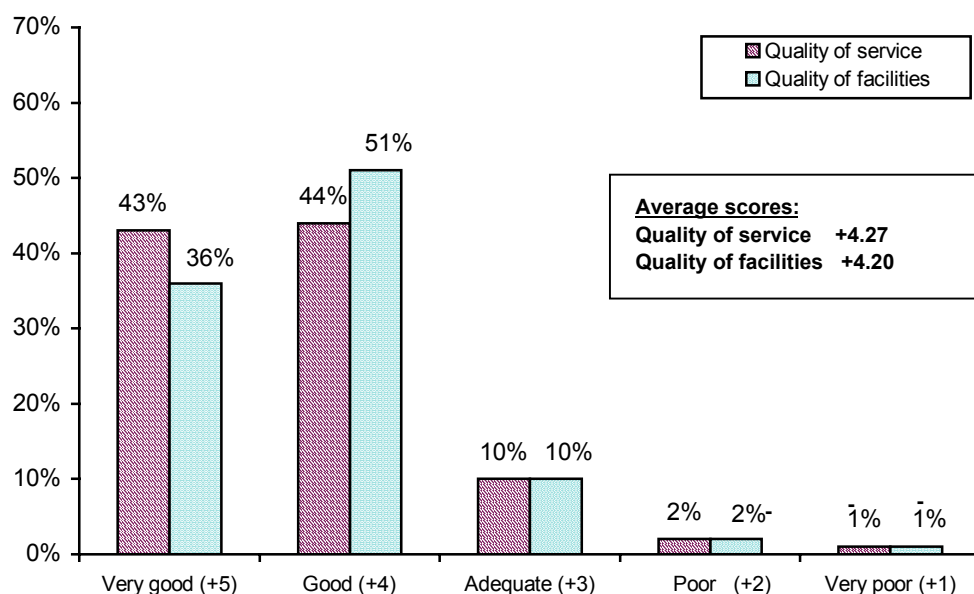
Bearing in mind the point made already that respondents in this type of survey are typically predisposed to answer these types of questions fairly positively, these significant proportions who did not describe the service or facilities available in Highland shops as “good” suggest that there is little room for complacency.

Scores of +4.13 (service) and +4.08 (facilities) are however fairly encouraging, although once again, the lowest scores were provided by those aged under 35 years.

*Pubs and Restaurants*

**Figure B-17 - Rating of pubs/restaurants (%)**

Base: 290 winter visitors to pubs/restaurants



Note: (-) - nil respondents

As with most of the other aspects of the Highland tourism product, winter visitors to the Highlands were fairly satisfied with both the quality of service and facilities on offer in Highland pubs and restaurants: in each case, around 87% described the service and facilities on offer as “good” or “very good”. The balance regarding service was more towards “very good” whereas in terms of facilities, a greater proportion described them as “good”. Again, significant proportions only described each aspect as “adequate” (10% in both cases, whilst 3% described them as “poor/very poor”.

On average, the quality of service achieved an average score of +4.27 and the facilities achieved a score of +4.20. Once again, satisfaction levels would appear to be highest amongst older visitors and lowest amongst those from overseas.

### Badenoch and Strathspey – specific questions

Badenoch and Strathspey respondents were asked a series of questions about Aviemore. Some 96% of them had visited Aviemore on this trip, although this is not surprising given that most of the interviews were conducted there.

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: 197 winter respondents who had visited Aviemore on their current visit  
332 respondents (March-November) who had visited Aviemore on their current visit

	Winter Survey, 1998	Main Season Survey, 1997
Shops (convenience)	52	69
Restaurants/cafes/carry out food	54	56
Shops (speciality/gifts)	63	56
Petrol Station	31	36
Public Toilets	10	29
Tourist Information Centre	8	26
Bar/public house	27	24
Tourist accommodation	7	17
Cinema	2	2
None of these	5	6
<b>Total:</b>	<b>100</b>	<b>100</b>

As in the main season survey conducted in 1997, three facilities were used by over half of those respondents who had visited Aviemore: shops - for convenience shopping (52%), shops - for gifts etc (63%) and restaurants, cafes and carry out food establishments (54%). Just under a third had visited the Petrol Station, whilst over a quarter had visited a bar/public house (27%). All other facilities were used by 10% or fewer visitors to Aviemore during the winter season suggesting lower levels of use of Aviemore's facilities at this time of the year than during the main season when only the cinema recorded usage levels of less than 10%.

The 8% of respondents who had visited the Tourist Information Centre in Aviemore were asked to indicate the main reasons for visiting this facility (N=15 respondents):

- To see what's on 7 respondents
- Ski conditions 5 respondents
- Information on the area 4 respondents
- Information on accommodation 2 respondents
- For books/maps 2 respondents
- For leaflets 2 respondents
- To ask directions 1 respondent

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: 197 winter respondents who had visited Aviemore on their current visit  
332 respondents (March-November) who had visited Aviemore on their current visit

	Winter Survey, 1998	Main Season Survey, 1997
<b>Day Trippers</b>	<b>42</b>	<b>66</b>
Less than one hour	4	17
1-2 hours	9	21
2-4 hours	23	17
4+ hours	6	11
<b>Overnight Visitors</b>	<b>58</b>	<b>34</b>
1-2 nights	28	11
3-4 nights	10	8
5-6 nights	6	3
7 nights	10	8
8+ nights	4	4
<b>Total:</b>	<b>100</b>	<b>100</b>

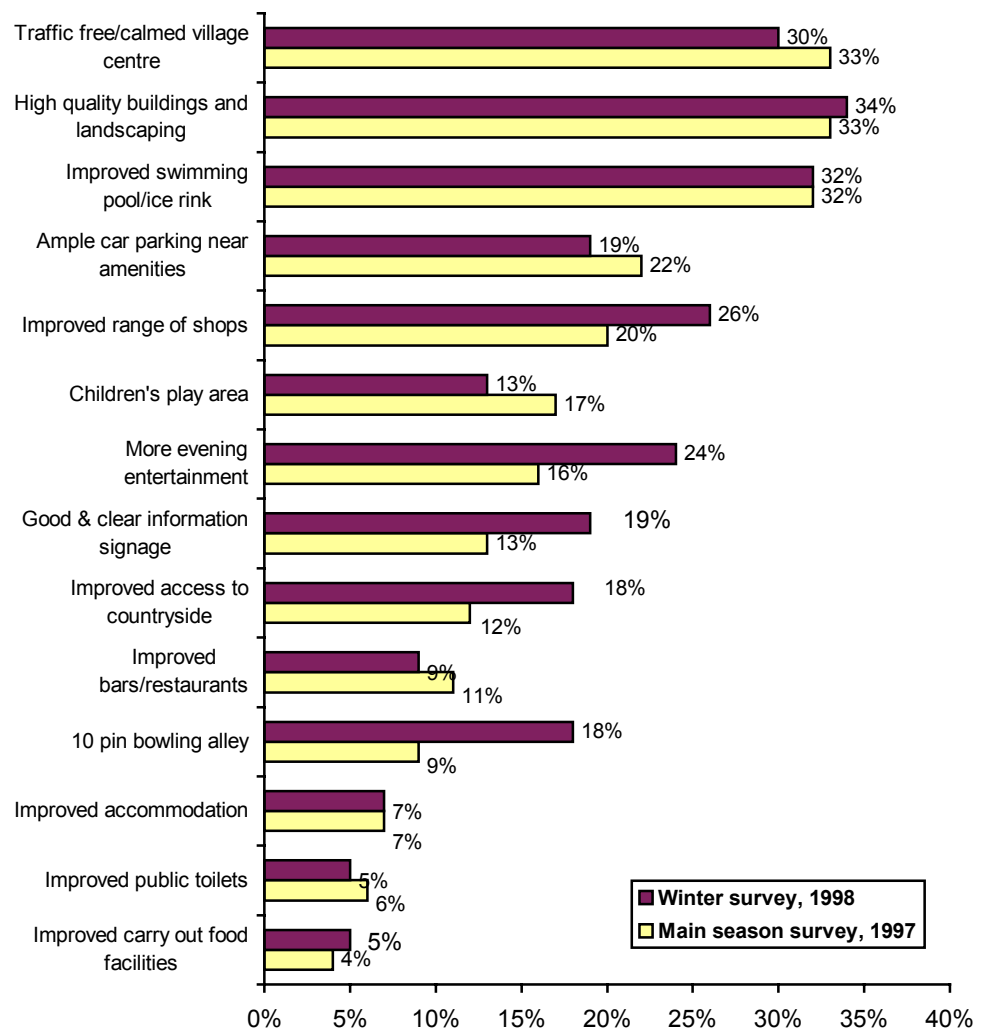
Whereas the majority of those interviewed during the main season in 1997 had visited Aviemore on a day trip (66%), during the January-March 1998 period, the largest proportion of those interviewed were staying overnight in the village (58%). Most commonly, they were staying for one or two nights (28%), although one in five were staying in Aviemore for five nights or longer (20%). Amongst day-trippers, the most common length of stay in the village was

between two and four hours, with 23% of visitors staying for that length of time.

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-18: Most popular proposed developments to Aviemore (%)**

Base: 197 winter respondents who had visited Aviemore on their current visit  
332 respondents (March-November) who had visited Aviemore on their current visit



Amongst visitors to Aviemore, in both the 1997 main season survey and the 1998 winter survey, three of the listed proposals emerged as being of greatest importance and received most votes in terms of popularity: the creation of a traffic-free or traffic-calmed centre (30% in the winter survey, 33% in the main season survey), high quality buildings and landscaping using natural materials

(33% and 34% respectively), and improvements to the swimming pool and ice rink complex (32% each time). All other proposed developments were mentioned by 26% or fewer visitors to the village.

### Lochaber - Specific questions

As in Badenoch and Strathspey, visitors interviewed in Lochaber during the winter season were asked a series of questions which were specific to their visit to the local area.

#### *Attitudes and Opinions about Lochaber*

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

**Table B-16 - Attitudes and Opinions in Lochaber (%)**

Base: 206 winter visitors to Lochaber

	Agree strongly (+2)	Agree (+1)	Neither (-)	Disagree (-1)	Disagree strongly (-2)	Mean score
<u>POSITIVE STATEMENTS</u>						
- Signposts in the area which show the Gaelic place names are a particular attraction	3	26	43	21	1	+0.08
<u>NEGATIVE STATEMENTS</u>						
- Signposting to places of interest in the area should be improved	1	12	20	57	2	-0.51
- There is not much to do in the area when there's no snow	1	10	12	59	11	-0.74
- Lochaber is only for those who enjoy the outdoor life	1	29	13	50	2	-0.25

By applying scores from +2 (agree strongly), to -2 (disagree strongly), it is possible to obtain a broad comparison of the relative strength of feeling about each statement.

“Signposts in the area which show the Gaelic place names are a particular attraction”:

Around three in ten visitors agreed with this statement (29%), although the majority were in the lower ranking category of “agree”. Around a fifth of those interviewed disagreed (22%).

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

Almost six in ten visitors disagreed with this statement (59%). However, with 13% of visitors in some agreement, this may suggest that the issue of tourist signposting is worth addressing.

“There is not much to do in the area when there’s no snow”

This statement was included on the assumption that a larger number of visitors may have been attracted to Lochaber for skiing, although during 1998 this would not appear to be the case. Seven in ten respondents disagreed with this statement (70%).

“Lochaber is only for those who enjoy the outdoor life”

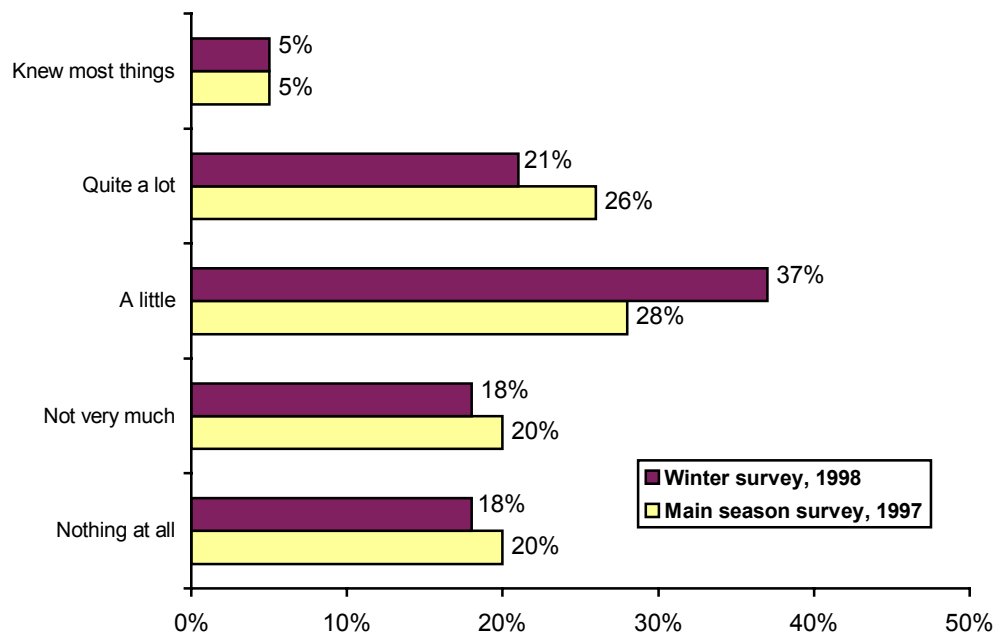
With around three in ten visitors agreeing with statement (30%) it would suggest either that there is a potential to educate people more about other activities available in Lochaber, not just those that are outdoor. Around half of respondents disagreed with this statement (52%).

*Prior knowledge of Lochaber*

Visitors to Lochaber were asked to indicate how much they had known about the area prior to their visit (see Figure B-19 below):

**Figure B-19 -Prior knowledge of Lochaber**

Base: 206 winter visitors to Lochaber  
578 visitors to Lochaber



Evidently the majority of respondents knew at best very little about Lochaber prior to their current visit: 36% of winter visitors claimed to have known either nothing or not very much, whilst a further 37% only knew “a little”. This suggests that the potential which exists for the tourist industry in Lochaber and the area tourist board to raise the profile of the area through further promotion. Those types of respondents most likely to know nothing about Lochaber prior to their visit included:

- those aged under 35 years (22%)
- first time visitors (44%)
- overseas visitors (40%).

*The visit to Lochaber: Expectations vs. Reality*

Another measure of visitor satisfaction was obtained by asking respondents how their trip to Lochaber had compared with what they had expected (see Table B-17 below):

**Table B-17 - How the trip to Lochaber compared with expectations (%)**

Base: 206 winter visitors to Lochaber

578 visitors to Lochaber, March-November 1997

	Winter Survey, 1998	Main Season Survey, 1997
Better than expected (+1)	15	37
About the same as expected (0)	58	51
Worse than expected (-1)	12	2
Didn't know what to expect	15	10
<b>Total:</b>	<b>100</b>	<b>100</b>
Mean score	+0.04	+0.38

Whereas during the main season survey, almost four visitors in every ten to the area described their visit as having been better than expected (37%), only 15% described their winter visit in such terms. Three in five (58%) felt it had been much as they had expected (51%), and 15% had not known what to expect, however a relatively large proportion described their winter visit as having been worse than expected (12%), thus indicating lower degrees of satisfaction than had been evident in the main 1997 survey.

Those visitors who described their trip to Lochaber as having been better or worse than expected, were asked for their reasons. A wide range of reasons were provided by the 31 respondents who described their visit as better than expected, although those mentioned by 4 or more were as follows:

- Scenery picturesque 13 respondents
- Weather good 8 respondents
- People friendly 6 respondents
- Snow which we hadn't expected 4 respondents
- Plenty to do 4 respondents
- Specific places mentioned 4 respondents

Some 24 respondents described their visit to Lochaber as having been worse than expected. The main reasons provided were as follows:

- No snow/weather 11 respondents
- No skiing/snowboarding 9 respondents
- Nothing to do 6 respondents
- Teletext snow reports misleading 2 respondents.

### Expenditure

Finally, all of those interviewed in the winter 1998 survey were asked to indicate how much they had spent on their trip to the Highlands. With only 50 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 361 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-18 - Amount spent per day**

Base: 361 winter staying visitors to Lochaber and Badenoch & Strathspey  
2,936 visitors to the Highlands staying overnight (March-November 1997)

	Spend per night (including on others)....		Spend per night per person....	
	Winter Survey, 1998	Highlands Main Season Survey, 1997	Winter Survey, 1998	Highlands Main Season Survey, 1997
Accommodation	£32	£38	£16	£18
Food and drink (outside accommodation)	£19	£23	£9	£10
Entertainment				
Shopping	£2	£5	£1	£2
Transport	£10	£14	£5	£7
Ski Hire, passes, instructions etc	£9	£12	£5	£6
<b>Total:</b>	£3	-	£1	-
	<b>£74</b>	<b>£92</b>	<b>£37</b>	<b>£43</b>

Typically, respondents interviewed between January and March 1998 in Badenoch and Strathspey and Lochaber spent £74 per day during their trip to the Highlands on themselves and others in their party, a significantly smaller amount to the average spent in the Highlands as a whole during the 1997 main season (£92). This averaged out at an average spend of £37 per person per day, £6 per person per night less than during the main season.

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

- those aged under 35 years (£42), those staying in bed and breakfast establishments (£42) and in hotels (£45), overseas visitors (£42) and those from other parts of the UK (£41), and visitors to Lochaber (£41).

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

- those aged 55+ years (£26) and those aged 35-54 (£34), those who were self-catering (£31), Scots visitors (£33), and visitors to Badenoch and Strathspey (£34).

By applying the average length of stay figures to the daily expenditure estimates indicated in Table B-18, 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 during the winter months. Figures are also provided for comparison of spend per trip to the Highlands as a whole during the 1997 main season:

**Table B-19 - Amount spent per trip**

Base: 361 winter staying visitors to Lochaber and Badenoch & Strathspey  
2,936 visitors to the Highlands staying overnight (March-November 1997)

	Spend per trip (including on others).....		Spend per person per trip.....	
	Highlands Winter Survey, 1998	Highlands Main Season Survey, 1997	Highlands Winter Survey, 1998	Highlands Main Season Survey, 1997
<i>Average length of Stay</i>	<i>4.7 nights</i>	<i>7.0 nights</i>	<i>4.7 nights</i>	<i>7.0 nights</i>
Accommodation	£150	£266	£75	£126
Food and drink (outside accommodation)	£89	£161	£42	£70
Entertainment	£9	£35	£5	£14
Shopping	£47	£98	£24	£49
Transport	£42	£84	£24	£42
Ski Hire, passes, instructions etc	£14	-	£5	-
<b>Total:</b>	<b>£348</b>	<b>£644</b>	<b>£174</b>	<b>£301</b>

Typically, winter visitors to the two areas spent around £350 during their trip to the Highlands on themselves and others in their party. This averaged out at an average spend of around £174 per person on their trip to the area. Given that the average length of stay in the Highlands during the 1997 main season was 7 nights, and the per night expenditure was higher, it is not surprising that main season per trip spending was considerably higher (£301 per person).

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

- those aged 35 years and under (£185), those who were staying in bed and breakfast establishments (£193) or who were self-catering (£202), visitors from other parts of the UK (£226) or from overseas (£315).

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

- those aged 55+ years (£135), C2DEs (£153), those staying in hotels and guesthouses (£144), and Scots visitors (£99).

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 Highlands during the winter season amongst the different market segments. This is summarised in Table B-20 below:

**Table B-20 - Spending per party**

Base: 361 winter staying visitors to Lochaber and Badenoch &amp; Strathspey

	Spend/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	£42	4.4 nights	£185	2.7 people	£500
35-54	£34	4.8 nights	£163	3.2 people	£522
55+	£26	5.9 nights	£153	2.6 people	£398
<i>Social Class</i>					
ABC1	£37	4.9 nights	£181	2.9 people	£525
C2DE	£38	4.3 nights	£163	3.0 people	£489
<i>Type of Holiday</i>					
Repeat trip	£36	5.0 nights	£180	2.7 people	£486
1 <sup>st</sup> time in Highlands	£39	4.1 nights	£160	3.0 people	£480
<i>Accommodation Used</i>					
Hotels/Guesthouses	£45	3.2 nights	£144	2.8 people	£403
Bed and Breakfasts	£42	4.6 nights	£193	2.4 people	£463
Self-catering	£31	6.5 nights	£202	3.9 people	£788
<i>Origin</i>					
Scotland	£33	3.0 nights	£99	2.8 people	£272
Other UK	£41	5.5 nights	£226	3.2 people	£723
Overseas	£42	7.5 nights	£315	2.6 people	£819
<i>Area</i>					
Lochaber	£41	4.4 nights	£180	2.6 people	£468
Badenoch & Strathspey	£34	4.9 nights	£167	3.2 people	£534
<b>Total:</b>	<b>£37</b>	<b>4.7 nights</b>	<b>£174</b>	<b>2.9 people</b>	<b>£505</b>

In terms of total trip spending per party during the winter season, the average spend was around £500. The highest spenders were those staying in self-catering establishments (£788), a reflection of their long stays locally and larger party sizes. Other high spenders were overseas visitors (£819) and visitors from other parts of the UK (£723). On the other hand, lowest spenders were Scots, who spent around £272 per trip to the Highlands.

## C. Appendix 1: Social Class

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

## **D. Appendix 2: Questionnaires**

