

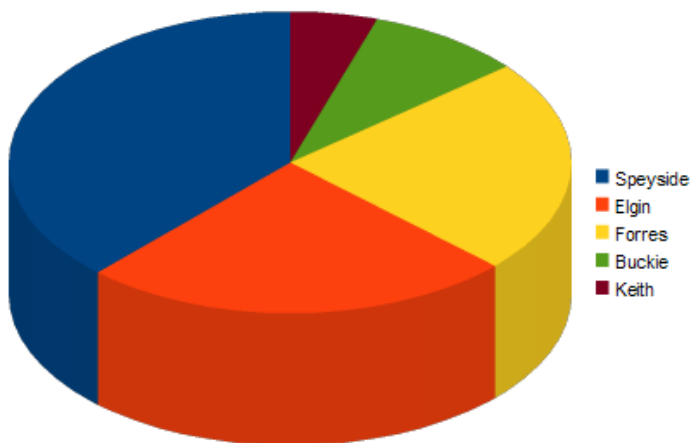
Sample

The Moray Business Barometer online survey was issued to tourism businesses in Moray in April. The survey was sent out to:

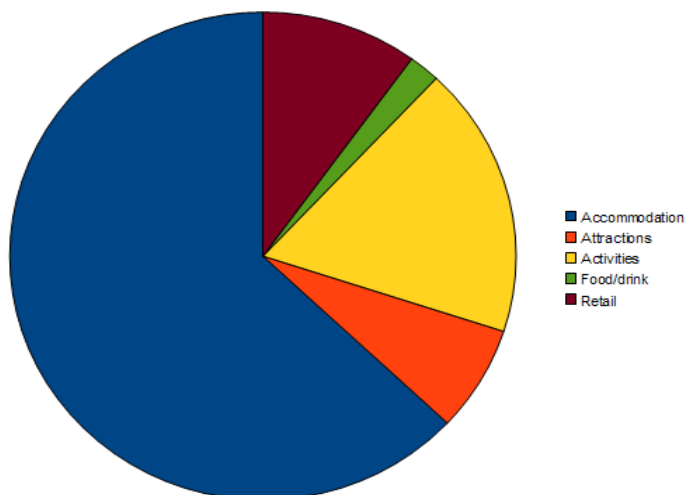
190 Accommodation providers (35 responded, 18%)
137 Attractions/Activities (14 responded, 10%)

The responses by Moray area:

38% Speyside (incl Tomintoul, Glenlivet, Archiestown, Rothes, Craigellachie, Dufftown)
25% Elgin (incl Alves, Burghead, Hopeman, Lossiemouth)
23% Forres (incl Findhorn, Dyke, Brodie, Rafford, Kinloss)
9% Buckie (incl Garmouth, Lhanbryde, Fochabers, Spey Bay, Cullen)
5% Keith (incl Newmill, Milltown, Auchindachy)



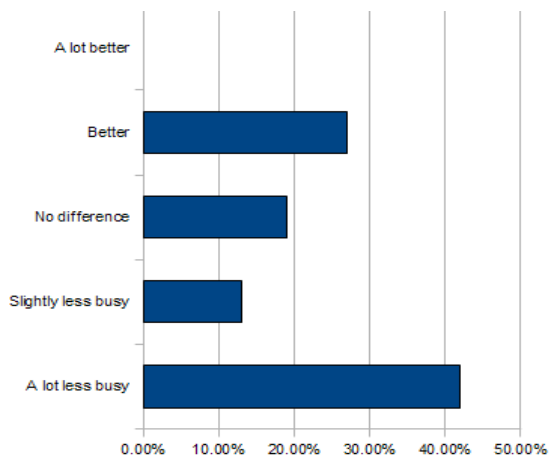
Most of the responses were from the accommodation sector (63%) and within this group the B&B's/Guest houses were the largest group (60%) Self catering was also well presented with 29%. Disappointingly, hotels only made up 9%.



Business Levels

Occupancy levels of the accommodation sector was poor due to the extreme weather conditions which lasted until well over the Easter period.

For the whole of Moray the results were:



The breakdown per ward sees that the Elgin area (62%) and Speyside (57%) area saw the biggest drop in visitor numbers. Forres area saw a drop in occupancy of about 42%

The figures coming back from the Buckie and Keith area were too low to be included and need to be adressed for the next survey.

The results coming back from accommodation businesses was very diverse and whilst some businesses in a specific town reported a huge drop in visitor numbers (-60%) other businesses reported an improvement of 40 to 50%.

Again that might have to do with new business start ups.

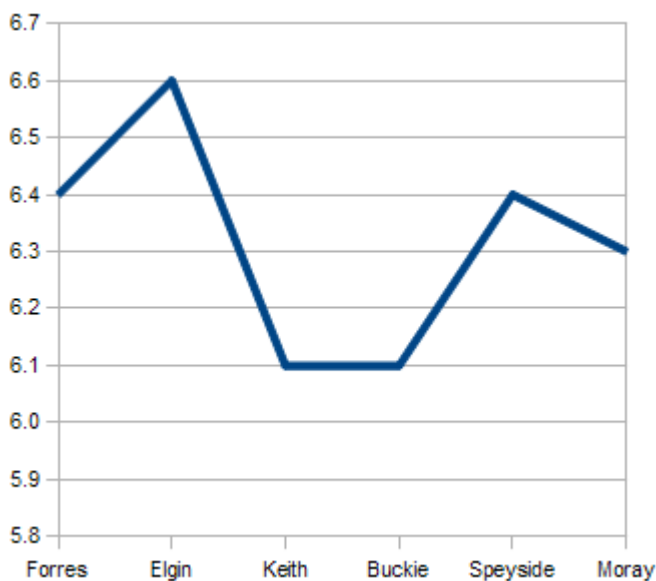
The breakdown of type of customers in the Moray area was:

Business: 68%
 Leisure: 27%
 Other: 5%

This is a rough estimate as most businesses are not actively measuring this type of data.

Business confidence

Business confidence is a measure of the level of confidence business owners have on how well they will do this tourism year:



The Elgin area although hit hardest, sees most confidence (6.6) on a scale of 10.

Keith and Buckie have less confidence although not far off from the others.