



**A STRATEGY and ACTION PLAN
for SUSTAINABLE TOURISM
2011-2016**

Final Version as Submitted to EUROPARC
21 January 2011

CONTENTS

1	INTRODUCTION	1
2	ASSESSMENT	3
2.1	Economic, social and environmental context.....	3
2.2	Tourism facilities and services	5
2.3	Tourism performance and visitor response	10
2.4	Enterprise needs and aspirations	11
2.5	Progress since 2005	13
2.6	External influences on the market and product.....	14
2.6	SWOT analysis	15
3	STRATEGY	17
3.1	Policy context.....	17
3.2	Aims and vision.....	19
3.3	Key principle and strategic objectives	20
3.4	Priority markets	25
3.5	Framework of areas for action.....	26
4	ACTION.....	28
1	Stakeholder engagement and working together	28
2	Brand awareness and marketing	30
3	Information and interpretation.....	33
4	Resource management and conservation	35
5	Outdoor access	38
6	Product diversification and distinctiveness.....	40
7	Business support and investment.....	43
8	Knowledge gathering and sharing	46
5	IMPLEMENTATION.....	48
5.1	Delivering annual action plans	48
5.2	Key players in implementation	48
5.3	Monitoring and renewal.....	49

Acknowledgements

The CNPA commissioned The Tourism Company to produce the draft Sustainable Tourism Strategy and Action Plan under the guidance of the Cairngorms Sustainable Tourism Forum.



1 INTRODUCTION

The Cairngorms is a major destination for tourism in Scotland. The area has a long tradition of welcoming visitors and contains some of Europe's finest landscapes and a rich biodiversity and cultural heritage. Its designation as one of just two National Parks in Scotland underlines its importance as a special place to protect and to enjoy.

Likewise, tourism is critically important to the area, providing the major source of income and employment. Nowhere else in Scotland is it more important to the local economy.

For these reasons, it is essential that tourism in the Cairngorms is promoted and managed wisely and effectively. This is the purpose of this strategy and action plan.

Building on the last five years

In 2005 the first Strategy and Action Plan for Sustainable Tourism in the Cairngorms was published. This new strategy builds on that foundation. It does not represent a major departure from the approach outlined then, but provides a complete revision and redevelopment, clarifying priorities and renewing the action plan in the light of the challenges and opportunities foreseen in the coming five years.

Much has been achieved since 2005. In particular, we can point to:

- Greater awareness of the Cairngorms National Park supported by a strong logo and active brand management.
- Stronger engagement, coordination, and representation of private sector tourism enterprises at the Cairngorms level, through the advent of the Business Partnership covering the whole area.
- Ongoing private sector investment in facilities and services.
- A stronger Cairngorms National Park presence on the web and in other media, including local visitor centres.
- Interpretation guidance in place, reflected in new Park information and orientation materials and take up by others.
- A more strategic approach to outdoor access, including the identification of core paths and improvement of routes, working with local land managers, rangers and other stakeholders.
- Training and networking support provided to businesses and communities engaging in tourism.

A framework and guideline for all

This strategy and action plan has been prepared for all those involved and interested in tourism in the Cairngorms and should provide a common agenda for everyone to follow. While the Cairngorms National Park Authority (CNPA) and the Cairngorms Business Partnership (CBP) are clearly key agents in its delivery, it should apply equally to the local authorities in the area, local business groupings, local communities, land managers, conservation interests and individual enterprises.

In order to reflect this wide range of stakeholders, a Cairngorms Sustainable Tourism Forum (CSTF) has been established for the Cairngorms, taking on the mantle of the VISIT forum from 2005. The CSTF will have the responsibility of ensuring agreement to the strategy and overseeing its implementation.

Meaningful sustainability

This is a strategy for sustainable tourism. The UN World Tourism Organisation defines this as: “*tourism that takes account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities*”

Increasingly, such an approach is becoming mainstreamed in tourism. It is clearly highly important for the Cairngorms with the close interdependency of the success of tourism and the quality of the environment in this area.

To be sustainable, tourism needs to be competitive and profitable as well as environmentally and socially responsible. It is important that the terminology should not get in the way here. Sustainable tourism essentially means good, successful and beneficial tourism – a concept relevant to everyone.

European recognition

Based on the 2005 strategy, the Cairngorms was the first UK national park to be awarded the European Charter for Sustainable Tourism in Protected Areas by the EUROPARC Federation. The Charter is increasingly seen as setting a standard for good practice in sustainable tourism and now applies to over 80 protected areas across Europe. The principles of the Charter are listed on page 19. This new strategy provides the basis for re-awarding the Charter to the Cairngorms.

How was the strategy prepared?

The strategy has been based on extensive research and consultation, including:

- Working through previous and current policy documents, research studies and reports
- Analysing existing product and market data
- A visitor survey conducted in 2009/10
- An on-line survey of tourism enterprises, achieving 90 completed responses
- A stakeholder workshop held on 23 June 2010 at the Lecht Ski Centre
- Structured interviews with key representatives of public, private and voluntary bodies
- Consultation on a draft strategy and action
- A Strategic Environmental Assessment of the draft strategy, pursued in parallel.

The strategy has been prepared in parallel with work on a new Cairngorms National Park Marketing Framework.

What does this document contain?

The document is in three main sections: an assessment of the current position; a presentation of the strategic approach and objectives; and an identification of priorities for action.

2 ASSESSMENT

This section summarises the findings of the research and consultation undertaken. It looks first at the general context for tourism in the Cairngorms and then considers how tourism has been performing, the profile and reaction of visitors, and the needs and perceptions of enterprises. Following a wider look at external factors, it ends with a summary analysis of strengths, weaknesses, opportunities and threats.

While the material concentrates on the current situation it also refers to changes since the previous strategy in 2005.

2.1 Economic, social and environmental context

Economic profile

The economy of the Cairngorms is inextricably linked to the area's natural assets. The quality of the scenery and the natural environment is crucial not only in terms of sustaining the tourism industry, but also supports and is supported by activities such as forestry, farming and field sports.

The Economic and Social Health (ESH) report carried out for the CNPA in 2009/10 states that 'the structure of the Cairngorms economy is highly unusual with a distinctive mix of industries – whisky production, forest products, sporting estates and agriculture as well as some of Scotland's most tourist-intensive areas and, increasingly, new creative industries.

Tourism is the single most important sector, accounting for almost 30% of all value added created in the park (£115m) and employs around 3600 people. The ESH report estimates that of the 197 industries which exist in the Park, 74 have some relationship to tourism. According to this analysis, tourism contributes more to the economy in the Cairngorms than in any other part of Scotland, with Badenoch and Strathspey being the most tourism intensive area.

Approximately 70% of the Cairngorms National Park is in agricultural use and although this is not as important as tourism in terms of employment generated, it is key to sustaining the resource and its impact on the landscape is significant. Increasingly, estates and farms have diversified their activities into recreation, tourism and conservation sectors.

The ESH report identified an emerging cluster of economic activity which provides a potential new dimension to the economic context. There is evidence that the region is becoming an attractive base for 'new' industries and a cluster of creative, media and knowledge based industries contributes around £4m added value each year.

Social issues

The provision of affordable housing for local residents continues to be a key issue in the National Park. Although some headway has been made in terms of the sustainability of new housing and increasing the availability of privately rented

affordable housing, aspirations to increase the amount of affordable housing have been thwarted by the economic downturn. Housing therefore continues to be an issue affecting the labour force.

The high proportion of second home ownership in some areas, including use of some new housing provision for second homes, has been raised as an issue during consultation. This influences house prices, availability of housing and community life. It is unclear whether this is a problem related to tourism.

The population of the Cairngorms is already on average much older than elsewhere in Scotland and like many other rural areas there is significant out-migration of older teenagers seeking education and opportunities. That said, the ESH report states that currently at least 250 more people become residents in the Park than leave each year, with most of these being of working age.

The area is generally affluent and scores well in the index of social deprivation for income, employment, health, education, skills and training. However, in terms of access to services it scores poorly and those without cars are liable to suffer considerable social disadvantage.

Natural and cultural heritage

The Cairngorms National Park is Britain's largest national Park, covering 4,528 sq km. The Park contains four of Scotland's five highest mountains and the montane zone above 600m is the largest area of arctic mountain landscape in the British Isles. The lower areas include some of the most extensive areas of natural and semi-natural forest in the UK, two of Scotland's premier rivers (the Spey and the Dee), many scenic straths and glens and a number of lochs, some of which are used actively for water based recreation.

The Cairngorms contains 25% of Britain's threatened species – two thirds of these are of Europe-wide importance. A significant proportion of the land area within the Park has a natural heritage designation. It is one of the best places to see the Scottish crossbill, red grouse, golden eagle, osprey, dotterel, capercaillie, and crested tit and is home to a wide variety of mammals, including pine martens, red squirrels, wildcats, water vole and otters. This richness provides a clear tourism opportunity as well as a major responsibility for effective conservation and management. A significant number of wildlife related attractions, reserves and guide-based activities adds to the resource.

Tourism activity can adversely affect habitats and landscapes. Comprehensive, documented evidence on the extent and nature of such negative impacts of tourism in the Cairngorms is limited although some impacts, such as path erosion, have had significant research. However a number of concerns were expressed during the consultation that deserve further investigation and consideration. The 2005 strategy identified some problems arising from the pressure of large numbers of car borne visitors in certain parts of the park, including access to winter sports facilities, the erosion of certain paths as a result of the extent of use, and ongoing fire risk. These issues continue to be of concern to some people. Some additional problems raised during consultation on this strategy include:

- The impact of dogs, walkers and cyclists on ground nesting birds and especially on capercaillie

- The impact of group events, such as outdoor challenges, on conservation and land management interests and other users, notably on the sensitive plateau
- Irresponsible wild camping as a problem in certain glens and upland areas
- The growth of mountain biking causing erosion on some paths
- General concerns about pressure on land and water in the Glenmore area

Another type of concern is the impact of developments on the landscape, some influenced by tourism and some more general, which are potentially damaging to its visitor appeal. Examples raised include housing developments, roadways and tracks in the mountains, and windfarms and powerlines – including those outwith the Park but visible from it.

The Cairngorms has relatively few significant historic heritage sites. However, the Victorian heritage and Royal connections on Deeside and the concentration of whisky distilleries in the north and west of the area provide very strong visitor appeal. More generally, aspects of historical and living heritage are brought out through a number of small heritage museums, historic buildings, events and themed trails. Since 2005 more work has been undertaken to support local communities understand, conserve and enjoy their local cultural heritage. The interpretation guide, *Sharing the Stories of the Cairngorms National Park*, produced in 2008, shows how the area's cultural richness can be brought to life through people.

2.2 Tourism facilities and services

Accommodation

There is no comprehensive database on accommodation in the Cairngorms, although accommodation audits have been carried out for individual areas that include parts of the National Park. The VisitCairngorms website lists 551 accommodation enterprises (which include members of the CBP as well as other non-member enterprises). The DiscoverRoyalDeeside website lists 165 accommodation enterprises. Many enterprises may be on both sites. There are 436 accommodation enterprises in the Cairngorms which are Quality Assured by VisitScotland. Inspection of these data shows that:

- There is a roughly even mix of serviced and self-catering enterprises.
- The number of Quality Assured self catering enterprises, hostels and caravan/ camping sites has increased significantly since 2005 and there has also been a small increase in B&Bs, but the number of QA hotels is slightly down. This may reflect both changes in participation in the scheme as well as changes in accommodation stock.
- Quality grading is quite high, with most properties achieving a 3-star rating or higher.
- There are 47 properties in the Green Tourism Business Scheme, the majority (60%) at silver standard with 15% gold.

Evidence from consultation suggests that quality of accommodation in the area is quite patchy. There are many small lifestyle businesses, some run well but others with low professional skills. The relative scarcity of sizeable, high quality independently owned and managed hotels is a weakness.

Visitor attractions

Over 100 attractions are listed on the Visit Cairngorms website. 24 attractions were covered in the VisitScotland Attractions Monitor in 2009. This showed five attractions receiving over 100,000 visitors per year, with a further five receiving over 50,000. A significant number of the attractions in the National Park (62) are members of the Visit Scotland Quality Assurance Scheme.

Attractions are located throughout the park, although there is a more dense concentration in and around Aviemore and Grantown on Spey.

The quality and range of attractions is a strength, providing a variety of interest and activities for the whole family. These include heritage and wildlife attractions, theme parks, transport related attractions and estates providing a portfolio of activities. There are eight distilleries open to the public and the Whisky Trail is promoted throughout the Park. The extension of the Park to the south brings in Blair Castle as a major, long established attraction and a new focal point.

There are also a number of folk museums and heritage centres although there is some evidence of smaller attractions, including heritage ones, being under financial pressure.

Outdoor sport and recreation

The Cairngorms is a major centre for a wide range of outdoor activities.

Skiing continues to attract a winter tourist and day visitor market and three of the five Scottish ski areas are located within the Park (Cairngorm, Glenshee and the Lecht) attracting around 80% of the Scottish ski market. However, the resorts are extremely vulnerable to climatic conditions. Mild weather in the 06/07 saw half the number of skiers than in previous years, but there have been good seasons since then. So, while snowsports and skiing will continue to be an important part of the area's activity portfolio, there remains an underlying instability amongst operators.

Traditional field sports, including shooting and deer stalking, are available on a number of estates and provide a significant income to the area each year. Game fishing is a further strength and both the Spey and Dee have long standing reputations as fishing rivers.

In recent years the range of outdoor activities has continued to grow and this is now a major strength of the Cairngorms. These include: watersports (with major centres at Loch Morlich and Loch Insh); canoeing; rafting; canyoning; wildlife safaris; winter and summer climbing; horse riding; bushcraft; clay pigeon shooting; and archery; amongst others. Mountain biking, in particular, has seen recent investment and fast growth, with some provision of dedicated routes such as at Laggan and the ski centres.

A number of estates and local operators offer a sizeable menu of activities to choose from and there appears to be a strong demand for multi-activity offers, including from a novice and family market.

A new initiative since 2005 has been the establishment of the Cairngorms Outdoor Activity Providers group. It had 22 members in 2010 and was seeking to attract more

from across the Park. It has established a code of conduct and a marketing programme linked to the Cairngorms brand. An Outdoor Activities Forum has been proposed for Royal Deeside.

Walking and countryside access

The Cairngorms offers a wide range of opportunities for walking, ranging from shorter, low-level walks around the key population centres to high-level treks for experienced walkers, including some of Scotland's most challenging high-level walking in the Cairngorms central massif. The 49 Munros in the Park are an additional draw.

Many publications and websites contain information about walks in the Cairngorms. For example the Walk Highlands website provides details of over 100 walks in the National Park, ranging from 1.5km to 42km. These are fairly evenly spread throughout the Park and include the easiest and most difficult gradings.

One official Long Distance Route (LDR) passes through the National Park – the Speyside Way (105km from Buckie on Moray Coast to Aviemore). Another four promoted and signed long routes pass through the area; Badenoch Way, Dava Way, CATERAN Trail and Deeside Way. In addition to these there are a number of traditional routes, unsigned routes, which pass through the mountains.

There are a number of walking festivals in the National Park – for example in the Angus Glens (June), Ballater (May) and Tomintoul and Glenlivet (September).

Although the Cairngorms is better off for provision for cyclists than many other parts of Scotland, dedicated off-road cycling routes remain limited.. However two recently completed off-road trails, on Deeside and between Aviemore and Glenmore have added to the resource.

The Cairngorms Outdoor Access Strategy produced in 2007 established priorities for: improving infrastructure; stimulating responsible behaviour; improving visitor information; linking to sustainable transport; and promoting access as part of the health agenda. Action has been pursued in all these areas.

A key step forward has been the Core Paths Plan which identifies 932km of routes based on extensive consultation including tourism interests. Work is being undertaken on path improvement and information. Issues remain with the promotion of the paths and achieving the right balance with respect to mountain access.

A range of implementation mechanisms have been pursued, including working through the Cairngorms Outdoor Access Trust and Local Outdoor Access Forum, and supporting individual communities on path identification and information. The Ranger services also play a critical role in facilitating responsible access and have now been more coordinated across the National Park within the Cairngorms brand.

Events

A range of events take place across the National Park throughout the year. Many of these are outdoor events such as walking festivals, sporting events (cycling, running etc) and highland games. There are also a number of small live music and cultural

events. The most high profile event is the Braemar Gathering in September, which is well-known for its royal connections.

A number of websites contain information on events and there is a new Events and Festivals Co-ordinator for the area. A free 'What's on in Aviemore and the Cairngorms' is published monthly by the CBP and available online. The Discover Royal Deeside website includes information on events.

Recent years have seen considerable growth in the number of event organisers wishing to hold events – particularly sporting challenges – in the Park. In some cases this has caused conflict with land managers, conservation interests and other users and the CNPA has produced guidance with partners for outdoor events to help organisers, land managers and other interested parties work together.

Food, crafts and retail

There is a burgeoning creative sector in the Park, reflected in the number of galleries now open to the public. Ten galleries across the Park are now listed on the Visit Cairngorms site. There are also a number of potteries and artists' studios that sell craft items direct to visitors.

Creative Cairngorms is a group of local artists based in the Park whose aim is to increase knowledge and understanding of the arts within the National Park environment. There are currently around 50 members including painters, photographers, sculptors, ceramicists and others and the organisation now has semi permanent exhibition space at the Speyside Heather Centre at Dulnain Bridge. Creative Cairngorms produces a brochure on behalf of its members and attends local shows. A new website, with e-shop, is about to be launched.

There are many places to eat and drink in the Cairngorms including restaurants, cafes, tearooms, inns and pubs. Some offer local produce, however this is not yet widespread and is not well promoted across the Park as a whole. The Royal Deeside and the Cairngorms DMO has made local food a key theme of its marketing, including the launch of a Royal Deeside Larder Food Brand. Some of the estates such as Rothiemurchus and Alvie sell their own produce – game, venison, fruit etc – in their own outlets and some local shops however there is no Cairngorms-wide branding for local food and awareness is generally low.

Under the auspices of the National Park, a Cairngorms Farmers Market has been established. The market takes place on Sundays in either Aviemore or Grantown. A list of local producers has also been published and is available in Visitor Centres and around the Park.

Development and coordination of work to promote local produce is being pursued through a Food for Life Project, with some early project work seeing the creation of food and drink directories and guides for the catering industry and the visitor.

Transportation

Transport connections to some parts of the Park are relatively good compared to many other upland areas of Scotland. The western and southern fringe of the Park is served by the A9 corridor and main north-south railway line. Deeside is directly

linked to Aberdeen, with regular bus services to Ballater and Braemar. Other areas are more isolated.

Getting around by public transport within the Park is more difficult. The Cairngorms Explorer brochure gives an overview of bus routes and times and goes some way in providing visitors with information on public transport options. Transport information is also available on visitcairngorms.com. However, there are many gaps in the service, notably between the west and east sides of the Park. The Heather Hopper, which operated from 2005 to 2008, sought to address this issue but was discontinued due to lack of demand.

Cycling is primarily pursued as an 'experience' rather than a means of transport and there are significant barriers to visitors coming on bike, particularly the lack of facilities on trains and buses to accommodate them.

Marketing and information services

The Cairngorms National Park brand and logo has been well established and the latter is widely visible across the area. Brand guidelines have been developed. Tourism enterprises can display the logo provided they demonstrate adherence to brand requirements relating to quality and sustainability. Those that do so are provided with a pack of materials.

The website of the Cairngorms Business Partnership www.visitcairngorms.com covers the whole area and has extensive product information on the Cairngorms National Park. A limited amount of promotion of the area as a whole has been undertaken, mainly PR, but further activity is being addressed in a Cairngorms National Park Marketing Framework.

The Royal Deeside and the Cairngorms DMO has a website (www.discoverroyaldeeside.com) and marketing strategy focussing on the eastern Cairngorms with Deeside and Donside. A number of other organisations are involved with destination marketing and management for parts of the Park, which may include wider areas outwith the Cairngorms. These include Tomintoul and Glenlivet Highland Holidays, Speyside and Moray Coast DMO, Highland Perthshire DMO, and Angus Council.

VisitScotland produces a destination guide and has a dedicated section on the Cairngorms on their main website.

A range of information print is produced by the CNPA, which is increasingly to a standard format using established design guidelines. Identity signing for the national park has been established and systematically installed. An interpretation guide, *Sharing the Stories*, has been produced for use by a wide range of information providers. Work has been undertaken with communities on their own interpretative plans and the creation of local information boards which also carry Park information and messages.

There are nine Visitor Information Centres in the Cairngorms, mainly coming under the aegis of VisitScotland. A programme of work has been undertaken to upgrade them and to introduce strong Cairngorms National Park branding together with dedicated racking of information. Work has also been done to upgrade ranger bases as a source of visitor information.

2.3 Tourism performance and visitor response

Information on tourism performance and visitors to the Cairngorms is available from a range of sources, including the visitor survey in 2009/10 (which can be compared with the 2004 survey), the survey of enterprises in 2010, annual STEAM (tourism economic model) data, VisitScotland figures for attraction performance, the CBP's Business Barometer and stakeholder consultation.

Growth trends

According to the 2008 STEAM report commissioned by the CNPA, there were 1.48 million visitors to the National Park in 2008. This was slightly down on the 1.5 million estimated for 2007, but shows an increase of nearly 3.5% on the number of visitors in 2003, which was 1.43 million.

Evidence from a range of sources suggests that the overriding trend in tourism overnights and day visiting is positive:

- Average length of stay in serviced accommodation has risen from 1.7 in 2003 to 2.1 days.
- 44% of enterprises surveyed in 2010 felt that their business had grown over the past three years.
- The Business Barometer showed most businesses seeing high season growth (comparing summer 2009 with summer 2008), though off-peak periods and 2010 in general were more static.
- From a list of 24 Cairngorms attractions, two thirds had seen growth in visitor numbers between 2005 and 2009 and for most of these it had been quite strong (more than 5% per annum)
- The growth in visitor numbers between 2008 and 2009 for most attractions was higher than the Scottish average of 3.5%.
- After a bad winter season in 2006/7, the area has seen some of the most successful ski seasons in 2008 and 2009.

There is some evidence to suggest that the average spend per person per day was lower in 2009/10 than in 2004.

Visitor profiles

The 2009/10 visitor survey and Business Barometer indicate that:

- The domestic market predominates (over 80% of business) but the overseas market is important especially amongst longer holiday takers (43%). The Business Barometer confirmed that overseas visitors may account for 20% of enterprise markets.
- The Scottish market is important, notably in the non-summer months.
- Approximately 20% of visitors are on day trips, 30% on short breaks and 50% on longer holidays.
- Couples (46%) and families (32%) are both important.
- Age ranges of visitors are relatively evenly spread – the area appeals to all ages.
- According to businesses, first time customers tend to outnumber repeat visitors. Comparing the two visitors surveys, the proportion of first time visitors was significantly higher in 2009 than in 2004.

- The main activity is sightseeing (over 50%). Of those on long holidays: 41% went on low level walks; 33% visited attractions; 25% observed wildlife; and 16% went on high level hill walks.
- The pattern of visiting remains highly seasonal. Most visitors come in August, followed by July, June and September.
- Over three quarters (78%) used a car to get to the area, which is unchanged on 2004.

Visitor motivations and reactions

- The quality of the landscape dominates as a reason to visit and in terms of the aspect most liked.
- There is a noticeably stronger awareness of the area as a National Park in 2009/10 (82%) compared with 2004 (69%) and over half (54%) said this was important in their reason to visit (25% in 2004). 48% could describe the national park logo without any visual prompt.
- A large majority (84%) said information on the Park was easy to find (38% in 2004). TICs scored better in terms of customer feedback than five years ago and are the main sources of information when in the area (albeit only visited by 35%).
- In general, visitor satisfaction is very high and in most areas is marginally higher than in 2004. 88% said that the National Park seems well managed and cared for (74% in 2004) and 90% agreed that there were plenty of things to see and do.
- The only elements where significant percentages of people rated services as average or poor were retailing and service in pubs and restaurants.

It is important to note that visitors had quite varying expectations of the national park. Faced with a range of statements, the most frequently chosen descriptor was 'a tranquil, unspoilt wilderness area where conservation is the key aim' (36%) but an almost similar proportion opted for 'an area with numerous kinds of attractions' (32%). The majority (82%) felt that it would be good if the area attracts lots of visitors.

2.4 Enterprise needs and aspirations

An insight into enterprise perceptions is available from the enterprise survey and business barometer.

Economic performance and outlook

While many enterprises have seen positive recent growth, there is clearly a need for more business, with 30% saying that this is necessary for viability and a further 40% needing more business in order to achieve a reasonable profit.

Most enterprises are seeking more tourists out of season. The main months where more business is sought are March (by 66%) and November, followed by October, December, February and April. However, even in August 21% of enterprises are looking for more business.

Despite these expressed needs, the business barometer has recorded reasonable levels of accommodation occupancy, although there is considerable variation between enterprises.

Most businesses have seen cost increases and expect still higher costs in the upcoming year, notably in supplies.

The business barometer indicates a reasonably positive approach to investment by businesses in the last year, with between 30% and 40% seeing an increase in their level of investment in infrastructure and marketing compared with the previous year. However, they were far less likely to have invested more in staff training. In all aspects they tend to believe that they will invest more in the year to come, suggesting a positive outlook, but there are some signs of a recent dip in business confidence.

Barriers and influence on business

The business barometer has consistently shown 'bureaucracy' as the most often quoted barrier to growth and almost half the respondents to the enterprise survey pointed to regulations on business as an important barrier.

The enterprise survey found that lack of tourists and market growth was an equally important barrier, and the barometer has often shown tourism trends as a clear restraint.

Operating costs are also an ongoing concern and have been growing. However the enterprise survey found that few enterprises were held back by inability to recruit staff (although most respondents were small or micro businesses). Provision of accommodation for staff has been reported as a problem for some enterprises.

Lack of capital and credit appears to be a less important barrier and only a quarter of businesses indicated that planning restrictions on new development was a factor in their performance and growth. However, seen as a percentage of those who may be considering investment and physical expansion these are significant issues.

The business barometer has continued to show that the presence of the National Park has been a positive influence on business, notably in attracting first time customers. This was confirmed by the enterprise survey, in which two thirds said that national park status was quite or very important in attracting their visitors.

Branding and marketing activity for the Cairngorms was seen by a small majority of enterprises as quite good but with some room for improvement, whereas around a third found it poor, believing that it needs to be a lot more effective. Websites, advertising and visitor centres are seen as the most effective channels.

Most enterprises responding to the survey had already taken some action in the area of environmental management, with around 80% using local produce and engaging in energy saving and waste reduction, although the level of this activity was not ascertained. Fewer enterprises were supporting local environmental projects or the use of public transport, but a majority were interested in these issues and a number not previously engaged were planning to take relevant action.

Priorities for the destination

Enterprises were asked a range of questions about the level of importance for their businesses that they placed on different priorities and actions for the Cairngorms. Some key results are:

- Highest priority was given to the environment, including conserving the area's landscape and wildlife, encouraging visitors to do so, and improving visitors' understanding of the impact of their behaviour.
- The second most important priority was seen as attracting more visitors to the area in general. This was scored equally highly as attracting more visitors at certain times of the year.
- Improving visitor information pre-arrival was a high scoring priority and seen as slightly more critical than post arrival information (though the latter was still important)
- Other issues scoring quite highly included spreading visitors to different areas of the park and improving or better promoting public transport.
- There was general support for different kinds of product development and improvement, notably interpretation and promotion of wildlife, followed by events, attractions, local produce, walking, cultural heritage and recreational activities.
- There was considerable support for strengthening local tourism bodies and associations as well as a call for improved communication of National Park policies and initiatives.

2.5 Progress since 2005

It is important to consider the extent to which tourism in the Cairngorms has met the requirements set out in the previous strategy.

The CNPA undertook a detailed review of activities carried out against each element of the action plan that supported the strategy. In almost all cases, relevant action could be identified, some quite substantial.

The 2005 Sustainable tourism strategy contained the following statement of expectations for 2010.

“The Cairngorms is a leading National Park in Europe for its sustainable management of tourism and the quality of the visitor experience. People come to the Cairngorms year round, to enjoy the fine landscapes, appreciate the wildlife, heritage, and character of the place and engage in a range of activities. They are fully aware of what the Cairngorms area has to offer, understand the importance of the conservation of the Park and are keen to support it. Tourism businesses feel part of the National Park, are benefiting from it, are offering a quality experience to visitors and are engaged in environmental management. Many visitors are arriving and moving around without a car. Local communities feel happy with the level of tourism in the area and feel involved with the National Park in its management. Checks are kept on the performance and impacts of tourism, and although the former has been improving it has not brought adverse changes to the environment or local quality of life.”

The results of the various surveys and stakeholder consultation suggest that some of these aspirations are on the way to being achieved, while with others there has been less progress.

- The greatest progress appears to be in the presence and profile of the National Park and the awareness of it by visitors, facilitated by the brand.
- Trends in visitation are upwards and many people are coming because of the landscape, natural heritage and other special qualities. There appears to have been some growth out of season, but seasonality remains a problem. There has been no change in the use of public transport.
- The enterprise survey also indicated that many of them do now relate quite strongly to the park. Collectively, the advent of the Cairngorms Business Partnership as a key private sector body based on the Park is a major step.
- Involvement of local communities remains patchy, but some have been supported by local schemes and interpretation and in that way are involved in tourism management in the park.
- There has not been sufficient monitoring to provide definitive statements about impacts. However, in general there does not appear to have been an increase in adverse impacts on communities and the environment, apart from some concerns listed earlier.

2.6 External influences on the market and product

It is important for the tourism strategy to look externally at a range of factors that are influencing the market and potential response from destinations. Some are summarised below.

Recession and domestic holidaymaking

The economic recession and public sector cuts will have an effect on the supply and demand of tourism over a number of years. On the supply side, restrictions of public sector spending on infrastructure, marketing and business support point to the need to strengthen engagement by the voluntary and private sectors. On the demand side, there are signs that people are resisting losing their holidays but rather are changing their travel patterns, providing opportunities for the domestic market. However levels of spending per head may reduce, with an increase in interest in less expensive facilities offering good value.

Population dynamics

The UK population is growing slowly but becoming older. Empty nesters of the baby boom era have been brought up to travel and will be reluctant to give this up, but may have to work longer to fund their retirement and have more limited discretionary spending power.

The search for activities and experiences

Attitudes towards holiday taking are changing and consumers are wanting to get more value out their leisure time and pack more in. There is a trend to being more adventurous on holiday, seeking and trying out new activities, including different outdoor sports as well as walking and cycling. Some people are looking for experiences tailor-made to their own interests, even within the same family group.

Green and ethical influences

There has been a rise in the ethically motivated consumer and an increased interest in environmental issues. People want to feel good about their choices. In only a small minority of cases is environmentally and socially responsible travel dictating holiday choice, but for many it is now an additional factor taken into account when

other needs are met. More directly, there is a notable increase in positive interest in wildlife, part stimulated by media coverage.

Local distinctiveness

In the face of globalisation and concentration, visitors are likely to become more attracted by destinations that can demonstrate their differences and special qualities and which offer visitors the opportunity to experience them. On the other hand, brands are becoming increasingly important, conveying messages quickly and providing reassurance and familiarity in an era of seemingly limitless choice. This points to the need for brands which convey locally distinctive values

The evolving internet

The internet now dominates holiday choice and information delivery. The growth of Web 2.0 technology, travel networking websites and social media have important implications for customer feedback, reviews and broadening the scope of 'word of mouth' marketing.

Mobile technology

This provides a new dimension for more instant information delivery within the destination as well as ways of enhancing the visitor experience through creative interpretation applications. Lack of fast broadband can be an issue in some rural areas.

Climate change

Extremes and unpredictability of weather conditions will affect basic conditions for tourism. Snow quality may be particularly affected. This can have a positive or negative impact on different seasons, altering travel patterns. The effect of mitigation policies and measures, including meeting national carbon reduction targets, will also influence supply and demand.

Barriers to travel

Traffic congestion will get worse which may result in an increase in travel costs through plans for road pricing and other initiatives. The real environmental cost of flying may lead to further rises in fares and taxes which will affect both inbound and outbound tourism. As an antidote to this, 'slow travel' by public transport, on foot or by bike or horse may become an attractive proposition in its own right.

Competitive destinations

There is increasing competition in the UK and overseas between local destinations which have their own web presence. Those that are able to present strong brands and products, supported by partnership working between the public and private sectors, will be the most successful.

2.6 SWOT analysis

Based on the above assessment and knowledge and opinion gained from the consultation, the following summary analysis of the strengths, weaknesses, opportunities and threats for sustainable tourism in the Cairngorms over the coming five years is presented and should be reflected in the strategy moving forward.

<p><u>Strengths</u></p> <ul style="list-style-type: none"> • Magnificent scenery • High wilderness plateau • Extensive natural woodland • Straths, rivers, glens • Extensive biodiversity with easily seen iconic wildlife • NP Designation • Range of outdoor activities • Royal heritage and connections • Relative accessibility • Leading UK ski destination • Business Partnership • Ranger services/events • Strong logo 	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> • Quantity and quality of accommodation and catering • Divided area – physical, historic, institutional • Public sector coordination • Limited cultural offer • Housing for staff • Few large enterprises • Levels of professionalism and service • Public transport • Clarity of outdoor access opportunities
<p><u>Opportunities</u></p> <ul style="list-style-type: none"> • Developing NP awareness • Recognition of economic significance of tourism in the Cairngorms • Domestic market • Growing interest in environment/ wildlife • Growing interest in activities/ health related experiences • Search for authenticity and local distinctiveness • Public sector realignments and need to work together • Local sense of community as basis for action • National Park expansion • Policy focus on sustainable development 	<p><u>Threats</u></p> <ul style="list-style-type: none"> • Longer recession • Viability of enterprises • Public spending cuts • Continued divisions • Climate change – reliability of snow etc. • Impact of development and access on biodiversity and landscape • Impact of tourism on land management and other activities • Dependence on car based travel • Perceived inter-user conflict

3 STRATEGY

This section presents the overall strategic direction for sustainable tourism in the Cairngorms from 2011 to 2015, based on the assessment contained in the previous section and priorities raised during the consultation. It starts by summarising briefly the existing policy context. Next, it proposes the overarching aims and vision. Following this, the key strategic objectives are identified, which will direct the shape and approach to tourism during this period. Finally, a framework of action areas is outlined.

3.1 Policy context

A wide range of policies and strategies are relevant to this revised sustainable tourism strategy for the Cairngorms. In this brief summary, three key sets of policies are singled out as providing a particularly important context for the strategy.

Cairngorms National Park policy

The Scottish government's four **aims of Scottish National Parks** continue to direct overall policy:

1. To conserve and enhance the natural and cultural heritage of the area
2. To promote sustainable use of the natural resources of the area
3. To promote understanding and enjoyment (including enjoyment in the form of recreation) of the special qualities of the area by the public
4. To promote sustainable economic and social development of the area's communities.

The four aims must be achieved collectively and in a coordinated way, and it is the statutory function of the National Park Authority to ensure this collective and coordinated approach.

Current National Park policies are contained in the **Cairngorms National Park Plan 2007**. This identifies three strategic objectives: Conserving and Enhancing the Park; Living and Working in the Park; and Enjoying and Understanding the Park. The plan also has seven priorities for action. Tourism cuts across all of these objectives and relates to a number of the action areas. The plan has therefore proved difficult as a vehicle for driving and guiding tourism.

The vision of the National Park Plan, and one of the outcomes identified in it, refers to the Cairngorms being "an internationally recognised, world class sustainable destination" with fantastic opportunities for all to enjoy. This concept of a high quality destination provides an important basis for the new Sustainable Tourism strategy.

Work on the new National Park Plan is about to begin. This may follow a new structure, with one of the main components seeking a 'sustainable destination' and with tourism policies as articulated in this strategy relating directly to this.

The previous Sustainable Tourism Strategy 2005 did provide a valuable agenda for the CNPA to follow and has been taken fully into account in this new strategy. It was

less actively used by wider stakeholders and this should be rectified. The new strategy also seeks to identify some clearer headline objectives to shape future tourism.

Other national park policies and strategies have also been taken on board, notably the Outdoor Access Strategy which has a strong bearing on tourism.

The emerging Marketing Framework for the Cairngorms has been developed to dovetail with this strategy.

Scottish sustainable development and tourism policy

The **Scottish Government's vision** commits it to sustainable development: *“Economic development should raise the quality of life of the Scottish people through increasing opportunities for all, on a socially and environmentally sustainable basis.”*

Scotland's **Sustainable Development Strategy 2005** provides a direction. The 2009 review of the strategy recognises positive steps on climate change, waste, planning and food policy but underlines that the country has a lot further to go.

Tourism is well placed to deliver both economic development and quality of life, while respecting and helping to conserve the environment. The national tourism strategy A **Tourism Framework for Change** (2006) is fully a strategy for growth (seeking a 50% rise in tourism by 2015) but it also introduced a strong emphasis on sustainability, with an ambition for Scotland to become Europe's most sustainable destination. The review of the tourism strategy in 2009 confirmed this approach, calling for it to be embraced by the industry.

In 2010 VisitScotland produced a **draft Sustainable Tourism Strategy for Scotland** as a document for consultation. This is still being considered. It has nine strategic objectives, covering: reducing seasonality of demand; reducing the impact of tourism transport; minimising resource use and waste production; protecting and enhancing natural and cultural heritage; ensuring quality of life for communities; improving the quality of tourism jobs; making holidays available for all; adapting to climate change; and building an effective evidence base for sustainable tourism. Each objective has associated action involving engaging with visitors, businesses and other partners. The objectives and many of the actions are relevant to the national parks.

VisitScotland has been actively pursuing nature based and activity tourism. Research and guidelines in these areas provide an important context. Examples include an advisory guide on Adventure Travel in Scotland (2010) and research into the True Value of Wildlife Tourism, confirming it as a growing sector.

In 2010 VisitScotland established a new policy position supportive of local destination management and marketing bodies that are based on a partnership approach with a strong private sector engagement.

European policy and the Charter

The European Union's **Political Framework for Tourism in Europe** (2010) emphasises competitiveness plus sustainability of destinations. It calls for stronger images, product diversification and innovation in destinations and measures to

promote sustainability and tackle seasonality. It builds on its earlier work on sustainable tourism policy, which has been reflected by VisitScotland.

The **European Charter for Sustainable Tourism in Protected Areas** is recognised as an exemplary framework for sustainable tourism in destinations.

The Charter has two underlying aims:

- To increase awareness of, and support for, Europe's protected areas as a fundamental part of our heritage, that should be preserved for, and enjoyed by, current and future generations.
- To improve the sustainable development and management of tourism in protected areas, which takes account of the needs of the environment, local residents, local businesses and visitors.

This strategy has been designed to meet the requirements of the Charter which is already held by the Cairngorms. The Charter requires that each park has:

- A stakeholder forum to guide tourism, including representative of the park, tourism businesses, local communities and conservation interests
- A sustainable tourism strategy and five year action plan
- Actions which reflect the Charter principles.

The ten principles of the Charter are as follows:

1. To involve all those implicated by tourism in and around the protected area in its development and management.
2. To prepare and implement a sustainable tourism strategy and action plan for the protected area.
3. To protect and enhance the area's natural and cultural heritage, for and through tourism, and to protect it from excessive tourism development.
4. To provide all visitors with a high quality experience in all aspects of their visit.
5. To communicate effectively to visitors about the special qualities of the area.
6. To encourage specific tourism products which enable discovery and understanding of the area.
7. To increase knowledge of the protected area and sustainability issues amongst all those involved in tourism.
8. To ensure that tourism supports and does not reduce the quality of life of local residents.
9. To increase benefits from tourism to the local economy.
10. To monitor and influence visitor flows to reduce negative impacts.

The Charter also encourages protected areas to recognise tourism enterprises which pursue sustainability and are committed to the park's objectives and strategy.

3.2 Aims and vision

It is important to hold in mind the fundamental aims for tourism in the Cairngorms National Park. What is it that we are seeking tourism to deliver? This relates back to the four aims for Scottish national parks that were set out earlier. The overarching aims of this strategy for tourism in the Cairngorms are:

- To deliver and maintain a source of livelihood and economic prosperity for local communities
- To provide a fulfilling and rewarding experience for visitors, contributing to their health and wellbeing
- To maintain and help enhance the conservation and richness of the area's natural and cultural heritage.

This strategy also has a national aim, to strengthen, through tourism, the contribution of the National Park to Scotland's economy and social wellbeing.

Vision

The vision for tourism in the Cairngorms National Park builds on the concept of a quality destination, echoing that set out in the first Park Plan.

The Cairngorms National Park is a renowned world class destination, based on an exceptional visitor experience, well conserved natural resources and a diverse cultural heritage, supporting a thriving tourism economy that delivers year round jobs and prosperity across the area.

3.3 Key principle and strategic objectives

This is a strategy for sustainable tourism, endorsing the international and Scottish understanding of this as taking full account of its current and future economic, social and environmental impacts.

The following key principle and strategic objectives drive and shape the approach to tourism for the period 2011-15. These have been distilled from careful analysis and consultation. They respect the principles of the European Charter, listed earlier, but have been developed and expressed in a way that reflects current priorities in the Cairngorms.

Key principle

National Park = Opportunity + Responsibility

That the status of the Cairngorms as a National Park provides a powerful opportunity for developing and promoting its tourism proposition but one that is matched by a responsibility to deliver an exceptional experience for visitors and give high priority to caring for the environment

As currently one of just two National Parks in Scotland, the Cairngorms has an opportunity to assert its appeal as a destination that is not available to most other areas. It makes consummate sense to focus the development and promotion of tourism in the area on a National Park brand. Although national parks vary in type and definition across the world, the term is broadly understood to mean somewhere that has been singled out as a special place. Evidence gained from surveys amongst visitors and enterprises in the Cairngorms clearly points to the deepening awareness of the area as a national park and the potency of this in delivering visitors.

On the other hand, the term raises expectations. Successful destinations have to match up to what visitors expect to find or they will not stay long or return. Research has shown that visitors expect the place to be both an unspoilt wilderness area but

also one that offers lots to see and do. Different markets want different things, but above all there is a need to deliver a quality experience.

A second, equally important implication of the National Park as a basis for tourism is the need for all those benefiting from this status, such as the local tourism enterprises, to accept the responsibility it places on them to foster the area's special qualities and to play their part in conserving and enhancing the environment.

Strategic objectives

SO1: Tourism growth

To seek significant growth in the value of tourism generated and retained in the Cairngorms in the next five years, leading to an increase in the profitability of businesses and local prosperity

The need for many tourism businesses to see more growth in order to achieve sufficient profitability was shown in the analysis. The emphasis is placed on growth in value but this will also mean growth in volume of trips and nights and this is accepted and welcomed. The strategy embraces some key objectives to:

- 1a Grow year-round tourism.** Seasonality of demand should be reduced. This can be critical for profitability. It also can lead to sustainability benefits in terms of resource use. There is a particular need to generate more visits in late autumn and spring. It has implications for both marketing and product development.
- 1b Increase length of stay in the area.** It appears that many people stop off in the Cairngorms while in transit or on a wider tour. Some others use the Cairngorms as a base but may spend more time touring out from the area. While these visitors, as well as those on day trips and short breaks, are welcomed, all should be encouraged to stay longer locally on their current or subsequent visits.
- 1c Increase spend per head and income retained.** Gross value from tourism will be strengthened if spend per head on local goods and services is increased. This requires providing more opportunities and incentives for visitor spending and also strengthening the provision of services and supplies that come from the local area.

Outcome: Total tourism spending in the Cairngorms has increased at a rate over 35% higher than the equivalent rate for Scotland as a whole. Relative higher growth has been seen in spring and autumn compared with the summer. Average length of stay has increased by over 35%. There has been increased business turnover (including visits and occupancy) especially out of season, leading to increased profitability, confidence, levels of investment and year round jobs.

Indicators/ measurement¹:

- *Total tourism spending – Cairngorms and Scotland (STEAM figures)*

¹ The detailed measurement mechanisms will be developed with partners in conjunction with ongoing monitoring for the National Park Plan.

- *% enterprises reporting growth compared with equivalent quarter in previous year*
- *Attraction visitor numbers and accommodation occupancy levels*
- *% enterprises making investments c.f. previous year*
- *Enterprise feedback on profitability*

SO2: Customer focus

To ensure that the expectations and needs of all visitors to the Cairngorms are fully understood and addressed

There was a clear call during the consultation on this strategy for tourism in the Cairngorms to be more customer focussed. Although levels of satisfaction are high, there are still some areas where service delivery falls down.

This objective is particularly important for the economic success of the tourism sector in the area, including winning repeat visits, and relates closely to SO1.

The provision of products, services and information should be more alert and flexible to visitors' needs. This has particular implications for visitor feedback, market research and keeping abreast of how the Cairngorms compares with other destinations. This knowledge, linked to communication and training, should lead to increased professionalism in the sector and the way visitors are welcomed and treated.

This objective also requires that *all* visitors have a quality experience. The Cairngorms should be an inclusive place, welcoming and providing for the needs of a full diversity of visitors, whatever their background, age, race, social status, income or ability. The objective supports and builds on the Inclusive Cairngorms initiative and work to deliver a 'park for all'.

Outcome: General enhanced experience of the Cairngorms by all kinds of visitor, leading to greater visitor satisfaction and improved business performance.

Indicators/ measurement:

- *% visitors satisfied with experience in the area*
- *% visitors making repeat visits*
- *% enterprises collecting and acting on visitor feedback*
- *Records of relevant enterprise training*
- *% positive comments on user-generated response websites*
- *Feedback from different types of visitor in response to their needs*

SO3: Special qualities

To strengthen awareness and understanding of the special qualities of the Cairngorms and provide outstanding, distinctive experiences based on them

This objective is justified in a number of ways. Strengthening awareness and understanding in its own right meets one of the requirements and purposes of the national park. It is also highly relevant to securing more tourism benefit, given the clear market trend towards seeking destinations that are distinctive and seeking new, participatory experiences.

Distinctive and authentic experiences relating to the Cairngorms' special qualities can be found through a wide variety of outdoor access and recreational activity, discovery of the area's special landscapes and biodiversity and varied experiences of the area's cultural heritage.

Some of the area's special qualities have the potential to truly deliver tourism growth. A particular opportunity exists to position the Cairngorms as a leading destination for wildlife tourism, meeting growing market interest in this.

The objective has implications for marketing messages (from the destination and individual businesses), for information and interpretation, for the promotion as well as the provision of fulfilling outdoor experiences and for the type and range of new product development.

Outcome: There is a greater range and number of products and packages available covering different experiences in the Cairngorms. In general, visitors have more awareness of the area's special designation and qualities.

Indicators/ measurement:

- *Amount of different experiences/ offers featured on destination website(s)*
- *Audit of products and events*
- *Media coverage records*
- *% visitors aware of area as a National Park and of different aspects*
- *% visitors engaging in different activities during their stay*

SO4: Geographical diversity

To recognise and promote the individual qualities of the different parts of the Cairngorms, meet their needs and help them to benefit more from tourism

The Cairngorms is the UK's largest national park. The presence of the high plateau in its centre means that the constituent parts are widely dispersed. There remains considerable concern that a single platform for tourism, in the form of the National Park, will not recognise the needs of the individual elements, many of which have their own distinctive themes, traditions in tourism, support structures and links to adjoining non-Park areas.

This objective seeks to address this concern as a key priority of the strategy. It recognises that the Cairngorms National Park is relevant to all areas and can lend considerable strength to them. It endorses the marketing concept of 'one dish with five distinct flavours' (Badenoch/Strathspey; Royal Deeside and Donside; Tomintoul/Glenlivet; Highland Perthshire; and the Angus Glens).

A clear strategic requirement of the objective is to spread tourism across the Cairngorms, encouraging visitors to go to more than one area. It has implications for delivery structures, marketing, information, transportation and product development.

Outcome: All parts of the Cairngorms are well covered in marketing and have seen appropriate levels of new investment in tourism development and projects. Relatively greater growth in visitor numbers has occurred in

less visited areas. Enterprises, communities and representative bodies are satisfied with how their areas are presented and supported.

Indicators/ measurement:

- *Relative amount of space devoted to different areas in Cairngorms communication material*
- *% visitors spending time in different parts of park during their stay*
- *Visitor numbers at attractions across the park*
- *Occupancy levels at accommodation in different areas*
- *Product audit and record of new development/ projects in different areas*
- *Feedback from enterprises, DMOs, communities across the park*

SO5: Environmental impact

To minimise negative environmental impacts from tourism and gain support for the conservation, management and enhancement of the Cairngorms' natural resources and heritage

This objective expands on the concept of tourism's responsibility towards the natural resources, environmental quality and biodiversity of the National Park as articulated in the key principle above. However, meeting this responsibility would be rather hollow if it did not also embrace a wider concern for national and global environmental policies and targets, and it is appropriate for a National Park to be showing a lead in these matters. The objective endorses the concept and implications of a 'low carbon' park.

Four important strategic approaches include:

- Strengthening the spatial planning and management of tourism in the National Park. This will require a closer look at the environmental and community impacts and capacities in different areas, strengthening management of the most highly visited locations and ongoing investment in infrastructure.
- Spreading and deepening enterprise involvement in environmental management
- Encouraging an integrated and mutually supportive approach between land management and tourism, seeking returns from the latter to meet impacts and costs on the former.
- Maximising opportunities for gaining positive benefits for conservation from tourism investment and activities, including direct support from businesses and visitors.

The objective has implications for development control, the quality of design and construction, visitor management and information, and the operation of tourism enterprises.

Outcome: Tangible negative impacts on the local environment and biodiversity have been avoided and there are examples where tourism spending and investment has positively contributed to conservation. More tourism stakeholders are taking more measures to reduce environmental impacts and to support the local natural and cultural heritage and further recognition and support as been obtained from tourists.

Indicators/ measurement:

- *Landscape and habitat quality/ change and species numbers in sensitive areas*
- *% enterprises engaged in environmental management*
- *Records of specific contributions to conservation / management*
- *% visitors using different transport options*
- *% visitors satisfied/ concerned with quality of environment*
- *Feedback from enterprises and communities on environment and heritage*

SO6: Leadership and partnership

To strengthen the engagement of public and private stakeholders in the development, promotion and management of tourism in the Cairngorms and provide coordination and leadership

There are many stakeholders with an interest in tourism in the Cairngorms who can benefit from it and contribute to its success. The forthcoming period will see significant public sector cuts and pressure on funding. It is increasingly important to focus resources and avoid duplication; clarity of approach towards supporting the Cairngorms as a destination in its own right is essential. Private sector operators may need to play a greater role in supporting this work and their local destinations.

Much will depend on an effective relationship between the CNPA and the CBP, but it is very important that representatives of local areas, different business sectors, land managers, conservation interests and local communities have a strong say and work together with them. Local authorities must remain engaged as a number of their functions affect the visitor experience, visitor management and enterprise development. Local communities can play a strong role in relating their areas to visitors.

This imperative of partnership places an even greater emphasis on the need for coordination and direction. The need for clear leadership was raised very frequently during the consultation. This has particular implications for having effective delivery structures which are clear and understood, together with excellent communication.

Outcome: The Cairngorms Sustainable Tourism Forum (CSTF), CBP and other related structures are working effectively with strong participation from a wide range of interests who feel well represented and actively involved.

Indicators/ measurement:

- *CSTF meeting and attendance records*
- *CBP membership numbers*
- *% Enterprises satisfied with engagement/structures*
- *Feedback from communities indicating satisfaction with engagement*
- *Financial commitment to actions from the strategy (budgets)*

3.4 Priority markets

The Marketing Framework for the Cairngorms National Park, developed in parallel with this strategy, focuses on the UK domestic market. In this context, it has been

considered appropriate to work with the priority market segments for Scotland that have been identified by VisitScotland. These include:

- Affluent Active Devotees. 1.4m households in the UK with a strong emotional connection to Scotland. Many empty-nesters and spontaneous travellers.
- Affluent Southern Explorers. 2.3m households, Southern UK based. Enjoy outdoors and fit in with local culture and like to discover new places.
- Younger Domestic Explorers. 2m households, mainly Northern UK based and see Scotland as accessible. One third have school age children. Look for traditional, authentic activities, including general touring and an interest in wildlife.

The Mature Devotees segment is also seen as an important grouping to consider.

In working with and refining these segments, it is important to consider some of the implications of the strategic objectives outlined above. For example, the emphasis on generating business out of season points to a priority on nearer markets, including Scotland and northern England.

Overseas visitors are also seen as playing an important part in the future of tourism in the Cairngorms and their current significance amongst longer stay visitors was shown from the visitor survey. Greatest levels of visits are from Germany and the Netherlands, which may be seen as primary market opportunities.

The 2005 strategy pointed to the need to prioritise generalist markets rather than more specific niches, and this approach is still seen as correct. However, attention was also drawn to the particular needs and opportunities of market segments motivated by particular special interests, including:

- activity holiday takers (as main motivation)
- wildlife enthusiasts
- skiers and other winter sports markets
- cyclists – including UK and overseas cycle tourers
- field sports markets.

The adventure travel market embraces some of the above but in a broader context and should be seen as a particular opportunity to develop in the next few years, building on the international adventure travel trade and media profile gained by the Cairngorms as hosts of the Adventure Travel World Summit in 2010.

Group markets are particularly important for many enterprises in the Cairngorms, including touring coach groups, educational groups, outdoor activity groups and incentives.

3.5 Framework of areas for action

In order to achieve the aims of the strategy and address the strategic objectives, priorities of action have been identified under the following functional headings:

1. Stakeholder engagement and working together
2. Brand awareness and marketing

3. Information and interpretation
4. Resource management and conservation
5. Outdoor access
6. Product diversification and distinctiveness
7. Business support and investment
8. Knowledge gathering and sharing

Details of these action areas are contained in the next section.

4 ACTION

This section takes each of the action areas in turn, considers how they relate to the strategic objectives (SOs) and to the principles of the European Charter and sets out priorities for action within them.

The eight action areas and 53 actions provide a framework for delivery of sustainable tourism in the Cairngorms over the next five years. They form the basis for more specific actions to be worked up and implemented by the stakeholders. This process is described further in section 5 of this document.

Taken all together the actions provide a comprehensive programme. The actions include many that are already being pursued but which need to be continued and in places strengthened as indicated in the text.

The descriptions of the actions have been kept purposefully broad, to enable a degree of flexibility in the more detailed development of specific activities and projects and in the sequencing of actions over time.

1 Stakeholder engagement and working together

This is about getting the main players involved, ensuring every stakeholder is informed and providing leadership and coordination.

Actions here relate directly to SO 6 (Leadership and Partnership) and are also very relevant to SO 4 (Geographical diversity) as they are critical to understanding the needs of different areas and delivering for them. Having effective structures is generally necessary for delivering the growth and the other objectives as well.

Most relevant European Charter principles: 1, 2, 8

► **1a: Support and promote an active Cairngorms Sustainable Tourism Forum**

The CSTF will play a critical role in bringing the different interests together and agreeing priorities and action. Its make up should be well balanced, so enabling the CNPA, the CBP, tourism business interests, land managers, local authorities, communities and conservation interests to understand each other.

The CSTF will have overall responsibility for the strategy and its implementation, checking on progress with actions and enabling coordination of the work. Members should feel fully engaged in the process and there should be regular meetings and feedback.

► **1b: Maintain an effective private sector body for the Cairngorms**

The advent of a single private sector body for the Cairngorms as a whole greatly strengthens the chances of achieving the vision of a world class destination. It is important that the CBP consolidates its position, growing its

membership and building up income from the private sector while receiving necessary public sector support to provide long term stability.

There is an opportunity to develop more involvement from enterprises, such as retailers and service providers, that may not see themselves specifically as tourism businesses but which rely partly on tourism spending and are clearly stakeholders in the sector,

► **1c: *Establish coordination and collaborative relationships between DMOs***

While the strategy underlines the importance and central role of the CBP as the private sector tourism body for the Cairngorms as whole, it recognises the position and role of other Destination Management Organisations that cover different areas and brands that may include parts of the Cairngorms, but have different brand strengths and market orientation. Individual businesses should join and work with those bodies that can deliver benefit to them and may wish to be involved with a number of DMOs and other groupings. However, in order to maximise benefit and ensure efficient use of limited resources, it is important that the DMOs carefully coordinate their activities and avoid unnecessary duplication; public sector bodies that support DMOs also have a key role to play.

► **1d: *Encourage sector or thematic networks***

Many destinations have found that networks between similar types of enterprise have been effective in developing business, raising standards and improving quality. Existing networks such as the Cairngorms Attractions Group, hostels network, activity operators group etc. have demonstrated the value of this. These and other sector or thematic networks should be encouraged and supported. Action should seek to spread membership across all parts of the Cairngorms.

► **1e: *Encourage active local area groups***

Some aspects of stakeholder engagement and destination management may be best carried out at a very local level. Active local tourism groups can play a strong role in involving local residents, community organisations and diverse small businesses in tourism. They are also well placed to work generally on improving the appearance of local areas, strengthening local information and interpretation, promoting events or engaging in specific community based initiatives and projects. Local groups in Nethybridge, Ballater, Braemar, Blair Atholl and elsewhere provide examples. Local structures of this kind should be encouraged and supported.

There is an opportunity to utilise the existing frameworks that bring together different interest at a local level, including Community Planning Partnership groups (particularly local groups that promote projects), the ward forums and the Association of Cairngorms Communities.

► **1f: Ensure public and third sector bodies link in to CNP tourism structures and initiatives**

Within the Cairngorms, some of the most important resources and management functions for tourism are in the hands of a range of public sector bodies or conservation organisations. Many are important landowners with visitor facilities; others are involved in infrastructure provision, transport, waste management etc. Examples include the local authorities, Forestry Commission, RSPB, National Trust for Scotland, Historic Scotland etc. They should play their part in delivering an integrated world class destination within the context of the Cairngorms National Park brand.

At a national level, strong links with Visit Scotland and other public sector bodies should be maintained, reflecting the National Park status of the destination.

► **1g: Maintain accessible communication with all tourism stakeholders**

Having the right structures is only one part of the story. Strengthening participation at all levels is critical. The approach should be to ensure that:

- all tourism stakeholders are informed and aware of what is going on;
- the most experienced and knowledgeable people are actively engaged.

This requires a programme of active communication, both targeted and widespread, including:

- Holding at least one open annual meeting for tourism interests
- Maintaining a good quality newsletter and e-mail communication process
- Strong local PR and media work
- Excellent feedback on actions taken
- Generating stories and publicising good practice, possibly through an awards scheme
- Maintaining direct communication with key businesses and other key stakeholders.

2 Brand awareness and marketing

A strong brand and effective marketing are essential for achieving the growth in tourism value (SO 1). The development of marketing strategy and tactics should pay particular attention to the strategic objective of growing value in the off-season (1a). To be effective, marketing must be customer focused and be based on a clear understanding of market demand and of processes followed by customers in selecting destinations and products throughout the 'visitor journey' (SO2). In this context, it should also convey the principle of a park for *all*.

The focus on the Cairngorms' special qualities and distinctiveness (SO 3) and on spreading business to different parts of the Park (SO 4) should be reflected in marketing activity and messages.

Headline actions are presented below. These will be developed in more detail within the context of the Cairngorms National Park Marketing Framework.

Most relevant European Charter principles: 5, 9

► **2a *Develop and convey the essence of the brand, based on the Cairngorms' core values***

In the last few years the Cairngorms National Park brand has been established and exposed through the presence of a striking visual identity (logo) which has achieved strong visitor recall. It is now important to deepen awareness and understanding of what the brand stands for and to convey in ways that are meaningful to:

- visitors and potential markets, to secure their interest and response.
- stakeholders and users of the brand, to strengthen their understanding of what it links and commits them to.

Work on the brand essence should relate to three requirements:

- Developing and conveying the personality attributes of the Cairngorms brand in terms of its overall character, for example as a welcoming and authentic place.
- Distilling, capturing and conveying the specific components of the Cairngorms which define its unique selling proposition that distinguishes it from other destinations. There should be a close link here to what have been termed the area's special qualities.
- Reflecting inclusivity and accessibility as core brand values.

This brand essence will need to be communicated to tourism enterprises and other stakeholders together with materials (including text, images etc.) that can be used by them.

► **2b *Promote further exposure and meaningful use of the brand***

The Cairngorms brand should be further rolled out, subject to reasonable controls on its appropriate use.

All public and private sector providers of services that are in line with the quality and sustainability principles of the Cairngorms should be encouraged to use the brand identity in their information and interpretation of the area.

While a principle of seeking to widen the number of enterprises coming within the brand family should be followed, it is also important that an enterprise's association with the brand should continue to convey some meaning. This should reflect the objectives of this strategy relating to customer focus and environmental responsibility. Therefore a requirement for businesses to be able to demonstrate commitment in these areas, such as through compliance with quality and environmental standards, should continue. Issues relating to the latter are covered further under action area 4 below.

► **2c *Maintain a world class destination website as the central vehicle for marketing***

A powerful and user-friendly website is a key tool for destination marketing and should be central to an overall IT strategy for the Cairngorms. The VisitCairngorms website meets this purpose and can be further developed and strengthened over time. A close working relationship needs to be maintained with the evolving Visit Scotland web based work.

Some key requirements are that:

- There should be strong links to this website from other sites related to the Cairngorms
- Up-front pages should clearly convey the brand and special qualities of the National Park
- The site directs enquirers quickly to real experiences, products and businesses
- The different parts of the Cairngorms are brought out, with relevant links
- The site reflects the attractions of the different seasons
- The need for better pre-visit information, identified in the analysis for this strategy, is met by good quality up to date material with attention to detail
- Consideration is given to the best ways of harnessing user generated response to enhance the site.
- The site is accessible and inclusive to all types of user, in the language and images it uses and in the relevance of its content to people with a wide range of needs.

The website should provide a key vehicle for carrying content and messages stemming from other elements of this action plan, relating to access, events, new product experiences etc. and wider 'public interest information' on how to help care for the special qualities.

► **2d *Plan and implement an annual marketing campaign for the Cairngorms***

A marketing campaign for the destination should be implemented each year, aimed at the selected target markets and reflecting the Marketing Framework. It should use a variety of tactics including cost effective approaches offered by website promotion, creative e-marketing, social networking, database development, PR etc.

Within, alongside or in addition to this more general campaign for the Cairngorms, more focussed campaigns should be considered and pursued which address seasonality, specific themes, and more defined markets.

► **2e *Maximise exposure of the Cairngorms in campaigns by VisitScotland and others***

As a National Park, the Cairngorms should be afforded strong exposure in national and international marketing by VisitScotland and others. This is particularly relevant in certain markets which could not be reached cost effectively by a locally based destination campaign, such as overseas markets. Relevant guidebooks and websites should also be targeted.

Coverage of the Cairngorms in regional and neighbouring area websites, print and campaigns should be secured.

Treatment of the Cairngorms should be based on effective use of the brand and associated messages and material.

3 Information and interpretation

Effective information and interpretation delivery are key tools in meeting a number of the strategic objectives. By ensuring that visitors are fully aware of all that the Cairngorms has to offer, they can encourage longer stays (SO 1b) and more visitor spending (1c) as well as spread to the various parts of the Park (SO 4). Action on interpretation is directly linked to the objective of raising awareness, understanding and enjoyment of the Cairngorms' special qualities (SO 3).

Information services should be strongly guided by the objective of customer focus (SO 2) with implications for issues such as opening times.

Most relevant European Charter principles: 5, 7, 10

► **3a Follow a strategic approach to information and interpretation delivery**

At a time of limited resources, it is important to ensure that information services are delivering the best possible return on investment. This will require a more detailed information and interpretation strategy that provides a basis for prioritisation. Important opportunities to address include:

- The practical implementation of the interpretation guide 'Sharing the Stories', which should be further taken up
- The hierarchical role of different information outlets within the network.

► **3b Review the medium term position of the VIC network and its relationship to the National Park**

The future level of provision and support for Visitor Information Centres by VisitScotland remains uncertain. However, visitor and enterprise research in the Cairngorms has confirmed the importance of the service they provide. Their position should be kept under review. There may be a need for more local engagement in the service. Opportunities for strengthening income to the VICs from a variety of activities and sources should be pursued. There may be opportunities for cost reduction and sharing, through partnership working, co-location and increased use of IT based services.

A number of the VICs jointly promote the Cairngorms NP brand and have dedicated racking. This presence should be completed and maintained, including extending a National Park information presence in gateway locations in the new southern extension to the park.

► **3c Maintain a wider set of information points at key sites and in communities**

The CNPA has established a programme of information provision through a range of outlets and sites in key locations, including information displays and racks at major visitor attractions and information boards in a number of local communities. Flexible racking has been provided. This could be extended to other locations, including in a number of local businesses.

► **3d Strengthen the provision of Cairngorms information and interpretation by tourism enterprises and other stakeholders**

Provision of information and interpretation directly by individuals who come into contact with visitors is considered to be a highly effective form of delivery.

This should be pursued actively in the Cairngorms. Local tourism enterprises should be provided with training and knowledge about the National Park, including its special qualities, sources of information for visitors etc. to pass on to their guests. A 'Park Aware' scheme, which embraces this approach, has been established by the CBP and needs to be developed and extended. Some recognition and identification of people who have received this training should be considered.

Efficient brochure distribution to enterprises, including the use of Cairngorms-based bedroom browsers should be maintained.

Visitor centres and attractions that are providing interpretation of specific sites and themes should be encouraged to place this also in a Cairngorms context, including providing information on other Cairngorms locations relevant to the story being told.

► **3e Further develop the role of rangers in information and interpretation**

Good progress has been made in coordinating the large number of ranger services in the Cairngorms and providing them with National Park branding. Ranger bases have also been improved as important outlets for information and interpretation within the more remote areas of the Park. This should be further consolidated and expanded.

Rangers should be encouraged to be more proactive in providing information and interpretation, including on responsible access (see under action area 5). This may require further training provision.

► **3f Maintain orientation material for the whole Park**

An important requirement in achieving the strategic objectives is for visitors to be aware of the whole area of the park and its different facets. This can be assisted by effective orientation material. The Park Panoramas introduced in recent years have been popular and serve this purpose well. There may be scope for alternative forms of information material, such as a fold out map leaflet, which clearly identify the different elements of the park, their main assets and how to access them.

► **3g Develop the use of mobile IT applications**

Opportunities for the use of mobile information technology in delivering information and adding creatively to the visitor experience have been expanding rapidly. Particular examples to develop further include:

- Downloadable map-based routes with interpretation
- Downloadable i-phone apps.
- Real time information, for example on events or weather conditions.

This also relates to investment in general IT connectivity (see 7c below).

► **3h Ensure effective park identity and directional signing**

The previous five years have seen extensive work on National Park identity signing, advance signing and directional signing within the Park. However, some gaps remain and the need for further improvement in signing was raised during the consultation. An ongoing programme should be maintained.

4 Resource management and conservation

This action area relates directly to SO 5 on reducing negative environmental effects from tourism and gaining support for the conservation of the Cairngorms' natural resources and heritage. This takes a position of concern not only for the environment and resources of the National Park but also for the global environment and contribution to climate change. Actions reflect the strategic approach of spatial planning, enterprise engagement in environmental management, integrated land management and positive support for conservation. Further, related, actions concerning outdoor access are presented later in Action Area 5.

Actions to maintain attractive landscapes, biodiversity and an unpolluted environment are also important for tourism growth and prosperity (SO 1) as they provide the primary reason why people visit the Cairngorms.

Most relevant European Charter principles: 3, 7, 8, 10

► **4a Guard against damaging and intrusive development**

Consultation revealed concern about a variety of types of development in the Cairngorms, some related to tourism but many only indirectly or not at all, that have spoilt or are threatening the special qualities of the Park and so could adversely affect the area's appeal to visitors. These include housing developments, roadways and tracks in the mountains, windfarms, powerlines and various other developments.

Any potentially intrusive development should be carefully assessed, with planning control powers and processes used to ensure that new development is sustainable. This has implications for the policies in the Cairngorms Local Plan and Local Development Plan, together with their implementation.

Issues relating to planning and influence on tourism development are covered in action area 7.

► **4b Strengthen spatial tourism planning and visitor management, based on evidence of impact**

A strategic approach to tourism planning should identify areas which:

- are best able to accommodate more development, traffic and visitors

- require most attention in terms of management and infrastructure
- may be at or near capacity limits, in general or at certain times.

This requires a more systematic assessment of evidence on the impact of tourism on the environment and communities in the National Park. Some data sets already exist but may need analysis; others need to be gathered.

Elements should include:

- The pattern of visitor flows on different routes and volumes of visitors at certain sites
- Basic environmental conditions, such as air and water quality (e.g. existing SEPA monitoring)
- The condition of species and habitats in particular areas of known sensitivity and pressure
- Perceptions of conditions and impact, e.g, via feedback from residents and visitors.

As well as undertaking a baseline study in selected locations, a system of indicators and repeated observation and measurement should be put in place, partly to act as an early warning system against developing problems (see Action Area 8).

Particular attention should be paid to planning and management in areas where there is a high concentration of visitor activity and tourism potential, such as the Glenmore area and Deeside.

► **4c *Encourage and assist tourism businesses to strengthen environmental management***

Feedback from tourism enterprises has found that while many are already involved in some aspects of environmental management there is scope for this to be stepped up. Various actions can be taken to assist this.

It is appropriate that CNP branding should still be linked to environmental management. In order to reach more businesses, there is a need to review the basis for identifying environmental standards and commitment. This may include continuing to promote the Green Tourism Business Scheme while considering alternative options including the outcome of proposals by VisitScotland to include environmental criteria in quality assessment. The CBP can also administer relevant codes and charters for particular types of activity.

Further advice and training should be made available for businesses, building on initiatives already run in some areas. Peer pressure and demonstration can be effective, engaging existing businesses that have already seen the benefits of environmental management to act as ambassadors and champions.

Enterprises that are meeting identified environmental standards should be rewarded by greater exposure in marketing. They should also be helped to network together, perhaps through a Green Business Club or similar grouping.

Simple information materials on how to be green have been provided for enterprises for use with visitors. This could be extended and used more widely.

The provision of environmental services, including waste collection and recycling, is important in enabling green business practice and should be improved where necessary to ensure a consistent level across the Cairngorms.

► **4d Pursue support for conservation and management from enterprises and visitors**

While it may not be possible to raise large sums of money from voluntary contributions from visitors, this is an important principle and should be taken forward. A study by the CNPA showed that it would be difficult to introduce a comprehensive park-wide visitor payback initiative at the present time. A more limited and sensitive approach may involve individual enterprises (and through them their guests) being linked to existing schemes and potential beneficiaries within the context of a flexible Cairngorms visitor payback programme. A more systematic approach should be reconsidered in due course.

Alongside raising income from visitors, a programme of inviting direct sponsorship from tourism enterprises should be pursued.

Revenue-raising through car parking schemes has proved successful and should be further developed in the National Park.

► **4e Encourage visitors to use greener modes of transport**

This remains a challenge in the Cairngorms as in most other rural destinations and is a key issue for the future. An integrated approach to transport planning and delivery across different modes of transport should be adopted. It is important to maintain action over time to gradually develop interest by enterprises and visitors and build on increased awareness. Opportunities to pursue include:

- Investing in relevant infrastructure, including rail, bus and the cycling network.
- Addressing timetabling as well as provision of services, to reflect the combined needs of visitors, communities and transport to work
- Maintaining and actively promoting public transport timetables and information
- Encouraging tourism businesses to inform visitors about how to reach them by public transport and working out possibilities for excursions without the car, assisting this where possible.
- Continuing to review possibilities of establishing strategic bus link services, including a cross-Park service.
- Promoting more cycling opportunities, including bike carriage on trains and buses
- Developing the electric car scheme.

5 Outdoor access

Provision of good quality access to the countryside is a fundamental resource for tourism in the Cairngorms and central to what many visitors will expect of a National Park. The Outdoor Access Strategy for the Cairngorms National Park – Enjoying the Cairngorms – provides a comprehensive overview of access related actions, themes and policies. This action area takes account of the Outdoor Access Strategy and considers priorities for access from a tourism perspective. This includes the opportunity to promote the destination for quiet recreation and enjoyment. It relates particularly to SO 3, the provision of distinctive experiences based on the special qualities of the National Park. The need to grow year-round tourism (SO 1a), for a customer focus (SO 2) and minimising environmental impacts (SO 5) are particularly important in the approach taken. This also reflects the need for an integrated approach to land management, linking tourism with other land uses, identified in SO5.

Most relevant European Charter principles: 4, 6, 8, 10

► **5a Maintain a good range of access routes based on popular paths**

The provision and ongoing maintenance of routes that are in good heart is recognised as the fundamental task in providing for outdoor access. The Core Paths Plan provides a basic framework for this. In considering routes to prioritise for work, particular attention should be paid to the need to provide accessible, attractive walks, cycles and rides over a range or path lengths and types, for tourists with varying needs and abilities.

The need for a partnership approach between the CNPA, land managers and other stakeholders is underlined. This should recognise the issue of maintenance of routes and human and financial resource implications for managers.

► **5b Provide guidance to visitors on responsible access**

Visitors should be encouraged and helped to access the outdoors responsibly. This requires providing knowledge and understanding on safety, the environment and wildlife, land use and management, respect for other visitors and other matters. Promoting the Scottish Outdoor Access Code and related general information should be undertaken by the CNPA, Scottish Natural Heritage and partners in consultation with land managers and other stakeholders.

The way the Code is applied in the Cairngorms should take account of local conditions and issues. In particular, this should address relationships between different user groups, including bikers and walkers, canoeists and anglers.

All the information delivery processes identified in action area 3 should be used in putting across the Code. Rangers are seen as having a particularly important part to play in this.

► **5c *Work with communities, land managers and other stakeholders on the promotion of access opportunities***

Work with communities, and communities of interest, on promoting local walks, cycles, horse rides and paddles, identified through leaflets, downloadable information and signing where appropriate, should be continued. Good practice by land managers rangers and third parties on the identification and promotion of routes, following the “guidance on the promotion of recreational opportunities and outdoor access in the Cairngorms National Park”, should be encouraged and supported.

Medium and long distance walking routes have proved an excellent product for sustainable tourism in many parts of the world, sometimes including the packaging of accommodation and various services for users. Further opportunities for establishing, identifying and promoting long distance routes should be pursued.

In addition to information on specific routes, the full range of access opportunities available, including walking at all levels and also the many other forms of outdoor recreation available in the Cairngorms, should be put across clearly to visitors in the form of composite information which is detailed enough to be acted upon.

► **5d *Clarify and facilitate opportunities for safe enjoyment of the mountains***

The central mountain core of the Cairngorms is a major feature of the National Park and of its special distinctiveness. While experienced hill walkers will know how to access the mountains, many less experienced visitors or those on a first time visit to the Scottish mountains may find this unclear. In this respect the Cairngorms is different from national parks in most other countries, which have well signed and waymarked routes in their mountains. While the Scottish tradition of avoiding such an approach is fully endorsed, it is important to enable visitors who wish to have a mountain experience to be able to access the mountains clearly, safely and responsibly. Possible actions include:

- Providing and promoting some selected routes on certain hills in good conditions, such as outliers to the main massif to the east and west, that offer easy access and afford excellent mountain views.
- Promoting guided walking opportunities and clarifying how to access them.

► **5e *Provide and promote specific opportunities for cycling and mountain biking***

Cycling is an increasingly popular activity by tourists, ranging from people on a cycling holiday to those seeking a day or half day’s ride. Where possible, off-road routes are preferred. The range of cycling demand can run from quiet family cycling along broad tracks to technical down hill rides suitable only for experts. Provision for this latter group already exists and plans are in the pipeline to open a second facility to cater for this sector. Some off-road routes have been provided in the Cairngorms and this network should be extended, including making links between routes. Cycle routes on suitable

roads, also linking into a network, should be identified. Cycling opportunities, including cycle hire, should be actively promoted.

There has been a rapid growth in mountain biking and some areas of the UK are capitalising on this as a significant tourism opportunity. Some parts of the Cairngorms have seen erosion and inter-user conflict arising from mountain biking. Actions should include:

- Encouraging and promoting the responsible mountain biking code
- Good information on where to mountain bike
- Provision of a range of dedicated routes in selected locations at all levels of difficulty.

► **5f Seek to address adverse impacts from wild camping**

While wild camping can provide a special experience for visitors and can have low impact if carried out responsibly and in the right places, problems from over-use and irresponsible camping have been growing in a number of locations in the Cairngorms. This needs to be addressed through information and management, working with the land managers, rangers, police and user groups.

► **5g Consider opportunities for promoting water borne access**

The Cairngorms offers a number of opportunities for canoeing, kayaking and rafting. The River Spey has been included in the core paths network and other rivers also provide a resource for some of these activities. Further consideration should be given to the capacity for increased use, together with possible impacts and management issues arising from this. Increased information for visitors on the opportunities may be provided, together with guidance on responsible use.

► **5h Establish a strategy on broadening the base for snow sport related activities**

The Cairngorms is the primary destination in the UK for skiing and other snow sports. The sector has been affected by varying weather conditions and will see the impact of climate change more directly than other activities. Snow sport businesses, CNPA and other relevant public sector bodies should develop a clear understanding of the current and future contribution, impact and needs of the sector and seek ways to support and gain most benefit from it, encouraging diversification while minimising its environmental impact.

6 Product diversification and distinctiveness

This action area relates directly to SO 3 on developing experiences of the Cairngorms' special qualities. Provision of diverse and distinctive products can help in delivering on the brand promise and address other objectives of seasonality (SO 1a), spend per head (1c) and spreading benefits to different parts of the Park (SO 4). Products should be presented in ways that focus on customer needs and

expectations (SO 2). Work in the areas of natural and cultural heritage should take note of the need for sensitivity and for contributing to conservation, and for strengthening the positive link between land management and tourism (SO 5).

This action area should be seen particularly in conjunction with the one above on outdoor access as many distinctive Cairngorms products include elements of outdoor access and activities.

Most relevant European Charter principles: 4, 5, 6, 9

► **6a Support the work of local operators in providing and packaging offers**

A key aspect of product development is about the way experiences are put together and presented to visitors. The role of a number of tour operators and guides located in the Cairngorms (or elsewhere but bringing business here) is critical in this.

The Cairngorms Outdoor Activity Providers Group supports these operators and the group should be encouraged and assisted to expand its coverage and activities, seeking to maintain and improve standards as well as awareness.

Packaging can be directed at specific audiences and designed to meet their interests and requirements, thereby stimulating engagement. This should include packages aimed at encouraging and facilitating visits by various minority groups and people with special needs.

► **6b Strengthen the range of leading wildlife tourism experiences**

The special biodiversity of the area together with a notable increase in tourist interest in wildlife, partly stimulated by media coverage, present a particular opportunity for the Cairngorms. The National Park has the potential to position itself as a leading destination for wildlife tourism in the UK. A number of existing visitor attractions promote wildlife experiences; much has already been done in this field but this could be built upon. Relevant action includes:

- Working with existing wildlife guides, including ranger services, and promoting more guided walks and interpreted experiences
- Further developing and promoting opportunities for visitors to watch and learn about wildlife at existing sites (such as National Nature Reserves) and identification of additional sites in suitable locations
- Introduction of relevant technology to visitor centres such as remote links to webcams
- Promotion of stories and opportunities around specific species
- Encouraging participation of visitors in recording wildlife sightings.

► **6c Coordinate and promote a full programme of events**

There are many kinds of event, large and small, that can provide visitors with a unique experience of the National Park. The way they are promoted, programmed and coordinated can also help to maximise their benefit to the economy across the year, bringing more business out of season, and

avoiding over-concentration and pressure on communities and resources. Actions to pursue include:

- Working with local communities and rangers in different parts of the park to promote existing events or establish new ones
- Providing an events coordination and enquiry facility
- Publishing and maintaining an up to date events timetable, for event planners as well as visitors
- Actively promoting events on the Cairngorms website and elsewhere.
- Maintaining regular links with Events Scotland
- Ensuring that promoted events are well managed.

► **6d Make more of Cairngorms produce**

Using more local food in tourism enterprises and for direct sale to visitors (including those self-catering) can strongly contribute to a distinctive visitor experience as well as boosting the retention of income locally. The need to pursue this was frequently underlined during consultation. The Royal Deeside and the Cairngorms DMO has identified food as a key theme and has been pursuing this through events and marketing. The CNPA has undertaken initial work in this area and a Food for Life project has been initiated. A range of stakeholders should work together to take this forward. Relevant actions include:

- Maintaining a directory of local produce and a guide to visitors on how to access it
- Identifying local produce through the Park brand
- Working on distribution challenges and coordinated supply points
- Encouraging hospitality businesses to engage actively and creatively, including developing local recipes etc., including provision of training
- Active promotion, including through festivals and events.

► **6e Encourage the enjoyment and purchase of local arts and crafts**

The creative sector in the Cairngorms has seen significant growth in recent years and arts and crafts are becoming more accessible to view and to buy. There is an increasing number of galleries in the area. It is important that all opportunities are fully covered in visitor information and that in turn the workshops, galleries and other venues provide a good level of visitor experience with high standards and clear reliable opening times. Further art and craft based businesses should be encouraged.

The Creative Cairngorms group supports the work of local artists and craftsmen, linking in with the National Park brand. They should be encouraged and assisted to expand their coverage and promotion.

► **6f Strengthen opportunities to experience local cultural heritage**

The cultural product in the Cairngorms is still comparatively weak and there appears to have been relatively little change in this area in the past five years. Some aspects of living culture can be presented through events (including music, dance etc.), produce and arts and crafts as identified above.

Opportunities to strengthen access to, and interpretation of, historic sites and buildings should be pursued.

A particular opportunity is to work with local community groups and civic societies on heritage projects. There are a number of examples of relevant initiatives around the Park. These can be helped with advice and support, including feasibility assessment, business planning, interpretation skills and marketing. This can build on the work of the Community Heritage Project which has been established to provide this kind of assistance.

► **6g Integrate sporting into the broader tourism offer**

The Cairngorms has a longstanding tradition of visitors coming to participate in countryside sports (shooting and fishing). It provides important income to many estates and the wider community through the provision of services to this market. However, it has tended to be seen as an activity that is separate from other forms of tourism. This should be addressed, as an opportunity for tourism businesses to strengthen their product offers and sporting estates to gain more benefit from tourism to support traditional land uses linked to the area's special environmental qualities.

Relevant actions include:

- Considering and adding to research evidence on market trends, needs and gaps
- Working with estates to further identify needs, interests and opportunities
- Facilitating links between sporting estates, accommodation providers and other tourism enterprises
- Pursuing opportunities to widen participation in sporting, including deer stalking in line with the Scottish Wild Deer Strategy
- Providing relevant information to visitors.

7 Business support and investment

As in all destinations, successful, profitable businesses are essential for sustainable tourism. The growth in tourism value called for in this strategy (SO 1) will primarily be secured and anchored by the efforts of individual businesses, but in the context of a world class destination. An essential requirement is that the Cairngorms is seen as an area that welcomes and facilitates investment and as a good place to do business.

Many of the strategic objectives are important to the success of business. The need to strengthen customer focus (SO 2) and to meet or exceed visitor expectations is particularly important. It is essential that all tourism businesses, large and small and irrespective of price level, are driven by a need to provide a high quality visitor experience.

Businesses will be helped by many of the actions presented above but they can also be supported by some direct assistance.

Most relevant European Charter principles: 4, 7, 9

► **7a Coordinate the delivery of business advice, training and support services**

Business advice is available in the area through Business Gateway, local authorities, Enterprise Networks and other services and can assist enterprises in all stages from start ups to improvement and expansion of established businesses. The Cairngorms Business Partnership could become recognised as a one-stop-shop for tourism businesses, coordinating and signposting to available assistance.

It is important for networks of businesses to work together to identify their future training needs. Again, the CBP is well placed to coordinate this. Topics for training and business development should reflect the objectives of this strategy, and should include amongst others:

- Market understanding and customer care, including the specific needs of different markets and types of visitor
- Business management, marketing and use of IT
- Environmental management and knowledge of the National Park

It is important to make sure that assistance is directed in part to businesses which may not currently be delivering the level of quality required by customers. However, in addition, it is also important to insure that entrepreneurial businesses with the potential to grow and innovate receive the support they need.

► **7b Help local people to gain relevant skills**

While for some enterprises labour supply is not an issue, for others it remains critical. Problems over the availability of housing for staff are recognised and should be kept in the forefront of policy and action on these matters. A further way of addressing this situation is to promote tourism more actively as a career option for local people and to provide courses locally on relevant skills. This should apply to young people but also to those of all ages seeking new employment or a return to work.

► **7c Support appropriate investment in infrastructure**

There are a number of forms of infrastructure that are important for the context of doing business in the Cairngorms. Investment in them should be supported, as appropriate, bearing in mind wider environmental and other impacts. These include:

- Investment in transport infrastructure to and within the Cairngorms
- Improvement in IT connectivity, including fast broadband available across the whole area
- Provision of housing affordable by staff working in the tourism sector

► **7d Identify and seek to reduce bureaucracy as a burden on business**

The fact that bureaucracy is cited as the main burden on enterprises should be addressed. From the surveys undertaken it is unclear exactly how this manifests itself. It is important to understand the extent to which this relates

to factors within local control. This could be addressed through a working group or panel of tourism businesses, which could be coordinated by the CBP.

► **7e Foster positive engagement with the planning process**

The benefit to tourism of sound planning and development control is recognised owing to the need to maintain the attractiveness of the area. However, it is important that good quality tourism development is not unnecessarily hampered by planning controls and that the process is used positively to promote good development. This requires excellent liaison between potential developers and planners from the beginning, so that alternative options, such as on location, design and materials, can be discussed constructively and creatively at an early stage.

The provision and use of supplementary planning guidance can help with this. The CBP should work with the CNPA on elucidating the planning process for its members and encouraging more engagement. Relevant business training sessions, involving planners, could be provided.

► **7f Encourage improvement in the range and quality of accommodation and catering**

The availability of good quality accommodation and catering, though not necessarily luxury or high price, is a weakness in the Cairngorms. To some extent this can be helped by skills training etc. as covered above. There is also a need to encourage new investment and development.

Investment in existing properties should be particularly encouraged. This is particularly needed in the hotels sector, where a number of enterprises have low trading levels, are run down or have closed.

There is may also be scope for further accommodation development based on new building. This could involve projects of different types or size. The critical question is the suitability of location and the use of high quality design and materials that are appropriate to the special environment and character of the Cairngorms. There are relevant examples in various parts of the world of innovative, environmentally friendly design used for all types of accommodation, from tents and cabins to more sizeable eco-lodges.

► **7g Recognise and support the role of visitor attractions**

The wide range of visitor attractions, some of which have sizeable visitor throughput, is a strength of the Cairngorms and helps to diversify the visitor appeal. Their role in generating visits, encouraging longer stays and spending, and providing employment is fully recognised. It is important to encourage attractions to maintain their quality and to adapt and innovate to meet market needs and opportunities. The development of new events and attractions should be considered carefully in terms of their impact on existing businesses and their relationship with the local heritage and environment.

8 Knowledge gathering and sharing

Ongoing development of knowledge about tourism and its performance and impact in the Cairngorms is critical for success. This is especially relevant in terms of securing further growth and underpinning business performance (SO 1) and in meeting the objective of customer focus (SO 2), as well as keeping on top of impacts on the environment (SO 5). Knowledge sharing can also foster partnership (SO 6).

Most relevant European Charter principles: 3, 4, 10

► 8a Keep abreast of enterprise performance and needs

The quarterly business barometer started by CBP in 2009 provides a developing record. It should be maintained and participation in it should be built up. It should be reviewed from time to time to see if improvements are needed to make the data more relevant to enterprises and for tracking performance trends.

More extensive enterprises surveys, covering opinion and need as well as performance, should as the one conducted for this strategy, should be undertaken periodically.

Enterprises should also be encouraged to provide individual feedback, through the CBP and other channels. A web-based facility can assist this process and stimulate business to business exchange.

► 8b Maintain a programme of regular visitor feedback and surveys

Enterprises should be encouraged to obtain regular feedback from their guests. A programme for this has been started (the DOVE project) and should be expanded. This feedback should relate to the individual businesses but also cover reaction to the destination as a whole. More extensive visitor surveys should be carried out on a periodic basis.

This visitor research should enable a better picture of the range of user groups and their specific needs to be built up. It should include questions on the diversity of visitors and feedback on accessibility.

► 8c Seek feedback from local communities

Local people's views on tourism should be sought. This should include information on the degree to which residents are at all involved in tourism and believe they are affected by it, as well as recording any concerns they may have about tourism impact.

This may be achieved through informal feedback or occasional household surveys, making use of any surveying on wider issues. Community Planning Partnerships and local ward forums can also be very valuable in providing feedback.

► **8d *Keep records of visitor flows and environmental quality and analyse trends***

Some relevant data are already recorded, for example on traffic flows, car park use, visitor centre footfall etc. This needs to be analysed and extended where necessary. Use should be made of external data sources, such as VisitScotland data on visits to attractions, which enable comparisons to be made with other areas.

Systematic measurements and observations on environmental quality and habitats should be undertaken, as covered in 4b above.

► **8e *Obtain relevant research findings on markets and products***

It is important to keep abreast of research undertaken in Scotland and elsewhere on market trends and tourism performance, including on markets of most relevance to the Cairngorms.

The fact that the National Park is used as a basis for a number of academic research projects each year provides an opportunity. Where possible, this work should be directed towards practical issues which can assist in delivering sustainable tourism. The research findings should be made available and disseminated.

It may also be necessary and helpful to commission specific research from time to time.

Valuable lessons can be learnt from activities and good practice in sustainable tourism in other national parks. The Cairngorms should play an active part in the European Charter network.

► **8f *Encourage effective sharing and dissemination of knowledge***

Knowledge gained can only be really useful if it is properly disseminated and shared. This can be assisted through dedicated web-pages, IT based networking and coverage in newsletters.

All tourism stakeholders should be encouraged to share their own data and experience to help to build up the knowledge base in the Cairngorms.

5 IMPLEMENTATION

This section outlines the process for driving the implementation of the strategy and actions over the five year period, which runs from 2011 to 2015.

The responsibility for ensuring implementation and providing coordination rests with the Cairngorms Sustainable Tourism Forum. Individual actions will be carried out by a range of players acting independently and in partnership.

5.1 Delivering annual action plans

Drawing on the action areas and framework presented in Section 4 above, annual action plans will be prepared. These will be drafted by an executive group, in consultation with key players, for discussion and approval by the CSTF. The plans will concentrate on priority actions for the year. Some actions may be repeated each year.

Where relevant actions fall within the ongoing work of individual organisations, these will be noted in the plan. Particular attention will be paid to actions which require joint inputs and the coming together of different players. An important task will be to identify them and to secure their commitment. Lead and supporting organisations will be identified against each action.

The annual action plan will include an indication of budgetary requirements and sources of funding. For some actions funding may be in place while for others it may need to be acquired, with the necessary preliminary fund-raising actions indicated in the plan.

Lead organisations will be responsible for taking forward the actions as indicated and for monitoring and reporting on progress.

Each meeting of the CSTF will contain an agenda item on the action plan, enabling the forum to be updated on progress across the plan as a whole. Actions which are falling behind will be identified and any necessary remedial measures, revisions and amendments will be discussed.

Towards the end of each year a brief report on the implementation of the action plan will be prepared and used as an input to the process of preparing the subsequent year's plan.

5.2 Key players in implementation

The list of organisations involved in implementing the strategy and actions is flexible and extendable and will evolve over time. An initial list of key players is presented below.

Cairngorms Sustainable Tourism Forum	Visit Scotland
Cairngorms National Park Authority	Scottish Natural Heritage
Cairngorms Business Partnership	Historic Scotland
	Forestry Commission Scotland
Royal Deeside and the Cairngorms	Scottish Environment Protection Agency
Destination Management Organisation	Business Gateway Scotland
Highland Perthshire Destination	
Management Organisation	Scottish Rural Property and Business
Speyside and Moray Coast Destination	Association
Management Organisation	National Farmers Union Scotland
Tomintoul and Glenlivet Highland	Royal Society for the Protection of Birds
Holidays	National Trust for Scotland
Outdoor Angus	
	The Cairngorms Campaign
Highlands and Islands Enterprise	Cairngorms Outdoor Access Trust
Scottish Enterprise	Cairngorm Outdoor Activity Providers
	Group
Highland Council	Cairngorms Attractions Group
Aberdeenshire Council	Cairngorms Hostels
Angus Council	Creative Cairngorms
Perth and Kinross Council	Inclusive Cairngorms
Moray Council	
Association of Cairngorms Communities	
Community Planning Partnerships	

5.3 Monitoring and renewal

Indicators of performance against outcomes relating to each of the strategic objectives were presented in Section 3.

The process of knowledge gathering, including monitoring through systematic feedback and surveys, has been integrated into the overall action framework as Action Area 8.

Based on the above, the annual action plans should include specific monitoring actions to be undertaken during the year.

The sustainable tourism strategy and action plan will run until the end of 2015. A brief mid-term review of the strategy and action plan will be carried out in 2013, summarising progress, confirming direction and pointing out any priorities for the remaining period. During 2015 a new strategy and action plan will be prepared for 2016 to 2020, which will provide a basis for reapplication for the European Charter.