

**Cairngorms National Park
Visitor Survey**

Report

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**Prepared For: Cairngorms National Park
Authority**

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1. Introduction

This report details the final results to emerge from a programme of research carried out by CELLO mruk research on behalf of the Cairngorms National Park, investigating a range of aspects regarding visitors to the area.

This document contains full year results and these can be compared directly with the interim report which covered surveys conducted between May and September 2009.

1.1 Background

The Cairngorms National Park was established in March 2003. It is widely recognised that, with the development of National Parks in Scotland, many opportunities will arise for both the people who work and live within the areas and for visitors to the parks. To guide the sustainable management of the parks, it is clearly important that information regarding volumes of use, visitor profile and behaviour, the knowledge and attitudes of visitors and the impacts of information provided to visitors are available to the bodies responsible for the parks management.

The last Park-wide visitor survey was conducted in 2003/04 and a measure of change is now required to help inform ongoing destination development work and key wider policy including the next National Park Plan (2012-17) and Local Development Plan. The aim of this survey is to update existing baseline visitor data and to provide a comparison with the 2003/04 survey.

1.2 Objectives

The main objectives of the study were as follows:

- Supply information about visitors and their visit in order to guide future tourism policy and activity;
- Gather data, which can be updated in future studies to enable changes to be tracked over time;
- Furnish information, which can be used to assist in the production of estimates of the volume and value of visitors to the overall National Park area, as well as key sub areas.
- Provide an indication of change in visitor attitudes and behaviour since 2003/04.

Three different types of questionnaires have been developed to fulfil the research requirements of the survey. These are as follows:

- Questionnaire for people visiting the National Park who live out with the park boundaries (referred to as 'visitors').
- Questionnaires for people visiting the National Park who live within the park itself (referred to as 'residents').
- Short on-line self completion questionnaire which anyone may complete (this aspect is not included in the interim data report¹).

1.3 Methodology

In order to provide suitable depth and breadth of responses, a methodology combining face to face interviews and self completion questionnaires was developed. This was used to ensure a robust response rate based on achieving location based targets and as such to keep the survey approach in line with the survey conducted in 2003/04.

Face to Face Interviews

Interviewers have been positioned at a variety of different locations, as outlined in Table 1. These locations were chosen to ensure coverage throughout the National Park and also provide a suitable number of potential respondents.

Two different types of questionnaires were administered as part of the survey. One was for people resident within the National Park boundary (residents) and the other for people living out with the National Park (visitors). Again this was set up to ensure consistency of approach with the previous survey data and methodology used in the 2003/04 survey.

In total 2500 face to face interviews were conducted for this interim report covering twelve months of survey work. This consisted of 563 interviews with people ('residents') within the Park and a further 1937 interviews with people ('visitors') living out with the Park boundary.

Face to Face Interviews

The table below summarises the number of interviews completed at each location during the 12 month period and provides full year survey comparisons with the last survey conducted in 2003/04. Numbers vary between this survey and 2003/04 as interview targets were altered for this years surveys. The long spell of poor weather conditions over the winter period did cause fieldwork access issues and as such interviewing was adjusted in some locations due to these issues. The main issues for the team were closed roads, poor travel conditions and low numbers of visitors at some of the more rural locations but this did also affect a number of non-rural locations. If interviews could not be conducted in the prescribed month they were moved to the next nearest date when access and safety issues were improved. As can be seen in the table below this did not overtly affect the distribution of interviews and when this is coupled with the agreed changes to interview targets in a number of locations we feel that these issues did not affect the final survey data in a significant way.

¹ This was due to only three such questionnaires being completed

Table 1: Interviewing Locations (Number of Completed Interviews)

	Number of Interviews	
	2003/04 (#)	2009/10 (#)
Aviemore	233	232
Ballater	147	212
Balmoral Car Park	84	51
Balmoral Distillery Car Park – Royal Lochnagar	85	41
Braemar	171	172
Cairngorm – ski area car park	147	191
Carrbridge – Landmark Centre	110	106
Dinnet – Burn o’Vat car park	39	40
Glen Esk – car park	48	39
Glen Doll/Clova – car park	49	42
Glenlivet Distillery car park	86	68
Glenmore Road End	36	45
Glen Muick – car park	48	23
Glenshee - ski area car park	112	146
Glen Tanar – car park	50	37
Grantown-on-Spey	121	122
Kincraig Highland Wildlife Park	110	98
Kingussie	97	53
Laggan	96	35
Lecht - ski area car park	86	97
Loch Garten – Osprey Centre car park	72	34
Linn of Dee – car park	36	38
Newtonmore – Highland Folk Museum	72	71
Ralia – car park	36	49
Rothiemurchus – car park	72	126
Skye of Curr – Speyside Heather Centre	99	62
Tomintoul	107	54
Loch Morlich	51	56
Blair Atholl – village square	-	160
Walkers Lay By A9	-	3

Interviews were conducted widely across different days of the week and different times of the day to ensure that a bias was not experienced with regard to specific types of visitors. The table below summarises the percentage of interviews conducted throughout the 12 month period during each day of the week.

Table 2: Interviews by day of the week

	2003/04 (%)	2009/10 (%)
Monday	11%	12%
Tuesday	10%	6%
Wednesday	12%	7%
Thursday	9%	12%
Friday	10%	18%
Saturday	26%	24%
Sunday	21%	21%

Forty five percent of respondents were interviewed at the weekend, with the remaining 55% being interviewed on a week day.

The following table compares the number of interviews conducted on a monthly basis across the 12 months of the full survey programme.

Table 3: Number of interviews by month of the year

	Number of interviews		% of interviews	
	2003/04	2009/10	2003/04	2009/10
	2500	2500	100%	100%
May	187	33	7%	1%*
June	375	248	15%	10%
July	374	397	15%	16%
August	375	399	15%	16%
September	251	234	10%	9%
October	187	215	7%	9%
November	125	105	5%	4%
December	125	46	5%	2%**
January	125	27	5%	1%**
February	125	282	5%	11%
March	125	320	5%	13%
April	125	194	5%	8%

* Small number completed due to later start – questionnaire and method agreed mid May 2009.

** Small number completed due to extreme weather conditions in the National Park and surrounding area which resulted in very poor conditions and safety concerns.

Response Rates

The numbers of completed questionnaires by questionnaire type was as follows:

- Face to face resident questionnaire 563 (417 in 2003/04)
- Face to face visitor questionnaire 1937 (2083 in 2003/04)

1.4 Opening Comments

Visitor Profile

Interviewing locations were selected to provide a broad cross section of potential respondents. These included the larger towns within the National Park as well as quieter locations more likely to be frequented by people participating in outdoor pursuits. There is however a lower likelihood of interviewing people who are only participating in climbing, hill walking, sailing or other active pursuits. The reason being, that unless they are stopped at a designated interviewing location (i.e. one with a reasonable throughput of visitors), individuals taking part in activities “off the beaten track” may not have been available for selection. The locations and number of target interviews per location was altered slightly from those conducted in 2003/04 based on local knowledge and throughput as well as the inclusion of a couple of new locations.

Margins of Error & Using Table Data

All sample surveys are subject to a degree of random error. It has become customary to provide an indication of the error margin by calculating the 95% confidence intervals for a simple random sample of the same size. These are provided in the table below. The magnitude of the error depends on the number of completed questionnaires and the results percentage.

Table 4: 95% Confidence Intervals

Number of Respondents	Margin of Error
	2009/10
2500	± 2%
1937	± 2.2%
563	± 4%
250	± 7%
100	± 10%

Note: The table shows the 95% confidence interval, sometimes called a margin of error. The table has been calculated on the basis of simple random sampling.

The table below provides examples of actual responses and how the margins of error may affect the results.

Table 5: Effect of margins of error on results

	Number of respondents	Margin of error	Variance
Q20 (visitors) Have you visited any other National Parks in the United Kingdom?	774 state yes (59%)	+/-3.5%	55.5% to 62.5%

Within the main body of the report we refer to previous survey data from the 2003/04 fieldwork. As this was reported in ‘2003/04’ we have used this ‘year’ to reference the findings.

In the tables used, if a ‘*’ is used this refers to a figure which is greater than zero but less than 1. Where a ‘-’ is used this refers to there being no data at all, in most cases this

means that no-one provided a response or that the question was not asked either in 2003/04 or 2009/10.

Historical Context

In reading this report it would be prudent to consider some of the external macro environmental issues that have impacted upon the tourism industry over the past few years.

Issues that have affected global tourism have included:

- The September 11 2001 terrorist attacks in the United States of America
- The SARS outbreak in Canada and Asia in 2002/3
- The war in Iraq in the spring of 2003 and the ongoing conflict in that area
- The worldwide economic recession (2008 to present day)
- Swine Flu outbreak in the UK (2009 to present day)
- Extreme weather and road conditions experienced in Scotland throughout December 2009 and January 2010 – Scotland experienced some very low temperatures ranging from an average of minimum of -2.5°C in December 2009 to -2.8 in February 2010. The winter period was officially noted as the coldest winter in 30 years and this will have had an effect on results.
- The ash cloud which affected British Airspace in mid April – we feel that this would only have a very limited affect on the survey data as nearly all interviews were completed before the ash cloud became an issue for British air space.

Skier Numbers 2009/10

The extreme weather conditions, whilst making travel difficult, did benefit the ski industry in the Cairngorms National Park. 3 of Scotland's 5 ski resorts are situated within the Park and the consistent snowfall, relatively stable weather patterns and resulting full area cover for each resort gave a reliable skiing product. This, coupled with the strong Euro and fewer 'cheap' European ski deals for Scots (following the demise of budget airline Globespan) meant that skiing in Scotland was a much more attractive proposition than had been in 2003/04. Total skier days for the Cairngorms National Park in 09/10 were 311,621 compared to 134,136 in 03/04, a rise of over 130%.

SKI AREAS	2010/09	2007/6	2003/4
Cairngorm	145007	38553	58500
Glenshee	116614	8521	25000
The Lecht	50000	13200	50636
TOTAL	311621	60274	134136

2009/10 was recorded as one of the best skiing seasons on record. Cairngorms National Park had consistent snow, stable weather and full snow cover. Skiing was also possible all

season long with 7 day skiing finishing on the 31st May. Ski weekends were also available up until the end of June. In comparison 2004/03 was notable for a lack of snow with skiing only mainly available in the Ptarmigan Bowl.

CairnGorm Mountain	2009/10	2003/4
Open Day	28th Nov 09	22-Dec-03
Last Day	31st May10	18-Apr-04
Stormed Off Days (no ski lifts)	19	19
Total Possible Days Skiable (with snow)	184	116
Skiing Days in Nov/Oct	2	

Ski data: CairnGorm Mountain Ltd/Ski Scotland Marketing Group.

2. Summary of Findings

The summary findings outlined below are based only on the face to face interviews.

Respondent Profile, Party Composition and Spend

Visitors to the National Park tend to be evenly spread across the different age groups.

Just under two thirds (65%) of all respondents are classified as social grade ABC1, 25% are C2 and the remaining 10% are classified as DE.

Overall, thirty six percent of respondents indicated that they were with their partner only on this visit to the Cairngorms National Park. Other members of their family accounted for a further 23%, friends was 19% and 15% of respondents were on their own. Only 1% came as part of an organised group.

The largest proportion of respondents indicate that their party was composed of 2 people including themselves, 49% stating this. Parties of five or over accounted for under a tenth of all visitor/resident group types (9%).

Origin of Visitors

In total 62% (58% recorded in 2003/04) of respondents interviewed came from Scotland. Overall 22% of respondents lived within the park boundary. The number of respondents interviewed who are park residents is based on a quota allocated to interviewers rather than a random selection of visitors. A further 40% (41% in 2003/04) of all those interviewed were with residents of Scotland living out with the National Park boundary.

There were no quotas on the visitor types and as such overall 48% were longer break while only 21% were day trippers. Those respondents on a longer break were also more likely to come from overseas (43% compared to 31% in 2003/04). Overall, nineteen percent of respondents came from other parts of the United Kingdom and the remaining 18% (15% recorded in 2003/04) were from overseas.

Expenditure

Respondents were asked to indicate how much they had spent on a variety of different items during their trip/day out to the Cairngorms National Park. Overall, when considering all types of visitors to the National Park, the average spend per day continued to be dominated by food and drink, excluding that consumed at their accommodation. For all respondents this was £29.63 (or £11.14 per person), rising to £43.18 (or £15.76 per person), for short break visitors to the National Park and dropping to £14.54 (or £7.42 per person), for residents.

Spend on other items such as tourist shopping was highest, as would be expected, among longer break visitors. Longer break visitors spent on average £18.91 per day per group (or £6.45 per person), on tourist shopping whilst residents only spent £1.97 per day (or £1.00

per person). The average spend per day on tourist shopping was £10.91 (or £4.10 per person).

Type of Visit

Sixty eight percent of all respondents (visitors) indicated that they were away from home on holiday in the National Park (compared to 53% in 2003/04). The vast majority of people who stated that they were on a day trip were residents or day trippers from other parts of Scotland. Eight percent of respondents who were on a short and 10% who were on a longer break also stated that they were on a day trip away from home.

On the whole, people spending one night or more away from home described themselves as being on holiday in the National Park (80% compared to 90% recorded in 2003/04). A further 3% of these respondents also stated that they are on holiday – visiting friends or relatives.

Holiday Information – Length and Location of Stay

In total 1524 visitors (those other than day trippers/residents of the Park) said that they would be spending at least one night away from their place of residence. Thirty five percent of these respondents indicate that they are staying between 1 and 4 nights away from home during this trip (compared to 31% in 2003/04). A further 34% of these respondents are staying away for between 5 and 7 nights (compared to 50% in 2003/04). Seventeen percent (27% in 2003/04) of respondents are staying 8 to 14 nights, with the remaining 14% staying 15 or more nights.

Accommodation Type and Booking Method

The most regularly used type of accommodation is a hotel/motel with 32% (37% in 2003/04) of all visitors indicating that they had or will use this type of accommodation on their trip to the Cairngorms National Park. The use of hotels rose to 39% (44% in 2003/04) for people on a short break and to 47% for those that were on their own.

Self catering is the second most popular type of accommodation in general with 20% of respondents indicating this. Respondents on a longer break are more inclined to stay in self catering accommodation, 26% stating this. Seventeen percent (14% in 2003/04) of all visitors said that they had stayed in bed and breakfast/guest house accommodation.

The most common means of finding out about the accommodation people are or will be staying in is through a previous visit (36%), through friends and relatives (22%) or via the internet (13%). Respondents on a short break were most likely to find out about their accommodation from a previous visit, 46% stating this compared to 29% of those visitors spending 5+ nights away from home.

The most popular means of booking accommodation is through a previous visit with the next most popular booking approach being to do it directly with the accommodation itself either by telephone (17% compared to 24% in 2003/04) or via the internet (9% compared to only 4% in 2003/04). The use of friends and relatives was also common and fairly consistent across the visit types (short and long) at 16% and 14% respectively.

Reasons for visiting the National Park

The five most important reasons for visiting the National Park were as follows:

■ Family holiday/day trip	9%
■ Sight seeing	9%
■ Visiting friends and relatives	10%
■ Scenery	7%
■ Like the area	7%

Visitors on a day trip are most likely to state that the main reason they chose to visit the Cairngorms National Park was family holiday (10%) and visiting friends and relatives (6%).

Visitors on a short break (1-4 nights) cited the similar reasons for choosing to visit the Cairngorms National Park as the day trip visitors. However they were also likely to say that it was because they liked the area (10%).

Those people on a longer break (5+ nights) were again likely to cite similar reasons but were more likely to mention scenery compared to others (10% compared to 6% for short break and 4% for day tripper respondents).

Information Sources

Over half (57%) of all visitors said that they **referred** to information on the Cairngorms National Park from a previous visit to the National Park. Second to this was advice from friends/ relatives which 23% of respondents used. The next most popular source of information, with 9% of all respondents, was using a travel agent/tour operator to find out about the National Park prior to their visit.

The two most important sources of information that people stated **influenced their decision** to visit the Cairngorms National Park were on/from a previous visit (55% - 49% was recorded in the 2003/04 results) and advice from friends/relatives (18%).

Transportation

When travelling to the Cairngorms the use of a private car was cited by 71% (70% in 2003/04) of all visitor and resident respondents with a further 6% (11% in 2003/04) coming by private bus/coach tour and 9% stating they used a hired car to get to the National Park.

When considering the type of transport used to travel within the Cairngorms National Park, once again the private car/hired car is the most common means of transport, with 80% of visitor respondents citing this. The next most popular means of transport within the National park area is walking, 12% of respondents indicating this. This is followed by bus/coach (11%).

Activities

When asked "*On this day trip/this trip away from home in the Cairngorms National Park, which activities, if any have you or will you take part in*", 72% (56% in 2003/04) of all respondents indicated that they would undertake some general sightseeing. This is

followed by 37% (48% in 2003/04) of respondents who said they will undertake some form of high or low level walking.

Age of respondent is a strong determinant in the likelihood of them participating in more active activities. For example younger respondents, that is those aged between 16 and 24 years, are considerably more likely to participate in active pursuits such as high level climbing, skiing and water sports compared to older respondents i.e. those aged 65+ years.

Towns and Attractions Visited

The seven most popular towns/villages visited were as follows:

■ Aviemore	46% (45% in 2003/04)
■ Braemar	29% (23% in 2003/04)
■ Ballater	25% (21% in 2003/04)
■ Grantown-on-Spey	15% (25% in 2003/04)
■ Blair Atholl	10%
■ Kingussie	9% (18% in 2003/04)
■ Newtonmore	8%

The most popular town/village across all of the visitor types was Aviemore. Fifty percent (61% in 2003/04) of visitors on a longer break indicated that they had visited this town, compared to only 30% (20% in 2003/04) of day trippers. As in 2003/04, day trippers are the one group who are least likely to have visited any of the towns/villages mentioned.

Ranger Bases

Twenty eight percent (26% in 2003/04) of all respondents indicated that they had visited at least one of the Ranger Bases indicated. Respondents most likely to have visited a ranger base are those on a longer trip away from home, of whom 43% (32% in 2003/04) stated that they had visited at least one of the bases. On the other hand only 12% of day tripper visitors and 15% of day tripper residents indicated that they had or intended to visit a Ranger Base.

Information

Forty two percent of all respondents indicated that they got information from somewhere during their visit to the Cairngorms. The incidence of getting information rose to 62% (32% in 2003/04) of visitors staying 5 or more nights away from home and 43% (22% in 2003/04) for those people on a short break. Residents were least likely to look for information with only 7% stating this.

For those people who did get information from somewhere on this trip, the main source was a leaflet display (20%) and a Tourist Information Centre (17%, compared to 58% saying this in 2003/04). For those respondents who mentioned getting information from a Tourist Information Centre this was most common amongst long-stay visitors (35%) and those from Europe (49%) and the rest of the world (43%). For the 2009/10 survey a direct question was asked of everyone but for the 2003/04 survey the question was routed from a

lead in question and thus differences in % terms will most likely relate to the far smaller base sizes for this question in the 2003/04 survey.

National Park

Eighty two percent (68% in 2003/04) of all visitors said that they were aware that they were in a National Park. Responses between the various types of visitor remain fairly similar, though those on a long trip were less likely to realise (79%) when compared to day trippers (87%).

Ninety one percent (88% in 2003/04) of visitors who were aware that they were in a National Park said that they knew this before arrival in the National Park. Visitors on a longer break away from home are most likely to state that they only became aware of the fact that they were in a National Park after they arrived in the area, 14% (18% in 2003/04) stated this.

The two main means by which visitors first became aware that this area is a National Park are from a brochure/guide book (28%, compared to 21% in 2003/04) and from friends/relatives (17%, compared to 10% in 2003/04). The results from 2003/04 had from a newspaper/magazine article (30% in 2003/04) and a television programme (30% in 2003/04) as the two most commonly mentioned methods.

The influence of the area being a National Park over people's decision to visit the area is only cited as being very or quite important by 51% (far higher than the 25% recorded in 2003/04) of respondents. Twenty one percent (compared to a higher 61% recorded in 2003/04) said that it was not very or not at all important and a further 27% said it was neither important nor unimportant.

Ease of access to information was seen as easy by 85% of visitors; 90% agreed that there are plenty of things to do in the Park at this time of year (time of year is based on the month/date of interview being conducted); 82% agreed that the Park would benefit from attracting lots of visitors; 87% agreed that the Park seems well managed and cared for and only 9% agreed that they would have enjoyed their visit more if there hadn't been so many visitors....all of these provide some very strong and positive feedback and provide a glowing endorsement of the Park as it is just now.

Likes and Improvements

The main likes, as would be expected, revolve around the scenery of the area, with 34% of visitors mentioning this. In addition to this visitors also mentioned the hills/mountains (19%), variety of attractions/activities (12%) and the peace and quiet (10%).

A variety of other aspects were also mentioned mostly relating to the wildlife (7%); walking/climbing (6%); open space (5%) and friendly people (6%).

Just over two fifths of all visitors (43%) said that nothing at all could have been improved to make their visit to the Cairngorms National Park more enjoyable. The three most commonly cited improvements were as follows:

■ Weather/snow	4%
■ Improve quality and choice of shops	4%
■ Upgrade A9	3%
■ Better signs	3%
■ Dual carriageway on the A9	3%
■ Better/cheaper accommodation	2%

Facilities, Customer Service and Rating of Visit

The number of people indicating that a selection of facilities in the Cairngorms National Park is poor is very low indeed and certainly lower than the figures recorded in 2003/04. The main issue with respondents is mobile phone reception/Wi-Fi with 13% seeing this as poor or very poor. Public transport comes out second worst with 11% (16% in 2003/04) of respondents stating that this is poor or very poor. This is followed by number of public toilets with 8% (13% in 2003/04) of respondents stating this is poor or very poor.

Customer service is also generally good or very good. Only 7% (3% in 2003/04) of respondents stated that customer service was poor or very poor in pubs and restaurants.

When asked to rate their overall visit to the Cairngorms National Park, with 1 being the lowest and 10 being the highest, almost 100% of respondents rated their visit to be a 5 or above with 8 being the single largest score provided (41% compared to 36% in 2003/04). Eighty percent (84% in 2003/04) of people rated their visit to be an 8, 9 or 10 on the scale provided.

Visits to this and other National Parks

Of those that had been to the National Park previously, 42% (far higher than the 14% recorded in 2003/04) stated that it is their first visit in the past 5 years. With regard to the number of times people have visited the National Park in the last 5 years we do see some stark differences. At one end we have 37% (42% in 2003/04) of people visiting the National Park between 2 and 6 times in 5 years. At the other end we have 12% (33% in 2003/04) visiting the National Park 11 or more times in the last 5 years – this we feel, is off-set by a higher number of respondents saying that this is their first visit in the past five years. A further 7% said they had visited more than 20 times.

The main statement which the largest percentage of people indicated to represent their view of the Cairngorms National Park prior to visiting was “A tranquil, unspoilt wilderness area, where conservation is the key aim”, 39% stating this. Visitors on a longer break 5+ nights were most inclined to state this – 44% doing so.

Nearly two thirds (63%) of all respondents indicated that they had visited other National Parks in the United Kingdom, lower than the 79% recorded in 2003/04.

The vast majority of visitors said that they would be likely to visit the National Park again – only 5% said unlikely and these were mostly long stay visitors.

Membership of Organisations and Groups

When asked if they were members of a variety of organisations or groups, the majority of respondents (79%) said that they were not. The largest number of people were members of the National Trust/National Trust for Scotland, 12% of all respondents stating this. The second most popular organisation that people stated they were members of was the Royal Society for the Protection of Birds, 7% stating this.

3. Research Outputs

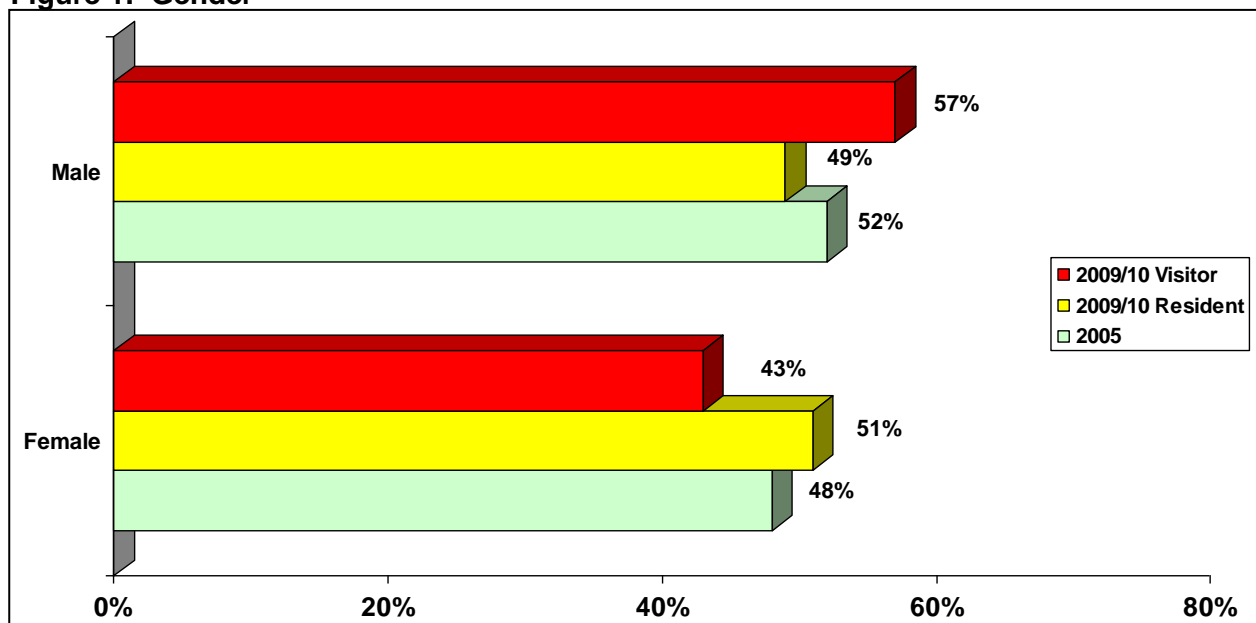
3.1 Respondent Profile, Party Composition and Spend

The proportion of male and female visitors interviewed was fairly even across the whole of the National Park. Just over half 55% (52% in 2003/04) of all respondents were male with the remainder (45% compared to 48% in 2003/04) being female. This pattern does not alter much when considering respondents who are residents, 50% of whom are female. Day trippers interviewed on the other hand are more likely to be male 61% than female.

Table 6: Gender (Figures in brackets refer to 2003/04 results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
Male	55% (52%)	50% (38%)	61% (65%)	57% (53%)	55% (51%)
Female	45% (48%)	50% (62%)	39% (35%)	43% (47%)	45% (49%)

Figure 1: Gender



Base: Visitors: 1937 Q39; Residents: 563 Q22

Source: CELLO **mruk** research

The age profile of the respondents is summarised in the table below. There is a good overall spread of ages across the different age bands and results are very close to the 2003/04 age profile.

Table 7: Age (Figures in brackets refer to 2003/04 results)

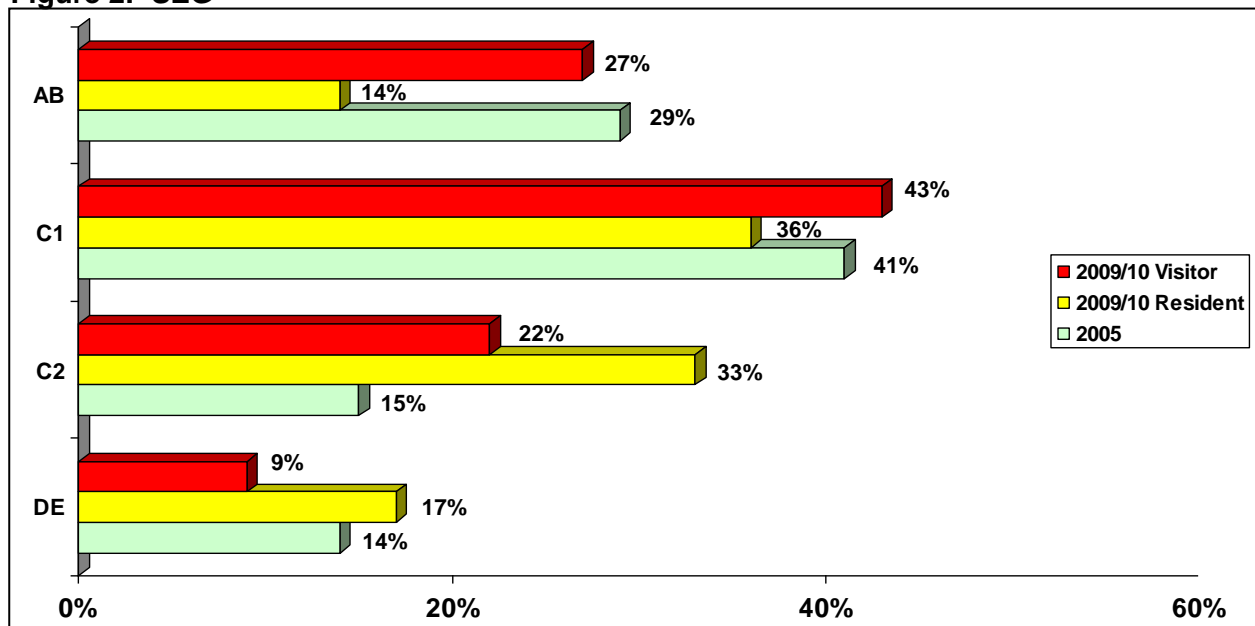
	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
16-24	9% (9%)	14% (14%)	17% (13%)	6% (8%)	5% (7%)
25-34	13% (18%)	12% (22%)	16% (21%)	13% (19%)	13% (15%)
35-44	19% (18%)	15% (19%)	20% (21%)	23% (20%)	17% (16%)
45-54	20% (19%)	19% (19%)	16% (21%)	20% (19%)	22% (19%)
55-64	18% (19%)	19% (15%)	13% (13%)	16% (19%)	20% (23%)
65+	18% (16%)	19% (12%)	12% (10%)	17% (15%)	18% (20%)

Almost two thirds of all respondents (65%- lower than the 70% figure recorded in 2003/04) are classified as social grade ABC1, 25% (higher than the 15% recorded in 2003/04) are C2 and the remaining 10% are classified as DE.

Table 8: Social Class (Figures in brackets refer to 2003/04 results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
AB	24% (29%)	14% (25%)	19% (29%)	23% (30%)	32% (31%)
C1	41% (41%)	36% (41%)	45% (40%)	42% (41%)	42% (42%)
C2	25% (15%)	33% (10%)	27% (18%)	25% (18%)	19% (15%)
DE	10% (14%)	17% (24%)	8% (13%)	10% (11%)	8% (12%)

Figure 2: SEG



Base: Visitors: 1937 Q42; Residents: 563 Q25

Source: CELLO **mruk** research

Sixty six percent of respondents stated that they were either working full time (56% - identical to 2003/04) or part time (10% - 9% in 2003/04). A further 22% indicated that they were retired.

The working status of respondents tends to be similar across the four main visitor types. Only the resident profile tends to differ.

Table 9: Working Status of Respondent (Figures in brackets refer to 2003/04 results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
Full time	56% (56%)	51% (55%)	59% (61%)	60% (55%)	56% (55%)
Part time	10% (9%)	13% (12%)	7% (9%)	8% (10%)	10% (8%)
Looking after house/family	2% (4%)	2% (6%)	2% (5%)	3% (4%)	2% (4%)
Retired	22% (22%)	22% (17%)	16% (15%)	20% (23%)	24% (27%)
Unemployed	1% (2%)	1% (6%)	1% (1%)	1% (3%)	1% (1%)
Full time education	5% (5%)	4% (3%)	11% (7%)	5% (5%)	4% (4%)
Other	3% (1%)	6% (0%)	3% (1%)	3% (0%)	3% (1%)

Overall, thirty eight percent of respondents indicated that they were with their partner only on this visit to the Cairngorms National Park. Other members of their family accounted for a further 25% of who respondents were with.

When considering the visitor profile those on short and long breaks are more likely to be with a partner (45%) than those on a day trip (26%). Residents are far more likely to be on their own, with 48% (far higher than the 22% recorded in 2003/04) stating this.

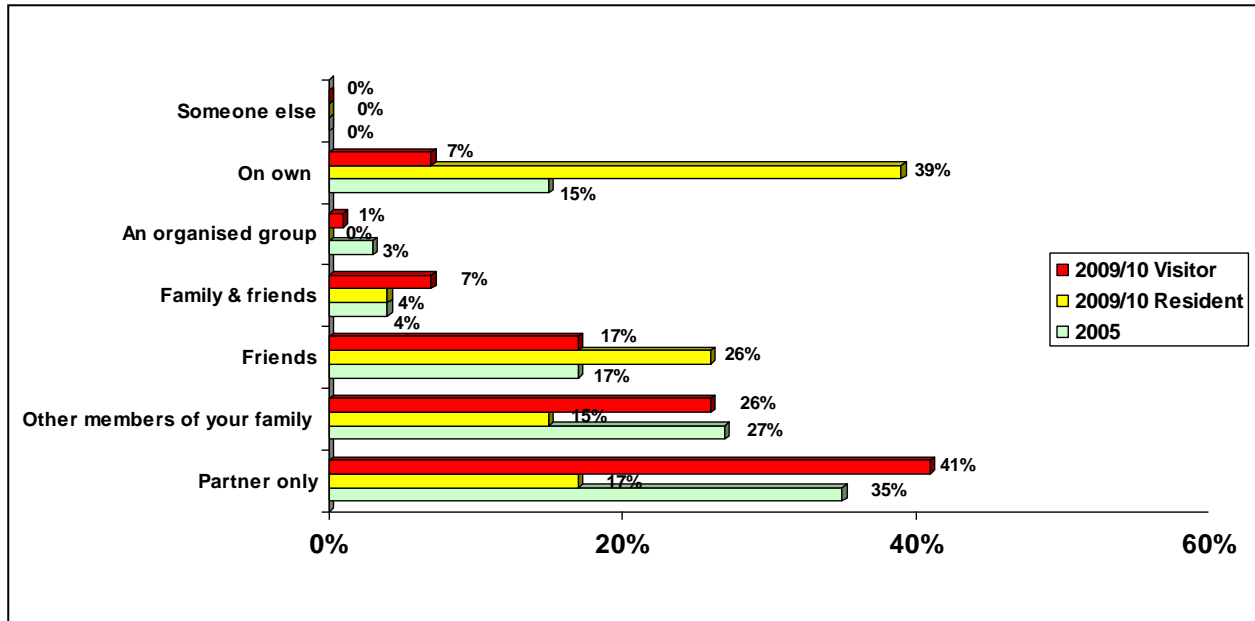
People spending a longer break away from home are most likely to be with their partner or other members of their family (71%), the figure for residents being 28%. For those spending a short break (1-4 nights), 69% are travelling either with their partner or other members of their family. The most common party composition for day trippers is to be with their partner or other members of their family (59% compared to 56% in 2003/04).

Table 10: Who are you here with today? (Figures in brackets refer to 2003/04 results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
Partner only	36% (35%)	17% (27%)	23% (28%)	45% (38%)	47% (41%)
Other members of your family	23% (27%)	15% (26%)	31% (28%)	25% (24%)	24% (28%)
Friends	19% (17%)	26% (24%)	26% (19%)	17% (17%)	14% (14%)
Family and friends	6% (4%)	4% (5%)	8% (5%)	6% (4%)	7% (3%)
An organised group	1% (3%)	0% (1%)	1% (4%)	1% (5%)	2% (3%)
On own	15% (15%)	39% (22%)	11% (17%)	7% (13%)	6% (12%)
Someone else	- (0%)	- (0%)	- (0%)	- (0%)	- (0%)

* Responses may add to more than 100% as a small number of people indicated more than one category.

Figure 3: Here with today



Base: Visitors: 1937 Q29; Residents: 563 Q16

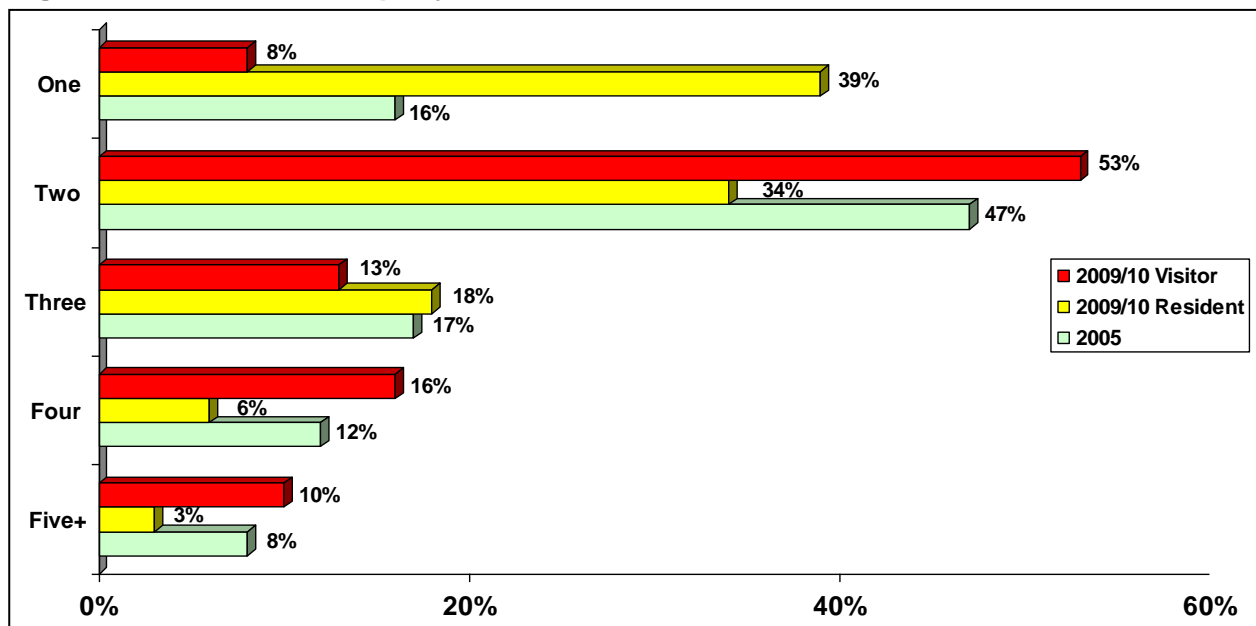
Source: CELLO **mruk** research

Approximately two thirds (63% compared to 64% recorded in 2003/04) of all respondents indicated that there were between 2 and 3 people in their party on this trip to the Cairngorms. A further 15% stated that there was only one person in their party.

Table 11: Total Number in Party (Figures in brackets refer to 2003/04 results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
One	15% (16%)	39% (23%)	11% (18%)	7% (15%)	7% (13%)
Two	49% (47%)	34% (35%)	43% (45%)	56% (49%)	56% (52%)
Three	14% (17%)	18% (20%)	17% (18%)	13% (17%)	11% (16%)
Four	13% (12%)	6% (12%)	20% (11%)	14% (11%)	15% (12%)
Five+	10% (8%)	3% (10%)	9% (8%)	10% (8%)	11% (7%)

Figure 4: Total number in party



Base: Visitors: 1937 Q30; Residents: 563 Q17

Source: CELLO **mruk** research

Eight percent of respondents stated that they had dogs with them on this trip. This figure remained fairly similar across the main visitor types with a peak of 13% for residents.

Table 12: Do you have a dog/dogs with you on this trip to the Cairngorms National Park? (Figures in brackets refer to 2003/04 results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
Yes	8% (10%)	13% (10%)	5% (10%)	6% (11%)	8% (9%)
No	92% (90%)	87% (90%)	95% (90%)	94% (89%)	92% (91%)

Origin of Visitors

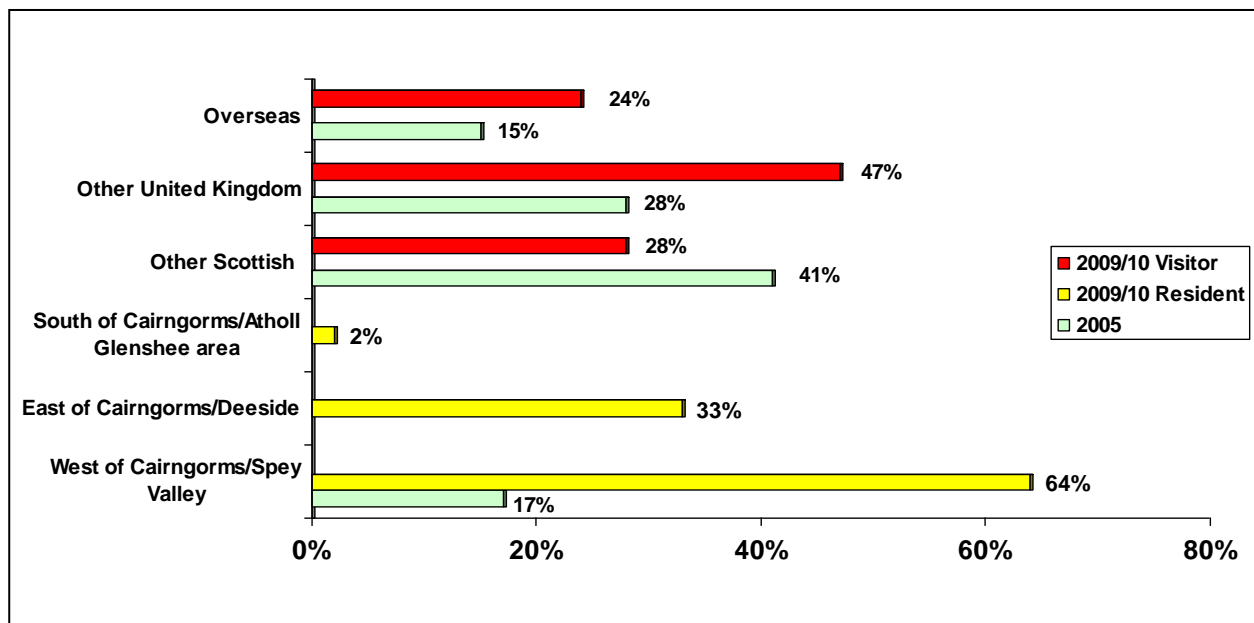
In total 62% (58% recorded in 2003/04) of respondents interviewed came from Scotland. Overall 22% of respondents lived within the park boundary. The number of respondents interviewed who are park residents is based on a quota allocated to interviewers rather than a random selection of visitors. A further 40% (41% in 2003/04) of all those interviewed were with residents of Scotland living out with the National Park boundary.

There were no quotas on the visitor types and as such overall 48% were longer break while only 21% were day trippers. Those respondents on a longer break were also more likely to come from overseas (43% compared to 31% in 2003/04). Overall, nineteen percent of respondents came from other parts of the United Kingdom and the remaining 18% (15% recorded in 2003/04) were from overseas.

Table 13: Origin of Visitors (Figures in brackets refer to 2003/04 results)

	Total	Visitor Type			
		Resident	Day Tripper	Short Break 1-4 nights	Longer Break 5+ nights
Base: All Respondents	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
Park Resident	22% (17%)	100% (100%)	(-)	(-)	(-)
Other Scottish	40% (41%)	- (-)	94% (100%)	65% (44%)	24% (27%)
Other United Kingdom	19% (28%)	- (-)	2% (-)	28% (50%)	33% (42%)
Overseas	18% (15%)	- (-)	4% (-)	6% (6%)	43% (31%)

Figure 5: Origin of visitors



Base: Visitors: 1937 Q38; Residents: 563 Q2

Source: CELLO **mruk** research

3.2 Expenditure

Respondents were asked to indicate how much they had spent on a variety of different items during their trip/day out to the Cairngorms National Park. Overall, when considering all types of visitors to the National Park, the average spend per day continued to be dominated by food and drink, excluding that consumed at their accommodation. For all respondents this was £29.63 (or £11.14 per person), rising to £43.18 (or £15.76 per person), for short break visitors to the National Park and dropping to £14.54 (or £7.42 per person), for residents.

Spend on other items such as tourist shopping was highest, as would be expected, among longer break visitors. Longer break visitors spent on average £18.91 per day per group (or £6.45 per person), on tourist shopping whilst residents only spent £1.97 per day (or £1.00 per person). The average spend per day on tourist shopping was £10.91 (or £4.10 per person).

Entertainment was another National Park where the visitors were inclined to spend more than residents. Visitors spend between £4.49 and £7.22 per day per person on entertainment whilst residents only spent £3.40 per day per person.

Transport expenditure, which can be notoriously difficult for respondents to estimate, is on average £10.28 per day per group. This figure peaks at £13.45 for day trip visitors to the National Park.

Table 14a: Mean spend per day per group & (Mean spend per day per person) 2009/10

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer Break 5+ nights
Food and Drink (outside accommodation)	£29.63 (£11.14)	£14.54 (£7.42)	£22.41 (£7.89)	£43.18 (£15.76)	£33.32 (£11.37)
Entertainment	£14.59 (£5.48)	£6.66 (£3.40)	£20.52 (£7.22)	£20.17 (£7.36)	£13.17 (£4.49)
Tourist Shopping	£10.91 (£4.10)	£1.97 (£1.00)	£3.82 (£1.34)	£12.01 (£4.38)	£18.91 (£6.45)
Transport within the area	£10.28 (£3.86)	£5.92 (£3.02)	£13.45 (£4.74)	£8.61 (£3.14)	£12.64 (£4.32)
Miscellaneous	£5.06 (£1.90)	£1.26 (£0.64)	£8.13 (£2.86)	£5.38 (£1.96)	£5.82 (£1.98)

The figures in brackets in the table above provides mean spend per day per person and these figures are all lower than those shown in table 14b below which shows results on the same basis from the 2003/04 survey. The main reason for this drop in mean expenditure per person is most likely related to a number of factors but certainly the key issue of note is the actual drop in the size of groups and as such the number of people that the overall expenditure covers has dropped since 2003/04. This is shown in table 11 above and shows clearly that group sizes have dropped. This is particularly prominent when looking at the percentage of groups made up of single people – this is most pronounced in the size

of groups who are not residents where single person groups have dropped from 18% to 11% for day trippers; 15% to 7% for those on a short break and from 13% to 7% for those on a long break. Conversely, groups with four or more people have increased from 19% to 29% for day trippers; from 19% to 24% for those on a short break and from 19% to 26% for those on a longer break.

Clearly there will be other additional reasons for the drop in mean spend. Below we make some suggestions and reasons for the changes but it should be noted that these are not part of the data and as such are some general assumptions. Issues such as the following could be considered as impacting on spending patterns:

- the global recession;
- changes in the type of package holidays and hotel boarding terms
- changes in the number of people using self catering and B&B accommodation (as opposed to hotels) – this is supported in the data in terms of the accommodation changes – this could lead to people providing their own food/lunches etc
- the volatile winter which affected travel and outdoor activities during the winter season

All of these and other factors could have a part to play in decreasing mean spend and clearly the reasons noted above are arguable either way but we do see these as possible sources of changes which were not covered by the questions asked during the survey.

Table 14b: Mean spend per day per person 2003/04

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer Break 5+ nights
Food and Drink (outside accommodation)	£19.09	£10.66	£6.92	£20.97	£27.27
Entertainment	£7.29	£3.93	£4.47	£6.48	£10.29
Tourist Shopping	£6.78	£3.50	£2.61	£7.82	£9.55
Transport within the area	£4.31	£6.01	£1.36	£4.19	£5.11
Miscellaneous	£2.09	£2.05	£4.35	£1.49	£1.32

For those (1298 respondents) who said that they were staying in accommodation they were asked to estimate their spend for the holiday. The results from this question are provided below.

Table 14c: Mean Spending on Accommodation

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer Break 5+ nights
Accommodation Spending	£262.63	NA	NA	£148.28	£342.24

An additional 98 respondents went on to say that they were on holiday as part of a package holiday and for this group, spend figures are provided in the table below.

Table 14d: Mean Spending on Package Holidays

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer Break 5+ nights
Accommodation Spending (Inclusive Package Holidays)	£563.64	NA	NA	£255.76	£835.29

For those on a package holiday they were next asked if this package included travel costs. Most (88%) said that it did include travel costs.

In terms of the spend per person per day (tables 14a) this was calculated through the inclusion of group sizes (a count of the number of adults and children) covered by the total expenditure incurred in the 24 hour period requested. These figures are provided below in table 14d. As is shown below those on a longer break had the largest mean group size (2.93) while residents had the smallest (1.96).

The table below also highlights the total numbers of adults and children by visitor type and shows that the expenditure data presented above relates to a total of 6,645 people (84% adults and 16% children (aged 15 and under)). The proportion of children in each visitor type varies with 15% for those on a longer break having the least number of children and those on a day trip having the most (21%).

Table 14e: Expenditure - Total Number of Children and Adults (Mean Group Size & Actual)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer Break 5+ nights
Adults	5,579	961	923	1,387	2,308
Children	1,066	145	252	258	411
Total	6,645	1,106	1,175	1,645	2,719
SAMPLE BASE SIZES	2,500	563	413	599	925
GROUP SIZE MEAN	2.66	1.96	2.84	2.74	2.93

3.3 Type of Visit

Sixty one percent of all respondents indicated that they were away from home on holiday in the area (compared to 53% in 2003/04). As table 15 highlights the vast majority of people who stated that they were on a day trip were residents or day trippers from other parts of Scotland. Eight percent of respondents who were on a short and 10% who were on a longer break also stated that they were on a day trip away from home. On the whole, people spending one night or more away from home described themselves as being on holiday in the area (87% compared to 90% recorded in 2003/04). A further 3% of these respondents also stated that they are on holiday – visiting friends or relatives.

Table 15: Which of the reasons listed best describes what you are doing today? (Figures in brackets refer to 2003/04 results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer Break 5+ nights
Base Number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
On a day trip/Away from home on a day trip	35% (43%)	100% (100%)	99% (100%)	8% (7%)	10% (2%)
Away from home – on holiday in this area	61% (53%)	- (0%)	- (0%)	87% (87%)	86% (92%)
Away from home – visiting friends or relatives on holiday	3% (2%)	- (0%)	- (0%)	3% (3%)	3% (3%)
Visiting friends and relatives – other reason	1% (1%)	- (0%)	- (0%)	1% (2%)	1% (2%)
Other	- (1%)	- (0%)	* (0%)	(1%)	(1%)

For those who said that they were on a day trip from home they were also asked what type of trip this was. This response was provided by 883 respondents and the split in the type of trip taken was:

- 47% were on a short outing from home (less than three hours)
- 53% were on a day outing from home (3 hours plus)

Residents to the park were more likely to say that they were on a short outing (54%) when compared to visitors to the park while the reverse is true for those on a day outing – they were more likely to be visitors to the Park (65%) when compared to resident respondents.

3.4 Holiday Information – Length and Location of Stay

Two different types of questionnaires were administered as part of the survey. One was for people resident within the National Park boundary (residents) and the other for people living out with the National Park (visitors). The following section is based upon the responses received from the “visitors” questionnaire.

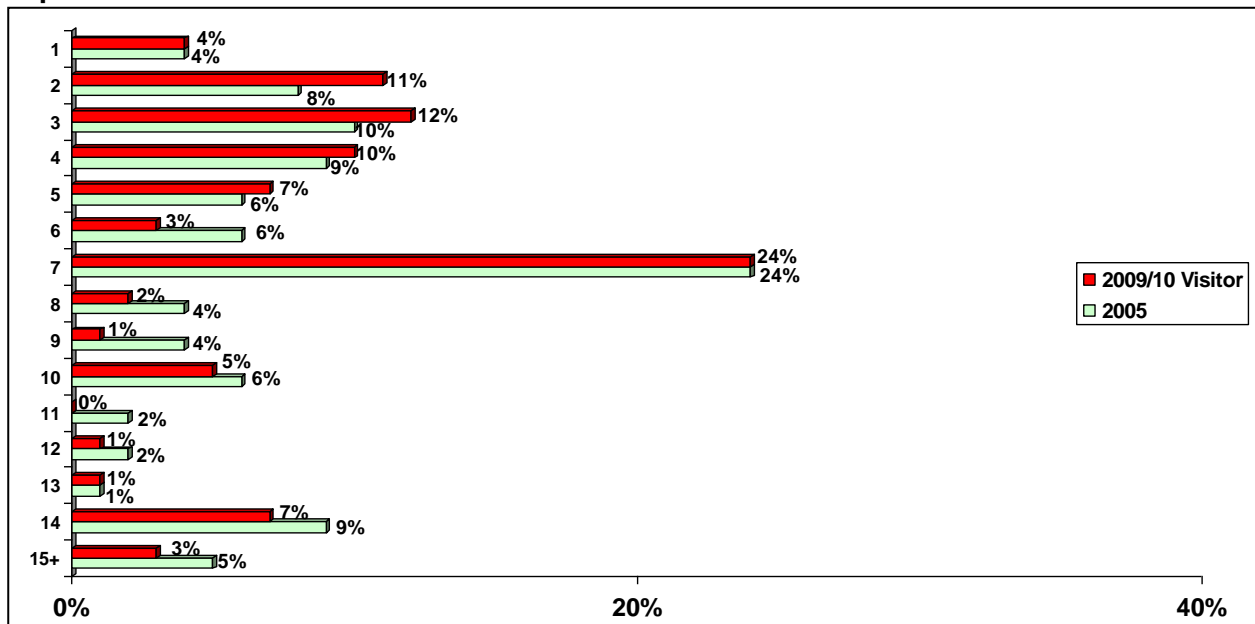
Thirty seven percent of these respondents indicate that they are staying between 1 and 4 nights away from home during this trip (compared to 31% in 2003/04). A further 34% of respondents are staying away for between 5 and 7 nights (compared to 50% in 2003/04). Seventeen percent (27% in 2003/04) of respondents are staying 8 to 14 nights, with the remaining 12% staying 15 or more nights.

As table 16 below highlights, the most popular number of nights for people staying away on a longer trip is seven, 41% stating this, highlighting the importance of a week long holiday. In contrast, shorter breaks vary considerably from one night to four nights, with 2, 3 and 4 nights being almost identical in the number of visitors spending that length of time away from home.

Table 16: How many nights in total will you be spending away from home on this trip? (Figures in brackets refer to 2003/04 results)

	Total	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1617 (1569)	599 (479)	925 (1090)
1	4% (4%)	11% (12%)	- (-)
2	11% (8%)	30% (27%)	- (-)
3	12% (10%)	33% (32%)	- (-)
4	10% (9%)	26% (30%)	- (-)
5	7% (6%)	- (-)	13% (8%)
6	3% (6%)	- (-)	6% (8%)
7	24% (24%)	- (-)	41% (34%)
8	2% (4%)	- (-)	4% (6%)
9	1% (4%)	- (-)	2% (5%)
10	5% (6%)	- (-)	8% (8%)
11	* (2%)	- (-)	1% (3%)
12	1% (2%)	- (-)	2% (2%)
13	1% (1%)	- (-)	1% (1%)
14	7% (9%)	- (-)	13% (13%)
15+	12% (5%)	- (-)	9% (12%)
Average length of stay	7.35 (8.10)	2.75 (2.79)	10.33 (10.44)

Figure 6: How many nights in total will you be spending away from home on this trip?



Base: Visitors: 1617 Q2;
Source: CELLO **mruk** research

3.5 Accommodation Type and Booking Method

The most regularly used type of accommodation is a hotel/motel with 32% (37% in 2003/04) of all visitors indicating that they had or will use this type of accommodation on their trip to the Cairngorms National Park. The use of hotels rose to 39% (44% in 2003/04) for people on a short break.

Self catering is the second most popular type of accommodation in general with 24% of respondents indicating this. Respondents on a longer break are more inclined to stay in self catering accommodation, 32% stating this.

Seventeen percent (14% in 2003/04) of all visitors said that they had stayed in bed and breakfast/guest house accommodation.

The fourth most popular type of accommodation was camping/caravanning with 15% (12% in 2003/04) of visitors using this type of accommodation. Staying with friends/relatives is cited by 7% of visitors (11% in 2003/04).

Table 17: During your stay in the Cairngorms National Park, which type of accommodation, have you, or will you use? (Figures in brackets refer to 2003/04 results)

	Total	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1617 (1569)	599 (479)	925 (1090)
Hotel/motel	32% (37%)	39% (44%)	28% (34%)
Guest House/B&B	17% (14%)	17% (12%)	17% (14%)
Guest house	4% (5%)	2% (4%)	5% (5%)
Bed and Breakfast	13% (9%)	15% (8%)	12% (9%)
Self Catering	24% (25%)	14% (13%)	32% (31%)
Self-catering flat/house/cottage	20% (16%)	12% (7%)	26% (21%)
Time share	3% (7%)	1% (4%)	5% (9%)
Second home	1% (2%)	1% (2%)	1% (1%)
Hostel/Bunkhouse	5% (6%)	7% (8%)	3% (4%)
Hostel (SYHA or others)	4% (4%)	6% (4%)	2% (3%)
Bunkhouse	1% (2%)	1% (4%)	1% (1%)
Camping/Caravanning	15% (12%)	13% (15%)	16% (12%)
Static caravan – rented	1% (1%)	1% (1%)	1% (0%)
Static caravan – owned	1% (1%)	2% (2%)	1% (1%)
Touring caravan	3% (3%)	2% (4%)	4% (3%)
Motor home	5% (3%)	2% (2%)	7% (4%)
Tents in campsite	3% (3%)	4% (4%)	2% (3%)
Wild camping	2% (1%)	2% (2%)	1% (1%)
Staying with friends/relatives	7% (11%)	9% (13%)	6% (10%)
Other	1% (1%)	1% (1%)	1% (1%)

The most common means of finding out about the accommodation people are or will be staying in is through a previous visit (36%), through friends and relatives (22%) or via the internet (13%).

Supporting this form of information gathering are means such as;

- Tour Operator/Travel agent 9%
- Directly with the accommodation 9%

Respondents on a short break were most likely to find out about their accommodation from a previous visit, 46% stating this compared to 29% of those visitors spending 5+ nights away from home.

Table 18: How did you find out about the accommodation that you are staying in or intend to stay in, in the Cairngorms National Park? (Figures in brackets refer to 2003/04 results)

	Total	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1298 (1416)	535 (428)	763 (988)
Previous visit	36% (-)	46% (-)	29% (-)
Friend/Relative	22% (-)	23% (-)	21% (-)
Travel Agent / Tour Operator	9% (16%)	3% (14%)	13% (17%)
Part of an organised group	2% (3%)	2% (4%)	2% (3%)
Directly with accommodation	9% (57%)	4% (63%)	12% (53%)
Directly with accommodation – by telephone	1% (28%)	1% (36%)	1% (24%)
Directly with accommodation – via Internet	7% (13%)	2% (11%)	10% (13%)
Directly with accommodation – in person	1% (16%)	1% (16%)	1% (16%)
Through a Tourist Information Centre	2% (4%)	1% (4%)	3% (4%)
Through the Internet	13% (4%)	14% (4%)	12% (4%)
Can't Remember	1% (1%)	1% (2%)	1% (1%)
Don't know	2% (11%)	1% (9%)	2% (11%)
Other	5% (31%)	5% (30%)	5% (31%)

When taking the previous table into consideration it is not surprising to see that the most popular means of booking accommodation is through a previous visit with the next most popular booking approach being to do it directly with the accommodation itself either by telephone (17% compared to 24% in 2003/04) or via the email (14% compared to only 4% in 2003/04). The use of friends and relatives was also common and fairly consistent across the visit types (short and long) at 16% and 14% respectively.

In contrast the use of a tour operator/travel agent was highest among respondents on a longer break (12%) compared to 3% for those on a short break.

Table 19: How did you book the accommodation that you are staying in or intend to stay in, in the Cairngorms National Park? (Figures in brackets refer to 2003/04 results)

	Total	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1298 (1377)	535 (422)	763 (955)
Previous visit	19% (-)	23% (-)	16% (-)
Friends/relatives	15% (-)	16% (-)	14% (-)
Travel Agent / Tour Operator	13% (15%)	9% (12%)	16% (16%)
Part of an organised group	2% (3%)	2% (3%)	2% (3%)
Directly with accommodation	34% (46%)	34% (52%)	33% (43%)
Directly with accommodation – by telephone	17% (24%)	23% (32%)	12% (21%)
Directly with accommodation – via email	14% (9%)	9% (8%)	18% (9%)
Directly with accommodation – in person	3% (13%)	2% (12%)	3% (13%)
Through a Tourist Information Centre	1% (2%)	1% (1%)	2% (3%)
Through the Internet	9% (2%)	9% (1%)	8% (2%)
Can't Remember	1% (1%)	1% (2%)	0% (1%)
Don't know	3% (16%)	3% (14%)	4% (17%)
Other	4% (15%)	3% (14%)	5% (16%)

3.6 Reasons for visiting the National Park

Table 20 summarises the main reasons visitors gave for visiting the Cairngorms National Park. The five most important reasons for visiting the National Park were as follows (interim results from the May to September 2009 part of the survey are provided in brackets for comparison):

■ Skiing	12%	(0%)
■ Family holiday/day trip	9%	(10%)
■ Sight seeing	9%	(10%)
■ Visiting friends and relatives	10%	(11%)
■ Scenery	7%	(10%)
■ Like the area	7%	(7%)

Visitors on a day trip are most likely to state that the main reason they chose to visit the Cairngorms National Park was skiing (25%), family holiday (10%) and visiting friends and relatives (6%).

Visitors on a short break (1-4 nights) cited the similar reasons for choosing to visit the Cairngorms National Park as the day trip visitors. However they were also more likely to say that it was because they liked the area (10%).

Those people on a longer break (5+ nights) were again likely to cite similar reasons but were more likely to mention scenery compared to others (10% compared to 6% for short break and 4% for day tripper respondents).

Table 20: What were the main reasons that you chose to visit the Cairngorms National Park on this day out/during this stay away from home? (2009/10 Results)

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1937	413	599	925
Scenery	7%	4%	6%	10%
Peace and quiet	2%	0%	3%	2%
Been before	3%	1%	3%	4%
Never been before	2%	0%	2%	4%
Visiting friends / family	10%	6%	12%	10%
Like the area	7%	3%	10%	8%
Family holiday / day trips	9%	10%	12%	7%
See wild animals	3%	5%	1%	3%
Passing through / stopping for a break	3%	2%	3%	3%
Sight seeing	9%	7%	6%	12%
Hill walking / climbing	3%	3%	3%	3%
Explore	3%	0%	2%	5%
Skiing	12%	25%	15%	5%

In table 21 below we have reproduced the results from 2003/04. We have provided separate results as the question was phrased differently.

Table 21: What were the main reasons that you chose to visit the Cairngorms National Park on this day out/during this stay away from home? (2003/04 Results)

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1761	192	479	1090
Walking/hill walking	11%	26%	12%	8%
Generally like the area, positive statement	9%	10%	10%	9%
Visiting friends and relatives	9%	6%	10%	9%
Always wanted to visit area	8%	5%	4%	10%
Come regularly/visit often/been before	7%	8%	6%	7%
Beautiful scenery, countryside, lochs/sightseeing	7%	7%	6%	7%
Passing through	6%	7%	5%	6%
Rest and relaxation, change of scene	6%	3%	9%	5%
Coach tour, organised tour/trip, bus trip	5%	6%	5%	5%
Skating/Snowboarding	5%	2%	9%	4%
Never been before/something different	4%	3%	4%	5%
Timeshare available	4%	2%	3%	5%
Nostalgia – been when younger, different stage in life etc	3%	2%	2%	3%
Bird watching/wildlife/insects	3%	1%	2%	3%
Travel time/distance suits me/easy access	3%	6%	4%	1%
Sight seeing	2%	4%	1%	3%
General day out, day trip with family etc/friends	2%	7%	2%	2%
Visit Funicular Railway	2%	2%	1%	3%
Whiskey distilleries, whiskey tour	2%	2%	1%	2%
Touring area	2%	2%	1%	3%
Climb mountains/Munros	2%	3%	2%	2%
Central for other places	1%	3%	2%	1%
Cycling/mountain biking	1%	2%	1%	1%
Variety of things to do/things for all ages	1%	2%	1%	1%
Visit Balmoral Castle/Castles	1%	1%	1%	1%

* Different coding frame used in 2003/04

3.7 Information Sources

Over half (57%) of all visitors said that they **referred** to information on the Cairngorms National Park from a previous visit to the area. Second to this was advice from friends/relatives which 23% of respondents used. The next most popular source of information, with 9% of all respondents, was using a travel agent/tour operators to find out about the area prior to their visit.

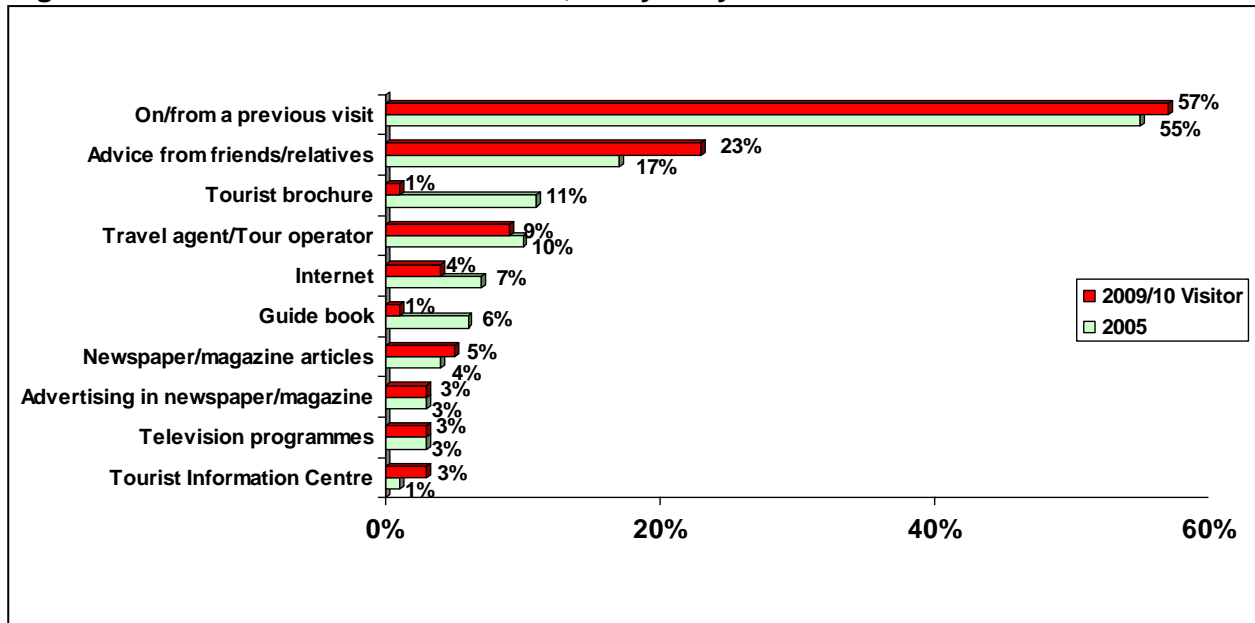
Day trippers to the National Park were most likely to indicate that they referred to information on/from a previous visit with 80% using this source. In contrast 24% of staying visitors were likely to have taken advice from friends/relatives. Thirteen percent of longer stay visitors were also likely to refer to a travel agent/tour operator for information.

Overseas visitors were least likely to have used knowledge from a previous visit with only 12% stating this compared to 77% of Scottish visitors. Overseas visitors were most likely to have received advice from relatives (33%) or from a travel agent/tour operator (24%).

Table 22: Which sources of information, if any did you refer to, to find out about the Cairngorms National Park in the first place/prior to this visit? (Figures in brackets refer to 2003/04 results)

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1937 (2083)	413 (514)	599 (479)	925 (1090)
On/from a previous visit	57% (55%)	82% (67%)	64% (62%)	41% (45%)
Advice from friends/relatives	23% (17%)	11% (11%)	24% (18%)	27% (18%)
Internet	4% (11%)	1% (10%)	4% (9%)	6% (12%)
Tourist brochure	1% (10%)	0% (3%)	1% (10%)	2% (14%)
Guide book	1% (7%)	0% (4%)	0% (5%)	2% (10%)
Travel agent/Tour operator	9% (6%)	0% (2%)	6% (4%)	15% (10%)
Newspaper/magazine articles	5% (4%)	2% (3%)	4% (3%)	7% (6%)
Advertising in newspaper/magazine	3% (3%)	1% (3%)	2% (4%)	5% (3%)
Television programmes	3% (3%)	1% (1%)	2% (2%)	5% (4%)
Tourist Information Centre	3% (1%)	1% (1%)	2% (0%)	5% (2%)
Other	1% (8%)	1% (8%)	1% (6%)	1% (8%)
None of these	5% (11%)	7% (12%)	4% (10%)	5% (10%)

Figure 7: Which sources of information, if any did you refer to



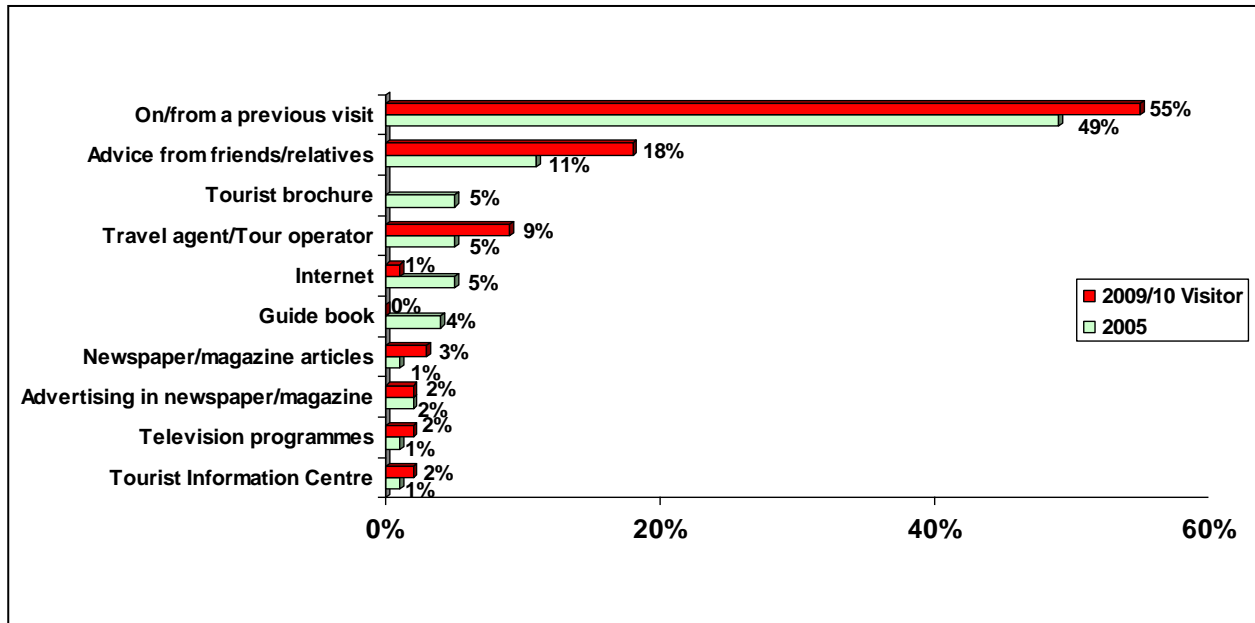
Base: Visitors: 1937 Q7;
Source CELLO **mruk** research

The two most important sources of information that people stated **influenced their decision** to visit the Cairngorms National Park were on/from a previous visit (55% - 49% was recorded in the 2003/04 results) and advice from friends/relatives (18% - 11% in 2003/04).

Table 23: Which sources of information, if any would you say was most important in influencing your decision to visit the Cairngorms National Park? (Figures in brackets refer to 2003/04 results)

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1937 (2083)	413 (514)	599 (479)	925 (1090)
On/from a previous visit	55% (49%)	80% (60%)	62% (56%)	39% (42%)
Advice from friends/relatives	18% (11%)	9% (8%)	19% (12%)	21% (12%)
Tourist brochure	- (5%)	- (1%)	1% (5%)	- (7%)
Travel agent/Tour operator	9% (5%)	0% (2%)	6% (3%)	14% (8%)
Internet	2% (5%)	2% (5%)	2% (4%)	2% (5%)
Guide book	1% (4%)	- (3%)	- (2%)	1% (5%)
Newspaper/magazine articles	3% (2%)	1% (1%)	1% (2%)	5% (2%)
Advertising in newspaper/magazine	2% (2%)	1% (2%)	1% (2%)	3% (2%)
Television programmes	3% (1%)	- (0%)	2% (1%)	4% (1%)
Tourist Information Centre	2% (1%)	- (1%)	1% (0%)	3% (1%)
None of these	5% (10%)	7% (12%)	4% (9%)	5% (9%)
Other	1% (5%)	- (5%)	1% (5%)	3% (6%)

Figure 8: Which source of information, if any would you say was most important



Base: Visitors: 1937 Q7a;
Source CELLO **mruk** research

3.8 Transportation

When travelling to the Cairngorms the use of a private car was cited by 71% (70% in 2003/04) of all visitor and resident respondents with a further 6% (11% in 2003/04) coming by private bus/coach tour and 9% stating they used a hired car to get to the National Park.

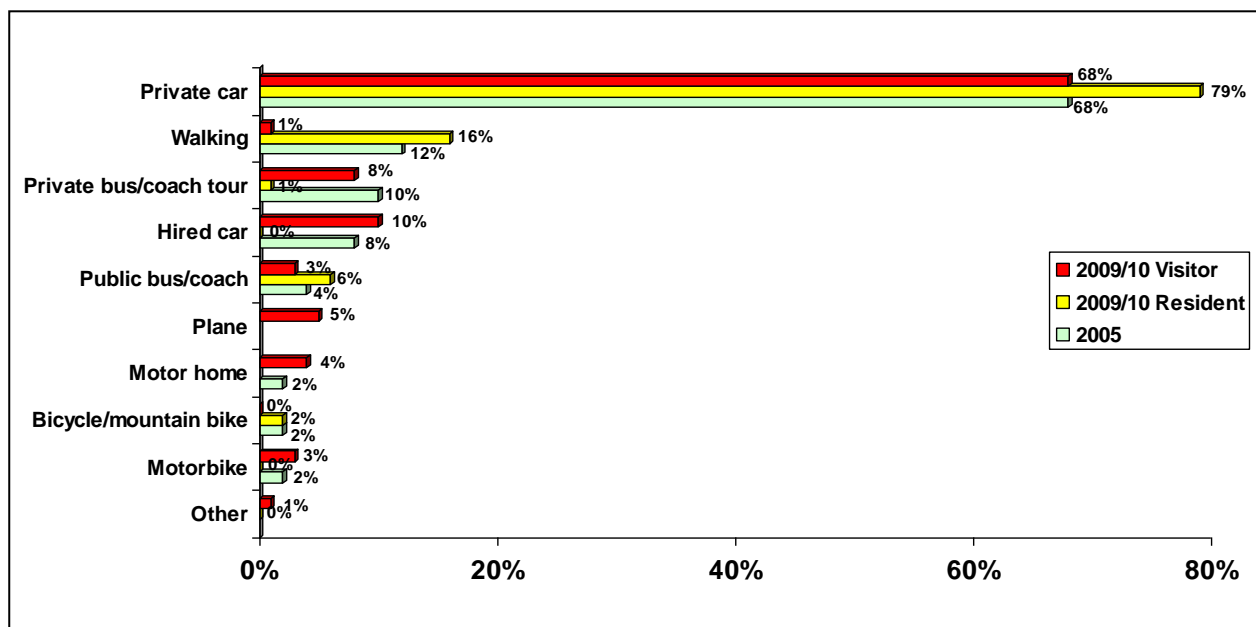
Table 24: Which form(s) of transport did you use to get to the Cairngorms National Park? (Figures in brackets refer to 2003/04 results)

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1937 (2083)	413 (514)	599 (479)	925 (1090)
Private Car/Hired Car	78% (78%)	90% (86%)	75% (82%)	76% (74%)
Private car	68% (70%)	90% (82%)	73% (76%)	56% (62%)
Hired car	10% (8%)	0% (4%)	2% (6%)	20% (12%)
Bus/Coach	11% (14%)	5% (9%)	14% (14%)	12% (17%)
Private bus/coach tour	8% (11%)	2% (7%)	10% (10%)	10% (14%)
Public bus/coach	3% (3%)	3% (2%)	4% (4%)	2% (3%)
Motor home	4% (2%)	0% (1%)	3% (1%)	6% (3%)
Train	2% (2%)	0% (1%)	4% (1%)	2% (2%)
Motorbike	3% (2%)	3% (2%)	4% (1%)	2% (2%)
Plane	5% (-)	0% (-)	2% (-)	10% (-)

When considering the type of transport used to travel within the Cairngorms National Park, once again the private car/hired car is the most common means of transport, with 80% of visitor respondents citing this. The next most popular means of transport within the National Park is walking, 12% of respondents indicating this. This is followed by bus/coach (11%).

With regard to the type of transport overseas visitors uses to get to the Cairngorms, 65% indicated that they used a private car/hired car. The questionnaire does not ask the respondents means of travel to Scotland only whilst in the Country.

Figure 9: On your short trip from home/day trip from home/day out whilst staying away from home, which form(s) of transport, if any, have you used or will use in the Cairngorms National Park?



Base: Visitors: 1937 Q9 / Residents: 563 Q3

Source: CELLO **mruk** research

Table 25: On your short trip from home/day trip from home/day out whilst staying away from home, which form(s) of transport, if any, have you used or will use in the Cairngorms National Park? (Figures in brackets refer to 2003/04 results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
Private car/Hire car	80% (76%)	79% (82%)	87% (71%)	76% (79%)	79% (74%)
Private car	71% (68%)	79% (76%)	87% (68%)	73% (75%)	57% (61%)
Hired car	9% (8%)	0% (6%)	0% (3%)	3% (4%)	22% (13%)
Bus/Coach	10% (14%)	7% (10%)	5% (9%)	15% (15%)	12% (17%)
Private bus/coach tour	6% (10%)	1% (5%)	2% (7%)	10% (11%)	10% (13%)
Public bus/coach	4% (4%)	6% (5%)	3% (2%)	5% (4%)	2% (4%)
Walking	13% (12%)	16% (9%)	7% (28%)	10% (8%)	15% (7%)
Motor home	3% (2%)	0% (2%)	0% (0%)	2% (0%)	6% (4%)
Bicycle/mountain bike	2% (2%)	2% (3%)	1% (1%)	1% (1%)	2% (1%)
Motorbike	2% (2%)	0% (3%)	3% (2%)	4% (2%)	2% (2%)

3.9 Activities

When asked “On this day trip/this trip away from home in the Cairngorms National Park, which activities, if any have you or will you take part in”, 72% (56% in 2003/04) of all respondents indicated that they would undertake some general sightseeing. This is followed by 37% (48% in 2003/04) of respondents who said they will undertake some form of high or low level walking. Age of respondent is a strong determinant in the likelihood of them participating in more active activities. For example younger respondents, that is those aged between 16 and 24 years are considerably more likely to participate in active pursuits such as high level climbing, skiing and water sports compared to older respondents i.e. those aged 65+ years.

When looking at activities such as low level walking, the differences in participation tend to diminish with a similar percentage of young people and older respondents indicating that they have or will participate in these activities, although the figure does drop noticeably for those aged 65 or over. When considering the type of trip that people are on, a variety of different patterns emerge. For instance longer break respondents are very likely to be taking part in low level walking, whereas visitors on a day trip are far less likely to take part in low level walking. Those respondents from overseas also see this as a popular activity.

Overall, for all respondents, general sightseeing/relaxing is the most popular activity (76%) and particularly with people from Europe (85%) and overseas (93%). Respondents from overseas are also more likely than others to take photographs (45%). Skiing was most commonly done by day trippers (34%) and visitors who were there with friends or on their own.

Table 26: On this day trip/this trip away from home in the Cairngorms National Park, which activities, if any have you or will you take part in? (2009/10 results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500	563	413	599	925
General Sightseeing/Just Relaxing	76%	59%	48%	75%	89%
Eating out	19%	20%	15%	18%	21%
Walking – high level	12%	4%	5%	9%	16%
Walking – low level	29%	18%	10%	25%	41%
Climbing/Mountaineering	2%	0%	2%	3%	2%
Cycling/ Mountain Biking	5%	3%	1%	4%	8%
Taking photographs	26%	6%	12%	21%	35%
Visiting attractions (e.g. castles, museums, whisky, outdoor activity park, transport ride, etc)	30%	20%	29%	26%	33%
Watching wildlife	18%	8%	19%	12%	25%
Water sports	2%	1%	3%	2%	2%
Golf	1%	3%	0%	1%	2%
Skiing/Winter sports	17%	14%	34%	21%	7%
Other	7%	28%	7%	10%	6%

Table 27: On this day trip/this trip away from home in the Cairngorms National Park, which activities, if any have you or will you take part in? (2003/04 results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500	417	514	479	1090
General sightseeing	56%	35%	29%	59%	76%
Walking*	48%	50%	43%	52%	48%
Hill walking	26%	41%	22%	25%	22%
Low level walking (2 miles +)	24%	13%	17%	27%	30%
Low level walking (<2 miles)	17%	5%	14%	25%	21%
Heritage*	22%	14%	9%	19%	33%
Visiting 'heritage' sites – castles, monuments, churches etc	15%	3%	6%	13%	26%
Visiting artistic or heritage exhibits – museums, art galleries, heritage centres etc	12%	3%	4%	9%	21%
Watching performing arts – theatre/cinema/concert/opera/ballet	2%	8%	0%	1%	2%
Photography	11%	14%	4%	8%	15%
Having a picnic/barbecue	10%	7%	10%	7%	12%
Visiting a theme park or activity park	7%	4%	4%	4%	10%
Field study/nature study/bird or wildlife watching – on my own	7%	2%	4%	4%	11%
Active Pursuits*	20%	35%	11%	19%	14%
Climbing/mountaineering	2%	1%	2%	3%	3%
Mountaineering	2%	11%	1%	0%	11%
Jet skiing	1%	3%	0%	1%	1%
Cycling – on road	3%	2%	2%	3%	3%
Cycling – off road	5%	7%	3%	5%	5%
Skiing – downhill	7%	9%	11%	8%	4%
Skiing – telemark	1%	1%	2%	0%	0%
Skiing - ski touring	1%	1%	0%	1%	0%
Skiing – Nordic	2%	8%	1%	0%	0%
Snowboarding	3%	3%	7%	4%	1%
Golfing	5%	4%	0%	7%	6%
Indoor swimming	5%	12%	1%	5%	5%
Multi-activity package	1%	2%	0%	0%	0%
Horse riding/pony trekking	2%	4%	1%	0%	2%
Field study/nature study/bird or wildlife watching – in a group	2%	2%	1%	3%	1%
Some other particular hobby/special interest holiday	2%	1%	2%	3%	3%

* Various activities have been amalgamated to create the categories, Walking, Heritage and Active Pursuits. The total for these categories is less than the sum of the activities as some people will undertake more than 1 activity.

* Different question options were used in the 2003/04 survey.

When asked what would be their **main** activity on this trip away from home, the majority of respondents stated that it would be general sightseeing (50%). Not surprisingly this was lowest amongst day trippers (26%) and more prominent amongst those on a longer break (59%). Thereafter respondents were participating in a range of activities. Over 1 in 10 (15%) mentioned skiing and a further 7% said low level walking. Visiting attractions was mentioned by nearly 1 in 10 respondents (9%).

Day trippers were certainly the main skiing group in the survey with a third stating that this was going to be their main activity – day trippers were also the most likely to say that they would be visiting attractions as their main activity. Eating out and low level walking was most commonly mentioned amongst residents.

Table 28: On this day trip/this trip away from home in the Cairngorms National Park which activity was or will be the main activity for you? (2009/10 Results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500	563	413	599	925
General Sightseeing/Just Relaxing	50%	40%	26%	49%	59%
Eating out	4%	9%	3%	2%	1%
Walking – high level	5%	2%	3%	5%	7%
Walking – low level	7%	10%	2%	7%	6%
Climbing/Mountaineering	1%	0%	0%	2%	2%
Cycling/ Mountain Biking	2%	2%	1%	1%	2%
Taking photographs	1%	1%	1%	1%	2%
Visiting attractions (e.g. castles, museums, whisky, outdoor activity park, transport ride, etc)	9%	12%	17%	4%	5%
Watching wildlife	3%	2%	3%	2%	4%
Water sports	1%	1%	2%	2%	1%
Golf	1%	3%	0%	2%	1%
Skiing/Winter sports	15%	13%	33%	18%	5%
Other	1%	5%	9%	5%	7%

Table 29: On this day trip/this trip away from home in the Cairngorms National Park which activity was or will be the main activity for you? (2003/04 Results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500	417	514	479	1090
General sightseeing	38%	14%	22%	41%	54%
Walking	19%	5%	30%	24%	16%
Hill walking	10%	3%	15%	13%	8%
Low level walking (2 miles +)	7%	1%	11%	9%	6%
Low level walking (<2 miles)	2%	1%	4%	2%	2%
Heritage	3%	4%	4%	3%	3%
Visiting 'heritage' sites – castles, monuments, churches etc	1%	0%	1%	2%	2%
Visiting artistic or heritage exhibits – museums, art galleries, heritage centres etc	1%	0%	3%	0%	2%
Watching performing arts – theatre/cinema/concert/opera/ballet	1%	4%	0%	0%	0%
Active Pursuits	13%	15%	22%	14%	7%
Mountaineering	0%	0%	1%	0%	0%
Climbing/mountaineering	1%	0%	1%	1%	1%
Cycling – off road	2%	4%	1%	2%	1%
Cycling – on road	1%	2%	1%	1%	0%
Jet skiing	0%	0%	0%	0%	0%
Skiing – downhill	6%	7%	10%	6%	3%
Skiing – Nordic	0%	0%	1%	0%	0%
Skiing – telemark	0%	0%	2%	0%	0%
Snowboarding	3%	2%	6%	3%	1%
Horse riding/pony trekking	2%	10%	0%	0%	0%
Golfing	2%	2%	0%	3%	2%
Visiting a theme park or activity park	1%	0%	3%	0%	1%
Having a picnic/barbecue	1%	0%	3%	0%	0%
Some other particular hobby/special interest holiday	1%	0%	1%	1%	1%
Tennis	1%	4%	0%	0%	0%

* Different question options were used in the 2003/04 survey.

3.10 Towns and Attractions Visited

Visitors to the Cairngorms National Park were asked which towns/villages have they/do they intend to visit on their trip. The seven most popular towns/villages visited were as follows (interim results are provided in *italics* and 2003/04 results are provided in brackets):

	2009/10	Interim	2003/04
■ Aviemore	46%	50%	(45% in 2003/04)
■ Braemar	29%	29%	(23% in 2003/04)
■ Ballater	25%	22%	(21% in 2003/04)
■ Grantown-on-Spey	15%	19%	(25% in 2003/04)
■ Blair Atholl	10%	12%	
■ Kingussie	9%	13%	(18% in 2003/04)

The most popular town/village across all of the visitor types was Aviemore. Fifty percent (61% in 2003/04) of visitors on a longer break indicated that they had visited this town, compared to only 30% (20% in 2003/04) of day trippers.

As already stated, Aviemore is the most popular town/village visited by people staying 5+ nights away from home. However, they will also visit a variety of other towns/villages including Grantown on Spey (21%), Kingussie (13%) and Braemar (37%). Overall the popularity of towns and villages such as Braemar, Ballater, Blair Atholl, Boat of Garten and Coylum Bridge have increased while settlements such as Grantown, Kingussie, Carrbridge, Newtonmore, Laggan, Tomintoul and Nethy Bridge has decreased.

Table 30: So far on this day out/visit to the Cairngorms National Park which town/villages, if any, have you/do you intend to visit? (Figures in brackets refer to 2003/04 results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
Aviemore	46% (45%)	34% (26%)	30% (20%)	50% (51%)	50% (61%)
Grantown-on-Spey	15% (25%)	10% (10%)	11% (10%)	12% (29%)	21% (36%)
Braemar	29% (23%)	17% (15%)	15% (12%)	29% (28%)	37% (29%)
Ballater	25% (21%)	23% (21%)	13% (10%)	23% (25%)	29% (24%)
Kingussie	9% (18%)	5% (6%)	4% (5%)	6% (18%)	13% (30%)
Tomintoul	* (18%)	1% (7%)	3% (5%)	1% (19%)	1% (28%)
Carrbridge	7% (17%)	4% (8%)	10% (11%)	4% (16%)	9% (24%)
Newtonmore	8% (17%)	6% (6%)	3% (6%)	7% (16%)	12% (26%)
Laggan	2% (9%)	2% (4%)	1% (4%)	1% (7%)	4% (14%)
Nethy Bridge	3% (8%)	1% (2%)	0% (2%)	3% (8%)	4% (13%)
Dalwhinnie	1% (4%)	0% (2%)	0% (1%)	1% (4%)	2% (7%)
Blair Athol	10%	7%	3%	10%	14%
Boat of Garten	5%	3%	1%	3%	9%
Coylumbridge	4%	1%	2%	5%	6%
Other	2% (8%)	8% (12%)	26% (15%)	9% (5%)	4% (4%)
None of these	5% (15%)	7% (23%)	21% (40%)	2% (5%)	0% (5%)

Table 31: So far on this day out/visit to the Cairngorms National Park which town/villages, if any, have you/do you intend to visit?

	2009/10 Visitor	2009/10 Resident	2003/04
Aviemore	46	34	45
Grantown-on-Spey	16	10	25
Braemar	30	17	23
Ballater	24	23	21
Kingussie	9	5	18
Tomintoul		2	18
Carrbridge	7	4	17
Newtonmore	8	6	17
Laggan	2	2	9
Nethy Bridge	3	1	8
Dalwhinnie	1		4
Other	25	16	8

Base: Visitors: 1937 Q11 / Residents: 563 Q5

Source: CELLO **mruk** research

3.11 Ranger Bases

Twenty eight percent (26% in 2003/04) of all respondents indicated that they had visited at least one of the Ranger Bases indicated. Respondents most likely to have visited a ranger base are those on a longer trip away from home, of whom 43% (32% in 2003/04) stated that they had visited at least one of the bases. On the other hand only 12% of day tripper visitors and 15% of day tripper residents indicated that they had or intended to visit a Ranger Base.

The most popular visited are:

- Cairngorm - 11% (2% in 2003/04), especially amongst those on a longer break
- Rothiemurchus - 5% (7% in 2003/04), especially amongst those on a longer break
- Mar Lodge - 7% (4% in 2003/04), especially amongst those on a longer break
- Glen Muick, Balmoral - 3% (6% in 2003/04)

Table 32: Which, if any, of these Ranger Bases have you/will you visit during this visit/day out in the Cairngorms National Park? (Figures in brackets refer to 2003/04 results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
Rothiemurchus	5% (7%)	2% (5%)	0% (1%)	5% (5%)	9% (10%)
Glen Muick, Balmoral	3% (6%)	1% (6%)	1% (4%)	3% (5%)	4% (7%)
Glenmore Forest Park	2% (6%)	1% (5%)	0% (2%)	2% (7%)	2% (8%)
Loch Garten	2% (5%)	* (4%)	0% (2%)	1% (3%)	4% (8%)
Mar Lodge	7% (4%)	1% (3%)	2% (1%)	7% (5%)	12% (6%)
Braeloine/ Glen Tanar	3% (2%)	1% (3%)	1% (2%)	2% (3%)	5% (1%)
Coire Cas/ Cairngorm	11% (2%)	5% (2%)	6% (1%)	13% (3%)	16% (3%)
Glenlivet Estate	2% (2%)	1% (1%)	0% (1%)	2% (1%)	5% (3%)
Atholl Estates	2% (1%)	1% (0%)	1% (0%)	2% (0%)	4% (1%)
Killiecrankie	0% (1%)	- (0%)	0% (0%)	0% (0%)	1% (1%)
Braedownie/ Glen Doll	3% (0%)	2% (0%)	1% (1%)	2% (0%)	5% (0%)
None	72% (74%)	85% (75%)	88% (87%)	70% (75%)	57% (68%)

Table 33: Ranger bases visited

	2009/10 Visitor	2009/10 Resident	2003/04
Rothiemurchus	6	2	7
Glen Muick, Balmoral	3	1	6
Glenmore Forest Park	2	1	6
Loch Garten	2	0	5
Mar Lodge	8	1	4
Braeloine, Glen Tanar	-	-	2
Coire Cas, Cairngorm	-	-	2
Glenlivet Estate	32	1	2
Atholl Estates	2	1	1
Killiecrankie	1	-	1
Braedownie, Glen Doll	-	-	0
None	68	85	74

Base: Visitors: 1937 Q11 / Residents: 563 Q6

Source: CELLO **mruk** research

3.12 Information

Forty two percent of all respondents indicated that they got information from somewhere during their visit to the Cairngorms. The incidence of getting information rose to 62% (32% in 2003/04) of visitors staying 5 or more nights away from home and 43% (22% in 2003/04) for those people on a short break. Residents were least likely to look for information with only 7% stating this.

For those people who did get information from somewhere on this trip, the main source was a leaflet display (20%) and a Tourist Information Centre (17%, compared to 58% saying this in 2003/04). For those respondents who mentioned getting information from a Tourist Information Centre this was most common amongst long-stay visitors (35%) and those from Europe (49%) and the rest of the world (43%). There are differences between the results from the two surveys and this could be related to the different way the questions were asked. For the 2009/10 survey a direct question was asked of everyone but for the 2003/04 survey the questions was routed from a lead in question and thus differences in % terms will most likely relate to the far smaller base sizes for this question in the 2003/04 survey.

Table 34: Have you picked up tourist information from any of the following sources during your visit to the Cairngorms? (2009/10 Results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500	563	413	599	925
Tourist information Centre	17%	2%	3%	15%	35%
Visitor attraction	11%	3%	7%	10%	17%
Leaflet display	20%	3%	10%	25%	32%
Information from tourist businesses	1%	-	0%	1%	3%
Guide books	6%	0%	0%	3%	14%
Tourist brochure	3%	-	-	4%	6%
Mobile phone / Personal handheld assistant (PDA)	0%	1%	-	*	*
None	58%	93%	82%	57%	28%
Other	0%	-	-	-	*

A key difference between the table above and the table below is that there is a very much higher proportion of respondents saying 'none' in the table above compared to those saying this in the 2003/04 table below – again this is related to the way the questions were routed and as such it is difficult to make any conclusions on why these differences exist. The closest way to compare would be to look at removing the 'none' response from both sets of data. When this is done the percentage of respondents, for example, getting information from a Tourist Information Centre rises to 42% for 2009/10 and for Leaflet displays rises to 48%.

Table 35: If so, where did you get your information from? (2003/04 Results)

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	618	65	97	105	351
Tourist information centre	58%	52%	21%	64%	65%
Orientation centre/visitor centre	32%	25%	24%	27%	37%
Unmanned information points	11%	0%	37%	10%	5%
Information at my accommodation	13%	0%	6%	28%	14%
Guide books	2%	3%	1%	0%	3%
Tourist brochure	3%	12%	0%	0%	3%
None	3%	0%	3%	2%	4%
Other	12%	17%	15%	1%	11%

* Different question asked in 2003/04

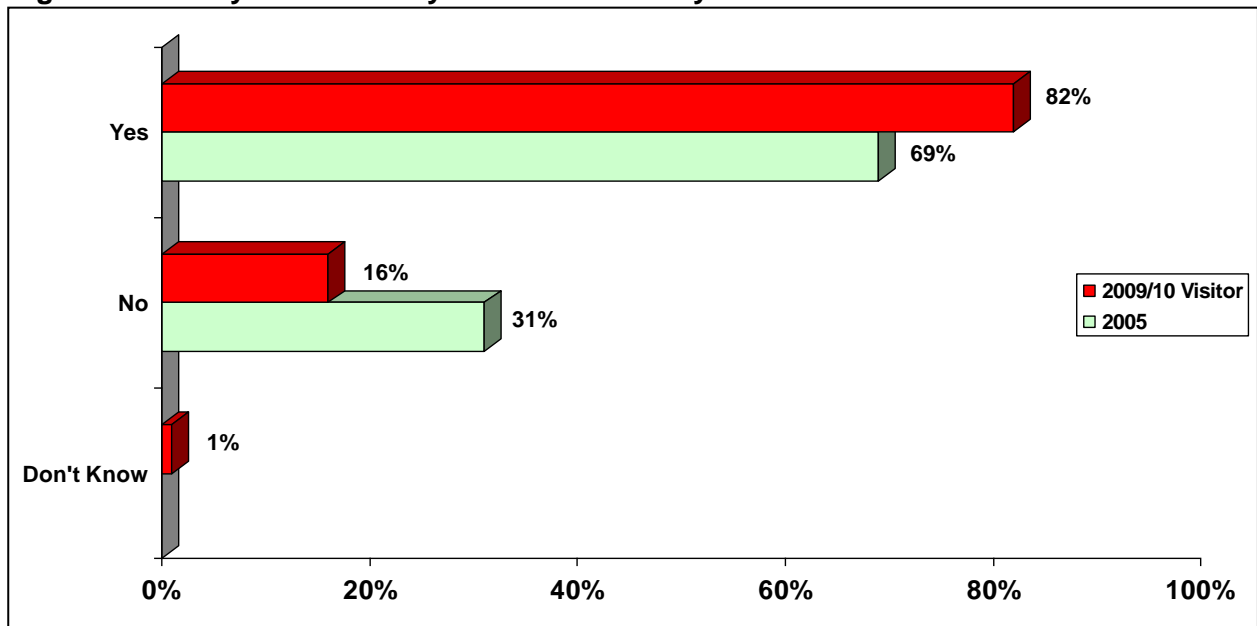
3.13 National Park

Eighty two percent (69% in 2003/04) of all visitors said that they were aware that they were in a National Park. Responses between the various types of visitor remain fairly similar although importantly awareness is up in all visitor categories by a minimum of 10 percentage points – for day trippers awareness is up on 2003/04 by 19 points.

Table 36: Can you tell me if you are aware that you are in a National Park? (Figures in brackets refer to 2003/04 results)

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1937 (2083)	413 (514)	599 (479)	925 (1090)
Yes	82% (69%)	87% (68%)	84% (70%)	79% (69%)
No	16% (31%)	11% (32%)	14% (30%)	19% (31%)
Don't know	1% (-)	2% (-)	1% (-)	1% (-)

Figure 10: Can you tell me if you are aware that you are in a National Park?



Base: Visitors: 1937 Q12

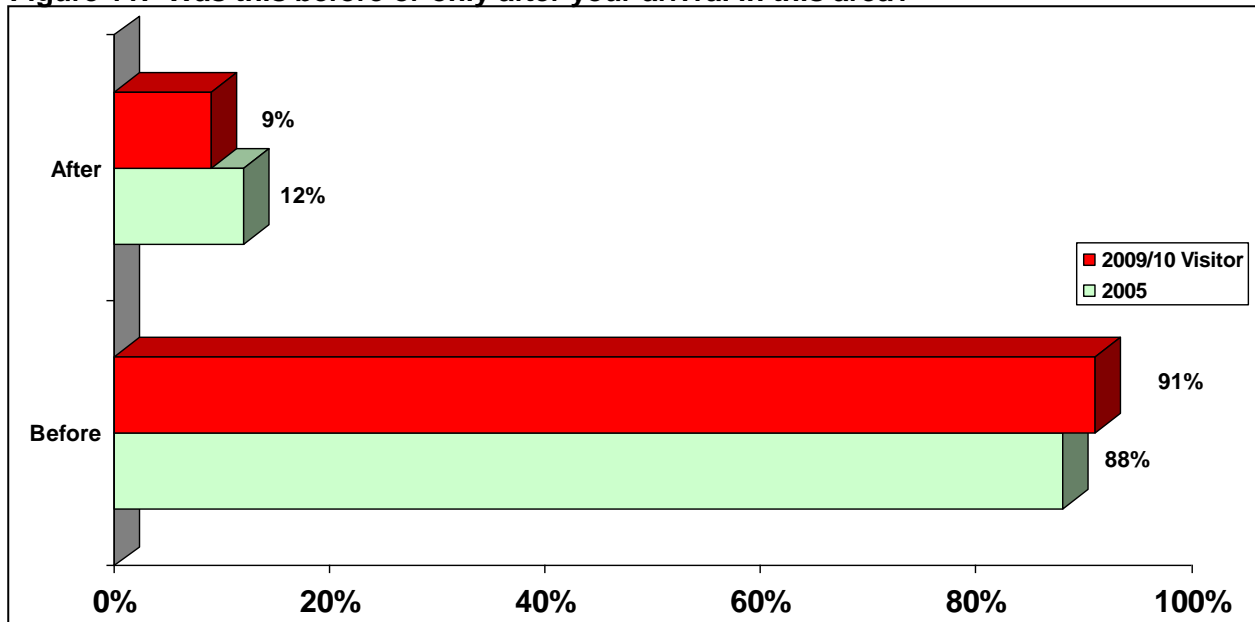
Source: CELLO **mruk** research

Ninety one percent (88% in 2003/04) of visitors who were aware that they were in a National Park said that they knew this before arriving in the area. Visitors on a longer break away from home are most likely to state that they only became aware of the fact that they were in a National Park after they arrived in the area, 14% (18% in 2003/04) stated this.

Table 37: If yes, was this before or only after your arrival in this area? (Figures in brackets refer to 2003/04 results)

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1598 (1439)	359 (349)	506 (337)	733 (753)
Before	91% (88%)	98% (99%)	93% (90%)	86% (82%)
After	9% (12%)	2% (1%)	7% (10%)	14% (18%)

Figure 11: Was this before or only after your arrival in this area?



Base: Visitors: 1598 Q13

Source: CELLO **mruk** research

The two main means by which visitors first became aware that the area is a National Park are from a brochure/guide book (28%, compared to 21% in 2003/04) and from friends/relatives (17%, compared to 10% in 2003/04). The results from 2003/04 had from a newspaper/magazine article (30% in 2003/04) and a television programme (30% in 2003/04) as the two most commonly mentioned methods.

For visitors spending 5 nights or more away from home, the most common methods for them to find out that they were in a National Park was a brochure/guide book (38%,

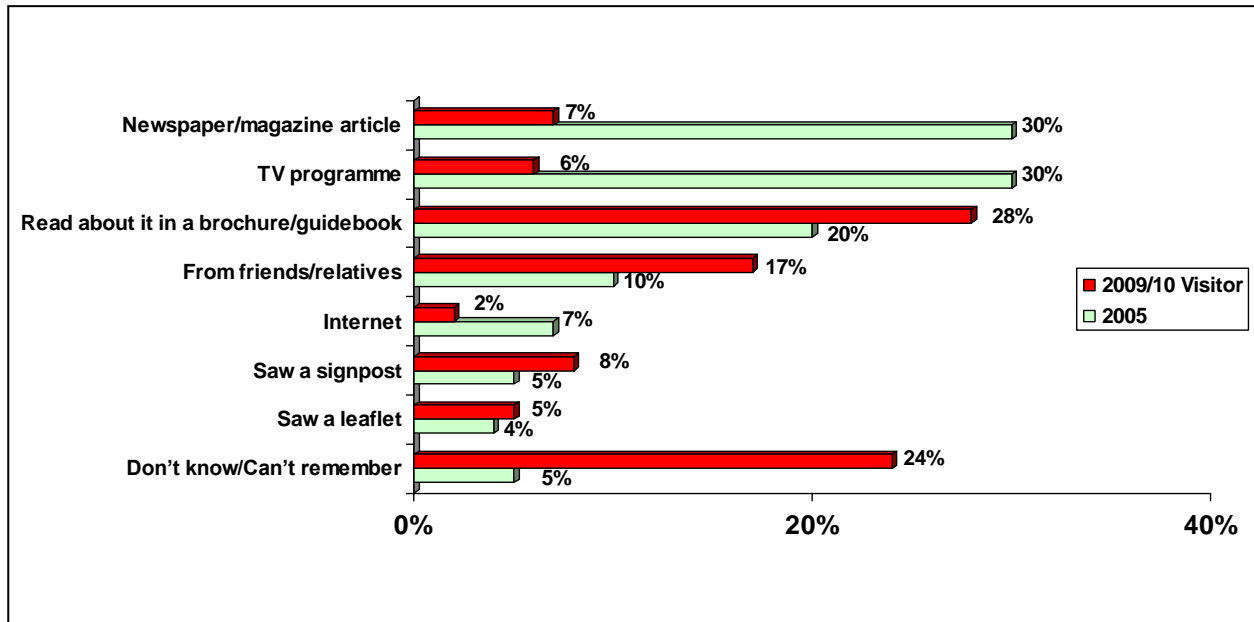
compared to 24% in 2003/04) and friends and relatives (17%). Forty nine percent (26% in 2003/04) of visitors from overseas stated that brochure/guidebook were most significant.

The internet is only mentioned by 2% of all visitors. In addition to this sign posting is mentioned by 8% of respondents.

Table 38: How did you first become aware that this is a National Park? (Figures in brackets refer to 2003/04 results)

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1598 (1439)	359 (349)	506 (337)	925 (753)
Newspaper/magazine article	7% (30%)	12% (38%)	6% (34%)	6% (24%)
TV programme	6% (30%)	9% (40%)	6% (33%)	4% (24%)
Read about it in a brochure/guidebook	28% (20%)	16% (12%)	21% (18%)	38% (24%)
From friends/relatives	17% (10%)	14% (7%)	14% (10%)	17% (11%)
Internet	2% (7%)	1% (3%)	3% (4%)	3% (11%)
Saw a signpost	8% (5%)	6% (4%)	8% (4%)	8% (5%)
Don't know/Can't remember	24% (5%)	34% (1%)	29% (6%)	15% (6%)
Saw a leaflet	5% (4%)	2% (3%)	4% (4%)	7% (5%)
Other	3% (25%)	6% (20%)	9% (21%)	2% (29%)

Figure 12: How did you first become aware that this is a national park?



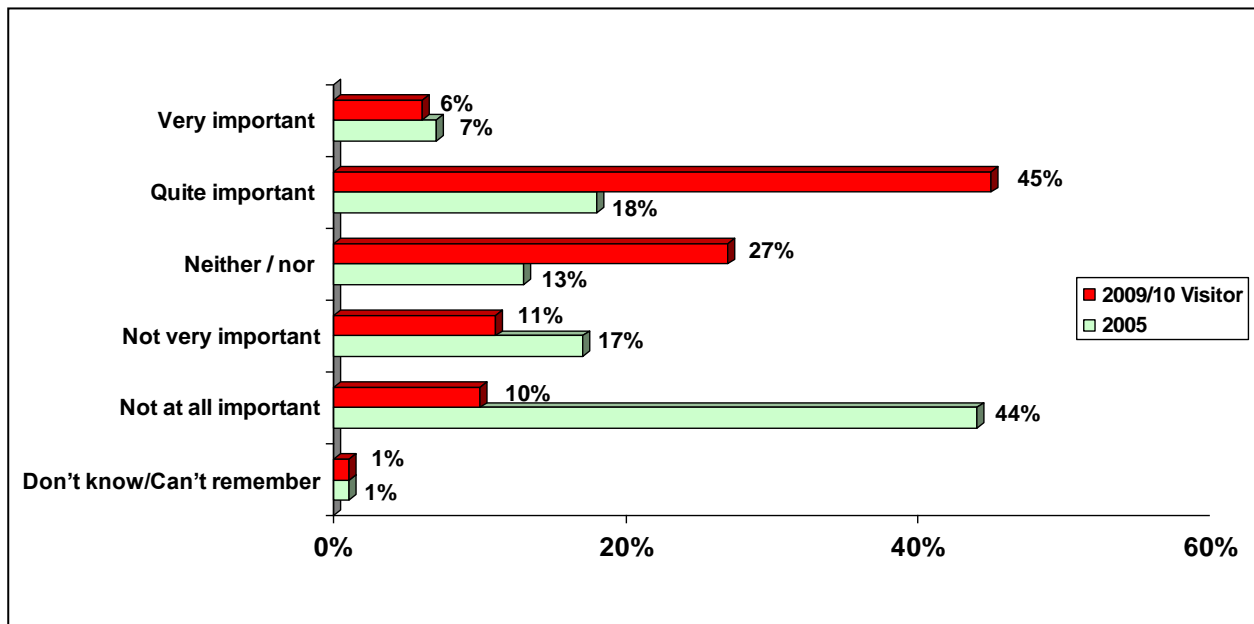
Base: Visitors: 1598 Q14
Source: CELLO **mruk** research

The influence of the area being a National Park over people’s decision to visit the area is cited as being very or quite important by 51% (far higher than the 25% recorded in 2003/04) of respondents. Only twenty one percent (compared to a far higher 61% recorded in 2003/04) said that it was not very or not at all important and a further 27% said it was neither important nor unimportant. Clearly there are some very sizable changes in opinion for this question and certainly shows a large change in the views of visitors.

Table 39: In your decision to visit the Cairngorms National Park how important was the fact that this area is a National Park? (Figures in brackets refer to 2003/04 results)

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1598 (1439)	359 (349)	506 (337)	733 (753)
Very important	6% (7%)	4% (9%)	4% (5%)	7% (7%)
Quite important	45% (18%)	30% (10%)	41% (19%)	56% (22%)
Neither/nor	27% (13%)	41% (12%)	30% (14%)	18% (13%)
Not very important	11% (17%)	14% (15%)	12% (18%)	8% (17%)
Not at all important	10% (44%)	9% (52%)	12% (44%)	12% (40%)
Don't know	1% (1%)	1% (1%)	1% (0%)	1% (1%)

Figure 13: In your decision to visit the Cairngorms area how important was the fact that this area is a National Park?



Base: Visitors: 1598 Q15
Source: CELLO **mruk** research

Respondents were asked to describe the National Park logo and table 37b outlines the findings to this new question. The question was asked with no visual or verbal prompts and the key element remembered was that of an eagle (29%) or bird (15%) with 46% able to provide an answer.

Table 39b: Can you describe the Cairngorms National Park logo?

	Total	Residents	Visitors
Base Number	2500	563	1937
Eagle	29%	24%	49%
Bird	15%	12%	23%
Purple	2%	2%	2%
Sunset	1%	1%	1%
Other	1%	1%	2%
Don't know	54%	63%	25%

Respondents were then asked to describe what they felt the logo conveyed. The question was asked with a visual prompt and the key mentions were:

- Wildlife/birdlife (30% for residents and 23% for visitors)
- Eagle (4% for residents and 8% for visitors)
- Conservation (7% for residents and 5% for visitors)
- Wildness (5% for residents and 6% for visitors)
- Freedom (7% for residents and 4% for visitors)
- Nature/nature reserve (7% for residents and 5% for visitors)
- Ospreys (6% for residents and 4% for visitors)
- Don't know (18% for residents and 30% for visitors)

3.14 Likes and Improvements

The main likes, as would be expected, revolve around the scenery of the area, with 34% of visitors mentioning this. In addition to this visitors also mentioned the hills/mountains (19%), variety of attractions/activities (12%) and the peace and quiet (10%). A variety of other aspects were also mentioned mostly relating to skiing (8%), natural beauty (8%), the wildlife (7%); walking/climbing (6%); open space (5%) and friendly people (6%).

Table 40: What do you like most about the Cairngorms National Park? (2009/10 Results)

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1937	413	599	925
Peace and quiet	10%	6%	11%	10%
Scenery	34%	31%	34%	36%
Open space	5%	6%	4%	5%
Friendly people	6%	3%	7%	6%
Fresh air	1%	2%	1%	2%
Easy to get to	1%	1%	2%	*
Breath taking views	2%	2%	2%	2%
Weather / mist / snow	4%	5%	3%	5%
Mountains / hills	19%	18%	16%	22%
Trees / woods	2%	1%	1%	2%
Good varieties of activities	12%	17%	13%	9%
Walking / hill walking / climbing	6%	4%	7%	6%
Wildlife	7%	4%	6%	10%
Nice area	1%	1%	1%	1%
Rivers / streams / lochs	4%	4%	4%	4%
Natural beauty	8%	7%	7%	8%
Able to relax	2%	1%	4%	2%
Ruggedness of the countryside	3%	5%	2%	2%
Countryside	2%	3%	2%	2%
Good for cycling	1%	1%	1%	1%
Its looked after / clean	1%	0%	2%	1%
Fishing	1%	0%	0%	1%
Golf courses	1%	0%	0%	1%
Mountain biking	1%	0%	1%	1%
Wildness of area	4%	1%	2%	6%
Castles / museums	1%	0%	1%	2%
Winter sports	1%	4%	1%	0%
Nature	1%	1%	*	1%
Birds	1%	0%	0%	1%
Everything / Scotland	1%	0%	0%	1%
Skiing	8%	15%	10%	3%
Unspoilt	1%	3%	2%	1%
Don't know	2%	1%	1%	2%
Other	8%	8%	8%	8%

Table 41: What do you like most about the Cairngorms National Park? (2003/04 Results)

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2083	514	479	1090
Beautiful views and scenery/spectacular	46%	44%	48%	46%
The hills/wide spaces, rugged, mountains	27%	24%	29%	28%
Peacefulness, easy going pace of life	25%	25%	25%	24%
The trees and colours of the landscape	13%	6%	10%	17%
Nice walks, good hill walking	11%	15%	13%	9%
Fresh and clean area, unspoilt	11%	8%	11%	12%
Wildlife, plants, animals/deer/birds	11%	13%	8%	11%
Friendly people	9%	4%	7%	12%
Picturesque, very beautiful place	9%	8%	11%	9%
Lots of things to do, different activities, active/relaxing	9%	13%	11%	7%
Large open spaces without seeing anyone	7%	8%	6%	5%
The water/lochs/waterfalls	6%	3%	4%	8%
Rugged and wild	5%	9%	5%	4%
Skiing	5%	11%	6%	2%
Other	3%	3%	2%	3%
Unspoilt – natural heritage/beauty	3%	2%	2%	3%
Easy to get to, central	3%	7%	2%	2%
Snow on hills/mountains	3%	5%	3%	2%
No traffic jams/quiet roads	2%	1%	1%	3%
Weather when it is nice	1%	1%	1%	2%
Golf	1%	0%	1%	1%
Roads good	1%	1%	1%	1%
Culture and history of Scotland	1%	0%	2%	2%
Distilleries	1%	1%	1%	1%
Mountains/Munros	1%	1%	1%	1%
The cycle tracks	1%	1%	0%	1%
Family from area	1%	1%	2%	1%
Fresh food	1%	1%	2%	1%

* Different coding frame used in 2003/04

Just over two fifths of all visitors (43%) said that nothing at all could have been improved to make their visit to the Cairngorms National Park more enjoyable. The three most commonly cited improvements were:

- Weather/snow 4%
- Improve quality and choice of shops 4%
- Upgrade A9 3%
- Better signs 3%
- Dual carriageway on the A9 3%
- Better/cheaper accommodation 2%

Table 42: What, if anything, could have been improved to make your visit to the Cairngorms National Park more enjoyable?

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1937	413	599	925
Weather / snow	4%	2%	4%	5%
Cheaper / better accommodation	2%	1%	1%	2%
Road surfaces / new roads / better roads	2%	5%	2%	1%
Upgrade A9 / dual carriageway	3%	5%	4%	2%
No midges	1%	*	1%	1%
More toilets / free	1%	1%	2%	1%
Longer opening times for cafes / shops	1%	0%	1%	0%
Signs	3%	5%	2%	2%
Improve quality and choice of shops / cafes / restaurants	4%	2%	4%	4%
No fees / cheaper for attractions	2%	2%	2%	1%
More attractions at night	0%	0%	1%	1%
More litter bins / clean it up	0%	0%	0%	1%
Less people / children	1%	1%	1%	*
More parking / cheaper	1%	1%	1%	1%
Mountain biking facilities	0%	1%	0%	0%
Cheaper restaurants / shops	1%	0%	2%	1%
Better Wi-Fi / TV / phone / broadband signal	0%	0%	0%	1%
Indoor activities when the weather is bad	1%	0%	1%	1%
Public transport needs improving i.e. transport links, times etc	1%	1%	2%	1%
Other	3%	5%	3%	1%
Nothing	36%	40%	37%	33%
Don't know	34%	28%	29%	40%

Table 43: What, if anything, could have been improved to make your visit to the Cairngorms National Park more enjoyable? (2003/04 Results)

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2083	514	479	1090
Nothing at all	52%	49%	53%	52%
More public toilets/better public toilets	3%	6%	2%	2%
Better weather	3%	2%	6%	3%
Better hotel accommodation	2%	1%	3%	2%
More coffee shops/places to have tea/coffee	2%	3%	2%	2%
More sign posts	2%	1%	2%	2%
Free parking	2%	3%	1%	1%
More roads/better roads	1%	1%	1%	2%
More activities/improvements	1%	1%	1%	1%
More seating areas in the forests	1%	1%	1%	1%
More shops to buy things	1%	1%	2%	1%
Some paths not as good as they should be	1%	1%	0%	1%
Better public transport services	1%	2%	1%	1%
Less midges	1%	1%	1%	1%
More information boards	1%	1%	1%	1%
More information, leaflets and brochures on campsites	1%	1%	1%	1%
Too commercialised	1%	1%	0%	1%
More marked walks	0%	1%	0%	0%
Fill potholes/improve roads	1%	1%	0%	1%
More snow, better facilities for skiers	5%	8%	5%	3%
Aviemore very run down	2%	2%	1%	2%
More fish & chip shops	1%	1%	1%	1%
Disappointed in Funicular/can't get out to walk around	1%	1%	0%	1%
Other	9%	10%	8%	9%

* Different coding frame used in 2003/04

3.15 Facilities, Customer Service and Rating of Visit

The number of people indicating that the selection of facilities in the Cairngorms National Park is poor is very low indeed and certainly lower than the figures recorded in 2003/04. The main issue with respondents is mobile phone reception/Wi-Fi with 12% seeing this as poor or very poor. Public transport comes out second worst with 11% (16% in 2003/04) of respondents stating that this is poor or very poor. This is followed by number of public toilets with 8% (13% in 2003/04) of respondents stating this is poor or very poor.

Generally ratings have improved across all facilities when combining 'very good' and 'good' though all 'very good' ratings have dropped for all facilities. Another key finding here is that those saying facilities are 'poor' or 'very poor' have also declined. Interestingly, respondents are less likely than in 2003/04 to say that they had not visited these facilities, showing that both usage and satisfaction have increased in most areas – the use of picnic areas is the only facility to have shown a slight decrease in usage since 2003/04 and this may in part be due to the more inclement weather over the winter months.

Table 44: How would you rate the following facilities in the Cairngorms National Park? (Figures in brackets refer to 2003/04 results)

	Very good	Good	Average	Poor	Very poor	Not visited/ applicable
Signposts	19% (27%)	67% (49%)	8% (9%)	3% (4%)	* (1%)	4% (11%)
Provision of car parks	15% (21%)	64% (58%)	14% (5%)	3% (2%)	* (0%)	4% (13%)
Condition of paths and tracks	15% (20%)	57% (52%)	13% (7%)	1% (2%)	* (0%)	13% (20%)
Number of public toilets	4% (9%)	49% (36%)	28% (19%)	7% (11%)	1% (2%)	11% (23%)
Cleanliness of public toilets	4% (13%)	49% (40%)	31% (16%)	3% (6%)	1% (1%)	12% (24%)
Picnic areas	8% (15%)	46% (42%)	10% (8%)	1% (2%)	- (0%)	35% (32%)
Public transport	1% (2%)	8% (5%)	6% (4%)	6% (7%)	5% (9%)	73% (74%)
Information boards	11% (18%)	59% (53%)	14% (8%)	1% (2%)	* (0%)	14% (19%)
Mobile phone reception / Wi-Fi access	2%	27%	31%	10%	2%	28%

Customer service is also generally good or very good. For example, only 7% (3% in 2003/04) of respondents stated that customer service was poor or very poor in pubs and restaurants while 26% said that this was average. For this survey questions on activities and retail outlets was also asked and here findings are again generally positive although it is important to note that over a quarter of respondents (27%) said that service was average with 10% saying service was poor or very poor.

Tourist Information Centres have seen a large increase in satisfaction since the 2003/04 survey with satisfaction (good and very good) increasing from 43% to 56% and the same can be said of accommodation where visitor satisfaction has risen from 47% in 2003/04 to 64% now. Overall, it is also clear that usage of all of the facilities has increased since 2003/04 as the number saying not visited/applicable has dropped significantly for all comparable categories, for example those saying they had not visited a pub or restaurant has dropped from 33% to 12% and similarly those saying they had not visited an attraction has dropped from 23% in 2003/04 to 9% now.

What is also clear from the table below is that around a third of respondents had not used a TIC or had stayed in accommodation during their stay (38% and 31% respectively said this).

Table 45: How you would rate the customer service provided by staff at the following facilities you may have used in the Cairngorms National Park? (Figures in brackets refer to 2003/04 results)

	Very good	Good	Average	Poor	Very poor	Not visited/ applicable
Pubs and restaurants	13% (18%)	42% (38%)	26% (8%)	6% (2%)	1% (1%)	12% (33%)
Visitor Attractions	34% (29%)	52% (42%)	4% (5%)	* (1%)	* (0%)	9% (23%)
Tourist Information Centre(s)	13% (13%)	43% (30%)	6% (7%)	1% (1%)	* (0%)	38% (49%)
Your accommodation	28% (30%)	36% (17%)	4% (4%)	1% (0%)	* (0%)	31% (49%)
Activities	29%	54%	5%	1%	*	12%
Retail outlets / shops	7%	37%	27%	9%	1%	19%

Respondents were asked to consider a variety of statements. Overall, the highest percentage of respondents were inclined to agree (90%) that there are plenty of things to do and see in this area “*at this time of year*”. This is followed by 87% of respondents that agree the National Park seems well managed and cared for (only 74% in 2003/04).

Eighty two percent (65% in 2003/04) of respondents agree that it will be good for this area if the Park attracts lots of visitors. With a further 85% (far higher than the 38% recorded in 2003/04) stating that information about this National Park is easy to find/access.

At the other end of the scale 65% (66% in 2003/04) of respondents disagreed with the statement “I would have enjoyed my visit much more if there hadn’t been so many other visitors”.

Once again the responses are very similar for both residents and day trippers or people on a break of one night or more as well as Scottish, other UK and overseas visitors. The key findings are that the first four statements have strong agreement and all four are improving over time and are far stronger than they were in 2003/04. The final indicator has broadly stayed the same as the results in 2003/04 which may be viewed as a positive also.

Table 46: I would like to read out a number of statements which other visitors have made about the Cairngorms National Park. Using one of the phrases on this card, please tell me how much you agree or disagree with each of these statements. (Figures in brackets refer to 2003/04 results)

	Agree strongly	Agree	Neither	Disagree	Disagree strongly	Don't know
Information about this National Park is easy to find/access	25% (7%)	59% (31%)	7% (11%)	* (14%)	- (4%)	8% (33%)
There are plenty of things to do and see in this area at this time of year	33% (26%)	57% (54%)	6% (5%)	1% (6%)	* (1%)	3% (9%)
I think it will be good for this area, if the Park attracts lots of visitors	18% (15%)	64% (50%)	9% (15%)	5% (11%)	1% (3%)	3% (7%)
The National Park seems well-managed and cared for	20% (15%)	68% (59%)	8% (9%)	1% (2%)	* (0%)	3% (14%)
I would have enjoyed my visit much more if there hadn't been so many other visitors	2% (3%)	7% (11%)	23% (11%)	55% (50%)	10% (16%)	4% (9%)

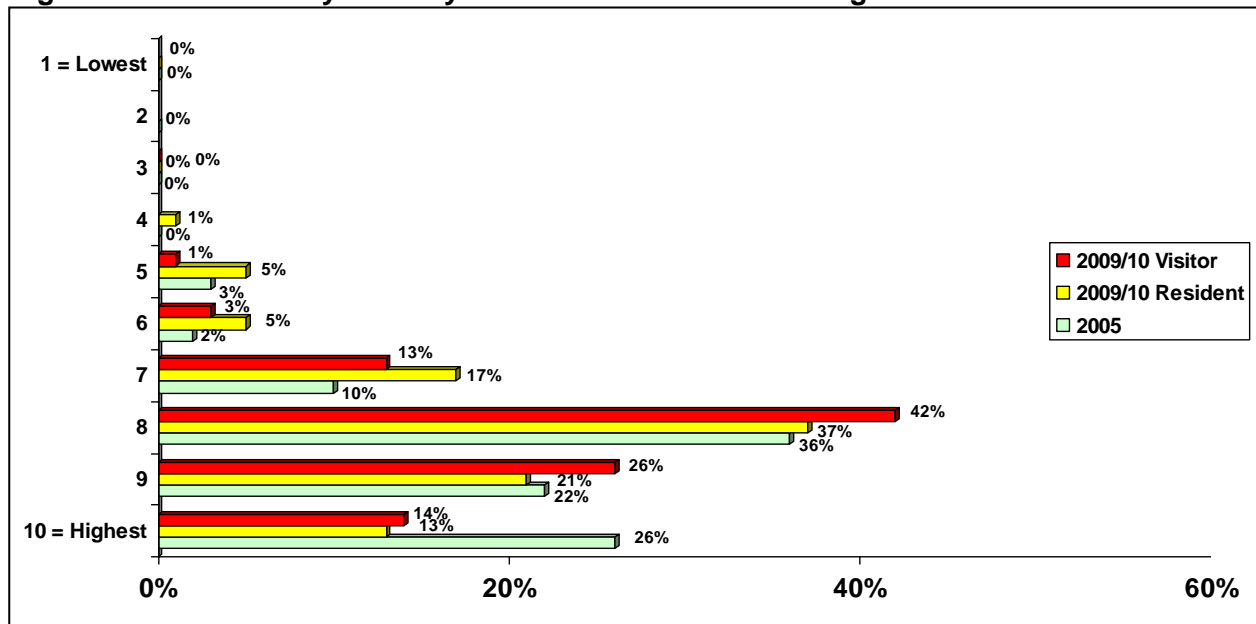
When asked to rate their overall visit to the Cairngorms National Park, with 1 being the lowest and 10 being the highest, almost 100% of respondents rated their visit to be a 5 or above with 8 being the single largest score provided (41% compared to 36% in 2003/04). Eighty percent (84% in 2003/04) of people rated their visit to be either an 8, 9 or 10 on the scale provided.

Mean scores for each respondent type have changed since 2003/04 with the largest drop being for residents, dropping from 8.88 to 7.98 and the largest increase being for day trippers rising from 8.23 to 8.41.

Table 47: Using a rating scale from 1 to 10, with 1 being the lowest and 10 the highest, how would you rate your overall visit to the Cairngorms National Park?

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
One	* (0%)	* (0%)	- (0%)	- (0%)	- (0%)
Two	* (0%)	* (0%)	- (0%)	- (0%)	- (0%)
Three	* (0%)	* (0%)	- (0%)	* (0%)	- (0%)
Four	* (0%)	1% (0%)	- (1%)	- (0%)	- (0%)
Five	2% (3%)	5% (3%)	1% (3%)	2% (4%)	* (3%)
Six	3% (2%)	5% (2%)	1% (3%)	2% (2%)	4% (2%)
Seven	14% (10%)	17% (6%)	11% (14%)	13% (11%)	15% (10%)
Eight	41% (36%)	37% (24%)	44% (42%)	38% (42%)	44% (36%)
Nine	25% (22%)	21% (19%)	29% (20%)	28% (20%)	24% (25%)
Ten	14% (26%)	13% (45%)	14% (18%)	16% (21%)	13% (24%)
Mean Score	8.25 (8.46)	7.98 (8.88)	8.41 (8.23)	8.37 (8.31)	8.27 (8.47)

Figure 14: How would you rate your overall visit to the Cairngorms National Park?



Base: Visitors: 1937 Q25 / Residents: 563 Q11

Source: CELLO **mruk** research

3.16 Visits to this and other National Parks

Of those that had been to the Cairngorms National Park previously, 42% (far higher than the 14% recorded in 2003/04) stated that it is their first visit in the past 5 years. With regard to the number of times people have visited the National Park in the last 5 years we do see some stark differences. At one end we have 37% (42% in 2003/04) of people visiting the National Park between 2 and 6 times in 5 years. At the other end we have 12% (33% in 2003/04) visiting the National Park 11 or more times in the last 5 years – this we feel is off-set by a higher number of respondents saying that this is their first visit in the past five years. A further 7% said they had visited more than 20 times.

Respondents from overseas are most likely to indicate that this is their first visit to the National Park in 5 years (90% said this, far higher than the 60% of respondents who said this in the 2003/04 survey), with a further 8% stating they have been 2-3 times in the past 5 years. Scottish visitors as may be expected are more inclined to have visited more frequently, with 12% (lower than the 28% recorded in 2003/04) stating they have visited the National Park more than 20 times. This rises still further among day trippers (16%, compared to a higher 37% recorded in 2003/04).

Table 48: Including this visit, how many times have you visited the Cairngorms National Park in the last five years? (Figures in brackets refer to 2003/04 results)

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1937 (1362)	413 (460)	599 (349)	925 (553)
First visit in five years	42% (14%)	12% (8%)	36% (16%)	60% (17%)
2 – 3 times	25% (23%)	30% (16%)	29% (21%)	20% (29%)
4 – 6 times	12% (19%)	16% (13%)	15% (21%)	9% (21%)
7 – 8 times	5% (3%)	7% (4%)	5% (2%)	3% (3%)
9 – 10 times	4% (5%)	8% (6%)	5% (5%)	2% (5%)
11 – 20 times	5% (9%)	11% (10%)	4% (10%)	2% (7%)
More than 20 times	7% (24%)	16% (37%)	6% (21%)	3% (14%)
Don't know/can't remember	* (4%)	* (5%)	1% (4%)	- (3%)

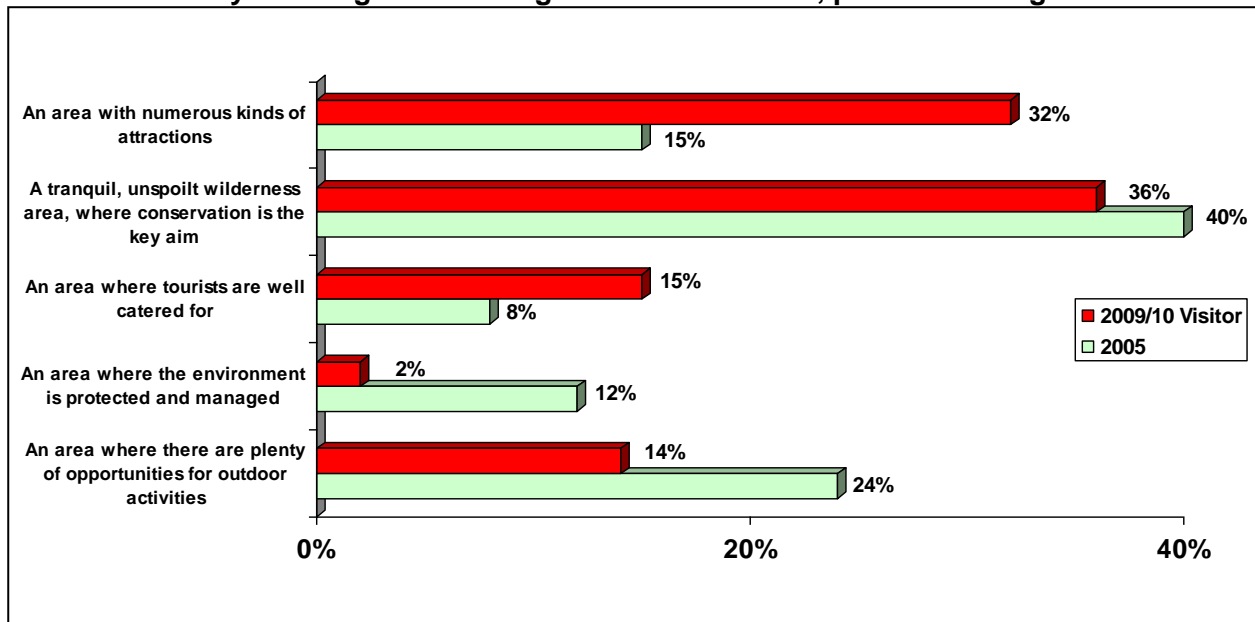
The main statement which the largest percentage of people indicated to represent their view of the Cairngorms National Park prior to visiting was “A tranquil, unspoilt wilderness area, where conservation is the key aim”, 36% stating this. Visitors on a longer break 5+ nights were most inclined to state this – 44% doing so.

A further 32% (only 15% in 2003/04) of respondents indicated that it was “An area with numerous kinds of attractions”. This figure rose to 34% (13% in 2003/04) among day trippers again emphasising the more active nature of these respondents – this is again emphasised by the 25% of day trippers who felt the most appropriate statements was ‘an area where there are plenty of opportunities for outdoor activities’..

Table 49: Which ONE of the following statements presented on this card best describes what you thought the Cairngorms National Park would be like, prior to visiting?

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	1937 (1362)	413 (460)	599 (349)	925 (553)
An area with numerous kinds of attractions	32% (15%)	34% (13%)	33% (17%)	31% (14%)
A tranquil, unspoilt wilderness area, where conservation is the key aim	36% (40%)	24% (32%)	34% (40%)	44% (45%)
An area where tourists are well catered for	15% (8%)	15% (8%)	14% (8%)	16% (9%)
An area where the environment is protected and managed	2% (12%)	3% (16%)	3% (11%)	2% (11%)
An area where there are plenty of opportunities for outdoor activities	14% (24%)	25% (31%)	16% (25%)	8% (21%)

Figure 15: Which ONE of the following statements presented on this card best describes what you thought the Cairngorms would be like, prior to visiting?



Base: Visitors: 1937 Q6
Source: CELLO **mruk** research

Nearly two thirds (63%) of all respondents indicated that they had visited other National Parks in the United Kingdom, lower than the 72% recorded in 2003/04.

Visitors on short breaks were most likely to have visited other National Parks in the United Kingdom, 77% stating this. Overall, it is those on a longer break that are least likely to have visited other National Parks only 54% stating they have done so, some 16 percentage points lower than the 2003/04 result.

Those respondents from the rest of the UK out with Scotland were most likely to say they had visited another National Park with 88% stating this.

Table 50: Have you visited any other National Parks in the United Kingdom?

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
Yes	63% (72%)	58% (59%)	72% (79%)	77% (83%)	54% (70%)
No	37% (28%)	42% (41%)	28% (21%)	23% (17%)	46% (30%)

3.17 Membership of Organisations and Groups

When asked if they were members of a variety of organisations or groups, the majority of respondents (79%) said that they were not. The largest number of people were members of the National Trust/National Trust for Scotland, 12% of all respondents stating this. The second most popular organisation that people stated they were members of was the RSPB with 7% stating this. Membership is on the decline across most areas with only the Scottish Wildlife Trust showing any increase.

Table 51: Are you a member of any of the following organisations or groups?

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
Base Number	2500 (2500)	563 (417)	413 (514)	599 (479)	925 (1090)
Royal Society for the Protection of Birds	7% (9%)	12% (14%)	6% (7%)	5% (8%)	7% (9%)
Scottish Wildlife Trust	2% (1%)	2% (1%)	4% (3%)	2% (2%)	* (1%)
John Muir Trust	1% (2%)	1% (4%)	1% (4%)	* (1%)	1% (1%)
British Trust for Ornithology	* (0%)	1% (0%)	* (0%)	* (0%)	1% (0%)
Historic Scotland	3% (3%)	3% (4%)	4% (4%)	3% (2%)	2% (2%)
National Trust / National Trust for Scotland	12% (16%)	11% (17%)	14% (16%)	13% (15%)	11% (16%)
Ramblers Association	1% (2%)	1% (1%)	1% (1%)	- (2%)	1% (1%)
Other	3%	3%	3%	4%	1%
None of these	79% (75%)	76% (73%)	76% (75%)	77% (77%)	82% (75%)

Appendix Face to Face Questionnaire – Visitors

Please double click on the icon below.



SB21527 Visitor Que
FINAL

Appendix Face to Face Questionnaire – Residents



SB21527 Residents
Que FINAL