





**A STRATEGY and ACTION PLAN  
for SUSTAINABLE TOURISM**

**March 2005**

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### Acknowledgements

Following a tendering exercise, the CNPA commissioned The Tourism Company to produce the draft Sustainable Tourism Strategy and Action Plan in close association with the ViSIT Forum.



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# 1 INTRODUCTION

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## 1.1 The need for a sustainable tourism strategy

The Cairngorms was formally designated in 2003 as Scotland's second National Park. It is an area of unique natural heritage in the UK.

Tourism presents a range of challenges and opportunities for the Park. The Cairngorms area is a well established destination for visitors, popular since Victorian times. Tourism is central to the area's economy, however, more can be done to strengthen the viability of tourism in the area and its ability to deliver year round benefits to the economy and society. In addition, many people agree that it is the quality of the landscape that underlies the reason for most visits, yet tourism has the potential to damage the very natural assets on which this industry depends.

A strategy is needed to provide an agreed framework within which the Cairngorms National Park Authority (CNPA) and its partners can work together for the successful development and management of tourism in the Park.

### *The meaning of sustainable tourism*

At its simplest, sustainable tourism can be said to be tourism that takes account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities. Making tourism more sustainable means taking these impacts and needs more fully into account in the planning, development and operation of tourism. It is a continual process.

### *The European Charter for Sustainable Tourism in Protected Areas*

The European Charter for Sustainable Tourism in Protected Areas aims to encourage good practice by identifying those Parks which are meeting agreed requirements for the sustainable development and management of tourism. The Charter is awarded by the EUROPARC Federation, an umbrella organisation of over 500 protected areas across 37 countries.

Any Park or protected area can apply for recognition that they are meeting the requirements of the Charter, and in 2004, 17 protected areas throughout Europe were recognised in this way.

The development of a sustainable tourism strategy and action plan forms part of the requirements of the Charter.

## 1.2 How the strategy was prepared

The strategy is largely based on the balance of opinion emerging from a process of local consultation. Key stages in this process include:

- An initial fact-finding visit.

- Meetings with relevant staff within the CNPA.
- A postal survey of tourism enterprises based within or around the National Park. The survey asked about enterprise priorities for tourism within the Park and what should be done about them. A total of 170 questionnaires were completed. Telephone interviews with a range of key stakeholders. These included tourism enterprises, conservation bodies, local authorities and development agencies.
- An assessment of key market trends including bespoke analysis of the 2003/4 Cairngorms Visitor Survey.
- The production of a Key Issues paper. This document set out the key issues that confront the industry within the Park and highlighted the areas which needed to be addressed in the strategy.
- Presentation of the key issues paper at a strategy workshop held in Ballater in November 2004, which was attended by 70 local enterprises and organisations.
- Discussion of the key issues paper and strategy direction at a specially convened session of the Tourism Development Working Group (TDWG).
- Production of a draft strategy and action plan.
- Circulation of draft to ViSIT Forum (formerly TDWG) members and some CNP Board Members involved in strategy development for comment.
- Discussion of comments at ViSIT Forum meeting.
- Production of final draft Strategy and Action Plan by sub-group of ViSIT Forum Members.
- Presentation to NPA Board in March 2005.

## 2 ASSESSMENT

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This assessment is based on data and documents obtained from the National Park Authority, surveys undertaken, local views and professional judgement. The chapter contains a factual analysis of the Cairngorm's tourism resources and markets and feedback from a range of different stakeholders.

The chapter concludes by summarising the assessment in a statement of strengths, weaknesses, opportunities and threats.

### 2.1 Economic and social issues

#### *Economic issues*

It is impossible to talk about economic issues in the Cairngorms without referring to the area's natural assets. The quality of the scenery and the natural environment lies at the heart of nearly all industry within the National Park. Not only is it inextricably linked to the sustaining of the tourism industry but it also forms the basis of and is sustained by economic activities such as forestry, farming and field sports.

Looking at individual sectors, the area's economy is heavily reliant on tourism, both in terms of employment and revenue generation. Tourism related businesses are estimated to account for 80% of the economy. As in many tourism destinations, employment in this sector tends to be seasonal with relatively low wages.

The industry is also susceptible to changes in visitor numbers such as that witnessed in US visitors following the terrorist attacks of 9/11. Another area of concern has been the decline in the ski industry, due to a number of poor snow seasons. This has affected employment in the areas around ski centres. In the case of Glenshee for instance, a recent report for Forward Scotland<sup>1</sup> identified that full-time job numbers are down from a high of 25 people to currently around 7. Seasonal job numbers are also significantly down.

Despite these setbacks, prevailing business conditions for tourism in the Cairngorms are relatively good. For instance, the survey of tourism enterprises showed that over half had seen business grow over the last three years. However there is no room for complacency. Four in ten enterprises stated that more business was essential for their viability.

Land Management, although not such a major force as tourism in terms of employment, plays a vital role in sustaining of the natural resource. Around 79% of land in the Park is used for agriculture of one sort or another<sup>2</sup> and its impact on the landscape is highly significant.

In general, farm incomes have been declining. Diversification of sources of income for farmers and land managers remains an important issue.

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<sup>1</sup> Appraising the sustainability of four Scottish communities, case study: Braemar, Draft final report, 2004., Forward Scotland

<sup>2</sup> Agriculture in the Cairngorms, memo from the National Farmers' Union of Scotland, June 2001.

## **Social issues**

Housing issues are particularly pressing within the National Park.

Compared to Scotland as a whole, the Cairngorms area has a lower number of residential dwellings and a much higher proportion of second homes and holiday homes. This, in part explains why the average house prices in the Park are higher than the national average. These conditions have led to a situation where affordable housing is a major issue for local residents. The lack of affordable housing is also creating difficulties in attracting workers to the area so effecting the labour market. Statistics for the Park area are currently being compiled.

In common with other rural areas in the Scotland and the UK, poor access to services is a significant issue for many local people. Schools, supermarkets, health and leisure services can be thin on the ground and where present are often a considerable distance away. This means access to services can be very patchy and it also makes the resident population reliant on private car travel. Those without cars are liable to suffer considerable social disadvantage.

Demographically, the National Park has less young people than is the average for Scotland. Part of the explanation for this can be found in the need for young people to move away from the area in order to find employment. Social deprivation within the Cairngorms area presents a complex picture. Based on national indices, the National Park is relatively affluent. However, consultations suggest that there are pockets of high deprivation that are not picked up in the national statistics.

## **2.2 Natural and cultural resources**

The Cairngorms National Park is Britain's largest national Park, covering 3,800 sq km. This makes it 40% larger than the Lake District and twice the size of Loch Lomond and the Trossachs.

The Park has a large mountain range at its heart and contains four of Scotland's five highest mountains. The Park also boasts 52 summits over 900 metres. The land within the Park above 600 metres - known as the 'montane zone' - is the largest area of arctic mountain landscape in the British Isles. The Park also includes moorlands, forests, rivers, lochs and glens.

The Cairngorms contains 25% of Britain's threatened species – two thirds of these are of Europe-wide importance. Thirty nine percent of the land area within the Park has a natural heritage designation.

The Cairngorms is one of the best places to see the Scottish crossbill, Red grouse. Golden eagle, Osprey, Dotterel, Capercaillie, and Crested tit. The National Park is also home to a wide variety of mammals - including Pine martens, Red squirrels, Badgers, Wildcats, Water vole, and Otters.

Heather moorlands managed for grouse and deer are examples of landscape influenced by field sport's tourism. However the overall impact of tourism on the

environment needs further investigation and there are some issues that need to be addressed.

There is pressure from large numbers of car-borne visitors in certain parts of the Park. There are examples where the design and location of existing townscapes and enterprises have had a negative impact on the landscape quality. The high number of walkers is also leading to erosion and has necessitated upgrading and repair of some footpaths in some areas, and there is also a real threat from accidental fires. The pressures caused in winter months by visitors accessing winter sports opportunities is also a major concern for some people within the Park. Other issues of local concern that relate to the natural environment include water supply and sewage treatment, hilltracks, windfarms, phone masts and the loss of views and vistas due to changes in land management ie the growth of scrub and forest along roads and railways.

The area has an interesting historic and cultural heritage. However, with the exception of the area's whisky making traditions and historic royal connections, these facets receive little prominence in current marketing. The relative absence is reflected in visitor desire for more information on this. 60% of respondents to the Cairngorms NP Visitor Survey 2004 strongly agreed with the statement that there should be more information on the area's cultural and historical heritage. This has been the subject of recent study, by Cairngorm, Rothiemurchus and Glenmore Group (CRAGG) who undertook an audit of culture and heritage and recommended thematic areas that could be developed for heritage tourism purposes. In addition, the Park Authority has signalled its intention to develop a Gaelic Language Plan and to promote Gaelic culture as part of its cultural heritage work.

## **2.3 Tourism facilities and services**

### ***Accommodation***

There is yet no comprehensive database on accommodation in the Cairngorms. However, it appears that:

- Accommodation provision is relatively equally split between the east and west of the Park, although in terms of single locations it is Aviemore that dominates.
- Accommodation appears to be equally split between serviced and non-serviced accommodation.
- A particular feature of the hotel sector is the presence of a number of hotels that are run by coach operators.
- There is a range of hostels, and outdoor centres providing accommodation within the Park, including privately run and SYHA hostels.
- A range of campsites and caravan parks, timeshare and second homes also provide alternative accommodation choices.

VisitScotland's quality assurance (QA) scheme provides some insights into the quality of accommodation on offer within the Park.



The data shows that some 320 providers within the Park are quality graded. The table below shows the numbers for each accommodation type.

*Table 1 No. of accommodation providers who are members of VisitScotland Quality Assurance schemes, by type*

Accommodation type	No	% of total QA
Self catering	171	53%
B&B/Guest house	87	27%
Hotels	42	14%
Hostels	9	3%
Camping and caravan	10	3%
TOTALS	319	100%

*Source: VisitScotland QA data, provided by CNPA, Sept 2004*

The table shows that quality graded accommodation is split fairly equally between non-serviced and serviced accommodation. Amongst the latter, greatest numbers of QA accommodation is available amongst B&B although this is very likely to be a product of the total B&B available rather than any indication of high QA take-up amongst this sector.

Looking in more detail at the quality grading data provides some additional insights.

*Table 2 Detail of QA scores by accommodation type*

Rating	Hotels	Guest houses / B&B	Camping & caravan parks	Self catering	Hostel
Min level			20%		
1 star	2%	2%	0%	3%	11%
2 stars	2%	6%	0%	15%	0%
3 stars	56%	54%	40%	46%	33%
4 starts	29%	34%	40%	29%	44%
5 stars	0%	2%	0%	4%	0%
Awaiting rating	11%	1%	0%	2%	11%

*Source: VisitScotland QA data, provided by CNPA, September 2004.*

The great majority of hotels fall into the 3 and 4 star categories. This same pattern is repeated for hostels and Guest houses/B&Bs. Average quality is lower amongst camping and caravan parks and amongst self-catering establishments.

However, despite this slightly varied picture of quality between accommodation types, in comparative terms the quality of accommodation within the Park is good. For instance, the average QA score in the National Park is 3.2 stars. This compares with 2.87 stars for the Highlands and the Scottish average score of 2.8 stars. The current QA score within the Park is also ahead of the national QA target of 3 stars that has been set by the Scottish Executive to be achieved by 2005. No comparable evidence is available from Loch Lomond & Trossachs National Park.

## **Visitor Attractions**

An audit carried out for the Cairngorms Marketing Strategy in 2004 identified 45 visitor attractions. Most of these are modest in size and not acting as a draw in their own right, although there are exceptions to this.

In terms of types of attraction, the area's history and heritage are key themes with a number of folk museums (e.g. Kingussie, Newtonmore), heritage centres (e.g. Braemar and Grantown on Spey) and castles (e.g. Balmoral, Braemar). The Park also boasts a good range of distilleries, with seven listed in the audit. Four of these are open to the public, three having a 4 star rating or above; and Glenlivet being promoted as part of the well-known regional Malt Whisky Trail.

In common with many National Parks, there are few family-orientated attractions. Landmark Forest Heritage Park, Speyside Railway and the Osprey Centre are the three main attractions in this market.

Most of the attractions within the National Park are only pulling in modest numbers each year. The exceptions to this is the funicular railway at Cairngorm Mountain, which attracted 180,000 non-skiing visitors in 2003 and the royalty-connected attractions at Balmoral and Crathie.

Quality amongst attractions is generally good. VisitScotland lists 31 attractions that are members of VisitScotland's Quality Assurance scheme for visitor attractions.

## **Recreational activities**

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

For several decades, skiing has attracted a winter tourist and day visitor market. Three out of the five snowsport areas in Scotland are within the National Park. Cairngorm mountain (with 28 runs) is located 15 km southeast of Aviemore, whilst Glenshee, the largest in terms of number and length of pistes, is located 13 km south of Braemar. The Lecht between Cockbridge and Tomintoul has enjoyed several good seasons over the past eight winters and has invested heavily in the quality visitor experience.

It is likely that snowsports and ski touring will continue to be an important part of the area's activity portfolio. However, a number of poor seasons in recent years and the potential effects of climate change have had a destabilising effect on operators in the area.

In summer, watersports are popular and there are a number of centres that offer sailing, canoeing and windsurfing (e.g. Loch Morlich Watersports Centre and Loch Insh Watersports Centre).

The area's outstanding wildlife and natural habitats has also led to a growing range of resources aimed at those participating in wildlife/ nature watching. These include:

- RSPB Osprey Centre (Boat of Garten)
- Guided walks run by the various ranger services that operate throughout the Park
- Packaged holidays run by operators based in and outside the Park

- Visitor attractions such as the Cairngorm Reindeer Centre and Rothiemurchus Fishery
- Resources to facilitate wildlife watching (e.g. Pine marten and Badger hides)
- General wildlife watching

Other activities that are significant include:

- Fishing. Salmon and trout fishing on the Rivers Spey and Dee has a worldwide reputation. Angling on the Spey was worth £11.8m in 2003.
- Mountain biking. There are good opportunities for mountain biking across the Park and the NPA has recently worked with the Forestry Commission Scotland and Laggan Forest Trust on the development of mountain bike routes at Achduchil Forest in Laggan
- Golf. Eight golf courses are listed as being within the Park
- Field sports. Shooting is estimated to be worth £4.6m to the tourist economy each year<sup>3</sup> and deer stalking also plays an important part in the economy and natural heritage management
- Horse-riding.

The Cairngorms Visitor Guide 2004 lists 41 providers of outdoor activities. Some offer residential facilities, whilst the majority offer multi-day courses.

### ***Walking / Countryside Access***

A number of visitor surveys conducted within the Cairngorms area show that walking is central to many people's reasons for visiting the Cairngorms.

The area is best known for its high level walking opportunities, but there is also a range of low level alternatives available. There has also been some product development which has offered a greater number of walking opportunities for the less experienced.

The Cairngorms central massif provides some of Scotland's most challenging high level walking. There are 49 Munros and half of Britain's eight mountains over 1,210 metres (Ben MacDui, Braeriach, Cairn Toul and Cairn Gorm). The mountain range has a strong reputation amongst experienced climbers with a wide range of classic ice climbs.

The Lairig Ghru provides a challenging 45 km route from Aviemore over the pass to Braemar. The Speyside Way is one of Scotland's four official long distance walks, and the route enters the Park south west of Advie, and currently runs to Aviemore with a spur to Tomintoul.

Away from the central Cairngorms, the National Park offers a wide range of lesser known but equally attractive gentler walking opportunities. The Wild Scotland website describes the attractions of these areas as follows:

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<sup>3</sup> Cairngorms Marketing Strategy, CNPA, 2004

*“Relatively few visitors explore the walks around Strath Avon and neighbouring Glenlivet - home to several distilleries - in the north of the area. At the Muir of Dinnet nature reserve, on Deeside, you may wander peacefully through the deciduous woodland surrounding Loch Kinord or squeeze into the Vat, an unusual rock feature. While in Angus, Glen Esk and Glen Isla have quiet paths and tracks through beautiful U-shaped valleys where you can drink in the silence.”*

Despite the Parks reputation for challenging walking, recent work by organisations such as the Upper Deeside Access Trust in the areas around Ballater and Braemar has opened up walking opportunities for families and the less experienced – with improved way-marking and the development of circular walks.

There are six walking festivals operating within the Park and the CNPA is encouraging collaborative marketing.

### **Events**

Events can provide a good way of bringing out local traditions and culture, involving local people and helping to extend the tourist season. The National Park is home to an enormous range of events both annual and irregular. Most of these are small scale. The main exception to this is the Braemar Gathering, which is the most famous Highland Games in Scotland and attracts a high number of visitors. The National Park also hosts a number of walking festivals that draw visitors from outside the area, as well as major orienteering events.

A particularly strong countryside events programme is publicised by the CNPA and delivered by the large network of ranger services that are present in the Park. Anecdotal feedback suggests that these events are popular with both visitors and residents.

### **Food and Work from Local Artists and Craftspeople**

The Cairngorms has a reasonable number of places to eat including restaurants, inns, cafes and tearooms. However, it has not established a reputation for local cuisine and the extent to which local produce is used is unclear.

A survey on Food Production and Processing in the Cairngorms National Park elicited a response from 130 farms, crofts and estates engaged in the production food – mainly beef, lamb and venison. Around 50-60% were interested in some future Cairngorms brand. Very few were currently selling direct to the public. The same survey identified 21 food and drink processors, mainly butchers and distilleries, but also including a brewery, fish farm, smoke house, sweet manufacturer and mineral water bottler. Most of these sell direct to the public and would be interested in a Cairngorms brand.

There is growing visitor demand for local produce. The Cairngorms NP Visitor Survey 2004 showed that 85% of visitors agreed or agreed strongly that they would like more local dishes based on the Park’s traditional food resources.

There are a small number of potteries and artists’ studios that sell craft items direct to visitors.

## 2.4 Accessibility and Transport

The Cairngorms is relatively accessible from Scotland's main centres of population. Inverness, Aberdeen, Perth and Dundee are all within one to two hours drive, and Edinburgh and Glasgow are in easy reach. The A9 is estimated to carry 4.5 million vehicles each year<sup>4</sup>.

Aberdeen and Inverness airports, with a growing number of domestic and international flights are both within one hour's drive of the Park.

Public transport to and from the Park is reasonable with Intercity trains serving Newtonmore, Kingussie and Aviemore. Long distance bus services also provide access to the area.

Movement within the Park via public transport is very difficult. This is reflected in the views of current visitors, 62% of which feel that public transport is either poor or very poor<sup>5</sup>. The more inaccessible parts of the Park include the north east and the south east – Sthraathdon, Glenlivet and the Angus glens.

In their report *Transport, Tourism and the Environment in Scotland*, Scottish Natural Heritage (SNH) emphasised the potential major negative impacts on the environment of the private car. Its impact is significant not least because it is the dominant mode of personal travel to and within all UK National Parks. The percentage of visitors using a private car is high (80%) but lower than the average for National Parks, with higher percentages arriving by private coach (10%) or public transport (6%).

## 2.5 Information and interpretation

There are nine Tourist Information Centres located within or just outside the Park. Aviemore, Ballater and Braemar are open all year, whilst Grantown-on-Spey, Kirriemuir, Kingussie, Newtonmore, Crathie and Tomintoul have seasonal opening hours.

Promotion of the Cairngorms National Park at most of these centres is low key with no special displays and low visibility racking of National Park print. The TICs tend to be welcoming and attractive in appearance. A weakness in terms of information delivery and benefit delivered to the area is the high proportion of floorspace devoted to the selling of merchandise, much of it sourced from outwith the National Park.

In addition to Tourist Information Centres, ranger services also fulfil a valuable service in providing visitors with information and interpretation. There are a number of visitor centres or visitor reception facilities within the Park with significant ranger service input. These are particularly important because they tend to be in more remote locations than TICs and as such are able to reach visitors engaged in outdoor activities. The sites are listed below:

- Rothiemurchus at its Visitor Centre, Fishery and Lochan Eilein.
- Forestry Commission Scotland at Glenmore Forest.

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<sup>4</sup> Roger Tyms and Partners, 2003

<sup>5</sup> see ref **Error! Bookmark not defined.** (figure relates to visitors who offered an opinion)

- HIE at Cairngorm.
- Explore Abernethy at Nethy Bridge.
- Glenlivet at Tomintoul.
- Glen Tanar at Braeloine.
- Balmoral at Glen Muick.

Most of these facilities provide a mixture of information and interpretation. They also act as a physical base for rangers and the regular events and walks which many participate in. Information about the work of the rangers and how to contact them is felt to be relatively poor at present.

Site-specific interpretation is provided at a number of individual locations. For example, interpretative boards have been placed around some working farms. These communicate land management practices and countryside access responsibilities to visitors. Future information and interpretation plans include the erection of Point of Entry markers to inform visitors that they are entering the National Park.

Currently, use of information by visitors is relatively limited. Seventy five percent of respondents to the Cairngorms Visitor Survey 2003-04 said they didn't pick up any information during their visit. In addition only 38% of respondents agreed with the statement that information about the National Park was easy to find / access.

The figures show that currently around 26% of visitors to the National Park visit a ranger base at some point during their visit, whilst only 18% visit a Tourist Information Centre.

## **2.6 Current marketing**

Most of the public sector led tourism marketing in the Cairngorms is undertaken by the three Area Tourist Boards (Highlands of Scotland Tourist Board (HOST), Aberdeen and Grampian Tourist Board, Angus and Dundee Tourist Board). Local authorities delegate delivery of tourism marketing to the ATBs.

All the ATBs have set targets for tourism growth, partly to be achieved through active marketing campaigns. Their marketing strategies recognise the need to increase the value of tourism in their areas and to reduce seasonality by promoting a year round experience. The ATBs tend to concentrate on the UK market, with international marketing remaining the responsibility of VisitScotland and VisitBritain. Primarily, they undertake general destination marketing. However, they also carry out some tactical marketing campaigns (for example for the shoulder seasons) and promotions to niche markets, often in conjunction with the private sector and VisitScotland.

Each of the three ATBs produces a holiday guide for their region. These are comprehensive publications, including a wide range of accommodation entries, supported by advertising. They also maintain visitor websites. In each case however, the Cairngorms area only forms a small part of the area that they cover.

The CNPA has produced a range of marketing and information material but has not taken the lead on active marketing campaigns. The main material includes:

- A general leaflet that gives an overview of the Park and its natural resources.

- Cairngorms Visitor Guide. Produced jointly by the ATBs and the Park Authority, the 60 page 2004 guide provides an overview to the natural heritage of the area as well as offering sections on history and culture, arts crafts and galleries, activities, attractions, eating establishments and places to visit. The guide is mainly funded through advertising, with any shortfall being supported by the CNPA.
- Cairngorms Countryside Events. An annual guide covering events organised by the various ranger services located within the Park.
- Cairngorms National Park website ([www.cairngorms.co.uk](http://www.cairngorms.co.uk)). This contains information about the Park and the work of the Authority. At present, visitor-orientated information is limited.

Many of the communities, estates and tourist associations also produce their own promotional material. A significant campaign for the western part of the Cairngorms is based on the BBC TV series Monarch of Glen. Other significant marketing groups include the Scottish Snowsports Marketing Group; Aviemore, Badenoch, Strathspey and Cairngorms (ABSC Group); and the Cairngorms Attractions Group (CAG).

## 2.7 Current visitors

The most up to date and comprehensive information on Park visitors is to be found in the Cairngorms NP Visitor Survey 2004. This presents the results of 2,500 face-to-face interviews with visitors and residents of the Park as well as 1,076 self-completion questionnaires conducted between May 2003 and April 2004<sup>6</sup>. Further detail on methodology for the Visitor Survey 2003/04 is provided in Annex 3.

### *Visitor Numbers*

The NPA has recently commissioned research to calculate visitor numbers using the STEAM model. The current estimates for visitor numbers are 1.43 million in 2003, which is slightly up on the estimated total for 2002, which is 1.39 million.

### *Visitor profile and composition*

- The Cairngorms attracts a relatively affluent type of visitor. Over two thirds (70%) of visitors in the survey were classified as social grade ABC1, 15% are C2 with 14% classified as DE. Overseas visitors were particularly likely to be from the highest socio-economic group.
- The Survey showed a predominance of adult visitors. Only 23% of respondents overall that stated they had any children in their party. Respondents with children were most likely to be residents. Within this adult market, couples prove to be important. Overall, 35% of visitors were with their partner only.
- Although there was a wide spread of ages overall, there was an emphasis on older visitors with 72% of respondents being aged over 35 years. This is especially true of respondents on longer stays with 43% being aged 55+ years compared to only 23% of day trippers.

<sup>6</sup> the results presented in this section relate to the results from the face to face interviews only.

### **Origin and length of stay**

The area attracts a mainly domestic market. Around 85% of respondents were from the UK with Scottish visitors accounting for 58%. Day trips are an important market for the Cairngorms accounting for 44% of all visitors. Local residents made up 17% of those surveyed. The table below provide more detail regarding the type and origin of visitors to the National Park.

*Table 3 Visitor Type and origin of visitors to the Cairngorms National Park*

	<b>Visitor Type</b>				
	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer Break 5+ nights
Base: All Respondents	2500	417	514	479	1090
Park Resident	17%	100%	-	-	-
Other Scottish	41%	-	100%	44%	27%
Other United Kingdom	28%	-	-	50%	42%
Overseas	15%	-	-	6%	31%

*Source: Cairngorms NP Visitor Survey 2003-2004 (face to face survey results)*

*Table 4 Trip characteristics of visitors*

	<b>Visitor Type</b>		
	Total	Short Break 1-4 nights	Longer Break 5+ nights
	1673	468	1072
I am spending all of my time in the Cairngorms area	50%	62%	39%
I will spend most of my time away from home in the Cairngorms area	15%	18%	14%
I will spend some of my time away from home in the Cairngorms area	17%	9%	22%
I am touring around Scotland and will only spend a short time in the Cairngorms area	8%	2%	11%
I am just passing through the Cairngorms area to/from my holiday destination	11%	9%	13%
I am staying in the Cairngorms area but will also use it as a base to visit other parts of Scotland	0%	0%	1%

*Source: Cairngorms NP Visitor Survey 2003-2004 (face to face survey results)*

The above tables suggest that:

- The area has a considerable amount of short break takers but those on longer holidays still make up the majority of holiday visits.
- Of those on long holidays, around a half are spending most of their time in the Cairngorms with the remainder touring or in transit. Increasing the time and money spent in the Cairngorms by the latter represents a considerable opportunity.



## **Expenditure**

Obtaining accurate assessments of visitor spend is problematic simply because people tend not to know exactly how much they have spent either on a daily basis or against selected items. However, 2003-2004 survey work indicates the following expenditure estimates on a comparison between the two Scottish Parks.

*Table 5 Comparison of Average spend per person per day(short break taken 1-4 nights) in Cairngorms National Park and Loch Lomond and Trossachs National Park*

	<b>Cairngorms NP</b>	<b>Loch Lomond &amp; The Trossachs NP</b>
Accommodation	£31	£24
Food and Drink	£21	£19
Shopping	£8	£10
Entertainment	£6	£3
Transport with the Area	£3	£4

*Sources Cairngorm NP Visitor Survey 2003-04 Loch Lomond and Trossachs Visitor Survey 2003-04*

People on longer holidays (5+ nights) to both Parks tend to spend slightly more per head, with day trippers spending less. Interestingly, residents out and about in the Cairngorms National Park also tended to spend slightly more than day trippers. This was particularly noticeable on food and drink.

## **Seasonality**

Although the Cairngorms NP Visitor Survey 2004 provides information on the months in which the interviews took place, it would be misleading to interpret these results as an indicator of seasonal patterns within the Cairngorms. Accommodation occupancy figures and monthly visitor number breakdowns at attractions would provide more robust analysis but at present it is difficult to obtain this information. This is due to the fact that such data tends to be presented according to ATB areas, rather than the National Park as a discrete area. Instead, the commentary from the Cairngorms Marketing Strategy provides some detail.

*“ Visitor numbers peak in the summer, Winter sports boost visitor numbers in the mountain areas around Cairngorms Massif. Leisure walkers tend to prefer the longer days of late spring, summer and into early autumn, with the Angus Glens popular as these times of year. Unsurprisingly, family visits follow a pattern reflected by the school holiday calendar. Mature couples, those taking weekend breaks and overseas visitors might be expected in relatively consistent numbers throughout the whole of the recognised tourist season.”*

Consultation undertaken amongst the tourism industry suggests that the Cairngorms area has the ability to be a year round destination although this is not without its challenges. The lengthening of the season to encourage visitors in the shoulder months is a key issue to be addressed.

### ***Reasons for visit***

Eleven percent of the visitors (26% of day trippers) come to the Cairngorms specifically for walking. Beyond this, visits are made for a wide variety of generally non-specific reasons such as past visits and general interest. Interestingly, 25% of visitors are members of organisations such as the Royal Society for the Protection of Birds, National Trust etc.

Further information on the perception and expectations of visitors is provided in the stakeholder perspectives section of this chapter.

### ***Activities undertaken***

The most popular activity amongst visitors is general sightseeing (56% of respondents). However, more specific activities are also quite important, with over 48% of visitors going walking during their stay and 20% engaging in active sports (e.g. climbing, cycling, skiing etc.)

Respondents aged between 16 and 24 years were considerably more likely to participate in active pursuits than older respondents i.e. those aged 65+ years. However, participation in low level walking was more even across all age groups.

The proportion of visitors indicating that they were visiting attractions during their visit is quite low (only 15% go to heritage sites, for example). Visits to cultural heritage and other sites such as museums or art galleries were more common amongst older visitors and those on longer holidays.

### ***Accommodation used***

Accommodation used by visitors is pretty evenly split between the serviced and non-serviced sectors. The importance of hotels in the area is quite apparent, with 37% of respondents using them compared with 14% using guesthouses or B&B. Twenty five percent of visitors used self-catering accommodation, with a further 12% camping or caravanning and 6% using hostels or bunkhouses. Eleven percent of visitors were staying with friends or relatives.

## **2.8 Tourism administration**

Tourism within the National Park is not the responsibility of one single organisation. A number of public sector organisations in the Cairngorms are involved in supporting the tourism industry, either through funding, training or marketing activity.

Despite this multitude of organisations, the Park Authority has a key role to play in the implementation of this strategy and in the co-ordination of tourism. It currently has two members of staff working specifically on tourism issues although a number of other posts have functions that relate strongly to tourism, notably in visitor services.

In line with Charter guidelines, the Park Authority has established a permanent forum, the Visitor Services, Information and Tourism Forum (ViSIT), through which it can communicate to a wide range of tourism stakeholders. At present, membership of ViSIT stands at around 40, and the meetings are held 5 times per year.

At a regional level there are currently three Area Tourist Boards whose areas include parts of the National Park. According to the current review of the implementation of Scottish tourism, these will be replaced by network offices of the national tourism body VisitScotland. There are suggestions that, within the new structure, one of the Network Offices could be 'assigned' as a primary point of contact for the Cairngorms, to co-ordinate VisitScotland activity in the Park area.

A further proposal within the review is that Area Tourism Partnerships will be set up at a local level for tourism planning and delivery purposes. It seems logical that the CNPA and the ViSIT Forum should be central to the delivery of such a partnership approach in the Cairngorms NP.

The review also envisages an enhanced role for the private sector in tourism planning and development at a local level. As part of this, local, not-for-profit groupings will be able to bid for funds under a new VisitScotland Challenge Fund.

Local tourism associations exist at a sub-Park level. Their level of membership and activity varies; some, such as the Monarch Country Marketing Group have developed their own tourism priorities and marketing programmes.

The Cairngorms Chamber of Commerce is operating across the whole Park area, based on an agreement with the other Chambers.

Support for tourism enterprises and new development is primarily provided through the network of Local Enterprise Companies. The Scottish Enterprise Network (SEN) delivers programmes for the Cairngorms through Scottish Enterprise Grampian (SEG) and Scottish Enterprise Tayside (SET). SEG leads on wildlife, nature-based tourism and food marketing initiatives for the whole of SEN. Moray, Badenoch and Strathspey Enterprise delivers programmes for Highlands and Islands Enterprise (HIE) which covers north west Scotland. The Cairngorms straddle the divide between the HIE and SEN areas, which causes an inconsistency in the level and nature of support within the Park.

Local councils are also important players in tourism, especially with respect to infrastructure and transport. In the Cairngorms NP the local councils have retained planning powers, which underlines their critical importance in the development of sustainable tourism in the Park.

With such a range of bodies, there is a danger of duplication of roles and a real need to ensure that tourism work is developed in a co-ordinated and integrated fashion.

The establishment of good communication channels is an important way in which effective working can be developed amongst differing partners. Consultation amongst public bodies revealed that the establishment by the CNPA of the Forum was seen as a good start. There was also positive feedback for the industry-led approach adopted by the Forum. However there was perceived to be a need for additional, more flexible ways of consulting.

## **2.9 Market trends**

The market for tourism in Scotland is likely to undergo some important changes. These, in turn, will have implications for the Cairngorms NP. The following

information summarises some of the major social trends that have been identified<sup>7</sup> and which are likely to impact to a greater or lesser degree on tourism in the Cairngorms.

- **An ageing population** - Older tourists are likely to be more widely travelled and to have greater expectations of a destination, not least because they have been exposed to so much of the competition.
- **Cash-rich and time poor travellers** – It is thought that some potential visitors are likely to be among those with more work and less leisure time on their hands - people who will want to spend this precious stress-busting time doing as near as possible exactly what they want in the most congenial surroundings possible. Quality again is to the fore in satisfying these visitors, with attendant flexibility in length of break, time of year and speed of booking.
- **Smaller households** – The average size of household has fallen steadily over the last thirty years, a trend which is forecast to continue. It is not simply that couples today are having fewer children – there are twice as many single-person households now than in 1961. Fewer or no dependants may mean more disposable income, greater flexibility in the choice and timing of holidays – less need to be confined to the school holiday periods for instance.
- **Interest in activities and the environment** – There is evidence of growing interest in Scotland’s main markets for something out-of-the-ordinary, a complete break from everyday life, with health and fitness and immersion in “nature” being sought-after experiences. There is an increase in understanding about environmental impacts. Tourism enterprises can respond to these trends by offering high quality fitness/leisure facilities and access to open-air activities. They can also adopt more sustainable working methods by adopting both internal and sourcing policies that will lead to a reduction in the wastage and pollution they create - and making sure that their marketing materials promote this.
- **A more discerning customer** - People today are generally better-informed and increasingly likely to use the Internet to access information about potential holiday destinations. They are likely to be more sophisticated and more discriminating, and will be seeking high quality experiences in the global marketplace. Upfront clarity in pricing will have to become standard, so that potential customers know exactly what each rate will cover.
- **The falling cost of travel** - The cost of travel is coming down in real terms. This has in no small part been fuelled by the growth of low cost flights. This presents destinations with both opportunities and threats, increasing the ability of visitors to reach destinations but also making it easier for people to travel further afield. This growth has led to a greater awareness of the environmental impacts of increased air travel.

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<sup>7</sup> Future Trends in Lifestyle and Leisure, Economic Research Associates, for Scottish Enterprise, March 2004; VisitScotland– Future Trends report, accessed from scotexchange website ([www.scotexchange.net](http://www.scotexchange.net)), Sept 2004

- **Increase in Business Travel** - This element is an important activity for Scotland and is well established in Aviemore, Badenoch and Strathspey. Further, the Park area has a significant number of businesses providing corporate activity and training services.

## 2.10 Stakeholder perspectives

Any tourism strategy, if it is to be embraced and successfully implemented, should not only take account of the resources and facilities within an area but also the views of priorities of key stakeholders. Thorough consultation about the strategy is a requirement of the European Charter. The following section summarises information from a range of sources including existing and specially commissioned research, consultation meetings and telephone interviews.

### *What are visitors looking for?*

One way of assessing what visitors want is by looking at the preferences and needs of current visitors. The most up to date information on the market for tourism in the Cairngorms area comes from the Cairngorms NP Visitor Survey 2004. It sheds light on visitor's perceptions of the area. Asked which one of four statements best describes what they thought the Cairngorms area would be like, prior to visiting, the results were:

- 40% expected a tranquil, unspoilt wilderness area, where conservation is the key aim
- 24% expected an area with plenty of opportunities for outdoor activities
- 15% expected an area with numerous kinds of attractions
- 12% expected an area where the environment is protected and managed
- 8% expected an area where tourists are well catered for

This pattern of the natural environment taking centre stage is backed up elsewhere in the survey. When asked what visitors like best, the highest listed answers were as listed in table 6.

*Table 6 What do visitors like most about the Cairngorms area*

<b>Feature</b>	<b>%</b>
Beautiful views and scenery/spectacular	46%
The hills/wide spaces, rugged, mountains	27%
Peacefulness, easy going pace of life	25%
The trees and colours of the landscape	13%
Nice walks, good hill walking	11%
Wildlife, plants, animals/deer/birds	11%
Fresh and clean area, unspoilt	11%
Friendly people	9%
Picturesque, very beautiful place	9%
Lots of things to do, different activities, active/relaxing	9%

Feature	%
Large open spaces without seeing anyone	7%
The water/lochs/waterfalls	6%
Rugged and wild	5%
Other	3%
Unspoilt – natural heritage/beauty	3%

Source: Cairngorms NP Visitor Survey, 2003/4, CNPA

It is apparent that the National Park's natural environment is absolutely central to its touristic appeal. Current visitors do not expect a wide range of attractions. Everything revolves around the landscape and the opportunities that this presents for sightseeing, outdoor activities, nature-watching etc. As such, current visitors are, in the main, being attracted by a range of tourism products that either directly or indirectly relate to the area's environmental qualities. It is important to note, however, that far more people are responding in a passive way to the landscape than are seeking to use it to pursue particular activities or interests.

One can see this same response in other National Parks. For instance, a similar conclusion was drawn in an SNH-commissioned report by T. Stevens, in 2002 that looked at success factors for the promotion of sustainable tourism across National Parks in UK and other parts of Europe. It found that actively marketing National Parks by focusing on environmental factors and sustainable tourism products makes market and strategic sense.

In addition to asking what aspects of the Cairngorms NP visitors find particularly attractive, the Visitor Survey also explored attitudes towards a number of potential initiatives that are commonly associated with a sustainable approach to tourism. The results are given in table 7.

Table 7 Visitor attitudes towards "sustainable tourism" initiatives

Statement	% strongly agree	% agree
There should be more places to see the area's cultural and historic heritage	60%	19%
I would be interested in more local crafts for sale	55%	19%
The area should be kept as natural as possible with limited development	37%	19%
I would be interested in using a shuttle bus to take me to different parts of the National Park	20%	67%
I would be interested in more local dishes based on the Park's traditional foodstuffs	18%	67%
I would be prepared to donate money to help local conservation causes	10%	51%

Source: Cairngorms National Park Visitor Survey 2003/4, CNPA. Base 625, sampled Dec 03 – June 04.

### **What are residents looking for?**

The Cairngorms NP has a resident population of 17,000, many of whom work within the tourism industry. The assessment stage of this study has not entailed any separate surveys to assess the opinion of local residents about tourism in the Cairngorms. Instead the strategy relies on existing studies and feedback from representative bodies and people working within local communities.

Table 8 is taken from a recent public consultation exercise undertaken regarding the Cairngorms Local Plan. Although not centred on tourism, the results do offers some wider insights that have relevance to the strategy.

**Table 8**      *What makes your community a special part of the CNP?*

<b>Statement</b>	<b>% respondents</b>
Natural environment	67%
Landscape	64%
Quality of life	55%
Wildlife	43%
People	33%
Outdoor activities	32%
History	21%
Community life	21%
Cultural heritage	16%
Tourist attractions	16%
Recreation facilities	11%
Buildings	7%
Social events	6%

*Source: Cairngorms Local Plan Residents Questionnaire, 2004, CNPA. Base 1408*

The table reveals the importance that residents place on the Cairngorm’s natural environment which relates to four of the top six attributes.

It is perhaps not surprising that, in addition to the importance residents place on natural environment, they also place value on (and seek protection of) a range of outdoor amenity resources. Table 9 below lists the results of a question that sought to identify areas that residents felt should be protected from development.

**Table 9**      *Are there areas which you feel should be safeguarded from development*

<b>Resource / amenity</b>	<b>% Yes</b>	<b>% No</b>	<b>No reply/ DK</b>
Parks/playing fields	80%	3%	17%
Community green spaces	76%	4%	20%
Wildlife habitats	75%	4%	21%
Paths	74%	4%	22%
Viewpoints / views	70%	4%	26%

*Source: Cairngorms Local Plan Residents Questionnaire, 2004, CNPA. Base 1408*

The clear view emerging from the results is that outdoor amenities and the area's natural environment are both valued greatly by residents.

Feedback gained through local consultation with local bodies revealed some general views on local reaction to tourism. These are listed below:

- There is no very clear consensus of opinion about tourism within local communities. Many local people are engaged directly or indirectly with tourism, either full time or part time, and its performance is important to them.
- There is some concern about the decline of traditional tourism services, such as traditional hotels, which are also providing a service within the community.
- Some local people are concerned to avoid an increase in volume of visitors in their communities and fear that National Park designation might bring this.
- There are problems with overcrowding and congestion at certain times and in certain places, with traffic congestion on certain roads and concentrations of coaches in some towns being mentioned.
- It is difficult to identify any areas where there are major and specific environmental problems arising from tourism, yet there is general concern that the nature and location of any new development must be very sensitive to the environment.

### ***What are enterprises looking for?***

The survey of tourism enterprises asked respondents to indicate a measure of relative importance for the future success of their business against a long list of possible activities. The full results are included in Annex 1. They can be summarised as follows:

- Enterprises see the conservation of the landscape and wildlife as key requirements for their business success, above almost all others. They included five conservation-orientated priorities amongst their top ten priorities.
- There is a concern about the overall quality of the visitor experience and about particular attributes such as visitor attractions and facilities for activities such as winter sports, cycling and walking. Improved quality tended to be seen as a greater need than more facility provision.
- There is a strong call both for more tourism as a whole and for more at certain times of the year, with the latter being seen as slightly more important.
- Enterprises give higher priority to specific promotional activity (relating to website development, branding, events and promotion of local produce and handicrafts) than to joint marketing campaigns and promotion of guided walks.
- There is a strong call for better information for visitors. This applies both to pre-visit and post-visit information.



- Enterprises place an almost equal emphasis on the area’s landscape and wildlife and on its cultural and heritage, in terms of the need for improved interpretation and promotion.

Evidence was also obtained from enterprises about their degree of economic need. Over half the enterprises said that business had grown in the last three years, but four in ten saw more business as essential to their viability. The months when enterprises are particularly looking for more business are March, October and November.

A particular problem and constraint that was identified is the ability to recruit and retain staff. This applied to over half the enterprises in the survey. They blame the situation on a number of factors. Insufficient labour supply is the most common reason, with others including insufficient housing for workers, the seasonal nature of the work and unpopular hours.

## 2.11 Summary Assessment - SWOT

The analysis of the area’s resources, visitor patterns and stakeholder responses enables a summary of strengths, weaknesses, opportunities and threats to be made. This also builds on analysis contained in the Cairngorms Marketing Strategy.

<b>Strengths</b>	
Fine mountain scenery with panoramic views	Relatively good road access
Britain’s largest high wilderness plateau	Mainline rail link within Park
Rich biodiversity – abundant wildlife	Reasonable links to airports
Lack of crowds	National Park designation
Trees and colour of the landscape	‘Cairngorms’ reasonably well known name
Seen as a place of tradition and history	High numbers of repeat visitors
Good opportunities for walking, birdwatching and mountain biking	Strong and positive word of mouth and recommendation
National reputation for snowsports	High satisfaction levels amongst current visitors
Some high quality outdoor activity centres, offering a wide range of pursuits	Park Authority seen as a ‘listening’ organisation
Reasonable attractions including some relating to Scottish icons – whisky, castles, Highland Games	Good network of ranger services
Royal Connections	Planning function of CNPA enabling integrated approach
TV connections (e.g. Monarch of the Glen)	Establishment of Tourism Development Working Group now called ViSIT Forum
Sporting culture	

<b>Weaknesses</b>	
Mountain scenery more of wilderness appeal, lacking the mountain/sea contrasts of the west	Uneven spread of visitors throughout Park
Variable quality of accommodation	Low pick up of information on the Park by visitors
Limited appeal and attractions for families	Visitors’ stated difficulty in finding information
Unreliable snow fall	Relatively low exposure of arts, crafts, history and heritage

<b>Weaknesses</b>	
Poor public transport within the area and high fuel prices	Short average length of stay
Poor public toilet provision	Central massif acts as a psychological and physical barrier to viewing Park as a whole.
Few major events	Few organisations with a pan-park remit
Poor quality of built environment in Aviemore	Many organisation with only partial coverage of National Park
No centres where visitors can clearly find out about the Park and its special qualities	Knowledge of the Park Authority's work amongst industry is low
Remoteness may put off some short break visitors	Lack of clearly defined tourism role for Park Authority
Challenging terrain may put off some cyclists and walkers	Problems with recruiting and housing staff
No park-wide National Park ranger service	Conservation perceived as equating with planning constraint.
	Private sector lacks capacity to become involved.

<b>Opportunities</b>	
Growth in short break and multiple holiday taking	International conflicts and terrorism increases domestic holiday-taking
Growth in activity and wildlife tourism	National Area Tourist Board Review
Increase in interest in natural environment	Increased budgets for VisitScotland
Growing interest in local/ authentic foods	Common Agricultural Policy reforms
Possible changes to the school year offering opportunities to reduce seasonality	Political emphasis on healthy pursuits to fight obesity
Increase in internet use	Work of the Association of National Park Authorities on National Park branding
Association with sporting personalities and the sporting ethos	

<b>Threats</b>	
Return of foot and mouth type episodes or other situations which prevent access to countryside	International conflicts and terrorism affecting overseas visitors
Climate change affecting winter sport season and bringing unpredictable conditions and market changes	Competition from other Scottish and international destinations
Increase in competitiveness and appeal of overseas holidays vis a vis the UK	National Area Tourist Board Review failing to accommodate a focus on the Cairngorms
	Shifting political priorities in tourism

### **3 STRATEGIC OBJECTIVES**

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This chapter sets the strategic direction for tourism in the Cairngorms. Based on the assessment in the last chapter, and consideration of the policy context, it identifies priority issues and approaches to sustainable tourism development. Target markets are presented. The strategy is articulated through a vision and a set of eight functional objectives around which action can be formulated.

#### **3.1 Policy context for sustainable tourism in the Cairngorms**

The sustainable tourism strategy should reflect the aims of the Cairngorms National Park, the evolving policies and strategies of the Park, the strategic context of tourism development in Scotland and the principles of the European Charter for Sustainable Tourism in Protected Areas.

##### ***The National Park aims***

The Scottish National Parks were established with four statutory aims:

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

These aims clearly show that a balanced approach between conservation and social and economic development must be at the heart of all the National Park's activities, including tourism. The role of the CNPA is to secure the long-term interests of the Cairngorms NP by, in the words of the legislation, ensuring the 'coordinated and collective achievement of the 4 aims of the Park. In working to achieve these aims, if it appears to the Authority that there is a conflict between the National Park aim set out in 1 above and other National Park aims, the Authority must give greater weight to the aim set out in 1 above.

Many people consider that the fourth aim provides particular justification for the Parks to become actively engaged in the development and promotion of sustainable tourism. However, it is important to appreciate that well managed tourism can significantly contribute to each of the other three aims and this wider set of benefits is specifically recognised and fostered by the European Charter.

The active role that the Scottish National Park Authorities may be expected to play in tourism is further underlined by the schedule of functions listed in the National Parks (Scotland) Act 2000, which include:

- 'to provide, or encourage other persons to provide, facilities in the National Park, and

- to encourage persons, by advertisement or otherwise, to visit the National Park, for purposes relating to leisure’.

This strategy should focus on the development and promotion of tourism that is in harmony with the protection of the natural and cultural environment.

### ***Evolving policies of the Park***

The principles of sustainability require that tourism should not be developed and managed in isolation but fully integrated with the wider sustainable development and management of an area’s resources. The European Charter requires that there is a close relationship between a Park’s management plan and its sustainable tourism strategy.

In the Cairngorms, two important plans that will create the policy context into which tourism needs to be integrated are the Park Plan, which sets the overall framework for the management of the Park, and the pan-park Local Plan which relates particularly to land use and provides the basis for development control. Both these plans are still to be completed. It is important that they should reflect this strategy and that, in turn, the implementation and review of the strategy should be guided by these plans.

The CNPA is also developing a set of more specific strategies and policies for a number of topics and functions that relate very closely to tourism. These include: natural heritage, branding; interpretation; outdoor access and recreation; and the ranger service. Again, there should be a close relationship with these strategies. Initial work on tourism marketing has been fully taken on board in this sustainable tourism strategy.

### ***Scottish tourism – the strategic context***

Tourism policy for Scotland is articulated in the New Strategy for Scottish Tourism, 2000 and Tourism Framework for Action 2002, which has been subject to updating and progress reports. Five strategic priorities include:

- Better marketing of Scotland in tourism markets at home and abroad;
- More effective use of IT to allow more bookings to be made online;
- The achievement of higher standards of quality and service;
- Better development of the skills of those who work in the industry; and
- The need to ensure that the support structures for the industry are right.

The emphasis on effective marketing and branding, on strengthening business performance and human resources, and on the quality of the product, provide important pointers for this strategy.

VisitScotland is to play the lead role in the marketing of Scotland, and the Scottish Executive has suggested that a 50% rise in tourism revenues by 2015 in Scotland is achievable. Central to the marketing and promotional activities will be campaigns to increase visitor interest in the specific areas (which are particularly relevant to the Cairngorms area) of wildlife, activities and culture.

The Area Tourist Boards all have Area Tourism Strategies. These reflect the above priorities. They place a strong emphasis on improving the quality of the visitor

experience and recognise that the natural environment is a primary component of that experience. They also refer to the importance of sustainability. The advent of the new Cairngorms National Park is specifically referred to as providing a new opportunity for tourism.

The Scottish Tourism and Environment Forum has established important priorities for the sustainability of Scottish tourism, which have been agreed by all the main agencies. Seven key aims have been identified, which should be incorporated into all strategic plans and policies. These are:

1. A more even spread of visitors throughout the year
2. More tourism businesses actively enhancing and protecting the environment, for example by joining the Green Tourism Business Scheme
3. Greater investment in tourism people and skills
4. A better integrated quality tourism product that meets visitors' demands and expectations and encourages them to stay longer and spend more
5. A clearer understanding of tourism's impacts
6. Greater involvement of communities in tourism planning, development and marketing
7. Greater use by visitors of Scotland's public transport system.

These aims provide an extremely important local policy context for sustainable tourism in the Cairngorms and are fully embraced in this strategy and addressed in the priorities for action.

### ***The European Charter for Sustainable Tourism in Protected Areas***

The European Charter for Sustainable Tourism in Protected Areas also explicitly refers to a balance between the needs of the environment, the visitor and the host community. It emphasises the need to conserve, bring out and promote the **special qualities** of each Park as a basis of its tourism offer. It identifies four key aims for sustainable tourism in protected areas that it requires a sustainable tourism strategy to address:

- To conserve, enhance and gain value from the environment and heritage
- To increase economic and social benefits from tourism
- To protect and improve the quality of life of local people
- To engage in effective visitor management and enhance the quality of tourism offered.

The Charter elaborates these four aims in a set of 12 principles, or underlying aims, which point the way to the kinds of structures and actions required. These are:

1. To increase awareness of, and support for, Europe's protected areas as a fundamental part of our heritage, that should be preserved for, and enjoyed by, current and future generations.
2. To improve the sustainable development and management of tourism in protected areas, which takes account of the needs of the environment, local residents, local businesses and visitors.
3. To involve all those implicated by tourism in and around the protected area in its development and management.
4. To prepare and implement a sustainable tourism strategy and action plan for the protected area.

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

### **3.2 Directions and approaches to sustainable tourism in the Cairngorms**

The policy context and the situation analysis in the Cairngorms, including resources, needs and current tourism performance, leads to the following conclusions about the approach to sustainable tourism in the Park, which are used to shape the strategy and priorities for action.

***The Cairngorms National Park Authority should play a clear role in tourism, coordinating and communicating with the various stakeholders and avoiding duplication***

The area contains a large number of individual tourism businesses. Many agencies are involved in tourism support. However, the CNPA is the only body which is solely concerned with the Cairngorms and has a remit across the area. It needs to provide leadership and coordination in tourism while also strengthening partnership working. It has taken positive steps through the creation of the ViSIT Forum. Communication can be strengthened in many ways.

The key role for the CNPA in tourism is in environmental management, access management, information, interpretation and support for specific initiatives. It can also engage in marketing and support for tourism enterprise, but in so doing it should play an enabling, strengthening and coordinating role rather than duplicating the functions of others.

***Conserving and enhancing environmental quality should be central to the tourism strategy, with tourism contributing to this where possible***

The strong consensus amongst all consultees about the importance of conserving the environment of the Cairngorms is striking. This is seen as fundamental to the long-term wellbeing of tourism as well as clearly of great importance in its own right. This has implications for planning policies and development control as well as for the level of resources devoted to conservation. Tourism development should seek to benefit conservation, for example through the use of old buildings and new buildings of excellent

design, and ways found for raising income for conservation projects from visitors and the industry.

***The overall profitability of tourism enterprises should be addressed***

Tourism is very important for the local economy yet many tourism businesses are not particularly profitable. The presence of the National Park should be used where possible to strengthen their performance. There is a need for ongoing and effective marketing and business support. This is also about creating the right enabling environment for business, addressing issues such as labour supply, which is a considerable constraint in the Cairngorms.

***The Cairngorms should be inclusive in the visitors it attracts and caters for, but with an emphasis on gaining and delivering value rather than volume***

Consultation revealed some debate about whether to concentrate on all tourists or be selective. There is an argument that the strategy should concentrate on high spending or niche markets. However, a general policy to seek increased value from tourism rather than increased volume should not lead to exclusiveness in terms of types of visitor sought. A wide range of market segments should be welcomed to the Cairngorms, including families and people on low budgets, as well as people with disabilities.

Currently, a large majority of visitors to the Cairngorms are general tourists and day visitors, coming to enjoy the area's landscapes in a relatively passive way, rather than special interest visitors. It is important to continue to cater for them, helping them to appreciate and understand the area more, get more out of it and put more back into the economy in return.

***A high quality of experience should be available to all visitors across the Park***

Quality is a watchword in all the policies for sustainable tourism identified earlier. Quality of facilities, private and public, in the Cairngorms is variable. The strategy should be to improve standards and make them more consistent across the Park.

Whilst it is reasonable to focus on businesses within the Park area first, there are many businesses that are based well outside the Park but are active within the area. In some sectors, these 'external' businesses dominate eg coach tour operators and it will be important to engage with in the pursuit of an improvement in standards throughout the area.

In general, the amount of accommodation, attractions and activities in the area appears reasonable. Emphasis should be placed on improving quality rather than new development, while encouraging innovative developments that strengthen and broaden visitor experience based on the special qualities of the Park. It is important to seek to maintain a range of types of accommodation (including hotels, self-catering, caravan and camp sites and hostels) and catering which offer good quality and value for money at all price levels.

***More should be done to increase appreciation and understanding of the area's special qualities and distinctiveness, and to deliver sustainable tourism experiences based on them***

This is very much in line with the principles of the Charter. It is relevant to general visitors as well as to special interest markets. Special qualities include the wild land, woodlands, managed estates, abundant wildlife and wide range of outdoor activities. These are complemented by cultural and historic heritage, which is relatively underexposed in the Cairngorms.

The strategy seeks improvement in the quality and distinctiveness of the experiences available, their accessibility to general visitors as well as those with special interests, and the level of interpretation.

***There should be a focus of effort on strengthening the year-round performance of tourism***

Seasonality of demand affects viability and quality of jobs, as well as leading to a concentration of pressure in terms of congestion and environmental impact. Although the Cairngorms does have a winter sports season, which is relatively unique in the UK, this is quite fragile, and there is a strong call for more business in the shoulder months, notably the spring and early summer. Marketing activity, the holding of events etc, should be focussed on encouraging visitors during those periods.

***The proportion of income from tourism that is retained in the area should be maximised and should be well spread throughout the Park***

Although the Cairngorms receives a reasonable number of longer staying visitors, many are on day trips, touring or in transit, and there is a belief that coach borne tourists often spend little time or money in the area. The strategy should focus on increasing length of stay and spend per head.

There is little evidence about the proportion of visitor spending that is retained in the area. Opportunities to improve this should be pursued, through strengthening the proportion of local spending and sourcing of supplies from the local area.

Consultation suggested that there is a general keenness to see a more even distribution of tourism income across the Park, paying particular attention to east-west spread, and seeking to bring more economic benefit to lesser visited and more geographically peripheral areas such as the Angus glens.

***There should be a clearer idea about the volume and type of tourism activity suited to different parts of the Park, linked to visitor management.***

Despite the potential economic benefits of spreading visitor income, consultees felt that more attention should be paid to determining the levels and types of tourism and recreation that should be seen in different locations. In particular there is a need to keep many wilderness areas free from pressure. This is strongly in line with the Charter, which is concerned about visitor flows and visitor management.



***Ways of accessing and exploring the park by means that minimise environmental impact should be encouraged***

Efforts to promote access to and within the Cairngorms by means other than the private car appear to have been limited to date. This is a matter of considerable importance to the Charter and is singled out in the Tourism and Environment Forum's aims.

***All visitors should be made fully aware of what to see and do in the Park – information delivery should be given a high priority***

As the Cairngorms is a new and large Park, split up into different parts, levels of visitor awareness of all that it has to offer are likely to be limited. Current use of information centres and published material is also limited. Many of the concerns and issues identified above can partly be addressed through ensuring effective information delivery.

***Tourism businesses should not only be helped to benefit from being in a National Park, but should recognise their responsibility towards environmental management and wider community benefit***

There is a need to strengthen the relationship between tourism businesses and the Park. They should buy into the approaches and objectives of this strategy. Pursuing sound environmental management is in their own self-interest as well as demonstrating a sense of responsibility towards the Park. This can be achieved through improved structures for participation, better communication and assisting and recognising good practice through training, support and accreditation.

***Local communities should engage in the planning and management of tourism in the Cairngorms and benefit from it where possible***

The level of involvement in tourism by communities across the Park is currently quite mixed. Consultation pointed to the need to ensure the engagement of local communities with this strategy, to help to strengthen local services through tourism and to encourage more involvement of communities in the provision of experiences and facilities for visitors and residents alike.

***Close attention should be paid to the monitoring of impacts of tourism over time so policies and actions can be adjusted accordingly***

Sustainable tourism is all about minimising the negative and strengthening the positive impacts of tourism on the economy, society and the environment. Monitoring these impacts against pre determined indicators should therefore be central to the strategy. This includes the need to start with some clear baseline indicators of the state of the environment, visitor levels and satisfaction, community involvement and reaction to tourism, and enterprise performance. Indicators and monitoring processes are covered in Chapter 5.

### **3.3 Target markets**

The tourism marketing strategy for the Cairngorms area has looked at available data on different markets and activities, and this is reflected in the following breakdown of target market segments. The selection of target markets should reflect the current visitor patterns and market trends, presented in sections 2.7 and 2.9, and strategic concerns about volume, value and inclusiveness expressed above.

When considering possible future markets, it is important to take note of the special emphasis that the Charter places on ensuring opportunities are available and promoted to people with disabilities or limited income.

#### ***Primary markets***

##### *Short and extended break takers – year round*

Short break taking continues to grow, with many people taking a number of breaks in a year. This includes weekend breaks and extended breaks up to one week. The latter offer particular potential for the Cairngorms. This segment should focus on people interested in outdoor activities and nature (but not as a special interest), with the flexibility to travel any time in the year. The potential market is mainly from Scotland and northern England, primarily pre-family couples and early retired. However, there is strong competition for this market.

##### *Long holiday takers – one to two weeks*

This is still an important market for the Cairngorms but nationally has seen decline and is not predicted to grow. It is primarily self-catering based and includes families with children. Again, within the segment, markets that engage in outdoor activities and enjoying nature are important.

##### *Long holidays – tourers or multi-centre holidaymakers*

A segment currently important for the Cairngorms. It includes domestic and overseas tourists and independent visitors and people on coaching holidays. Although little overall growth is forecast, the challenge and opportunity is to increase length of stay and spending in the Cairngorms area.

##### *Walkers*

People primarily motivated by walking, including fell walking, in their holidaymaking provide a sizeable market. This market should remain strong in coming years. Demand comes from a broad section of the population, however, such holidays appeal most to people travelling without children.

#### ***Niche markets***

##### *Activity based holiday takers*

This is the market segment motivated by activities as a primary purpose. It has grown significantly in recent years. During 2002, 2.2 million activity holiday trips were taken by UK residents in Scotland. A variety of outdoor activities are well catered for in the Cairngorms but the proportion of total visitors to the area who come for specific activities is currently low.

### *Wildlife enthusiasts*

Wildlife tourism covers visits to natural wildlife habitats or watching wildlife on land and/or sea. Bird watching is the primary activity of this market and is fast growing. Evidence suggests that wildlife watchers tend to be relatively affluent, well-educated, mature and environmentally focused.

### *Snowsports*

This is an important specialist market for the Cairngorms. Snowsport holidays generate 100,000 trips in Scotland per year. Variable weather has meant that the number of days it is possible to ski in Scotland has fluctuated dramatically over the last ten years. The strong lure of the European and North American ski destinations means this market is fiercely competitive. There may be an opportunity to position snowsports alongside other activities, rather than as a stand-alone product.

### *Cyclists*

People taking cycling holiday as a main purpose constitute a small but important and growing market, from the UK and overseas. The Cairngorms appears to be slightly more popular for cycling holidays than other parts of the Highlands, but the product is quite limited. More provision, including trails and information, could be made for this market.

### *Field Sports*

This is a relatively high value market, both in terms of individuals with a special interest and also the incentive component. Salmon and trout fishing and pheasant and grouse shooting and deer stalking can strengthen business in the shoulder months. Fishing and shooting each account for around 100,000 visitor trips in Scotland per annum. However, it is uncertain how much specific provision there is for tourists in the Cairngorms, especially on a casual and short term basis, and the proportion of visitors coming specifically for these activities is low although the specialised gun smiths and clay pigeon shoots add value by offering competitions and beginner tuition. The market has its own particular supply and demand issues, including specialist forms of demand such as incentive breaks.

## **3.4 Vision**

In 2010:

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

### **3.5 Strategic objectives**

In order to achieve the vision, nine strategic objectives are set out below. These are closely based on the conclusions of the assessment and the approach outlined in 3.2 above. They have been formulated as functional objectives, so that a range of action can be identified under each, which is presented in the next chapter.

In each case a cross-reference is given to the relevant principles of the European Charter as listed in 3.1 above.

#### **1 WORKING TOGETHER**

***To ensure effective involvement by all stakeholders in the planning, development and management of tourism in the Cairngorms, and to maintain good communication between them***

(Charter principles 3, 4)

#### **2 MARKETING**

***To raise awareness of the Cairngorms as a premier, year round rural tourism destination in the UK, recognising its outstanding natural heritage and its National Park status***

(Charter principles 7,11,12)

#### **3 INFORMATION AND INTERPRETATION**

***To ensure that visitors to the Cairngorms are aware of the range of places to visit and things to do throughout the Park, and appreciate and respect its special qualities***

(Charter principles 7, 9)

#### **4 QUALITY AND WELCOME**

***To improve and maintain the quality of experience in the Cairngorms for all visitors, communities and those working within the tourism industry***

(Charter principle 6)

#### **5 DISTINCTIVENESS AND DISCOVERY**

***To develop and maintain a wide range of opportunities for visitors to experience and enjoy the special qualities, distinctiveness and natural and cultural heritage of the Cairngorms***

(Charter principles 5, 8, 11)

#### **6 ENTERPRISE AND ECONOMY**

***To strengthen and maintain the viability of the tourism industry in the Cairngorms and the contribution that it makes to the local economy***

(Charter principles 9,11)

#### **7 ENVIRONMENTAL MANAGEMENT AND CONSERVATION**

***To maintain a high quality environment in the Cairngorms, encouraging sound environmental management practices and support for conservation by all those involved in tourism***

(Charter principles 5, 8)

## **8 VISITOR MANAGEMENT**

***To encourage an optimum flow and spread of visitors across the Cairngorms and minimise adverse social and environmental impact and congestion from visitors and traffic generated by tourism***

(Charter principle 12)

## **9 COMMUNITY INVOLVEMENT**

***To involve local communities in the planning and development of tourism in the Cairngorms and to ensure that it improves and does not diminish their quality of life***

(Charter principle 10)

## 4 PRIORITIES FOR ACTION

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This chapter takes the nine objectives in turn and identifies a range of action that should be pursued during the next five years (to 2010) in order to meet them.

### 1 WORKING TOGETHER

***To ensure effective involvement by all stakeholders in the planning, development and management of tourism in the Cairngorms, and to maintain good communication between them***

This is about maintaining the right structures for organisations and people with different interests to work together, creating a sense of partnership. A balance needs to be struck between the interests of the tourism industry, the environment and the local community. Leadership and coordination should be provided by the Cairngorms National Park Authority (CNPA).

► ***1a: Ensure effective linkages between the tourism and other areas of CNPA policy and action***

Tourism is an important issue for the Cairngorms which cuts across much of the work of the Park. It is very important that all those aspects of Park's work that have a bearing on tourism are taken into account in implementing the action plan, and that in turn they should reflect the sustainable tourism strategy. The Park Plan should provide the framework for coordination between tourism and other strategies and action plans for the Cairngorms.

► ***1b: Make the most of Scottish tourism reform***

The final details of the reform of Scottish tourism are still to be determined. The structure of the relationship between the Cairngorms and VisitScotland should be such that it brings maximum benefit to communities in the Park without bringing unrealistic administrative burdens. A strong presence for the Cairngorms should be guaranteed within the work of the new Network Office(s) responsible for covering the area, who should treat it as a leading product brand. Opportunities for funding the implementation of sustainable tourism in the Cairngorms through the new structure should be pursued.

► ***1c: Strengthen the ViSIT group***

The Visitor Services, Information and Tourism Forum has a vital role to play in creating the balanced and participatory approach to tourism management sought by this Strategy. It provides the permanent forum of interests that is a key requirement of the European Charter. Action should seek to:

- Motivate a high level of attendance.
- Maintain a good balance between tourism, local community and conservation, environmental and heritage interests (which is expected by the Charter).

- Ensure a good balance between private and public sector representation.
- Establish processes for ensuring effective representation of interests and feedback to those interests.
- Develop a wider public profile.

► **1d: Strengthen links with local tourism associations and other networks**

There is little interest within the tourism sector in establishing a separate tourism association for the Cairngorms. Instead, the structure for joint working between individual enterprises should be based on smaller area associations or thematic networks. These should develop a strong relationship with the Park and their work should be supported and facilitated as appropriate.

► **1e: Establish an annual open meeting**

There is a need for individual tourism enterprises to relate to the Cairngorms, understand the opportunities and responsibilities associated with the National Park, and become more aware of the tourism work of the CNPA and help to shape it. This should be fostered through an annual meeting (or standing conference) about tourism in the Park. This should also be open to local communities.

► **1f: Develop tools for regular two way communication with all stakeholders**

Processes for regular communication between the CNPA and individual tourism enterprises and other stakeholders should be established. Action should involve:

- Developing an appropriate facility within the Cairngorms website.
- Maintaining a feature on tourism in the Park's newsletter.
- Establishing features on the Cairngorms in communications media established by the new VisitScotland networks.
- Maintaining a clear reference guide on Park functions and who to contact.
- Making use of existing communication/dissemination methods (e.g. Tourism Knowledge Scotland, Think-net, Scotexchange)
- Encouraging communication between stakeholders and with the CNPA including information and sensitivity to relevant and new initiatives.

## **2 MARKETING**

***To raise awareness of the Cairngorms as a premier, year round rural tourism destination in the UK, recognising its outstanding natural heritage and its National Park status***

This is about encouraging more visits to the Cairngorms, through creating an increasing awareness, nationally and internationally, of its superlative environment and special qualities, underlined by its National Park status. Many businesses are seeking more income throughout the year, but there is a particular need to boost visitation in the shoulder seasons. Marketing should be sensitive to environmental and social impact, and be based on well constructed messages, aimed at target markets identified in the strategy. The CNPA is not a destination marketing organisation but should seek to influence and support the marketing of the new VisitScotland networks and the private sector.

The current Cairngorms Marketing Strategy should be reviewed in order to reflect the tourism strategy and action plan.

► **2a: Ensure effective use and communication of the Cairngorms brand**

The CNPA has taken a lead on the development of a Cairngorms brand. This should be completed. Priorities for action include communicating the brand and ensuring that it is effectively and correctly used for tourism purposes. Steps to be taken:

- Application of the brand in all Cairngorms National Park print and internet sites.
- Development and communication of clear policy and guidelines for use of the brand by private sector enterprises, all public sector organisations with a responsibility within the Park and other stakeholders.

► **2b: Ensure strong Cairngorms presence in destination marketing material, especially area guides**

Descriptive copy and images about the Cairngorms, which relate to its special qualities and is tailored to target markets, should be prepared for use in destination marketing vehicles. This should also convey messages relating to its conservation and which encourage responsible tourism. Imagery should attract out of season visitation. Areas guides should contain prominent, branded sections on the Cairngorms National Park, and accommodation in the Park should be clearly identifiable.

► **2c: Ensure strong presence on VisitScotland.com**

The main website for tourism in Scotland is likely to become increasingly important as a source of business. It is essential that the Cairngorms secures a high profile on this key information and booking tool.

► **2d: Develop the Cairngorms website to be a user-friendly portal for visitor enquiries**

A really effective website for the Cairngorms National Park should be a central component of the marketing strategy. The current site is not very visitor facing and various changes can be made to make it more user friendly and effective. The tourism content should be boosted and links to and from the site should be strengthened. Aspects of the website development should include:



- Creating a portal home page which directs different users to different versions of the website
- Enabling people to order copies of area guides
- Ensuring content integration with Cairngorms Visitor Guide
- Reflecting the Cairngorms brand throughout the site
- Including a searchable events database that includes the countryside events
- Provide strong links to other sources of tourist information (e.g. accommodation booking)
- Providing links to the proposed National Parks portal.

► **2e: Continue to produce dedicated Cairngorms visitor print**

A dedicated piece of print specifically on the Cairngorms is strategically important in raising the profile of the Park, what it is about, what it covers and what it offers. It can be used as a marketing tool, in answering enquires and in backing up the marketing work of others and in orientating visitors pre and post arrival. The current Cairngorms Visitor Guide is well thought of by the tourism industry and it should be continued. However, its distribution, use and effectiveness should be more closely monitored, together with other print, to guide future adaptation. There should be a review of print in the mid term of this strategy.

► **2f: Work with partners on strategic, thematic promotional campaigns**

Resources should be allocated and coordinated for support for one or two promotional campaigns each year, which may be instigated by the CNPA or its partners, including enterprise groups. These should be well focused and strategic, concentrating on certain themes and aspects of the Park, such as recreational activities, nature or specific events, and mainly outwith the high season. Engagement of p.r. and promotion through specialist media and operators should be considered. They may support, or be supported by, the creation of packages and incentives.

### **3 INFORMATION AND INTERPRETATION**

***To ensure that visitors to the Cairngorms are aware of the range of places to visit and things to do throughout the Park, and appreciate and respect its special qualities***

Information delivery and developing appreciation and understanding of an area through interpretation techniques are very important processes for the management of tourism. They can also deliver considerable benefits, through encouraging more exploration, longer stays, increased spending, modified behaviour, repeat visits and recommendations.

Acquisition of information by current visitors to the Cairngorms is low. For example, only around 18% visit a TIC. Action should address the challenge of influencing a

higher proportion of visitors after arrival. A significant proportion of tourism enterprises are calling for better availability of information for visitors.

► **3a: Take on board the interpretation strategy**

An interpretation strategy is currently being produced for the Cairngorms area. It is covering: links with the land; natural heritage; cultural diversity; recreational opportunities; and the produce of the area. Action on tourist information and interpretation, and on product development (see objective 5) should reflect this strategy.

► **3b: Identify and develop a range of venues and events that interpret the Cairngorm's special qualities to visitors**

Currently, there are no National Park visitor centres as such and the venues that interpret the area, its character, history and activities to visitors are quite limited. Consultation for this strategy revealed little enthusiasm for a new, single, dedicated Cairngorms NP visitor centre. Rather, interpretation should be effected through strengthening experiences and messages delivered through a range of attractions, venues, events and individual contacts, which can get messages across to visitors in all parts of the Park rather than requiring a journey to one place.

Many of the venues and events will be existing, others will need to be newly developed. Action should focus on improving interpretation, establishing linkages and filling gaps in the telling of the Cairngorms' story. Some forms of tourism product development, identified under Objective 5, relate to this. The tourism function is about providing an added attraction to retain visitor interest, generating appreciation and understanding, and helping to orientate visitors within the Park.

► **3c: Develop a proactive communication campaign to deliver messages to visitors post arrival**

The poor level of use of information currently points to the need for an active rather than simply a passive approach to information delivery. A promotional campaign aimed at visitors in the area should be developed. This would seek to influence current and future visits, including knowledge of places to visit, the Cairngorms events programme, understanding of the Park's qualities and sensitivities, adherence to the Scottish Outdoor Access Code (SOAC), stimulation of repeat visits, and promotion of alternative behaviour such as use of public transport. It can be effected through:

- Placing adverts containing relevant messages in local print material, such as in attractions' leaflets, or on car park tickets.
- Securing features in local media.
- A poster campaign.

► **3d: Strengthen provision and distribution of park-wide information material**

The Cairngorms Visitor Guide should be used as an orientation and information piece for visitors in the area. However, this could be supplemented by print that gives a greater capacity to put across information

on activities, events, themes etc. Various options should be researched, including a National Park newspaper of the kind that is found in many other Parks, commercially produced and widely distributed. There is a particular need and opportunity to strengthen information on the full range of events, and on activities that can be accessed at short notice (see under Objective 5).

► **3e: Ensure that tourist information centres project Cairngorms images and messages**

The future ownership and responsibility for TICs remains uncertain. Irrespective of this, there is a need to ensure that TICs in future are effective in communicating information on the Cairngorms to visitors. This could be achieved through:

- Branding in the TICs in the Cairngorms with the National Park brand.
- The provision of dedicated space, displays and racking on the Park within TICs.

► **3f: Extend information provision to other outlets**

A number of additional outlets for Cairngorms information should be identified, such as shops and garages, which would house displays and provide information services subject to a partnership agreement.

Accommodation providers are a critically important source of information and material should be made available for them to distribute, in addition to training for them on information delivery (see 3g).

► **3g: Strengthen Cairngorms knowledge and delivery by all tourism personnel**

A high priority should be given to building the knowledge and capacity of personnel to deliver information to visitors and interpret the Cairngorms to them. They should include TIC staff, accommodation hosts, receptionists, activity centre staff, volunteers, catering and transport providers etc. The process should involve:

- Training sessions.
- Familiarisation visits.
- Up dating through regular communication.

► **3h: Make more use of ranger services and bases for information and interpretation**

Rangers and their bases can play a very important role in delivering information to visitors. Action should involve:

- Agreeing basic level visitor-orientated aims for the Ranger Services as part of wider discussions about their role within the Park.
- Providing on-site promotional material to promote guided walks and events.

- Providing financial and technical support for on-going renewal of interpretation facilities within ranger bases.
- Providing financial support for training so that rangers can perform the full range of duties required to inspire visitors and locals alike

► **3i: Establish and maintain a tourism signage system**

A programme for the design and erection of gateway signs for the Park is currently in train. In addition, there should be a review of tourism directional signposting in the area, with a view to improve its quality and effectiveness consistent with National Park status. Coordination will be required with the local authorities.

## 4 QUALITY AND WELCOME

***To improve and maintain the quality of experience in the Cairngorms for all visitors, communities and those working within the tourism industry***

The provision of a quality experience for visitors is an important objective in its own right. Quality is also extremely important for the future economic success of the tourism industry in the area.

► **4a: Maintain and react to surveys of visitor satisfaction**

A key to quality delivery is understanding and responding to the needs of visitors. This requires a regular process of survey and feedback, including:

- Informal feedback from visitors, via TICs, accommodation hosts, with important points passed on to the CNPA and ViSIT Forum.
- A comprehensive visitor survey should be repeated every three to five years.

More information is provided in section 5.4

► **4b: Set quality targets that place the Cairngorms as one of Scotland's leading quality destinations**

A number of schemes for checking and grading quality of tourism facilities exist in Scotland – for accommodation, attractions and TICs. The European Charter requires that quality of facilities is regularly checked. Through these schemes, the Cairngorms should seek to underpin its position as a quality destination. Action should include:

- Setting targets for the participation in quality inspection schemes that are higher than the Scottish average.
- Seeking ways to increase participation in these schemes through linking membership to promotion, raising consumer awareness and easing the cost of joining these schemes where possible.

Participation in quality assurance schemes should be used as an indicator and regularly monitored.

► **4c: Improve quality for key visitor groups who experience barriers to social inclusion**

This is about accessibility to the countryside and to facilities, coupled with good information for disabled and disadvantaged people. Attention to their needs is a key requirement of the European Charter. Relevant action includes:

- Reviewing and auditing accessibility to countryside and facilities.
- Ensuring tourism enterprises are aware of, and responding to, their responsibilities under the Disability Discrimination Act.
- Improving information for visitors with disabilities.
- Ensuring that there are opportunities for economically disadvantaged visitors to enjoy the Cairngorms.

A number of these areas have been addressed by the Park. Actions should integrate with those falling under the 'park for all' aim and the Outdoor Access Strategy.

► **4d: Improve the quality of the public domain and services that affect visitors**

In general, there is reasonable satisfaction with the quality of visitor facilities in the Cairngorms, including some aspects of the public domain such as car parking and the trails. However, a particular weakness is toilets. Some enterprises have also pointed out problems with litter.

The CNPA is addressing car parking and trails under the Scottish Outdoor Access Strategy. However, wider action on improving public facilities, amenity and services may be achieved by initially bringing together those responsible, including formation of inter-departmental groupings within local authorities.

► **4e: Encourage and assist tourism enterprises to improve quality**

Improving quality requires action to be taken by private enterprises, including physical improvements and improvements in service and welcome. Extending the period and hours of opening is also important for quality and this should be encouraged. Actions to assist enterprises, in addition to information and marketing as covered above, include:

- Maintaining and encouraging participation in relevant training and communication schemes, such as VisitScotland's Pride and Passion initiative.
- Raising awareness of sources of funding for small improvement programmes, and investigating possibilities for more provision of such funding as appropriate.

► **4f: Recognise good practice in enterprise quality and management, relevant to the needs of the Park**

Enterprises that demonstrate particularly good quality, not only in terms of the elements that are judged for standard quality grading but also with respect to other aspects of importance to the Park, such as environmental management (see 7d) and the delivery of Park information, could be rewarded and promoted as a demonstration to others.

This might involve an annual prize/award scheme. In addition, consideration should be given to a separate recognition (in the form of a label) of enterprises meeting quality and management criteria related to the Park. This is being further developed at a European level as a second part of the European Charter, aimed at businesses, and the Cairngorms should consider the recommendations coming from EUROPARC on this matter.

## **5 DISTINCTIVENESS AND DISCOVERY**

### ***To develop and maintain a wide range of opportunities for visitors to experience and enjoy the special qualities, distinctiveness and natural and cultural heritage of the Cairngorms***

The European Charter stipulates that Parks should encourage the development and promotion of specific tourism products that enable discovery and understanding of the area, such as activities, events and packages based on the area's natural and cultural heritage. Basing tourism on the Park's special qualities and bringing out its distinctiveness is a sound strategy in terms of strengthening the area's appeal and in securing more local economic and environmental benefit. Such an approach can also enrich experiences for local people as well as tourists.

#### **► *5a: Make more of the guided walks and events programme as a tourist attraction***

The Park already has a good programme of guided walks and events but this could be strengthened and, in particular, promoted more effectively to tourists before and post arrival. A focus could be made on events out of season. Action to pursue:

- Evaluating current events leaflet through visitor research
- Including events on Cairngorms website
- Developing more events out of season
- Combining events into a composite Cairngorms Festival at a strategic point in the year.
- Encouraging more events to be put on by communities (see Objective 9).

#### **► *5b: Strengthen opportunities to experience the area's cultural heritage***

There is evidence that more cultural heritage attractions and experiences would be of interest to visitors and help to diversify the area's product and appeal. Knowledge and evaluation of the Cairngorm's cultural assets is being addressed in work for the State of the Park report. Based on this, further consideration then needs to be

given to ways of conserving, interpreting and gaining value from these assets.

Opportunities to align initiatives in the Cairngorms with wider national and regional priorities and initiatives should be pursued, such as raising the profile of traditional languages (Gaelic and Doric), and actively participating in the Year of Highland Culture 2007.

Making more of work from local artists and craftspeople, produce and food is part of this cultural heritage component – this is covered under Objective 6.

► **5c: Provide, maintain and promote a range of walking opportunities to suit different levels**

Walking is a premier activity in the Cairngorms, relevant to all markets but at different levels. There is a need to identify more clearly a portfolio of walking opportunities tailored to these various levels. A large market sector is looking for shorter, less challenging walks at a lower level, while opportunities for access to the plateau and the provision of the special Cairngorms wilderness experience is very important for some people. It is important to take tourism interests into account in developing and implementing the Scottish Outdoor Access Strategy and the Core Paths Plan.

Relevant action to pursue includes:

- Identification of a range of priority routes at different levels, and ensuring good levels of maintenance of them and appropriate identification on the ground.
- Improving branded Cairngorms information and creative promotion of walking opportunities.
- Considering defining some signature walks in the Cairngorms, for which it becomes well known.

► **5d: Make more of the range of available recreational activities and make them more accessible**

The provision of a wide range of outdoor sports and recreation is a particular strength of the Cairngorms. The opportunities could be made more accessible to the more general visitor (including those on short breaks), before and after arrival, as well as to those with a specialist interest who book a particular activity holiday or group experience in advance. Action areas include:

- Investigating potential market response and the opportunities to strengthen the way the product is provided for more general visitors, including improved, coordinated information on availability.
- Strengthening networking between activity operators.
- Encouraging tour operators to construct and promote multi-activity packages.

More research is needed into the market and product improvement needs and potential of particular activities in the area, notably:

- Snowsports, including the potential to link this to other activities and adapt to changing snow and market conditions.
- Field sports, such as salmon/brown trout fishing, deer stalking and pheasant and grouse shooting, which are good shoulder month activities.

► **5e: Make more of nature and wildlife watching**

This is also a strength of the Cairngorms. There are already specific initiatives aimed at developing nature and wildlife watching tourism businesses. For instance Scottish Enterprise have run a number of training courses aimed at improving product development and marketing of wildlife and nature-based businesses. However, more can be done to strengthen this sector including:

- Encouraging greater use of video links etc for wildlife watching.
- Making it easier for visitors to learn about and access wildlife opportunities, subject to due consideration of adverse impacts.
- Increasing provision and park-wide take-up of training aimed at nature-based operators.
- Improving networking between providers and packaging and encouraging membership of Wild Scotland.

► **5f: Develop products and experiences on the theme of learning about the land**

Land management skills and traditions are very important in shaping the Cairngorms. Encouragement and support should be given to landowners and managers to provide more interpretation of management practices, linked to access. This could include:

- Providing on-site interpretation about land management, included interpreted trails.
- Organising and promoting open days at farms, forestry operations etc
- Encouraging development of attractions centred around land management practices (e.g. model farms, farm parks etc).

► **5g: Provide financial assistance for innovative product development and events**

The development and promotion of products, activities and events identified above could be stimulated and assisted by small, well-targeted packets of financial assistance. This may require effective packaging and promotion of existing funding schemes or developing new ones. The Park might look at the feasibility of coordinating a small grants fund. Opportunities to develop networks and proposals for bids for the VisitScotland Challenge fund should be pursued. Holistic packages of support for nature-based and activity operators, linking training and funding, could be developed.



## 6 ENTERPRISE AND ECONOMY

### ***To strengthen and maintain the viability of the tourism industry in the Cairngorms and the contribution that it makes to the local economy***

Analysis undertaken for this strategy demonstrated the importance and yet relative fragility of the tourism economy in the area, with many enterprises seeking more business to underpin viability. Actions relating to the other objectives – marketing, information, quality and product diversification – will help. However, more attention should be paid to activities that will underpin the viability of enterprises, deliver support, and also increase the economic benefit generated in the local economy through strengthening supply-chain linkages.

#### ► ***6a: Keep abreast of industry performance and needs***

A common call is for public sector bodies, including the CNPA, to be more aware of the needs of the tourism industry. This can partly be achieved through representation on the ViSIT forum. However, it is also proposed that:

- a more systematic process for keeping a check on enterprise performance should be established, through an up to date ‘how’s business’ check, and
- a more comprehensive assessment of need, similar to the enterprise survey conducted for this strategy, be carried out every two to three years. This could be coordinated between those bodies who seek business information from enterprises as a single omnibus survey to avoid duplication.

#### ► ***6b: Encourage consistency, relevance and awareness of business support and training for tourism enterprises throughout the Cairngorms***

There are many sources of business support and training in the area. It is important that the CNPA does not in any way duplicate this. Its policy should to encourage consistency in what is available across the Cairngorms area and to ensure awareness of it. This might be assisted by:

- Bringing enterprise assistance and training agencies together to enhance coordination, as appropriate.
- Ensuring that knowledge and information on enterprise needs, such as skills audits, is shared.
- Identifying experts on sustainable tourism issues that can be called upon as required to assist enterprises.

#### ► ***6c: Maintain a fair, transparent approach to the control of tourism development through the planning process***

This is a sensitive area for businesses. Sustainable tourism requires robust and well applied planning and development control policies (see under Objective 7). However, it is very important that policies towards the expansion and development of tourism facilities as would be the case with all planning proposals are fair, clear and consistently applied across the Park, while also allowing flexibility to reflect the particular circumstances of

individual cases. In all cases the aims of the Park, national planning guidance and CNPA planning policy will apply when decisions are taken

► **6d: Encourage the development of tourism enterprises that can strengthen and support existing economic activity**

The European Charter points to the need to strengthen traditional economic activity through tourism, such as support for agriculture.

There may be potential for establishing or expanding farm based tourism in the area. This should be subject to an assessment of supply, demand, and landholder interests, which may lead to policies to encourage and support more diversification.

► **6e: Maximise spending on local crafts and produce and their use in tourism enterprises**

Promotion and sale of local produce such as food and drink, or other products such as handicrafts, either directly or through their use in tourism enterprises, can provide an important way of underlining the local distinctiveness of an area and strengthening the proportion of spending retained locally. There is strong demand from both tourism enterprises and visitors to the area for greater use of local food products. There are also high levels of visitor support for more local crafts being made available for sale. Action to pursue includes:

- An audit of existing craft and food producers' interaction with tourism markets.
- A web-based menu advisor linked to a list of suppliers.

► **6f: Strengthen the local labour supply**

Many businesses in the Cairngorms struggle to recruit and retain staff. Insufficient local labour supply is the most commonly cited reason for this, although there are several inter-relating issues which contribute to the problem. Policies and action to address this might include:

- Addressing outward migration of key parts of the local labour force (e.g. young people).
- More recruitment of economically inactive members of the local community (e.g. early retirees).
- Addressing seasonality of demand and seeking to establish more full time all year round employment opportunities.
- Raising the profile of tourism employment.
- Addressing housing and transport to work issues.
- Addressing economic migration.

## **7 ENVIRONMENTAL MANAGEMENT AND CONSERVATION**

### ***To maintain a high quality environment in the Cairngorms, encouraging sound environmental management practices and support for conservation by all those involved in tourism***

This is about maintaining a quality environment as a basis for tourism, minimising the negative impact of the industry on the environment, and seeking more support for conservation from the industry and visitors. The importance of the quality of the environment for tourism in the Cairngorms cannot be over emphasised.

#### **► *7a: Keep abreast of the condition of the environment***

The European Charter makes much of maintaining a check on environmental quality in parks, with respect both to the overall conditions for tourism and the environmental impact of tourism. Action required includes:

- Regular monitoring of water and air quality.
- Maintaining a systematic check on the effect of visitor pressure on key habitats in heavily visited places.
- Encouraging feedback from visitors and enterprises on environmental quality (see 4a, 6a and 5.4).
- Using relevant indicators and information from the State of the Park report, enabling change to be tracked against baseline information.

#### **► *7b: Support landowners and others to provide, enhance and maintain the quality of the natural environment as a key tourism resource***

Action and investment devoted to landscape and habitat conservation should be seen as investment in the capital of the tourism industry. Tourism implications, in terms of amenity provision and access, should be taken into account in land management agreements and contracts.

#### **► *7c: Ensure development control policies and processes maintain the quality of the landscape and natural heritage***

The Charter requires there to be strong development control in the interests of maintaining the environmental quality of the protected area both in its own right and for tourism. This needs to be demonstrated. Points about consistency and transparency, made above, are relevant here. The 4 constituent Local Authorities will also need to be involved in this, as they administer development control against their own local plans and policies until the Cairngorms NPA Local Plan is adopted.

#### **► *7d: Encourage and assist tourism enterprise to adopt sound environmental management practice***

If the Cairngorms is to be promoted as a sustainable tourism destination, all stakeholders must be encouraged and assisted to improve their environmental management. This is also a direct requirement of the Charter.

The majority of tourism enterprises in the area have taken some steps towards this, including energy and waste reduction measures. Interest in further action is high (75%). Action to pursue includes:

- Strengthening participation in the Green Tourism Business Scheme and other sustainable standards schemes.
- Encourage take up of training and advice available for businesses on environmental management, and supplement as necessary.
- More active promotion of enterprises that have taken verifiable steps towards better environmental management.
- Improving public sector facilitation, including the provision of recycling schemes that small businesses can use, which is a particular weakness in the area and perhaps whether social enterprises can provide services to provide recycling.

► ***7e: Seek ways to raise resources for management and conservation from tourism***

Many National Parks and other destinations are increasingly recognising the potential to raise revenue through tourism to support conservation. Opportunities to investigate and pursue in the Cairngorms include:

- Voluntary giving by visitors, such as donations or opt-out supplements to bills, which can be used as income for trust funds.
- Extending and coordinating the use of car parking charges that may contribute to fund.
- Encouraging support from tourism enterprises for local conservation projects.

## **8 VISITOR MANAGEMENT**

***To encourage an optimum flow and spread of visitors across the Cairngorms and minimise social and environmental impact and congestion from visitors and traffic generated by tourism***

This is about minimising the impact of visitors and their vehicles on the local environment and local communities, and minimising global environmental pollution from traffic movements. It is also about seeking to spread the benefits of tourism more equitably across the Park, and about the spread of visitation over time, which has been addressed under a number of other objectives.

► ***8a: Consider the needs of tourism in the context of a Park management and transport plan***

A clearer policy is needed on carrying capacity and visitor movements and volumes spatially across the Park. More understanding and agreement is needed on the role of honeypot sites and on the advantages and disadvantages of spreading impact. It is very important that some areas are kept relatively inaccessible in the interests of biodiversity and to maintain the wilderness experience which is so precious to some visitors and unique to the

Cairngorms. More needs to be known about the current and potential future impacts and consequences of visitor pressure on particular environments.

Policies and actions relating to traffic management and tourism transport need to be established in the context of wider, more holistic transport planning for the Park area. It has been found that public transport initiatives for tourism will only be successful if they are related also to local resident use.

► **8b: Monitor visitor and traffic volumes and movements, especially at peak times**

The Charter is looking for protected areas to keep a consistent record of visitor numbers across the Park and over time. This can be achieved through feedback from the main attractions, information from transport operators, traffic counters etc. Monitoring at highly visited sites is particularly important. Further information is given in section 5.4.

► **8c: Promote visitor use of existing public transport and improve it where possible**

Access to the Cairngorms using public transport is quite reasonable, and although services within the area are poor it is still possible to increase visitor use of what exists. Action to pursue includes:

- Promoting public transport options to potential and existing visitors, especially for consideration on return visits.
- Encouraging information services and individual enterprises in the main local centres to identify and promote circuits using public transport.
- Promoting public transport based excursion packages from main population centres such as Aberdeen and the central lowlands.
- Identifying gaps in provision and timetabling on routes that might be used by tourists, and investigating possibilities for improving the service, including strategic use of public subsidy.

► **8d: Encourage exploration by foot, cycling, riding and on water**

Greater attention should be paid to non-vehicle exploration of the Cairngorms. Action should include investigating, and where feasible encouraging, the extension or development of:

- Walking packages, single journey, from place to place or centre based.
- Cycling provision and packages. Although the layout and terrain of the Cairngorms makes this more difficult than in some other Parks, relevant service provision and information appears to be limited in the area. More exposure should be given to cycle hire. Extending opportunities for carrying cycles on trains and busses should be pursued.
- Riding and canoeing opportunities.

► **8e: Research the feasibility of dedicated transport to facilitate non-car exploration**

Feedback from the visitor survey showed a high percentage of visitors to the Cairngorms are interested in using a shuttle bus (87%). A number of other Parks do support a dedicated bus service for visitors, especially for walkers. Further research is needed into the feasibility of running a shuttle bus in the Park, possibly leading to a pilot service. Some possible locations have already been identified by SNH.

► **8f: Engage in active dialogue with coach operators**

Coach-borne visitors are important for parts of the local economy. They make up a significant part of the market at some attractions and are also key for some local services (i.e. cafes, souvenir shops). There are also a number of hotels within the Park that are owned by coach companies. However, coaches do bring certain problems, including congestion and damage on small roads and impacts in host communities. Policies and action should seek to establish greater benefits from this sector and to minimise impacts. There are opportunities for more high spending day visitors through corporate and other groups staying in Aberdeen and elsewhere. Action to pursue includes:

- On-going, one to one dialogue with coach operators including those not based in the Park area, looking at their needs and interests, routes used, toilet provision and parking practices, environmental management and purchasing policies etc.
- Production of a coach drivers area information handbook.

## **9 COMMUNITY INVOLVEMENT**

***To involve local communities in the planning and development of tourism in the Cairngorms and to ensure that it improves and does not diminish their quality of life***

This is a particular area of concern for the Charter, and the need to involve communities more in tourism was emphasised in the consultation undertaken for this strategy. Again, this is about securing benefits and minimising adverse impacts.

► **9a: Strengthen two-way communication with local communities on tourism issues**

Local people should be involved in the planning and management of tourism in their communities. There is little objective and systematically obtained information about local community reaction to, and involvement in, tourism. What is required is a two-way process of communication. As well as reducing possible conflict, this could also help some local people to consider whether they could benefit from becoming more directly involved in providing tourist services. This might be achieved through:

- Good community representation in structures suggested under Objective 1.
- Use of the Local Plan consultation.

- Holding additional local roadshows and meetings as appropriate.
- Making sure that any surveys of local residents (about quality of life, work of the Park etc.) include questions about reaction to tourism, and if necessary undertaking separate surveying on this.
- Possible utilisation of citizens panels in the same way.
- Regular features about tourism in the Park newsletter.
- Maintaining a close relationship with the local media on the subject.

► **9b: Encourage use of tourism related facilities by local residents**

Much of the action, provision and improvements emanating from this strategy should be directed towards benefiting local residents as well as visitors. Tourism enterprises should be encouraged to promote use of their facilities more actively locally. Interpretation activity about the special qualities of the Cairngorms should be equally aimed at and involve local people. Local use of outdoor recreation and educational facilities should be maximised.

► **9c: Maximise support for local services through visitor income**

The benefits from visitor income in underpinning local services, such as shops, garages and social services can be significant. At the same time, it is important to ensure that visitor use does not reduce local accessibility to such services. This can be assisted through careful use of information to visitors about the availability of services local to where they are staying, such as shops providing provisions for self-catering visitors.

► **9d: Encourage and assist local communities to provide facilities and events for tourists, leading to mutual benefit**

There are many good examples, where communities have provided facilities and experiences for visitors. These include local walks, events, exhibitions, catering, sales of produce, markets etc. This can provide visitors with an enjoyable and distinctive local experience and also bring income to support community facilities such as village halls and local societies. Such activity can benefit from advice, small amounts of funding, and exposure through information services and marketing (see under 3d and 5g).

## 5 IMPLEMENTATION AND MONITORING

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The previous chapter presented a range of priorities for action in implementing the strategy. These form the basis for a five year action plan, for the period 2005 - 2010. This chapter considers the implementation and review of the strategy and action plan and processes for monitoring the impact of tourism in the National Park over time.

### Role of CNPA

The CNPA will coordinate actions in the priority action table once they have been agreed. However, It is important to emphasise that this summary table of actions is a working document that will evolve and develop as the ViSIT Forum prioritises actions at a practical and realistic level. At this stage, only the potential delivery partners have been suggested because further investigation is required to determine which other partners will be involved.

Clearly the CNPA will not undertake all the actions, but will take the lead in identifying and initiating actions or activities which others will undertake and which fall within the strategy framework.

### 5.1 Implementing the action plan

The five year action plan is summarised in the table that follows. This indicates:

- The level of priority of the action (High, Medium)
- The year or years in which it might fall
- An indication of the level of financial resources that may be required for each step as follows:

Low	Under £10,000
Medium	£10,000 – £50,000
High	Over £50,000
- Key agencies to lead the action

Key to abbreviations used in the table

CNPA	Cairngorms National Park Authority	SEN	Scottish Enterprise network
VS	VisitScotland (this includes the former Area Tourist Board functions)	HIE	Highlands and Islands Enterprise
ViSIT	Visit Forum (CNPA)	RS	Ranger Services
TA	Local Tourist Associations	LH	Land holders (e.g. private estates, SNH, Crown Estate, National Trust for Scotland etc)
LA	Local authorities	LEC	Local Enterprise Companies (e.g. Moray, Badenoch and Strathspey Enterprise)
PS	Private sector	SNH	Scottish Natural Heritage
CC	Chambers of Commerce and Local Business Associations	SEPA	Scottish Environment Protection Agency



	<b>Action</b>	<b>Priority</b>	<b>Year</b>	<b>Financial Implication</b>	<b>Potential Delivery Partners</b>
	<b>Working together</b>				
1a	Ensure integration between the tourism strategy and Park Plan	High	1	Low	
1b	Establish effective presence for the Cairngorms within the work of the new VisitScotland network	High	1	Low	VS
1c	Monitor the attendance and membership profile of the ViSIT group and take steps to improve/strengthen where necessary	Med	1-5	Low	ViSIT
1c	Encourage effective reporting and communication with wider stakeholders by members of the ViSIT group	High	1-5	Low	ViSIT
1d	Strengthen links with local tourism associations and other networks	Med	1-5	Low	ViSIT
1e	Establish an annual open meeting	Med	1-5	Low	
1f	Develop tools for regular two-way communication with all stakeholders by:				
	Developing an appropriate facility on the Cairngorms website	High	1	Low	
	Maintaining regular tourism features in the CNPA newsletter	Med	1-5	Low	
	Establishing features on the Cairngorms in industry communications media established by the new VisitScotland networks	Med	1-5	Low	VS
	Maintaining a clear reference guide on Park functions and who to contact	Med	1	Low	
	Making use of existing communication / dissemination methods (e.g. Tourism Knowledge Scotland, Think-net, Scotexchange)	Med	1-5	Low	VS
	Encouraging communication between stakeholders and with the CNPA including information on relevant and new initiatives	Med	1	Low	ViSIT
	<b>Marketing</b>				
2a	Apply Cairngorms brand to all National Park print and internet sites	High	1	Low	
2a	Develop policy and guidelines on the use of the Cairngorms brand for tourism, and effectively disseminate this	High	1	Low	
2b	Make available copy and images on the Cairngorms for use by tourism stakeholders in their marketing	High	1	Low	
2b	Ensure strong Cairngorms presence in destination marketing material, especially area guides	High	1-2	Low	VS
2c	Ensure strong Cairngorms presence on VisitScotland.com	Med	2-5	Low	VS
2d	Develop the Cairngorms website to be a user-friendly portal for visitor enquiries, including links, events database etc.	High	1	Med	
2e	Continue to produce Cairngorms visitor guide	High	1-5	Med	
2e	Monitor use and effectiveness of visitor guide and other print – leading to a review	Med	1-2 3	Low	VS

	<b>Action</b>	<b>Priority</b>	<b>Year</b>	<b>Financial Implication</b>	<b>Potential Delivery Partners</b>
2f	Instigate, coordinate and implement occasional strategic marketing campaigns promoting specific themes	Med	2-5	Med	VS, TA, PS
	<b>Information and interpretation</b>				
3a	Take on board interpretive strategy	High	1-3	Med	
3a	Identify and develop a range of venues and events that interpret the Cairngorm's special qualities to visitors	High	1-3	High	SNH
3b					
3c	Develop a pro-active communication campaign to deliver messages to visitors post arrival	Med	1-5	Med	VS
3d	Strengthen provision and distribution of park-wide information material including a feasibility study of options including a commercially produced National Park newspaper	Med	2	Med	VS
3e	Ensure TICs project Cairngorms images and messages, through:				
	Branding in the TICs with the National Park brand	High	1-2	Med	VS
	Providing dedicated space, displays and racking	High	1-2	High	VS
3f	Develop partnership agreements with selected outlets for housing displays and providing information	Med	1-2	Med	
3f	Review and strengthen the process of accommodation establishments obtaining, displaying and distributing Park information	High	1	Low	TA,PS
3g	Strengthen and maintain Cairngorms knowledge and delivery by all tourism personnel by training, familiarisation visits and communication.	High	1-5	Med	TA ViSIT HIE/MB SE RS
3h	Review and strengthen use of ranger services and upgrade ranger bases for information and interpretation delivery.	High	1-3	Med	
3i	Establish and maintain a tourism signage system	High	1-3	High	LA,
	<b>Quality and Welcome</b>				
4a	Develop a process of receiving informal visitor feedback via TICs, accommodation hosts etc.	High	1	Low	ViSIT
4a	Undertake comprehensive visitor survey	High	3-5	High	
4b	Set targets for participation in quality certification and consider ways of encouraging levels of participation	High	1-5	Med	VS, TA HIE/MB SE
4c	Review accessibility to countryside facilities and establish a programme of improvements, including improved information	Med	1-3	Med	
4c	Ensure that tourism enterprises are meeting responsibilities under Disability Discrimination legislation	Med	1-3	Low	VS,TA CC
4d	Bring together those responsible for public amenities and services, to seek to establish improvement programme	Med	2	High	LA
4e	Maintain and promote training schemes in quality and welcome	High	1-5	Med	VS, TA HIE/MB SE

	<b>Action</b>	<b>Priority</b>	<b>Year</b>	<b>Financial Implication</b>	<b>Potential Delivery Partners</b>
4e	Raise awareness of funding assistance for small improvement schemes, and extend such assistance as necessary	Med	1-5	High	LEC CC
4f	Consider the creation of an Park-specific award scheme for good practice	Med	1	Low	ViSIT
4f	Keep abreast of proposals for recognising/labelling enterprises under Part 2 of the European Charter	Med	1-2	Med	
	<b>Distinctiveness and Discovery</b>				
5a	Make more of the guided walks and events programme as a tourist attraction by strengthening the programme, its seasonal spread, and related promotion and information	High	1-2	Med	RS
5a	Consider establishing a Cairngorms festival	Med	2	Med	ViSIT
5b	Explore tourism potential of cultural heritage themes that emerge from the 'State of the Park' audit.	High	2-3	High	ViSIT
5b	Engage in relevant national and regional initiatives relating to cultural heritage	Med	1-5	Med	ViSIT
5c	Provide a range of walking opportunities at all levels, well maintained and creatively promoted within the Cairngorms through the Core Paths Plan	High	3	Med	RS, LH
5d	Strengthen availability, accessibility and information on a range of activities for casual and short break visitors	High	1-2	Med	PS, TA HIE/MB SE
5d	Research market and product needs and opportunities concerning future of skiing and potential of making more of field sports.	Med	2-4	Med	PS, LH HIE/MB SE
5e	Seek ways to strengthen wildlife watching opportunities for all visitors, and work with operators on improved networking, training and packaging.	Med	2-3	Med	PS, LH SNH HIE/MB SE
5f	Encourage and support the development of product and experiences on the theme of learning about the land.	Med	1-3	Med	RS, LH
5g	Consider establishment of a small grants for innovative product improvement and development and events.	Med	1-3	High	LEC, SEN,HI E
5g	Develop networks and proposals for bids to VisitScotland's Challenge Fund	High	1	Low	CC, TA ViSIT
	<b>Enterprise and Economy</b>				
6a	Keep abreast of industry performance and needs through the ViSIT forum and through establishing a regular 'how's business' check	High	1	Low	ViSIT, CC, TA
6a	Conduct an omnibus tourism enterprise survey	High	2-3	Med	ViSIT, CC, TS
6b	Bring development support and training agencies together to discuss needs and coordinate delivery	Med	1-2	Low	ViSIT, CC LEC
6b	Establish pool of experts who can be called upon to deliver advice on sustainable tourism to enterprises	Med	2	Low	ViSIT

	<b>Action</b>	<b>Priority</b>	<b>Year</b>	<b>Financial Implication</b>	<b>Potential Delivery Partners</b>
6c	Maintain a fair, transparent approach to the control of tourism development through the planning process	High	1-5	Low	LA
6d	Investigate the potential for more diversification of farms/landholdings into tourism, and the support needed.	Med	2-3	Med	LH,SNH HIE/MB SE
6e	Strengthen awareness and spending on local crafts and produce, through researching producers, branding and strengthening information on sources for enterprises and visitors.	High	1-2	Med	VS, CC
6f	Work together to develop policy and actions that will help to improve the availability of local labour supply for tourism enterprises	High	1-3	High	HIE LEC,VS
	<b>Environmental Management and Conservation</b>				
7a	Develop a systematic process for keeping abreast of the state of the environment with respect to tourism, including selecting indicators, physical measures, monitoring habitats and feedback from stakeholders.	High	1	Med	SEPA
7b	Encourage land managers to maintain attractive natural environments and access to them as a key resource for tourism, and reflect this in land management contracts.	High	1-5	High	SNH LA
7c	Ensure development control policies and process maintain the quality of landscape and biodiversity	High	1-5	Low	LA
7d	Encourage and assist tourism enterprise to adopt sound environmental management practice by:				
	Strengthening participation in the Green Tourism Business Scheme, and other sustainable standards schemes	High	1-5	Low	VS, TA
	Encourage take up of available training and advice on environmental management, and supplement as necessary	Med	1-5	Med	VS, TA
	Actively promoting enterprises that have taken verifiable steps towards better environmental management	Med	1-5	Med	VS,
	Improving small businesses' access to recycling schemes	High	1-2	High	LA
7e	Seek ways to raise resources for management and conservation from tourism by:				
	Co-ordinating and extending use of car park charges that contribute funds to environmental conservation	High	1-2	Low	LA
	Investigating potential for voluntary giving scheme, and implement as appropriate	High	1-2	Med	ViSIT
	Encouraging tourism enterprise support for local conservation	High	1-2		ViSIT, TA,CC
	<b>Visitor Management</b>				
8a	Establish a spatial policy/plan relating to visitor volumes, carrying capacities and visitor spreading and flows across the Park.	High	1-2	Med	
8a	Establish policies and priorities for action for strengthening provision and use of public transport by visitors within a transport plan for the Cairngorms.	Med	1-2	Med	LA HIE/MB SE

	<b>Action</b>	<b>Priority</b>	<b>Year</b>	<b>Financial Implication</b>	<b>Potential Delivery Partners</b>
8b	Monitor visitor and traffic volumes and movements, especially at peak times	High	1-5	Med	LA
8c	Develop itineraries and promotional initiatives to encourage more visitor use of existing public transport	High	1-2	Low	LA PS
8c	Identify gaps in public transport timetabling and provision on relevant routes and seek to extend service to meet potential tourist demand, including subsidy if appropriate	Med	2-3	High	LA HIE/MB SE
8d	Assess and develop the potential for more opportunities for exploring the Park by foot, cycle, riding and canoe, including improved facility provision, packaging and information.	Med	3	Med	PS
8e	Conduct a feasibility study into providing a shuttle bus service	Med	2-3	Med	LA HIE/MB SE
8f	Instigate and maintain dialogue with coach operators, including possible production of coach drivers' handbook	Med	1-3	Low	VS
	<b>Community Involvement</b>				
9a	Ensure good level of community representation and involvement in structures identified under Objective 1	High	1-2	Low	ViSIT
9a	Obtain feedback on residents opinion of tourism, through adding questions to regular surveys or consultation work and if necessary undertaking occasional specific surveys.	Med	1-5	Low	
9a	Maintain coverage on tourism in Park newsletters and local media	Med	1-5	Low	
9b	Encourage providers of tourism facilities to promote use to local residents	High	1-5	Low	TA PS
9c	Encourage hosts to provide visitors with information on the availability of services local to where they are staying	Med	1-5	Low	TA PS CC
9d	Encourage and assist local communities to provide facilities and events to tourists	Med	1-5	Med	VS HIE/MB SE

## 5.2 Strategy and action plan implementation and review

The ViSIT Forum has been heavily involved in the development and finalisation of the strategy and action plan. As a result, it will continue to play a strong role in the on-going management and development of sustainable tourism throughout the Cairngorms.

It will be the responsibility of CNPA staff to further develop the Actions and identify partners and seek commitment to play an active role in their implementation. A summary of progress will be reported to the ViSIT Forum on a regular basis. This could take the form of short quarterly reports and a comprehensive annual review which will also be presented to the Board. Quantitative measures of output and response, such as distribution of information material and attendance at training sessions, should be included in reporting.

The strategy and action plan will form a key part of the application for the EUROPARC European Charter for Sustainable Tourism in Protected Areas. This will be the subject to a mid term review, in 2007. The results of this will be conveyed to EUROPARC. In 2009 a new strategy and action plan will be prepared, and will form the basis for renewal of the Charter.

### **5.3 Indicators**

A set of indicators will be used to monitor the performance and impact of tourism, which in turn relate to the main issues addressed in the strategy.

The indicator set will be developed so that it complements and integrates with the full set of indicators being established by the CNPA for checking progress against the four overarching aims of the National Park and the implementation of the Park Plan.

Suggested indicators include:

#### *Volume and spread of tourism*

- Estimates of trips, nights and spending in the region
- Visitor numbers at attractions and main sites (monthly to get indicator or seasonality)
- Monthly occupancy at accommodation (see under enterprise performance)
- Traffic counts at main locations (monthly)
- Number of tourism development projects receiving planning permission (together with number of applications, number called in by CNPA, and outcome)
- Proportion of attractions and activity providers open all year

#### *Visitor satisfaction*

- Percentage of visitors satisfied in general and with types of facility / service
- Proportion of repeat visitors
- Number of complaints received

#### *Tourism enterprise performance and satisfaction*

- Monthly accommodation occupancy rates and attraction visitor numbers
- Performance increase or decrease compared to previous year
- Number of jobs supported – full time, part time : all year, seasonal
- Proportion of enterprises with quality certification
- Number of enterprises using local produce
- Percentage of enterprises satisfied with CNPA

#### *Community reaction*

- Proportion of residents surveyed saying they are happy with tourism levels
- Number of complaints received relating to tourism

### *Environmental impact*

- Records of air and water quality
- Levels of litter in key sites
- Proportion of visitors arriving by public transport
- Number of enterprises in Green Tourism Business Scheme
- Number of enterprises taking environmental management measures such as recycling

## **5.4 Monitoring**

Monitoring will involve a combination of surveys, utilisation of external data sources, observation and less formal and structured feedback.

### ***Overall volume and value of tourism***

It is intended that regular estimates of the extent and economic impact of tourism will be obtained by using the STEAM methodology and applying this to the area of the Cairngorms.

### ***Visitor feedback surveys***

Qualitative feedback on visitor reaction to the Park should be encouraged. TIC staff, rangers and private sector operators should be encouraged to solicit opinion and pass on comments to the CNPA and other relevant agencies. This might be collated annually for discussion and dissemination through the ViSIT forum.

A comprehensive Visitor Survey has already been instigated by the Park Authority. This should be repeated every three to five years. It is recommended that the survey maintains consistent question wording and methodology in order that direct comparisons can be made. The following topic areas should be maintained in each survey:

- profile of visitors; origin and access
- satisfaction levels with facilities and services;
- feedback on perceived quality of the environment and any problems encountered;
- places visited in the Park (to keep a check on distribution); activities undertaken.

In order to gain information on visitor markets that have smaller numbers (e.g. overseas visitors, disabled visitors) it might be advantageous to consider over-sampling amongst these groups by a known factor (e.g. a factor of 10). This would allow specific analysis on these groups to be done but also allow the over-sampling to be corrected for analysis on the representative sample.

### ***Performance and opinion of tourism enterprises.***

This can be monitored in a number of ways:

- Qualitative feedback via the ViSIT Forum.
- Using VisitScotland records on visitor attraction admissions and their Business Confidence Monitor. The possibility of re-basing data from these surveys to give pan-Cairngorms performance measures should be pursued (currently they are based on ATB regions).
- Instigating a dedicated, simple quarterly “how’s business” survey of tourism enterprises.
- A questionnaire survey of all enterprises undertaken every two to three years. This should repeat many of the questions used in the enterprise survey conducted as part of the development of this strategy. To avoid enterprises receiving surveys from more than one organisation, one omnibus survey might be produced which satisfies the needs of all stakeholders who regularly contact tourism enterprises (LECs, Tourism Network Offices).

### ***Feedback from local communities***

It is important to pick up any changes in community reaction to tourism, for example where specific communities may be concerned about congestion etc. This could be achieved through:

- Qualitative feedback via representation on the ViSIT Forum.
- Recording complaints received.
- Including reaction to tourism in community liaison work and in any surveys about facilities, services and quality of life.

### ***Physical checks on visitor flows and impacts***

This should include monitoring of visitor movements and observation or other records relating to possible impacts:

- Traffic counts on the principal routes into the Park;
- Records from people counters located around the Park
- Recording attendance at visitor centres, events, etc., including monthly figures to check on seasonality
- Recording car park usage
- Feedback from transport operators on passenger levels
- Consideration of Park management records on endangered species, habitat loss etc. in areas of high visitation
- Annual audit of any known tourism developments, including planning permissions
- Utilisation of SEPA air and water pollution monitoring
- Regular observation and recording of litter levels at key sites.



## ANNEX 1

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### *Enterprise priorities for managing and promoting tourism in the Cairngorms*

The survey of tourism enterprises asked respondents to indicate a measure of relative importance for the future success of their business against a long list of possible activities. The results are shown below. Ratings were done using a 1 to 5 score, with 5 =very important and 1 = not important.

Please note: Priorities are ranked by the overall average score for each priority. They are not ranked according to the percentage of enterprises that said that a particular priority was very important (figures for which appear in the right hand column.)

Rank	Priorities	% stating v. imp (i.e. a score of 5)
1	Active encouragement and promotion of good customer service	71%
2	Conserving the area's landscape and wildlife	71%
3	Encouraging visitors to conserve the area's landscape and wildlife	71%
4	Attracting more tourism at certain times of year	65%
5	Improving visitors' understanding of the effect of their behaviour on the environment	60%
6	Attracting more tourism to the area in general	61%
7	Better information on where to go, what to do in the National Park, pre-arrival	53%
8	Better information on where to go, what to do, post arrival	51%
9	Better interpretation / promotion of the area's natural heritage / wildlife	47%
10	Better interpretation / promotion of the area's cultural/historic heritage	41%
11	Improving your own knowledge of the National Park to pass on to guests	44%
12	Improvements to signposting	49%
13	Tackling litter	52%
14	Improved / extended website / web pages on the National Park	40%
15	Better promotion of existing local events	39%
16	Better identification and promotion of local produce	43%
17	Strengthened image and branding for the National Park	47%
18	Improved existing visitor attractions	41%
19	Better identification and promotion of local arts / crafts	40%
20	Improved / better promoted public transport	49%
21	Improved dialogue on planning policies relating to tourism development	39%
22	Generally strengthening opportunities for enterprises in the NP to work together	35%
23	Concentrating on nature-related tourism (e.g. walking etc.)	35%
24	Improved provision for winter sports	37%
25	Improved provision for cycling	39%
26	Improved countryside access for walkers	32%
27	More local events	29%
28	Advice / training for enterprises on environmental management	27%

Rank	Priorities	% stating v. imp (i.e. a score of 5)
29	Joint marketing campaign for the National Park	31%
30	Improved process for keeping enterprises up to date on the National Park	29%
31	More packaging of accommodation and activities in the National Park	30%
32	Advice / training for enterprises on business and marketing	25%
33	Extending and promoting quality grading of enterprises	29%
34	Better promotion of existing guided walks	21%
35	Undertaking and distributing research on business and visitor trends	26%
36	Undertaking research into visitors and visitor trends	27%
37	Improved provision for horse riding	25%
38	Extending and promoting environmental accreditation of enterprises	23%
39	Spreading visitors across a wider area of the National Park	29%
40	More guided walks	20%
41	More visitor attractions	21%
42	Better traffic management	17%
43	Creating new tourism association(s) for enterprises in the Cairngorms area	16%

The results show that:

- Enterprises see the conservation of the landscape and wildlife as key requirements for their business success, above almost all others. They included 5 conservation-orientated priorities amongst their top 10 priorities.
- There was a concern about overall quality of the visitor experience and particular attributes such as attractions and facilities for activities such as winter sports, cycling and walking. This tended to be seen as a greater need than more facility provision.
- There is a strong call both for more tourism as a whole and for more at certain times of the year, with the latter being seen as slightly more important.
- Enterprises give a higher priority to specific promotional activity such as website development, branding, events and promotion of local produce and handicrafts, rather than to general joint marketing campaigns.
- There is a strong call for better information for visitors. This applies both to pre-visit and post-visit information.
- Enterprises offer equally strong endorsement of efforts to better promote and interpret the area's landscape and wildlife and its cultural and heritage.
- Enterprises appear to have very little appetite for the creation of a new Cairngorms-wide tourism association.

## ANNEX 2

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### *Further detail on reports and documents considered*

ASVA	Visitor Attraction Monitor: General Analysis for 2003 (relevant Cairngorms pages)	2003
CNPA	Branding Project Brief	June 2004
CNPA	Corporate Plan	2004
CNPA	Paper 2 Developing a Park for All – Social Inclusion	13 Aug 2004
CNPA	Paper 3 CNPA Advisory Groups	13 Aug 2004
CNPA	Paper 2 National Park Plan – Strategy for preparation	2 July 2004
CNPA	Paper 3 CNPA's Strategic Approach to Tourism	2 July 2004
CNPA	Paper 5 Gaelic Language – Interim Policy	4 June 2004
CNPA	Paper 3 Producing a Sustainable Tourism Strategy	13 Feb 2004
CNPA	Paper 1 The Key Issue for Tourism in the Cairngorms	16 Jan 2004
CNPA	Information Sheet on Pride and Passion Initiative, Scottish Forum	
CNPA	Workshop notes and programme from Sam Ham visit For developing an Interpretive Strategy for the Cairngorms	Sept 2004
CNPA	Project brief for Outdoor Access Strategy development	
CNPA	Sustainable tourism in Scotland's national parks: the search for effective frameworks for planning, action and evaluation	2004
Cairngorms Partnership	All Abilities Access Survey	2002
Cairngorms Partnership	The Cairngorms Local Biodiversity Action Plan	Nov 2002
Cairngorms Partnership	All Abilities Access Survey – Site Improvements paper	Jan 2003
Glasgow Caledonian University/University of Edinburgh	An Assessment of Economic Impact of Water related Recreation and Tourism in Spey Catchment	2003
NFO System Three	Visitor Research in Scotland's Proposed National Parks – Development of Common Baseline Information – Executive Summary	Mar 2003
Professor T Stevens	Sustainable Tourism in National Parks and Protected Areas – An Overview	2002
Scottish Enterprise	Sustainable Tourism in Grampian	1999
Scottish Parliament	Ministerial Statement on Tourism	Mar 2004
SQW Economic Development Consultants	Economic Baseline for the Cairngorms National Park & Surrounding Area	April 2003
Thirdway Scotland Ltd	Aviemore Mountain Resort – Sustainability Potential Assessment (Final report and Appendix)	Feb 2000
TMS Market Specialists	Products of the Park final report	April 2001
	The Highlands of Scotland Tourism Strategy (Exec Summary and full report)	Aug 1997
	Aberdeen & Grampian Tourism Strategy	

## ANNEX 3

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### Cairngorms National Park Visitor Survey 2004

This Survey was set up through a joint project with Loch Lomond and The Trossachs NP and ran at the same time to enable comparisons between the two National Parks to be drawn.

#### *Methodology*

A methodology combining face to face interviews and self completion questionnaires was developed.

#### *Face to Face Interviews*

A programme of face to face interviewing was conducted during the period May 2003 to April 2004 inclusive, with interviewers positioned at a variety of different locations to ensure coverage throughout the National Park and also provide a suitable number of potential respondents, as outlined in Table 1.

*Table 1: Interviewing Locations*

	<b>Number of Interviews</b>
Aviemore	233
Ballater	147
Balmoral Car Park	84
Balmoral Distillery Car Park – Royal Lochnagar	85
Braemar	171
Cairngorm – ski area car park	147
Carrbridge – Landmark Centre	110
Dinnet – Burn o’Vat car park	39
Glen Esk – car park	48
Glen Doll/Clova – car park	49
Glenlivet Distillery car park	86
Glenmore Road End	36
Glen Muick – car park	48
Glenshee - ski area car park	112
Glen Tanar – car park	50
Grantown-on-Spey	121
Kincraig Highland Wildlife Park	110
Kingussie	97
Laggan	96
Lecht - ski area car park	86
Loch Garten – Osprey Centre car park	72
Linn of Dee – car park	36
Newtonmore – Highland Folk Museum	72
Ralia – car park	36
Rothiemurchus – car park	72
Skye of Curr – Speyside Heather Centre	99
Tomintoul	107
Loch Morlich	51

2,500 face to face interviews were conducted using two different types of questionnaires. One for people resident within the National Park boundary (residents involving 415 interviews) and the other for people living outwith the National Park (visitors involving 2,084 interviews).

In addition, 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. Forty seven percent of respondents were interviewed at the weekend, with the remaining 53% being interviewed on a weekday

#### *Self Completion Questionnaires*

In addition 10,000 self completion questionnaires were distributed throughout the National Park, via a variety of methods including, through accommodation providers, visitor car parks including those where walkers may leave from, tourist information centres and orientation centres, tourist shops and in the street to tourists. A total of 1,076 self completion questionnaires were returned by the closing date for analysis

## **ANNEX 3**

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### ***Further detail on process of information gathering and involvement of tourism stakeholders***

#### **Postal Survey of Tourism Enterprises**

A database of tourism enterprises within the NP area was compiled by the CNPA using information gathered from the ATBs and VisitScotland and updated with other information provided by NP staff knowledge, local tourist and business association businesses databases and existing promotional material and leaflets etc. The database comprised some 600 addresses, and in response some 170 questionnaires were completed. An article about the survey was included in the NP newsletter 'Parklife' to encourage any tourism enterprises that had not received a survey to contact Park staff.

#### **Telephone Interviews**

In addition, in depth interviews were conducted with the following stakeholders:

Bob Kinnaird	Cairngorm Mountain Ltd
Louise Clark	Highland Council
Roger Edwards	Moray Badenoch and Strathspey Enterprise
Patricia Eccles	Nethy House and Monarch Country Marketing Group
Ian Reynolds	Scottish Enterprise Tayside
Sally Dowden	CNPA Board Member and Speyside Wildlife
Andy Wells	The Crown Estate, Glenlivet
Pierre Masson	The Moray Council
Sandy Dear	Tourism and the Environment Forum
Alastair MacLennan	CNPA Board Member & Balliefurth Farm/B&B/Self Catering
Elaine Booth	Scottish Enterprise Grampian
Scott Armstrong	Highlands of Scotland Tourist Board (HOST)
John Grant	Rothiemurchus Estate
Neil Black	VisitScotland
Bill Taylor	Scottish Natural Heritage, now Highlands and Islands Enterprise
Garry Marsden	Balmoral Estate
James MacFarlane	Local hotelier, Muckrach Lodge
Keith Newton	Aberdeenshire Council
Lucia Campbell	Aberdeen and Grampian Tourist Board

#### **Strategy Workshop to Discuss Key Issues**

Invitations to the workshop held in Ballater in October 2004 were sent to all CNPA Board members, all VISIT Forum members, all those tourism enterprises that returned their questionnaire and Park staff. The event was opened by the Convener of the CNPA Board and an example of the organisations, local groups and tourism enterprises is given below:

An Cala Guest House  
Association of Cairngorms Community Councils  
Balgonie Country House  
Ballater (Royal Deeside Ltd)  
Braemar Tourism Group  
CairnGorm Mountain Ltd  
Cairngorms Chamber of Commerce  
Crathie Opportunity Holidays

Glenlivet & Inveravon Community Association / Moray Tourism Forum  
John Muir Award  
Mar Lodge  
Marr Area Partnership  
National Trust for Scotland  
Pine Bank Chalets  
Rothiemurchus Estate  
Royal Deeside & the Mearns Tourism Forum  
RSPB  
Scottish LINK  
SNH  
Speyside Highland Leisure Park  
The Crown Estate, Glenlivet  
The Moray Council  
VisitScotland