



## **For information**

**Title: Sustainable Tourism Action Plan Update**

**Prepared by: Heather Trench, Sustainable Tourism Officer**

**Gavin Miles, Director of Planning & Place**

### **Purpose**

To update the Board on delivery of the Sustainable Tourism Action Plan 2022 - 27 and give wider context on associated policy developments.

### **Recommendations**

The Board is asked to:

- a) Note progress in delivery of the Sustainable Tourism Action Plan 2022 - 27.

### **Strategic context**

1. In 2022 the Board approved the five-year Sustainable Tourism Action Plan (STAP). The actions within the STAP set out the contribution of the wider tourism industry to the delivery of relevant National Park Partnership Plan 4 (NPPP4) objectives, as well contributing to Scotland Outlook 2030, the national tourism strategy. Oversight of the STAP lies with the Cairngorms Tourism Partnership, currently chaired by Park Authority Board member, Jackie Brierton. Delivery of the actions within the plan are carried out by a range of partners, who have all contributed to the compilation of this annual review of progress as detailed in Annex 1.
2. The Cairngorms National Park has been accredited with the European Charter for Sustainable Tourism in Protected Areas (the Charter) since 2005, shortly after designation as a National Park. The accreditation is awarded on the basis of a five-year strategy and action plan for sustainable tourism. NPPP4 acts as the overarching Sustainable Tourism Strategy for the Park and was submitted alongside the STAP in December 2022 as part of the re-application for the Charter. The Charter was officially re-awarded in November 2023 after an on-site verification visit. The Charter, and all the connections we make through the Europarc Network, significantly contributes to the reputation of the Cairngorms National Park in Europe.



## **Strategic policy considerations**

3. While delivery of the STAP is carried out at a local and regional level, it is shaped by the wider tourism policy environment, and there are several recent developments in National Tourism Policy that are worthy of note:
  - a) Tourism Legislation and business operating environment - Recent years have seen several pieces of legislation affecting the accommodation sector in particular. Since 2022 local authorities have been required to implement short term let (STL) licensing schemes, and Scotland's second STL control zone came into operation in 2024 in Badenoch and Strathspey. 2024 also saw the introduction of the Visitor Levy (Scotland) Act which allows local authorities to implement a percentage charge for overnight accommodation. Research suggests that this legislation, alongside an upcoming increase to employer's National Insurance Contributions, are impacting levels of business confidence.
  - b) VisitScotland - The focus of VisitScotland's work has continued to shift to a 'digital first' approach, ceasing to operate their Quality Assurance schemes, and closing the last remaining i-centres in 2025. Within the National Park, the Aviemore i-centre will close on 30 September and Ballater on 03 October. The Park Authority will continue to support the existing network of Local Information Centres, and we are working with Aberdeenshire Council and other partners on future plans for Ballater Royal Station and Station Square. VisitScotland's work will focus on getting information to visitors at the earlier holiday planning stage to influence decision-making.
  - c) Tourism Funding - The Rural Tourism Infrastructure Fund was set up in 2018 and is administered by VisitScotland. After a hiatus in 2024/25, the fund is now open again in 2025/26. Destination development funding from Highlands and Islands Enterprise to support Destination Management Organisations came to an end in 2024 and this has affected staff capacity for project delivery.

## **Key Areas of Activity**

4. A summary of progress across the full range of actions is included in Annex 1, but there are a few key areas of activity to note against each of the key outcomes.
  - a) Nature - The Cairngorms Business Partnership (CBP) continue to promote the 'Love Nature, Love Cairngorms National Park' campaign to encourage businesses to share engaging messages about responsible behaviour. There



has been particular interest in, and engagement with a series of videos by comedian Ed Byrne. CBP have also expanded their cycling mapping project, which promotes suggested routes that minimise disturbance.

- b) People - Tourism businesses were among the local employers that attended the successful 'Your Future Here' event to promote local career opportunities to a range of potential workers including young people from local schools. The recent resident survey will also give us valuable information about the experience of the local workforce in tourism and hospitality, as well as other sectors.
- c) Place - The Where Winter Comes to Life campaign is now in its third year, building on marketing research carried out in 2020 with the aim of boosting visitor numbers in the traditionally quieter months of the year. The main focus this year was a PR campaign to raise awareness of the Cairngorms as a winter destination and promote business ownership of, and involvement in, the campaign. Now in the later stages of the campaign, the focus has switched to digital promotion, and prize draws to capture data. There has been significant interest from businesses in involvement in future campaigns.

## **Research and Monitoring**

- 5. We commission a range of research to allow us to track key trends in the visitor economy and monitor progress against key indicators in NPPP4.
- 6. National Context - As well as commissioning our own local data, we monitor national data to understand the wider context of domestic and international tourism. The latest wave of the quarterly Scottish Tourism Index highlights a slight dip in domestic holidays in 2024 as more Scots started to travel overseas again after several years that saw an increase in domestic holidays in the wake of the Covid pandemic. There are early signs that 2025 may see an increase in domestic visits, but this is tempered by economic uncertainty and cost-of-living pressures. For international visitors, VisitBritain is estimating that 2024 was the strongest year on record for inbound tourism, with Scotland recovering particularly well compared with 2019 figures.
- 7. Visitor Volume and Value - We commission annual data from the Scottish Tourism Economic Activity Monitor (STEAM) model which gives us an estimate of monthly visitor numbers and the value of the local visitor economy. The most recent data



we have is for 2023 which showed visitor numbers of 2.15 million, the first time since 2019 that visitor numbers have exceeded 2 million. When compared with 2022 data, growth is notably strongest in the quieter off-peak months. The economic value of tourism was estimated at £419 million.

8. Visitor and Resident Surveys - The fifth Cairngorms Visitor Survey has been running since May 2024, with final interviews due to take place in April 2025. The data will then be analysed, with reporting expected in summer 2025. The research includes data on visitor motivations, demographics, activities and satisfaction, captured largely by face-to-face interviews at 35 key sites across the National Park, but supplemented for the first time by an online survey. Alongside the visitor research, for the first time we commissioned an online survey of people who live and/or work within the National Park. Analysis of those results is taking place now.
9. Business Sentiment - The Park Authority continues to support the Cairngorms Business Barometer run by the CBP. The survey now runs twice a year rather than quarterly and the last available data covers the period from May – October 2024. While many have reported an increase in turnover during 2024 and are optimistic for further growth into 2025, a significant minority (over one in four) reported decreases in turnover and have a negative outlook for the next 12 months. While concerns over rising costs have eased to some extent since Autumn 2023, they continue to be a significant challenge, as do concerns over rising bureaucracy and wider tourism trends.
10. Highlands and Islands Enterprise have also recently published results from their annual business panel survey. Confidence in the economy dropped in this survey, to its lowest reported level since October / November 2022. Over the past six months, most businesses had either performed well or had been fairly steady, but more than a quarter had struggled.

## **Next Steps**

11. The next annual update on STAP delivery will take place in March 2026 and will include a wider mid-term review of the plan, which may include amendments to actions where appropriate in light of the changing tourism landscape.



**Cairngorms**  
National Park Authority

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**Mhonaidh Ruaidh**

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**Gavin Miles**

**13 March 2025**

[gavinmiles@cairngorms.co.uk](mailto:gavinmiles@cairngorms.co.uk)

**Heather Trench**

**13 March 2025**

[heathertrench@cairngorms.co.uk](mailto:heathertrench@cairngorms.co.uk)