



# Topic: Tourism

Engagement version August 2024

## Requirements addressed in this section

Table 1 Information required by the Town and Country Planning (Scotland) Act 1997, as amended, regarding the issue addressed in this section.

Section	Requirement
Section 15(5)(a)	the principal physical, [cultural], [economic], social, [built heritage] and environmental characteristics of the district,
Section 15(5)(b)	the principal purposes for which the land is used,

## Links to evidence

- National Parks (Scotland) Act 2000  
<https://www.legislation.gov.uk/ukpga/1997/8/contents>
- Town and Country Planning (Scotland) Act 1997  
<https://www.legislation.gov.uk/ukpga/1997/8/contents>
- Scotland Outlook 2030: Responsible Tourism for a Sustainable Future.  
<https://scottishtourismalliance.co.uk/wp-content/uploads/2020/03/Scotland-Outlook-2030.pdf>
- Visit Scotland Visitor Management Plan  
<https://www.visitscotland.org/about-us/what-we-do/working-in-partnership/visitor-management-plan#management>
- Our Past Our Future; The Strategy for Scotland's Historic Environment  
<https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=79204155-9eb2-4d29-ab14-aff200ec2801>
- National Park (Scotland) Act 2000  
<https://www.legislation.gov.uk/asp/2000/10/contents>
- National Planning Framework 4  
<https://www.gov.scot/publications/national-planning-framework-4/documents/>



- Cairngorms National Park Partnership Plan 2022 – 2027  
<https://cairngorms.co.uk/wp-content/uploads/2022/09/Cairngorms-National-Park-Partnership-Plan-full-version-FINAL.pdf>
- Cairngorms National Park Local Development 2021  
[https://cairngorms.co.uk/wp-content/uploads/2021/03/CNPA-LDP-2021\\_100dpi.pdf](https://cairngorms.co.uk/wp-content/uploads/2021/03/CNPA-LDP-2021_100dpi.pdf)
- Cairngorms Sustainable Tourism Action Plan 2023 – 2028  
<https://cairngorms.co.uk/wp-content/uploads/2023/04/221208STAP23-28.pdf>
- Cairngorms Sustainable Tourism Infrastructure Development Plan 2023 – 2028  
<https://cairngorms.co.uk/wp-content/uploads/2024/04/Cairngorms-Strategic-Tourism-Infrastructure-Development-Plan-V2.pdf>
- Cairngorm Mountain – Cairngorms National Park Authority Working Principles  
<https://cairngorms.co.uk/wp-content/uploads/2019/04/Cairngorm-Mountain-CNPA-Working-Principles-converted.pdf>
- Cairngorm Mountain Masterplan  
[https://www.hie.co.uk/media/10744/cairngorm-mountain-masterplan\\_2021.pdf#:~:text=Cairngorm%20stakeholders.%20The%20masterplan%20aims%20to%20highlight%20the,goal%20is%20to%20harness%20and%20optimise%20...%20](https://www.hie.co.uk/media/10744/cairngorm-mountain-masterplan_2021.pdf#:~:text=Cairngorm%20stakeholders.%20The%20masterplan%20aims%20to%20highlight%20the,goal%20is%20to%20harness%20and%20optimise%20...%20)
- Cairngorms National Park Local Development Plan 2021 Action Program  
<https://cairngorms.co.uk/wp-content/uploads/2022/09/Local-Development-Plan-2021-Action-Program-2022.pdf>
- Cairngorms National Park Authority Action Program 2022  
<https://cairngorms.co.uk/wp-content/uploads/2022/09/Local-Development-Plan-2021-Action-Program-2022.pdf>
- Managing for Visitors Plan 2023  
[https://cairngorms.co.uk/wp-content/uploads/2023/03/230223CairngormsNPManagingforVisitorsPlan\\_2023.pdf](https://cairngorms.co.uk/wp-content/uploads/2023/03/230223CairngormsNPManagingforVisitorsPlan_2023.pdf)
- Cairngorms Visitor Survey 2019 / 2020



<https://cairngorms.co.uk/wp-content/uploads/2020/07/10304-Cairngorms-Visitor-Survey-2019-20-Final-Report-100720-FINAL.pdf>

- Cairngorms National Park Core Paths Plan (2015)  
<https://cairngorms.co.uk/wp-content/uploads/2015/06/CorePathsPlanFinal150727.pdf>
- Advie and Cromdale Community Action Plan  
<https://cairngorms.co.uk/wp-content/uploads/2020/12/2013CromdaleAdvieActionPlan.pdf>
- Aviemore Community Action Plan Review 2017  
<https://cairngorms.co.uk/wp-content/uploads/2020/12/2017-Aviemore-CAP-Review.pdf>
- Ballater & Crathie Community Action Plan 2023  
[https://www.ballaterandcrathiecommunitycouncil.com/\\_files/ugd/ff0841\\_f2f9573586ef4cf3a753d7a57adcb57c.pdf](https://www.ballaterandcrathiecommunitycouncil.com/_files/ugd/ff0841_f2f9573586ef4cf3a753d7a57adcb57c.pdf)
- Blair Athol Community Action Plan: Looking to 2030  
<https://cairngorms.co.uk/wp-content/uploads/2023/08/Blair-Atholl-Struan-Community-Action-Plan-2023-final.pdf>
- Boat of Garten Action Plan Review 2018  
<https://cairngorms.co.uk/wp-content/uploads/2020/12/2018-Boat-of-GartenAction-Plan.pdf>
- Braemar Community Action Plan  
<https://cairngorms.co.uk/wp-content/uploads/2021/01/2017-BraemarAction-Plan.pdf>
- Carrbridge Community Action Plan: Looking to 2030  
<https://cairngorms.co.uk/wp-content/uploads/2022/07/Carrbridge-Community-Action-Plan-2022.pdf>
- Dalwhinnie Community Action Plan: Looking to 2023  
<https://cairngorms.co.uk/wp-content/uploads/2024/03/DalwhinnieCAP2023Report.pdf>



- **Dulnain Bridge Community Action Plan Review 2016**  
<https://cairngorms.co.uk/wp-content/uploads/2020/12/2016-Dulnain-Bridge-ActionPlan.pdf>
- **Mount Blair Community Action Plan**  
[https://cairngorms.co.uk/wp-content/uploads/2021/01/1013\\_18-Mountblair-and-Glenshee-Action-Plan.pdf](https://cairngorms.co.uk/wp-content/uploads/2021/01/1013_18-Mountblair-and-Glenshee-Action-Plan.pdf)
- **Grantown on Spey Community Action Plan**  
<https://cairngorms.co.uk/wp-content/uploads/2020/12/160803-GrantownIconicPlan.pdf>
- **Kincraig Community Action Plan**  
<https://cairngorms.co.uk/wp-content/uploads/2015/07/2011-KincraigActionPlan.pdf>
- **Kingussie Community Action Plan 2018**  
<https://cairngorms.co.uk/wp-content/uploads/2021/01/2018-Kingussie-Action-Plan.pdf>
- **Laggan Community Action Plan: Looking to 2023**  
<https://cairngorms.co.uk/wp-content/uploads/2023/02/Laggan-Community-Action-Plan-2022.pdf>
- **Nethy Bridge Community Action Plan: Looking to 2030**  
<https://cairngorms.co.uk/wp-content/uploads/2024/03/Nethy-Bridge-Community-Action-Plan-2023-1.pdf>
- **Newtonmore Community Action Plan: Looking to 2023**  
<https://cairngorms.co.uk/wp-content/uploads/2022/07/Newtonmore-Community-Action-Plan-2022.pdf>
- **Strathdon Community Action Plan 2016**  
<https://cairngorms.co.uk/wp-content/uploads/2015/04/160601StrathdonActionPlan.pdf>
- **Scottish Parliament (2022). Scottish Tourism Month 2022. Meeting of the Parliament. Accessed 06/06/2023.**



<https://www.parliament.scot/chamber-and-committees/official-report/search-what-was-said-in-parliament/chamber-and-committees/official-report/what-was-said-in-parliament/meeting-of-parliament-22-03-2022?meeting=13658&iob=123961>

- Oxford Economics Report 2022  
<https://cairngorms.co.uk/wp-content/uploads/2024/06/Economic-Forecasts-Cairngorms-National-Park-2022.pdf>
- Visit Cairngorms  
<https://www.visitcairngorms.com/>
- Cairngorms National Park STEAM Report 2022  
<https://cairngorms.co.uk/wp-content/uploads/2024/01/CNP-STEAM-Infographic-2022.pdf>
- Cairngorms Business Partnership Business Barometer Reports  
<https://www.cairngormschamber.com/membernews.html>
- The economic, social, and cultural impact of Scotland's snowsports sector 2022  
<https://www.gov.scot/binaries/content/documents/govscot/publications/research-and-analysis/2023/02/economic-social-cultural-impact-scotlands-snowsports-sector-2022/documents/economic-social-cultural-impact-scotlands-snowsports-sector-2022/economic-social-cultural-impact-scotlands-snowsports-sector-2022/govscot%3Adocument/economic-social-cultural-impact-scotlands-snowsports-sector-2022.pdf>
- VisitScotland / Scottish Enterprise Scotland Golf Visitor Survey 2016 Final Report  
<https://www.scottish-enterprise.com/media/hcjpgsyq/scotland-golf-visitor-survey-and-economic-impact-2016-full-report.pdf>
- Assessing the economic impacts of nature-based tourism in Scotland  
<https://www.nature.scot/sites/default/files/2019-07/Publication%202010%20-%20SNH%20Commissioned%20Report%20398%20-%20Assessing%20the%20economic%20impacts%20of%20nature%20based%20to%20urism%20in%20Scotland.pdf>
- Summary Report – The socioeconomic and biodiversity impacts of driven grouse moors and the employment rights of gamekeepers  
<https://www.gov.scot/binaries/content/documents/govscot/publications/research->



and-analysis/2020/11/summary-report-socioeconomic-biodiversity-impacts-driven-grouse-moors-employment-rights-gamekeepers/documents/summary-report-socioeconomic-biodiversity-impacts-driven-grouse-moors-employment-rights-gamekeepers/summary-report-socioeconomic-biodiversity-impacts-driven-grouse-moors-employment-rights-gamekeepers/govscot%3Adocument/summary-report-socioeconomic-biodiversity-impacts-driven-grouse-moors-employment-rights-gamekeepers.pdf

- Socio-economic and biodiversity impacts of driven grouse moors in Scotland. Part 1. Socio-economic impacts of driven grouse moors in Scotland  
<https://sefari.scot/document/socio-economic-and-biodiversity-impacts-of-driven-grouse-moors-in-scotland-part-1-socio>
- Socio-economic and biodiversity impacts of driven grouse moors in Scotland: Part 3: Use of GIS / remote sensing to identify areas of grouse moors, and to assess potential for alternative land uses  
<https://sefari.scot/document/socio-economic-and-biodiversity-impacts-of-driven-grouse-moors-in-scotland-part-3-use-of>
- CORINE Land Cover data  
<https://land.copernicus.eu/en/products/corine-land-cover>
- Scotch Whisky's Economic Impact 2022  
<https://www.scotch-whisky.org.uk/media/2170/scotch-whisky-economic-impact-report-2024.pdf>



## Summary of evidence

### Policy context

#### **National Park (Scotland) Act 2000**

The National Park has four distinct aims as set out in The National Parks (Scotland) Act 2000). Two of the four aims of the National Park Act are particularly relevant in the context of visitor infrastructure and the visitor economy. The third aim is 'to promote understanding and enjoyment of the special qualities of the area by the public'. The fourth aim is 'to promote sustainable economic and social development of the area's communities'. The aims are all to be pursued collectively. However, if there is conflict between the first aim and any of the others, greater weight is given to the first aim (as set out in Section 9(6) of the 2000 Act).

#### **Scotland Outlook 2030: Responsible Tourism for a Sustainable Future**

The National Strategy for tourism in Scotland to be delivered by the following partners: Scottish Tourism Alliance, Scottish Government, VisitScotland, Scottish Enterprise, Highlands and Islands Enterprise and Skills Development Scotland. Recognising the importance of the tourism sector to Scotland's economic strategy, it supports the vision of Scotland becoming a 21st century tourism world leader. The strategy delivers strong focus on sustainability delivered through the four main priorities:

- Our passionate people – adoption of fair work practices and increased career mobility in the sector. Seeking to increase diversity in the sectors' workforce.
- Our thriving places – engage local communities to become stakeholders in the sector, to assist Destination Management Organisation's to manage tourism effectively and responsibly.
- Our diverse businesses – supporting the sector to become more entrepreneurial, agile and resilient. Also driving change to help the sector commit to sustainable practices.
- Our memorable experiences – recognising the need to ensure the sector is delivering inclusive and accessible destinations.

The Cairngorms Business Partnership act as the Destination Management Organisation for the National Park Area, delivered through [www.visitcairngorms.com](http://www.visitcairngorms.com).

Scotland Outlook 2030 advocates for sustainable growth with everyone playing and active role, while protecting people and place. Its mission, recognising the need for increased inclusion is that; 'Together we will grow the value and positively enhance the benefits of tourism across Scotland by delivering the very best for our visitors, our businesses, our people, our communities and our environment.'



The strategy further highlights the need for net-zero within the tourism sector to contribute to the national ambition of a net-zero Scotland by 2045. To achieve its vision six national priorities have been identified namely:

1. Improving Digital Infrastructure and use in understanding the sector through data collection and analytics.
2. Strong policy that supports the 21st century tourism vision.
3. Access to public and private investment to ensure continued growth.
4. Improving connectivity – through better transport and digital connectivity infrastructure.
5. Better collaboration through stronger cross sector networking to improve collaboration delivering greater economic value.
6. Positioning Scotland's tourism industry both nationally and internationally to attract growth in both visitor numbers and employment opportunities.

## **Visit Scotland Visitor Management Plan**

This is Visit Scotland's coordinated Scotland-wide strategic approach which aims to educate key audiences to enjoy Scotland's countryside responsibly. It pulls together the current and planned actions into a cohesive and aligned direction of travel.

The Plan offers a vision of how the visitor experience in Scotland will develop over a 10-year period. An action log records progress against its four strategy pillars:

- Educating our current and future visitors.
- Investing in Scotland's current and future visitor management infrastructure and services.
- Delivering a joined up and cohesive action plan across Scotland.
- Becoming and remaining a world leader in visitor management.

The Plan identifies the Cairngorms National Park as a key management hotspot. This approach to managing the challenges associated with this status are set out within the Park Authority's Sustainable Tourism Action Plan and Sustainable Infrastructure Plan.

## **Our Past, Our Future: The Strategy for Scotland's Historic Environment 2023**

Our Past, Our Future recognises the importance historic environmental to the visitor economy and a number of its priorities seek to encourage sustainable tourism. These are:





- Priority 1 – Delivering the transition to net zero, which will include work to reduce emissions from heritage tourism visits.
- Priority 3 – Building a wellbeing economy, which will include work to develop and share approaches to responsible tourism, ensuring tourism contributes to the economy without being detrimental to communities and the environment.

These priorities align with those of National Planning Framework 4 and the National Park Partnership Plan 2022 – 2027 and the Local Development Plan may support these through its spatial strategy.

## **National Planning Framework 4**

The National Planning Framework 4 sets out the National Spatial Strategy for Scotland. Its focus on the three main policy themes of sustainable, liveable and productive places aligns with Scotland's aim of delivering on the United Nations Sustainable Goals. National Planning Framework 4, in relation to tourism, aims to deliver net zero alongside a well-being economy.

Policy 30 specifically addresses tourism, which is intended to encourage, promote and facilitate sustainable tourism development which benefits local people, is consistent with our net zero and nature commitments, and inspires people to visit Scotland. According to the policy Local Development Plans must:

- Support the recovery, growth and long-term resilience of the tourism sector.
- Take account of relevant national and local sector driven tourism strategies.

And have a spatial strategy that:

- Identify suitable locations which reflect opportunities for tourism development by taking full account of the needs of communities, visitors, the industry and the environment.
- Identify areas of pressure where existing tourism provision is having adverse impacts on the environment or the quality of life and health and wellbeing of local communities, and where further development is not appropriate.

Other key policy connections include: 1, 2, 4, 7, 10, 13, 14, 16, 17, 23, 25, 27, 28, 29, 31.

## **National Park Partnership Plan 2022 – 2027**

While the National Park Partnership Plan must be considered as a whole, the following objectives are of particular relevance to this topic:



- B10. A Park for all aims to ensure that better opportunities for everyone to enjoy the National Park. This means promoting and supporting a visitor profile that is more diverse, especially in regard to people who are disabled, from low socio-economic backgrounds, LGBTQ+ and visitors from minority ethnic groups.
- C1. Housing aims to ensure that there is sufficient affordable housing stock to enable people to live and work within the National Park. The Partnership Plan sets out the need to understand better the economic and social dynamics behind second homes, vacant and short-term lets, and reduce the loss of existing or newly-built properties to such uses.
- C5. Visitors to the National Park aims to stabilise visitor numbers in the peak season, focusing growth on quieter months and on those areas that have the infrastructure and capacity to accommodate additional visitors.
- C6. A sustainable destination aims to secure the National Park's reputation as an international exemplar in sustainable tourism and management of protected areas.
- C7. Transport to and around the National Park seeks to address the need to improve the public transport and active travel provision in the National Park for visitors (and residents). The targets set out by the policy will require additional infrastructure to support the goals. Specifically targets include: 20% of current journeys by visitors, commuters and residents to be completed by a means other than cars, and 25% of visitors to access the National Park by public transport. The latter is, to a great extent outwith the control of the Park Authority, reliant on improvements to national public transport operations. Provision in the next Local Development Plan should be made for E-bike and adapted bike hire facilities and charging facilities in all the major visitor hubs by 2030.
- C8 Accessible path and cycle network seeks to address the need to improve the existing path, cycle and outdoor access networks in the National Park. To comply with the policy the Local Development Plan should encourage the development of additional safe and inclusive off-road or segregated on-road routes between communities by 2030.
- C9. High-quality visitor experience addresses the need for better infrastructure to support increased capacity while reducing visitor impact. The next Local Development Plan will need to ensure development supports the need for increased toilet and changing facilities for people with additional needs (Policy C4).

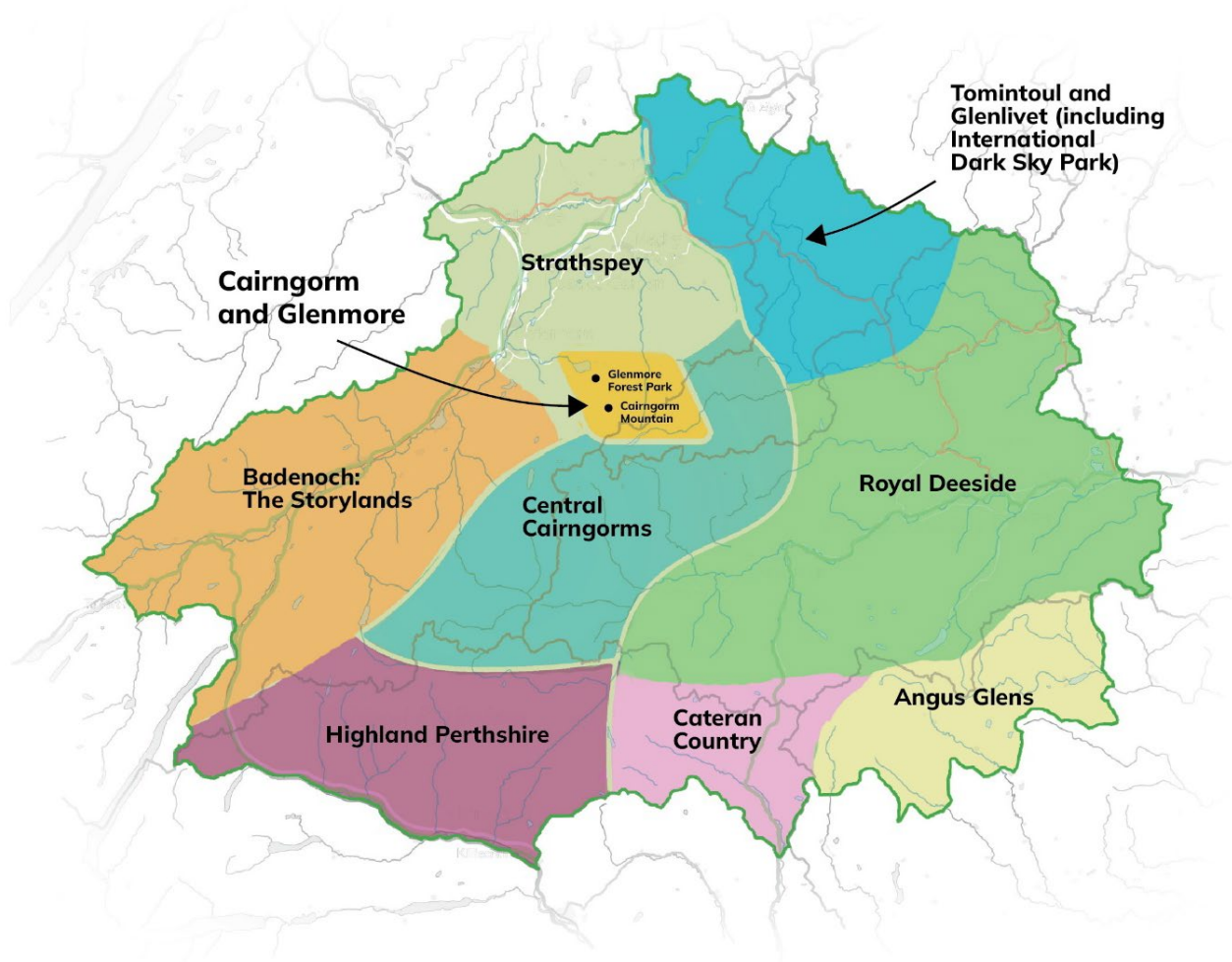


Figure 1 Visitor experience areas in the Cairngorms National Park (Cairngorms National Park Partnership Plan, 2022). Contains Ordnance Survey data © Crown copyright and database right 2024.

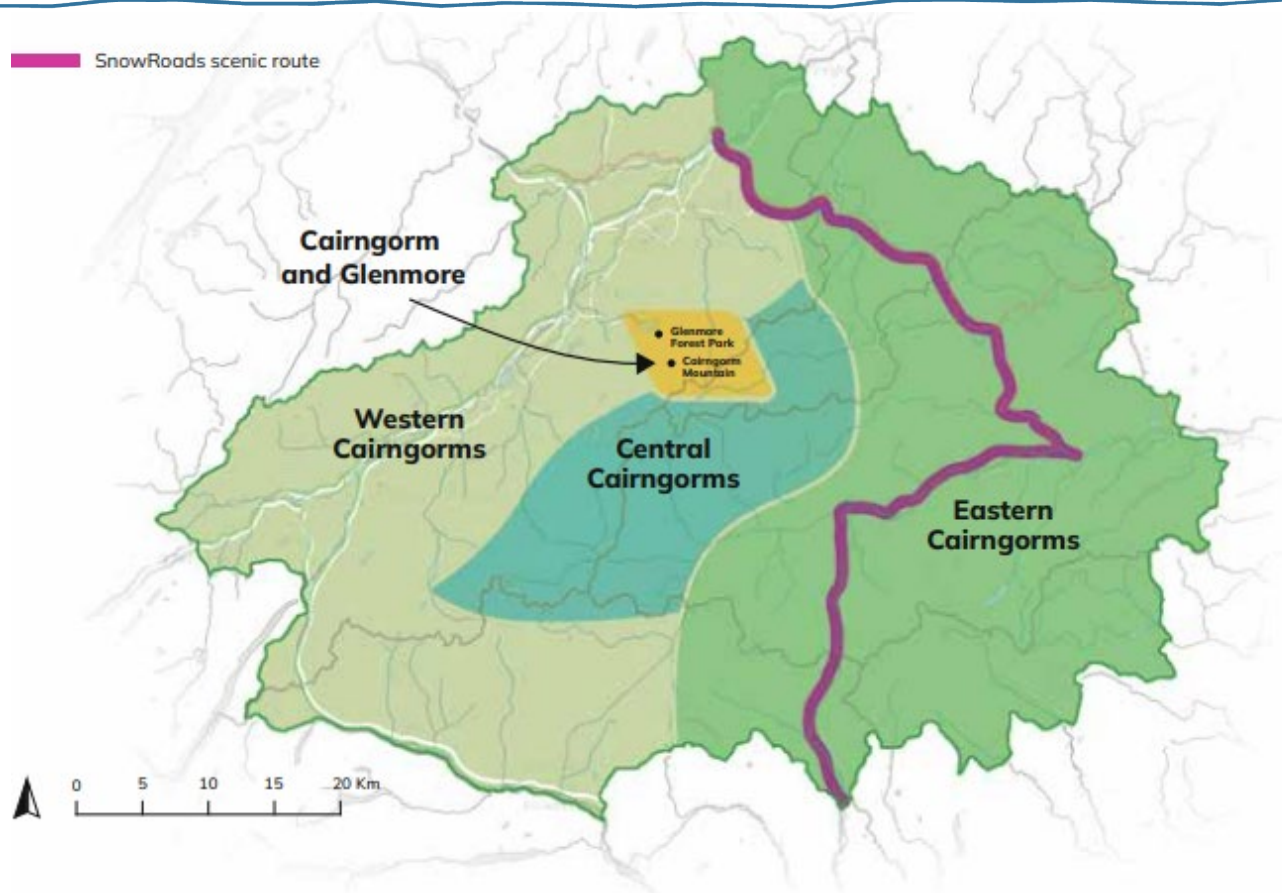


Figure 2 Visitor infrastructure in the Cairngorms National Park (Cairngorms National Park Partnership Plan, 2022). Contains Ordnance Survey data © Crown copyright and database right 2024.

Opportunities for future tourism growth can be supported through the Local Development Plan through the facilitating the rehabilitation of redundant rural buildings (Policy C3) and reduction of reliance on private car use for journeys in and around the National Park. New tourism development in the National Park will also need to positively contribute to the sense of place (Policy C3).

Policy C6 addresses the need to protect archaeological sites and their settings. The next Local Development Plan needs to have regard for existing sites of cultural or historical relevance. Any proposed spatial strategy needs to also ensure it protects and enhances the built heritage and designed landscapes (Policy C6).

## Cairngorms 2030

The Heritage Horizons 2030 (long-term) projects will support the delivery of the National Park Partnership Plan 2022 – 2027. Projects that relate to the development of the next Local Development Plan with regard to tourism development include:

- Community arts and culture programme



- Active communities
- Cairngorms Active Travel Plan
- E-bike network
- Glenmore transport plan
- Sustainable transport in the National Park

Matters relating to transport in the Cairngorms National Park will be covered in the Sustainable Transport section of the Evidence Report.

## **Cairngorms Tourism Partnership**

The Cairngorms Tourism Partnership was established in 2014 and brings together tourism businesses and organisations with key public sector partners. Meetings are generally held twice a year and the remit of the partnership includes:

- Drawing up and overseeing the implementation of a Cairngorms Tourism Action Plan to set agreed priorities for the development and marketing of tourism.
- Input to the national tourism strategy and review of local alignment.
- Securing resources to ensure effective delivery of the Area Tourism Partnership Plan.
- Acting, where appropriate, as a lobbying body to further the interests of local tourism, hospitality and leisure industries.
- Acting as a link between public and private sectors.
- Acting as a vehicle to engage the industry.

Promoting the importance of economic, environmental, and social sustainability as a key consideration in all discussions and delivery. The tourism partnership consists of representatives from the following agencies and organisations:

- Aberdeenshire Council
- Atholl Estates
- Balmoral Estate
- Cairngorms Business Partnership
- Glenlivet Distillery
- The Highland Council
- Highlands and Islands Enterprise
- Landmark Visitor Centre
- Moray Speyside Tourism
- RSPB Scotland
- Strathdon Tourism Group
- VisitAberdeenshire
- VisitScotland
- Voluntary Action in Badenoch and Strathspey



## **Sustainable Tourism Action Plan 2023 – 2028**

This document is the Action Plan for 2023 – 2028, and it sits within the wider context of the National Park Partnership Plan 2022 – 2027 which acts as the overarching Sustainable Tourism Strategy.

The Cairngorms National Park has been accredited with the European Charter for Sustainable Tourism in Protected Areas since 2005, shortly after designation as a National Park. Every five years the National Park reviews its progress in the previous five-year period, assessing what has changed and prepare a new strategy and action Plan for Sustainable Tourism.

To support the delivery of the Sustainable Tourism Action Plan the Local Development Plan will need to:

- Make provision for the opportunity to support, encourage and promote community-led tourism enterprises in the National Park.
- Develop and implement mechanisms to reduce disturbance on key species and recreational impacts on high ground.

The Local Development Plan should also help promote investment in tourism assets produced by previous place-based initiatives (see Figure 1 and Figure 2), which include:

- Badenoch Storylands – an interactive map is available online at:  
<https://badenochstorylands.com/interactive-map/>
- Snow Roads Scenic Route – route available online at:  
[https://www.snowroads.com/snowroads\\_route\\_map.pdf](https://www.snowroads.com/snowroads_route_map.pdf)
- Tomintoul and Glenlivet Dark Sky Park (see Landscape topic paper for more details<sup>1</sup>)
- Cateiran Eco museum further information available online at:  
<https://cateranecomuseum.co.uk/>
- Speyside Way and Deeside Way (Figure 3).

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<sup>1</sup> <https://cairngorms.co.uk/wp-content/uploads/2024/07/Topic-paper-Landscape-Engagement-version.pdf>



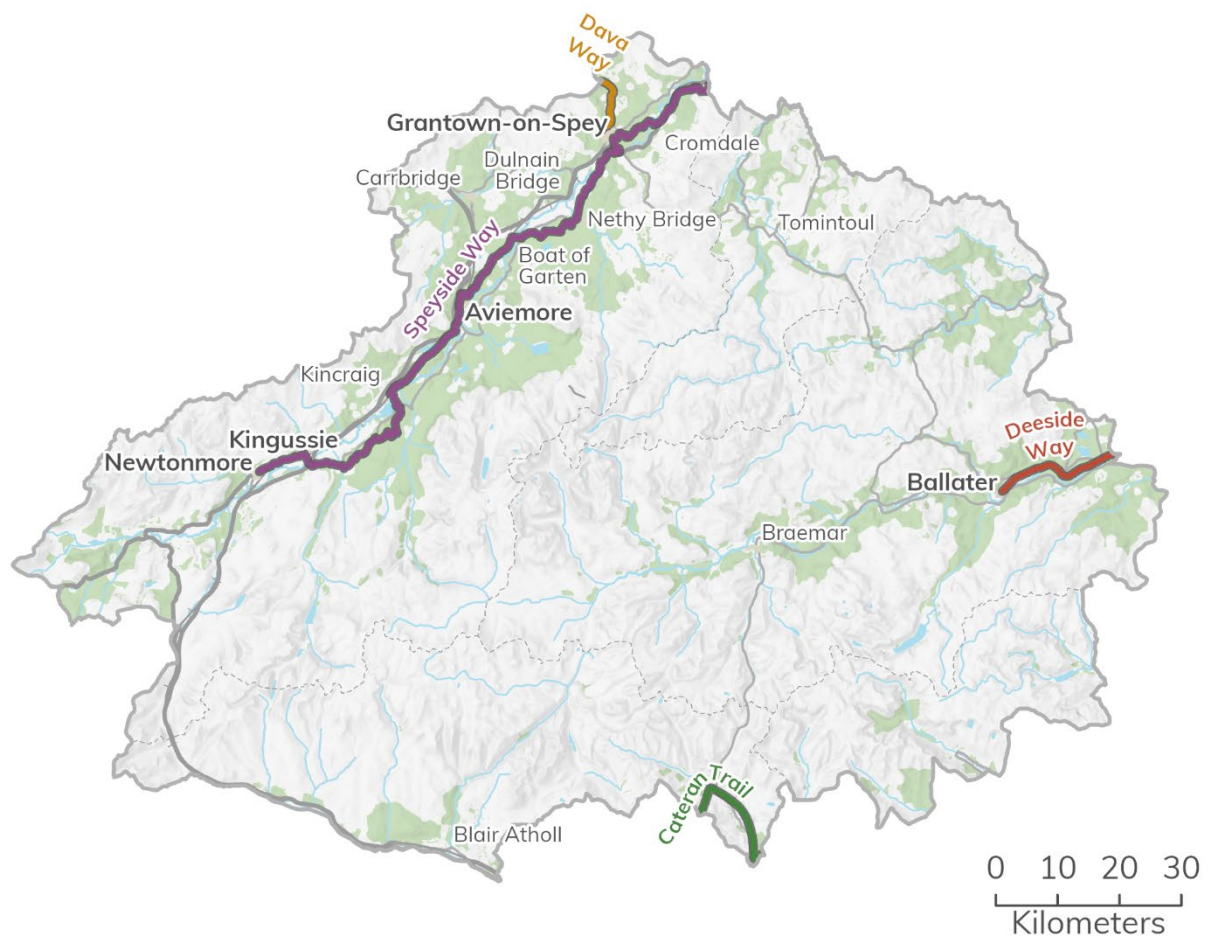


Figure 3 Long distance trails within the Cairngorms National Park. Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2024. All rights reserved. Ordnance Survey Licence number 100040965, Cairngorms National Park Authority.

Alongside this Sustainable Tourism Action Plan sits a Sustainable Tourism Infrastructure Plan that sets out a strategic approach to investment in, and maintenance of, tourism and visitor infrastructure in the Cairngorms National Park.

## **Sustainable Tourism Infrastructure Development Plan 2023 – 2028**

The Sustainable Tourism Infrastructure Development Plan is the Action Plan for 2023 – 2028, and it sits within the wider context of the National Park Partnership Plan 2022 – 2027 which acts as the overarching Sustainable Tourism Strategy.

The Sustainable Tourism Infrastructure Plan has been prepared to add value to the new National Park Partnership Plan 2022 – 2027 by assessing the tourism infrastructure within the National Park through a process that includes:

- Developing a clear picture of existing tourism infrastructure provision



across the Cairngorms National Park.

- Identifying pressure points or gaps in provision on either a site specific or issue basis.
- Identifying and prioritising tourism infrastructure improvements including those that can be delivered or taken to 'shovel read' stage in the near future.
- Developing a strategic approach to facility and path maintenance and upgrades.
- Developing appropriate data gathering and asset management systems to support future management of tourism infrastructure.

The Plan serves the function of an internal management tool to prioritise local investment and to assist in directing Park Authority resources. It is also the recognised Strategic Plan for the National Park against which future bids for Rural Tourism Infrastructure funding applications can be assessed.

The Plan helps identify a number of potential projects predominantly at visitor pressure points and give broad cost estimates for delivery. It provides an agreed list of strategic priorities that can support funding applications by both the National Park Authority and partners as well as facilitating quicker delivery of projects as further funding becomes available.

Many of the projects outlines in the Sustainable Tourism Infrastructure Plan will be covered by the overarching Mobility topic paper, however, are listed here because of their relevance to the wider topic of tourism.

The proposed projects in the Sustainable Tourism Infrastructure Plan aim to address a wide range of identified problems at different locations across the National Park (Table 2) including:

- Improvements to signage
- Improvements access and parking management
- Improvements to the active travel networks
- Improvements to riverside access
- Extending the electric vehicle charging network
- Improvements to motorhome facilities and coach parking availability.





Table 2 Summary of the proposed projects for investment set out in the Sustainable Tourism Infrastructure Plan 2023 – 2028.

Number	Location	Project type	Priority
1	Various	Rail Entry Point Signage	Medium
2	Various	Signage at Main Bus / Coach Entry Points	Medium
3	Various	Active Travel Infrastructure	Varies
4	Glenmore	Old Logging Way Active Travel Improvements	High
5	Various	Public Transport Infrastructure	High
6	Various	Enhancing the EV charge point network	Medium
7	Cairngorm Mountain	Cairngorm Mountain parking and active travel improvements	High
8	Glenmore	Parking management & visitor improvements	High
9	Ryvoan	Toilets and management of visitor pressures	Medium
10	Tullochgrue	Parking management	Medium
11	Loch an Eilean	Active Travel infrastructure and accessibility	High
12	Badenoch	Storylands Heritage sites parking	Medium
13	Glen Feshie	Parking management	Medium
14	Uath Lochans	Parking management	Medium
15	Feshie Bridge	Parking management & trail improvements	Medium
16	Kincraig Bridge	Parking and river access	Medium
17	Aviemore	Parking and transport facilities	High
18	Loch Pityoulish	Parking and improved access	Medium
19	Loch Vaa	Parking and improved access	Medium
20	Loch Garten	Trail improvements & car park connections	High
21	Grantown on Spey	Parking management	Medium
22	Tomintoul / Glenlivet	Motorhome facilities	Medium
23	Auchnerran	Parking & access improvements	Medium
24	Cambus 'oMay	Parking management & access improvements	High
25	Ballater	Coach Parking	Medium
26	Balmoral	Parking management & pedestrian access improvements	High
27	Angus Glens	Parking and sense of arrival improvements	Medium



Number	Location	Project type	Priority
28	Spittal of Glenshee	Motorhome, toilet and active travel facilities	Medium
29	Blair Atholl	Parking and active travel improvements	Medium
30	Various	Network of motorhome facilities	Medium
31	Snow Roads	Summit signage	Medium
32	Glenmore	Meall a' Bhuachaille path	Medium / High
33	Various	Core path network condition survey	High

## Managing for Visitors Plan 2023

The Park Authority and its partners have been working within the national visitor management framework #RespectProtectEnjoy and the #CairngormsTogether framework to develop Managing for Visitors plans for key areas in the National Park. The Managing for Visitors Plans dovetail and support site-based visitor management plans and estate management objectives. The purpose of the Managing for Visitors Group is to:

- Provide a warm welcome and support exceptional experiences for the public to enjoy the outdoors.
- Mitigate any negative impacts from increased recreation in sensitive or popular sites.
- Reduce potential conflict between residents and visitors.
- Promote collaboration across estate and organisational boundaries, ensuring a positive visitor experience.
- Agree visitor infrastructure priorities for the area.

The group brings together the principal land managers from the public, private and third sectors, local authorities, NatureScot and emergency services.

The summers of 2020 and 2021 were unprecedented in terms of the changes that were seen in visitor distribution and behaviour in the National Park. A combination of circumstances, including the easing of lockdown policies and the desire of visitors to experience the outdoors and nature, put significant new pressures on certain locations in the National Park.

New arrangements for managing for visitors were put in place with partners during this time. These arrangements were comprehensively reviewed by the Park Authority Board in December 2021 – papers are available at:



- <https://cairngorms.co.uk/working-together/meetings/meeting/board-2021-11-26/>
- <https://cairngorms.co.uk/working-together/meetings/meeting/board-2021-11-26/>

These arrangements were continued for 2022.

Future development will need to secure confidence within the communities in the National Park that the National Parks special landscape qualities are being considered and protected with regard to development. Regional partners, and potential stakeholders for consultation, that are key to delivering the objectives of the Managing for Visitors Plan include:

- Local authorities
- Cairngorms Business Partnership
- Partner ranger services
- Land managers
- Owners / managers of key visitor sites
- NatureScot
- Police Scotland
- Scottish Fire and Rescue
- Volunteers and volunteer rangers

The focus of managing for visitors' measures will be on the proactive, safe management of key countryside sites simplified into two broad areas:

- Rural 'hot spots'
- Rural 'warm spots'

Figure 4 shows the identified rural 'hotspots' and 'warm spots' in the Cairngorms National Park. These locations have been identified as locations in the National Park that present a potential risk associated with tourism related infrastructure pressure during peak visitor periods.



The risk ratings used in Figure 4 for each site are defined as follows:

**Hot**

Very popular, pinch points on trails, could be on a dead-end road, limited parking and overspill sites, popular hills or beauty spots, bridges, heavily promoted by third parties, close to main transport routes, for example trunk roads and accessible from large towns.

**Warm**

Popular, parking previously sufficient for level of use, setting off point for hills or beauty spots and promoted by third parties, likely to experience overspill from nearby popular sites.

Rural 'hot and warm spots'



Visitor 'hot spots'



Visitor 'warm spots'

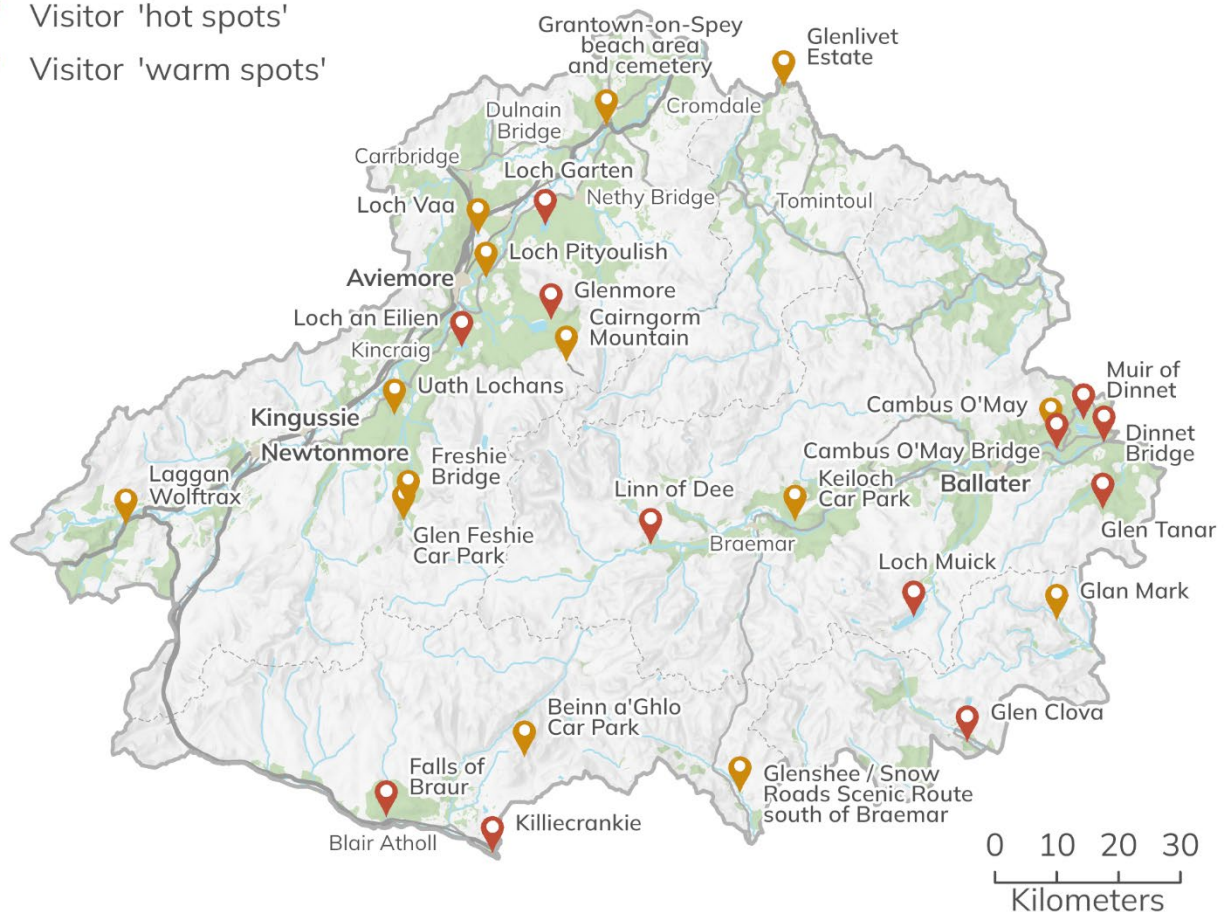


Figure 4 Rural visitor 'hot spots' and 'warm spots' in the Cairngorms National Park (Cairngorms National Park Authority Managing for Visitors Plan 2023). Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2024. All rights reserved. Ordnance Survey Licence number 100040965, Cairngorms National Park Authority.



Priorities identified in the Managing for Visitors Plan to which the Proposed Plan should have regard for include provision for are:

- Variable message electronic signs at various key locations.
- Potential for additional parking to serve tourist 'hot spots'.
- Additional toilets and accessible toilets and changing facilities.
- Additional signage to support active travel routes.

## **Cairngorm Mountain Masterplan**

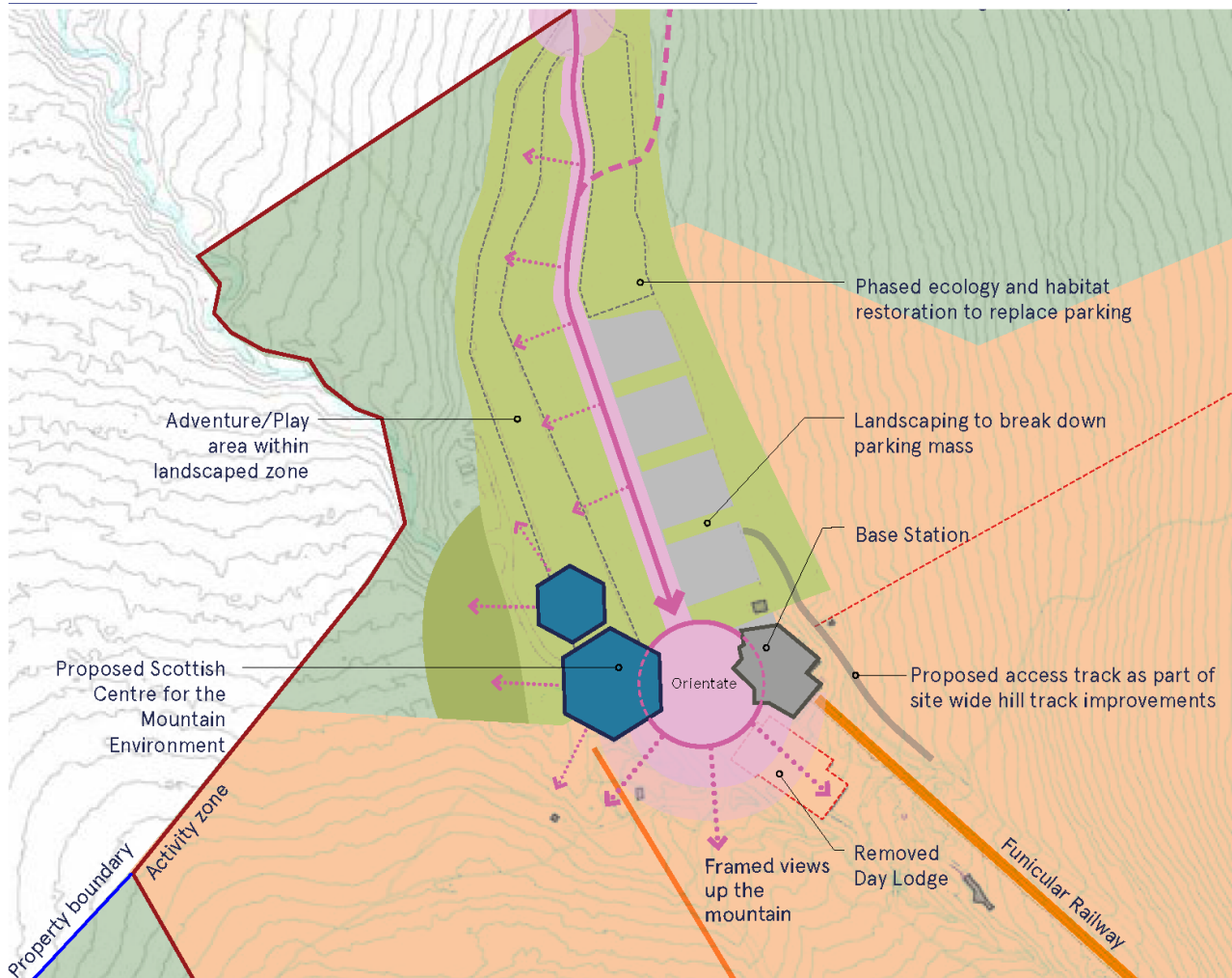
Cairngorm and Glenmore together constitute an iconic destination in the Cairngorms National Park. The area outlined in the Masterplan attracts around 40% of all visitors to the National Park (and is in public ownership on behalf of the people of Scotland). The Cairngorm Estate is owned and managed by Highlands and Islands Enterprise and the National Forest Estate is managed by Forest and Land Scotland. The area is of great importance for recreation and conservation and its long-term management is crucial for the local economy. A masterplan for Cairngorm Mountain was published in 2021 by Highlands and Islands Enterprise. The masterplan aims to harness and optimise Cairngorms potential in a sustainable way for the benefit of present and future generations. The masterplan covers the period of 25 years from 2021, with five yearly reviews.

The Masterplan is an intended framework to enable the Park Authority to consider the impact of future applications not only as individual projects but as contributors to a joined-up vision of Cairngorm's future that is based on targeted and public consultation.

One of the visions guiding principles to: Create year-round inclusive offerings for all users and all groups, supports objective C5 of the National Partnership Plan to stabilise visitor numbers in the peak season, focusing growth during the off-peak. This will also contribute to the economic growth of the National Park and off-season employment within the tourism sector.

The masterplan's 25-year vision also aim to promote active travel and sustainable transport, by promoting the enhancement of local bus services serving the mountain, as well as providing facilities for electric car and bike charging at Cairngorm. The masterplan also sets out a pathway for de-carbonising the mountain facilities to attain net-zero, through the promotion of low-carbon transport and self-sufficiency through renewable energy on-site production. The masterplan includes proposals for development on the site to support its 25-year vision (Figure 5) which can be supported through the next Local Development Plan.





- As the primary entry point for the mountain estate, Cairngorm gateway should create a sense of arrival and drama. Views are framed on the approach by the Base Station and new Scottish Centre for the Mountain Environment. Pausing in this orientation space creates the opportunity for visitors to appreciate all that is available on the mountain.

- Approach (active travel)
- Activity zone
- Property boundary
- Funicular railway
- Proposed new chairlift
- Views
- Proposed trail
- Approach (active travel)
- Arrival and orientation
- Primary activity zone
- Landscaped buffer zone
- Ecology and habitat restoration
- Enhanced wilderness edge

N  
Masterplan zone definitions in section 6.0 p.42  
0 10 20 30m

Figure 5 Cairngorm Mountain 25-year Vision (Highlands and Islands Enterprise, 2021)



## **Core Paths and active travel**

The Park Authority has a duty under the Land Reform (Scotland) Act 2003 to prepare a Core Paths Plan. Section 17 (1) of the Act states that the core paths network should be: '... sufficient for the purpose of giving the public reasonable access throughout the area'.

The Core Paths Plan helps people to enjoy and understand the special qualities of the Cairngorms National Park by identifying outdoor access opportunities. The path network will satisfy the needs of visitors and local people to get around, and link to the wider path network and beyond. The network is made up of a mixture of existing and new paths, which together provide a cohesive system.

The Park Authority will use the Core Paths Plan to priorities resources and path development projects. It will use the Core Paths Plan to support visitor management plans on sensitive sites and it will ensure core paths are waymarked and signposted so that they can be promoted by communities and partners.

Matters relating to active travel in the Cairngorms National Park will be covered in the Sustainable Transport section of the Evidence Report.

## **Community action plans**

There are a number of community action plans within the National Park that identify issues and priorities that relate to tourism and visitor infrastructure.

### **Advie and Cromdale Community Action Plan**

The Action Plan sets out a number of priorities that if actioned could support tourism growth and visitor management including:

High priority items (based on number of votes):

- Better play parks
- Speyside Way - community notice board, more surfacing work, signage at Cromdale end
- Better signage in the village for cycle / walking routes to Grantown / Balmenach / Speyside Way
- Info on visitor attractions (for example Battle of Cromdale, Hill fort, Pipers Stone)
- Signed mountain Bike Trails (Anagach)
- Community web page
- Café in the village hall



Medium priority items:

- Village shop
- Walking trails (for example whisky trail from Cromdale to Balmenach with interpretation)
- Better maintenance of Tom-an-Uird field & viewpoint
- Bike / skate park
- Bus stop sign to prevent parking
- Better maintenance of Braes
- Better use of village noticeboard
- Village campsite – maybe with a village shop / café (near the pavilion).
- Improve picnic area

Low priority items:

- Road sign to indicate three-way traffic lights on crossing bridge
- Repairs cairns on Haughs
- Pony trekking for visitors
- Railway walk and viewpoint improvements (behind Cambrae)

### **Aviemore Community Plan Review 2017**

The Aviemore Action Plan did not highlight visitor infrastructure or tourism as a key issue. However, a number of other sub issues / resident's comments relating to visitor management or tourism were mentioned including:

- Better quality local jobs – diversify economy to avoid reliance on winter sports.
- Sort out Glenmore parking – long lines of cars on the verges.
- Develop the indoor sports centre including an ice rink. The aim is to provide year-round, indoor sporting opportunities for all which would benefit tourism in the settlement. This has been flagged as a potential community led / run project.
- More local festivals and social events for example Hogmanay.
- Develop a village / resort Masterplan to improve visual appearance (outdated high street, better entrances, improve landscaping / planting behind toilets / Vault).
- Better maintenance and signage on Orbital path and at Milton Woods.

Aviemore's Community Action Plan is currently being reviewed and will be published in summer 2024.

### **Ballater & Crathie Community Action Plan 2023**

Theme two of the Action Plan named 'The Visitor Experience' sets out the need to maintain the existing assets, for example, The Old Royal Station, Balmoral Castle, Royal





Lochnagar Distillery and the annual Highland Games to ensure the area 'represents the very best of Royal Deeside'.

One area of improvement noted in the Plan is to improve the signage and means of communication within the village, as it is deemed important that visitors are able to find out about local attractions, events and local services in an easy and clear manner.

The survey carried out as part of the Action Plan creation process suggested improvements in promoting existing events and attractions and expanding what is currently available. In particular, it is thought that additional entertainment events and cultural attractions would be a way of improving the visitor experience, as well as that of the local people. It was thought that the provision of a cultural museum / heritage centre would be popular in the village, and this could be coupled with the already well supported Ballater Local History Group so that the locals can play an active role in creating and maintaining a facility that illustrates Ballater's rich heritage.

Under the theme of 'Recreation and Leisure' the Action Plan also puts forward the community's desire to develop feasibility and funding for a new sports and leisure facility which could serve both local residents and visitors.

### **Blair Atholl Community Action Plan: Looking to 2030**

Under the theme: 'Blair Atholl: an economically thriving community' the plan sets out priorities which will have a bearing on improving tourism and visitor management in the community. They include:

- Improvements and investment in the Blair Atholl railway station.
- Completion of the A9 dualling.
- Refurbishment of Round House & Tilt Hotel.
- Improve visitor information across village and at House of Bruar / Pitlochry, to bring more people into the village to attractions and for things to do.
- Village trail for visitors – develop nature trails and develop wildcat trail.
- More electric vehicle charging points.

### **Boat of Garten Action Plan Review 2028**

The Action Plan sets out a number of priorities that if actioned could support tourism growth and visitor management including:

1. High priority items (based on number of votes):
  - Provision for camping with tents (touring caravans).
  - Integrate and improve off road cycle paths and woodland trails.



- Sort out car parking congestion (especially lower Deshar / Kinchurdy Road & Church Drive).
  - Complete safe footpath between Spey Bridge and Nethy Bridge crossroads
2. Other priorities include:
- Work with railway to keep station looking nice for example paint / plants / flowers.
  - Improve information for locals / visitors for example 'What's On'.
  - Complete Station Square.
  - Crazy golf course.

### **Braemar Community Action Plan**

One of the top priorities in the Braemar Action Plan is Theme One: Visitor Experience. Under this theme the Action Plan addresses the need for better co-ordination of destination marketing initiatives both within the village and also with other nearby attractions such as Glenshee ski centre and mountain biking. More visitor accommodation is also required; to encourage more tourists to extend their stay in the area.

In terms of specific attractions in Braemar there were four major projects underway at the time of the Plan's creation. Plans are in place to maintain and improve the Braemar Castle, develop a Performing Arts Centre at St Margaret's, build a Highland Games Heritage Centre and construct a 5-star Hotel and Spa at the Fife Arms. There are also calls for a significant refurbishment of the Village Hall, a vital community asset.

Under the Active Braemar theme a number of the actions for improvement to trails and footpaths would also benefit tourism and support improvements to visitor infrastructure in the area.

### **Carrbridge Community action Plan: Looking to 2030**

There are a number of priorities in the Community Action Plan that support tourism and visitor infrastructure including:

- Use our natural assets to develop enterprise, business and tourism opportunities.
- Improve support and assistance for local businesses & people trying to get into work – this could include providing accommodation priority for staff working in local businesses.
- Increase opportunities to attract tourism and business to the local area. This priority includes the action to have a designated and supported site for campervans (waste, recycling and electric charging) and the creation of a community-run campsite for campers and tourers.



- Develop a heritage trail and enhance the bridge area (both used/ could be used by tourists).

### **Dalwhinnie Community Action Plan: Looking forward to 2030**

Potential actions from the Dalwhinnie Community Action Plan that would benefit tourism and visitor infrastructure are:

- Find a site for designated campervan / motorhome parking, with relevant support facilities. This would involve consultations between the community and Cairngorms National Park Authority planning team regarding the next Local Development Plan about possible sites and facilities.
- Improvements to local trails, oaths and cycle ways would also benefit tourism and visitor infrastructure in the area.
- Turn off streetlights from midnight till 5am to create a dark skies destination.

### **Dunlain Bridge Community Action Plan Review 2016**

The Action Plan sets out a number of priorities that if actioned could support tourism growth and visitor infrastructure including:

- Safe cycle / footpaths to Grantown, Muckrach, Carrbridge, Broomhil (high priority).
- Look into feasibility of café, visitor centre, shop, toilets (high priority).
- Make more of Roche Moutonnees – landscape behind / remove litter / revisit pond project (high priority).
- Upgrade village website for improved communication for visitors and residents (high priority).
- Repairs to riverside walk (high priority).
- Picnic seats along river to appreciate the bridge (medium priority).
- Public toilets (medium priority).
- Promotion of local walks especially in the woods (medium priority).
- Inverness signposted at road end to bring tourists through the village (low priority).

### **Mount Blair Community Action Plan 2013 – 2018**

The isolated community stated in the Action Plan that transport connection was an issue with no public transport connection to other major cities – which becomes a barrier for visitors wishing to visit. The community reported they struggle to encourage visitors from Blairgowrie and Pitlochry.

The main assets in the area are the natural resources and the Plan highlights the following actions under the priority to develop infrastructure to support outdoor recreation access:

- Develop and promote the local paths network.



- Develop local forests for recreational use.
- Marketing and promotion of the area as a hub for outdoor recreation (lay-bys, picnic areas, signage, leaflets, events).
- Develop infrastructure (including accommodation) to support outdoor recreation.

### **Grantown on Spey Action Plan 2016**

In terms of visitor infrastructure and tourism two main projects are highlighted in the Action Plan namely:

- The restoration and conversion of the former Grantown East Railway Station into a visitor attraction promoting the area's cultural heritage – after a period of operation this site has now closed due to not being financially viable and the site is again vacant at present.
- Secondly the extension of Strathspey Steam Railway to Grantown – this project is still live with work on the Transport and Works (Scotland) (TAWS) application ongoing – more details can be found in the Mobility topic paper.

Grantown on Spey's Community Action Plan is due to be reviewed in 2024.

### **Kincraig Community Action Plan**

In relation to tourism and visitor infrastructure the Community Action Plan sets out a key theme for Public Toilets with the aim of providing public toilets for visitors in the Kincraig area. The action to lobby Scotrail and Network Rail for a railway halt in the village would also be beneficial to supporting tourism and increasing visitors to the area. Other priorities put forward by the community include:

- Re-opening the railway path (medium priority)
- Wider footpath from the Knoll to the Brae medium priority)
- Welcome to Kincraig road signs
- Wildlife interpretation boards.

Kincraig's Community Action Plan is being reviewed and is due to be published in summer 2024.

### **Kingussie Community Action Plan 2018**

The actions in the Action Plan supporting tourism and visitor infrastructure are closely linked to those supporting economic growth and mobility in Kingussie. These include:

- The regeneration of the High Street
- Improvement to transport links and cycle and footpaths.



Other priorities include:

- Develop a campsite for tents and touring caravans (high priority)
- Improve signage in the town (low priority)
- Improve the entrances to the town (low priority)
- Rerun the lantern parade event (low priority).

### **Laggan Community Action Plan: Looking to 2030**

The Community Plan sets out a number of priorities aimed at delivering an economically thriving community which include the following items relating to tourism and visitor infrastructure:

- Investment in serviced site for campervans, motorhomes, tents
- Make more of a 'Welcome to Laggan'
- Expansion of mountain biking facilities at Wolftrax
- Develop a 'Business Development & Marketing Plan' to promote Laggan – which can deliver visitor information and promote Laggan Heritage as an attraction for visitors to learn about the area.

A further priority brought forward by the community was to create a community shop for basics, linked with the food shed (suggested location Wolftrax), to serve the needs of visitors and community.

### **Nethy Bridge Community Action Plan: Looking forward to 2030**

The Action Plan sets out a number of priorities under the 'economically thriving community' theme one of which is directly applicable to tourism and visitor infrastructure. The priority to investigate options for taking more assets into community ownership - community owned / managed touring campsite with service facilities for tents, campervans and motorhomes.

Other changes in relation to visitor infrastructure the community would like to see by 2030 include:

- Support our businesses by shopping local: to keep the shops, café, hotel in the village and encourage the re-introduction of a Post Office.
- Installing ATM facility.

The Plan also supports the improvements in local paths, cycle ways and the Speyside way all of which will be beneficial in promoting the trails to visitors.



### **Newtonmore Community Action Plan: Looking forward to 2030**

The Plan includes the priority to increase opportunities to attract tourism and business to area which includes the action to improve signage of local attraction including village entrances through:

- Welcome signs to the village – make a statement.
- Vibrant signs with Gaelic name and maybe flowerpots for a positive village feel.
- Have a designated and supported site for campervans (waste, recycling and electric charging) Larger campsite for campers and tourers.
- Include electric hook up and other facilities for example bin, water, grey and brown water waste.

Further suggestions for improvement in the Plan include:

- Encourage a more vibrant, attractive Main Street: more shops, flowers, places to eat, local produce shop, local charity shop, re-route heavy good vehicles (HGVs) to use Coffin Road onto A9, manage Main Street congestion in the summertime.
- Cycling: better connections of cycle routes.
- Re-route Wildcat Trail from top of Calder Path north towards Allt Laraidh (link to Kingussie) / liaise with local people and maintain the Wildcat Experience, including surface path at golf course section (much loved by locals and visitors).
- Public toilets – to be maintained / managed / better sign posted / accessible similar to Kingussie.
- Create a direct link from village to the Highland Folk Museum.
- Cycle hire including electric bikes.
- Improve golf course.

### **Strathdon Area Community Action Plan May 2016**

Theme three of the Action Plan specifically addresses local attractions and tourism. In the context of the local economy, spending by tourists and other visitors is recognised as a means of supporting and sustaining essential local services and social facilities in the area. These include the Bellabeg Spar Shop and Post Office, Goodbrand and Ross Café and Gift Shop, the two local hotels and the Lecht Ski Centre, as well as individual providers of tourist accommodation. People in the service industry, and other residents, consider that Donside has been given little support in promoting tourism compared with Deeside and other areas in the Cairngorms National Park.

Community participants demonstrated interest in exploring heritage projects, and in looking at ways to ensure that local hotels, other accommodation and eating places are attractive and accessible to visitors and residents. In particular, there were suggestions



to improve and develop pathways, including by reinstating bridges and developing more ambitious projects such as a 'Donside Way'.

Specific actions outlined in the Action Plan under the theme of local attractions and tourism include:

- Promoting the area as a visitor destination to raise the profile of Upper Donside as a tourist destination.
- Develop and support projects which protect and / or enhance the heritage of the area.
- Promote and improve signage for pathways for visitor and local use.
- Look at ways of making the local service industry more sustainable, improve quality and offer support for emerging new visitor businesses.

## **Baseline of tourism matters**

Spending by visitors in Scotland generates approximately £11.5 billion of economic activity for the wider Scottish supply chain. It directly contributes around £6 billion to Scottish gross domestic product, and 8.5% of all businesses in Scotland are related to tourism<sup>2</sup>.

The Cairngorms National Park is the UK's largest National Park located in the Scottish Highlands and offers a wide variety of visitor attractions including; water sports, snowsports, wildlife watching, and some incredible high and low level walking and cycling routes.

## **Visitor survey**

Visitor surveys have been carried out within the National Park in 2003 / 2004, 2009 / 2010, 2014 / 2015 and 2019 / 2020. The most recent survey provides data for the 11 months from May 2019 to March 2020. In total 2,262 people participated in the survey (2,191 visitors and 71 residents) across 40 sampling points in the National Park. A summary of the information from the 2019 / 2020 survey is provided here.

## **Demographics**

The majority of visitors to the National Park were full-time working people 55% and retired people 24%. 97% of the visitors regarded themselves as white (ethnicity). 9% of

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<sup>2</sup> <https://www.parliament.scot/chamber-and-committees/official-report/search-what-was-said-in-parliament/chamber-and-committees/official-report/what-was-said-in-parliament/meeting-of-parliament-22-03-2022?meeting=13658&iob=123961>



visitors in 2019 / 2020 reported having a disability (of which 51% said it was a mobility related health problem).

### Reasons for visit

Figure 6 shows the reasons people visit the Cairngorms area as recorded by the 2019 / 2020 Visitor Survey. The largest reported reason for visiting Cairngorms National Park was to enjoy the beautiful scenery (52%). Other key reasons for visiting included walking (25%), for peace and quiet (25%), sightseeing (22%), visiting attractions (21%), wildlife / bird watching (18%) and hillwalking (17%).

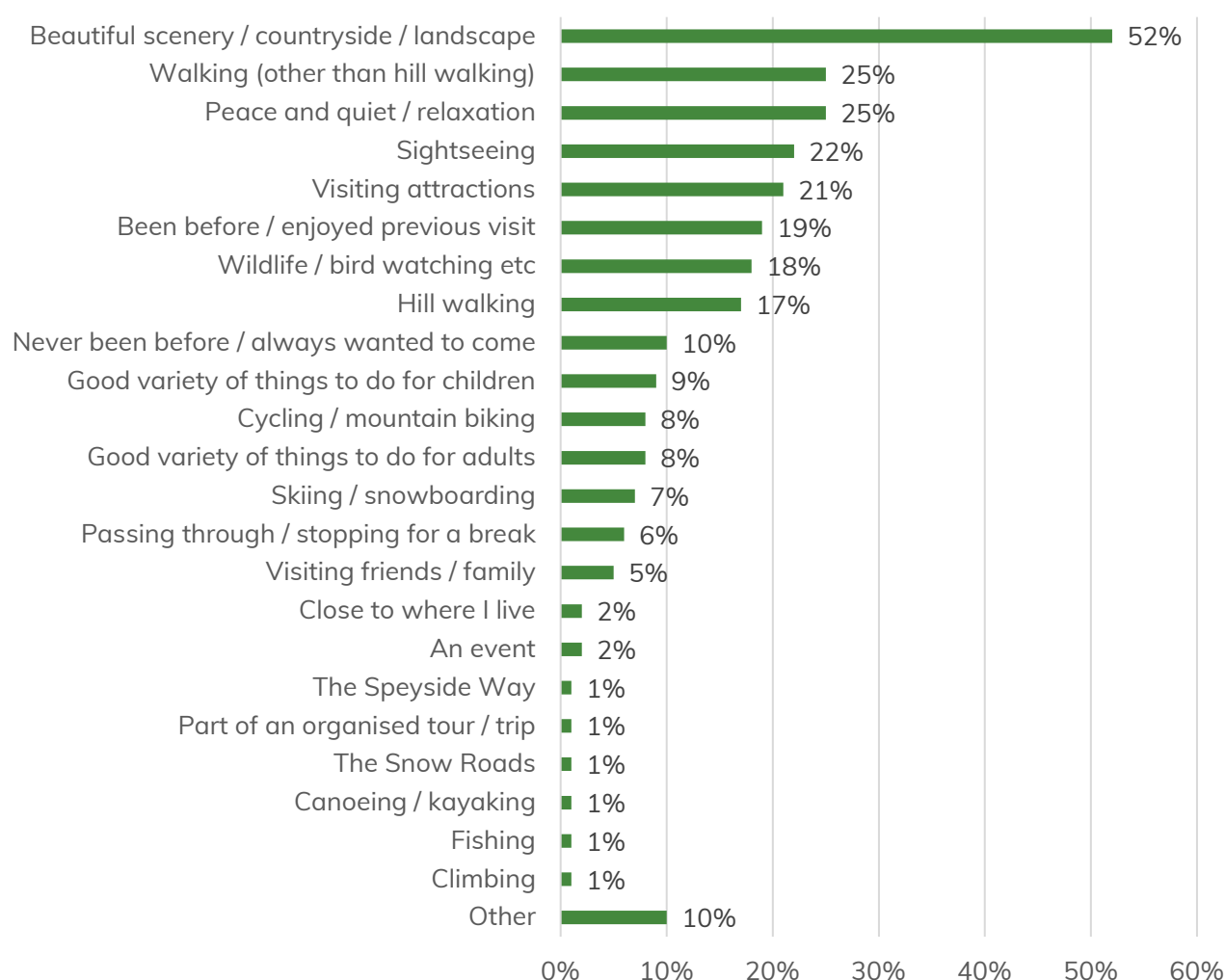


Figure 6 Reasons given for visiting the Cairngorms National Park, Visitor Survey 2019 / 2020.

A good variety of things to do for children was a key motivation for Scotland visitors (12%). As we would expect, motivations for visiting in winter differed from the other seasons. Winter visitors were more likely to be motivated by snow sports (42%) and less likely to mention factors such as scenery (27%), walking (13%), sightseeing (10%) and peace and quiet (14%) than visitors in other seasons.





Over half of respondents (55%) who were aware of the National Park status of the Cairngorms area stated that this was key to their decision to visit here, with an even split between those describing it as 'very' and 'quite' important.

### Accommodation

Figure 7 shows the accommodation used by overnight visitors staying in the National Park. The majority of visitors staying in the National Park stayed in hotels (25%) and rented self-catering houses / cottages / chalets (23%). However, when combining all self-catering options, including time shares, 'homestay' accommodation and second homes, the total proportion is 32%, making it the top accommodation type.

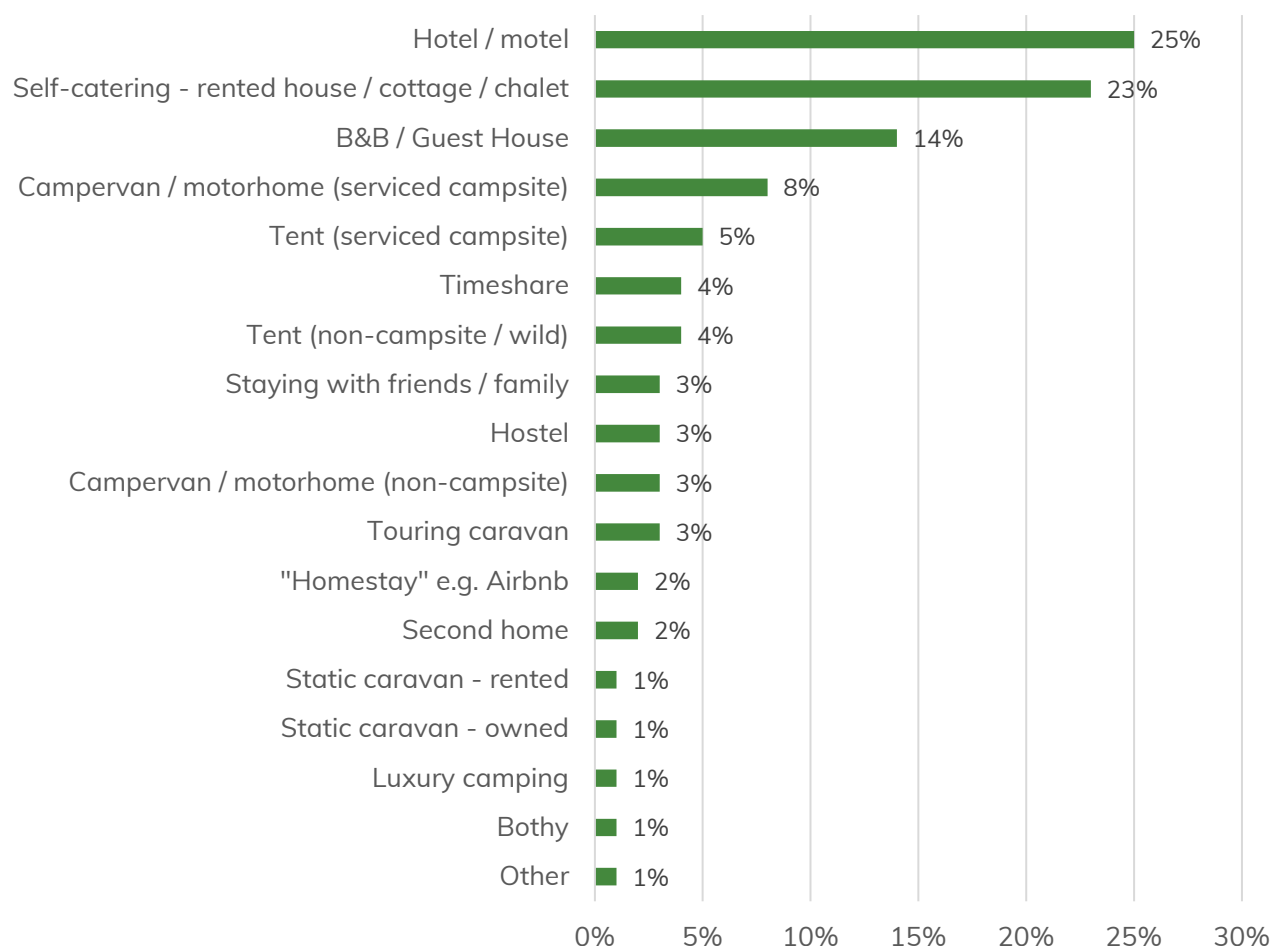


Figure 7 Accommodation used in the Cairngorms National Park for overnight visitors. Visitor Survey 2019 / 2020.

Looking at the changes in net codes (self-catering, hotel / motel, camping / caravan and guest house / bed and breakfast) between 2014 – 2015 and 2019 – 2020 the biggest change is in camping and caravan accommodation which has increased from 18% to



24%. Self-catering was stable at 32%, Hotel / motel stays decreased from 26% to 25% and Guest house / bed and breakfast stays decreased from 16% to 14%.

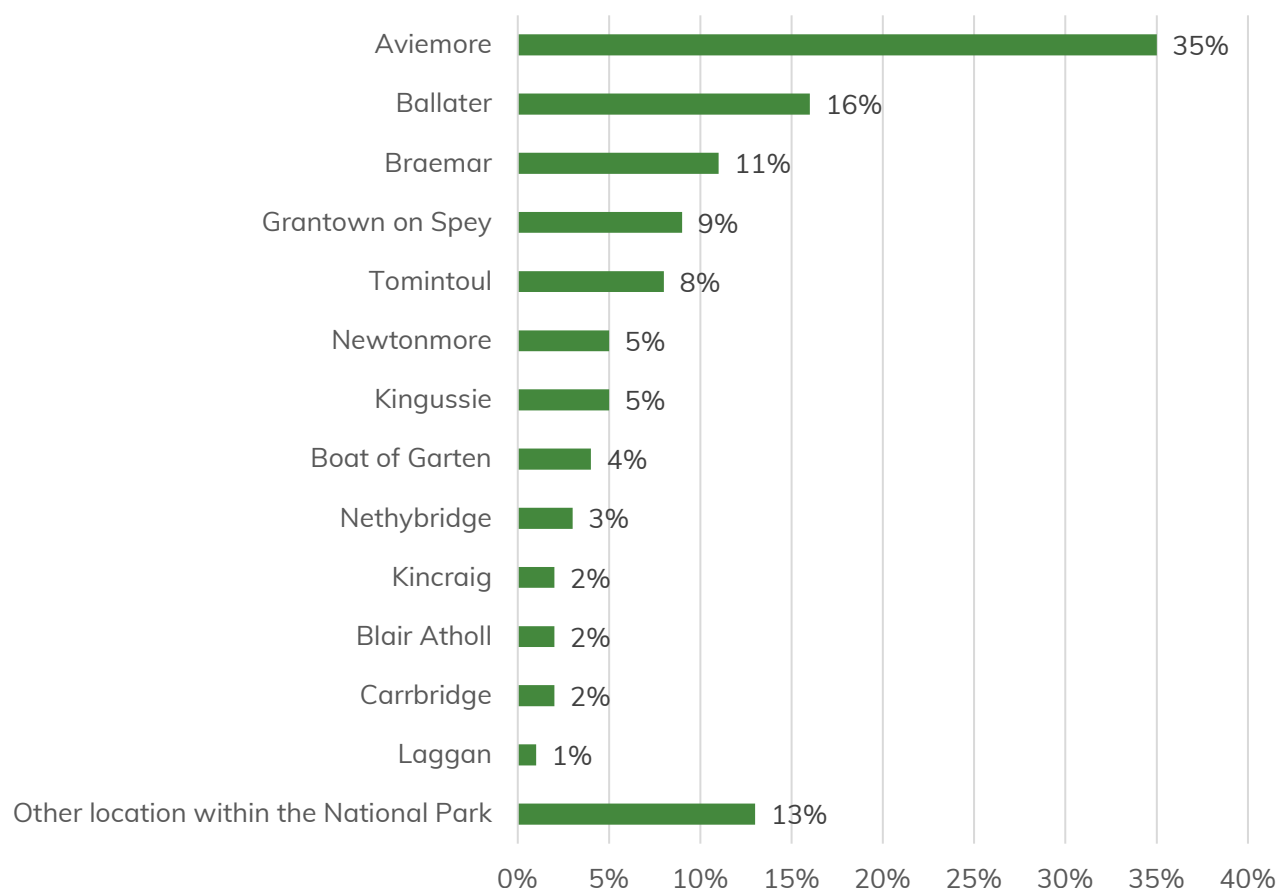


Figure 8 Location where overnight visitors stay in the Cairngorms National Park. Visitor Survey 2019 / 2020.

Aviemore was the most popular accommodation location in the Cairngorms National Park with over one third of all overnight visitors staying there (Figure 8). This was also the case in winter when Aviemore was also the most popular place to stay in winter with 54% of respondents staying overnight there. Many of the places mentioned by visitors correspond to the main A9 route along the western edge of the National Park; however, locations on the central and eastern side of the National Park were also popular, with 16% staying in Ballater and 11% in Braemar. The survey also asked visitors if a tourist tax on accommodation would affect their decision to visit the National Park. 82% of visitors said it would not.

## Travel

Figure 9 shows the recorded visitor method of travel to the Cairngorms National Park. 83% of visitors reported arriving to the National Park by car (65% by private car and 18% by hired car). Only 3% of those travelling by car reported that it was an electric or



hybrid vehicle (Figure 10). 8% of visitors arrived by motorhomes and campervans and 4% travelled by train. A small but significant proportion of people travelling by train (14%) reported that they used the sleeper service.

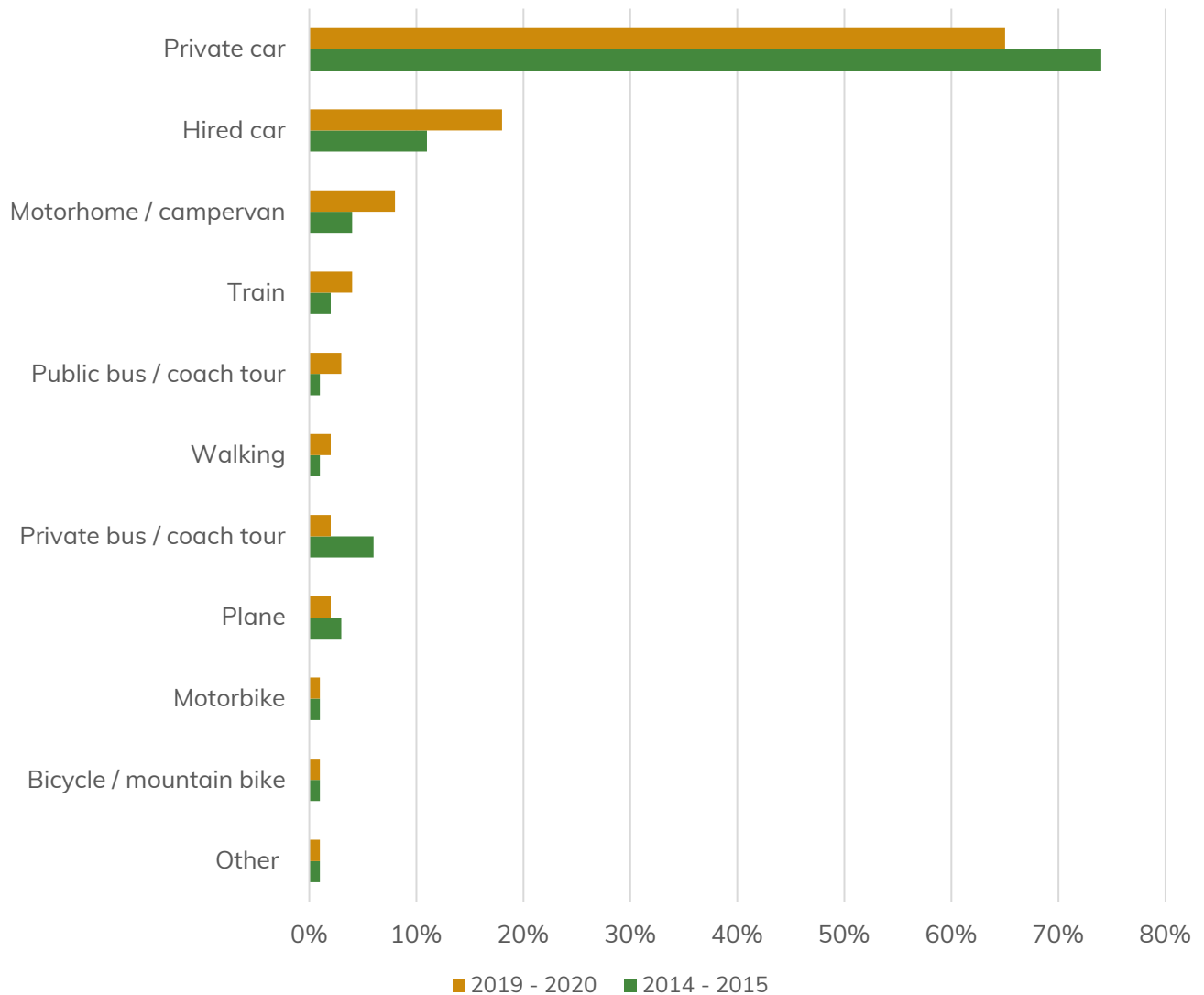


Figure 9 Mode of visitor travel to the Cairngorms National Park. Visitor Survey 2019 / 2020.

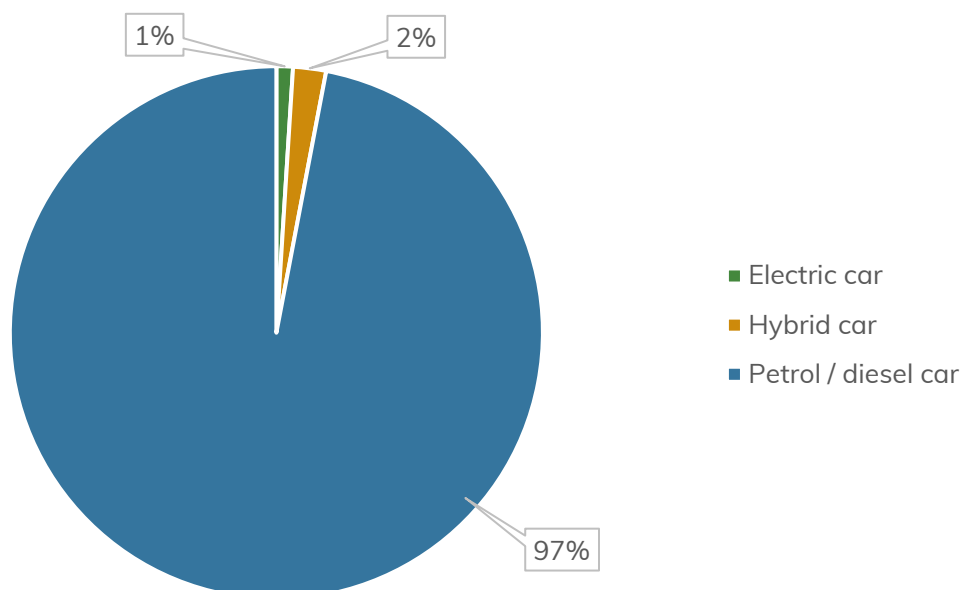


Figure 10 Breakdown of type of fuel used by those that travelled to the National Park by car (1,881 people). Visitor Survey 2019 / 2020.

Younger respondents were more likely to travel by public transport than those in the older age groups, for example, by train (mentioned by 8% of 16 to 34 year olds) or by bus (7%).

The majority of people (96%) visiting the Cairngorms National Park reported they used their preferred mode of transport. Only 4% of respondents reported that they would have preferred to travel around the National Park by a different mode of transport. Of those who would have preferred a different mode of transport, most were seeking public transport options; bus (29%), train (18%), or active travel options, such as cycling (16%) or walking (10%).

Within the Cairngorms National Park the majority of respondents (65%) stated they used their private car in 2019 / 2020 this had decreased from 74% in 2014 / 2015. (Figure 11). Visitors moving around the National Park by hired car increased from 11% in 2014 / 2015 to 18% in 2019 / 2020. Walking around the National Park also increased from 15% in 2014 / 2015 to 24% 2019 / 2020. Visitors moving around in motorhomes and caravans doubled from 4% in 2014 / 2015 to 8% 2019 / 2020. People travelling around on bikes decreased from 7% in 2014 / 2015 to 5% in 2019 / 2020. Visitors moving around by public bus increased from 2% in 2014 / 2015 to 4% in 2019 / 2020.

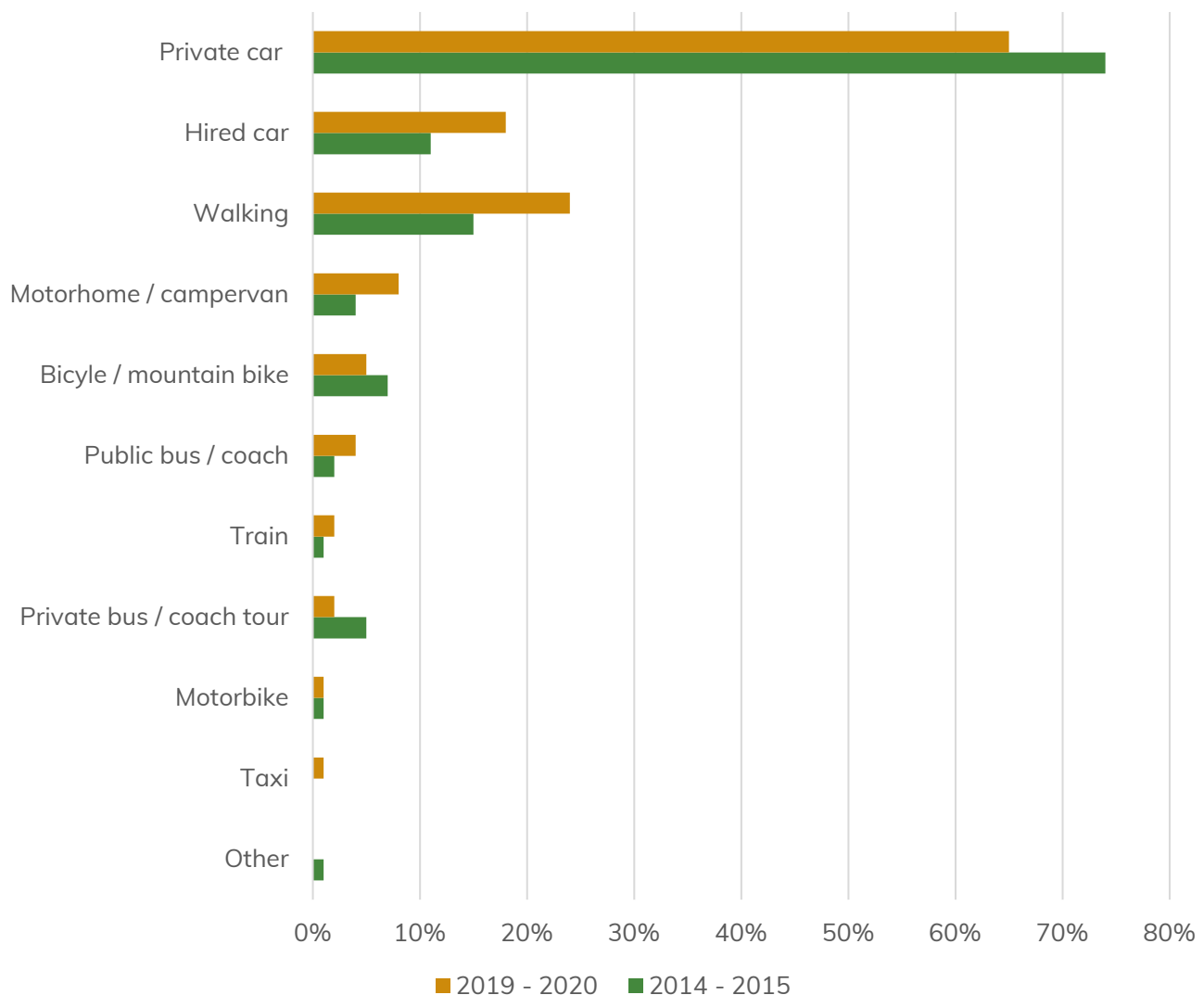


Figure 11 Mode of transport used by visitors within the National Park. Visitor Survey 2019 / 2020.

Although more respondents were positive about public transport (47%) than negative (31%) there was a significant number of respondents who rated this service negatively (16%). Satisfaction ratings for public transport have decreased significantly since 2014/15 when two thirds considered it good or very good.

Matters relating to transport are covered in the sustainable transport section of the Evidence Report.

### Attractions

The majority of respondents (78%) visited at least one attraction during their trip to Cairngorms National Park.



Figure 12 shows the attractions visitors went to during their stay in the National Park. The most popular attractions (close to Aviemore) were Loch Morlich (23%), Cairngorm Mountain Ski Centre (15%), Loch an Eilein (16%), Rothiemurchus (11%). Other notable attractions were Balmoral Castle (13%) and Braemar Castle (8%).

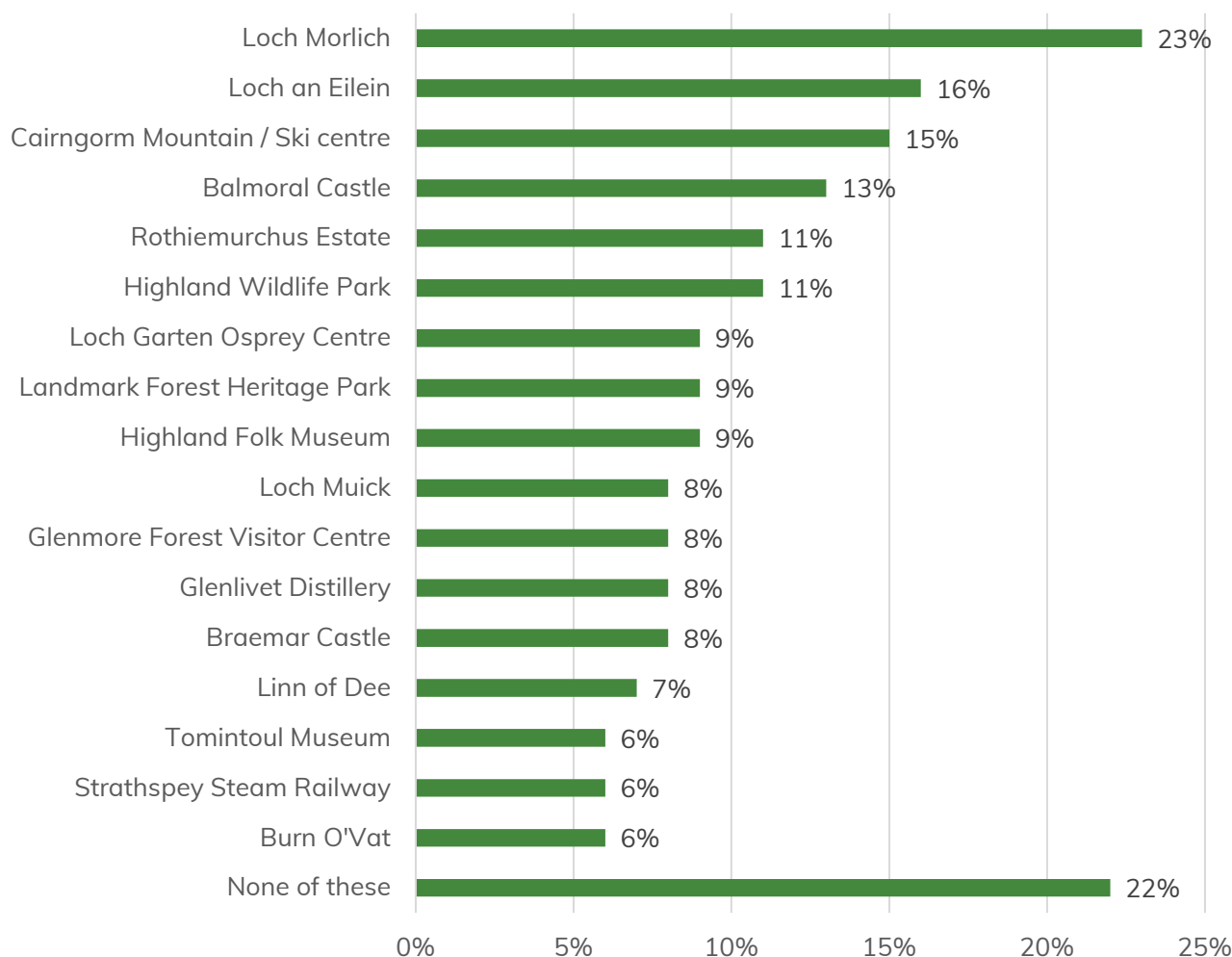


Figure 12 Top attractions within the National Park. Cairngorms National Park Visitor Survey 2019 / 2020.

Wildlife attractions, such as the Highland Wildlife Park (11%) and Loch Garten Osprey Centre (9%) also featured highly.

### Facilities

The survey data show that the majority of visitors rated the condition of paths and tracks, signage, car parks and public toilets as good or very good. There have been improvements in people's responses when asked about facilities since 2014 / 2015, with higher proportions rating them as very good in 2019 / 2020.



## Digital connectivity

Figure 13 shows that in 2019- 2020 less than half of respondents (47%) gave a positive (good or very good) rating for mobile phone reception, with 22% rating this negatively (poor or very poor). The mean score for mobile phone reception reported in the Visitor Survey increased from 3.09 in 2014 / 2015 to 3.23 in 2019 / 2020 (the mean score is calculated whereby 1 is very poor and 5 is very good) .Very similarly, 46% gave a positive rating for Wi-Fi access, while 24% rated it negatively (Figure 14). The mean score for visitor ratings of Wi-Fi also increased from 3.06 in 2014 / 2015 to 3.08 in 2019 / 2020. Further information on digital infrastructure in the National Park are covered in the digital infrastructure section of the Evidence Report.

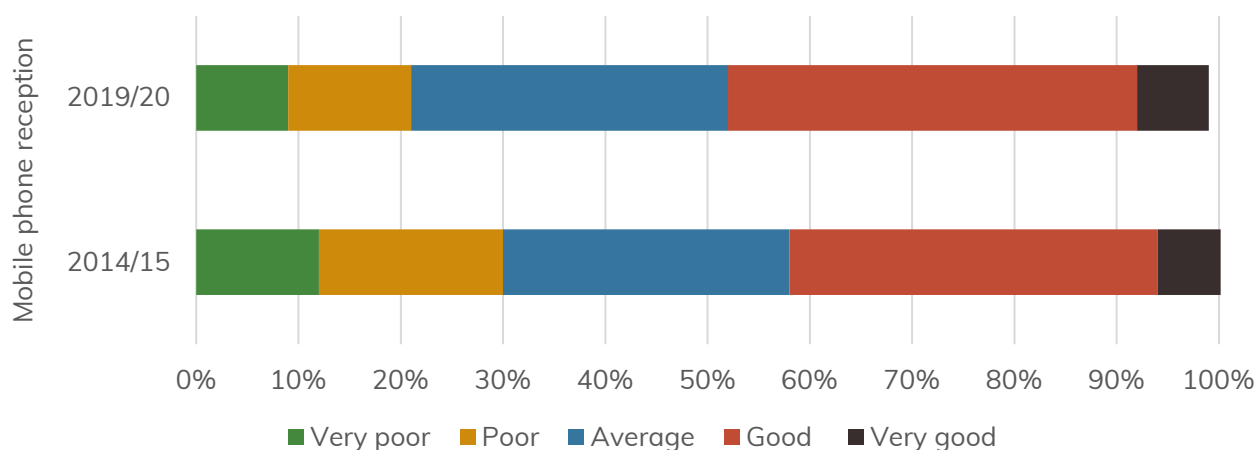


Figure 13 Rating of the Mobile phone reception in the Cairngorms National Park by visitors in 2014 / 2015 and 2019 / 2020. Cairngorms National Park Visitor Survey 2019 / 2020<sup>3</sup>.

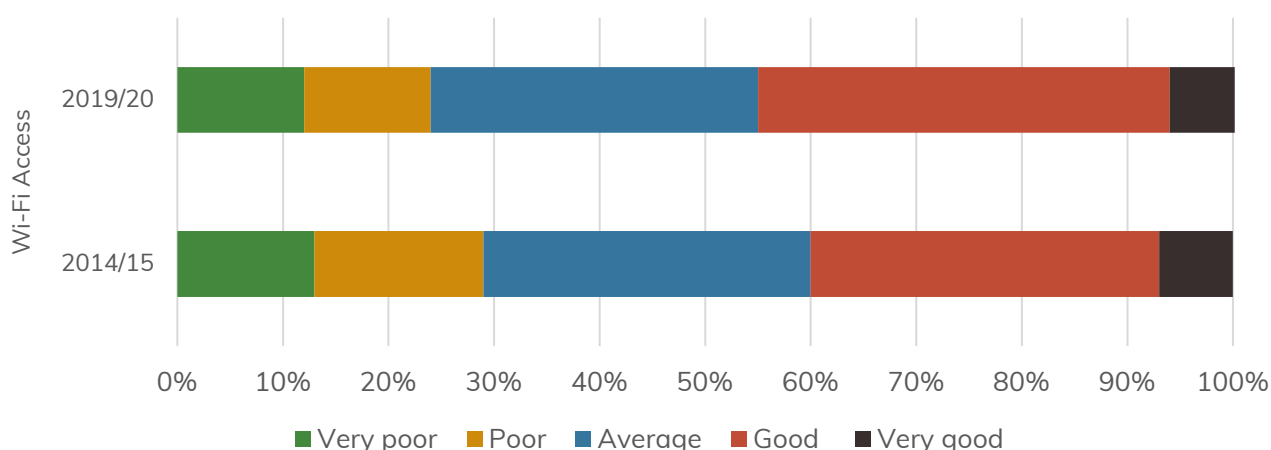


Figure 14 Rating of the Wi-Fi access in the Cairngorms National Park by visitors in 2014 / 2015 and 2019 / 2020. Cairngorms National Park Visitor Survey 2019 / 2020.

<sup>3</sup> Figures may not sum due to rounding



## Public transport

Figure 15 shows the visitor rating of the public transport in the Cairngorms National Park. In 2019 / 2020 47% of respondents rated it as good or very good, with 31% rating it as poor or very poor. The mean score for public transport decreased from 3.69 in 2014 / 2015 to 3.02 in 2019 / 2020.

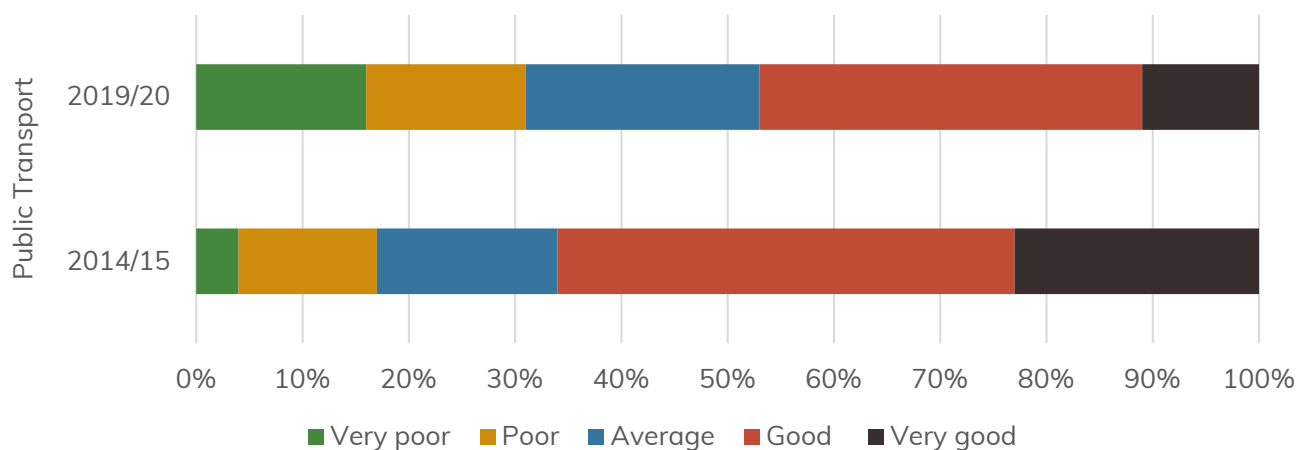


Figure 15 Rating of the public transport in the Cairngorms National Park by visitors in 2014 / 2015 and 2019 / 2020. Cairngorms National Park Visitor Survey 2019 / 2020.

## Evaluation of facilities

Respondents of the Visitor Survey were asked to rate a number of facilities and amenities in Cairngorms National Park (Figure 16, Figure 17, Figure 18 and Figure 19). In 2019 / 2020 survey 2,152 people participated, slightly less than the 2,220 people participating in the 2014 / 2015 survey. The data shown here excludes those who did not use the facilities, i.e. those who responded 'not used / applicable'. The data show that the majority rated the condition of paths and tracks, signage, car parks and public toilets as good or very good.

Paths and tracks, signage and car parks were rated as good or very good by a similar proportion of respondents, although paths and tracks received the highest rating overall. There have been improvements in the scores for these facilities since 2014 / 2015, with higher proportions rating them as very good in 2019 / 2020.

The mean scores (whereby one is very poor and five is very good) all increased for questions around the conditions of paths and tracks, signage, and provision of car parks from 2014 / 2015 to 2019 / 2020. In 2019 / 2020 Visitors scored the condition of paths and tracks 4.3 out of 5 up from 4.23 in 2014 / 2015 (Figure 16). Visitors scored the provision of signposts and signage a mean score of 4.20 in 2019 / 2020 up from 4.13 in 2014 / 2015 (Figure 17). The provision of car parks received a modest increase in mean score up from 4.18 in 2014 / 2015 to 4.19 in 2019 / 2020 (Figure 18).





In 2019 / 2020, 67% considered the availability of public toilets as good / very good overall, with only 18% rating this as very good. There has been a significant decrease in satisfaction with public toilets compared to 2014 / 2015 when 86% rated it positively. The mean score given by visitor rating the availability of public toilets reduced from 4.03 out of five in 2014 / 2015 to 3.70 in 2019 / 2020.

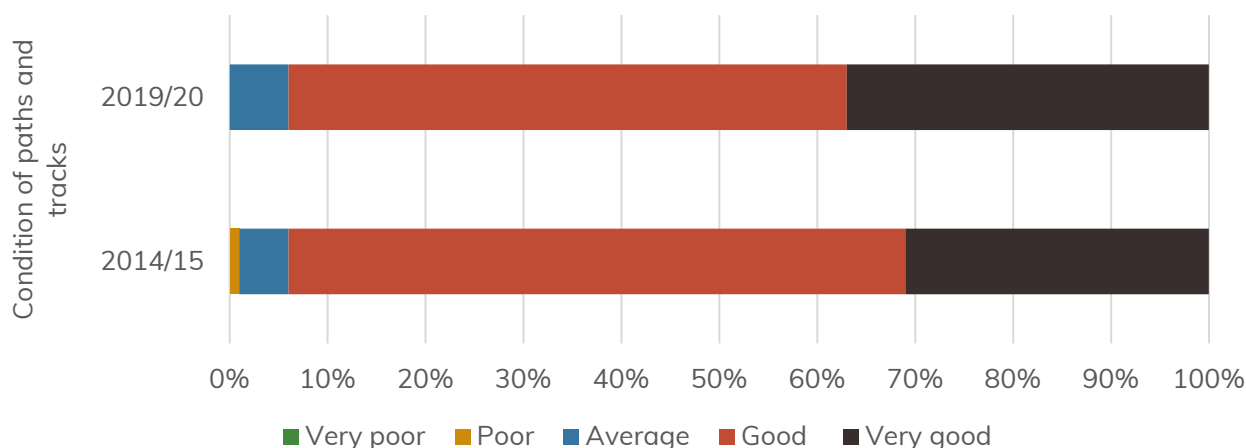


Figure 16 Rating of the condition of paths and tracks in the Cairngorms National Park by visitors in 2014 / 2015 and 2019 / 2020. Cairngorms National Park Visitor Survey 2019 / 2020.

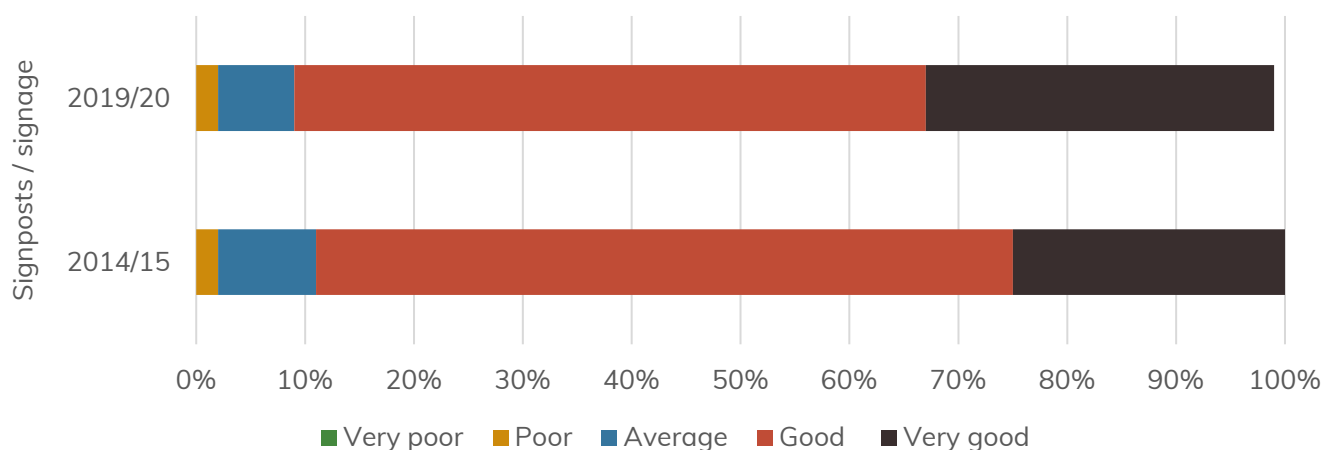


Figure 17 Rating of the signposts and signage in the Cairngorms National Park by visitors in 2014 / 2015 and 2019 / 2020. Cairngorms National Park Visitor Survey 2019 / 2020<sup>4</sup>.

<sup>4</sup> Figures may not sum due to rounding.

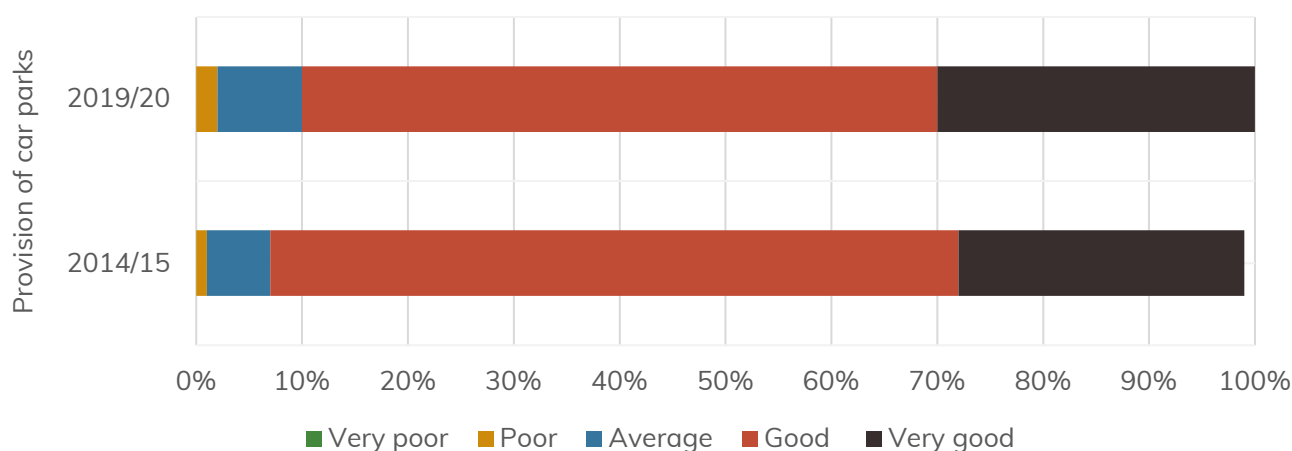


Figure 18 Rating of the provision of car parks in the Cairngorms National Park by visitors in 2014 / 2015 and 2019 / 2020. Cairngorms National Park Visitor Survey 2019 / 2020<sup>5</sup>.

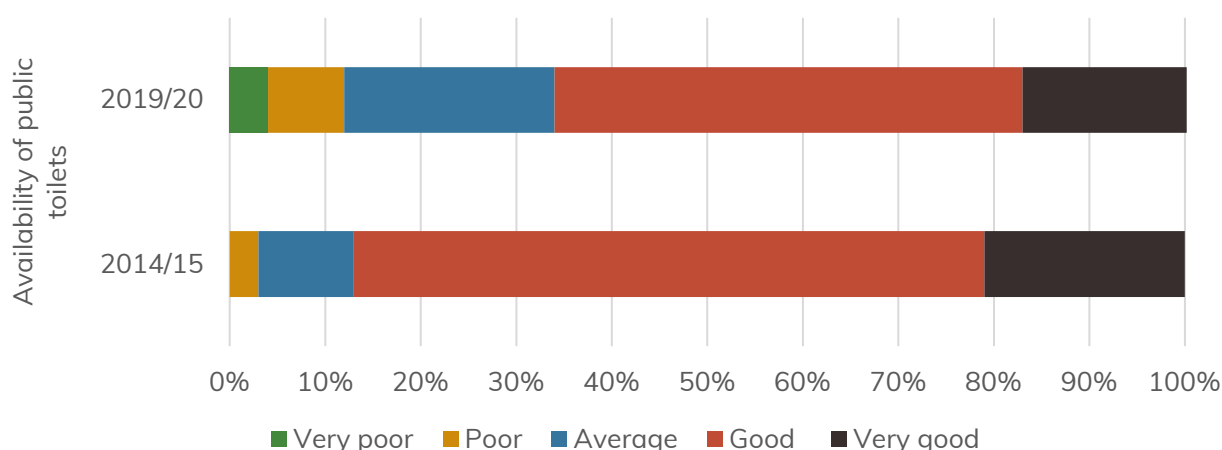


Figure 19 Rating of the availability of the public toilets in the Cairngorms National Park by visitors in 2014 / 2015 and 2019 / 2020. Cairngorms National Park Visitor Survey 2019 / 2020.

Respondents were also asked if anything could be improved to make their visit to the Cairngorms National Park more enjoyable. In this section no one suggestion stood out. The following recommendations were made:

- More public toilets (9%, which was the most requested<sup>6</sup>)
- Better public transport (5%)
- Better signage (5%)
- More parking (3%)
- A greater choice of restaurants / cafes (3%)
- An improvement in the existing public toilets (3%)

<sup>5</sup> Figures may not sum due to rounding.

<sup>6</sup> 9% also stated they would like improvements to the weather/ snow, something outwith the control of the National Park Authority.



- An improvement in the visitor information (3%)

The most recent Visitor Survey (2019 / 2020) raised a number of recommendations from visitors for improvement including:

- More public toilets, as well as improvements to existing facilities
- Better public transport
- Better signage
- More parking
- A greater choice of restaurants / cafes
- An improvement in the visitor information

## Visitor economy

The Cairngorms National Park Authority receives an annual report generated using STEAM<sup>7</sup> to report on tourism specific economic impact modelling. STEAM data from 2020 and 2021 was affected directly by the Covid-19 Pandemic lockdowns and indirectly by resulting changes in visitor behaviour post lockdown. As a result, the figures for those years are likely to underestimate actual visitor numbers.

In 2023, the Cairngorms National Park received approximately 2.1m visitors, representing a 24.2% increase from 2022. This represents a third year of growth following the decline recorded in 2020 due to the Covid-19 Pandemic. In 2021 visitor numbers increased 90.6% from the low numbers recorded in 2020 (which was a decrease on the 2019 figures of -73.0%). In 2022 they continued to increase from 1.1m in 2021 to 1.7m in 2022 (representing an increase of 62.7%).

Pre-pandemic, in 2019, the Cairngorms National Park received 2.067m visitors which has now been surpassed by the 2023 visitor number figures (Figure 20).

Figure 20 Annual visitor numbers (millions / year) to the Cairngorms National Park 2012 - 2023 (Cairngorms National Park 2023 STEAM report, 2024).

Between 2012 and 2023 the total average annual growth in visitor numbers was 3.3%, however this has not been uniformly seen in all months or seasons across the year. During this period the highest increase in visitor numbers has been during

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<sup>7</sup> Owned and operated by Global Tourism Solutions (UK) Ltd.



November and December which have seen reported visitor numbers increase by 74.7% and 85.2% respectively.

Between 2022 and 2023 the Cairngorms National Park has witnessed an increase in visitor numbers in 32.8% in quarter one, 23.8% in quarter two, 23.3% in quarter three and 19.8% in quarter four. These figures differ significantly from the previous years post Covid, which may signal growth rates and visitor numbers are reflecting the stability and trajectory seen before the Pandemic.

The Cairngorms National Park experiences seasonal variations in visitor numbers affecting the monthly number of people employed in this sector throughout the year.

Figure 21 shows the monthly visitor numbers from January 2018 to December 2023. In 2023 August received the most visitors with approximately 304,000 visitors. The least busy month in 2023 was January with approximately 101,000 visitors. The largest percentage increase in monthly visitor numbers during this period has been in January when in 2018 there were approximately 70,000 visitors, which in January 2023 increased to approximately 101,000 visitors representing a 44.3% increase. September saw the second largest increase in monthly visitor numbers from 2018 to 2023 with an increase of 30.8% from approximately 182,000 to 238,000 visitors.

July and October saw relatively little change in terms of visitor numbers, with percentage changes of -2.4% and 5.4% respectively. The largest reported decrease from 2018 to 2023 was in May when numbers fell from 228,000 visitors in 2018 to 212,000 in 2023 (representing a 7.0% decrease). It is worth noting that pre-pandemic in 2019 in June there were 232,000 visitors. This may indicate a changing pattern in domestic vacation patterns or that behaviour has not fully returned to re-pandemic patterns, which subsequent years data should be able to show

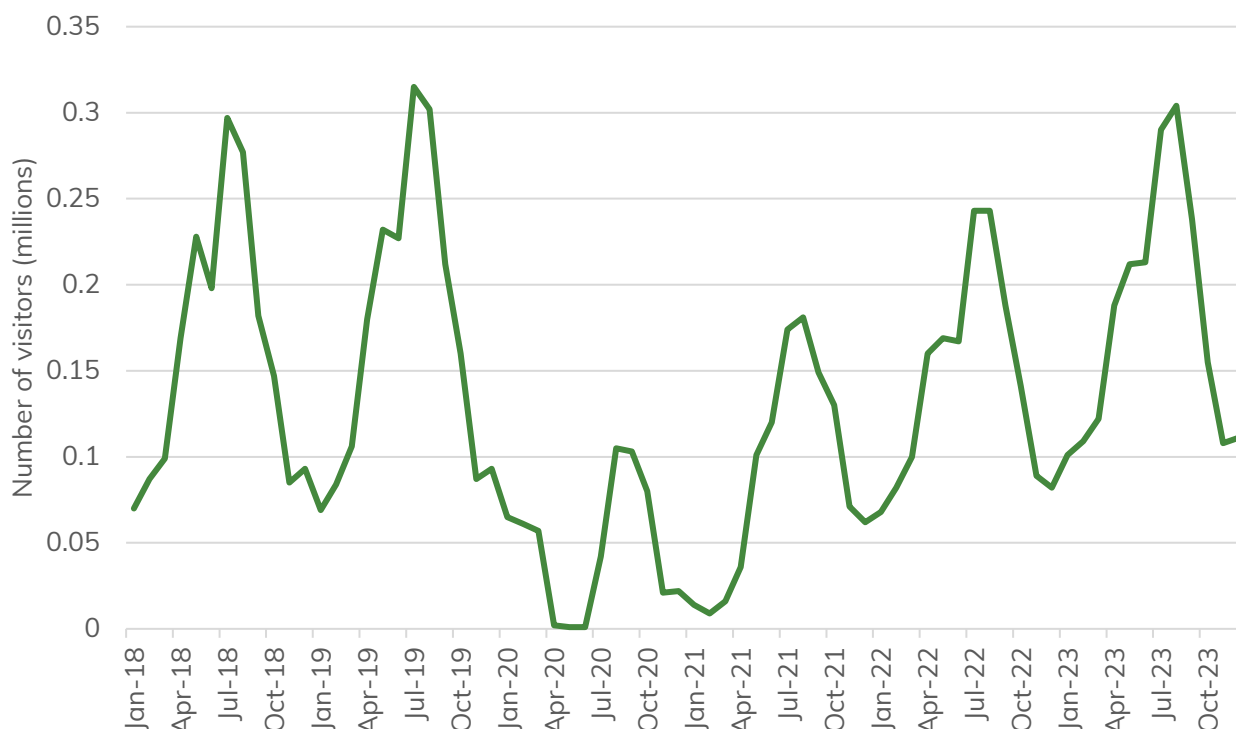


Figure 21 Monthly visitor numbers, January 2018 – December 2023 (Cairngorms National Park 2023 STEAM report, 2024)

## Economic impact of tourism

In 2023 the economic impact of tourism in the Cairngorms National Park was reported at £419.33m (Figure 22) representing an increase of 18.7% from 2022 (£353.38m) and 35.9% higher than the pre-pandemic figures for 2019 (£308.54m). This represents a strong recovery in terms of economic impact since the Covid-19 Pandemic.

The Covid-19 Pandemic had significant negative effects (-65.4%) on the economic impact of tourism in the Cairngorms National Park in 2020 (Figure 22 and Figure 23) with a reduction of £201.94m compared to the previous year. In 2019 the economic impact of tourism in the Cairngorms National Park was reported to be £308.54m. There was strong economic growth up to 2019, with an average increase of +7.5% annually from 2009 to 2019 representing an increase of +74.7% change for the period. In 2019 the highest growth was reported at +14.2% over twice the annual average and over 2% higher than in 2018 (+12.1% increase).

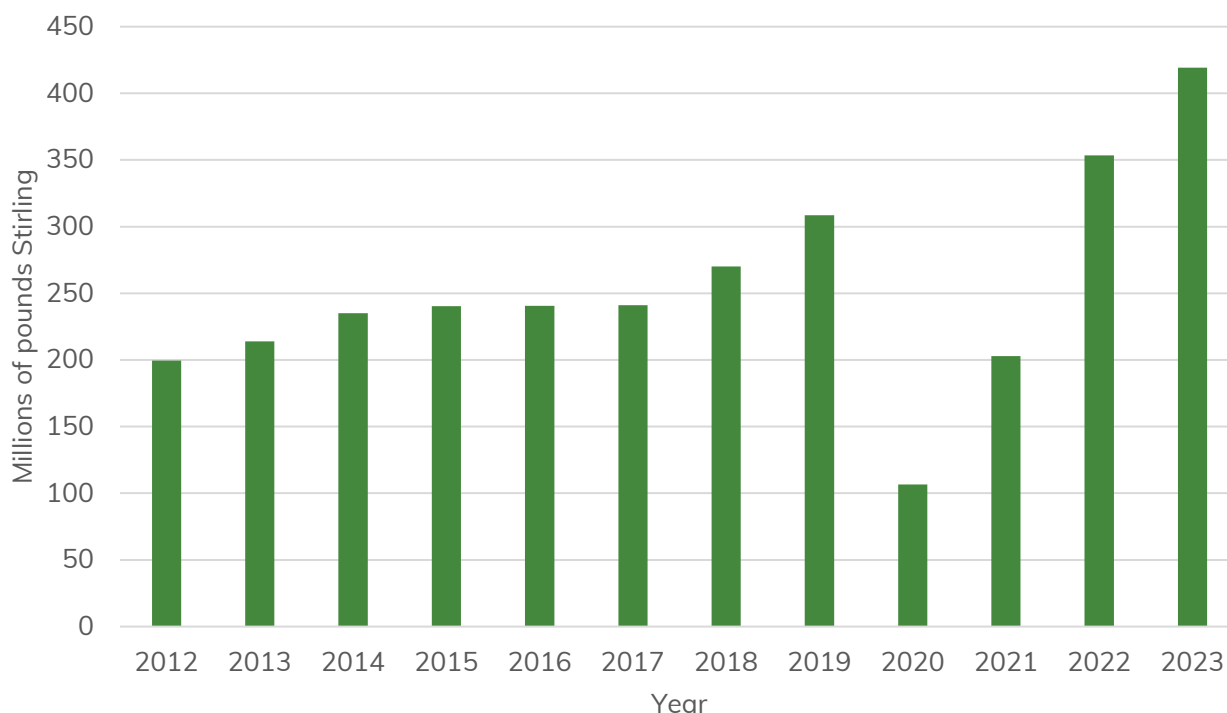


Figure 22 Annual economic impact from tourism 2012 – 2023 (£M) (Cairngorms National Park 2023 STEAM report, 2024).

Very little growth (approximately 0.04% increase) was recorded in 2016 in terms of economic impact of tourism in the National Park which reflects figures for the International Domestic Overnight Visitor spend for Scotland, from data published in the Tourism Report<sup>8</sup> produced by Scottish Government in 2018. It reported a marked reduction in the overnight visitor spend by domestic visitors in 2016.

<sup>8</sup> <https://www.gov.scot/publications/tourism-scotland-economic-contribution-sector/pages/3/>

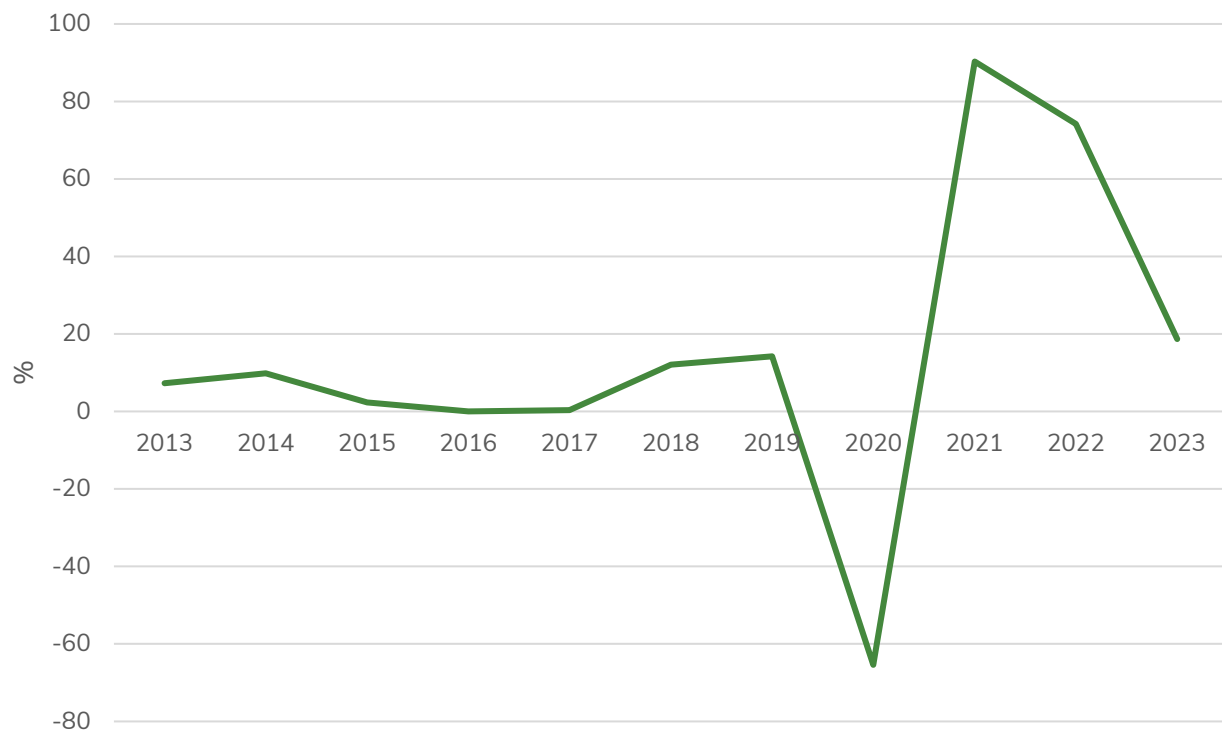


Figure 23 Annual percentage change in economic impact 2013 – 2023 (Cairngorms National Park 2023 STEAM report, 2024).

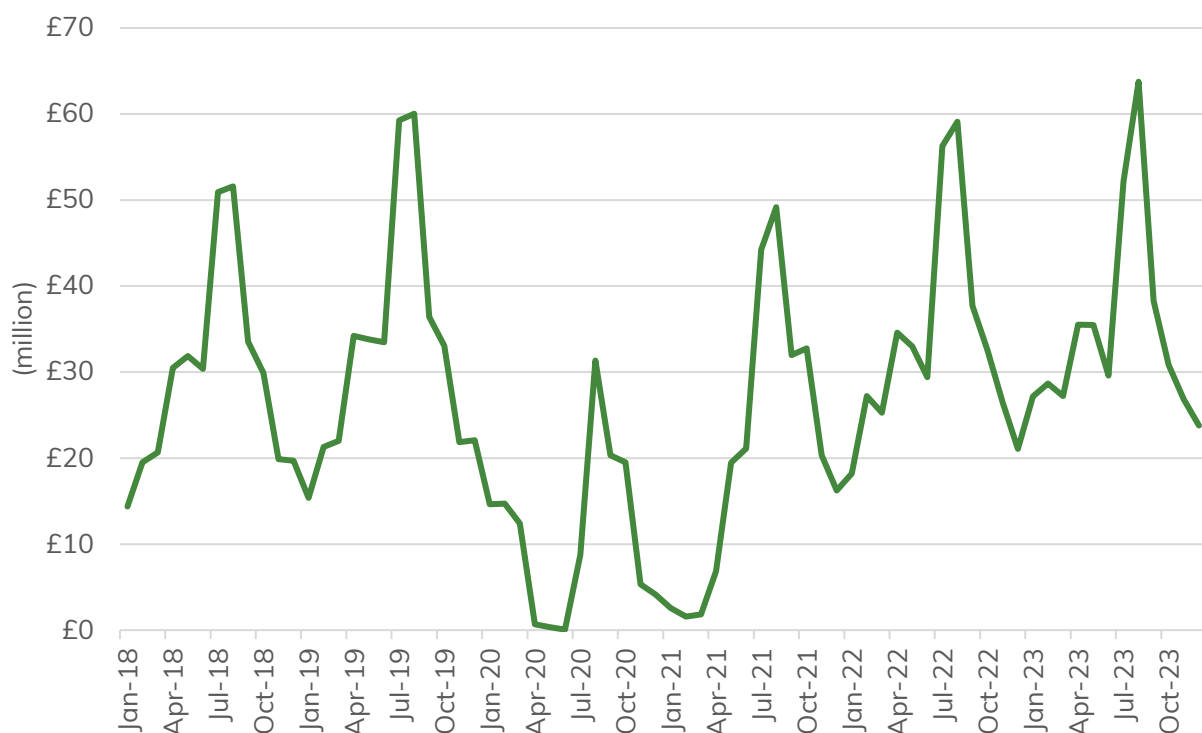


Figure 24 Monthly economic impact from tourism 2018 – 2023 (£M) Cairngorms National Park STEAM Report, 2023).





Monthly economic impact data reflects the seasonality of the tourism industry in Scotland reflecting the patterns seen in the monthly visitor numbers (Figure 21).

Figure 24 shows the changes in monthly economic impact of tourism in the National Park from January 2018 to December 2023. The largest percentage increase in monthly economic impact during this period has been in January when in 2018 when economic impact accounted for £14.39m which in January 2023 increased to £27.19m representing an 89.0% increase. February saw the second largest increase in monthly economic impact from 2018 to 2023 with an increase of 47.0% from £19.51m to £28.67m. July and October saw relatively little change with increases of 2.5% and 3.2% respectively from 2018 to 2023. The only month there was a reported decrease from 2018 to 2023 was in June when economic impact from tourism fell from £30.38m in 2018 to £29.61m in 2023 (-2.5%). It is worth noting that pre-pandemic in 2019 in June the monthly economic impact was £33.46m.

As the fluctuation for monthly economic impact reflect monthly visitor numbers this may indicate a changing pattern in domestic vacation patterns or that behaviour has not fully returned to pre-pandemic patterns, which subsequent years data should be able to show.

The Covid-19 Pandemic had an effect on the monthly economic impact trends experienced prior to 2020. There was some limited recovery during the summer of 2020 coinciding with the lifting of the Covid-19 restrictions, however the peak visitor numbers seen in August produced an economic impact of only £24.27m approximately half of the £48.43m recorded in the previous year for the same month.

Between 2022 and 2023 the largest growth in terms of monthly economic impact was in January which saw a 69.5% increase from £16.04m to £27.19m. The smallest average monthly change between 2022 and 2023 was in July which increased 5.2% from £49.63m to £52.20m. This is only slightly lower than the average monthly increase for this month from 2012 to 2023 which was reported at 6.7%.

Over the longer period from 2012 to 2023 the highest average monthly change was reported in the month of January (18.8%) followed by November (17.8%). Again, using this data, the reported growth in April of 10.7% and in December of 15.5% supports the assertion that visitor spend is increasing during the school holiday periods outside the main summer break.



## Economic impact of tourism: Indexed to 2022 prices to reflect inflation

In 2023 the total indexed (to 2023 inflation figures) economic impact of tourism between 2012 and 2023 was estimated to have contributed approximately £3.9 billion to the Cairngorms National Park economy (Figure 25). There was strong growth, in the two years preceding the Covid-19 Pandemic, with an 11.3% increase from 2018 to 2019. As previously mentioned, the Covid-19 Pandemic had a significant negative impact on the economic impact from tourism in the National Park.

In 2017 a significant contraction of 2.3% in economic impact was recorded despite visitor numbers increasing (Figure 20). This reflects the reduced growth seen in the unindexed figures earlier mentioned in this section (Figure 22).

In 2020 the indexed value of economic impact reduced by 66.4%, presumably wholly due to the effects of the Covid-19 Pandemic. In 2021 and 2022, there was reported growth of 87.8% and 61.5% respectively. Economic impact increased modestly from 2022 to 2023 by only 4.6% perhaps representing signs of recovery in terms of the economy post Covid-19. Note the indexed figures report a more modest economic recovery when compared to those non-indexed figures mentioned earlier (Figure 23).

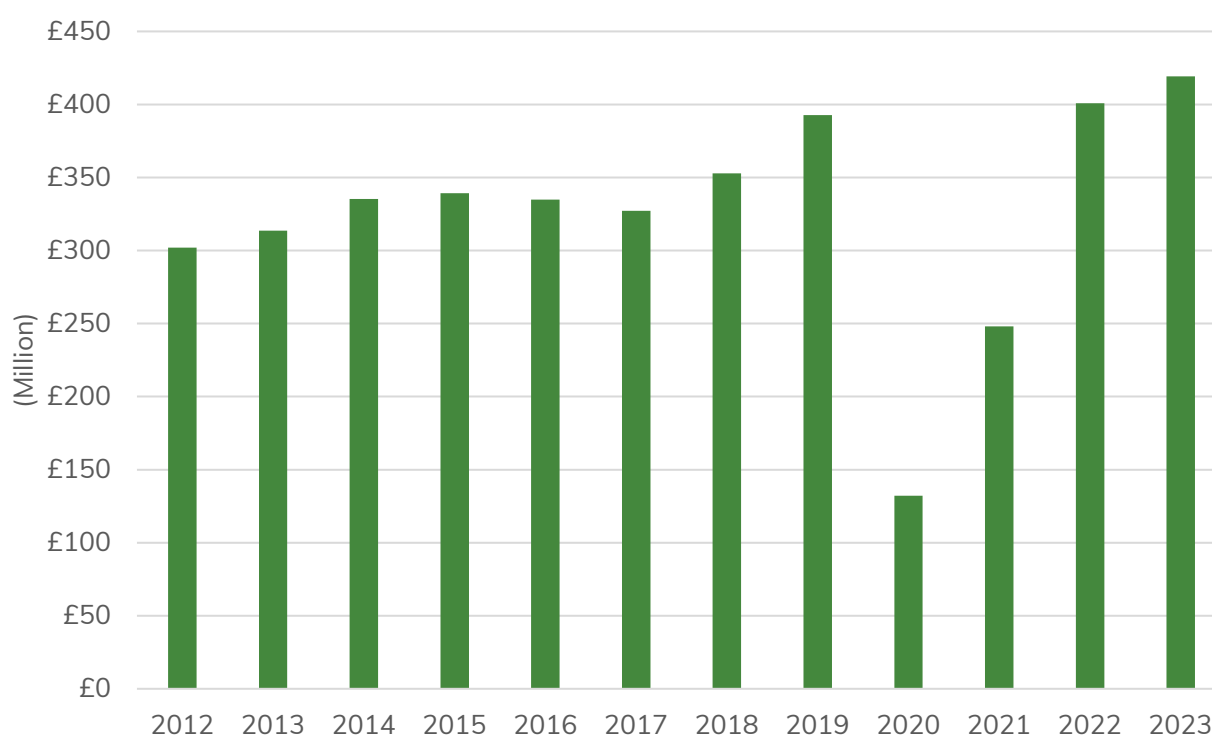


Figure 25 Annual economic impact from tourism (£M) indexed to 2023 inflation prices for the years 2012 – 2023 (Cairngorms National Park STEAM Report, 2023).



## Sectorial distribution of economic impact

The data for the proportional sectorial contributions to the overall economic impact to the economy of the Cairngorms National Park (Figure 26) shows that, pre-pandemic in 2019, accommodation accounted for 26.5% of the total economic impact (not including related VAT) and indirect expenditure attributing 19.2%. Transport and the food and drink sectors contributed 13.6% and 13.8% respectively. The sectorial distribution was relatively stable from 2013 to 2019.

During the Covid-19 Pandemic (2020) there was a drop in the proportional contribution from VAT and shopping. In terms of economic figures (Figure 27), the impact from accommodation dropped from £103.97M in 2019 to £41.33M in 2020. Across all sectors there was a decrease in economic impact in 2020, with the largest reductions seen in the contribution of VAT to the economy. All other sectors reduced within the range of -60.3% (accommodation) to -69.1% (shopping).

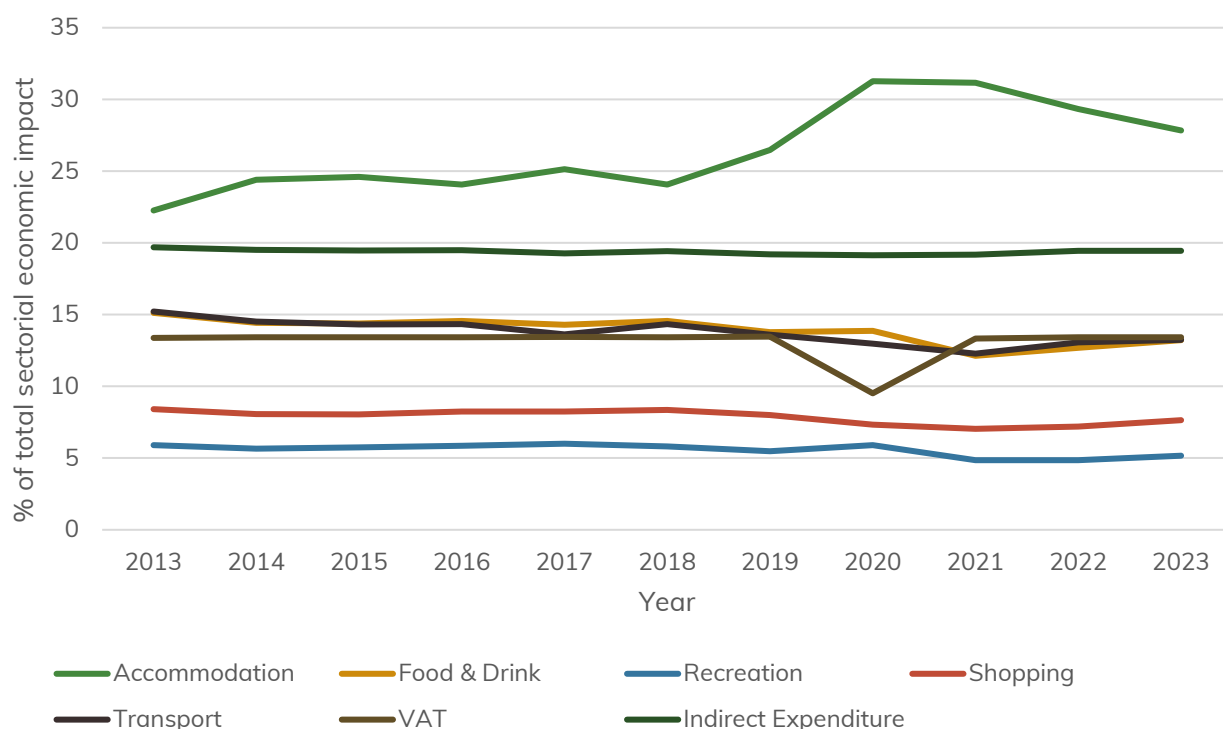


Figure 26 Annual proportional sectorial impact to the total economic impact of tourism in the Cairngorms National Park 2013 – 2023 (Cairngorms National Park 2023 STEAM Report, 2024). Figures used have been indexed to 2023 inflation figures.

In 2023, accommodation was the biggest contributor (27.8%, £116.74m), followed by indirect expenditure (19.4%, £81.56m). Similar figures were reported for Food and Drink (£55.48m), Transport (55.53m) and VAT (56.30m), which were proportionally representative for 13.2%, 13.2% and 13.4% respectively.



Recreation remained the lowest contributor (£21.65m equating to 7.6% proportionally) which may reflect the seasonality of this sectors activities; being mainly summer or winter-based activities with little cross-over.

In 2023 the economic impact from the accommodation sector has surpassed the figures from 2019 increasing by 23.3% (from £103.97m in 2019 to 116.75m in 2023). During the period from 2013 to 2019 accommodation classed economic impact increased proportionally until 2020, followed by a small reduction in 2021 and continues to fall in 2023 perhaps signalling a return to the relative stability seen before the Covid-19 Pandemic. The second largest changes seen during 2020 (during the Covid-19 Pandemic) where seen in the amount and proportions of VAT contributions to overall economic impact from tourism. In 2019 VAT contributed £52.90m (13.5%) which reduced to 12.58m (9.5%) in 2020, however in 2023 has returned to 13.4% which is equal (+ / - 0.1%) to the proportionality of VAT contribution to the economy in the period leading up the Pandemic.



Figure 27 Annual sectorial contribution (£M) to overall economic impact (indexed to 2023 inflation figures) of tourism in the Cairngorms National Park 2013 – 2023 (Cairngorms National Park 2023 STEAM Report, 2024)

## Sectorial tourism employment

There was an overall upward trend in the numbers of people employed in the Cairngorms National Park up until 2019, with a significant reduction of 2,905 full-time equivalent (FTE) positions in 2020 due to the Covid-19 Pandemic (Figure 28). Between



2013 and 2019 the numbers of people employed in tourism related positions in the National Park had increased by 14.1% (+735 full-time equivalent positions).

The decreases in employment figures for 2017 and then also in 2018 reflect the falling economic impact (seen in the indexed data, and a reduced growth rate in unindexed data) attributed to this sector in 2016 and 2017. As market confidence decreased after the fall in economic impact in 2016, it is possible businesses reduced staffing levels in anticipation of a lower expectancy of visitors in the following year.

Between 2020 and 2021 the total number of people employed either directly or indirectly in tourism increased from 3,037 to 3,877 (a 27.7% increase) representing a recovery in the tourism market and lifting of restrictions imposed by the Covid-19 Pandemic.

In 2023 the overall number of people employed in the tourism sector were reported at 5,454 people (full time equivalents) are still 488 people less than the figures seen in 2019 (5,942 people). It is uncertain yet if the numbers of people employed in the tourism industry will return or surpass the numbers employed before the Covid-19 Pandemic in 2024.

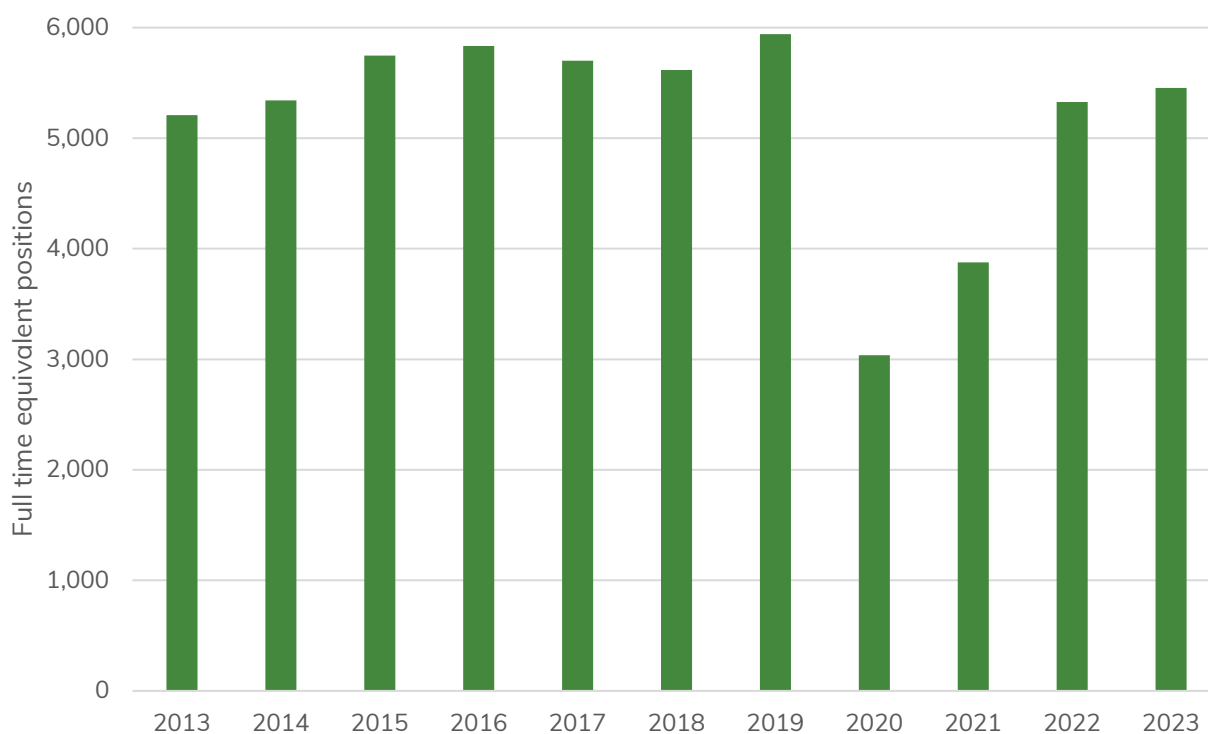


Figure 28 Total annual tourism employment in the Cairngorms National Park 2013 – 2023 (Cairngorms National Park 2023 STEAM Report, 2024).



The profile of the proportions of people working in each sector contributing to the tourism sector changed significantly during 2020, coinciding with the Covid-19 Pandemic (Figure 29). The most pronounced changes were in accommodation which between 2013 and 2019 had ranged between 46.6% and 52.0%, in 2020 this increased to 64.7%. The largest reduction in proportional employment was seen in the transport sector which reduced from 11.6% to 7.3% potentially reflecting the imposed travel restrictions (Figure 29).

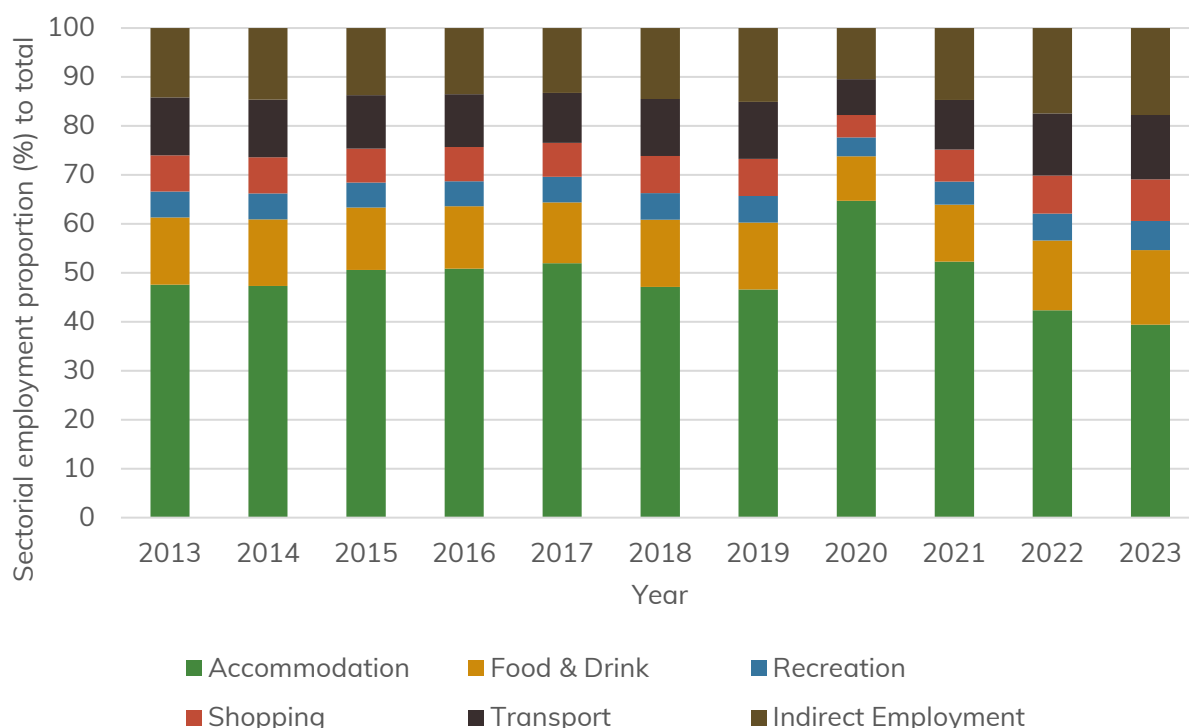


Figure 29 Proportion of employment by sector in tourism in the Cairngorms National Park from 2013 to 2023 (Cairngorms National Park 2023 STEAM Report, 2024).

In the period from 2021 to 2023 the proportion of people working in the accommodation sector has fallen from 52% in 2021 to 39% in 2023 reflecting the increases in the proportion of people in all the other sectors increasing. The figures for the proportion of people employed in the accommodation sector has not returned to the number seen in 2019 when 49% of all employment was in the accommodation sector. In terms of the number of people in 2023, 2,149 people were employed in the accommodation sector 620 people less than in in 2019 before the Pandemic.

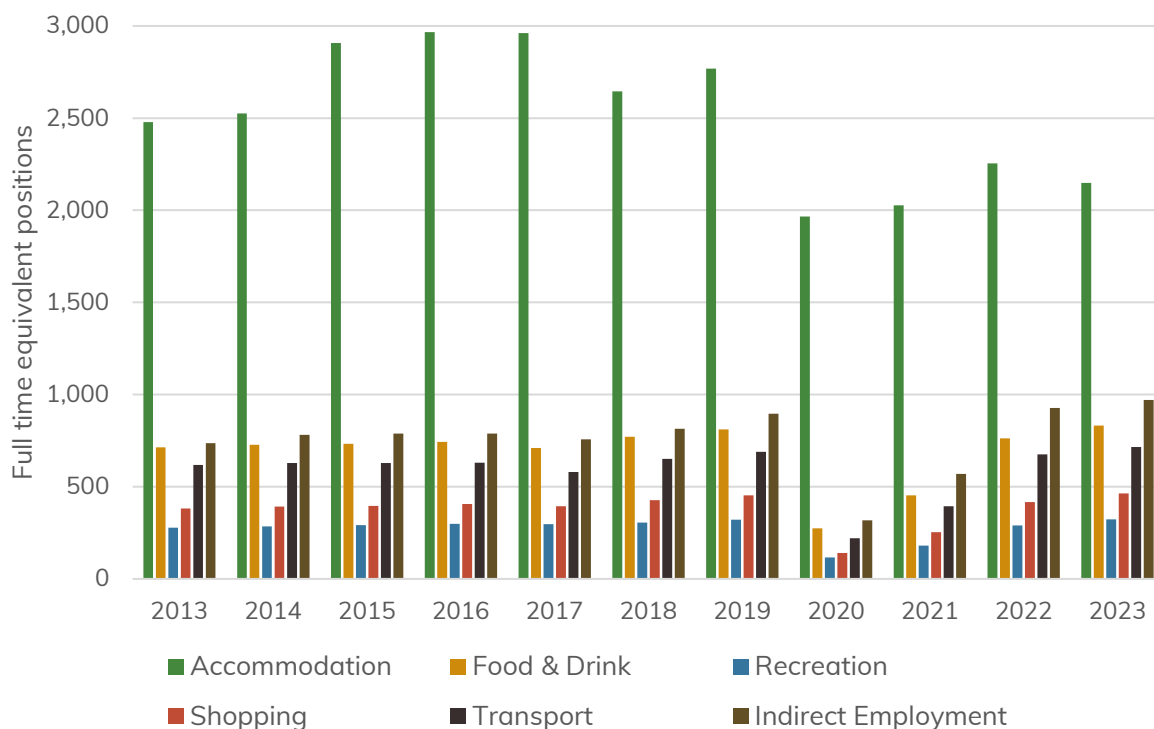


Figure 30 Number of people employed (full-time equivalents) by sector by year in tourism sector of the Cairngorms National Park 2013 – 2023 (Cairngorms National Park 2023 STEAM report, 2024).

In terms of numbers, there has been a slight increase (+ 20 people) in the numbers of people employed in the Food and drink sector from 2019 to 2023. One extra person employed in recreation from 2019 to 2023, 10 extra people in Shopping, and 27 additional people employed in transport. The number of people employed in indirect tourism employment has significantly increased between 2019 and 2023 from 897 people to 970 people (an increase of 73 people).

### Seasonal employment

The Cairngorms National Park experiences seasonal variations in visitor numbers affecting the monthly number of people employed in this sector throughout the year. The monthly figures for the number of people employed in tourism in the National Park (Figure 31) correlates to the changes to monthly visitor numbers (Figure 14).

Looking at the percentage change from 2022 to 2023 there was reduction in staff on the months of July (-7.3%) and October (-5.2%) (Figure 24) with a significant increase in the number of staff in January (+49.5%)



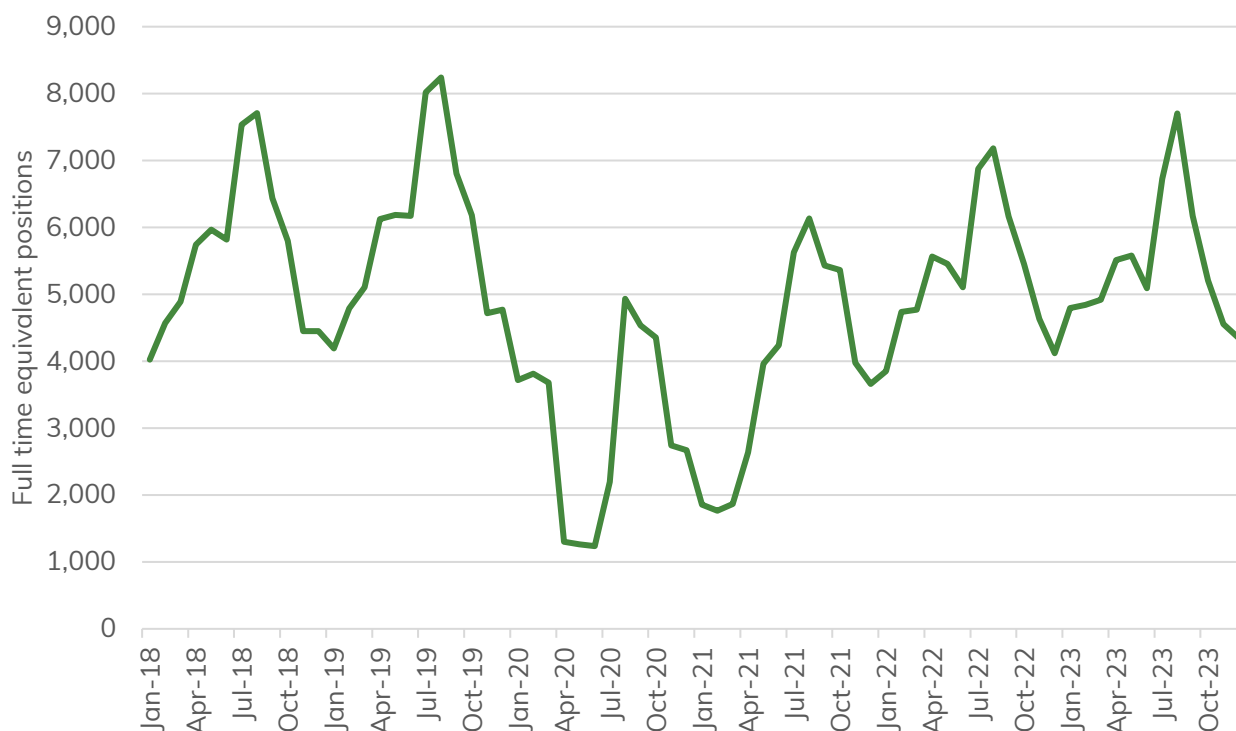


Figure 31 Monthly tourism employment (full-time equivalents) in the Cairngorms National Park 2018 – 2023. (Cairngorms National Park 2023 STEAM report, 2024).

Over the longer period from 2012 to 2023 the largest increase in monthly tourism employment has been in quarter four, which saw an increase of 13.2%, with the highest monthly increases seen in January (27.2%). There were also significant increases in this period in the number of people employed in November (19.3%) and December (15.9%) signalling an increase in demand during the winter period. This is also reflected in the average annual changes for November (+1.8%), December (+1.4%) and January (+2.5%) for the period. During the period (2012 – 2023) there was reduction in the number of people employed in the months of June recorded as a decrease of -1.2% and marginally decreases in March, -0.1% and July -0.2% (Figure 31).

## Accommodation and food services

### Gross Value Added (GVA)

Estimates of current and forecasted Gross Value Added are available by industry for different sectors in the Cairngorms National Park from 2015 to 2032. An overview of all sectors is presented in the economic development section of the Evidence Report. Data for the Gross Value Added generated by accommodation and food services activities for the National Park (Figure 32) gives an indication of the sector's contribution to the total estimated and forecasted Gross Value Added figure for the National Park. In 2023, the Gross Value Added from accommodation and food services activities was estimated to



be £58.89m. This represents 14.5% of the total Gross Value Added from all sectors in 2023 for the National Park.

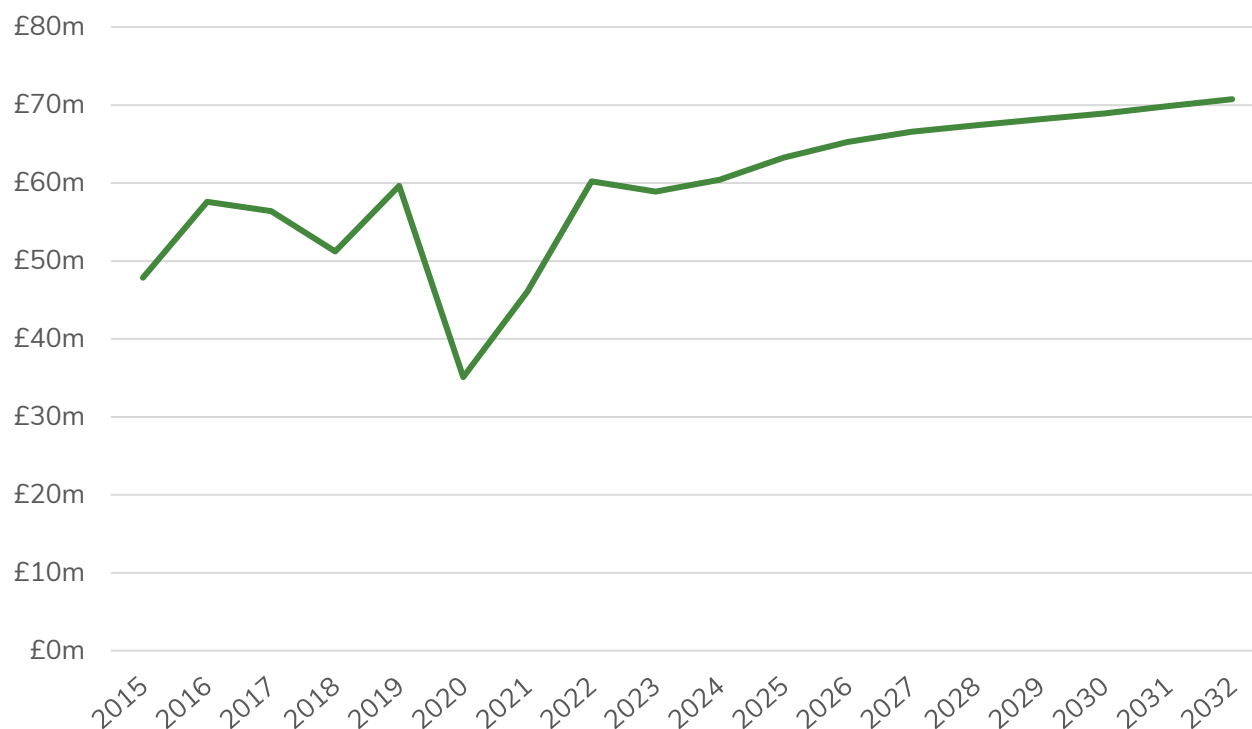


Figure 32 Forecasted Gross Value Added for the accommodation and food services sector in the Cairngorms National Park 2015 – 2032 (Oxford Economics, 2022).

Looking forward accommodation and food services activities are forecast to grow by 5.0% in the mid-term (2022 – 2025) representing an absolute change of £3.03m, and in the long-term (2025 – 2032) it is expected to grow by 11.9% representing an absolute change of £7.51m.

## Employment

The report by Oxford Economics also looks at the employment by sector and total future demand for people based on the growth forecast (and replacement demand). In 2023 the report estimates that accommodation and food services activities employed 1,8009 people. In the mid-term (2022 – 2025) this is expected to increase to 1,900 (7.3% increase) meaning approximately 100 more people will be required to fill positions. In the long-term (2025 – 2032) the forecast is for 4.0% growth (representing approximately 100 additional positions).

<sup>9</sup> The data is provided rounded to the nearest 100, with calculations based on unrounded figures. For further information see: <https://cairngorms.co.uk/wp-content/uploads/2024/06/Economic-Forecasts-Cairngorms-National-Park-2022.pdf>



In terms of the total requirement for people required to fill vacant positions in the National Park in the mid-term (2022 – 2025) this would be 400 people (which includes 300 people required due to replacement demand). In the long-term (2025 – 2027) the total requirement would be 800 people (this includes 700 people required due to the replacement demand).

## **Cairngorms Business Barometer**

Each quarter National Park Authority and Cairngorms Business Partnership commission the Cairngorms National Park Business Barometer which seeks feedback from business operators across the Cairngorms National Park on a range of aspects including ongoing performance and confidence in the future which allows for a quarterly assessment of the 'health' of the economy in the National Park.

Looking at the reporting for quarter one of 2024 gives a snapshot of the current 'health' of the economy. 68 business took part in the survey in quarter one of 2024. Although the report is not exclusively reporting on the tourism sector (the economy in the National Park is heavily reliant on this sector) it provides useful feedback in relation to tourism.

Comparing quarter one of 2024 to the same period in 2023 a larger percentage of businesses reported a decrease in both numbers of customers and levels of turnover.

One of the barriers to business profitability mentioned in the report was the closure of VisitScotland iCentres: Lack of clear communication on closures and the role of printed materials.

Given the profile of businesses taking part in the survey, many of those responding stated that they had no issues with staff recruitment or retention as they do not have any employees. However, around a fifth (22%) stated that recruiting new staff was either a major or moderate issue while 13% had issues with staff retention. Recruitment issues were often related to a lack of housing for staff and/or problems that had arisen since Brexit.



## Visitor attractions

There are a wide range of Visitor attractions in the Cairngorms National Park ranging from whiskey tours and distilleries to skiing and winter sports. For simplicity the attractions have been grouped into the following themes in this section namely:

- Adventure and sports
- Nature-based tourism
- Heritage (including museums, castles and historic buildings / places)
- Distilleries
- Other

## Adventure and sports

People visit the Cairngorms National Park for a number of reasons, however perhaps the most compelling reason being the adventure activities the area provides from skiing and winter sports, hiking and biking to water sports on one of the many lochs in the area.

## Snowsports

It is estimated that in 2021 / 2022 the Snowsports sector contributed £20.1 million in net Gross Value Added to the Scottish economy, employing 510 net full-time equivalent jobs and £15.3 million in net wages. The sector in Scotland has seen little growth in recent years, with visitors to mountain centres in 2021 / 2022 was 66% lower than in 2015 / 2016, and 70% lower than in 2010 / 2011. Late snowfall, poor weather conditions, and the COVID-19 pandemic, have all impacted on visitor numbers<sup>10</sup>.

The Cairngorms National Park is home to three out of Scotland's five mountain venues – Cairngorm Mountain, Glenshee and The Lecht (Figure 33). All three resorts now function with the aid of a snow factory. Supplementing these are three venues with dry ski slopes – Glenmore Lodge, Lagganlia Outdoor Centre and Loch Insh Watersports. Combined they provide approximately 142 full-time equivalent positions (around 30% of all snowsports full-time equivalent positions in Scotland) (Table 3).

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<sup>10</sup> See <https://www.gov.scot/binaries/content/documents/govscot/publications/research-and-analysis/2023/02/economic-social-cultural-impact-scotlands-snowsports-sector-2022/documents/economic-social-cultural-impact-scotlands-snowsports-sector-2022/economic-social-cultural-impact-scotlands-snowsports-sector-2022/govscot%3Adocument/economic-social-cultural-impact-scotlands-snowsports-sector-2022.pdf>



Table 3 Employment by snowsport venues 2021 / 2022<sup>11</sup> (Scottish Government, 2023).

Venue	Full-time	Part-time	Seasonal	Full-time equivalent
Cairngorm Mountain	34	6	50	50
Glenshee	14	2	40	25
The Lecht	23	19	40	43
Glenmore Lodge	3.5	3.5	10	8
Lagganlia	3.5	3.5	10	8
Loch Insh	3.5	3.5	10	8
Total	81.5	37.5	160	142

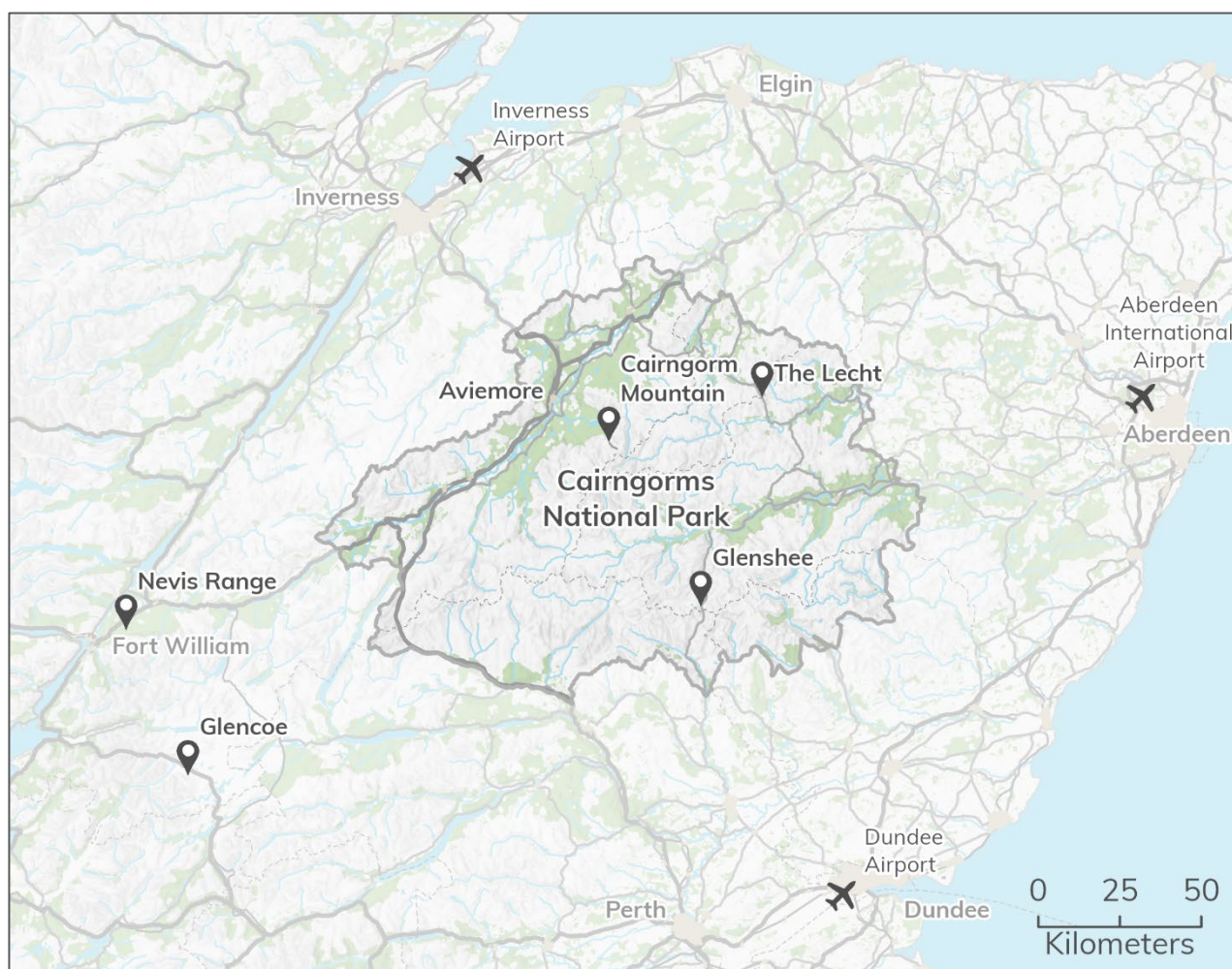


Figure 33 Map of mountain ski resorts in Scotland. Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2024. All rights reserved. Ordnance Survey Licence number 100040965, Cairngorms National Park Authority.

<sup>11</sup> Glenmore Lodge, Lagganlia Outdoor Centre and Loch Insh Watersports have had their employment levels estimated due to a lack of data return.



According to the 2019 – 2020 visitor survey, 7% of visitors to the Cairngorms area were there to take part in skiing and / or snowboarding. Of those surveyed in winter, 42% were visiting to take part in winter sports. In 2021 / 2022 the National Park's mountain venues received approximately 67,000 visitors, 80% of whom were day visitors. This represents 75% of visitors to all of Scotland's mountain snowsport venues (Table 4).

Table 4 Visitors to mountain snowsport venues 2021 / 2022 (Scottish Government, 2023).

Venue	Total visitors	Number of day visitors	Number of overnight visitors	% of day visitors	% of overnight visitors
Cairngorm Mountain	15,376	9,155	6,221	60%	40%
Glenshee	35,557	30,668	4,889	86%	14%
The Lecht	16,063	13,574	2,489	85%	15%
Total	66,996	53,397	13,599	80%	20%

Average visitor spend ranged from £29 - £90 for day visitors and £412 - £936 for overnight visitors, with visitors from outside the UK contributing the highest average spend (Table 5).

Table 5 Average spend by snowsport venue and visitor's origin 2021 / 2022 (Scottish Government, 2023).

Venue	Day visitors		Overnight visitors		
	Scotland	Rest of UK	Scotland	Rest of UK	Outside UK
Cairngorm Mountain	£29	£90	£433	£567	£936
Glenshee	£51	£75	£412	£654	£641
The Lecht	£57	£45	£458	£849	-

### Cairngorm Mountain

Cairngorm Mountain is possibly the best known and most used ski and winter sport destination. Out of the three ski resorts it offers the most challenging runs, serving both Skiing and Snowboard users. It can accommodate a wide range of abilities with a dedicated beginners area serviced by a magic carpet at the foot of the mountain (Figure 34). Due to its location and altitude, it has potentially the longest season of operation with snow often lasting into April.





Its close proximity to Aviemore and its range of other activities make it particularly attractive as there are plenty of other activities nearby should the weather not be favourable for winter sports. The funicular railway (Scotland's only mountain railway) was closed during the 2023 / 2024 winter. When its service resumes it allows easy access to the top of the mountain and Ptarmigan restaurant, which is the highest in the UK at 1,097m above sea level.





Figure 35 Map of walking routes at Cairngorm Mountain. (Cairngorm Mountain (Scotland) Ltd, 2024)

In recent years Cairngorm Mountain has diversified to offer year-round activities for tourists including a Mountain Tubing Park, mountain bike trails, and guided mountain walks (Figure 35). The current mountain garden was introduced in 2001, offering a wildlife haven, viewpoints and hides to observe nature, a mountain garden storywalk and a camera obscura.

Further information about Cairngorm Mountain is provided on page 21 of this report.

### **The Lecht**

The Lecht Ski resort is located 645m above sea level in the Eastern Cairngorms on the mountain pass route (A939) between Strathdon and Tomintoul. It is the smallest of five ski centres in Scotland. It has 20 maintained ski runs and 14 lifts (1 chairlift and 13 ski tows) (Figure 36).

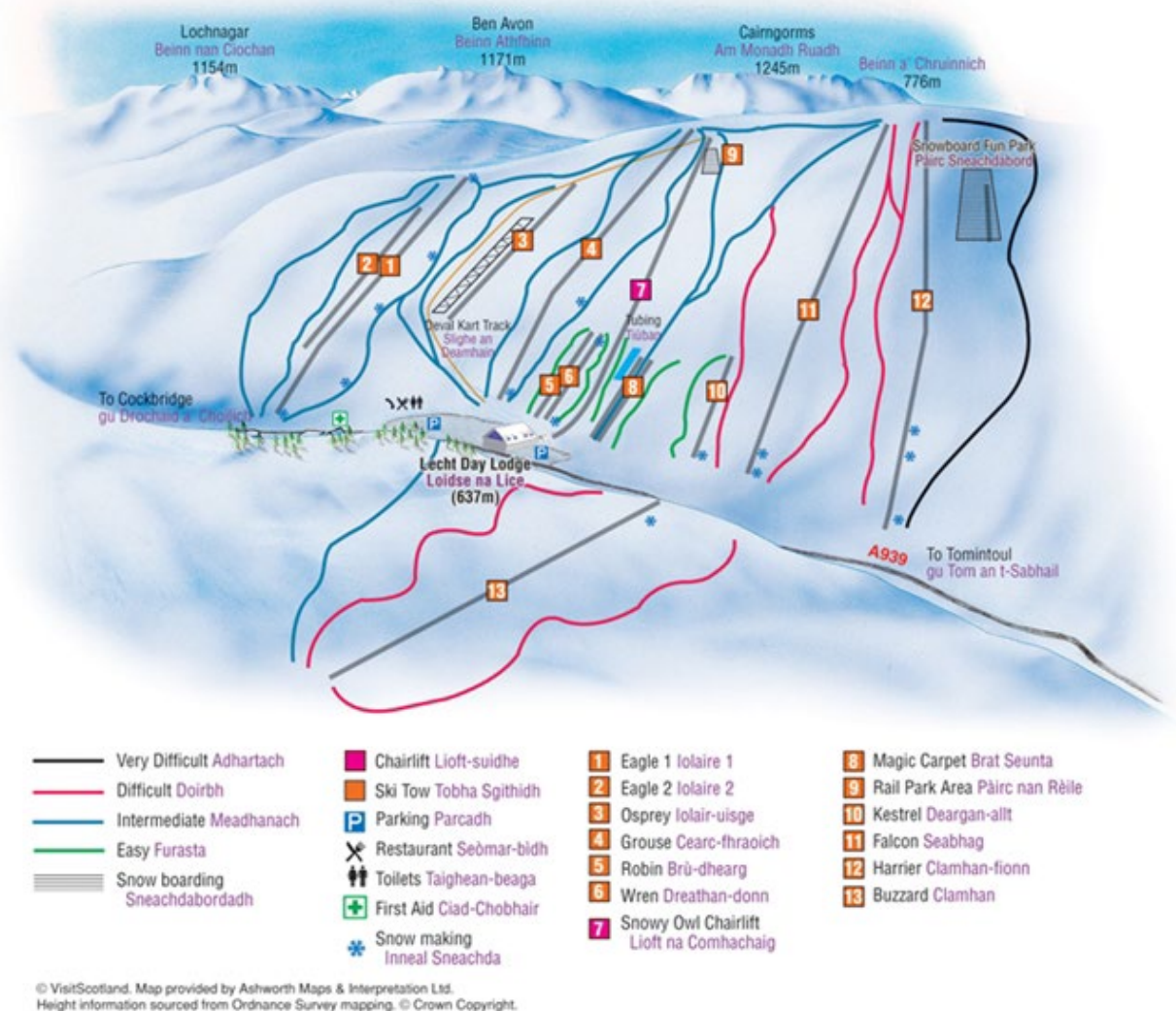


Figure 36 Map of The Lech Ski Resort, © Visit Scotland; Map produced by Ashworth Maps and Interpretation Ltd. Height Information sourced from Ordnance Survey mapping. © Crown Copyright

In the summer months the destination has two mountain bike trails, which can be accessed with a bike via the chairlifts.

## Glenshee

Glenshee is the largest skiing resort in Scotland and at its highest piste is 1,068m. The whole resort covers more than 2000 acres. It extends across four mountains and three valleys (Figure 37 and Figure 38) and contains 36 runs and 21 lifts and tows. The resort is run and managed by the Glenshee Snowsports Centre. It hosts a wide range of runs catering for all abilities with some of Scotland's most diverse terrain for snow sports.



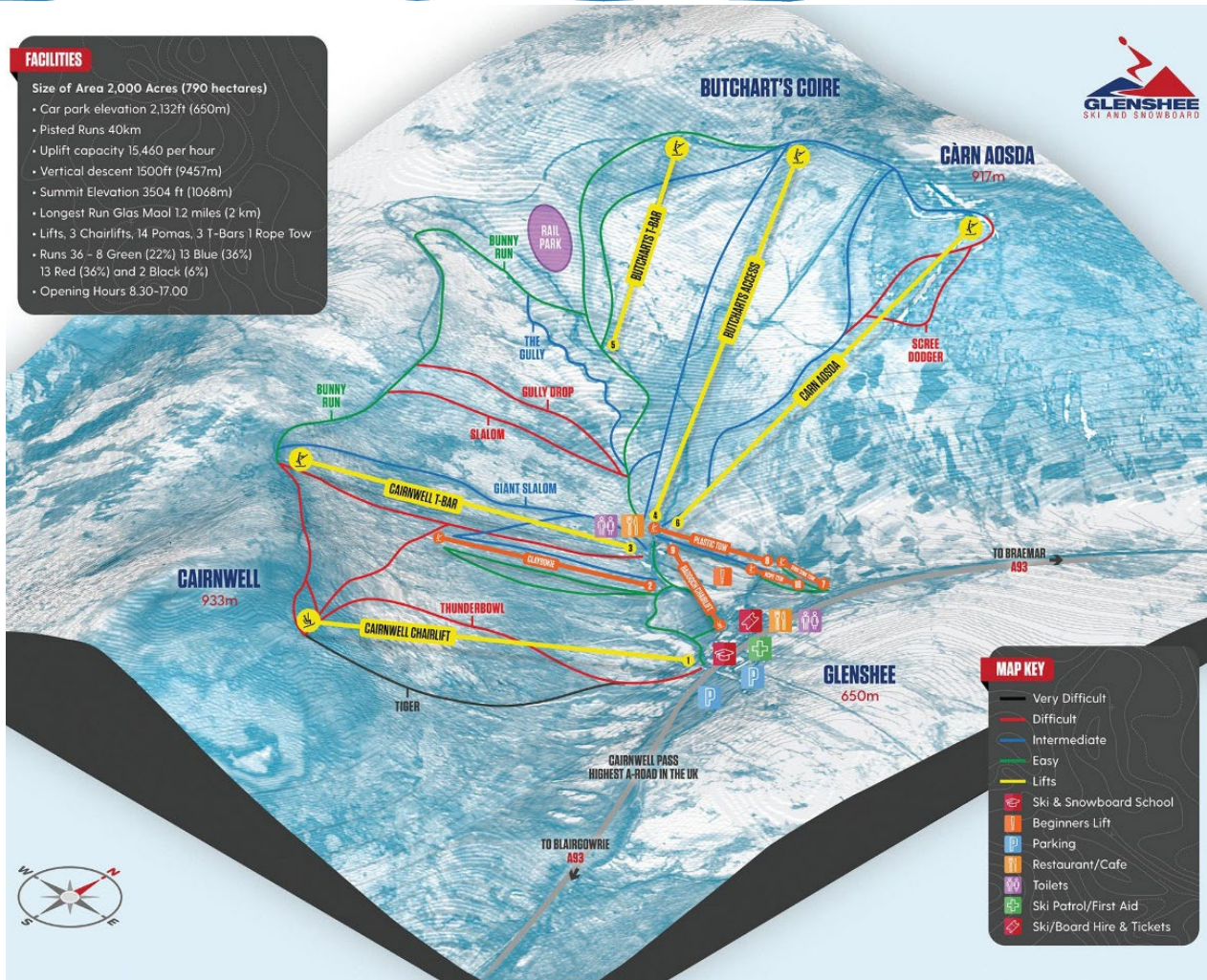


Figure 37 Map 1/2 Glenshee Ski Resort © Glenshee Snowsports Centre, 2024



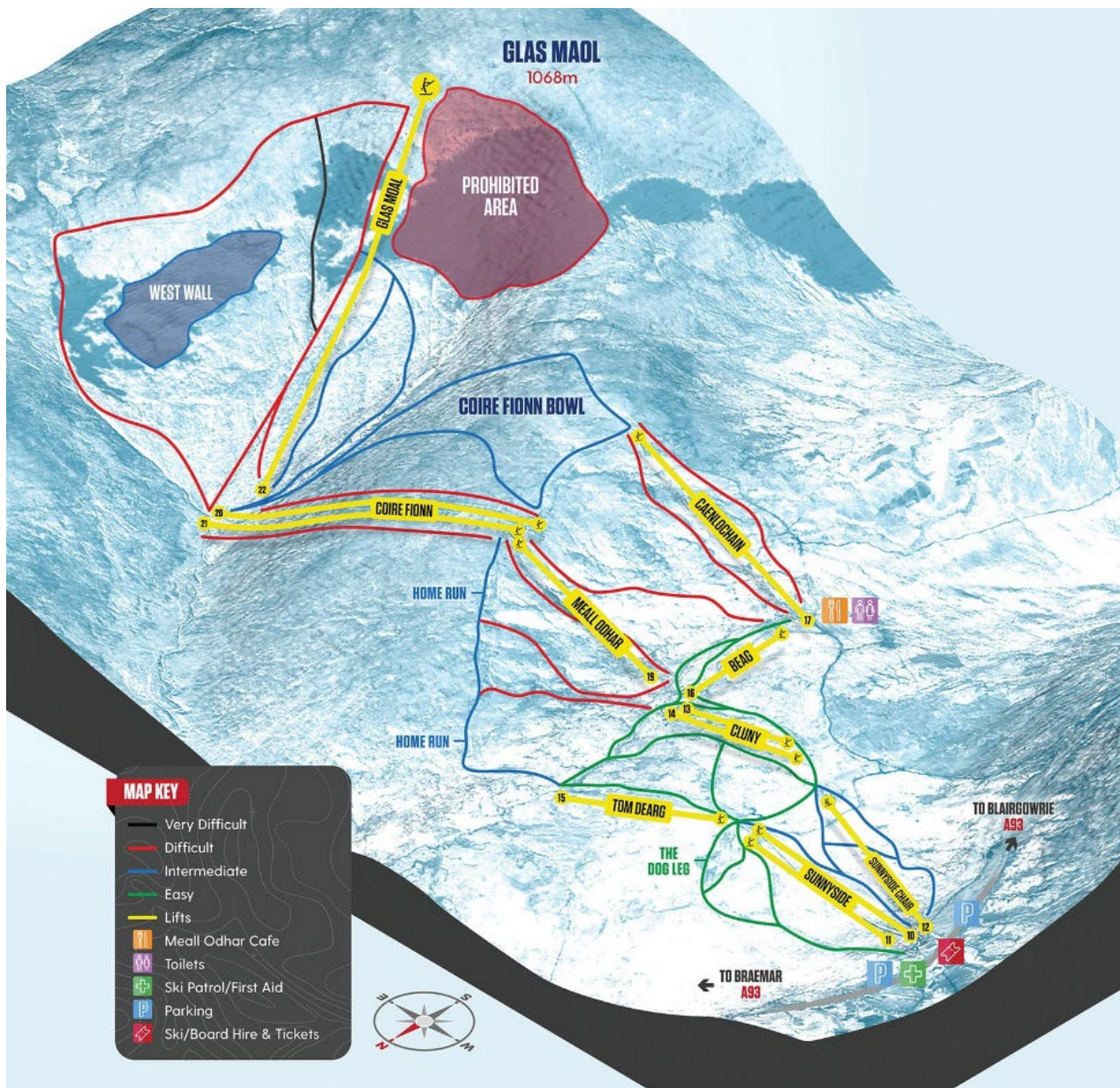


Figure 38 Map 2/2 Glenshee Ski Resort © Glenshee Snowsports Centre, 2024

During the summer months Glenshee offers hiking and, mountain biking opportunities. The base café is open during the summer months, and the site offers a chairlift (weather permitting) offering a 285m elevation gain for mountain bikers.

### Water sports

The Cairngorms National Park is well known for its clean rivers and deep lochs set against a backdrop of high mountains. It is in these mountains that many of Scotland's iconic rivers are sprung from the Dee to the Don and the Mark to the Tilt.



Sailing, windsurfing, paddle sports, rafting, swimming or gorge walking are all within easy reach of many of the towns and villages in the Cairngorms National Park including the Aviemore, Angus Glens, Royal Deeside, Glenlivet, Atholl and Glenshee areas. According to the 2019 - 2020 visitor survey, 1% of visitors to the Cairngorms area were there to take part in canoeing and / or kayaking activities.

There are two main water sports centres in the National Park located at Loch Morlich and Loch Insh (Figure 39). There are a number of other lochs and riverside opportunities for unregulated water sport use across the National Park.

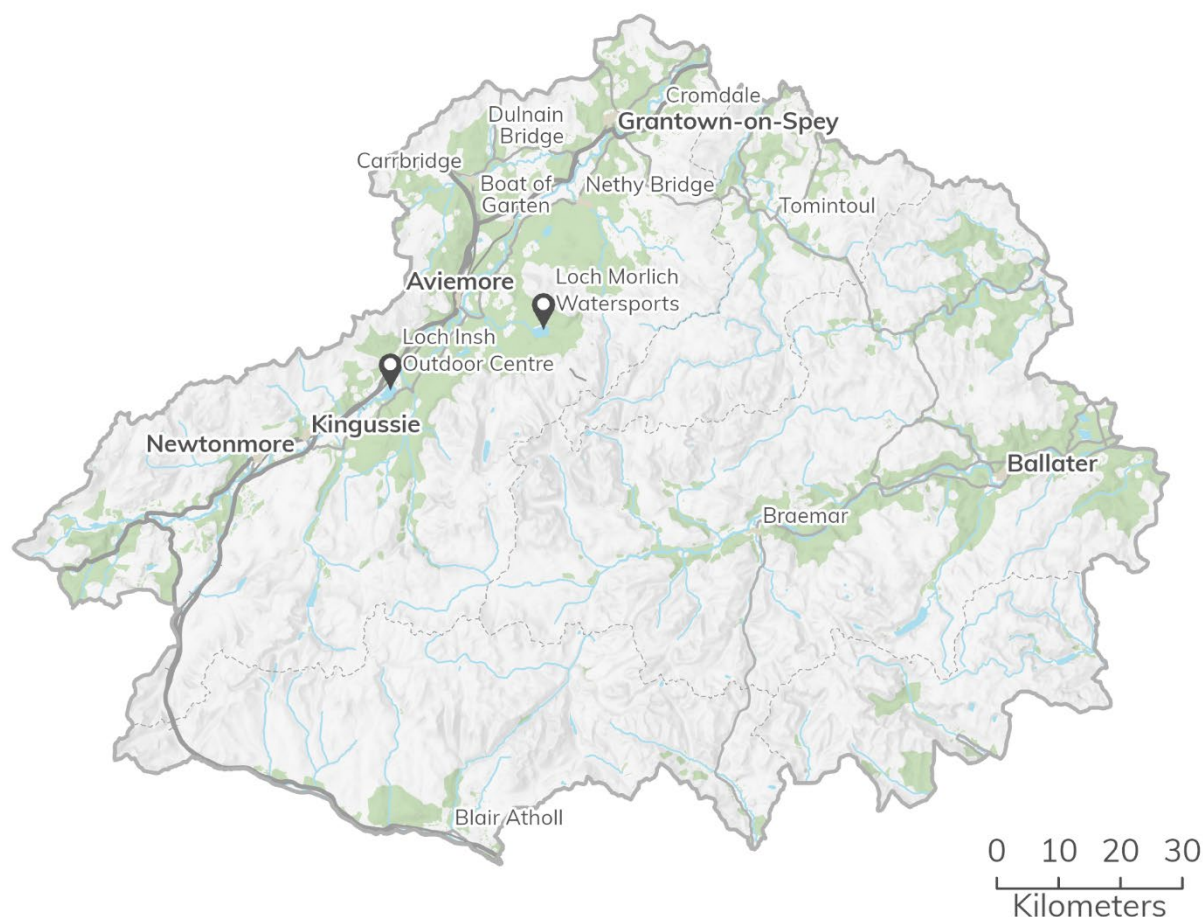


Figure 39 Map of the major outdoor water sports centres in the Cairngorm National Park. Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2024. All rights reserved. Ordnance Survey Licence number 100040965, Cairngorms National Park Authority.



### **Loch Insh Outdoor Centre**

Loch Insh is located at the lower end of Glen Freshie in the foothills of the Cairngorms Mountains. The river Spey widens out to form Loch Insh. The centre offers a range of water sport activities including sailing, paddle boarding, rafting and fishing.

Off-water activities at the centre include archery, play parks and a dry ski slope as well as various walking and mountain biking trails.

### **Loch Morlich Watersports**

Loch Morlich offers over 1km of natural sand beach set against a background of the mountain ranges of the Cairngorms and Glenmore Forest. Loch Morlich Watersports offers a range of activities including stand up paddleboarding (SUP), kayaking, canoeing, and mountain biking.

### **Golf**

In 2016 it was estimated that the economic value of golf tourism for the Scottish economy was around £286 million in output, 4,700 jobs and £154 million in Gross Added Value. The Highlands region was the second most important region in terms of gold tourism (second to Fife), which contributed £23 million in direct output<sup>12</sup>.

There are thirteen golf courses in the Cairngorms National Park, offering differing difficulty levels, character and length, both 9 and 18-holes (Figure 40).

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<sup>12</sup> See <https://www.scottish-enterprise.com/media/hcjpgsyq/scotland-golf-visitor-survey-and-economic-impact-2016-full-report.pdf>





Number of holes

-  9
-  18

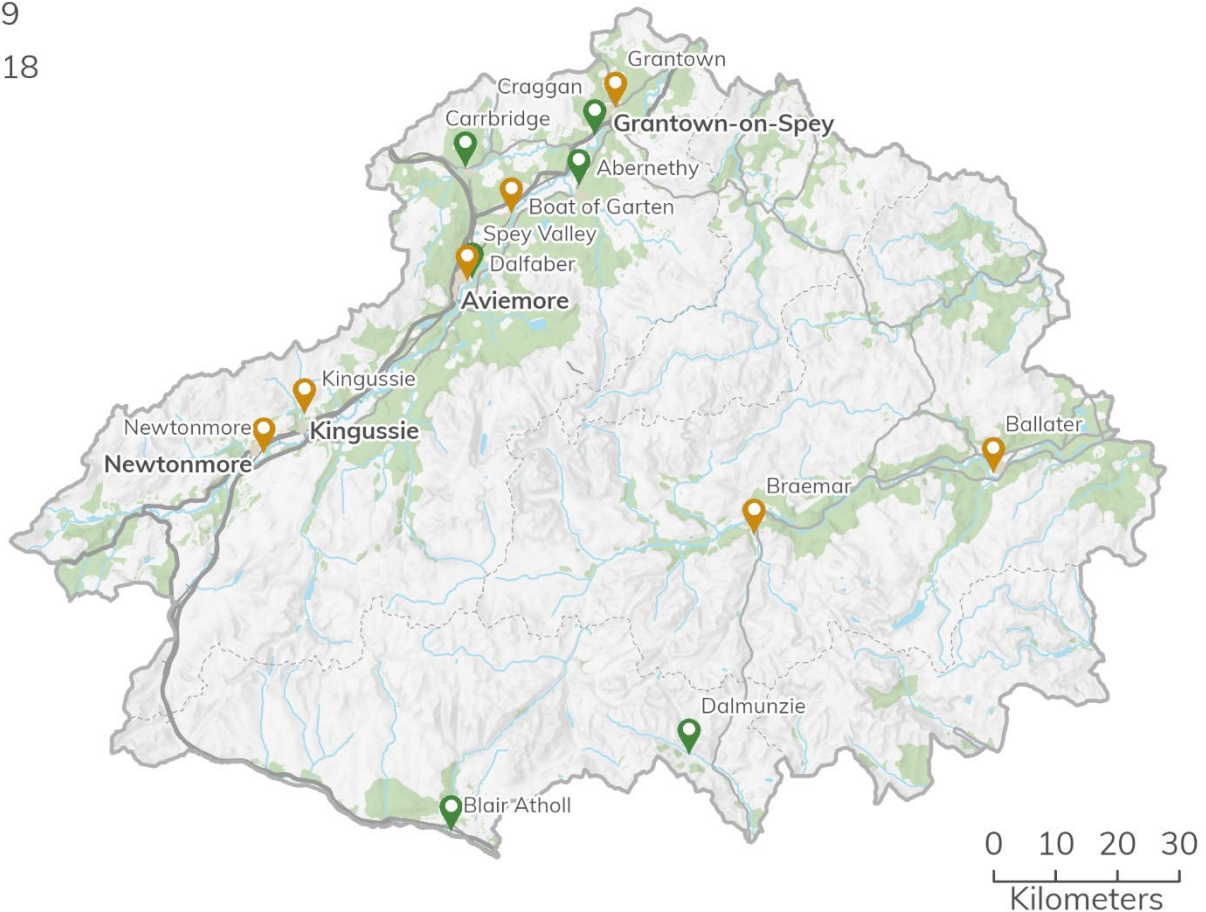


Figure 40 Map of showing the golf courses in the Cairngorms National Park in 2024. Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2024. All rights reserved. Ordnance Survey Licence number 100040965, Cairngorms National Park Authority.

## Highland Games

The Highland Games are events held in Scotland, during the spring and summer months, that celebrate the Scottish and Celtic culture. In the National Park the games (otherwise known as gatherings) are held at the following locations (Figure 41):

- Newtonmore Highland Games
- Ballater Highland Games
- Braemar Highland Gathering
- Blair Atholl Gathering
- Tomintoul Highland Games
- Lonach Highland Gathering and Games



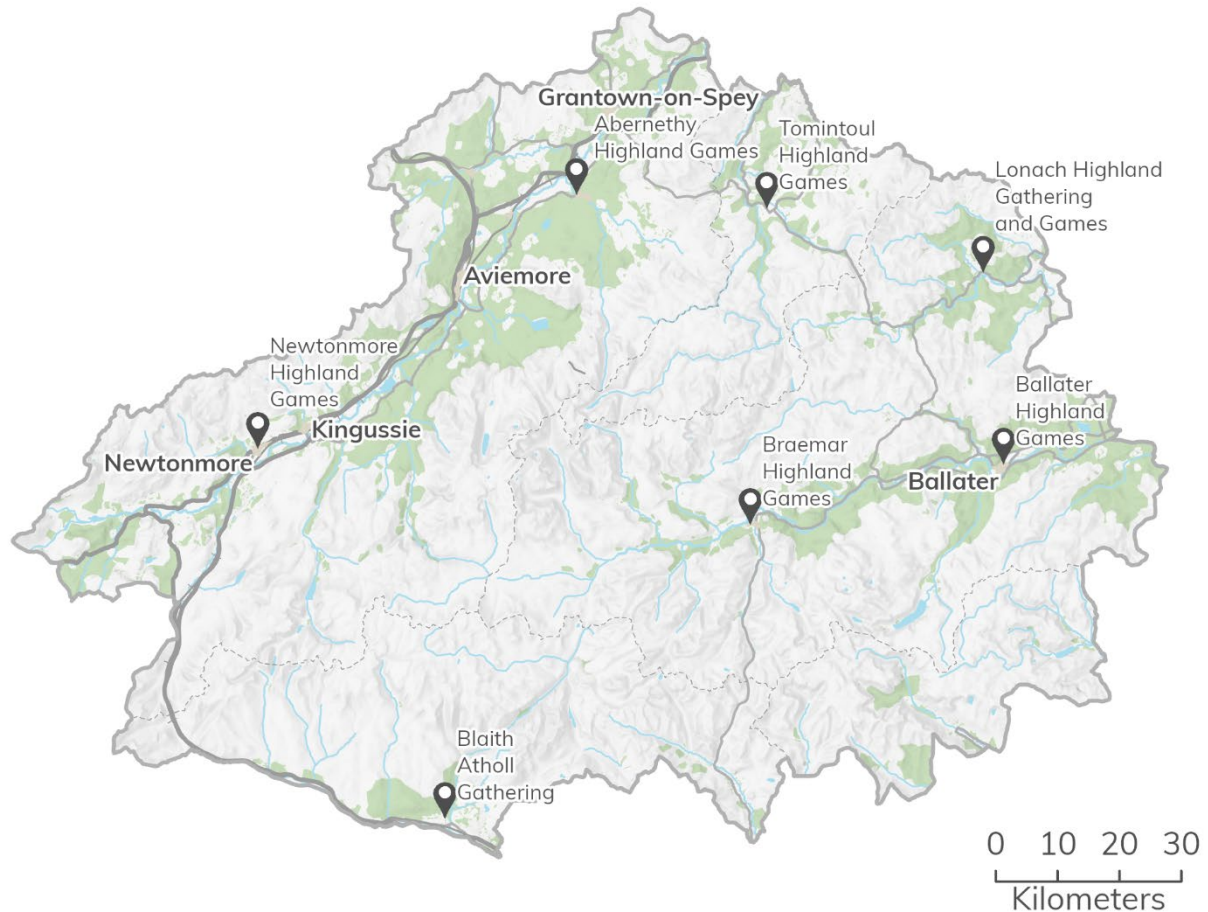


Figure 41 Map of the Highland Games locations in the Cairngorms National Park. Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2024. All rights reserved. Ordnance Survey Licence number 100040965, Cairngorms National Park Authority.

The Braemar Gathering, held in September, is the biggest and most prestigious Highland Games event and enjoys the annual attendance of the Royal Family.

There are also smaller events such as the Abernethy Highland Games. The Abernethy Highland Games are one of the oldest Games in the country. Known as the 'Friendly Games' the Games was also originally the place of the annual Clan Grant Gathering.

### **Mountain bike parks**

Every year, the global adventure tourism industry continues to go from strength to strength. Mountain bike tourists play a significant role in this growth, contributing millions of pounds to the Scottish economy<sup>13</sup>.

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<sup>13</sup> <https://scottishmtbtourism.com/why-mtb-tourism/>



As a decline in winter snow and the challenges faced by climate change become more prevalent at the National Park's ski resorts, the inclusion and potential future expansion of mountain bike activities offers a potential new revenue stream and supports a year-round economy. According to the 2019 – 2020 visitor survey, 8% of visitors to the Cairngorms area were there to take part in cycling and / or mountain biking activities.

There are a number of mountain bike parks in the Cairngorms National Park (Figure 42), including:

- Cairngorm Mountain Bike Park at Cairngorm Mountain
- Laggan Wolftrax – owned and managed by Forestry and Land Scotland
- Glenlivet Mountain Bike trails (hire available)
- Glenshee Mountain Bike Track (with lift).

There are smaller bike parks in some of the settlements in the National Park including:

- Anagach Woods mountain bike skills park
- Carrbridge Bike Park
- Boat of Garten – Woodland Wheels Pump Track.

There are opportunities for bike hire in Boat of Garten, Grantown on Spey, Aviemore, Kingussie and Ballater. There are 37 other trails listed on the Visit Cairngorms website.

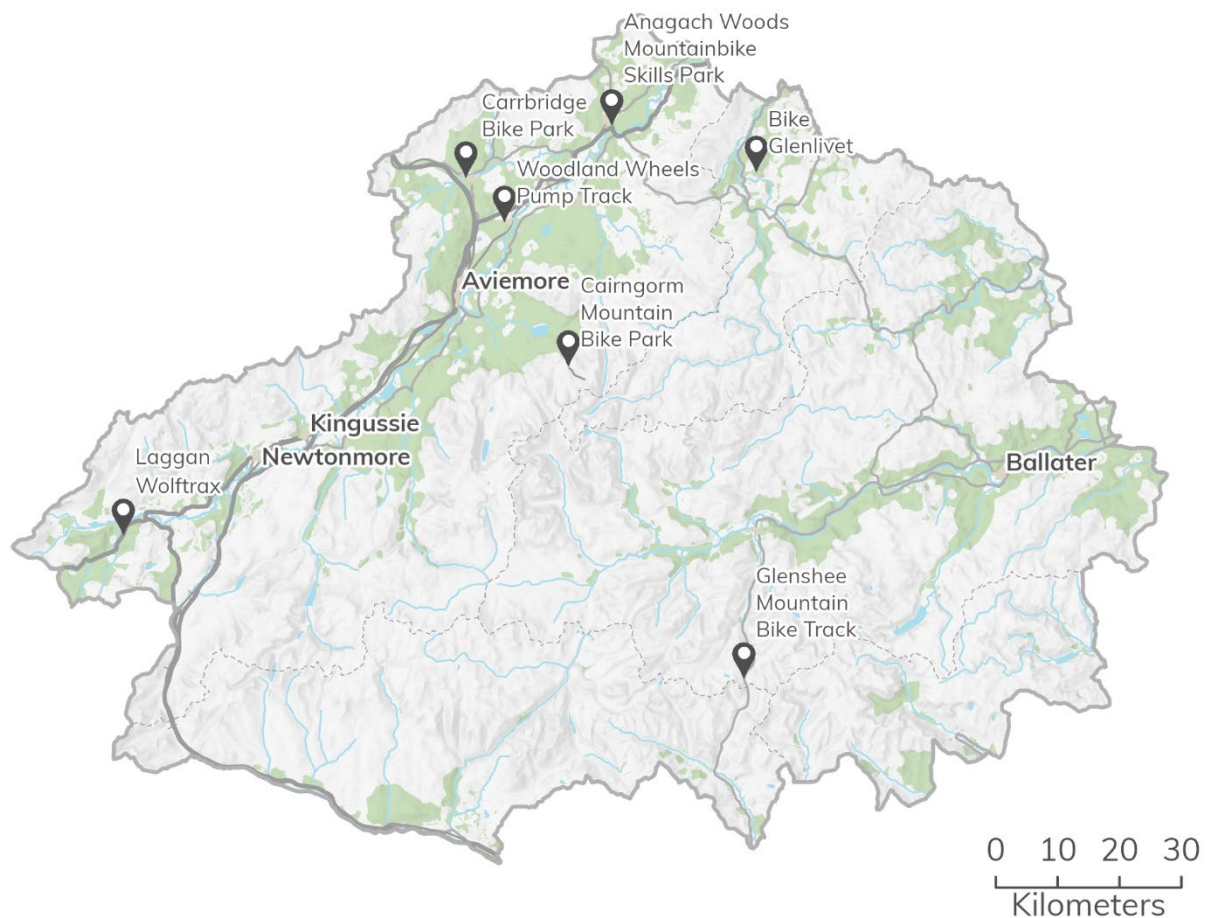


Figure 42 Map of the mountain bike parks in the Cairngorms National Park. Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2024. All rights reserved. Ordnance Survey Licence number 100040965, Cairngorms National Park Authority.

## Walking

The Cairngorms National Park covers an area with a distinct geography featuring very mountainous terrain and long river systems. Historically, this landscape has acted as a significant constraint to people travelling through the area and has prevented few modern roads penetrating far into the National Park, making it particularly rich in long distance historic paths and roads.

According to the 2019 - 2020 visitor survey, 25% of visitors to the Cairngorms area were there to take part in walking activities (other than hillwalking), while 17% were there to take part in hillwalking activities.

There are also 1,000kms of waymarked paths close to towns and villages that allow you to explore the area. There are 17 community paths leaflets available as well as two easy access guides: one in Badenoch and Strathspey and one in Deeside.



The villages and towns in the Cairngorms National Park have networks of community paths and trails. More information and maps of the community paths and trails can be found here:

- <https://cairngorms.co.uk/discover-explore/things-to-do/walking-trails/community-paths-and-trails/>

More information on the main walking routes over hill passes in the Cairngorms National Park can be accessed here:

- <https://cairngorms.co.uk/discover-explore/things-to-do/walking-trails/>

There are a number of long-distance routes within the Cairngorms National Park including:

- The Speyside Way is one of four official long-distance routes in Scotland, the route links the Moray coast with the edge of the Grampian Mountains, following the valley of the River Spey, spanning a distance of approximately 65 miles (Figure 3, page 15). More information on the Speyside Way is available here: <https://www.scotlandsgreattrails.com/trail/speyside-way/>
- The Deeside Way which runs from near the centre of Aberdeen to Ballater, following the line of the Old Royal Deeside Railway through woodlands and farmlands, for a total distance of 41 miles (Figure 3).
- The Cateran Trail is a 64mile-long route through Perthshire and the Angus Glens, this is a circular route divided into five stages, following old drove roads and ancient tracks across farmland, forests, and moors (Figure 3). More information on the Cateran trail is available here: <https://www.pkct.org/cateran-trail>
- The Dava Way links Forres in Moray with Grantown on Spey, a distance of 24 miles following the old Highland Railway line and winds its way up to the Dava summit at 320m before descending into Strathspey (Figure 3). More information on the Dava Way is available here: <https://davaway.org.uk/>.

Further matters relating to rights of way, core paths and active travel will be covered in the Sustainable transport section of the Evidence Report.

The mountainous terrain of the National Park is a particular draw for walkers. Certain categories of hill / mountain are particularly sought after and present particular pressures on the infrastructure and environment of the area. For example, 'Munro bagging' is popular. Munros are mountains in Scotland that are at least 3,000 feet high





(approximately 914 metres) and are named after Sir Hugh Thomas Munro, (1856 - 1919) who was the first to publish a list of all the mountains of this type in the Journal of the Scottish Mountaineering Club in 1891. There are currently more than 50 'Munros' within the Cairngorms National Park (Figure 43).

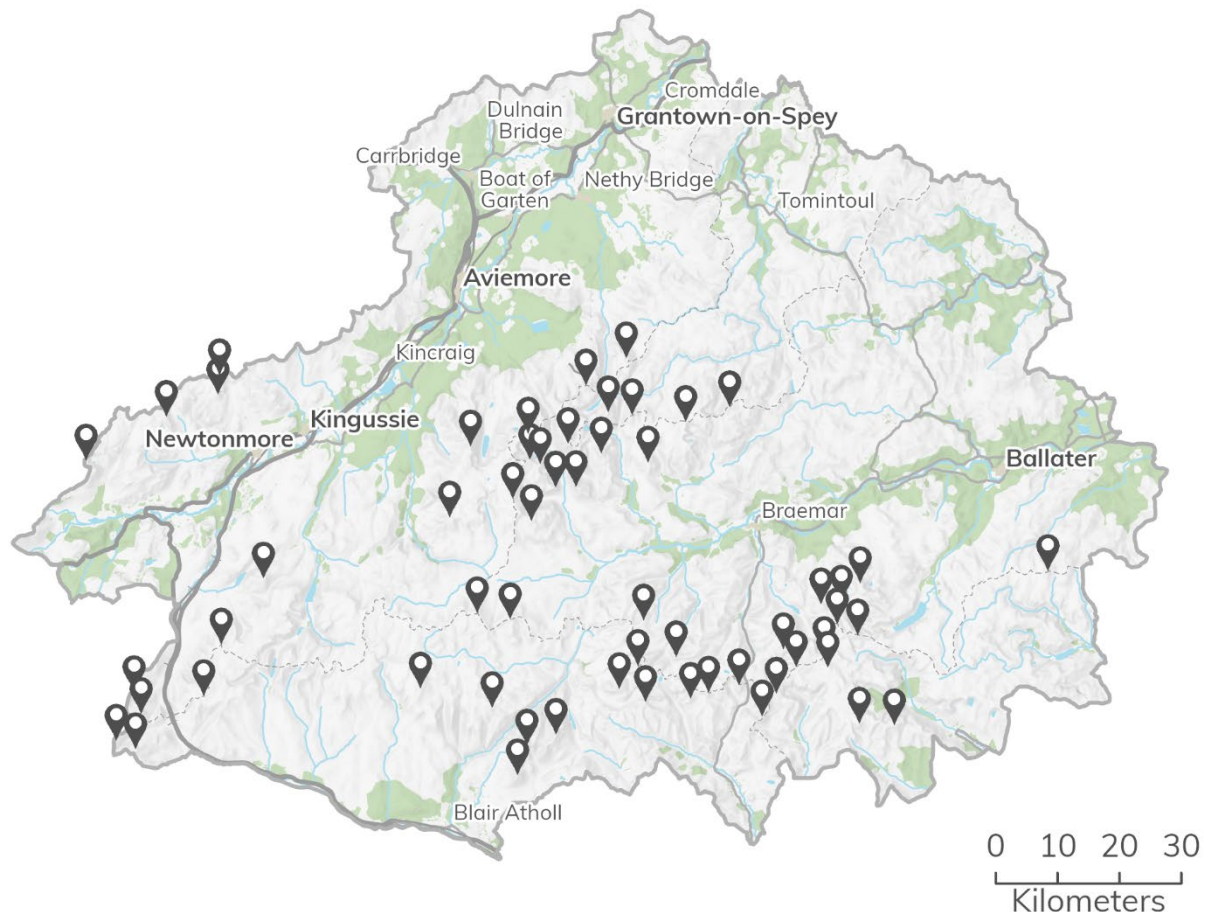


Figure 43 Munros within the Cairngorms National Park. Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2024. All rights reserved. Ordnance Survey Licence number 100040965, Cairngorms National Park Authority.

General information on 'Munro bagging' and routes in the Cairngorms National Park as well as across Scotland can be found here:

- <https://www.walkhighlands.co.uk/munros/>

### Gliding

Cairngorm Gliding Club operates from the Feshie Airstrip at Feshie Bridge, near Kingussie.



## **Fishing**

There are two main rivers in the Cairngorms National Park for fishing namely the River Spey and the River Findhorn. According to the 2019 – 2020 visitor survey, 1% of visitors to the Cairngorms area where there to take part in fishing activities. The most popular locations on the River Spey for fly fishing are at Grantown and Boat of Garten, with accessible riverside posts.

There are also a number of fisheries in the Cairngorms National Park including:

- Craggan Golf Course (near Grantown on Spey) offers stocked trout fishing ponds
- Rothiemurchus Fishing Centre

Loch fishing is also popular in the Cairngorms National Park including Loch Morlich, Loch Dallas, Loch Avon and Loch Vaa. There are also lochs available for coarse fishing. The main Lochs available for coarse fishing are Loch Pityoulish and Loch Insh.

## **Deer stalking and grouse shooting**

The Cairngorms National Park is also a visitor destination for those wishing to partake in grouse shooting and stag stalking. A number of estates in the National Park host these activities including areas around Aviemore, Angus Glens, Royal Deeside, Glenlivet, Atholl and Glenshee.

As well as grouse shooting and stag stalking, many of the estates also offer pheasant and partridge shoots on lower ground, as well as clay shooting.

It is difficult to accurately estimate the socio-economic impact of these activities and the extent to which land within the National Park is managed for these purposes. At a national level, recent work has focused on driven grouse moors<sup>14</sup> and it is estimated that in 2009 grouse moor management and supporting activities made a total Gross Value Added contribution of £23 million to the Scottish economy<sup>15</sup> and could be an important component of some remote and fragile economies. According to CORINE 2018 data, approximately 2,000km<sup>2</sup> (44%) of the Cairngorms National Park's landcover is moorland and heathland (Figure 44), although it is unknown precisely how much is used for

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<sup>14</sup> See <https://www.gov.scot/binaries/content/documents/govscot/publications/research-and-analysis/2020/11/summary-report-socioeconomic-biodiversity-impacts-driven-grouse-moors-employment-rights-gamekeepers/documents/summary-report-socioeconomic-biodiversity-impacts-driven-grouse-moors-employment-rights-gamekeepers/summary-report-socioeconomic-biodiversity-impacts-driven-grouse-moors-employment-rights-gamekeepers/govscot%3Adocument/summary-report-socioeconomic-biodiversity-impacts-driven-grouse-moors-employment-rights-gamekeepers.pdf>

<sup>15</sup> See <https://sefari.scot/document/socio-economic-and-biodiversity-impacts-of-driven-grouse-moors-in-scotland-part-1-socio>



grouse shooting. A methodology for mapping is being developed by the James Hutton Institute which should help fill this information gap<sup>16</sup>.

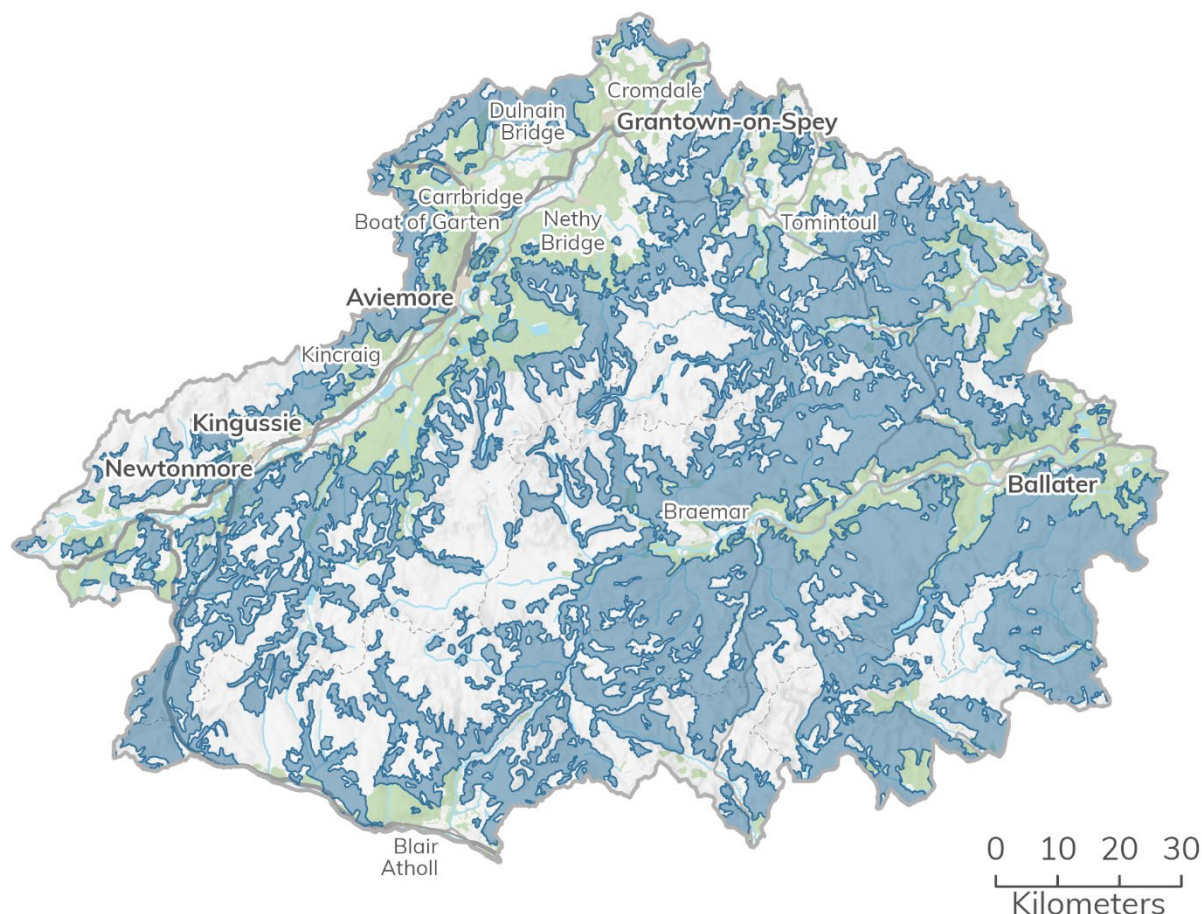


Figure 44 Land identified as moors and heathland within the Cairngorms National Park according to CORINE Land Cover data, 2018. Contains Ordnance Survey data © Crown copyright and database right 2024. Contains data © European Union, Copernicus Land Monitoring Service 2024, European Environment Agency (EEA).

Further matters relating to land use are covered in the Land use, soil and resources section of the evidence report.

<sup>16</sup> See <https://sefari.scot/document/socio-economic-and-biodiversity-impacts-of-driven-grouse-moors-in-scotland-part-3-use-of>



### **Nature-based tourism**

In 2010 it was estimated that that total visitor spending in Scotland attributable to nature-based tourism per year was around £1.4 billion with around 39,000 associated full-time equivalent jobs<sup>17</sup>.

The Cairngorms National Park attracts a significant number of people due to its natural offerings. It hosts a quarter of Scotland's native pine forest, a quarter of the UK's rare and endangered species, and five of the UK's 6 highest mountains. According to the 2019 - 2020 visitor survey, 18% of visitors to the Cairngorms area were there for the wildlife or to take part in bird spotting.

The following destinations cater for nature and wildlife orientated visitors (Figure 45):

- Loch Garten Nature Centre
- Rothiemurchus Centre
- Reindeer Centre
- Glenlivet Estate Office and Information Centre
- Highland Wildlife Park
- The Wildcat Centre
- Ranger centre Glen Clova
- The Virtual lek (Capercaillie) experience at Balmoral
- Glen Tanar Visitor Centre
- Glenmore Visitor Centre.

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<sup>17</sup> <https://www.nature.scot/sites/default/files/2019-07/Publication%202010%20-%20SNH%20Commissioned%20Report%20398%20-%20Assessing%20the%20economic%20impacts%20of%20nature%20based%20tourism%20in%20Scotland.pdf>



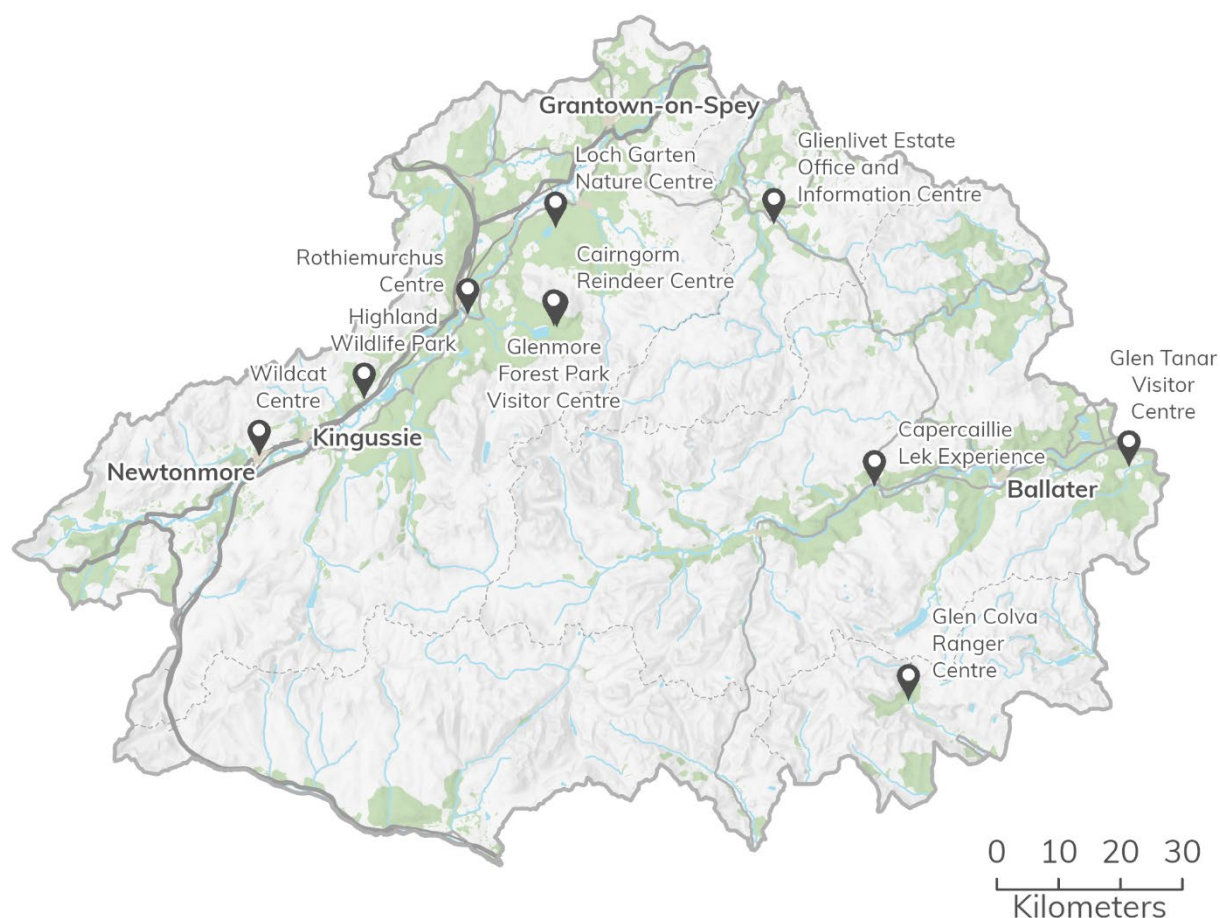


Figure 45 Map of nature orientated visitor centres in the Cairngorms National Park. Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2024. All rights reserved. Ordnance Survey Licence number 100040965, Cairngorms National Park Authority.

### Heritage tourism

According to Historic Environment Scotland, the historic environment generates over £4.4bn a year for Scotland's economy through direct and indirect spend, with £2.5bn generated by repair and maintenance and £1.9bn by heritage tourism<sup>18</sup>.

There are a number of museums and historic buildings to visit in the Cairngorms National Park. According to the 2019 - 2020 visitor survey, heritage destinations, such as castles and museums, were more popular with overseas visitors than those from Scotland and the rest of the UK.

Museums in the National Park include (Figure 46):

<sup>18</sup> <https://app-hes-pubs-prod-neu-01.azurewebsites.net/api/file/4d7ec511-3fde-4235-a8b1-b02a00e751b7>







- Grantown Museum and Heritage Trust
- Highland Folk Museum
- Braemar Highland Games Centre
- Tomintoul and Glenlivet Discovery Centre
- Clan Macpherson Museum
- Old Royal Station, Ballater
- Blair Atholl Visitor Centre
- House of Braur Clan Museum.

Elements of the National Park's built and archaeological heritage are also heritage destinations, benefiting from their own visitor infrastructure. These include (Figure 46):

- Braemar Castle
- Castle Roy
- Blair Castle
- Drumin Castle
- Dalnaglar Castle
- Balmoral Castle
- Ruthven Barracks
- Corgarff Castle
- Blairfindy Castle
- Kindrochit Castle
- Glenbuchat Castle
- Knock Castle
- Old Brig O'Dee
- Carrbridge Packhorse Bridge
- Dun-da-lamh hillfort



### Type of attraction

-  Museum / Visitor Centre
-  Castle / Fortification
-  Hillfort
-  Bridge

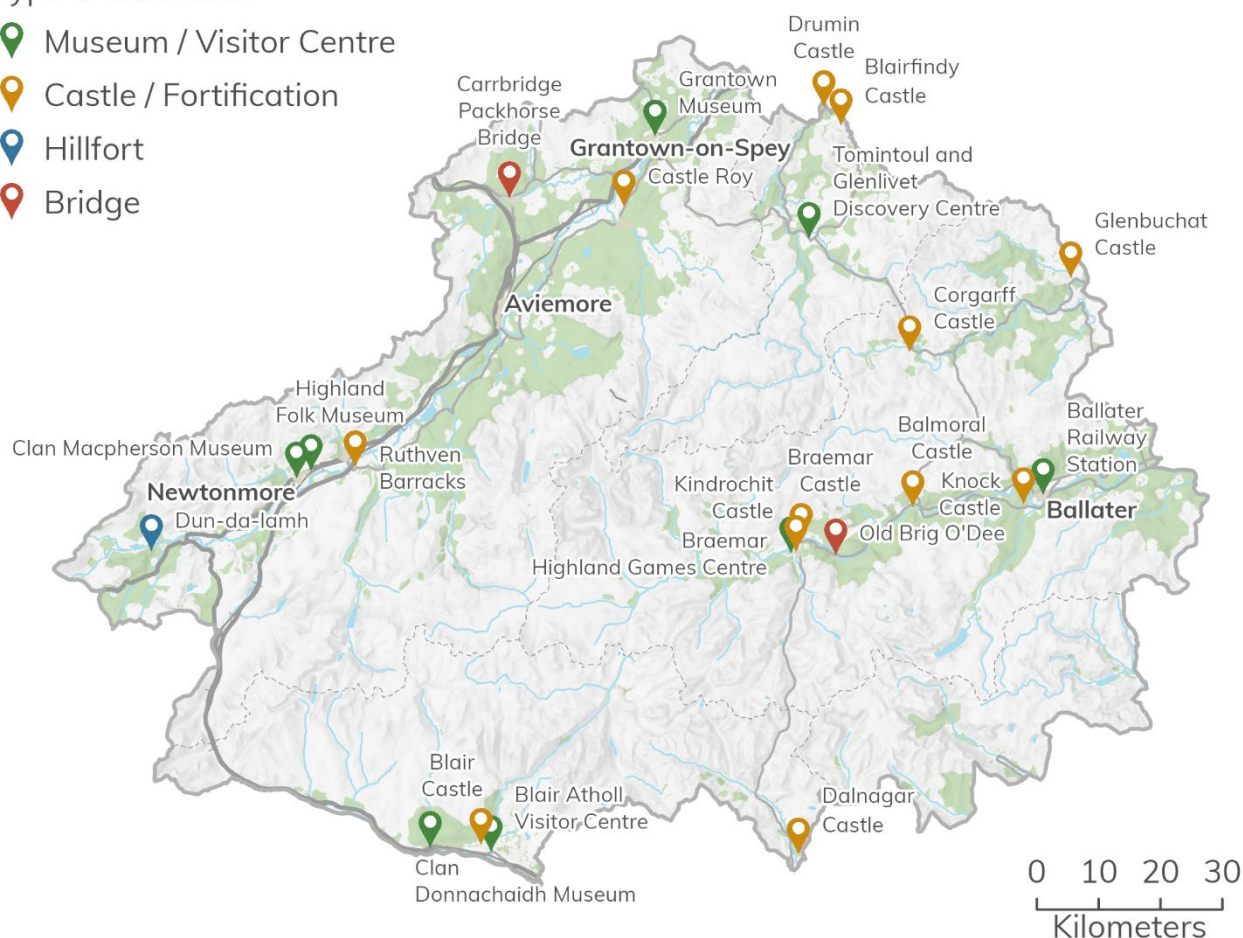


Figure 46 Map of the historic built environment heritage attractions and museums in the Cairngorms National Park. Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2024. All rights reserved. Ordnance Survey Licence number 100040965, Cairngorms National Park Authority.

More information on heritage and culture sites in the National Park can be found in the Heritage Topic paper<sup>19</sup>.

### Strathspey Steam Railway

The heritage train then travels to Boat of Garten and on to Broomhill. The railway takes you on a twenty-mile round trip along part of the original Highland railway mainline. As the train passes moorland, through woods and alongside the meandering River Spey, the magnificent Cairngorm Mountain scenery is ever present.

<sup>19</sup> <https://cairngorms.co.uk/wp-content/uploads/2024/07/Topic-paper-Landscape-Engagement-version.pdf>



More information on current plans to extend the railway will be available in the Sustainable transport section of the Evidence Report.

### **Art and creativity**

With the support of the communities within the Cairngorms National Park, the Park Authority has mapped a Creative Directory which showcases the depth and breadth of creative activity, expertise and resources in the Cairngorms National Park. More than 80 Park creatives including poets, painters, sculptors and storytellers have contributed to the new directory which forms part of the Cairngorms 2030 community arts and culture programme. The map can be accessed here:

- <https://cairngorms.co.uk/working-together/local-business/cairngorms-creative-directory/>

Included on the directory are a number of arts galleries, exhibition spaces and heritage venues in the Cairngorms National Park, which host events and exhibitions, including:

- 1896 Gallery, Boat of Garten
- Boat of Garten Community Hall, Boat of Garten
- The Butterworth Gallery, Tarland
- Cromdale Village Hall, Cromdale
- Eleven41 Gallery, Kingussie
- Fused and Light / Chapel House arts, Kingussie
- Grantown Museum, Grantown on Spey
- The Iona Gallery, Kingussie
- Jeff Buttress, Carrbridge
- Loch an Eilein Gallery, Rothiemurchus
- Niven Photography, Nethy bridge
- Old Post Office and Café, Kincaig
- Spey Bank Studio, Grantown on Spey
- Saint Margaret's, Braemar

### **Distilleries**

In 2022, it was estimated that the Scotch whiskey industry generated £5.3 billion Gross Value Added in Scotland and supported around 41,000 jobs<sup>20</sup>. In the same year Scotch

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<sup>20</sup> <https://www.scotch-whisky.org.uk/media/2170/scotch-whisky-economic-impact-report-2024.pdf>



whisky visitor centres in Scotland received just over 2 million visitors, with a total spend of around £85,000,000. Associated with this visitor offer were 1,174 jobs<sup>21</sup>.

The Cairngorms National Park is home to some world famous for whisky distilleries, with Royal Lochnagar, Dalwhinnie, Cairn Distillery and Glenlivet supporting visitor centres. Others can be visited by appointment. According to the 2019 – 2020 visitor survey, distilleries were more popular with overseas visitors to the National Park than those from Scotland and the rest of the UK.

Distilleries in the Cairngorms National Park include (Figure 47):

- Dalwhinnie Distillery
- Cairn Distillery
- Royal Lochnagar Distillery
- Tomintoul Distillery
- Glenlivet Distillery
- Tomnavoulin distillery
- Braeval Distillery

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<sup>21</sup> <https://www.scotch-whisky.org.uk/newsroom/scotch-whisky-visitor-centres-become-top-visitor-attraction-in-scotland/>



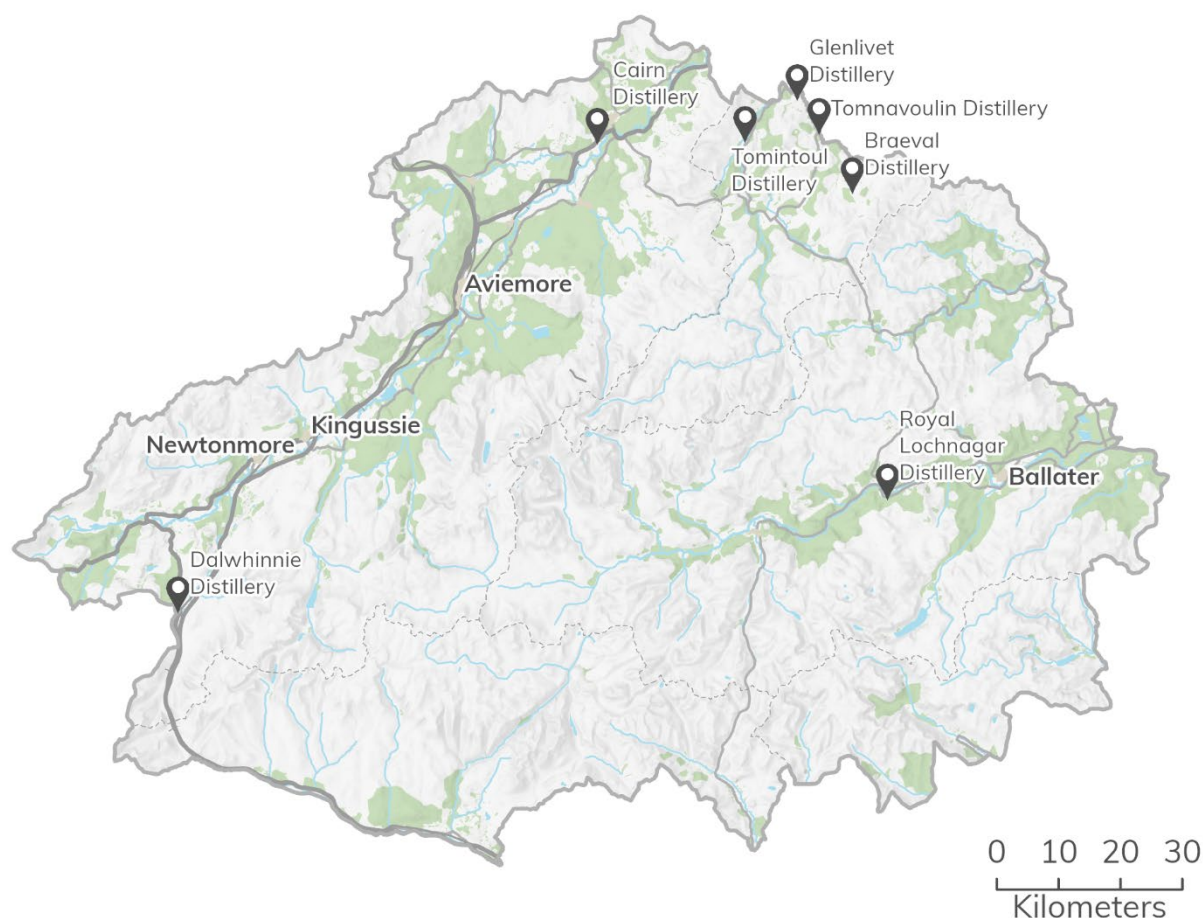


Figure 47 Map of the whisky distilleries in the Cairngorms National Park in 2024. Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2024. All rights reserved. Ordnance Survey Licence number 100040965, Cairngorms National Park Authority.

## Other

### Landmark Forest Adventure Park

Landmark Forest Adventure Park is located in Carrbridge with easy access from the A9. It offers a variety of indoor and outdoor attractions. It offers a range of activities from theme park style rides to nature-based experiences. It is allocated in the current Local Development Plan (see Table 6, page 85).

### Thunder in the Glens

Thunder in The Glens is a gathering of motorcycle enthusiasts, set in the Highland Resort, Aviemore, Scotland. The motorcycle enthusiasts then ride out / and visit through the settlements in the National Park



## Camping

Camping means different things to different people, for some it's hiking off alone into the woods or up a Munro where few venture (wild camping) while for others, it's pitching up in a campsite or caravan park where there are acres of wilderness, but you can still use a toilet, shower, and kitchen.

Camping, and even glamping, has become popular recently as this type of accommodation adopts an 'eco-friendlier' approach. In the Cairngorms National Park, there is a wide range of options from camping pods to campsites hidden in the woods.

According to the 2019 – 2020 visitor survey, approximately 26% of overnight visitors to the Cairngorms area were staying in some form of camping / camp site accommodation (e.g. tent, caravan, motorhome).

## Camp sites

There are a wide range of different serviced camping sites in the National Park, from the large family-friendly sites to intimate quiet spots of the beaten track. Campsites in the National Park include:

- Rothiemurchus Camp & Caravan Site
- Blair Castle Caravan Park
- Oakwood Caravan & Camping Park
- The Lazy Duck Basecamp
- Braemar Caravan Park and Camping Pods
- Badaguish Forest Lodges – Self-Catering Lodges, heated eco camping pods and educational group tent camping
- Glenmore Caravan and Camping site
- Dalraddy Holiday Park
- Cairngorms Motorhome Park
- Camping Pods, Blair Castle Caravan Park
- Kingussie Camping
- Laggan Glamping, Tigh an Each Bed and Breakfast and Laggan CL (Certified Location).
- Ballater Caravan Park
- Glenshee Ski Centre
- Braemar Caravan Park
- Cairngorms Glamping, Strathdon
- Tomintoul Bowling Club Caravan Site





Challenges relating to wild camping exist at certain locations, although the arising issues (e.g. fire risk, litter, etc) fall outwith the remit of the planning system<sup>22</sup>.

### **Motorhomes**

There are currently a number of daytime parking spots across the National Park. Despite this, challenges exist in relation to the use of motorhomes, which could indicate the need for further motorhome stopping sites and waste management facilities as supported by the Cairngorms Sustainable Tourism Infrastructure Development Plan 2023 – 2028.

### **Access and parking**

Access to and around attractions in the Cairngorms National Park and parking associated with tourism in the National Park will be covered in the Sustainable transport section of the Evidence Report.

### **Short-term lets and holiday homes**

Data and information on short-term lets and holiday homes in the Cairngorms National Park will be covered by the Housing section of the Evidence Report.

### **Public toilets**

Information and data on public toilets that support tourism in the National Park will be available in the Services section of the Evidence Report.

### **Land availability**

Within the current Local Development Plan (2021) 134.9ha of land is allocated solely for tourism or visitor infrastructure with a further 33.7ha allocated for mixed use development which may include tourism or visitor uses (Table 6). The majority of sites identify and protect land that is already in use, while 14.6ha is available for future development. Further information about individual sites is presented in the Local Development Plan 2021 and any updates noted in the Local Development Plan Action Programme 2022. Sites will need to be reviewed for their effectiveness during the preparation of the Proposed Plan, while additional sites may also need to be identified.

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<sup>22</sup> See <https://cairngorms.co.uk/help-us-stamp-out-irresponsible-camping/>



Table 6 Land allocated for tourism (including mixed use allocations) in the Local Development Plan 2021.

Settlement	Site reference	Use	Area (hectares)	Available (hectares)
Aviemore	M1 <sup>23</sup>	Macdonald Resort Aviemore	33	0
Aviemore	M2 <sup>24</sup>	Vacant site	0.7	0.7
Ballater	T1	Caravan Park	2.8	0
Grantown on Spey	T1	Caravan Park	11.3	0
Kingussie	T1	Caravan Park	2.7	0
Newtonmore	T1	Highland Folk Museum	20.3	0
Blair Athol	T1	Blair Castle Caravan Park	19.8	3.2
Blair Athol	T2	Caravan Park	0.5	0
Blair Athol	T3	Visitor Gateway	1.8	0
Boat of Garten	T1	Caravan Park	2.2	0
Braemar	T1	Caravan Park	5.5	0.7
Carr-bridge	T1	Landmark Forest Adventure Park	45.2	10
Tomintoul	T1	Camping	2.3	0
Glenmore	T1	Camping	10.4	0
Glenmore	T2	Glenmore Lodge	6.3	0
Coylumbridge	T1	Camping	3.8	0

<sup>23</sup> Mixed use allocation which can support tourism development.

<sup>24</sup> Mixed use allocation which can support tourism development.



## Summary of implications for Proposed Plan

The proposed plan needs to be prepared in accordance with:

- The four aims of the National Park as set out in The National Parks (Scotland) Act 2000), in particular the third and fourth aims; 'to promote understanding and enjoyment of the special qualities of the area by the public 'and, 'to promote sustainable economic and social development of the area's communities'.
- The spatial strategy and principles of National Planning Framework 4.

In its preparation the proposed plan should seek to:

- Support the viability of existing tourist infrastructure and identify land for new sustainable tourism development that supports the visitor economy while also protecting local communities from potentially adverse effects.
- Support the delivery of the Park Authority's Sustainable Tourism Action Plan and Sustainable Tourism Infrastructure Development Plan.
- Align with the projects being progressed through the Cairngorms 2030 programme.
- Facilitate the delivery of sustainable travel infrastructure to support existing and future growth of the tourism sector.
- Support future tourism growth that supports low carbon development with circular economy principles at its heart (Policy 2 of the National Park Partnership Plan). This may include, increasing on-site renewable energy generation tourism sites, supporting existing businesses to reduce energy use, high standards of sustainable design and installation of bike and car charging facilities to visitor hubs.
- Take account of the priorities of community action plans and the recommendations from the latest visitor survey.
- Reflect the importance of the economic contribution of visitors to the overall economy of the Cairngorms National Park.