

Cairngorms National Park Authority

Resident and worker survey 2024-25

Bronwyn.Vermaat@melresearch.co.uk | Elliot.Simmonds@melresearch.co.uk
tel. 0121 604 4664
www.melresearch.co.uk
Somerset House, 37 Temple Street, Birmingham, B2 5DP



Research background

The Cairngorms National Park (the 'National Park') is the UK's largest national park at 4,528km² (6% of Scotland's land mass) and is home to one quarter of the UK's rare and endangered species. Around 18,000 people live in the National Park across the areas of Aberdeenshire, Angus, Highland, Moray and Perthshire, with two million visitors enjoying this special place every year.

The Park Authority is the organisation that was set up to ensure that the unique aspects of the Cairngorms – the natural environment of the National Park, its wildlife, and its people – are looked after, both now and in the future. The Park Authority provides leadership to all those involved in the Cairngorms.

The Cairngorms National Park Authority commissioned M·E·L Research to conduct a survey with those living and working in the National Park in 2024-2025. This survey is intended to establish a baseline, to be repeated every two years, of local sentiment and experience among those living and working in the National Park. This report displays the results to this survey.

Methodology



Survey delivery:

The research was conducted by M·E·L Research's using an online interviewing approach. The survey was set up using M·E·L Research's online survey platform. Links to the survey were distributed by the Cairngorms National Park Authority via its website, social media, local newspapers, posters in local towns and villages, and in communications such as *Cairn* magazine.

All responses once received were checked to ensure their validity, and to remove any duplicate responses.

All participants had the option to take part in a prize draw to win a £100 local shopping voucher.

The survey was open from 17 July 2024 until 31 January 2025.



Results and reporting:

In total, 1,294 responses were received from residents living within the National Park (either as their primary residence, or one of two or more residences, excluding holiday homes), and 63 were received from those who live outside of the National Park.

Responses among residents were weighted by age, using three age bands: 16-34, 36-64, and 65+, against the age profile of the National Park, using data from the 2022 census.

Some results have been benchmarked against external data sources. These are:

- Scottish Household Survey 2023
- Annual Population Survey, July-September 2024
- Community Life Survey, 2023-24
- YouGov public opinion research conducted between July and January 2025

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 - Employment and economic wellbeing
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4. Reflections on the Cairngorms National Park Authority

Demographic information of those who responded



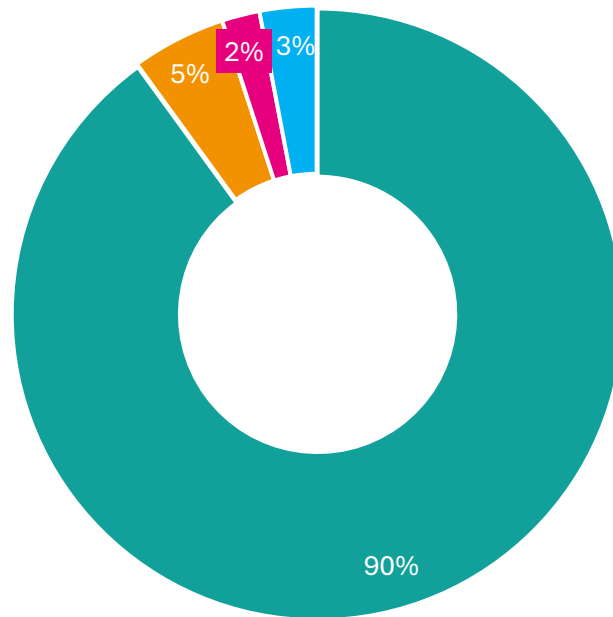
The vast majority of survey respondents were residents of the Cairngorms National Park, who have lived in the National Park for varied lengths of time

95% of all respondents either stated that the National Park was their primary residence or that they split their time between the National Park and somewhere else. These two groups are referred to as 'residents of the National Park' in this report.

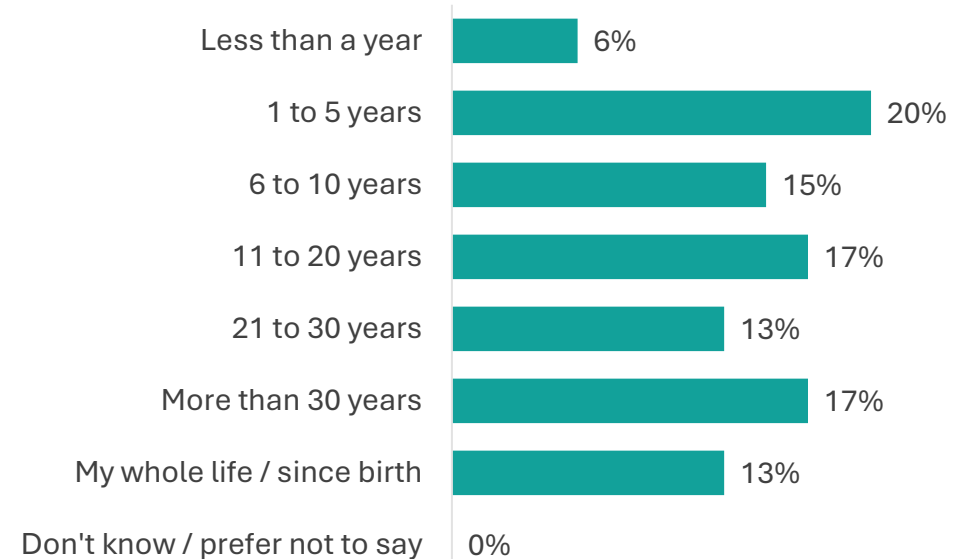
Among these residents, 30% have lived in the National Park for more than 30 years or their whole lives, and 25% for less than five years.

Is your primary residence in the Cairngorms National Park?

- Yes – my primary residence is in the National Park
- I split my time between here and somewhere else
- No – but I have a holiday home in the National Park
- No – I don't live in the area any of the time



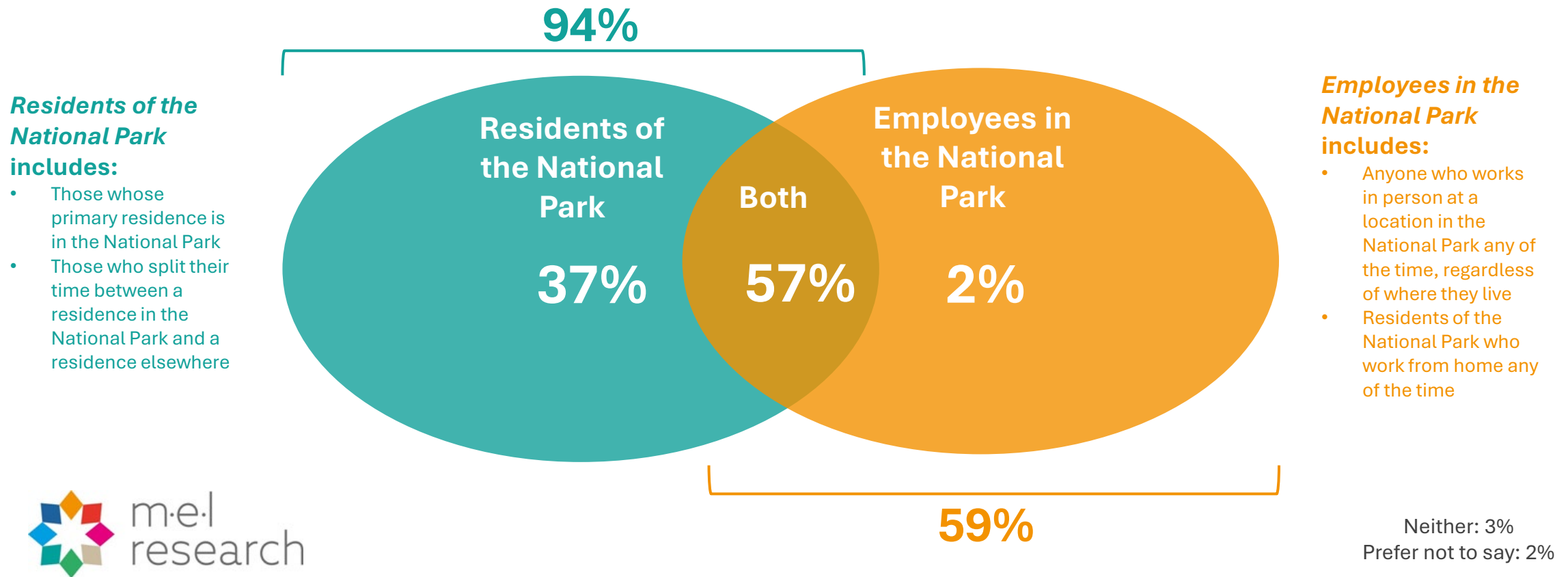
Length of time lived in the Cairngorms National Park (residents only)



Of those who completed the survey, over half (57%) both live and work in the National Park

Meanwhile 37% were resident in the National Park but didn't work within it, and 2% worked in the National Park but didn't live within it. Approaching six in ten (59%) of all respondents work in the National Park. This includes those who work at a location in the National Park, and residents who work from home in the National Park at least some of the time. This group are referred to as "Employees in the National Park" for the rest of this report. Per the previous page, 94% of respondents were residents of the National Park.

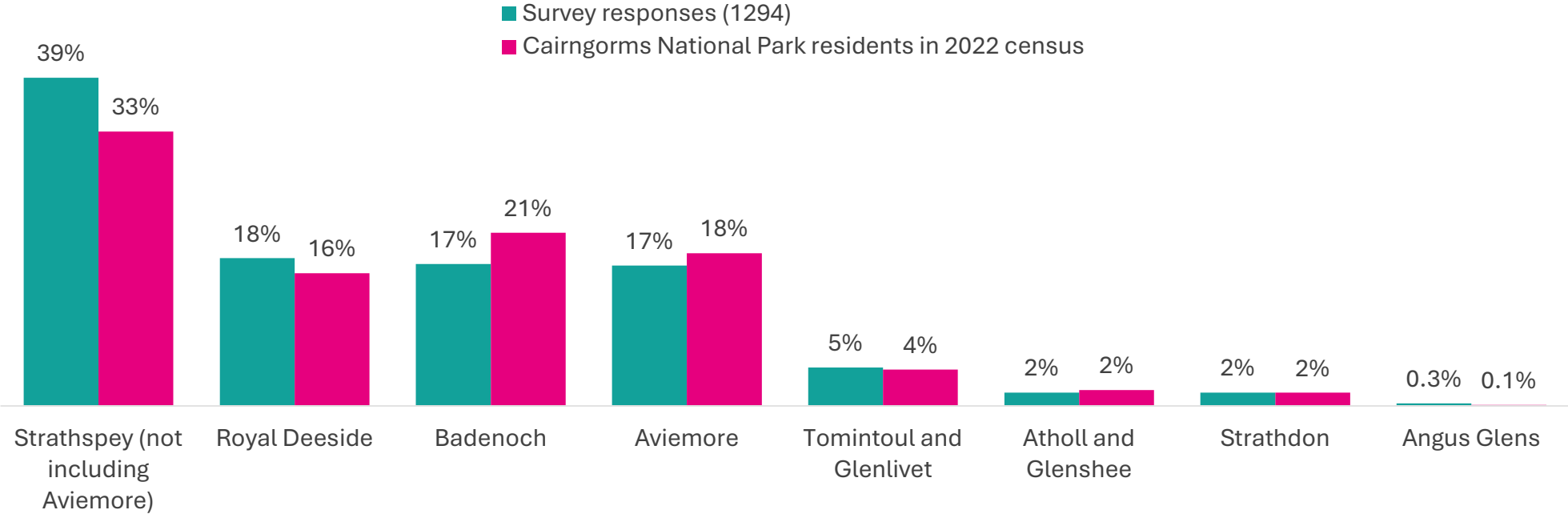
Of all survey respondents, % who are...



Demographic profile: area lived in

Approaching four in ten (39%) respondents live in Strathspey (not including Aviemore), followed by Royal Deeside (18%), Badenoch (17%) and Aviemore (17%). The profile of respondents is similar to that taken from the 2022 Census, with a slightly greater proportion of survey respondents coming from Strathspey (39% compared to 33% in the census), and a smaller proportion coming from Badenoch (17% compared to 21% in the census).

Area of the National Park residents live in



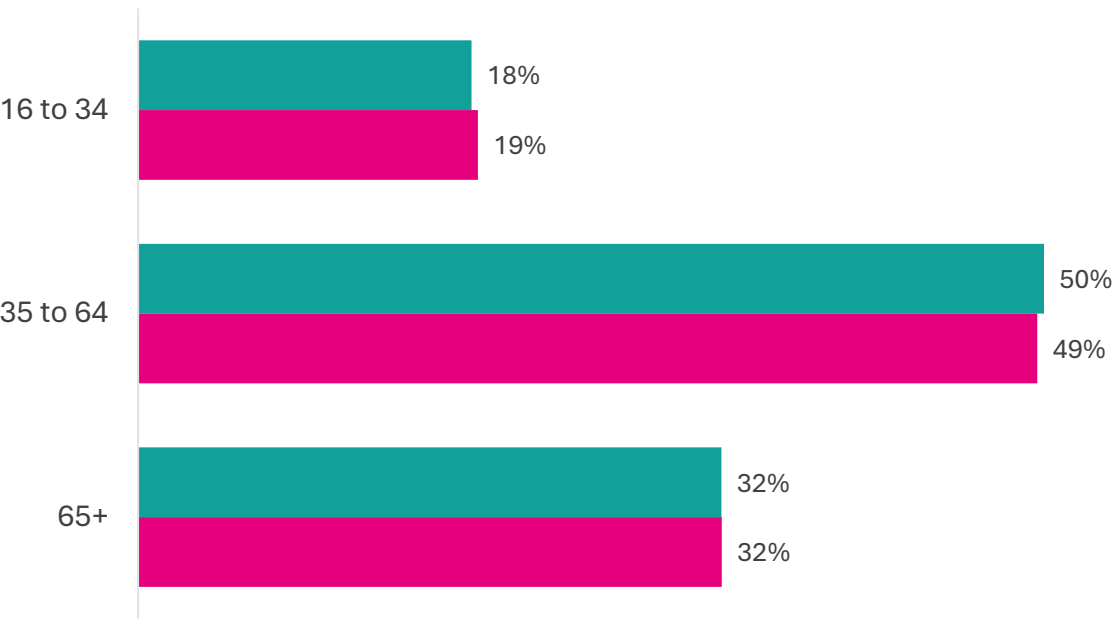
Demographic profile: age

This data was weighted to match the census data available for the National Park, using the categories 16-34, 35-64, and 65+. The below shows the proportion in each age band after weighting was applied.

The age profile of residents of the National Park is younger than the age profile of employees, as would be expected given some residents will be retired.

Age of residents and employees in the National Park

■ Residents of the National Park (1263) ■ Cairngorms National Park residents in 2022 census



Employees in the National Park (817)	
16 to 34	26%
35 to 64	62%
65+	10%

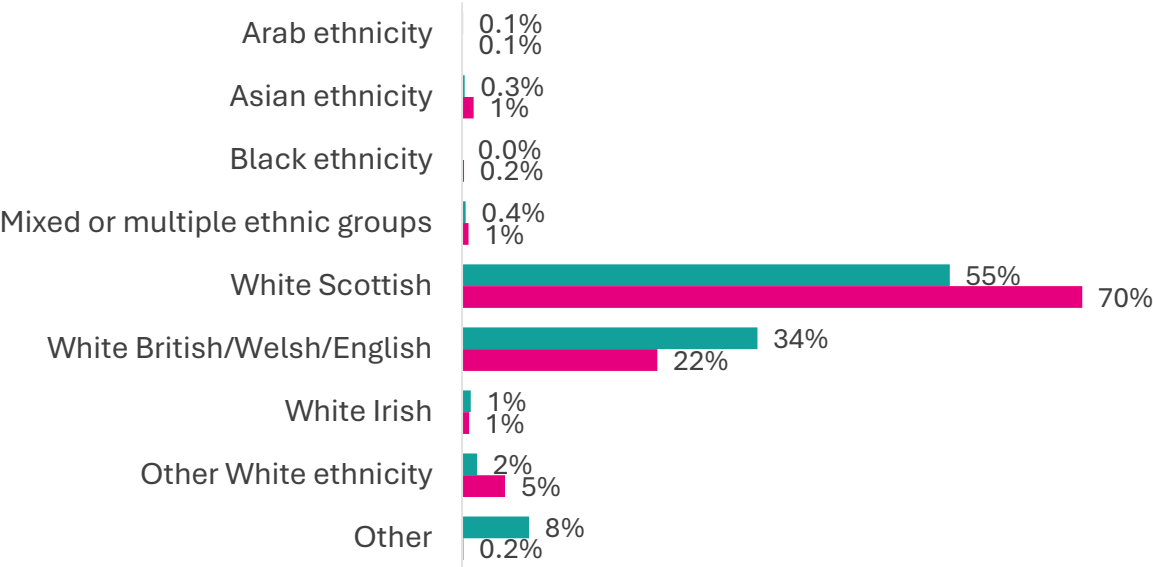
Demographic profile: ethnicity

The vast majority of respondents are of white ethnicity, with 52% of residents White Scottish and 25% White British. When comparing these results to the census, it should be noted that the option for ‘White British/Welsh/English’ is combined from three separate options: White British, White Welsh, and White English, in the resident survey, whereas in the census it is one option ‘Other White British’. This may account for some of the difference between the two datasets.

6% of residents identified with another not listed ethnicity, and 4% selected prefer not to say. Among those who selected other, responses included other European ethnicities, some who identified as Scottish, and other ethnicities from Asia and the Americas

Ethnicity of residents and employees in the National Park

■ Residents of the National Park (1232) ■ Cairngorms National Park residents in 2022 census



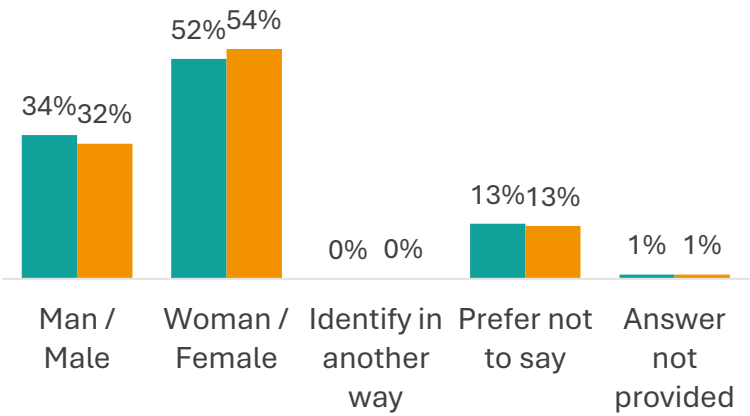
Employees in the National Park (797)	
Arab ethnicity	0.0%
Asian ethnicity	0.4%
Black ethnicity	0.0%
Mixed or multiple ethnic groups	0.4%
White Scottish	57%
White British/Welsh/English	32%
White Irish	1%
Other White ethnicity	2%
Other	7%

Demographic profile: sex and gender (coded from free text answers)

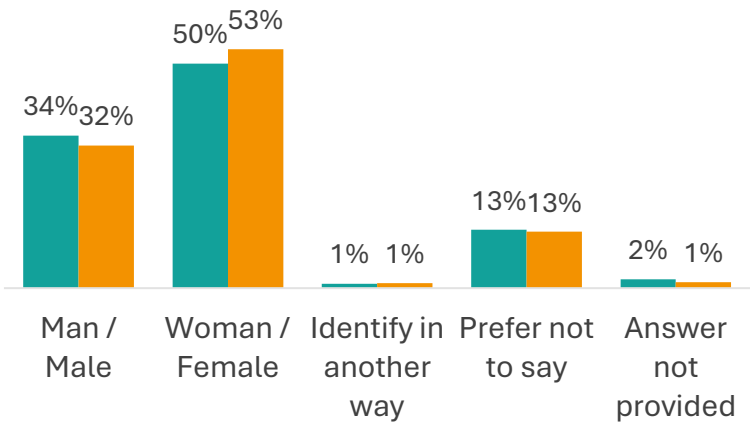
Respondents to the survey were asked to write in their sex and gender in a free text box. These responses were then coded into categories, which are displayed below. It should be noted – when comparing with the census – that the census presents respondents two options to chose from. More residents identified their sex and gender as female (52% and 52% respectively) than male (34% for both), with a similar pattern identified among employees in the National Park. However, it is of note that 13% preferred not to provide their sex and / or gender.

Cairngorms National Park residents in 2022 census	
Male	49%
Female	51%

Sex of residents and employees (coded from free text answers)



Gender of residents and employees (coded from free text answers)



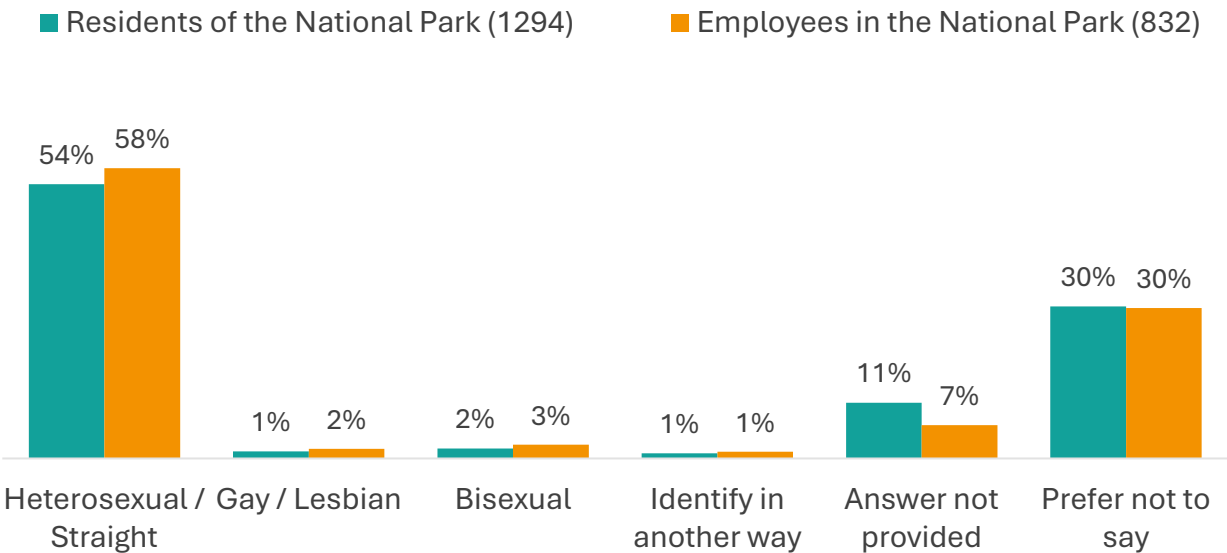
■ Residents of the National Park (1294)

■ Employees in the National Park (832)

Demographic profile: sexual orientation

Respondents to the survey were asked to write in their sexual orientation in a free text box. These responses were then coded into categories, which are displayed below. Results from the census for sexual orientation have not yet been released for the National Park area, so the table below shows the sexual orientation of the Scottish population as a whole. It should be noted that, although 41% of residents didn't provide an answer at this question, the proportion identifying as gay or lesbian (1%), bisexual (2%) or in another way (1%) are close to the figures reported in the census nationally.

Sexual orientation of residents and employees (coded from free text responses)

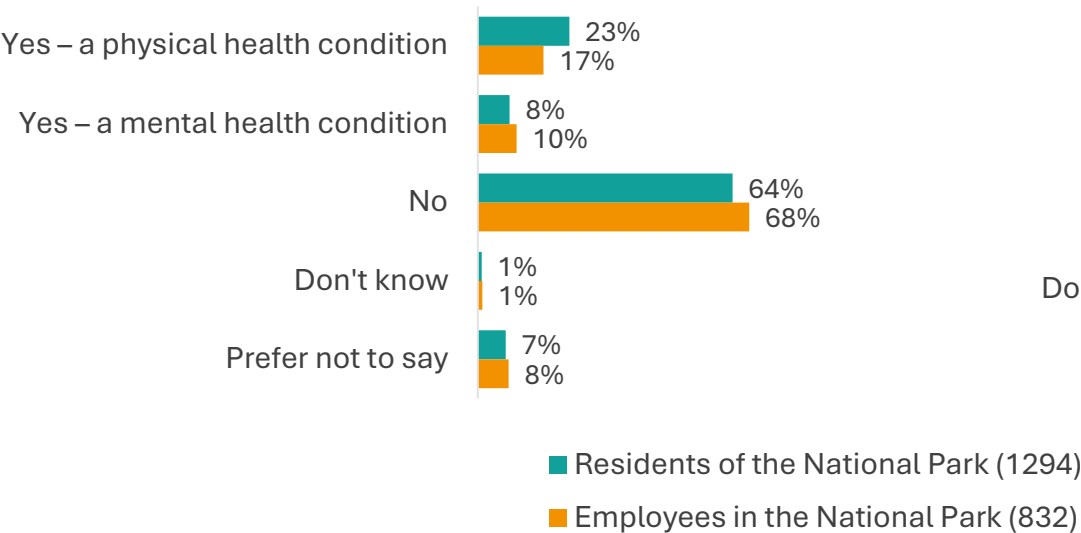


Scottish residents in 2022 census	
Heterosexual/Straight	88%
Gay or Lesbian	2%
Bisexual	2%
Other sexual orientation	1%

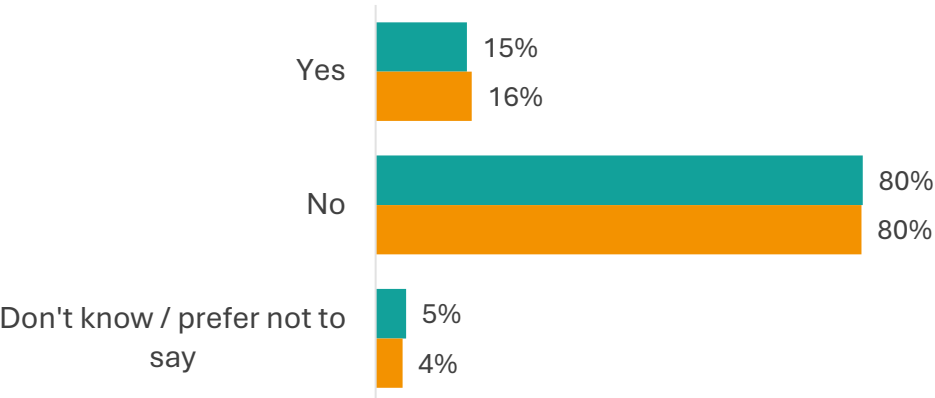
Demographic profile: health conditions and caring responsibilities

28% of residents and 23% of employees in the National Park have a physical or mental health condition, while 15% of residents and 16% of employees have caring responsibilities. In the 2022 census, 11% of Scottish residents stated that they were unpaid carers, and 21% that they had a long-term health condition. However, it should be noted that the census questions were asked in a slightly different format to those in the survey, thus comparisons should be treated with caution.

Have a physical or mental health condition or illness expecting to last 12 months or more



Have any caring responsibilities



About residents and employees in the National Park



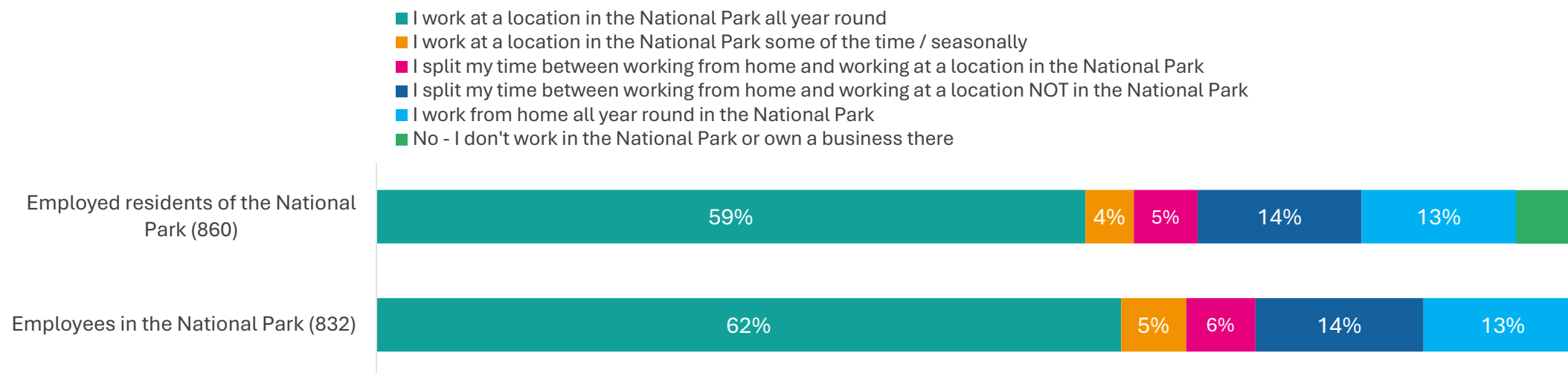
Employment and economic wellbeing

The majority (95%) of employed residents work within the National Park

Six in ten (61%) work at a location in the National Park all year round, while 26% work from home in the National Park, either solely, or in combination with working at a location outside of the National Park. 5% of those who live primarily in the National Park work in a hybrid set up, where they split their time between working at a location in the National Park and working from home. With residents of the National Park tending to also work within it, the economic role that the National Park plays as a job provider is also therefore key to residents' lives.

Among all of those who work in the National Park – regardless of whether they also live there – 62% work on location within the National Park, and 5% work in the National Park seasonally.

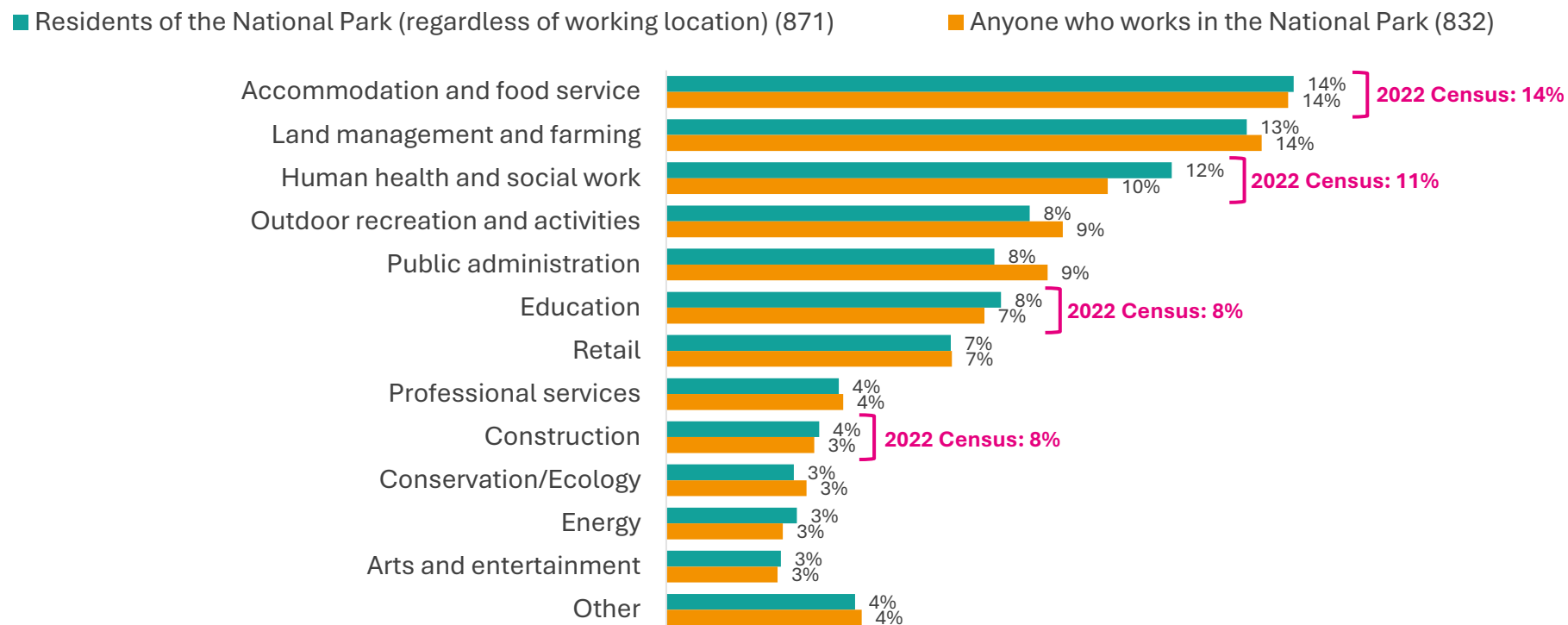
Working arrangements of employed respondents, split by respondent type



The most common sectors of employment among residents and employees are accommodation and food service, land management, and human health and social work

These are also the sectors that employees in the National Park more widely tend to work for. The chart below also displays the proportion of those in the National Park who stated that they worked in certain sectors in the 2022 census, however this is only presented for sectors which are asked in the same way in both the survey and the census. However due to the differences in wording of other sectors, these comparisons should only be taken as indicative.

Employment sector, showing results for residents and employees in the National Park



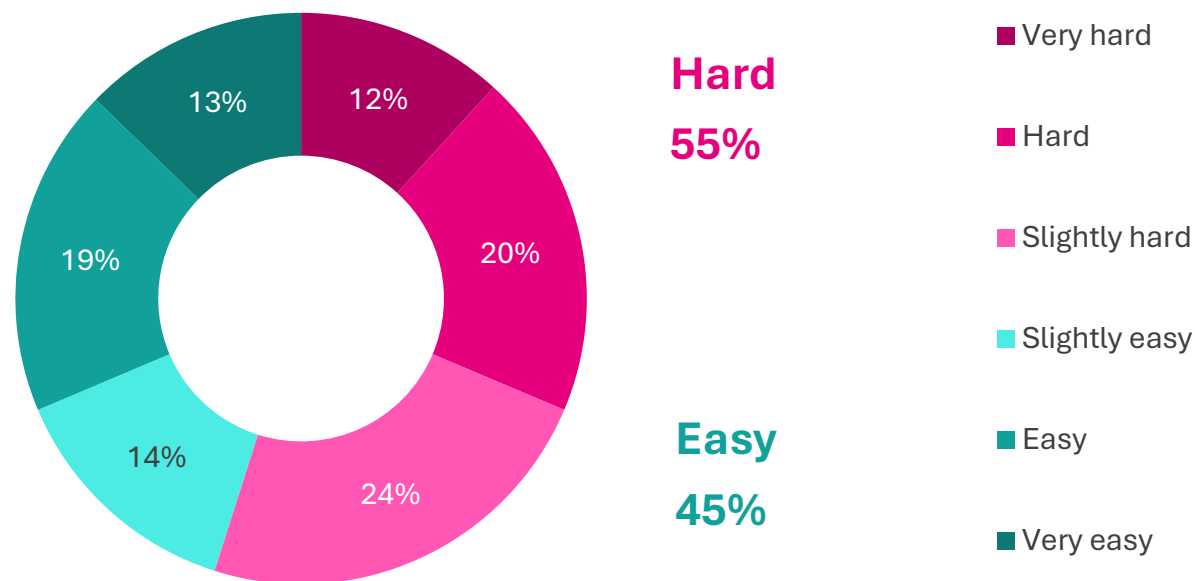
Some report challenges in finding work in the area. Similar proportions of residents found it hard (55%) as found it easy (45%) to find suitable jobs in the National Park area

The same proportions of employees in the National Park found it hard (55%) or easy (45%) to find a job as the proportion of residents who stated this.

Residents who were more likely to state that it was hard for them to find a suitable job in the National Park area include:

- Residents who work from home in the National Park (73%).
- Those employed in the Education sector (72%).
- Those aged 16-34 (64%) or 35-44 (63%).
- Those who do not receive the Real Living wage (65%).

How easy or hard was it to find a suitable job in the National Park area?
(Residents of the National Park, excluding those who selected 'Not applicable')

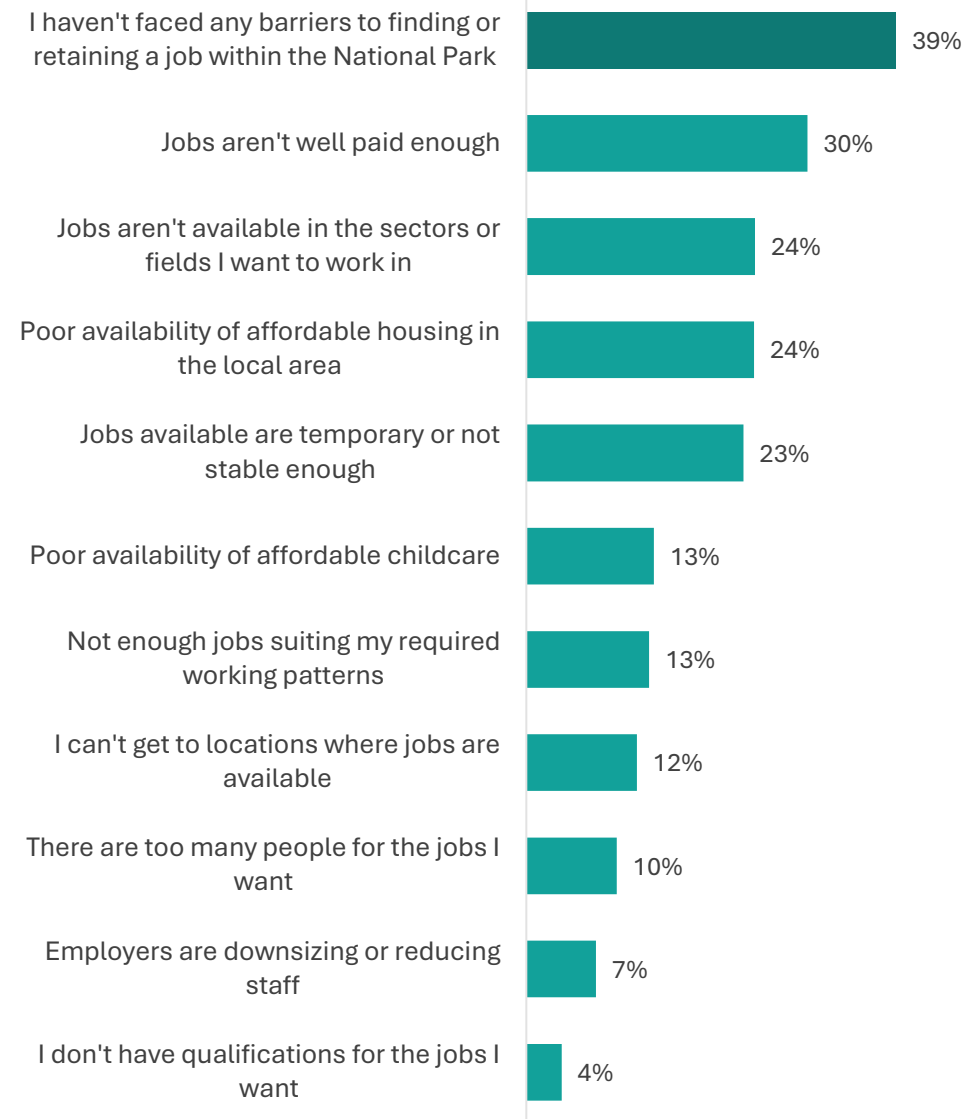


Further, of the residents who have tried to find work in the National Park, 61% have faced barriers when doing so, with jobs not being well paid enough the most common barrier faced (30%)

Among residents, this rises to 68% of those who have lived in the National Park for less than 5 years, 73% of those aged 16 to 34, 71% of those aged 35-44 and 71% of those aged 45-54, highlighting the greater barriers to accessing work that are faced by younger residents and those newer to living in the National Park.

Those aged 35-44 and 45-54 are more likely to face challenges in relation to there not being enough jobs suiting their required working patterns (17% and 16% respectively) and poor availability of affordable childcare (20% and 14% respectively).

Residents living in Aviemore are more likely to say that jobs are not well paid enough (28%), while those in Royal Deeside are more likely to say they can't get to locations where jobs are available (10%).

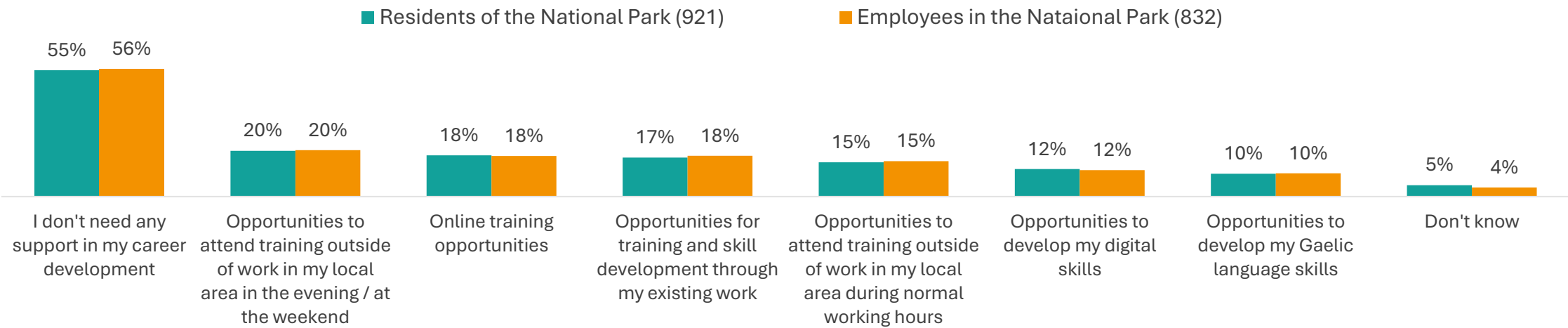


E2. Have you faced any of the following barriers to finding or retaining a job within the National Park? Sample base size: 853, showing data for residents who stated they had looked for a job. Results are shown as % of residents, excluding those who selected "Not Applicable", who numbered 37% of all respondents

Four in ten (40%) residents who are employed, in training or unemployed would benefit from support in their career development. Most commonly this is through training opportunities to attend training outside of work in the evening / weekend (20%), online training opportunities (18%) or training through work (17%)

Support in career development is particularly desired by those who work in person at a location in the National Park (43%), with a particular interest in attending training through their existing work in normal working hours (21%) and in their local area in the evenings and weekend (22%).

Support desired for career development, showing results for residents and employees in the National Park

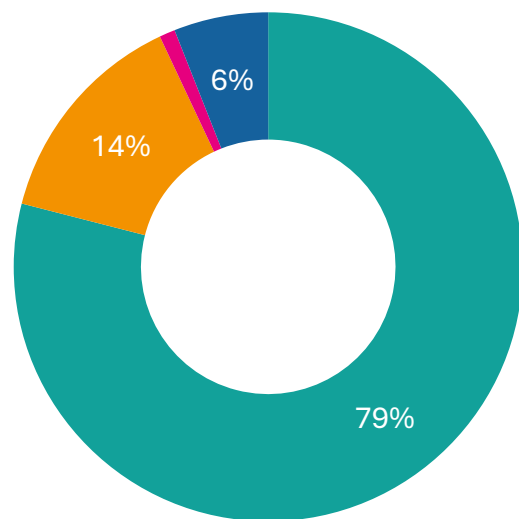


Eight in ten (79%) residents and employees receive the Real Living Wage

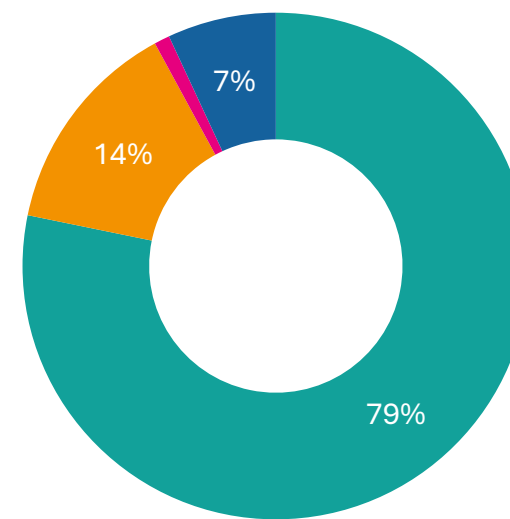
Residents who work part time (19%) or are self employed (33%) are most likely to not receive the Real Living Wage, as are those who work in retail (31%), or who have lived in the National Park for 21-30 years (18%) or for 30+ years (19%). It is therefore apparent that – while newer residents face greater difficulty finding a job in the first place – longer-term residents are more likely to face challenges with the financial remuneration of the job that they hold.

Receive at least the Real Living Wage

Employees in the National Park
(832)



All employed residents
(860)

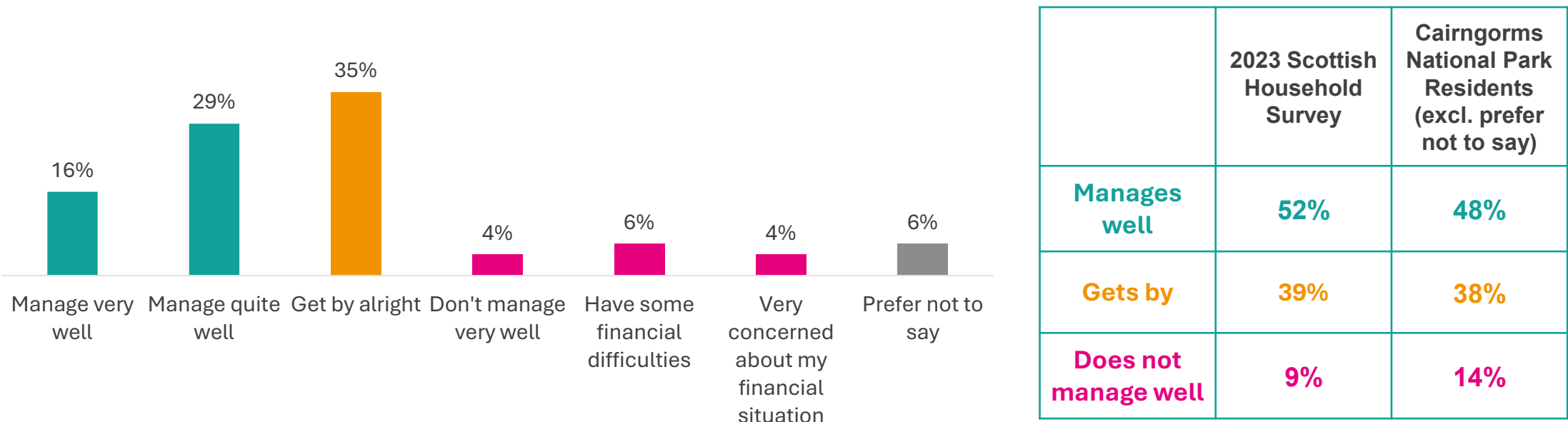


- Yes
- No
- Don't know
- Prefer not to say

The majority of residents are getting by at least ‘alright’ financially (80%); however, 14% report that they are concerned, having financial difficulties, or are not managing well

The proportion who are not managing well is higher than in the latest national data in the Scottish Household Survey (14% cf. 9%); however, it should be noted that this data was collected in 2023, so may not be reflective of the current national picture, given the increase in the cost of living in Scotland in 2024.

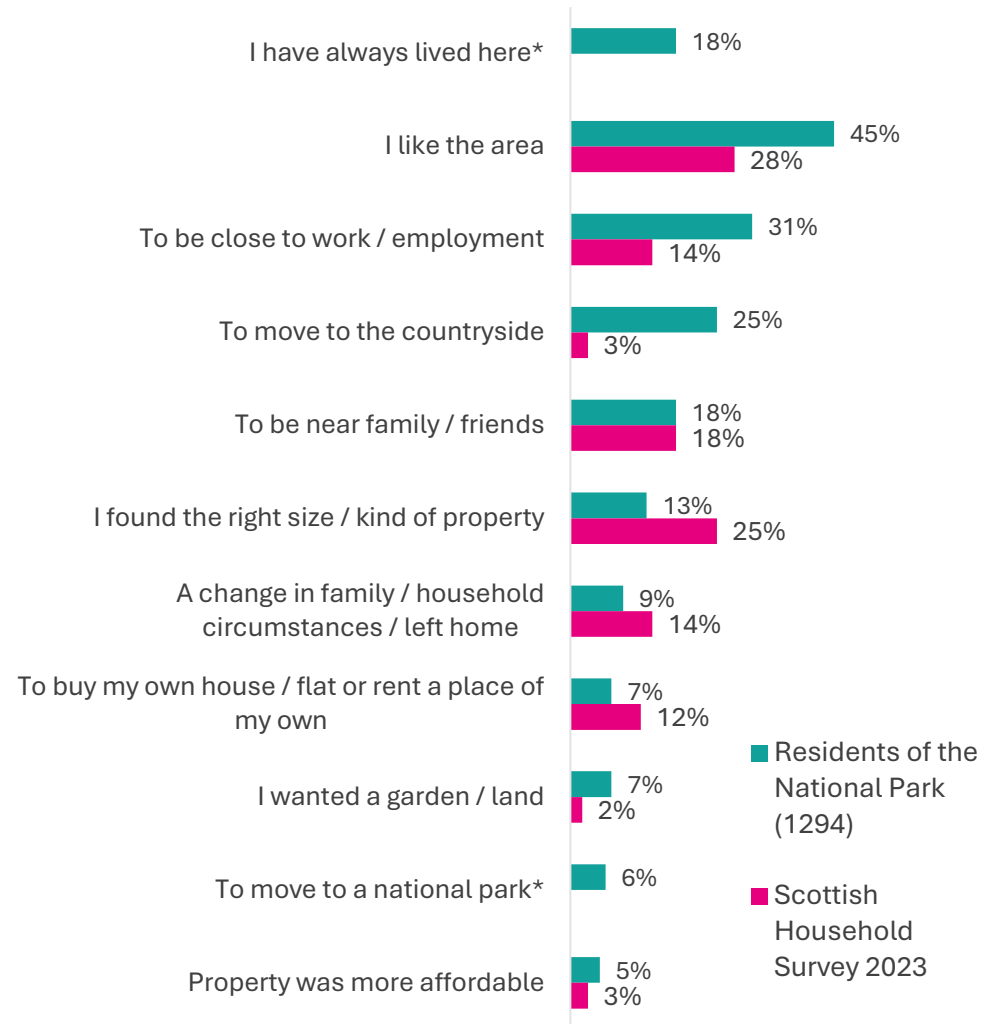
Residents who have moved to the National Park in the last five years (18%) or have lived in the National Park their whole lives (20%), those who work in person at a location in the National Park (19%), are self employed (23%), are aged 16 to 34 (25%) or 35 to 44 (28%), or are not earning the Real Living Wage (34%) are most likely to feel that their household is not managing well.



Housing



Reason for moving to the area residents live in



Affinity for their local area is a key driver of decisions over where to live for National Park residents

Residents of the Cairngorms National Park most commonly chose to move to the area in which they live due to a liking of the area (45%), being close to employment (31%), and a desire to move to the countryside (25%).

This compares to the Scottish Household Survey, which in 2023 found that 28% of Scottish residents moved to the area they live in because they like the area. This difference highlights the strong affiliation and fondness that residents in the National Park have with the area they live in, relative to others in Scotland.

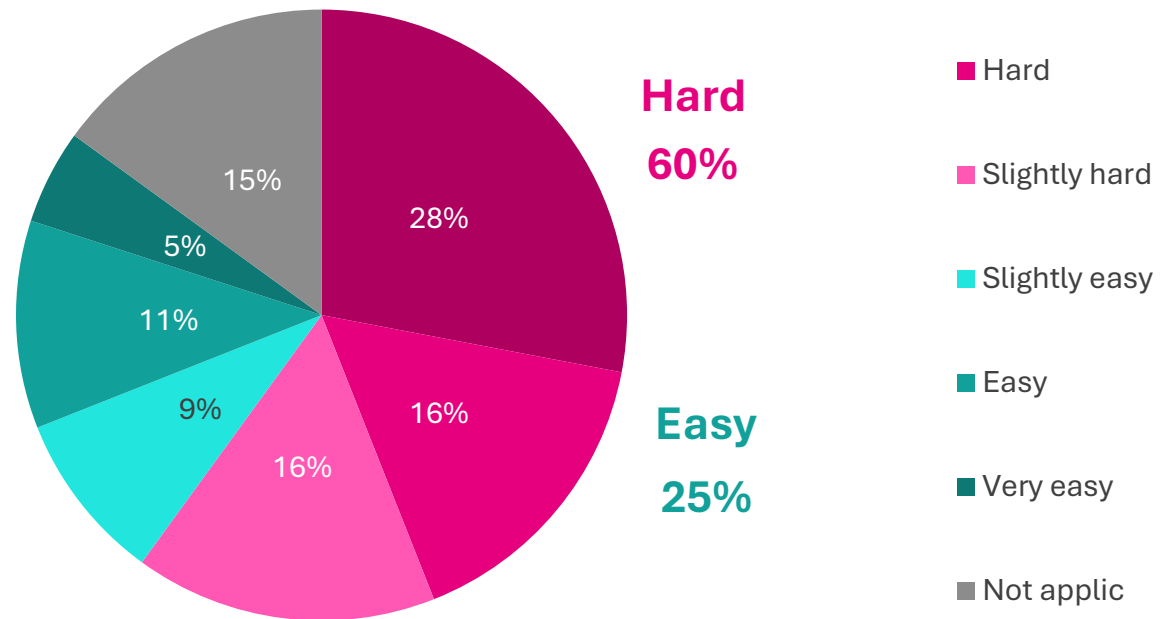
Respondents to the Scottish Household Survey in 2023 were more likely to have chosen where they live due to finding the right / size of property (25%) than National Park residents (13%). This could suggest that residents in the National Park are having to make greater sacrifices in the type of property they live in. However, it could also be that location is of greater importance to residents in the Cairngorms National Park, with the size and type of home a secondary consideration.

Finding suitable housing is one of the key challenges faced by National Park residents. Six in ten (60%) report that they found it difficult to find an affordable place to live in the Cairngorms National Park

The challenge of finding affordable housing is likely to have wide-ranging impacts on the lives of residents, if they are unable to find somewhere suitable to live which gives them access to economic opportunities.

Some resident sub-groups face greater difficulty finding affordable housing. Residents aged 16 to 34 (77%), 35 to 44 (78%) and 45 to 54 (71%) are more likely than those aged 55 to 64 (55%) and 65+ (42%) to have found it hard to find an affordable place to live. By gender, female residents were more likely to find it hard (64%) than male (54%) residents. Those who identify as heterosexual (60%) were less likely to find it hard than other sexual orientations (78%). Those who do not earn the Real Living Wage were also more likely to find it hard (70%) compared to other residents.

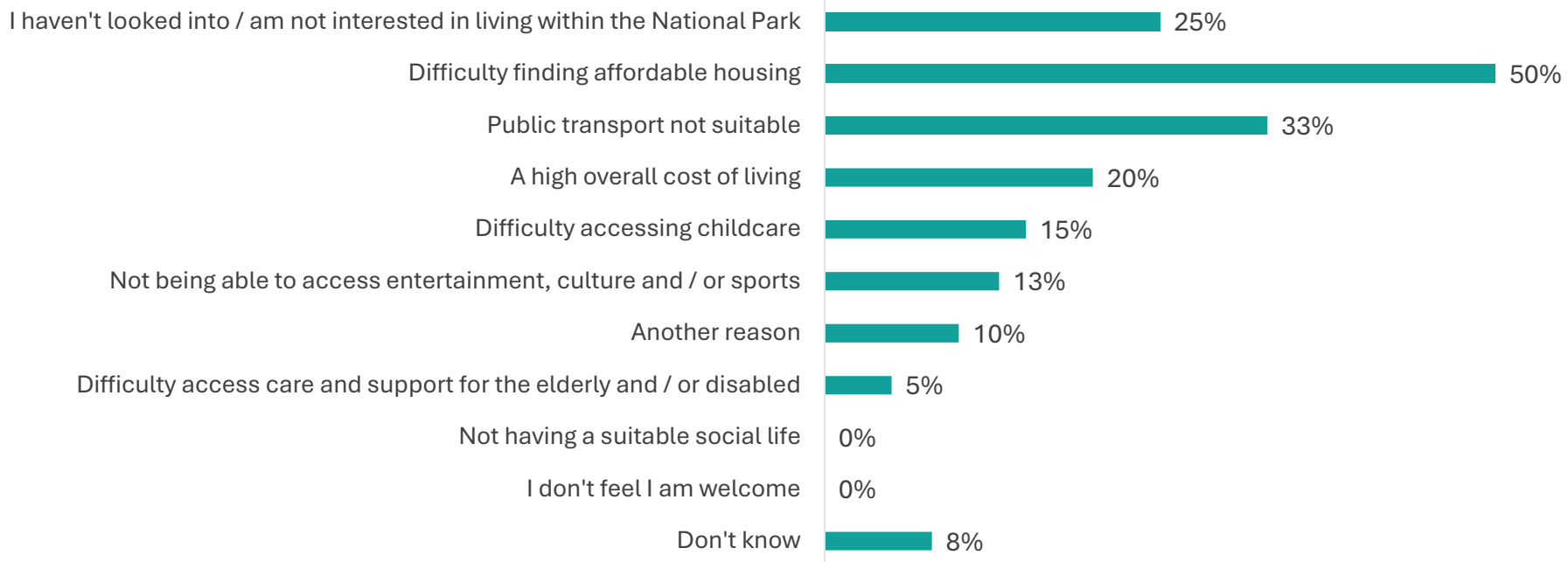
Ease or difficulty among residents of finding an affordable place to live within the National Park



Among those who live outside of – but work within – the National Park, 50% report difficulties finding affordable housing as a reason for not living with the National Park

While 25% of this group state they haven't looked in to or are not interested in living within the National Park, these results suggest many who would like to live in the National Park off are put off, or unable to, due to the lack of affordable housing. Other reasons putting this group off living in the National Park include public transport not being suitable (33%), and a high overall cost of living (20%). However, it should be noted only 40 people answered this question.

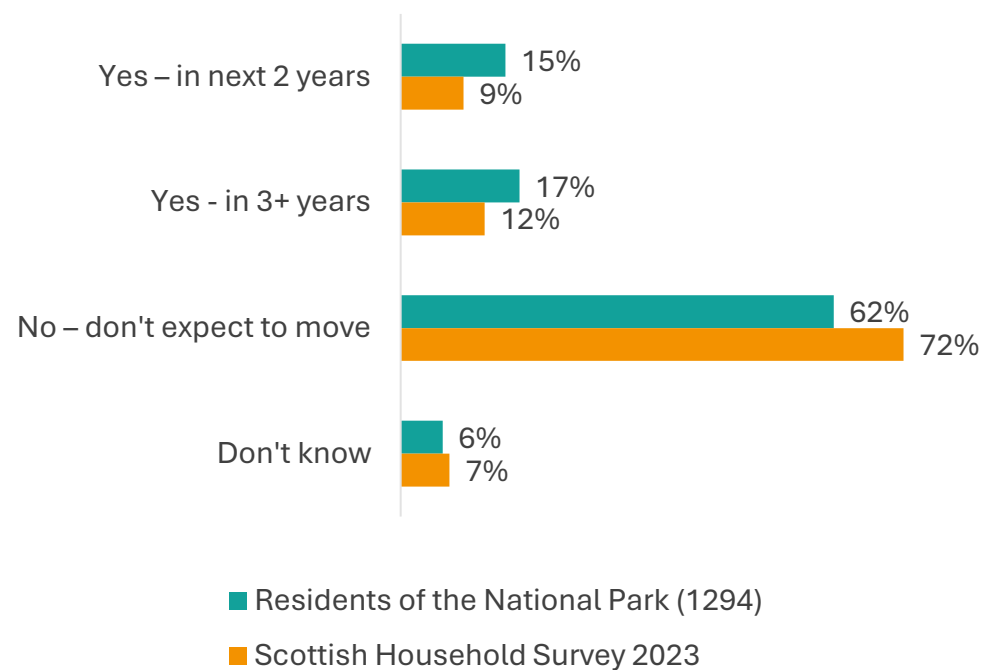
Reasons preventing non-residents from living within the National Park



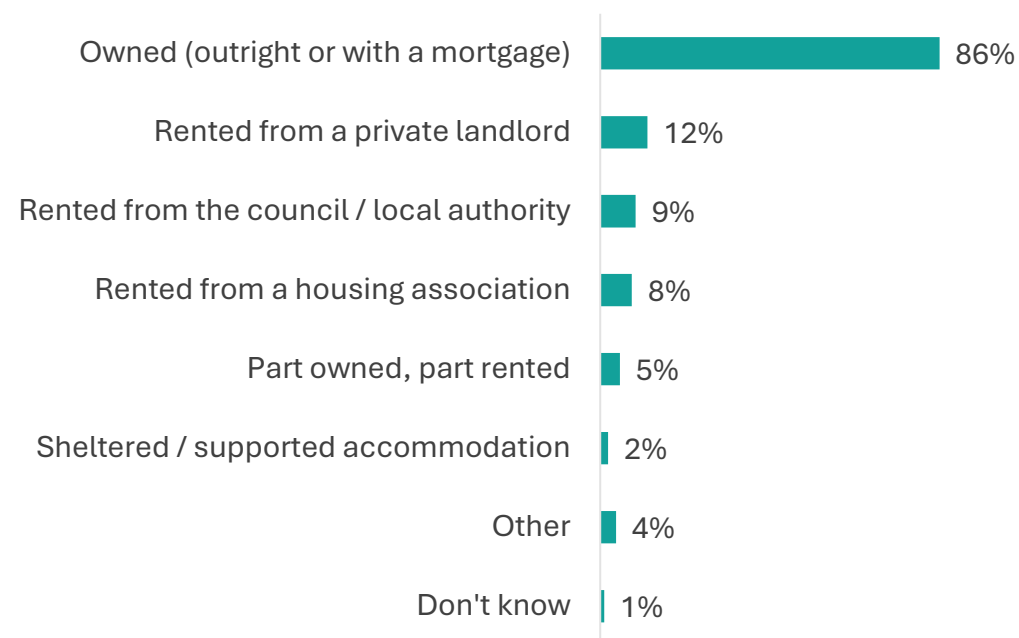
One third (32%) would like to move in the next few years, compared to 21% of residents across Scotland in the Scottish Household Survey 2023

Among those who would like to move, there is a greater preference for owning their property outright (86%) than other types of tenancy.

Would residents like to move from their home in the next few years

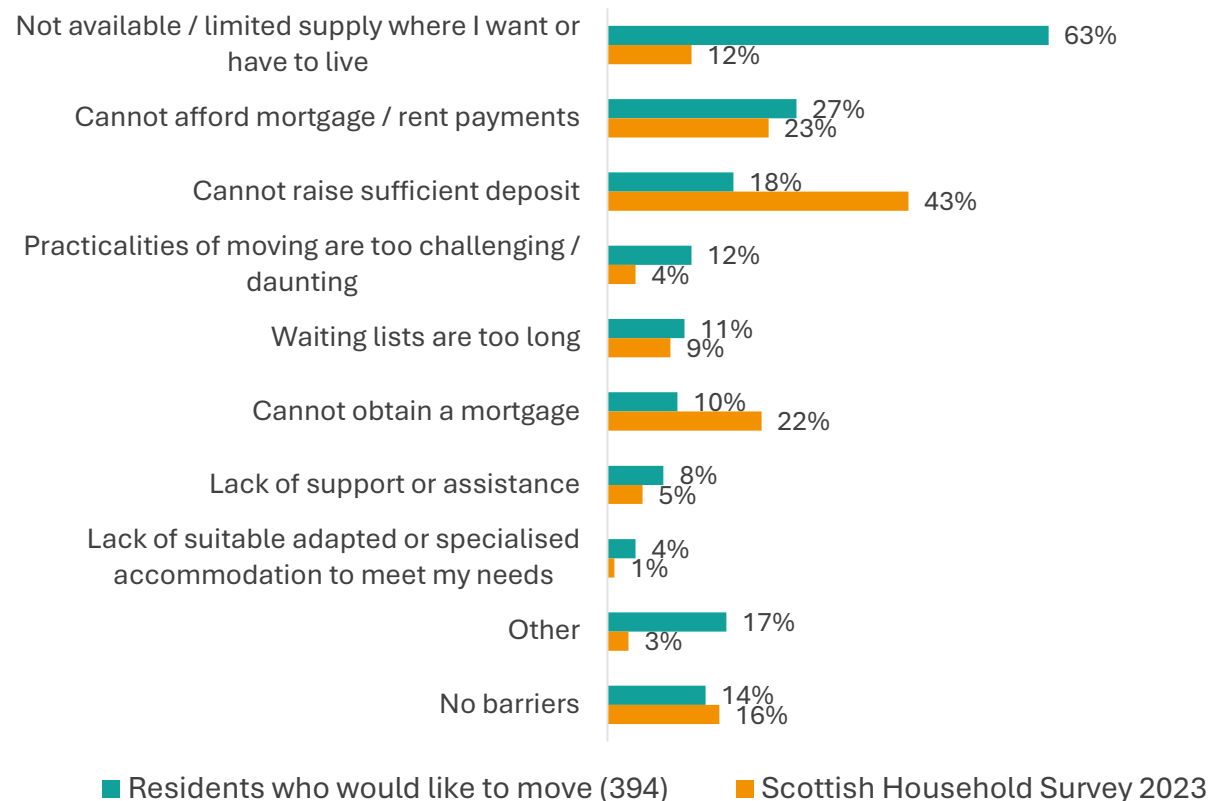


Preferred property type among residents who would like to move home



A low supply of housing is the primary barrier to moving into their most preferred accommodation for National Park residents who would like to move

Barriers residents face to moving



This highlights the prevalence of this issue within the National Park, as it compares to only 12% who stated it was the case in the Scottish Household Survey 2023.

The greatest barrier to moving identified in the Scottish Household Survey was being unable to raise a sufficient deposit (43%); however, only 18% of National Park residents stated this. There were, however, some groups of residents who were more likely to cite this as a barrier they faced, including 26% of those who have moved to the National Park in the last five years, 30% of those who have lived in the National Park since birth, 26% of those who work in person at a location in the National Park, and 35% of those aged 16 to 34.

These groups were also more likely to state that an inability to afford mortgage or rent payments is a barrier to moving, including 43% of those aged 16 to 34, 36% of those who work in person at a location in the National Park, 34% of those who have lived in the National Park for less than five years, and 42% of those who have lived in the National Park since birth.

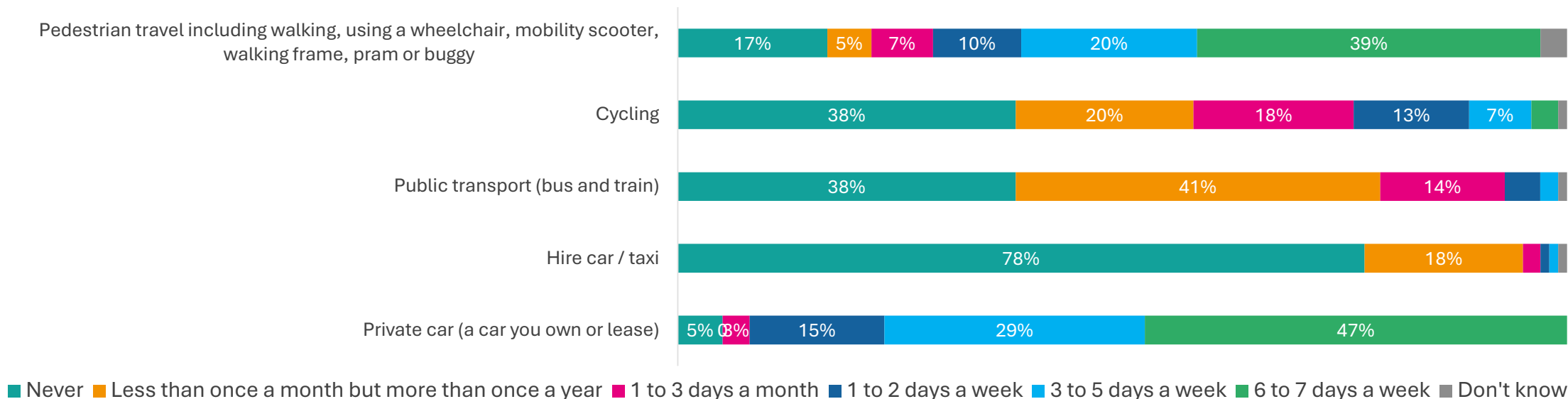
Local facilities and transport



While most residents use a private car at least once a week (92%) and 69% walk at least once a week, only 6% use public transport and 23% cycle this frequently

These results suggest that there is more that could be done to encourage usage of public transport within the National Park, something which we understand is a core focus of the Cairngorms 2030 programme.

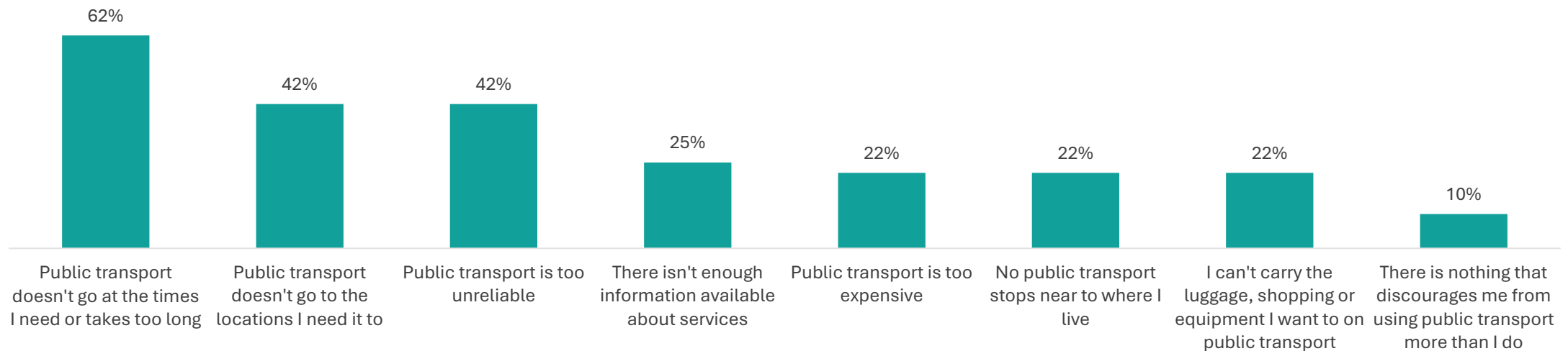
Frequency with which residents use...



The most common reason given – by both residents and those living outside the National Park – for not using public transport is the length or timing of journeys

Improving the frequency and destinations of public transport routes could therefore help to improve the usage of public transport in the National Park.

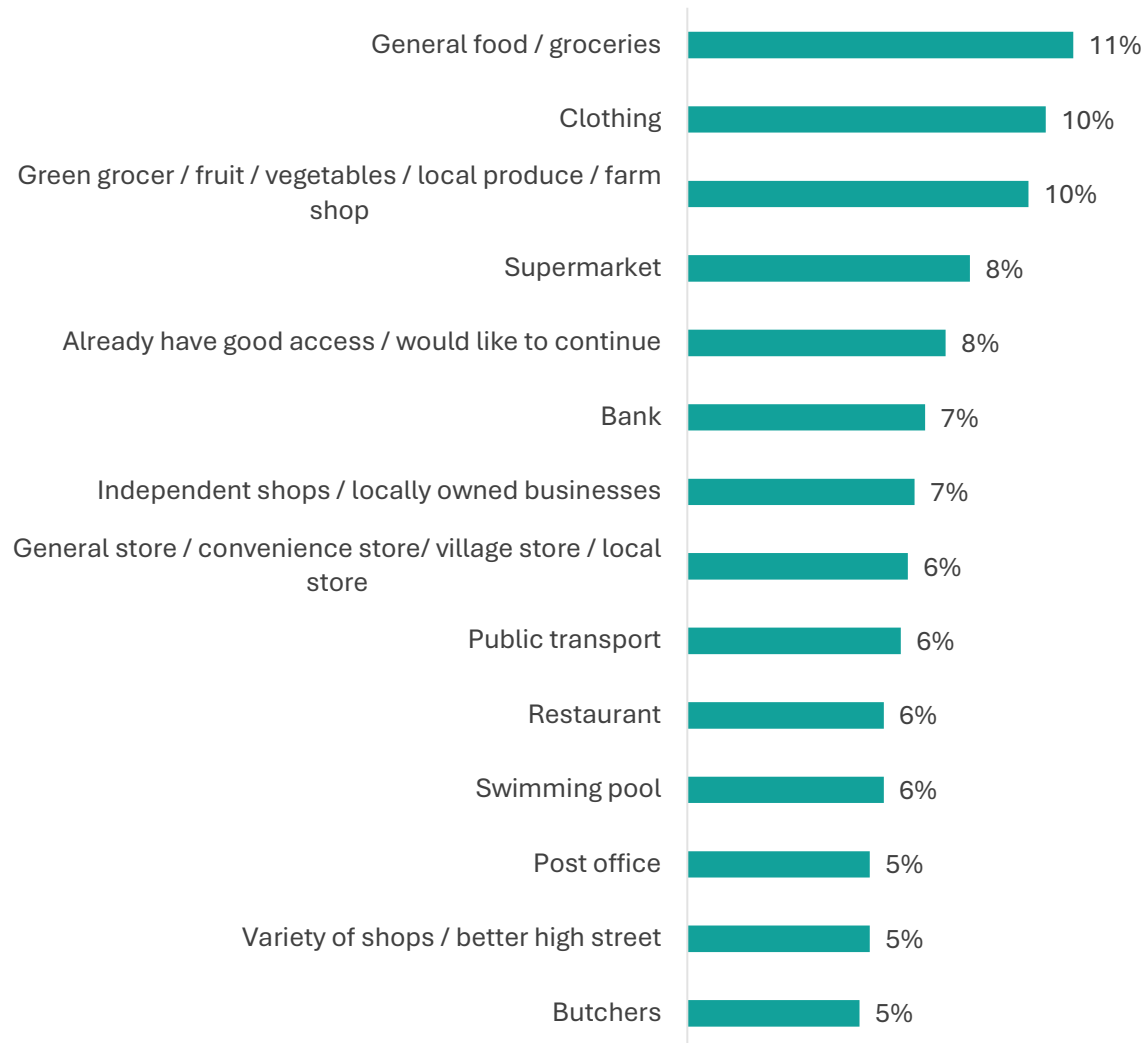
Barriers to residents using public transport



Residents would like better access to a range of food and grocery providers

This includes those who would like access to more food or groceries generally (11%), those who would like more fresh produce from a green grocer, farm shop or similar (10%), and those who would like better access to a supermarket (8%)

Amenities residents would like better access to



The majority of residents have participated in some form of outdoor activity, including walking, in the last 12 months

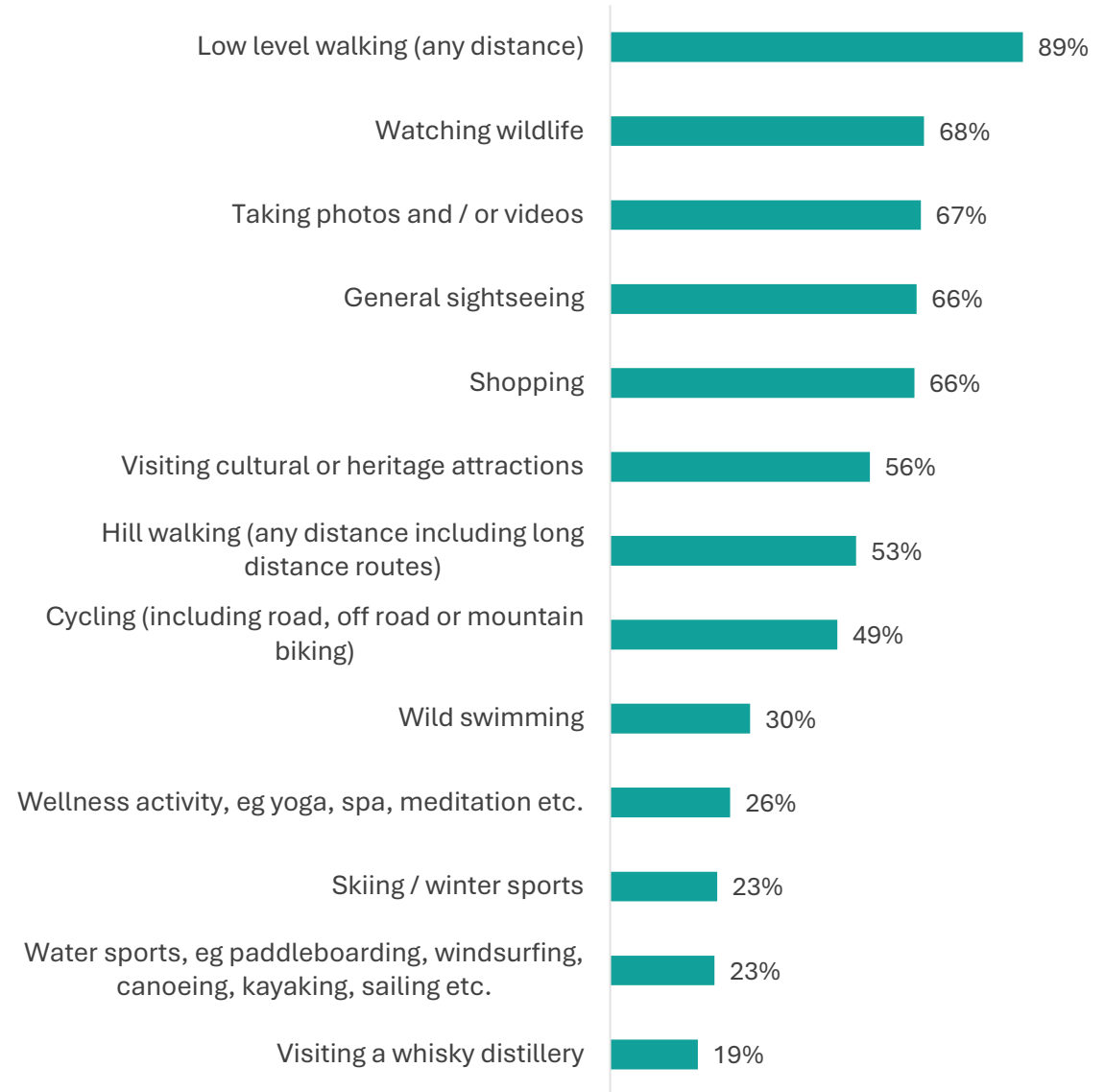
Almost nine in ten (89%) residents have done a low-level walk of some length, and 53% have done a hill walk of any length. 92% have done either a hill or low-level walk.

Seven in ten (68%) have participated in wildlife watching, highlighting again the importance of the natural environment to residents. 56% have visited a cultural or heritage attraction, demonstrating that these are of benefit to local residents as well as tourists.

The most common activities among respondents living outside of the National Park are general sightseeing (78%) and taking photos or videos (73%). 84% have done a low-level walk and 56% a hill walk.

Residents who have lived in the National Park for less than five years are more likely to have done most activities except golf, skiing, fishing and field sports than those who have lived in the National Park for longer.

Those who work from home in the National Park are more likely to have done most activities, which could be because they have more time than other residents but may also be due to these residents being more likely to have moved to the National Park in the last five years.

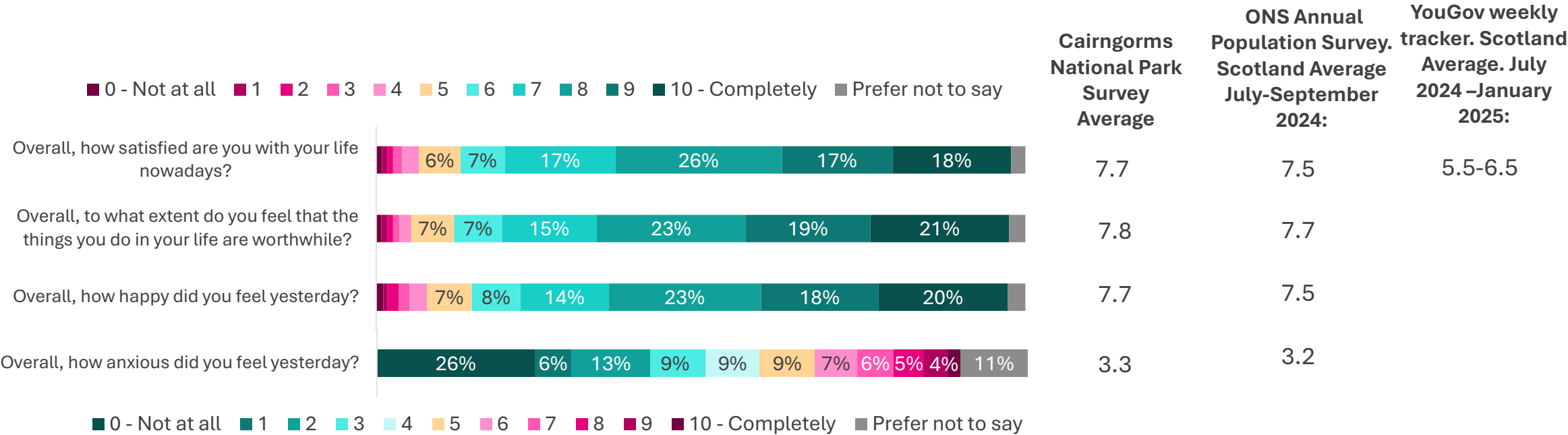


Wellbeing and social isolation

Personal wellbeing among residents in the National Park is at the same level with the latest data released for Scotland from the ONS' Annual Population Survey, and above the scores in YouGov's weekly tracker

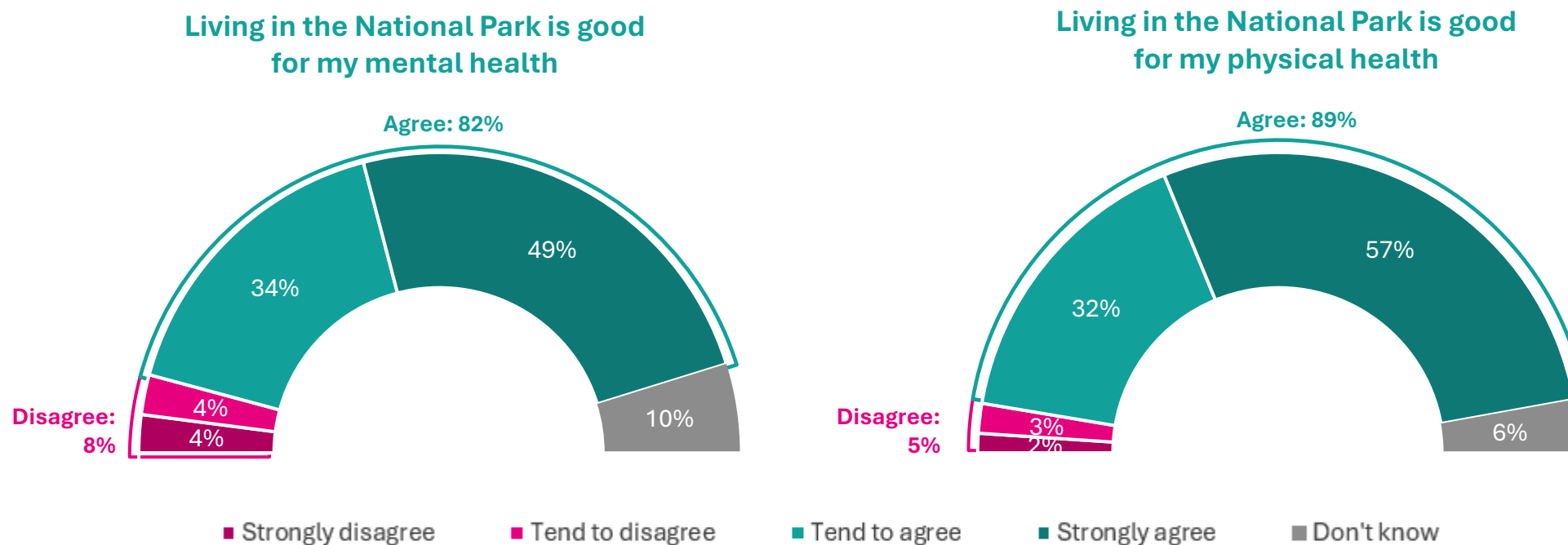
When comparing to benchmarking data, it should be noted that the ONS' data is achieved via telephone interview, which could be open to social desirability bias, as this is an interviewer-led data collection technology, while YouGov's tracker, like this survey, was conducted online. The YouGov figure shown below displays the highest and lowest average satisfaction score achieved across the fieldwork period.

While the results are generally positive, it is important to note that 13% rated their life satisfaction as between 0-5, with 12% rating that between 0-5 in terms of their life being worthwhile, and 15% rating their happiness yesterday as between 0-5. Meanwhile, 17% rate their anxiety level as between 7 and 10.



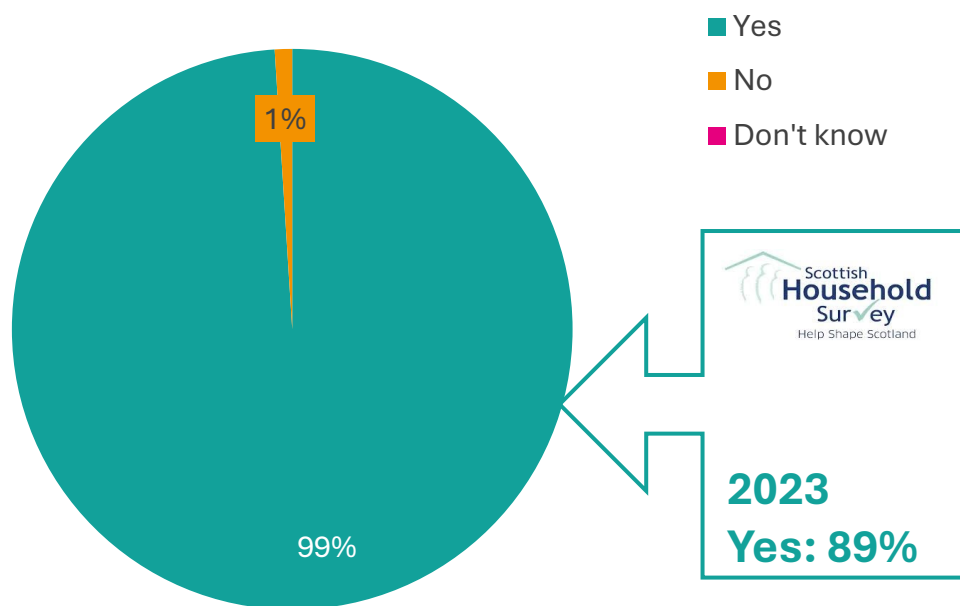
Most residents agree that living in the National Park positively contributes to their mental and physical health

This is particularly the case for those who have moved to the National Park in the last five years, of whom 92% state that living in the National Park is good for their physical health, and 97% that it is good for their mental health. It is, however, notable that those working in the land management and farming sector are less likely to agree that living in the National Park is good for their mental (80%) and physical (71%) health, albeit these figures are still high. This suggests that the benefits for wellbeing of living in the National Park are not shared equally among all residents.



Almost all National Park residents can access greenspace within a ten-minute walk of their home, compared to 89% of Scottish residents as a whole

Can easily access green space within
a ten-minute walk of home



This compares to the 2023 Scottish Household Survey results, in which 89% of Scottish residents stated that they could access greenspace within a 10-minute walk of their home.

Of those who could access greenspace, 90% state that the availability of local greenspace positively impacts their mental and physical health.

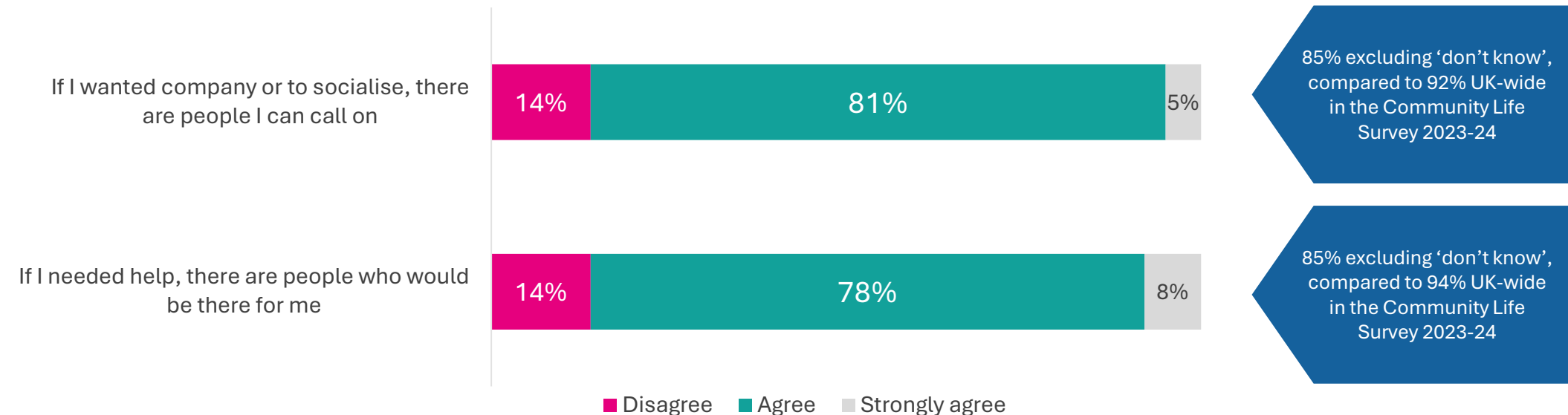
However, these benefits are felt to a lesser extent by residents who:

- Have lived in the National Park for more than 30 years (86%) or since birth (82%).
- Who are work in person at a location outside of the National Park (82%).
- Work in land management and farming (82%).
- Work in Tomintoul and Glenlivet (79%).

While the vast majority believe there are people they can call on to socialise – or who would be there for them if they needed help – this lags behind the proportion who stated this UK-wide in the Community Life Survey 2023-24

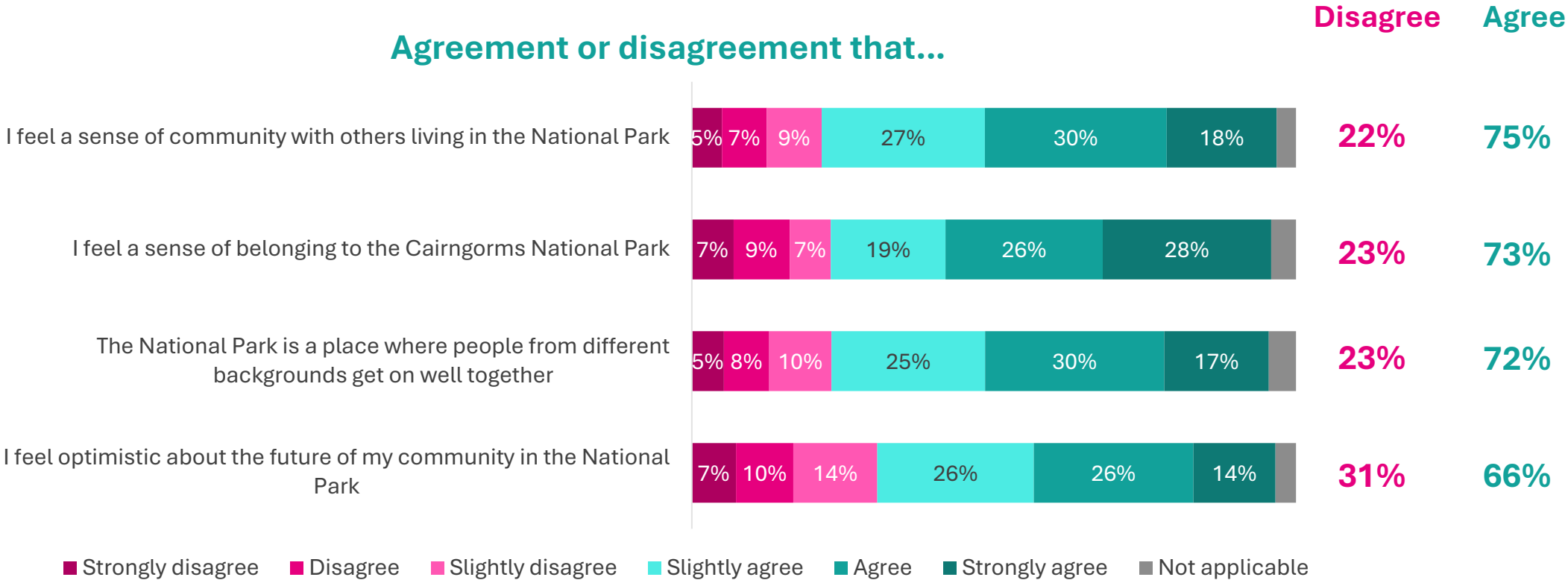
This highlights that some parts of the community in the Cairngorms National Park are isolated and could benefit from initiatives which help them to build links with their local communities.

% of residents who agree or disagree that...



There is a sense of community and belonging to the National Park among the majority of residents

However, it is worth noting that 31% disagree that they feel optimistic about the future of their community (66% agreed).



Involvement in local community

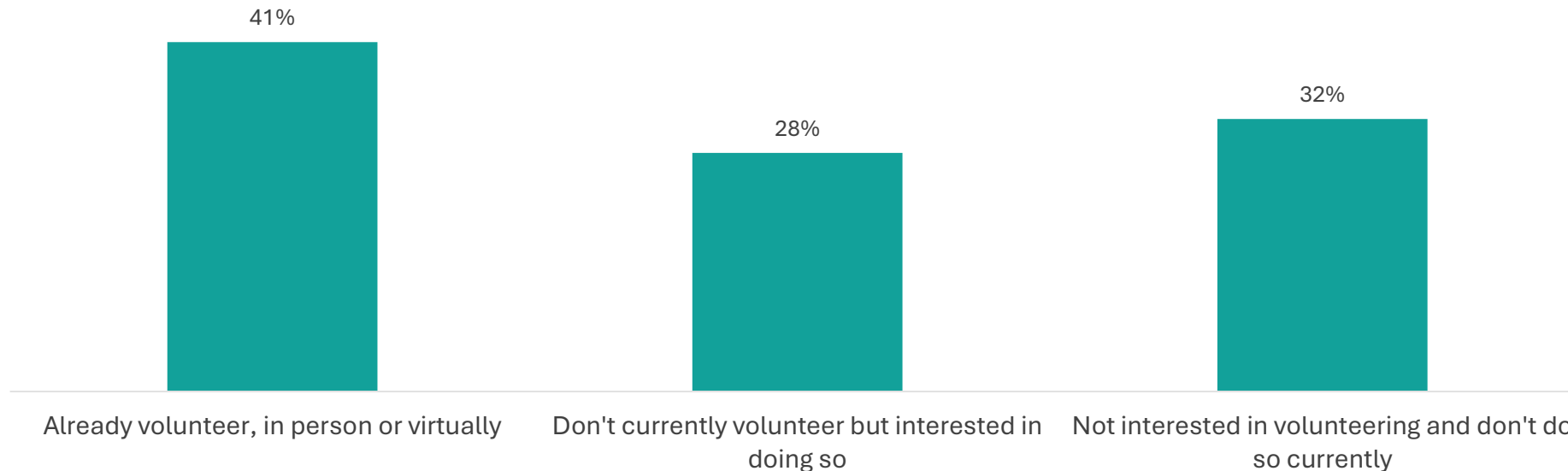


There is a strong appetite for volunteering in the National Park

Four in ten (41%) volunteer either virtually or in person, with a further 28% interested in doing so. This compares to results from the Scottish Household Survey, in which 18% of Scottish residents stated that they have participated in formal volunteering in the last 12 months. However, it should be noted that these questions were asked in different ways and that residents of the National Park were not asked if they participated in 'formal' volunteering.

Volunteering opportunities could help to reduce isolation of residents of the National Park as, of those who currently volunteer in person, 84% agree that they if they needed help, there are people who would be there for them, compared to 74% of those who don't.

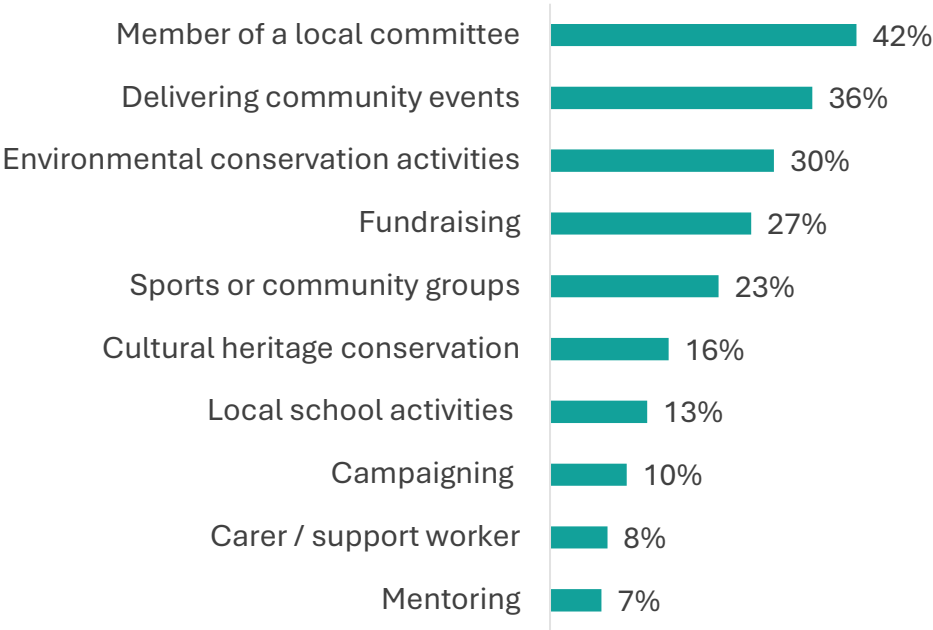
% of residents who volunteer



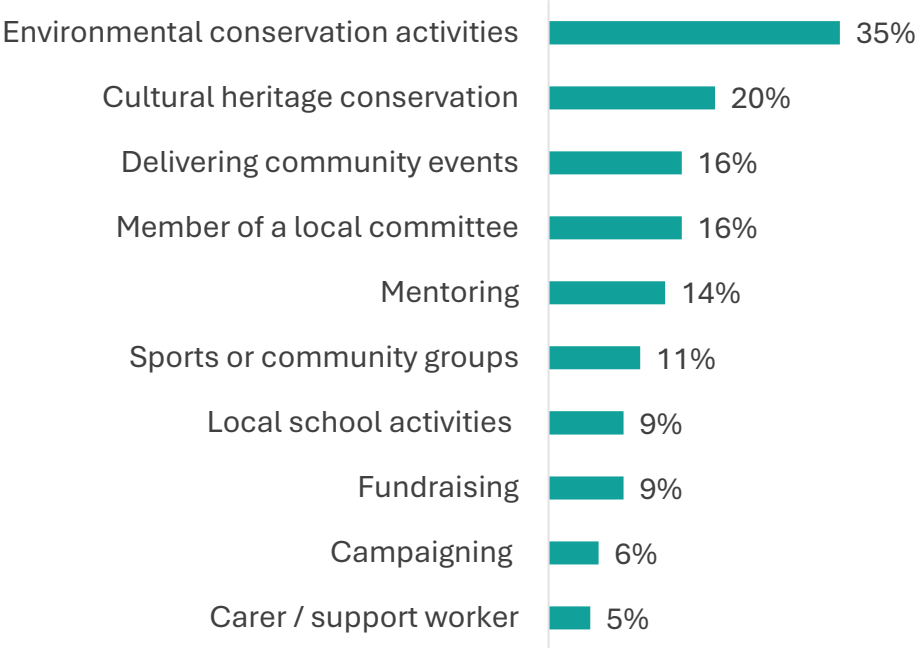
Volunteers are most commonly members of a local committee or deliver community events

Meanwhile, residents were most interested in taking part in environmental conservation activities.

Volunteering activity taken part in, shown as % of residents who volunteer currently



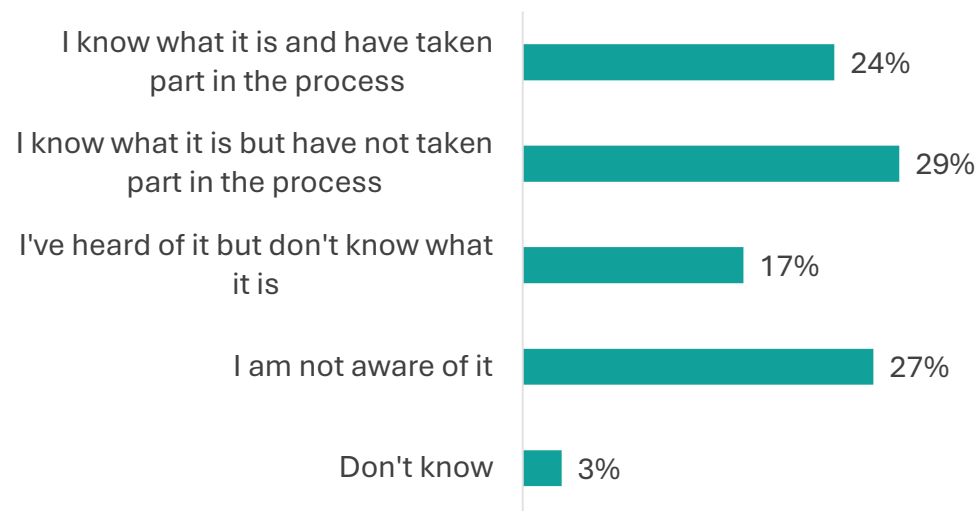
Volunteering activity interested in, shown as % of residents who either volunteer currently or are interested in doing so



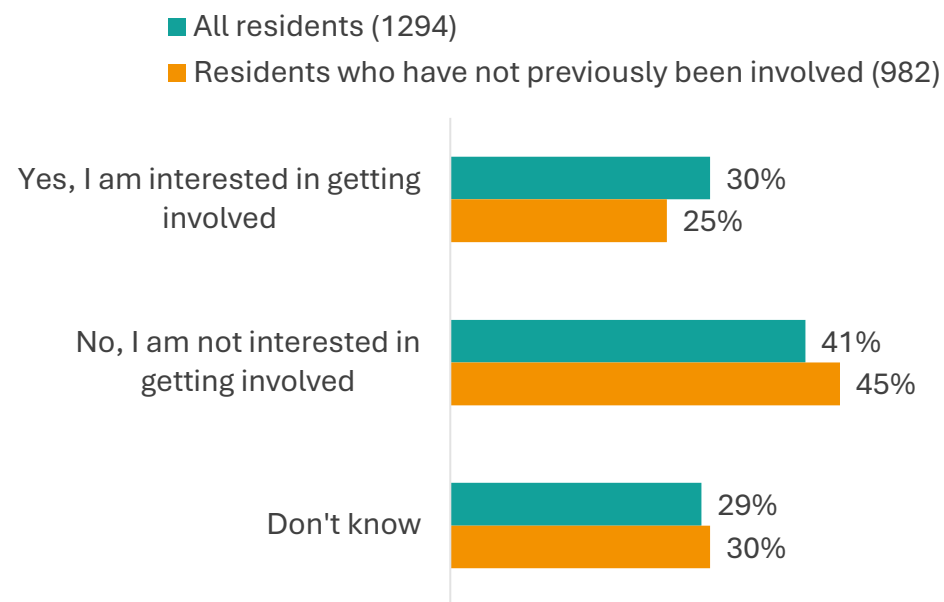
There is mixed awareness of Community Action Plans and, while only 24% have taken part so far, a further 25% are interested in doing so

The appetite to get involved suggests more information about how to do this should be shared with residents, to publicise the Community Action Plans and encourage future participation.

Awareness of Community Action Plan among residents



Interest in getting involved in local Community Action Plan



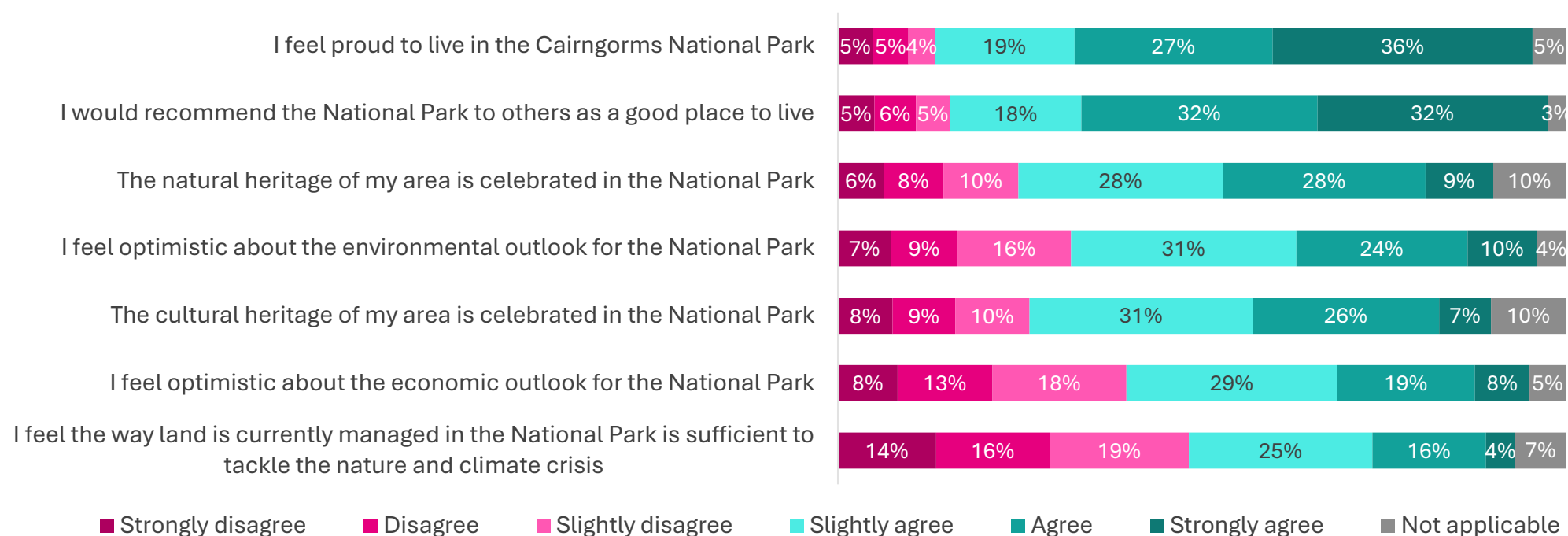
Attitudes and perceptions of residents and employees in the National Park



The majority of residents feel proud to live in the Cairngorms National Park and there is positive sentiment around the natural heritage of the National Park

However, there are greater concerns around the economic outlook of the National Park and the way land is managed to tackle the nature and climate crisis. Most groups of residents are similarly likely to agree with these statements; however agreement tends to be lower among those who have lived in the National Park for more than 30 years or since birth, those who work in land management and farming, are self employed, and those who don't receive the Real Living Wage.

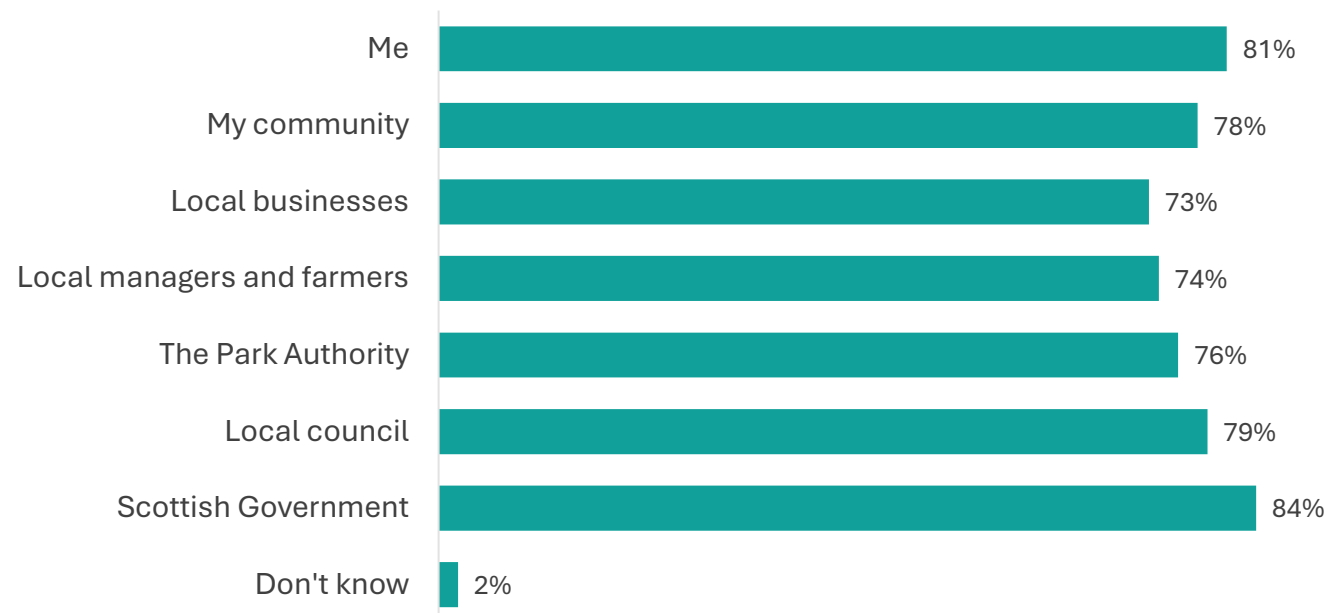
Agreement or disagreement that...



Responsibility for reducing and adapting to the impacts of climate change is believed to be shared across a range of groups, with residents themselves (81%) and the Scottish Government (84%) most commonly believed to hold responsibility

A small number also wrote in additional bodies they held to be responsible, including the UK Government (3%), tourists and visitors (1%), that it is a global concern (1%), or that it is not an issue they see anyone holding responsibility for (2%).

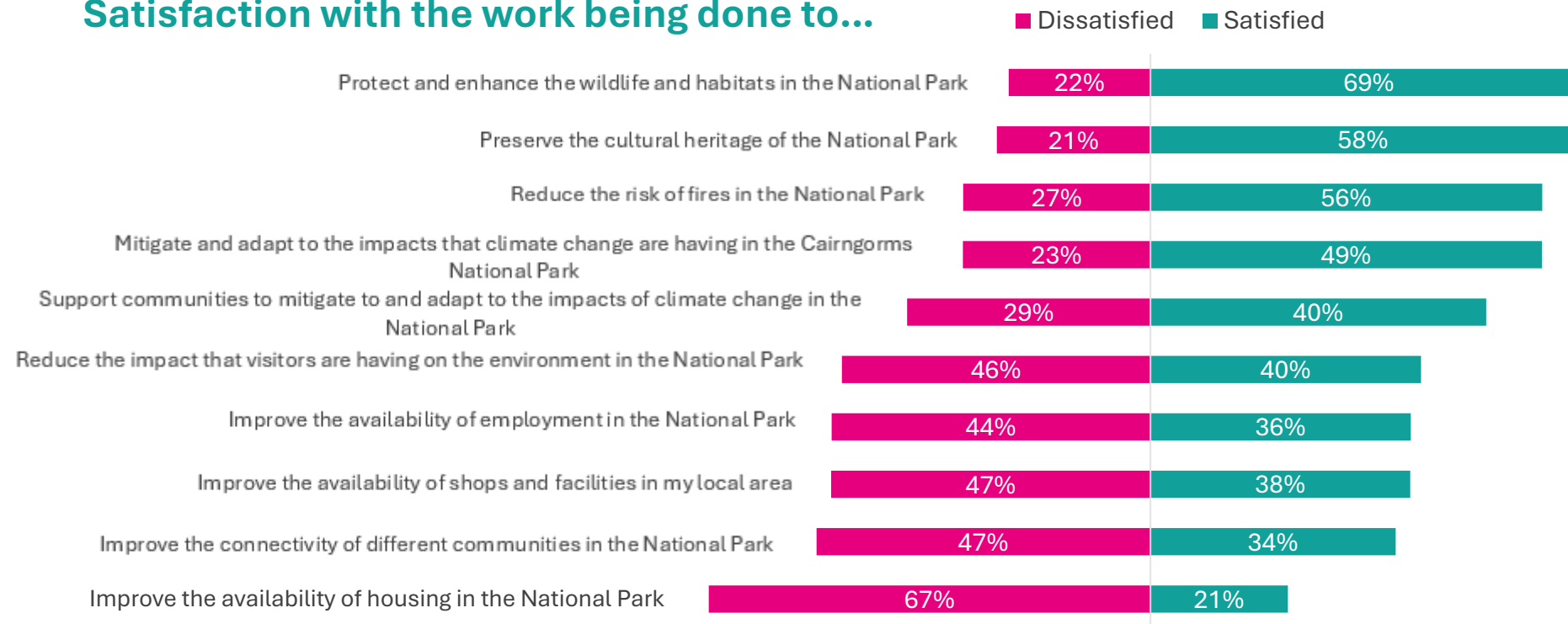
Residents who have lived in the National Park for less than five years, those who work remotely in the National Park, or are female are more likely to state that they, their community, local businesses, land managers and farmers, the Park Authority, local council and the Scottish Government are responsible for reducing and adapting to the impacts of climate change. This indicates that these are groups who most feel that responsibility should be shared evenly across society.



In terms of work being done by a range of organisations in the National Park, residents were least satisfied with efforts to improve the availability of housing; this was also the area which was most important to them

Satisfaction was highest with the work being done to protect and enhance the wildlife and habitats in the National Park. Residents who have lived in the National Park since birth are more likely than others to be dissatisfied with the work being done to protect and enhance the wildlife and habitats in the National Park (32%) and with the work being done to mitigate and adapt to the impacts of climate change (30%). Those who have lived in the National Park for 30 or more years, or since birth, are also more likely to be dissatisfied with the work being done to improve the availability of employment (55% and 59%) and housing (77% and 77%) in the National Park.

Satisfaction with the work being done to...



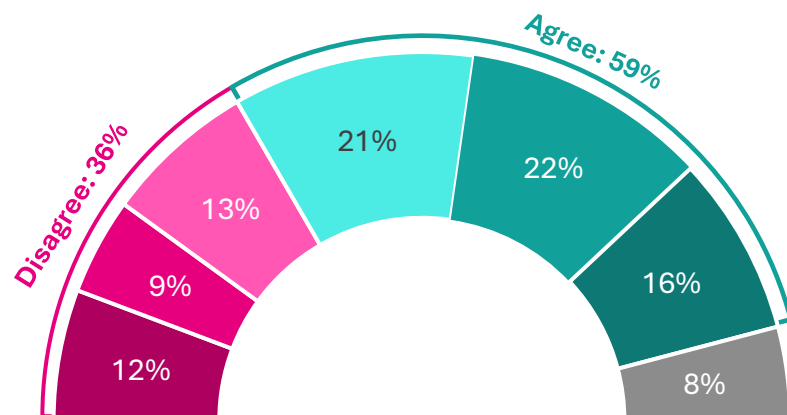
Reflections on the Cairngorms National Park Authority



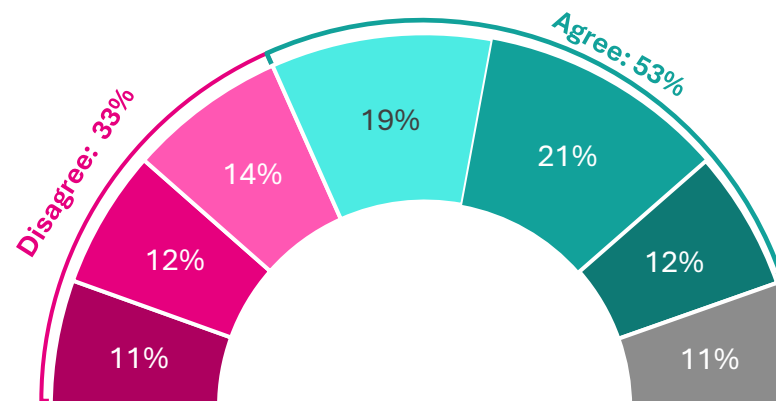
A majority of residents feel the designation of the Cairngorms as a national park has had a positive impact on the area (59%) and on them individually (53%)

Residents who have lived in the Park for 20+ years, or since birth, those who are self-employed, those working in retail, those who live in Badenoch, residents aged 65+, and those who don't earn the Real Living Wage are more likely than other residents to disagree with these statements.

The designation of the Cairngorms as a national park has had a positive impact on the area



The designation of the Cairngorms as a national park has had a positive impact on me

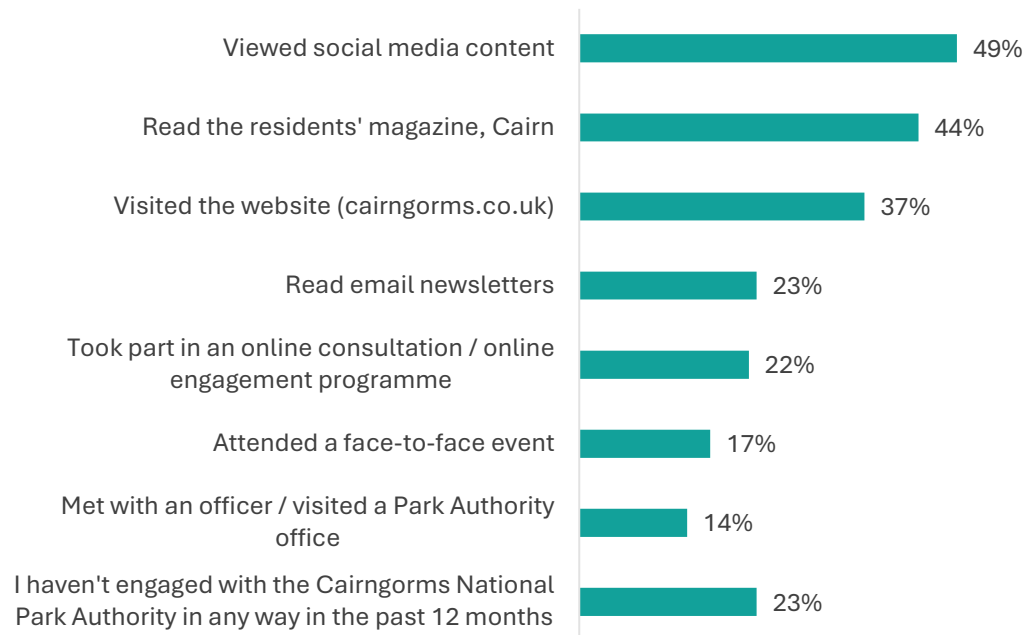


■ Strongly disagree ■ Disagree ■ Tend to disagree ■ Tend to agree ■ Agree ■ Strongly agree ■ Don't know

Three quarters (73%) of residents have engaged with the Park Authority in some way in the last 12 months, with more finding it easy (53%) than difficulty (23%) to find information on their work

Among those who have engaged with the Park Authority, this was most commonly through viewing social media content (49%) or reading *Cairn* magazine. Meanwhile, nearly a third of residents have engaged face-to-face either through an event or office visit.

Methods by which residents have engaged with the Cairngorms National Park Authority



Ease or difficulty among residents of finding information on the work of the Cairngorms National Park Authority

