

# **The Economic, Social and Environmental Contribution of Landowners in the Cairngorms National Park – 2014 Report**

## **2 page Summary**

In 2013 CNPA commissioned SRUC, UHI Centre for Mountain Studies and Rural Solutions to carry out a survey of land owners in the Cairngorms National Park. The last time a survey of this kind was carried out was in 2002.

The overall aim of this work was to provide information available to all on the current economic, social and environmental role of landowners in the Park and their future aspirations, to inform future policy development and delivery of the National Park Partnership Plan.

The objectives were:

- i) To obtain detailed information on current land management practices, including income and expenditure, in order to:
  - provide comparisons with previous surveys undertaken in the National Park area;
  - demonstrate the role of land owners and managers in delivering the National Park Plan and providing economic, social and environmental benefits;
  - highlight the benefits to the economy, environment and people of Scotland;
  - identify opportunities to progress specific actions in the National Park Plan;
- ii) To gain an insight into future aspirations for land-use in the National Park in order to:
  - guide future land management support;
  - assist in preparing land managers to make the most of future opportunities;
- iii) To provide CNPA with an up-to-date contact database for communicating more efficiently with land owners and managers in the National Park

The survey included detailed questions on landholding characteristics, management objectives, income and expenditure across a range of sectors and landowner confidence, key challenges and future opportunities.

The direct and indirect economic impacts of landowners in the sample were calculated using Scottish Government multipliers with economic impacts aggregated using information on total landholdings in the park to assess total economic impacts for the respondent sample and the whole of the National Park.

Survey responses were supported by 19 semi-structured interviews with a diverse subset of landowners from the survey response group.

The full (88 page) report is publicly available on the CNPA website.

## **Overview of findings**

The survey, received 52 useable responses, accounting for 56 landholdings totalling 407,341 ha, 301,188ha of which lay within the Park boundary, equating to 66% of the area of the National Park.

The sample included responses defining themselves as 32 traditional mixed estates, 7 sporting estates, 5 farms, 6 conservation landholdings and 2 classified as other.

Private landownership was dominant, accounting for 43 responses and 82% of the represented land area.

On average landholdings had been in the same ownership for 92 years, with 32 in the same ownership for under 100 years and 7 for over 300 years.

The dominant form of land use was managed moorland (189,552ha), followed by rough grazing (66,678ha), conservation (35,165ha) commercial forestry (28,390ha) and native woodlands (19,384ha).

The most prevalent objectives of 'high importance' were sporting land uses (27), agriculture (23), conservation (20) and forestry (19), followed by residential property (17), tourism and leisure (16) access and interpretation (10) and renewables (8).

The most common area where respondents wanted to increase activity in the future was renewable energy (30), followed by tourism and leisure (18), forestry (17), conservation (16) and agriculture (12).

Direct income from activities on respondent landholdings (n=44) totalled £28.1M. Additional indirect income outputs (supply chain impacts) derived based on Scottish Government multipliers totalled £14.2M, with a further £6.6M of induced outputs (proportion of increased household income spent on goods and services) giving a total direct, indirect and induced economic impact for survey respondent's landholdings of £49M with a total GVA effect of £20.2M.

Using per hectare figures for economic impacts calculated across the different land size categories estimates were made for the total income derived economic impacts resulting from all landowners (including non-respondents) in the Cairngorms National Park. It was estimated that these landholdings generate £31.9 million income, which contributed £55.5 million to Scotland's output after indirect and induced impacts were included.

After accounting for direct, indirect and induced effects the income generated by the CNP landowning group was also estimated to have contributed £12.5 million to Scottish household incomes, maintained 778 FTE jobs and contributed £22.9 million to Scotland's GVA.

Direct expenditure (excluding staff) across all sectors was estimated as £13.2M, with total direct, indirect and induced expenditure impacts of £25.8M. Additional direct expenditure on staffing totalled £12.1M, with total direct, indirect and induced impacts of staffing expenditure estimated as £29M. The total GVA effect of non-staff expenditure was estimated to be £11.2M.

Sixteen respondents owned or managed community facilities and 37 regularly communicated with the local community, although much of this was informal. Eight did not regularly communicate with the local community. Examples of strong community-landowner interactions and partnerships were evident, although limited in number.

Respondents were generally confident that income levels were likely to be maintained, particularly in relation to residential property and tourism with reasonable but lower confidence in relation to traditional land uses. Respondents expected investment levels over the next 3-5 years to be maintained and/or increased.

Key challenges outlined by respondents included potential impacts of land reform; declining availability of support payments and grants; planning authority requirements; changes to wildlife management legislation and conflicts relating to visitor pressures.

Key future opportunities identified by respondents included renewable energy schemes; tourism development; partnerships and collaborations between landholdings and other businesses and wider organisations; joint working between landowners and communities; and greater support and advice for agricultural and sporting land uses and housing developments.