Cairngorms National Park

Tourism Marketing Strategy

June 2004

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Introduction

Introduction

The primary audience for the Tourism Marketing Strategy are the National Park Board & Authority staff, elected representatives and decision makers throughout the Park, and all stakeholders who may be directly affected and have a role to play in its implementation. This is a dynamic document which will be reviewed and updated taking into account changes in the national tourism structure, developments on sustainable tourism, and as a result of increased knowledge from market research.

Area Context

The Cairngorms National Park was established in March 2003 by the Scottish Parliament, and assumed its operational powers on September 1. It encompasses 1,467 sq miles, and is the UK's largest National Park. Geographically its stretches from Grantown on Spey in the west to the Angus Glens in the east, from Ballater in the north to Dalwhinnie in the south.

Stakeholders

The stakeholders within the Cairngorms National Park both epitomize its diversity, and the opportunities offered by collaboration throughout the Park. In order to assist the National Park Authority in effectively developing, promoting and marketing the area, the Tourism Development Working Group was established, by the Park Authority, to bring together various interests and drive forward positive developments and improvements in tourism in the area. The Group comprises representatives from a wide range of key organisations, including the current three area tourist boards, VisitScotland, representatives from local tourism businesses and commercial concerns, environmental organisations, government agencies, local authorities and community groups, each with an interest in tourism and an influence in the future of the Park. A full list of stakeholders and their respective roles in tourism is at Appendix 1.

The Tourism Vision for the Future

The vision for the future of tourism in the area is to:-

Establish the Cairngorms as one of the most spectacular National Parks in the world with a reputation for superb visitor facilities and services, and access to a landscape of unrivalled natural beauty in which businesses can flourish in harmony with the natural environment.

Overall Objective of the Tourism Marketing Strategy

"To develop a world class brand and marketing strategy which contributes to the sustainable year round economic prosperity of the area, for the benefit of all those who live, work and enjoy the area, primarily through the attraction of visitors who recognise the quality of the natural environment and the incredible diversity of the product – the Cairngorms National Park."

Key Aims of the Strategy

Sustainable tourism is the overarching framework for tourism in the Cairngorms, which the Park Authority is striving to develop and improve further. The Tourism Marketing Strategy is set within this context, with the key aims of the Strategy being to:-

- **Utilise the opportunities created by the designation of the Cairngorms as a National Park to position the area as a quality destination for all to enjoy.**
- **Encourage both new and returning visitors to continue returning to the area, throughout the year either on a more frequent or longer stay basis.**
- **Ensure that all marketing activity is delivered in an integrated and co-ordinated way, thereby maximising the area's potential.**

All of which will take due regard of the four main aims of the Cairngorms National Park, namely:-

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

National Parks (Scotland Act) 2000

Strategic & Policy Context

The Tourism Marketing Strategy has been prepared taking cognisance of the fact that there are other marketing and development agendas to be taken into consideration, not least Visitscotland and the three Area Tourist Boards, and they have a direct or indirect influence on the viability and success of initiatives proposed.

Sustainable Tourism

The European Charter for Sustainable Tourism seeks to balance a market led approach to development and marketing activity, within designated protected regions across Europe, such as the Cairngorms, with the need to enhance the quality of life of those who live, work and spend their leisure time there, and the conservation and enhancement of the natural and cultural heritage of the region. The sustainable tourism approach means seeking harmony between economic, environmental and social aims. In National Parks and other protected areas, sustainable development programmes demonstrate the desire to promote economic development[1].

The Cairngorms National Park is currently pursuing the adoption of the Charter, which will require stakeholders to develop a greater understanding of sustainable development as a tool for economic growth. The process of developing and implementing the Charter will provide stakeholders in the Park with this understanding.

The UK Tourism Structure

VisitBritain
As the UK appointed former British Tourist Authority, VisitBritain has a remit to promote Britain to an international audience. The Cairngorms National Park is included within the product portfolio of Britain's National Park's. VisitBritain are currently considering, in conjunction with the Association of National Park Authorities (ANPA) how best to effectively market all of the UK's National Parks and the Cairngorms will be kept up to date on developments.

VisitScotland
VisitScotland exists to support the development of the tourism industry in Scotland and to market the country as a quality destination. As one of two National Parks in Scotland, the Cairngorms National Park is part of the VisitScotland portfolio both as an destination in its own right and through the promotion of tourism businesses within the Park. The organisation has a direct involvement in marketing the Park.

Local Area Structure
Currently there are three area tourist boards directly involved in the promotion of tourism within the Park. These are Aberdeen and Grampian Tourist Board (AGTB), Angus & Dundee Tourist Board (ADTB),Highlands of Scotland Tourist Board (HOST). This will change in April 2005, with the ATB structure replaced in the Cairngorms area by three hubs of VisitScotland.

Stakeholders
In establishing the Tourism Development Working Group, the National Park Authority has drawn together representatives from all aspects of the tourism industry to work together for the collective benefit of the area as a whole.

The Tourism Market – Key Issues

Scottish Tourism Market
Market research (available on www.scotexchange.net) has highlighted potential opportunities for the Cairngorms in attracting identified national niche markets to the area. These include recreational niche markets such as walking, cycling, skiing & fieldsports, other activity based holiday markets, and the short breaks market.

Prediction of future trends suggests that Scotland's visitor profile will continue to mature, but will become more educated and affluent. They are increasingly active, well travelled and have high expectations of customer service and value for money. In depth analysis of future trends is at Appendix 10.

The Cairngorms Tourism Market
The interim results of the Cairngorms Visitor Survey (2003-2004) provides the most up to date information on visitors to the Park as a whole, where they come from and why they come to the area.

There are a high number of visitors who return to the Cairngorms on a regular basis. 80% of visitors are from the UK, 48% of whom are from Scotland, with the main visitor group being two adults on holiday. Overseas visitors account for the remaining 20%. The percentages and origins of these visitors varies throughout the Park area. A full breakdown of the tourism market in the Cairngorms is at Appendix 11.

Existing Cairngorms Marketing Activity
Currently three Area Tourist Boards seek to attract visitors to their respective areas within the Cairngorms National Park as part of marketing efforts. Information on the number of visitors, the number of bed nights and the visitor spend for each area as a whole shows that tourism in each area is of significant economic value to the area. These three areas receive 5.3 million tourist trips, 20.3 million bednights and a visitor spend of £1,054 million. There is a need for this information to be available specifically for the National Park area, and work is required to deliver this information. More information per ATB area is at Appendix 12.

Quality Service
Dramatic mountain scenery, diverse wildlife, engaging heritage and culture, and an array of excellent amenities set a standard, but they do not set apart a destination in the modern market place. For the visitor to choose, there is a need to offer a unique overall experience. This sits well with the sophisticated modern visitor, seeking to enjoy maximum benefit from minimum preparation. It is providing this level of world-class service that will set the Park apart within the global market place. There is a need to ensure that the quality of service throughout the Park in all aspects of tourism matches the quality of the environment.

The Competing Market Place
There are significant changes in the market:-

- Competition is in a global market place and as such there is a need to provide differentiated information, to make it easy for the customer to book and to provide world-class service at the destination.
- The increasing competition in the marketplace together with the increasing sophistication of consumers is resulting in complex tourism products.

Collaboration between private firms and private and public organisations enhance the ability to develop and promote such products.
- The demand for visitors looking for 'new experiences' is growing.
- Repeat customers and friends and relatives being advised to come provide the largest source of visitors.

Competitors
With ever-greater ease of travel, visitors continue to broaden their horizons. The tourism market is no longer confined to national boundaries. The Cairngorms National Park is competing in a global market place, where attraction is judged against the rest of the world. Though the Park has many exemplary qualities, its attributes are matched or exceeded, in some other accessible part of the world. Amenity therefore will no longer be enough to guarantee visitors.

Research shows that the competitive edge is maintained by placing significant emphasis on enhancing the overall experience of the tourist. The Cairngorms main competitors are potentially identified as other scenic, iconic parts of Scotland such as Loch Ness & Skye, other UK National Parks in particular Loch Lomond & the Trossachs; activity based holidays throughout the UK (with particular attention to marketing activity in the Fort William area), and in an international context, Ireland and Wales as tourism destinations. A breakdown of competitor analysis is at appendix 9.

Year Round Destination
Geographically, the attraction of the Cairngorms National Park is diverse. The mountainous west gives way to the valley glens of the south, and the flatter, rural landscapes of the east and north. The resulting visitor profile is greatly influenced by this diversity, but is also significantly shaped by the seasonal profile.

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

The Cairngorms has the ability to be a year round location and the lengthening of the season to encourage visitors in the shoulder months is a key issue for the Tourism Marketing Strategy to address.

Products of the Park
The Tourism Marketing Strategy seeks to add value to products and services that are special to the Park, by establishing and promoting the image of the Park and encouraging partnerships within the Park. By working together, producers, distributors and retailers can add value by guaranteeing a range of products and foodstuffs as originating from the Park, perhaps with breeding or harvesting in traditional ways to further differentiate and emphasise the quality. A selection of produce already exists which with support would be suitable candidates to brand as 'Produce of the Park'.

SWOT Analysis

The results of the SWOT analysis of the Park as a tourist destination provides key indicators for the delivery of the key aims of the Strategy.

Strengths

- An outstanding natural clean fresh environment, with natural beauty and open spaces
- National Park designation
- Diverse range of year round outdoor activities which can be easily accessed
- Wildlife in its natural environment
- Large cluster of varied visitor attractions
- Highland Games
- Royal Deeside

Weaknesses
- Lack of integrated visitor information that is available and the information that is needed.
- Variable standards of quality and service
- Lack of wet weather facilities
- Poor public transport infrastructure in and around, and to the Park
- Shortage of evening entertainment & early closing of catering outlets
- Lack of staff accommodation

Opportunities
- Redevelopment of Aviemore
- Develop & encourage quality standards for the Park to improve visitors experience
- Develop the Cairngorms National Park Brand as a strong brand
- Develop co-ordination and collaborative thinking to develop information on inclusive accommodation / activity packages and market them
- Develop the tourism potential of the area’s cultural heritage
- Improve integrated information & interpretation provision
- Capitalise on the growth in interest in the environment
- Develop tourism best practice, drawing on experiences elsewhere
- Improve the environmental performance of businesses and market this aspect

Threats
- No effective collaboration
- Potential environmental damage due to inadequate management
- Climate Change
- Erosion of political support for National Park principles
- Inadequate funding

Delivery of the Key Aims

The Tourism Development Working Group will lead the implementation of the Tourism Marketing Strategy, forming a variety of sub groups as necessary, with the National Park Authority acting as co-ordinator of all activity. All of these aims will only be effectively delivered through a collaborative approach, with all stakeholders working with the National Park Authority to ensure its successful implementation.

Branding

Develop a strong brand for the Cairngorms that presents a coherent image to visitors and contributes to the economic prosperity of the area.
A Brand identity must be agreed and developed, consistent with customer trends. The elements and temperament of the Brand building campaign must be defined and a launch programme for the Brand agreed. The Cairngorms Brand will seek to provide a cohesive image for the area as a whole within which existing and potentially new strong brands will continue to develop and evolve.

Communications: Consumer

Utilise the opportunities created by the designation of the Cairngorms National Park to position the area as an attractive destination to visit.
With ever increasingly expectations by the visiting public, the region must be seen to 'move with the times' and provide a modern and sophisticated experience.

Make all visitors aware that they are in a National Park and engage visitors in caring for the National Park through appreciation and understanding of the indigenous nature, heritage and culture.
Routes cross the National Park, so many people therefore will 'visit' the Park without necessarily realising so. The creation of a 'sense of arrival' at entry points, such as railway stations, roadside service stations and significant settlements in the Park, is important. The values of the Park must be communicated in clear, concise terms. The use of interpretation will seek to further strengthen the bond between the geography and the designation of the Park.

Communications: Stakeholders

Create a communications plan to engage with key personnel to inform and communicate information relating to the National Park and raise awareness of the Park's brand values the new brand image and opportunities to use it.
There is need for coherent advice and information for Park visitors. Communicating this information and encouraging pan park familiarisation is a key factor in strengthening relationships within the park area.
The resources devoted to developing both the brand and the marketing plan will be best utilised if they are introduced both to the business and wider community and the identified target markets. Communications will form a key part of the Action Plan.

Market Research *

Undertake comprehensive market research, to understand customer expectations and indicators for future development.
Customers of the Park are likely to have diverse wants and needs. In depth information therefore needs to be gathered to understand, meet, and hopefully exceed these expectations. Analysing customer feedback, balanced with information on future trends will ensure that the customer is better understood and future marketing initiatives can be tailored accordingly.

Product Development *

Encourage, develop and promote opportunities, new product development and services that meet customer needs and which are consistent with Park heritage and environmental values.
The sustainable development of market led product development should be encouraged and supported throughout the Park.

Quality Service Standards *

Provide visitors with a world class experience which competes within the worldwide market place and which encourages return visits and recommendations to friends and relatives.
Numerous surveys show that word of mouth recommendation carries the highest level of trust in potential visitors. The emerging culture needs to be one that values individual visitors as a potential lead to the next. Customer care is vital therefore in encouraging both repeat and new tourism activity in the area and initiatives aimed at developing and improving the quality of service throughout the Park should be supported.

Partnership Approach *

Collaboration throughout the Park, on marketing initiatives, information sharing and mutual resolutions to shared concerns.
Existing initiatives are developing which foster cooperation within the Park area. These should be enabled to continue to develop. The *Tourism Development Working Group* broadly represents all sectors of the industry, within the Park area, and provides a basis for discussion & development. The *Cairngorms Chamber of Commerce* offers a representative forum for any commercial concern located in the Park boundary. Outwith the Park boundary, there is a need to engage with national organisations and initiatives to ensure effective collaboration opportunities are maximised.

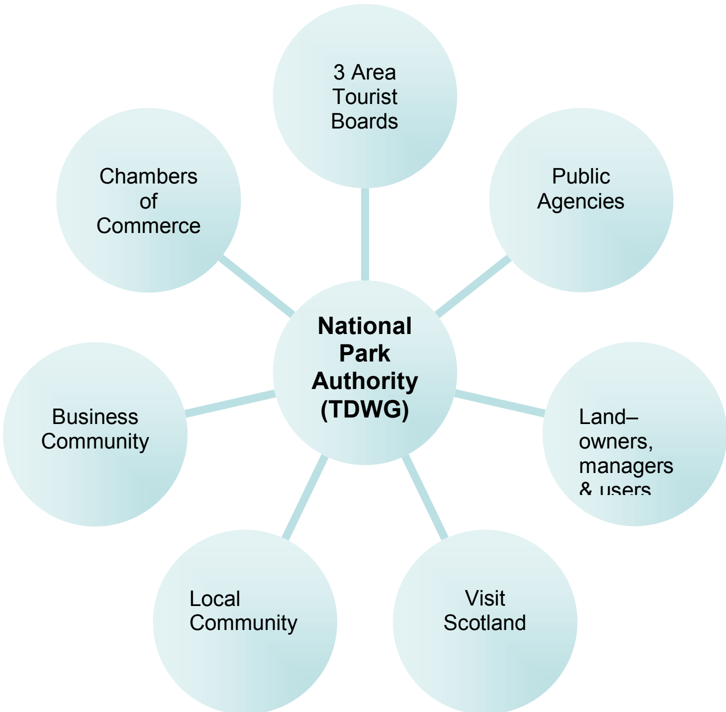
Monitoring Success

Appropriate indicators and targets will be developed against individual programmes and initiatives within the Tourism Marketing Strategy Action Plan. The overall performance of the Strategy will be monitored as part of the Sustainable Tourism Strategy and Action Plan.

It is important to note that these specific aims, whilst being integral to National Park's marketing effort, actually have broader tourism development implications. They will be central themes within the Park's Sustainable Tourism Strategy and Action Plan, being developed as part of the process of attaining the European Charter for Sustainable Tourism.

Appendix 1 – Stakeholders in the Cairngorms National Park

Stakeholders have a direct interest, financial or ideological, in the affairs of the constituent body. Similarly, they can be directly affected by the body's actions. To illustrate that, a graphic representation below, outlines stakeholders' in the Cairngorms National Park.



Stakeholders in the National Park represent the complete gathering of commercial concerns, public bodies and communities with interests within its boundaries, either benefiting from and/or contributing to the amenity of the Park. Its credibility as a product depends very much on adoption by this collective body. This adoption will greatly increase the visibility of the Park, and help achieve sustained and desired economic growth through all sectors of community commercial life.

Because of the economic profile of the region, many stakeholders fall within the tourism industry. It is through some part of this industry that visitors will, in the main, experience the amenity of the Park. Though already popular, the importance conferred by national park designation places Cairngorms higher on the tourism agenda. The Cairngorms National Park should play a greater future role in the industry's promotion at all levels through VisitBritain, VisitScotland and the three Area Tourist Boards.

However, many other aspects of commercial and community life have a positive impact on the amenity of the Park, and contribute to its unique essence. Similarly, the growing reputation of the National Park offers an opportunity to their own business promotion to share in the raised status that designation confers.

Businesses in all sectors of commerce stand to gain from economic growth brought about by successfully marketing the Park. Therefore their adoption and collaboration is also sought.

Estate management, agricultural concerns, environmental agencies and conservation bodies all play a part in shaping the land and flora that constitutes the Park, and all have an opportunity to express their involvement through their own marketing. Large estates, are active in land, wildlife and visitor management, and play an important role in employment and the greater Park economy. Much of the land enjoyed as a visitor amenity is also under agricultural use. While farm managers may deal directly with the National Park, or in many cases deal directly with visitors through their own businesses, the government agency for farming support, the Scottish Executive Environment and Rural Affairs Department, will also be involved in matters arising which may impact on the Park. Similarly, the polices of agencies such as Forest Enterprise, Scottish Natural Heritage and the Deer Commission for Scotland can make tangible changes to the Park amenity.

There are therefore obvious consumer marketing opportunities for the majority of stakeholders, each of whom should be encouraged to embrace the Park as an additional marketing tool, and they should be encouraged to participate in the collaborative marketing of the Park as a product.

Organisations that are stakeholders include:-

- The Cairngorms National Park Authority
- VisitScotland
- Highlands of Scotland Tourist Board
- Aviemore, Badenoch, Strathspey and Cairngorms (ABSC) Marketing Group
- Aberdeen and Grampian Tourist Board
- Angus and Dundee Tourist Board
- Highlands and Islands Enterprise
- Moray, Badenoch and Strathspey Enterprise
- Scottish Enterprise Grampian
- Scottish Natural Heritage
- Scottish Rural Property Business Association
- The Highland Council
- The Moray Council
- Aberdeenshire Council
- Angus Council
- Historic Scotland
- The Forestry Commission
- Royal Society for the Protection of Birds
- Crofters Commission
- The Deer Commission
- Committee of Deer Management Groups
- Scottish Water
- Scottish Environment Protection Agency (SEPA)
- Cairngorms Agricultural Forum
- National Farmers Union
- Highland Building Preservation Trust
- Braemar & Cairngorms Mountain Rescue Teams
- Speyside Way Management Committee
- Braemar Tourism Group
- Ballater Royal Deeside
- Ballater Business Association
- Cairngorms Chamber of Commerce
- Cairngorms Attractions Group

Appendix 2 – ATB Strategies

Aberdeen and Grampian Tourist Board is required *"to achieve sustainable growth, value and share of the tourism market, all year round. To build world class experiences and service levels for its target customers, and make a 'step change' in the region's performance as a local tourist economy."*

Angus & Dundee Tourist Board states that it will be "*a driving force for the development and promotion of tourism in Dundee and Angus. It will seek to increase visitor numbers and visitor expenditure, creating employment and improving the performance of the tourism industry throughout the area."*

Highlands of Scotland Tourist Board (HOST) is obliged to *"lead, enable and support the Highland tourist industry to expand its economic significance in a competitive world market*."

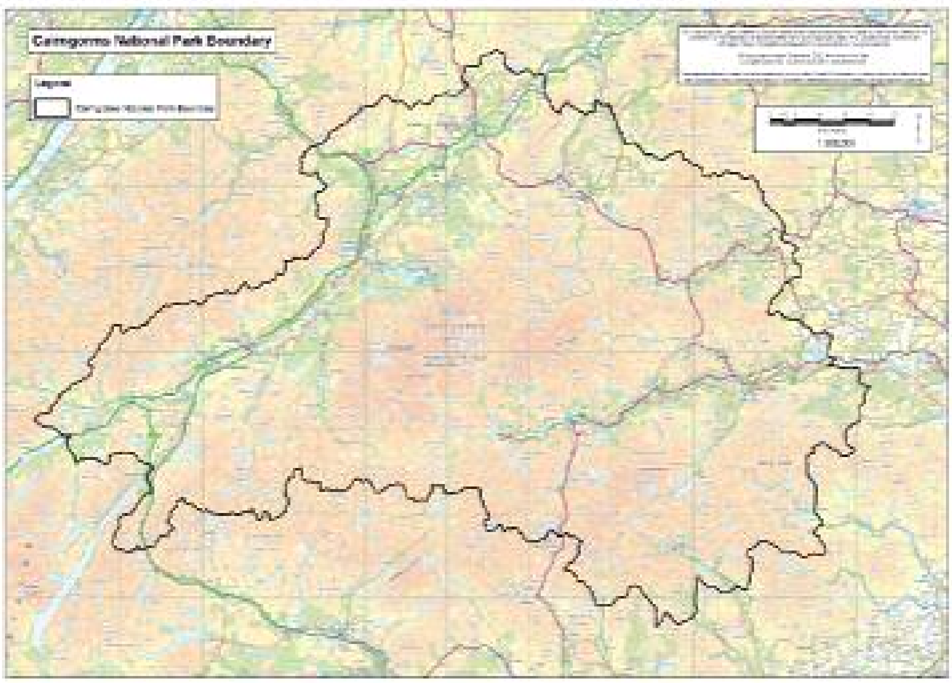
Appendix 3 – Cairngorms National Park Access to the Park & Boundary Map

Access to the Park
Access to the area is mainly by car with 86% of those who come to the area arriving in this way. Some entry points, notably from the head of the Angus Glens, are only accessible on foot.

National Access
Most of Scotland's population is within a three hour drive of the Park. The major population centres of Edinburgh and Glasgow, with their international airports have good road and rail links to the Park. A two hour drive puts Aberdeen, Angus and Dundee, Stirling, Fife and the Rosyth Superfast Ferry terminal all within reach.

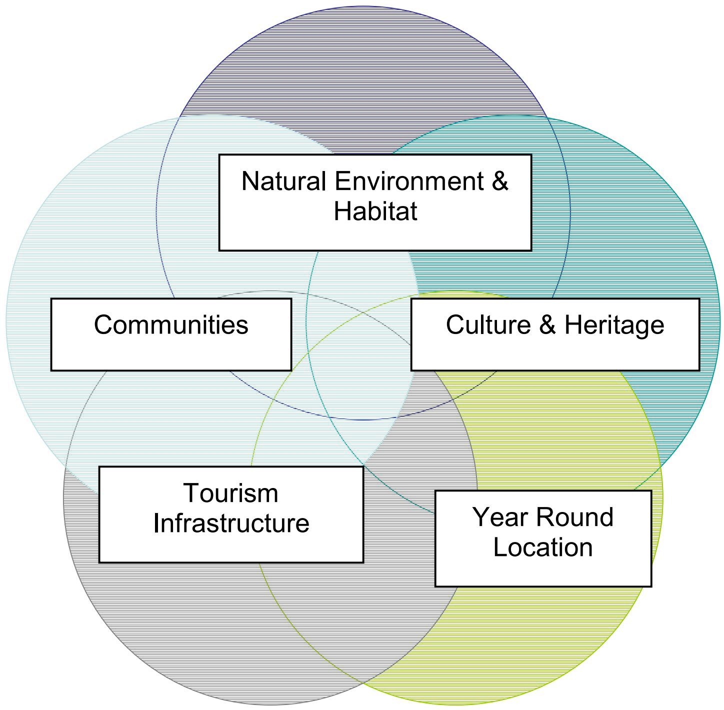
Visitors can access the Park through Scotrail and GNER train services from all principal stations in Scotland, although only around 1% of visitors currently use this option. Rail services pass through the western edge of the Park, including a direct day and an overnight rail service from London.

International Access
The main air gateways to the Park are through Inverness, Aberdeen, Edinburgh and Glasgow and are important access points for overseas visitors and those from the south of the UK. Prestwick airport, with transatlantic, charter and low-cost carriers, and the northern reaches of the M74 / M6 motorway network also lie within a four hour drive. The comfortable Superfast Ferry service, delivers several hundred passengers daily from Zeebrugge to Rosyth in Fife, which provides a further easy access starting point from which European visitors can to visit the Cairngorms.



Appendix 4 – The Market

Key factors such as the natural environment & habitat, the areas cultural & heritage, its communities, the tourism infrastructure and the ability of the area to be a year round destination are all linked and are interdependent on one another, as the diagram below highlights:



Potential Niche Markets for the Cairngorms National Park

Walking

- Walking is an extremely diverse market and covers low recreational walking, hill waking, distance walking, climbing and organised walking holidays, and the indications are that this market will remain strong in the coming years as visitors look for holidays that are an escape from day to day life.
- Demand comes from a broad section of the population; however, such holidays appeal most to people travelling without children. That is, either adults yet to start a family or those whose children have left home.
- Firmly established as the UK's number one pastime, walking accounts for almost a fifth of Scotland's tourist expenditure.
- Walking is shown to be a key influence for visitors choosing to visit the Cairngorms National Park, with 13% of visitors citing that the most important reason for visiting the Cairngorms was walking/hill walking. The importance of walking within the National Park is further highlighted by the fact that 33% of visitors to the Cairngorms area take part in hill walking, 30% in low level

waking (2 miles +) and 20% in low level walking (less than 2 miles) (Lowland Market Research, 2003).

- Across the UK, holidays where the main purpose of the trip was walking accounted for 300,000 trips, generating 2 million bednights and around 68 million of expenditure. Two thirds of visits came from England and around a third from Scottish residents.
- Although this was not their main reason for visiting Scotland, 39% of overseas visitors participated in some form of walking, hiking, rambling or orienteering. Assuming that the expenditure and trip patterns of the overseas walker are similar to the general overseas visitor, this would equate to 800,000 trips - generating 7.6m bednights and almost 370m.
- According to the 2002/2003 Highland Visitor Survey 45% of visitors to the MBSE area took part in low level walking of 2 to 8 miles, 19% in hill walking and 10% in low level walking of 8+ miles.
- When broken down further into the Badenoch and Strathspey region, the statistics show that 47% of respondents took part in low level walking of 2 to 8 miles, 9% in low level walking of 8+ miles and 23% in hill walking.
- Walking is the most popular pastime in Aberdeen and Grampian with 31% of visitors taking part in walks of more than 2 miles, 14% of visitors go walking or hiking whilst in the area.
- 16% of UK visitors to Perthshire took part in hiking/walking/rambling/other walking.
- In Angus and Dundee 5% of UK visitors took part in hiking/walking and 25% in long walks of more than two miles. (www.scotexchange.net)

Cycling

- Cycling is a popular pastime, with around 20 million bicycles in Britain. There are three main types of cycling tourism: cycle touring holidays, cycling on holiday, and mountain-biking.
- Cycling tourism in Scotland has grown by almost 50% since 1994. Generally, UK cycle tourists come between April and October, stay for around 7 nights and spend £38 million in Scotland each year.
- Cycling is an area that is growing in popularity due to a continuing interest in health and fitness and the need to curb private car use for environmental reasons. Facilities for cyclists are likely to improve.
- The vast majority of cycling visitors are from Scotland & England. The other main markets are France, Sweden & Holland (www.scotexchange.net).
- The Lowland Market research report shows that 7% of visitors to the National Park area take part in cycling (off road) and a further 4% take part in cycling (on road).
- It is likely that the demand for recreational cycling will increase in the next five years.
- According to the Highland Visitor survey the Moray, Badenoch and Strathspey area has higher than average participation levels in cycling, with 6% of visitors taking part in mountain biking (off road) and 5% in cycling (on road).
- When the area is broken down further to just Badenoch and Strathspey the figures are fairly similar with 4% of visitors to the area cycling on road and 6% cycling off-road/mountain biking.
- The figures relating to cycling were not available for Perthshire, Aberdeen and Grampian and Dundee and Angus.

Field Sports

- Field sports cover traditional hunting and shooting and, for the purposes of this profile, fishing.

- Approximately 110,000 visitors fish in Scotland every year, generating just under £30m worth of tourism spending in Scotland.
- Around 100,000 trips to Scotland are made to shoot and spending totals £23 million. This equates to a tourism spend in the Cairngorms in the region of £4.6m.UK and Ireland make up the majority of the market to Scotland although a number of European countries are also important. These include top earners from Belgium Germany, Nordic countries and Spain.
- Scotland's typical angling visitor is male, aged between 35 and 55 and from the ranks of the less well paid (www.scotexchange.net).
- Across the National Park 3% of visitors were found to take part in fishing (coarse), a further 1% take part in game fishing (Lowland Market Research, 2003).
- 1% of visitors take part in shooting/stalking/hunting.
- Continuing problems with disease and poor weather in Scotland could significantly affect the numbers of birds available and consequently the long-term viability of the industry. Similarly, falling numbers of fish in Scottish rivers is expected to have a significant impact upon the future of fishing in Scotland.
- There is increasing scope for hunting and shooting related incentive breaks in Scotland, however, there is also increasing competition, e.g. from Eastern Europe.
- UK and Ireland make up the majority of the market to Scotland although a number of European countries are also important. These include top earners from Germany, Nordic countries and Spain.
- Shooting appears to appeal to an older market with many country sports providers offering activities that are less taxing for older visitors. About twice as many men as women come to Scotland to shoot.
- In Badenoch and Strathspey 4% of respondents in the 2002/2003 Highland Visitor Survey went fishing whilst in the area.
- However, within Perthshire 15% of visitors go fishing, and the vast majority of people fishing in the area are from the UK.
- 4% of visitors to Aberdeen and Grampian and 5% of visitors to Angus and Dundee take part in fishing whilst holidaying in the area.

Skiing

- Skiing holidays generate 100,000 trips to Scotland and around £15m of expenditure. An additional £18m is generated by people on general holidays who spend some of their time at a ski area.
- Two thirds of UK skiing holiday visits come from England and around a third from Scotland (www.scotexchange.net)
- From the months November to April 9% of respondents in the Moray, Badenoch and Strathspey went skiing.
- There are five ski areas in Scotland with lifts for the downhill skier and snowboarder, three of these are in or on the boundary of the National Park.
- The season begins when there is sufficient snow and can run from November to May with the most reliable months being January, February, March and April.
- Visitors come to undertake a range of activities. Downhill skiing remains the most popular snow sport although the popularity of snowboarding has increased in recent years.
- Variable weather has meant that the number of days it is possible to ski in Scotland has fluctuated dramatically over the last ten years. The strong lure of the European and North American ski destinations means this market is fiercely competitive. This points towards an opportunity to position skiing as an addition to an activity based trip, rather than as a stand-alone product.
- Urban locations such as Glasgow, Edinburgh, Aberdeen, Manchester and Newcastle offer the best potential, although some visitors do come from

further south including Birmingham and London. Less than 1% of winter visitors are from overseas. Greatest interest in skiing is from the younger age groups i.e. the 15 to 34-year-olds. (www.scotexchange.net)

Wildlife Tourism Enthusiasts

- Wildlife tourism covers visits to natural wildlife habitats or watching wildlife on land and/or sea. Bird watching is the primary activity of this market, however, the watching of marine-based wildlife - such as whales, dolphins, seals and otters - is also becoming increasingly popular. Wildlife tourism generates £57m and supports around 2000 jobs in Scotland.
- There is potential for the development and marketing of wildlife tourism in Scotland. Bird watching is estimated to be the fastest growing outdoor pastime in the world, with wildlife watching growing by approximately 10-12% per annum in the international market.
- Evidence suggests that wildlife watchers tend to be relatively affluent, well-educated, mature and environmentally focused. The primary market segment involved in wildlife tourism would best be described as "empty nesters" whose children have left home, aged 40-59, travelling as couples, with good levels of disposable income (www.scotexchange.net)
- The Cairngorms Visitor Survey 2003/04 found that 9% of visitors to the National Park were taking part in field study/nature study/bird or wildlife watching, on their own. A further 2% were taking part in a group field nature study/bird or wildlife watching.
- They tend to use upmarket B&Bs or small, independent hotels, ideally located for their range of environmental interests. The visitor to Scotland enjoying a wildlife experience will also be looking for a well-rounded package of other natural and cultural interests. (www.scotexchange.net)
- Within Badenoch and Strathspey the Highland Visitor survey identifies that 8% of visitors take part in watching marine wildlife, a further 18% would visit a wildlife attraction/park and 22% take part in bird watching.
- One quarter (25%) of UK visitors to Aberdeen and Grampian were found to partake in field/nature study. A further 24% of UK holiday trips to Perthshire were found to be taking part in field/nature study, and 17% of UK visitors to Angus and Dundee also take part in field/nature study. (www.scotexchange.net)

Short Breaks

- Research over the recent years has shown a definite international trend towards taking shorter main holidays, and for holidaymakers to take several shorter breaks during the year.
- The traditional two-week summer holiday is becoming less important for many people. There are thought to be a number of social trends affecting the marketplace, including for example:
- It is generally accepted that Scotland will not recover its former position as a main holiday destination, but on the other hand there is the opportunity to capitalise on the growing tendency to take short breaks and to utilise spare capacity outwith the peak season. (www.scotexchange.net).
- The 'time squeeze' phenomenon – many people feel they have shorter windows of time in which to take holidays. Household size is falling – people have more to spend and are less constrained by school holidays. An ageing population – with more time to take more breaks.

Activity Based Holidays

- During 2002 2.2 million activity holiday trips by UK residents in Scotland were taken, spending totalled £575 million, and 9.2million bednights.
- The average length of stay is 4 nights.

- Within the UK market, Scottish residents undertook 42% of trips whilst 50% were English visitors.
- 68% of all visits were by car.
- Activity holidaymakers in Scotland in 2001 were mainly males (54%), aged between 25 and 34 (24%) and likely to be in the ABC1 social classes (67%) (UK Residents Survey – Activity Holidays in Scotland, 2001, www.scotexchange.net).

Conference and Events UK

- The overall value of the conference market is estimated at around £6.6 billion in the UK.
- Around a quarter of meetings and conferences involve delegates having an overnight stay at the venue (23%).
- Three-quarters of non-residential conferences last one day (73%) while a larger proportion of residential conferences last two or more days (78%).
- Overall, around half of all conferences are classified as corporate events (48%), 32% are government events and 20% are association events.
- Overall, a third of all conferences are booked through a professional conference organiser or a venue finding agency (33%). A slightly higher proportion of residential conferences are booked using this method (37%). See appendix 5 for details of the conference product.

Royal Watching

- The Royal Family has proved a long-standing magnate for UK tourism. The pageantry, history and tradition encourages certain markets, particularly the US, to visit areas with royal links. The Park has obvious benefits on which to maximise opportunities. The long established royal connections in Deeside provide a huge draw for visitors to the area.

Health & Wellbeing

- There is a growing interest in holidays where relaxation and health are the focus as well as a rising interest in 'well-being'. This reflects a growing trend of involvement in fitness activities and increasing interest in more 'alternative' lifestyles and therapies. (www.scotexchange.net).

Appendix 5 – Conferencing Facilities

Below are a list of some of the main conferencing venues in the Park area, there are also a number of small establishments that offer conferencing and meeting facilities.

Aviemore Highland Resort
- 1,000 maximum capacity theatre style
- 7 meeting rooms
- 208 bedrooms

Hilton Coylumbridge, by Aviemore
- 800 maximum capacity theatre style
- 1 meeting room
- 175 bedrooms
- 4 star accommodation

Hilton Aviemore
- 250 maximum capacity theatre style
- 7 meeting rooms
- 88 bedrooms
- 4 star accommodation

Boat of Garten Hotel
- 80 maximum capacity theatre style
- 3 meeting rooms
- 32 bedrooms

Rothiemurchus Estate, by Aviemore
- 70 maximum capacity theatre style
- 4 meeting rooms
- 4 – Star Visitor Attraction

Alvie Estate, Kincraig
- 60 maximum capacity theatre style
- 3 meeting rooms
- 10 bedrooms

The Aviemore Inn
- 60 maximum capacity theatre style
- 1 meeting room
- 62 bedrooms
- 3 – Star accommodation

Cairngorm Mountain Ltd
- 30 maximum capacity theatre style
- 2 meeting rooms
- 4 – Star Visitor Attraction

Hilton Craigendarroch, Ballater
100 max capacity theatre style
4 meeting rooms
45 bedrooms
4 star accommodation

Monaltrie Hotel, Ballater
80 max capacity theatre style
3 meeting rooms
25 bedrooms
2 star accommodation

Invercauld Arms, Braemar
60 max capacity theatre style
1 meeting room
68 bedrooms
3 star accommodation

Mar Lodge, Braemar
60 max capacity theatre style
5 meeting rooms
self catering lodges
4 star accommodation

Gordon Hotel, Tomintoul
60 max capacity theatre style
2 meeting rooms
29 bedrooms
3 star accommodation

Richmond Hotel, Tomintoul
30 max capacity theatre style
1 meeting room
22 bedrooms

Glen Lui Hotel, Ballater
30 max capacity theatre style
2 meeting rooms
19 bedrooms
4 star accommodation

Fife Arms, Braemar
30 max capacity theatre style

Appendix 6 – MBSE Highland Visitor Survey

Moray, Badenoch and Strathspey

Visitor Profile:

	Moray	Badenoch & Strathspey	Moray, Badenoch & Strathspey	Total Survey
Scotland	**36%**	**47%**	**43%**	**35%**
Highlands	6%	12%	10%	9%
Edinburgh	3%	8%	6%	6%
Glasgow	6%	6%	6%	5%
Grampian	10%	7%	8%	4%
England	**36%**	**35%**	**35%**	**37%**
South East	10%	9%	10%	11%
North East	8%	8%	8%	8%
Midlands	8%	8%	8%	7%
North West	4%	5%	5%	5%
Other UK	**2%**	**2%**	**2%**	**2%**
Total – overseas	**26%**	**16%**	**19%**	**26%**
Europe	**15%**	**10%**	**11%**	**16%**
Germany	6%	3%	4%	6%
Non-European	**11%**	**6%**	**8%**	**10%**
USA	6%	3%	4%	4%

Scottish visitors are particularly important to Moray, Badenoch and Strathspey with 43% (versus 35% of all Highland respondents) of all visitors coming from Scotland, and 10% coming specifically from the Highlands (versus 9%). Just over a third of both Moray, Badenoch and Strathspey (35%) and Highlands (37%) respondents are from England, although Moray, Badenoch and Strathspey has fewer continental European (11% versus 16%) and non-European (8% versus 10%) visitors than the Highlands.

	Moray	Badenoch & Strathspey	Moray, Badenoch & Strathspey	Total Survey
Age				
15-24	3%	6%	5%	7%
25-34	15%	15%	15%	17%
35-44	12%	25%	20%	21%
45-54	22%	23%	23%	20%
55-64	26%	16%	20%	19%
65+	21%	14%	17%	15%
Gender				
Male	50%	51%	51%	55%
Female	50%	49%	49%	45%
Working Status				
ABC1	55%	54%	55%	53%
C2DE	19%	24%	22%	21%
Non-Working	23%	20%	21%	22%
Refused	4%	3%	3%	4%

Appendix 7 – Angus and Dundee, Summary of Visitor Survey

General Visitor Statistics – Angus and Dundee 2001

1. Type of holiday –
   (1) UK Tourist Trips:
      a. Away from home on holiday – 70%
      b. Day out from home – 1%
      c. Visiting friends/relatives – 18%
      d. On business away from home – 11%

   (2) Overseas Tourist Trips:
      a. Away from home on holiday – 49%
      b. Day out from home – 0%
      c. Visiting friends/relatives – 29%
      d. On business away from home – 22%

2. 63% of visitors from Scotland, 26% from England, 2% from Northern Ireland, 1% from Wales and 8% from Overseas.
3. Age Profile of visitors:
   (1) UK Tourists: 16-24years – 14%
   25-34years – 33%
   35-44years – 12%
   45-54years – 19%
   55-64years – 16%
   65+ years – 6%

   (2) Overseas Tourists: 16-24years – 9%
   25-34years – 16%
   35-44years – 19%
   45-54years – 28%
   55-64years – 16%
   65+ years – 10%
4. 62% of (UK) visitors were ABC1s – (AB 37% ; C1 25% ; C2 22% ; and DE 16%)

5. Two key influences on the decision to visit Angus and Dundee were:
   (1) UK Tourists – Visiting castles, monuments and churches (30%) and Watching performing arts/cinema (23%)
   (2) Overseas Tourists – Visiting castles, monuments and churches (37%) and Visiting museums, galleries, etc. (27%)
6. No information was available on Tourist Brochure influence, but 87% of visits (by UK Tourists) were repeat visits.

Appendix 8 – Aberdeen and Grampian Summary of Visitor Survey

General Visitor Statistics – Aberdeen and Grampian 2001

7. Type of holiday –
   (1) UK Tourist Trips:
      a. Away from home on holiday – 54%
      b. Day out from home – 2%
      c. Visiting friends/relatives – 12%
      d. On business away from home – 32%

   (2) Overseas Tourist Trips:
      e. Away from home on holiday – 53%
      f. Day out from home – 0%
      g. Visiting friends/relatives – 27%
      h. On business away from home – 20%

8. 58% of visitors from Scotland, 32% from England, 1% from Northern Ireland, 3% from Wales and 6% from Overseas.
9. Age Profile of visitors:

(1) UK Tourists:	16-24years – 7%
	25-34years – 22%
	35-44years – 32%
	45-54years – 17%
	55-64years – 13%
	65+ years – 9%
(2) Overseas Tourists:	16-24years – 8%
	25-34years – 26%
	35-44years – 17%
	45-54years – 24%
	55-64years – 14%
	65+ years – 8%

10. 60% of (UK) visitors were ABC1s – (AB 30% ; C1 30% ; C2 22% ; and DE 18%)

11. Two key influences on the decision to visit Aberdeen and Grampian were:
    (1) UK Tourists – Visiting castles, monuments and churches (32%) and Visiting museums, galleries, etc (22%)
    (2) Overseas Tourists – Visiting castles, monuments and churches (83%) and Visiting museums, galleries, etc. (58%)

No information was available on Tourist Brochure influence, but 90% of visits (by UK Tourists) were repeat visits.

Appendix 9 – Competitor Analysis

Tourists are no longer satisfied to visit a series of individual attractions or events. They want hassle-free, learning and nurturing holidays. There is evidence that visitors rely much less on interesting chance encounters. Instead, planned itineraries are very much more the order of the day. Packaged information – as opposed to packaged holidays – will allow informed choices to be made, and allow visitors to devise bespoke, self-determined visits, each unique and suited as closely as possible to their individual needs. It's therefore increasingly likely that visitors will follow a pre-determined route, making best use of their time in order to experience as much as possible that falls within their sphere of interest.

Cluster Marketing
Businesses therefore that collaborate, and work together to direct like minded visitors around each other have found greater take-up, and are able to develop products focussed on specific themes whether of a historic, cultural or environmental nature. Themed products serve to differentiate destinations in a crowded market place as well as enhance the likelihood of repeat visits.

However, the concept of businesses acting together in the same way also referred to as "cluster marketing" is recognised elsewhere, and is not unique within the National Park area. Other locales may employ the technique to attract custom. Examples that may target the same UK and international markets as the Cairngorms National Park are likely to be:

- Other UK National Parks particularly Loch Lomond & the Trossachs
- Other scenic parts of Scotland particularly outdoors 'iconic areas' such as Glencoe, Loch Ness and Skye
- Locations in Ireland & continental Europe
- Activity Based Holidays

UK National Parks

The English National Parks cover almost 7% of the country, attracting more than 70 million visitors every year and are home to 175 000 people (www.defra.gov.uk). As such they are seen as competitors for Cairngorms National Park.

1. **Northumberland** (www.nnpa.org.uk) – 'the land of the far horizons'
2. **Lake District** – (www.lake-district.gov.uk) - Covering 880 square miles, the Lake District National Park is the largest, and most visited of Britain's 11 National Parks.
3. **Yorkshire Dales** (www.yorkshiredales.org.uk) - the National Park covers 1,773 square kilometres of countryside. Over 20,000 residents live and work in the National Park. The area is also visited by over 8 million visitors every year who come to see the landscape and wildlife, as well as experience village life in places such as Grassington, Burnsall, Dent and Muker.
4. **North York Moors** (www.northyorkmoors-npa.gov.uk) – more than 50 years of being a national park. The North York Moors sells itself on the great variety of landscapes within a small area.
5. **Peak District** (www.peakdistrict.org) – the first national park to be set up in England. Situated between Sheffield and Manchester, sold as somewhere to get away from it all.
6. **Broads** (no official site) – a network of rivers and lakes in Norfolk and Suffolk.

7. **Exmoor** (www.exmoor-nationalpark.gov.uk) - Exmoor National Park is situated in the counties of Devon and Somerset in South West England; Exeter is 40 km (30 miles) to the south and Taunton 20 km (13 miles) from the eastern boundary.
8. **Dartmoor** (www.dartmoor-npa.gov.uk) - Dartmoor was designated one of the National Parks of England and Wales in 1951. It is a beautiful moor land landscape with wooded valleys and wind swept Tors. 368 square miles (953 sq. km.) in area, with about 33,000 people living in it, and where about 10 million visits are made each year. Dartmoor is a rich habitat for wildlife and has a wealth of archaeological remains.
9. **Brecon Beacons** (www.breconbeacons.org) - The Brecon Beacons National is a 'working' landscape. Sold on its harmonious blend of natural beauty and human history.
10. **Snowdonia** (www.snowdonia.org.uk) – sold on the landscape and the wealth of outdoor activities available.
11. **Pembrokeshire Coast** (www.pembrokeshirecoast.org.uk) – Britain's only truly coastal national park
12. **Loch Lomond and the Trossachs** (www.lochlomond-trossachs.org) - Scotland's first National Park was set up in July 2002. Loch Lomond and the Trossachs sell the National Park area as a place to get away from it all, yet less than an hour from Glasgow and little further from Edinburgh.

Loch Lomond & the Trossachs National Park
Loch Lomond & the Trossachs, Scotland's first National Park, was set up in July 2002. To capitalise on the diversity and unique assets of the park, the area is offered to the visitor as a place to get away from it all, yet less than an hour from Glasgow and a little over that from Edinburgh. The Park is also presented on its four distinctly different areas:

- Ben Lomond standing guard over Loch Lomond, the largest expanse of freshwater in Great Britain;
- The Trossachs, wild glens and sparkling lochs between Callander and Aberfoyle;
- Breadalbane, the high country of the north, with some of Scotland's finest Munros, Ben Lui, Ben Challum, Ben More and Ben Vorlich;
- The Argyll Forest of the Cowal Peninsula watched over by the Arrochar Alps and bordered by sea lochs.

Glencoe - The product encompasses a variety of small villages namely, Glencoe, Ballachuillish, Kinlochleven, Onich and Duror, the area can be described as 'South Lochaber'. Within the area the product includes a natural environment, a dramatic landscape and a large selection of outdoor pursuits. A variety of visitor attractions, a range of accommodations and entertainments, all complimenting the natural environment that is Glencoe.

Skye - a variety of regions / small communities offering, a very rich culture & heritage. A dramatic landscape and a large selection of outdoor pursuits with a variety of visitor attractions, a range of transport methods to Skye and 'island hopping' from Skye. Highland hospitality and a range of accommodation to suit all tastes and budgets. Food & Drink produced and served with a distinctive flavour of Skye & Lochalsh. A variety of 'cottage industry' type businesses and service sector businesses all supporting the tourism product in the area

Loch Ness - The Loch Ness product encompasses a variety of different areas / small communities offering a product described as follows:

- The mystery, myth and legend of the Loch Ness Monster
- A rich culture & heritage
- A natural environment, dramatic landscape
- The Caledonian Canal
- The Great Glen Way and a selection of outdoor pursuits
- A variety of visitor attractions including Urquhart Castle and the Loch Ness Monster exhibitions
- Highland hospitality at a range of accommodation to suit all tastes and budgets

A variety of ‘cottage industry’ type businesses and service sector businesses all supporting the tourism product in the area

Activity Based Holidays

- During 2002 2.2 million activity holiday trips by UK residents in Scotland were taken, spending totalled £575 million, and 9.2million bednights.
- The average length of stay is 4 nights.
- Within the UK market, 42% of trips were undertaken by Scottish residents whilst 50% were English visitors.
- 68% of all visits were by car.
- Activity holidaymakers in Scotland in 2001 were mainly males (54%), aged between 25 and 34 (24%) and likely to be in the ABC1 social classes (67%).

(UK Residents Survey – Activity Holidays in Scotland, 2001, www.scotexchange.net)

This is a growing market and throughout the UK companies have seen the potential and want to capitalise on this niche market.

Appendix 10 – Future Trends

Scotland's visitor profile continues to mature, but will be more educated and affluent. They are increasingly active, well travelled, and have high expectations of customer service and value for money. Some visitors will take breaks all year round, while others leading busy and stressful lives will have limited time to spend.

Last minute bookings will be the norm. More people will travel alone or as couples without children. They will want new cultural and environmental experiences, as well as opportunities for learning, self-improvement or pursuing a hobby.

More women are travelling for both leisure and business and, despite an average increase in age, there will be more affluent young visitors to Scotland. Increasingly, travellers will use the Internet to book holidays as well as for comparing destinations and prices.

World-wide lifestyle trends show that by 2005 Scotland's visitors will be older, educated and affluent, active, well-travelled, and have high expectations of customer service and value for money. Some visitors will take breaks all year round, while others leading busy and stressful lives will have limited time to spend.

Knowing the Customer
There are many competitors offering similar products to the same visitors. It is important to know who your competitors are and know what they are doing and how they are doing it. Most importantly, know the customer and their needs. Meeting visitors' needs is crucial.

Stressed, short of time
Trying to help reduce pressures by ensuring that a guests stay lives up to expectations. Any promises made about "easy-to-find" or "beautiful garden" must be fulfilled.

Lots of up-to-date, local knowledge about places to go, things to see, where to eat as well as a guide to prices and travel times will be well received.

Visitors seeking new experiences
People will increasingly want to make their travel more of an experience - a way of learning about different cultures and countries. They will demand that hotels have distinctive characteristics, reflecting their locality or an individual identity, and they will want to try local activities.

Creating time
Hotels will be expected to help guests deal with their increasingly time pressured lives. One-stop customer service teams will become more common - booking restaurants and day trips, giving information on the local area and replacing the forgotten toothbrush.

Maximising on-line communications
More and more visitors will use the Internet to select and book their hotel. Travel information is the most sought after subject on the Internet. An Internet presence will be an absolute necessity, as it allows independent hotels to compete for business with the international chains.

Joint Marketing
Joint marketing groups will help in raising visibility and bring in additional business.

Activity Providers
More last minute booking
With increasingly busy and stressful lives, the decision-making process for holidays is becoming much shorter and more spontaneous. Be prepared for last minute bookings which will increasingly be made on line, and have mechanisms in place to respond quickly.

Growth in short breaks
Shorter breaks are becoming the norm especially in the UK market. Be prepared to be flexible in what you can offer and when you can offer it. You might want to think about developing specific short break packages that combine an activity, accommodation and/or transport. Special or limited offers can be used to attract business at specific times or in quieter periods. The need to provide a value for money experience will continue to be important.

Technology is here to stay
Growth in the use of mobile phones and the Internet is well documented. The importance of having a visible, easily accessible website cannot be overstated. Increasingly, the web will be used for booking holidays, but it is already used to research holiday information and get ideas. Remember you are selling a holiday experience. So, the more you can tell a visitor about what else there is to do and see in the area, how to get there and what it will cost, the more likely you are to secure that booking and keep them in the area longer. The immediacy of technology means that a quick response is vital. Visitors expect a response in 24hrs and you need to plan how you can do this.

The personal touch is important
Think about what makes your business unique and make sure your customers knows what that is. It could be location, the type of activities you offer, your staff qualifications etc. As a small business one of the things which can distinguish you from the crowd is your quality of service. A willingness to tailor what you offer to the visitor's needs and to go that second mile can make all the difference. Building relationships with customers before they come and after they go home can help you learn about who they are and what they are looking for, as well as persuade them to return. Encourage feedback from customers (and staff) to continuously improve what you are doing and the way you do it.

Work in partnership
In a world where your competitors are going after the same customers, it is important to look at ways of working together locally, both to improve your own product and enhance the visitor's experience. Think about other local businesses and how you can work together to the benefit of everyone. This might be working up a special offer together, joint marketing or simply brainstorming ideas about how best to keep business in your area.

Appendix 11 – Lowland Market Research Interim Results 2003-2004

Visitors are inevitably higher daily spenders than residents, with accommodation and entertainment major factors. With most visitors away from home overnight, it was found that a narrow majority also stay in the Cairngorms area for the duration of their visit.

Traditional accommodation, hotel, bed and breakfast and self catering, accounts for most bed nights, but reasons for visiting and chosen attractions are very varied and reflect the diversity of amenity on offer in the Park. There is a propensity towards outdoor activity, again reflecting the amenity on offer.

Awareness of this and other national parks is very high, but is not a major factor in encouraging visits. However, of interest was the discovery of a visiting public who make national parks their sole or main reason for travel, bagging them as walkers might "bag munros".

- Just over half (52%) of all respondents being female with the remainder (48%) being male.
- Although there is a good overall spread of ages, there is more of a bias towards older visitors, with 81% of respondents being aged over 35 years.
- Over two thirds (71%) of all respondents are classified as social grade ABC1, 16% are C2 and the remaining 12% are classified as DE.
- The largest proportion of respondents (46%) indicates that their party was composed of 2 adults and no children. There were only 18% of respondents overall that stated they had any children in their party at all. This indicates a strong bias towards an "adult" market and experience for visitors to the area.
- Eleven percent of respondents stated that they have dogs with them on their trip.
- For visitors to the area spending a night in the Cairngorms the average spend per night per person on accommodation was £34.83.
- Spend on other items such as tourist shopping was highest, as would be expected, among visitors. Visitors spent on average £10 per person on tourist shopping whilst residents only spent £2.90 per person.
- Entertainment was another area where the visitors were inclined to spend more that residents. Visitors spend on average £3.35 per person per day on entertainment whilst residents only spent £1.00 per person per day.
- Almost two thirds (63%) of all respondents stated that they were away from home on holiday in this area. People away from home on a day trip to this area accounted for 17% of all visitors, with a further 10% being on a day trip from home of 3 hours plus.
- Fifty three percent of all respondents state that they will be spending all or most of their time in the Cairngorms area. A further 20% will spend some of their time away from home in the Cairngorms area.
- Fifteen percent are only passing through the Cairngorms area to or from their holiday destination, whilst 11% are touring Scotland and will only spend a short time in the Cairngorms area.

- Sixty six percent (1035 people) of all respondents stated that they are staying away from home for at least one night. Nineteen percent of these respondents indicate that they are staying between 1 and 3 nights away from home during this trip.
- A further 38% of these respondents are staying away for between 4 and 7 nights. Thirty four percent of respondents are staying between 8 and 14 nights with the remaining 8% staying 15 or more nights.
- With regard to people staying in Scotland the figures remain very similar to those found in the total number of nights away as summarised in the previous table. Twenty two percent of respondents are staying in Scotland for between 1 and 3 nights and a further 41% are staying for between 4 and 7 nights. Longer stays of between 8 and 14 nights are accounted for by 31% of respondents with 4% staying for more than 15 nights.
- The most regularly used type of accommodation is a hotel/motel with 34% of all respondents indicating that they had or will use this type of accommodation on their trip to the Cairngorms area. Just under a fifth (19%) of all respondents said that they had stayed in self-catering accommodation, with a further 11% staying in bed and breakfast.
- Reasons for visiting the area
  The most important reasons for visiting the Cairngorms area were as follows;
  - Walking/hill walking 13%
  - Generally like the area, positive statement 12%
  - Always wanted to visit area 10%
  - Come regularly/visit often/been before 8%
  - Visiting friends and relatives 8%
- On this trip away from home, once again the largest percentage (38%) of respondents stated that it would be general sightseeing. Over and above general sightseeing, the main activity that people state they will be participating in is some form of walking, 18% of respondents indicating that they will undertake some form of low level walking or hill walking.
- The main natural and built attractions that people have visited are as follows;
  - Cairngorm Mountain Railway 14%
  - Glenmore Forest Park Visitor Centre 9%
  - Landmark Visitor Centre 8%
  - Visitor Centre Rothiemurchus Estate 8%
  - Glen Muick 7%
  - Highland Folk Museum, Kingussie 7%
  - Loch an Eilein, Rothiemurchus Estate 7%
  - RSPB Osprey Centre, Boat of Garten 7%
- With regard to the attractions that people state that they intend to visit on their day out/visit to the Cairngorms area. The following are cited most often;
  - Balmoral 6%
  - Cairngorm Mountain Railway 6%
  - Braemar Castle 4%
  - Crathie Parish Church 4%
  - Highland Folk Museum, Kingussie 4%
  - Highland Folk Park, Newtonmore 4%
  - Lecht 4%
  - Speyside Heather Centre, Dulnain Bridge 4%

- Just under two thirds (64%) of all respondents said that they were aware that they were in a National Park. Eighty six percent stating that they knew of this prior to their arrival in the park.
- The influence of the area being a National Park over people's decision to visit the area is only cited as being very or quite important by 27% of respondents. Over half (60%) said that it was not very or not at all important and a further 11% said it was neither important nor unimportant.
- Just over three quarters (77%) of all respondents indicated that they had visited other National Parks in the United Kingdom.
- When asked to look at a list of other National Parks in the United Kingdom, the most commonly visited one was the Lake District, with 73% of respondents who had visited a National Park stating this. The next most popular parks were the Loch Lomond and the Trossachs, Yorkshire Dales, and the Peak District.

Appendix 12 – ATB Marketing Activity

In 2001 an estimated 2.9 million visitors came to the Highlands accounting for approximately 12.3 million bednights, and a visitor spend of £566 million in the area.

In 2002 UK residents took come 1.8m tourist trips to Aberdeen and Grampian and spent a total of 6.3 m bednights and £399m in the area, with the Strathdon & Deeside areas of the Park deriving a large proportion of this, second only to the Aberdeen city. Visitors from overseas took 0.1m trips to Aberdeen and Grampian and stayed 0.9m nights during 2002. overseas tourism spending in the area totalled £47m.

In 2001, UK residents took some 0.6m tourist trips to Angus and the City of Dundee and spent a total of 1.7m bednights and £71m in the area. Visitors from overseas took 50,000 trips staying 0.5m nights and spending £18m in the area.

Area Tourist Board	Marketing Activity	Description	Target Audience
HOST	Freedom of the Highlands	Full-colour A4 holiday brochure, *Freedom of the Highlands* is used to service enquiries received as a result of HOST's promotional campaigns and through the visitscotland.com National Contact Centre. Additional distribution takes place via Tourist Information Centres throughout the UK and through holiday and trade exhibitions and other outlets such as the Superfast Ferry Zeebrugge Terminal.	All Markets: o Short Breaks o Main Holidays o Escapists o Tourers o Day trippers o Relaxation
HOST	Local Visitor Guides – Aviemore, Badenoch and Strathspey	These guides are designed to service visitor enquiries for more details on what there is to see and do in the areas they are visiting. For 2003 the Local Visitor Guides each had a print run of between 100,000 and 120,000. Distribution of these guides will be through the Tourist Information Centres in the HOST area and other appropriate outlets.	Market o Short Breaks o Main Holidays o Tourers o Day trippers
HOST	Romantic Scotland	The Romantic Scotland Marketing campaign began in 2001 with the objective of promoting Scotland as a Romantic destination for weddings, romantic breaks and honeymoons.	Markets o Short Breaks o Main holidays o Romantic breaks

		As well as the website, there are brochure and PR activities.	
HOST	Walking Wild	Marketing activity includes distribution of a Scotland-wide 'awareness' brochure; a comprehensive website; a presence at consumer exhibitions in the UK and overseas; targeted direct marketing campaigns; and a significant PR campaign to raise awareness of the wide range of walking opportunities in Scotland.	o Short Breaks o Main holidays o Walking/Hiking holidays
HOST	Escape to the Edge	The Escape to the Edge campaign promotes an experience of discovering rural destinations.	o Short Breaks o Main holidays o Escapists o Relaxation o Island Visits
HOST AGTB ADTB	Highlands/ Aberdeen & Grampian/ Dundee & Angus Convention Bureau/	Membership Benefits • The opportunity to quote for conference business through our Venue Location Service. • The opportunity to meet buyers by co-hosting a Familiarisation Visit. • A free listing on the official Business Tourism website of the Highlands of Scotland • The opportunity to target 3,500 conference buyers through editorial in the bureau's twice yearly newsletter, Highlight. • Representation by bureau staff at exhibitions, • Accommodation business from our Advance Accommodation Booking Service (if relevant).	o Meetings and Conventions o Incentive Travel o Business Tourism
HOST	www.highland freedom.com	www.highlandfreedom.com attracts 1 million user sessions a year (18 million hits), which makes it the leading website for	All Markets

		holiday information about the Highlands of Scotland.	
HOST	Great Deals	Great Deals is a website that allows members to promote late availability to the consumer via the web.	o Short Breaks o Special Deals o Late Bookers
AGTB	Holiday Guide and Short Breaks	Full colour A4 publication. Aberdeen & Grampian Tourist Board's main promotional publication for the UK market.	o Leisure Breaks o Short Breaks
AGTB	Visitor Guides	Full colour A4 publication. Aberdeen & Grampian Tourist Board's "On arrival" comprehensive guide to what to do and see in the area. A special edition is also produced for display in accommodation establishments	o Leisure Breaks o Short Breaks
AGTB	www.aberdeen-grampian.com www.castlesandwhisky.com	The Aberdeen & Grampian Tourist Board website gives information on accommodation, attractions, activities, shopping and eating & drinking. There is also information on the four 'trails', news items and an extensive events database.	o Leisure Breaks o Visiting Friends and Family o Short Breaks o Member to Member
AGTB	Short Breaks website	Aberdeen & Grampian Tourist Board web site contains a section specifically devoted to short break offers.	o Leisure Breaks o Visiting Friends and Family o Short Breaks o Member to Member
AGTB	Press Trips	Aberdeen & Grampian Tourist Board acts as host to more than 60 journalists every year writing for various publications in the UK and overseas.	All Markets
AGTB	Oversees Guide	Full colour A5 brochure, produced in English, French, German, Dutch and Norwegian.	o Oversees o Visiting friends and relatives o Leisure Breaks
AGTB	4 Trails	and Grampian Tourist Board in association with Historic Scotland and National Trust for Scotland. **Victorian Heritage Trail** High quality full colour	All Markets

		broadsheet folded to A5. Suitable for businesses located in Royal Deeside and The Mearns. **Whisky Trail** High quality full colour broadsheet folded to A5. Suitable for businesses located in Speyside.	
Dundee and Angus Tourist Board	Angling in Tayside	Joint campaign. Promoted through free leaflet, detailed payable guide and website and through presence at angling exhibitions.	○ Short breaks ○ Fishing ○ Leisure ○ Outdoors ○ Business/ Conference
Dundee and Angus Tourist Board	www.angusanddundee.co.uk	www.angusanddundee.co.uk has undergone a recent redevelopment and now features easier navigation and a fuller range of search facilities and functions. The What's New section spotlights the latest campaigns and the monthly events listing keeps browsers right up to date with what's on in the area.	All Markets
Dundee and Angus Tourist Board	Tourist Information Centres	In the year 2002, Tourist Information Centres in Angus & Dundee serviced over 200,000 visitor enquiries. Promotional opportunities include Out of Hours Panels, Pillar Panels, Window Displays and Showcases, plus agency agreements.	All Markets

The Highlands of Scotland Tourist Board area:

- Aviemore
- Grantown-on-Spey
- Kingussie (seasonal)
- Newtonmore (seasonal)

Aberdeen and Grampian Tourist Board area

- Ballater
- Braemar
- Crathie (seasonal)
- Tomintoul (seasonal)

Angus and Dundee Tourist Board area

Kirriemuir (seasonal)

Marketing Activity BTA, VisitScotland

- **100% Scottish Summer Campaign** - In order to capitalise on the growing domestic market and the increasing number of people who have not yet made a decision about their 2003 holiday destination. Aimed at the Scottish domestic market, the campaign will encourage people in Scotland to holiday at home and experience what Scotland has to offer.
- **Adventure Scotland -** this campaign is targeted at 18 – 35 year old Scots, and uses two main elements – Radio and Press.
- **Surprising Scotland** - this campaign aims to tell people things they didn't already know about Scotland and things to see and do which may surprise and inspire them to get out and about this summer.
- **International Marketing Walking Promotion -** European visitors are increasingly interested in active pursuits as an integral part of their holiday and we are actively targeting that trend. While more dedicated walking holiday-makers are choosing Scotland, those who are on a more general touring itinerary also love to build in some walking.
- **WTM** - Scotland has a major presence at the World Travel Market (WTM) in London. Over 29,000 visitors attend over the 4 day exhibition.
- **VisitScotland Expo** - The oldest established trade fair in the UK, VisitScotland (formerly Scotland's Travel Fair) is held annually in April and brings 500 UK and 500 international industry buyers and press to meet with approximately 250 Scottish exhibitors.
- **Op Pad** - ANWB, the Dutch equivalent of the AA organise the show, which is the largest outdoor activity show in the Netherlands. Suitable for activity tour operators, the accommodation sector, visitor attractions and carriers.
- **Walking Wild Campaign –** www.walkingwild.com - A direct mail sent to approx. 40,000 UK names with an interest in walking. 150,000 inserts be placed in 3 specialist/relevant magazines: The Rambler, Country Walking and BBC wildlife.
- **Cycling Scotland –** www.cycling.visitscotland.com - direct mail will be sent to approx. 40,000 UK names with an interest in cycling. 100,000 inserts will be placed in 3 specialist/relevant magazines: Cycling World, Men's Health, and CTC.
- A series of over 20 travel and consumer trade shows including British Travel Trade Fair, FITUR Madrid and BIT Milan
- **Active Scotland** - Made up of a combination of direct mail (DM's) and inserts in specialist magazines for each activity. The fulfilment to these DM's and inserts will include the relevant activity brochure and a campaign-specific map, including special offers from commercial partners and Scottish trade.
- **Consumer Campaign in Germany, France and the USA –** aiming to get more people from these countries to visit Scotland for their holidays.