

CAIRNGORMS NATIONAL PARK AUTHORITY

FOR DECISION

Title: CAIRNGORMS TOURISM ACTION PLAN: ANNUAL UPDATE

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Purpose

To review annual progress with delivery of the Cairngorms Tourism Action Plan and look forwards to priorities in the year ahead.

Recommendation

That the Board:

- a) notes that the European Charter for Sustainable Tourism in Protected Areas has been re-awarded to the Cairngorms National Park for third time
- b) notes progress with delivery of the Cairngorms Tourism Action Plan and that the next report will be brought in March 2019
- c) notes plans being made for Visitor Survey in 2019/20
- d) agrees a Board Member to Chair the Cairngorms Tourism Partnership after April 2018

Strategic Context

1. In 2005 the Cairngorms National Park became the first National Park in the UK to be awarded the European Charter for Sustainable Tourism in Protected Areas and, in 2011, the new strategy was re-evaluated and the Charter was awarded again.
2. The European Charter was originally developed in 1995, following the ground-breaking report "Loving Them to Death" which called for a sustainable approach to

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tourism development and management in Europe's protected areas. An accessible guide to the benefits, conditions and guidelines to the Charter can be found here http://www.europarc.org/wp-content/uploads/2015/12/ECST_2015.pdf. The Charter is a practical management tool that enables Protected Areas to develop tourism sustainably, based on five Principles:

- a) Giving priority to protection
- b) Contributing to sustainable development
- c) Engaging all stakeholders
- d) Planning sustainable tourism effectively
- e) Pursuing continuous improvement

3. Scotland's national tourism strategy, Tourism Scotland 2020 was launched in June 2012, with an ambition to grow visitor spend by £1bn to 2020. The strategy was developed to target those markets that offer Scotland the greatest growth potential, to collaborate within and across Scotland's tourism destinations and to develop the authentic memorable experiences today's visitors seek, delivered to the consistently high quality they expect. The Strategy was reviewed in 2016 with renewed emphasis on 4 four priorities:
 - a) Strengthen Digital Capabilities
 - b) Strengthen Industry Leadership
 - c) Enhance the Quality of the Visitor Experience
 - d) Influence Investment, specifically flight access & transport connectivity, built infrastructure, digital connectivity and business growth finance
4. Within the last year there has been significant publicity about the potential for tourism to develop in an unsustainable manner. For example, in Barcelona and Balearic islands there has been a significant backlash from local people against tourism development. Within Scotland there has been considerable debate about excessive pressure from tourism accommodation in central Edinburgh; while on Skye, and along North Coast 500 route, the rapid growth in visitor number has put very significant pressure on very fragile infrastructure. In response to such concerns, Scottish Government has announced development of a Tourism Infrastructure Fund of £6m over two years to be launched in Spring 2018.
5. Around about the Cairngorms National Park there have been continuing developments in the development and management of tourism that can affect the National Park, for example:
 - a) VisitAberdeenshire continues to develop with a new Chief Executive, Chris Foy, appointed in August 2017. A new destination strategy is currently being developed; a major construction project for cruise liners in Aberdeen will bring new visitors to the National Park.

- b) MoraySpeyside Tourism continues as a part of Moray Chamber of Commerce, and is tasked with assisting the tourism industry in to achieve the strategic vision for 2025. Proposals for a new touring route, “North East 250” were launched at their recent conference which comes into the National Park and has overlap with the Snow Roads Scenic Route.

European Charter re-accreditation

- 6. The Board approved the Tourism Action Plan in December 2016 and the National Park Partnership Plan in May 2017 which together formed the basis for our re-application for accreditation under the Charter.
- 7. The verification visit took place in early June 2017 and was undertaken by specialists from Spain and Latvia. The programme involved an intensive three day programme of meetings and visits involving key organisations including the Cairngorms Business Partnership, individual businesses and other members of the Cairngorms Tourism Partnership. Several CNPA Board members met with the verifiers during the programme.
- 8. The decision letter was received from Europarc in October and noted the unanimous approval by the relevant Committee that the Cairngorms NP should be re-accredited. The letter highlighted the positive changes that have taken place in the Cairngorms over last five years including the work on a marketing strategy, visitor flows and distribution, the strong partnership with the representative business organisation and the involvement of local communities. The verifiers’ full report was received in November and the conclusions and recommendations are attached at **Annex I**. These recommendations will be discussed at the next Cairngorms Tourism Partnership meeting in February 2018.
- 9. The Award ceremony for the Charter will be held in Brussels on 7 December when awards will be made to 21 destinations, expanding the network to 20 countries. CNPA are the only participant in the event from the UK and is one of only two destination management authorities that have been invited to make a presentation about their work. The Cairngorms National Park is the only accredited sustainable destination under the scheme within Scotland.

Delivery of the Tourism Action Plan

- 10. The Cairngorms Tourism Partnership (CTP), chaired by Paul Easto, brings together the key businesses, organisations, and agencies involved in tourism in the Cairngorms National Park. The partners prioritise action on an annual basis, lead delivery, and are accountable for and monitor change over the five year period of the Plan. A lead

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partner has been agreed for each action in this Plan and is responsible for leading and reporting on delivery against these actions.

11. The Cairngorms Tourism Partnership, met twice during the last year and along with planning and monitoring activity, the key topics discussed were:
 - a) Scoping of a Visitor Giving scheme
 - b) A9 Dualling Project and Tourism
 - c) Snow Roads Scenic Route
 - d) Visitor Information Provision
 - e) Collection and use of Visitor Data

12. An assessment of delivery against the actions set out in the Tourism Action Plan is provided at **Annex 2**. There are challenges in reporting and planning on work by calendar years and it is proposed to bring future annual report 1 on March 2019 for financial year.

13. Paul Easto is standing down from the CNPA Board in April 2018 and so a new Chair for the Partnership will be required.

14. The relevant research that has become available over the last year has also shown that:
 - a) In 2016 there were 1.8M tourism visits to the Cairngorms, an increase of 5.4% on 2015 figures. This was driven largely by day visits rather than overnight stays, but the economic value of tourism still rose 4.8% to £252 million. (*STEAM 2016*).
 - b) Visitor satisfaction remains high compared to other Scottish destinations, with an 'overall experience' rating of 8.9/10 and 'likelihood to recommend' rating of 9.1/10. (*Scotland Visitor Survey 2015/16 CNP regional report*)
 - c) The economic value of tourism in National Parks is far greater in Scotland than in the rest of the UK, with Scotland attracting only 4% of visits to UK National Parks, but 8% of the total economic impact. (*UK National Parks Visitor Characteristics Report 2017*)
 - d) Short-term business confidence is at its highest level since 2014. Medium-long term confidence has dipped from the high of 2015-16, despite better business performance and better expectations of future performance. It would be reasonable to attribute this dip in confidence to wider political uncertainty particularly surrounding Brexit arrangements. (*Cairngorms Business Barometer Annual Report 2016/17 – average of 11% response rate*)
 - e) When tourism businesses were asked to rate the support provided by external organisations (Figure 1), all organisations have generally improved over time and the rating for CNPA compares favourably with other public sector

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organisations. (*Cairngorms Business Barometer Annual Report 2016/17 - average of 11% response rate*)

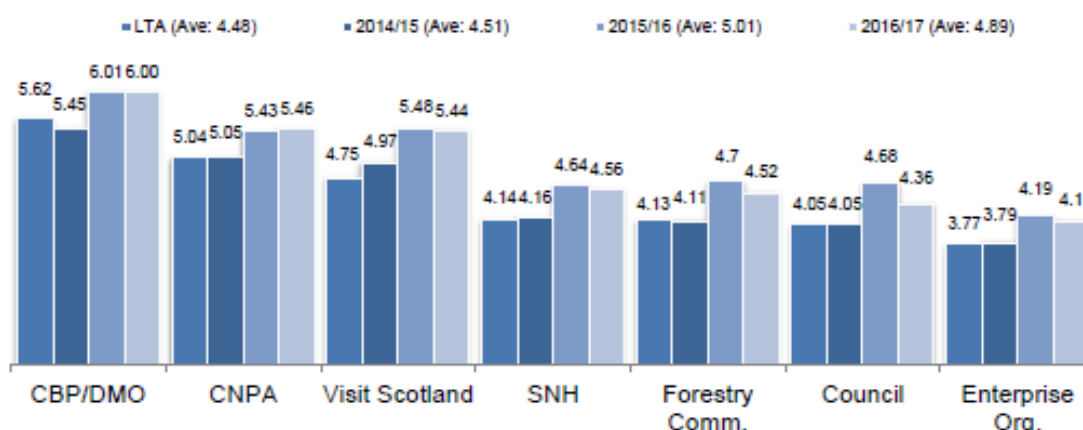


Fig 1. Rating (out of 10) of support given by external organisations

15. Other key highlights to note about our work over the last year are:

- a) Cairngorms Business Partnership (CBP) – the CBP continues to grow and now has 375 members. This represents about 35% of businesses and compares very well with average Chamber of Commerce participation level of 8-10%. CBP continues to work on promoting the National Park, supporting projects and representing their member’s interests. CBP also works pro-actively with neighbouring private-sector destination management organisations and has been influential in drawing in investment from Scottish Enterprise and other partners for projects such as the Snow Roads Scenic Route.
- b) Marketing – CNPA are again funding, along with VisitScotland, a dedicated Cairngorms marketing campaign, in consultation with the Cairngorms Business Partnership, Moray Speyside Tourism and VisitAberdeenshire. This year’s campaign will promote the Snow Roads Scenic Route and will start in March 2018 once the Snow Roads website is populated with content to be gathered by the CBP as part of the Scottish Enterprise funded Snow Roads Project. Target audiences, messages and media for the campaign will be developed using by the recently completed research report. We also continue to provide content for other VisitScotland campaigns and publications as appropriate.
- c) Make it Yours – 212 visitor-facing staff have undertaken this short awareness training course that focuses on linking the special qualities of the National Park to what visitors want, all based on the information from the visitor survey. Feedback from both attendees and Europarc verifiers has been positive.

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- d) Outdoor Access – Low level walking is the most popular visitor activity (44% of visitors). In partnership with communities 17 ‘easy to read’ and web accessible leaflets have now been produced covering the National Park. The planning application for Speyside Way extension between Kincaig and Kingussie has been submitted with completion scheduled for 2019. Planning for extending the Deeside Way near Braemar is under way. Outdoor Access Trust Scotland (OATS, formerly COAT) are approaching half way period in the five year Mountains and People project, having upgraded 37% of paths scheduled for development in Cairngorms. CNPA and Aberdeenshire Council have worked together with the local community and land managers to improve paths, signposting and leaflets around Ballater following severe flood damage; the Council’s plans for repair of two key pedestrian bridges are advancing.

- e) Working with UK National Parks – CNPA continues to engage in the National Parks UK Tourism Officers’ Group, sharing best practice and working on joint projects where appropriate. Recently we have completed a piece of work to analyse existing visitor data for joint information on visitor characteristics, market segmentation and awareness & barriers amongst non-visitors. This information will inform any joint marketing work, and potential sponsorship opportunities through National Park Partnerships Ltd. Cairngorms National Park has had very positive feedback about the level of visitor information held and how it is used.

- f) International visits - The Interpret Europe Conference 2017 in Inverness attracted 208 participants from 27 countries to Inverness. Pete Crane gave an opening address on Cairngorms National Park and half the visitors participated in a one day field trip to either Tomintoul, or Cairngorm & Glenmore. Many other international visits by protected area managers interested in tourism took place to the Park, most recently from Finland and Croatia.

- g) Visitor information – The new Ballater Visitor Information Centre (with renovated historic station, restaurant and station square) is due to open in Spring 2018. However, VisitScotland have announced that by 2019 they will be managing only two Visitor Information Centres in the Park – Aviemore and Ballater – while the Centre in Braemar will close. Following discussion with the Cairngorms Tourism Partnership, plans are being made to strengthen the online provision of information. And CNPA have offered to enter into a light-touch partnership agreements with a range of visitor information providers in other communities. This agreement would see CNPA provide Make It Yours training and promotional material.

- h) Snow Roads Scenic Route – Cairngorms Business Partnership is now delivering the two year project, substantially funded by Scottish Enterprise, to develop the Route into a world-class visitor experience. An extensive visitor survey over summer 2017 was extremely positive indicating that overseas visitors see the journey as a three day experience and future developments will enhance this experience. In November 2017 CNPA received two Scottish Awards for Quality in Planning, including the People’s Choice Award which resulted from a public vote.

Looking Ahead to 2018/19

13. Staff are currently reviewing the National Partnership Plan and Tourism Action Plan and preparing for discussion with partners through the Partnership Delivery Group and the Cairngorms Tourism Partnership in February – key priorities for the year ahead will include:
- a) Visitor Giving Scheme: Steering Group has been established and we have good level of information about similar approaches elsewhere in the UK. We also have a number of small-scale schemes within the Park – for example, British Mountaineering Council are promoting the ‘Mend our Mountains’ national voluntary giving project and, in partnership with OATS and CNPA, has recently included Beinn a’ Ghlo (Blair Atholl) as the nominated National Parks path. We are working towards a Park-wide scheme based on a memorandum of understanding between CNPA, Cairngorms Business Partnership and the Cairngorms Trust and individual businesses. While there are sensitivities in setting up such a scheme, there is a pressing need to do so soon, building momentum over time, in order to bring in new sources of revenue.
- b) A9 dualling project and Tourism – The current consultation on the Local Development Plan Main Issues Report picks up some land-use related issues. But, as the A9 dualling project progresses, there is a need to plan more proactively for tourism, businesses and communities along whole route from Perth to Inverness. Discussions have taken place between public sector partners and a strategic approach is required.
- c) Tourism Action Plan Review: - There is need to ensure that projects identified in the TAP (see Annex 2) are starting to make progress – especially the Total Quality Destination Project and the work to deliver the strategy for Cairngorm and Glenmore.

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- d) Preparations for Visitor Survey 2019/20 - The Cairngorms Visitor Survey has been run approximately every five years since 2003, providing key insights into visitor demographics, motivations, behaviour and satisfaction. It provides crucial information for monitoring of the National Park Partnership Plan and Tourism Action Plan. We have also worked hard to make sure that the results are easily digestible and easy to use by partner organisations, local businesses and particular parts of the National Park.
- e) The next survey is due to take place in 2019/20. We plan to use similar methodology and questionnaires as the previous surveys, with around 2500 face-to-face interviews taking place at 30 different locations around the National Park. We will be consulting with staff, partner organisations and local businesses to ensure that the data gathered is as useful and meaningful as possible. We hope to tender the research contract in partnership with Loch Lomond and the Trossachs National Park Authority, as we have done on some previous occasions, to gather comparable data across both National Parks.
- f) In terms of timescale, consultation with partners will take place in early 2018, and the work will be tendered by September 2018. Research will be carried out from May 2019 until April 2020, with a final report expected in September 2020. The estimated cost will be in the region of £60k, funded from operational budgets over three financial years: 2018/19; 2019/20; and 2020/21.

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28 November 2017