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## CAIRNGORMS NATIONAL PARK AUTHORITY

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### FOR DECISION

**Title: CAIRNGORMS TOURISM ACTION PLAN: MID-TERM REVIEW**

**Prepared by: MURRAY FERGUSON, DIRECTOR OF PLANNING AND RURAL DEVELOPMENT  
PETE CRANE, HEAD OF VISITOR SERVICES**

#### **Purpose**

To review progress with the delivery of the Cairngorms Tourism Action Plan and agree priorities in the years ahead.

#### **Recommendation**

##### **That the Board:**

- a) **Notes progress with the programme of work that has been undertaken by partners to date which is delivering both the Tourism Action Plan and key actions in Cairngorms National Park Partnership Plan 2017 – 2022**
- b) **Agrees to the changes in the Tourism Action Plan which have been considered by the Cairngorms Tourism Partnership.**

#### **Summary**

This paper summarises the strategic programme of work undertaken by a range of partners to deliver the Cairngorms Tourism Action Plan and the National Park Partnership Plan as a contribution to delivery of the national strategy, Scotland Outlook 2030. The past year has been extremely challenging for everyone; the Covid-19 virus has impacted on many aspects of delivery of the original Plan. Attention of the main partner organisations has shifted significantly during the last year to supporting businesses; visitor management; maintaining community support for the visitor economy; and improving our infrastructure to cope with anticipated increased demand for outdoor recreation and the changes in visitor behaviour.

## CAIRNGORMS TOURISM ACTION PLAN

### 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 (the Charter). In 2017, when our new strategy was independently verified, the Charter was re-awarded. The Cairngorms National Park is the only destination in Scotland to hold this award, and one of only three such destinations in the UK.
2. The European 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, Scotland Outlook 2030, was launched in March 2020, just a matter of days before the dramatic impact of the Covid 19 Virus started to be felt by visitors, communities and businesses. The new strategy is based on the need for change – it placed much more emphasis on sustainable and rural tourism, climate change and addressing the impacts of visitors on our places and people. The main elements are:
  - a) **The Vision** – we will be the world leader in 21st century tourism.
  - b) **The Mission** – together we will grow the value and positively enhance the benefits of tourism across Scotland by delivering the very best for our visitors, our businesses, our people, our communities and our environment.
  - c) **Key Priorities** – our passionate people, our thriving places, our diverse businesses, our memorable experiences.
4. The 2017-22 National Park Partnership Plan includes the following Actions that relate to tourism, distributed across several Priorities:
  - a) Developing new ways, including visitor-giving, to fund infrastructure investment and maintaining and upgrading key off-road routes including Speyside Way, Deeside Way and the Core Paths network;
  - b) Delivering a consistent high quality of visitor welcome through new and improved information, support for ranger services and partnership working to support businesses, communities and visitor attractions;
  - c) Improving the visitor infrastructure in Cairngorm and Glenmore, and Tomintoul and Glenlivet;

- d) Completing the 'Snow Roads Scenic Route' and developing a similar experience along the A9;
- e) Encouraging the provision of low cost camping and motor-home sites in appropriate locations;
- f) Improving visitor transport options and information;
- g) Better co-ordination and promotion of public transport and active travel;
- h) Improving opportunities for active travel in Aviemore that deliver improved transport connections for visitors and residents; and
- i) Establishing a new spatial priority area to provide an enhanced level of future assistance/collaboration over a focused time period to the Dalwhinnie, Kingussie, Laggan and Newtonmore area from 2019/20, making the most of investment in the A9 dualling project.

### **Delivery of the Tourism Action Plan**

- 5. The coordination and delivery of the Action Plan is overseen by the Cairngorms Tourism Partnership (CTP) which comprises key private-sector destination organisations, communities, land managers and the public agencies involved in tourism in the Park. The CTP fulfils the function of a permanent "sustainable tourism forum" which is one of the key components of the Charter process. The CTP complements the work of other more specialised advisory groups for the Park including the Local Outdoor Access Forum and the Visitor Management Group.
- 6. As soon as the Covid-19 situation developed in March 2020, a Cairngorms Tourism Emergency Response Group (CTERG) was formed. The Group met, initially weekly and more recently every few weeks, and was chaired by CNPA Board member, Janet Hunter. The group comprised private sector destination organisations, local authorities and key CNPA staff.
- 7. In early 2021 the CTP agreed that, given the significantly changed environment for tourism, it would be timely to undertake a mid-term review of progress in delivering Tourism Action Plan with a view to identifying any necessary changes of emphasis at a strategic level. As part of this process an overall assessment of delivery by partners against the actions set out in the Action Plan was undertaken and is provided at **Annex I**.
- 8. Key highlights of the work to date include:
  - a) **Cairngorms Tourism Emergency Response Group:** The Group has been extremely valuable in helping respond to a rapidly developing situation and keeping key players well-informed, united and working well together across a wide geographic area. The Group has, for example, regularly

reviewed how business support was distributed, advised on communication messages and data-collection exercises, and fed into national tourism discussions.

- b) **Visitor Management:** Board members are already well aware of the extensive visitor management work that has been undertaken over the last year including recruitment and deployment of seasonal rangers, improvements to visitor infrastructure and the development of area visitor management plans. This work was developed in partnership with the Cairngorms Visitor Management Group comprising land managers, local authorities and others. A full report was provided at Board in December 2020 and visitor management plans are in an advanced state of preparation.
- c) **#CairngormsTogether Campaign:** As the Covid-19 emergency developed, there was concern in certain quarters about how to encourage the return of visitors in the summer while keeping local people and communities, employees and visitors all safe. A proactive campaign was developed to build support, develop confidence and promote the interdependence of these three critically important groups – this included development of a communications framework, production of videos, promotion using social media and regular briefings for community leaders. Further information can be found at <https://cairngorms.co.uk/wp-content/uploads/2020/06/CairngormsTogether.pdf>
- d) **Cairngorms Business Partnership:** The CBP has played an extremely valuable role over the last year in support of their members (now over 400). Their three strategic priorities are Business support, Business representation and Visitor marketing. Mark Tate, the CEO, and his small team have worked extremely hard representing businesses in national discussions about locally, proving excellent updates about the complex array of business support funds. CBP has worked very effectively in partnership with CNPA in hosting meetings with community leaders to build general support of our joint work through the CTP. Around the Park, other destination organisations, including VisitAberdeenshire and Visit Moray Speyside, have played a similar, critically important role in their areas and worked collaboratively with regards to the National Park.
- e) **National Park Visitor Survey and other data collection:** The Visitor Survey, undertaken every five years using a consistent methodology, was completed just as the Covid-19 emergency developed in spring 2020. The results were extremely positive about many aspects of the visitor experience, showing increased visitor awareness of the Park with 95% feeling welcome, 96% saying they loved the Park and 99% willing to recommend the Park to others. Toilets and public toilets were highlighted as requiring improvement. Meanwhile the Cairngorms Business Barometer, funded by CNPA, tracked business profitability and business confidence – in Q4 of 2020 88% of

businesses reported a decrease in turnover; short and medium-term confidence declined on previous quarters, whilst confidence in the longer term held firm. We contribute to work at a national level, both financially and supplying information, via the programme of research on people and nature led by NatureScot. Results of all these surveys are available at links below and will be used to help chart our green recovery work and delivery of the Tourism Action Plan.

- i. Visitor Survey summary: [https://cairngorms.co.uk/wp-content/uploads/2021/01/2019\\_2020VisitorSurvey\\_FINAL.pdf](https://cairngorms.co.uk/wp-content/uploads/2021/01/2019_2020VisitorSurvey_FINAL.pdf)
  - ii. Business Barometer: <https://str.com/cairngorms-national-park-business-barometer>
  - iii. People and nature research: <https://www.nature.scot/professional-advice/land-and-sea-management/managing-access-and-recreation/increasing-participation/measuring-participation>
- f) **Developing the visitor experience in the quieter areas of the Park:** During the period very significant progress was made, investing in tourism and the visitor experience in certain key areas. The £3.5M Tomintoul and Glenlivet Landscape Partnership project came to an end in February with 20 projects finished and a marketing strategy for the area developed. In Badenoch, a new place-based brand identity was developed, based on the cultural heritage (“Badenoch: The Storylands”); new heritage and shinty trails have been created, a new community-led website and an app launched and the Speyside Way was extended to Newtonmore. Elsewhere, along the SnowRoads Scenic Route the profile of Catearan Country was raised with arts based interpretation projects and plans for a new off-road cycling network. These initiatives are an important part of our sustainable approach and provide opportunities to spread visitors across the Park, encouraging them to stay longer and benefit local communities – such work can also help take the pressure off other crowded hot-spots.
- g) **Green Recovery Fund:** In September 2020 the CNPA and Cairngorms Trust launched the Green Recovery Fund and 13 projects were funded through grant-aid. Many of the projects were tourism related and community-led; for example, scheme funded the development of improved parking areas for access to Munros, community litter picking schemes and the safeguarding of historic castles. The CBP led on a project to improve the visitor information for campervans to the Park while the charity, Growbiz has worked up a scheme to promote the creative and arts sector better to improve its financial sustainability. Plans are being made for a further Green Recovery Fund in 2021/22.
- h) **National programme of visitor management work:** New emphasis has been given to a national programme of work due the problems caused across

Scotland in 2020. There is an overall Visitor Management Group, chaired by CEO of VisitScotland, and three sub-groups, focussing on Infrastructure (chaired by Grant Moir); Prevention and Regulation; and Communications and Marketing. The latter Group are particularly considering how to reach new audiences and develop a consistent and imaginative approach to communication of the Scottish Outdoor Access Code. There is a significant visitor management summit planned on 19 March to review the Groups' recommendations and we will work to integrate the work into the plans for the National Park.

- i) **Participation in the Charter Network across Europe:** Since hosting the Europarc conference in Aviemore in September 2018, the Cairngorms has had a significantly higher profile within Europarc for our work on sustainable tourism. Within the last year, staff and Board members have been invited to participate in a number of international networking events, for example we have shared our experience at the Europarc 2020 conference and the Iberian Sustainable Tourism workshop (both virtual events). It was evident from the discussions that many protected areas across Europe experienced very similar problems in 2020 with lack visitors and significant businesses losses in spring and then sudden influxes of new visitors and many management problems in summer/autumn. Experiences were exchanged, solutions shared and new enthusiasm was stimulated.

9. In terms of progress towards the targets set in the National Park Partnership Plan, we can report as follows:

<b>Target in National Park Partnership Plan 2017 - 2022</b>	<b>Update on progress</b>
<p>a) Increase the economic impact of visitors to eastern and southern Cairngorms National Park from 21% to 25% of the total visitor economy</p>	<p>2018: 21.9%                  2019: 21.6%* (source: STEAM)</p> <p>* <i>The 2019 STEAM figures for the Park were very positive (showing an overall increase of economic impact of visitors of 14.2% from 2018) but it should be noted this may partially be due to a review of input data in 2019. The decline highlighted against the indicator for SE of the Park should be seen in the context of a 12.6% increase in tourism economic impact for this area compared to 2018.</i></p>

<b>Target in National Park Partnership Plan 2017 - 2022</b>	<b>Update on progress</b>
b) Increase the percentage of visitors using active travel during their stay to 19% by 2022	<p>2015/16: 16%</p> <p>2019/20: 27%* (source: Cairngorms Visitor Survey)</p> <p><i>* There was large increase in those walking, up from 15% to 24% of visitors –but a slight drop in those cycling, from 7% to 5%.</i></p>
c) Maintain or improve business perceptions of NP influence customer attraction and profitability	<p>Historic average: 54%</p> <p>2020: 72%</p> <p>(Source: Cairngorms Business Barometer, Q4 2020)</p>

### **Mid-term Review and Forward Look**

10. The CTP considered all of the progress made and plans at their meeting in January 2021 and noted that attention of the main partner organisations had shifted significantly during 2020/21 to supporting businesses; visitor management; maintaining community support for the visitor economy; and improving our infrastructure to cope with anticipated increased demand for outdoor recreation, and changes in visitor behaviour. Overall, there has been a higher degree of collaboration than had ever been seen before and, despite all the challenges, very good progress has been made with delivery of the Action Plan. VisitScotland staff commented that the Park had undoubtedly strengthened its role as the premier sustainable tourism destination in Scotland as a result of all the partnership effort undertaken over the last year.
11. It was agreed that, looking forwards, some significant changes do need to be made to the Tourism Action Plan and these are presented in **Annex 2** and in summary comprise:
- a) Significantly greater emphasis on visitor management planning, ranger services and infrastructure improvements at key sites
  - b) More attention to staff training and skills development for tourism workers
  - c) Suspend the planned work on total quality destination and place emphasis on use of new technology and use of data to address specific issues and long-term management problems
  - d) Increase the emphasis on developing and promoting the visitor experience in the less developed areas of the Park (e.g. Badenoch, Tomintoul and Glenlivet, and Catearan Country to the SE the Park, etc.)

- e) Rationalise the work on visitor information and marketing to tie in with work at national level and emphasise safe and sustainable visitor experiences and consistent messaging of Scottish Outdoor Access Code by all partners.
  - f) Work on post-Covid marketing, giving more attention to domestic UK visitors in the short term.
12. It will be for each participating organisation to allocate sufficient resources in their own way to deliver these actions. The CNPA budget will be approved at the March Board meeting and is making provision for ranger services, increased capital expenditure and a new version of the Green Recovery Fund. The Cairngorms Business Partnership and Visit Moray Speyside are both making plans to benefit from the HIE Destination Development Fund which, if approved, would see them recruit new staff and take forwards several joint projects to develop the visitor economy.

### **Next Steps**

13. Once agreed, staff will write to Europarc to share the results of the mid-term review and the revised actions in the Tourism Action Plan. The next review process for the Charter starts in 2022/23 and we will wish to make sure the process is embedded within the work of preparing the next National Park Partnership Plan.
14. The next meeting of Cairngorms Tourism Partnership is in June but the Emergency Response Group and the Visitor Management Group will meet much more frequently to ensure the reopening of the visitor economy develops as smoothly as possible.

**Murray Ferguson**

**Pete Crane**

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[murrayferguson@cairngorms.co.uk](mailto:murrayferguson@cairngorms.co.uk)

[petecrane@cairngorms.co.uk](mailto:petecrane@cairngorms.co.uk)