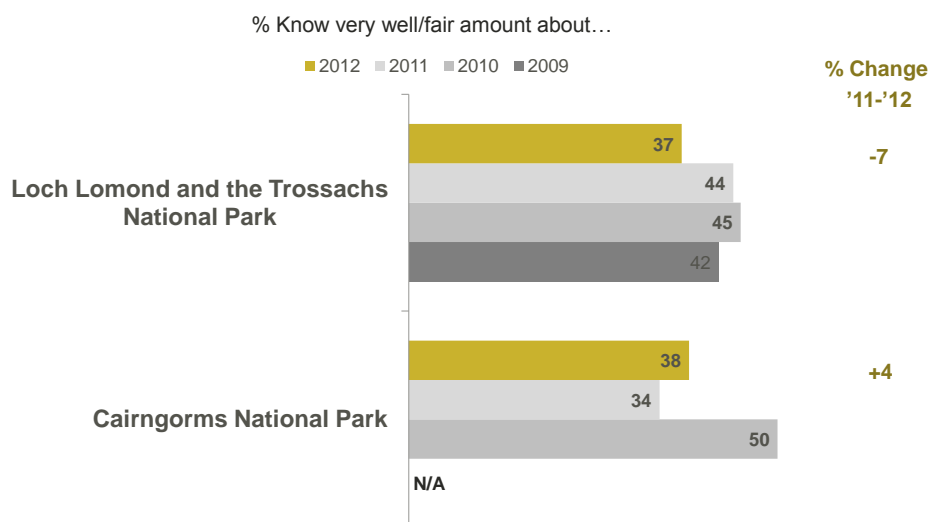


## Summary of Survey Results and Statistics to Indicate Awareness, Closeness and a Sense of Responsibility for the Cairngorms National Park.

Independent surveys carried out by an Ipos MORI poll with all MSPs (2012), SNH Omnibus (2011), the Association of National Park Associations in the UK (2012), VisitScotland Visitor Survey (2011), CBP Business Barometer (Q3 2012) and the CNPA visitor surveys (2010 & 2004) has resulted in useful indications as to how we are progressing towards achieving the three outcomes identified in the CNPA Communications & Engagement Strategy.

**MSP Survey Results** – a copy of the full report has been circulated to the Board. Below are some highlights which illustrate that awareness is increasing (following the major changes resulting from the 2011 elections) and are comparable with those of Loch Lomond and the Trossachs National Park despite 50% of Scotland’s population living within an hour’s drive of LLTTNP. Favourability results show nearly all MSPs (98%) have a positive or neutral view of both Parks and when familiarity and favourability are mapped together both Parks perform better than expected. Finally, MSPs willing to speak highly of the Cairngorms National Park is similar to last year with a slight increase by Government MSPs (+4%) but a decrease by opposition MSPs (-8%). Those who would be critical remains unchanged at 0 amongst Government MSPs but increased amongst opposition MSPs (+2%).

### Familiarity – comparison



Base: All MSPs

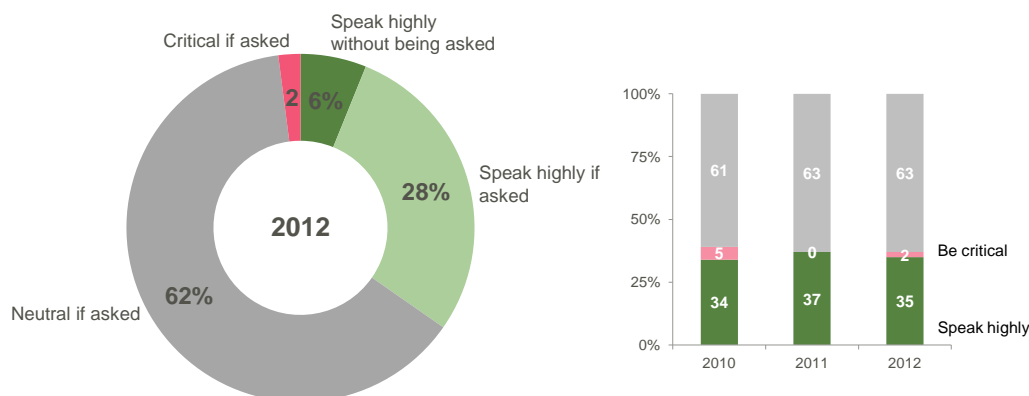
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## Advocacy

**Q. To what extent would you speak highly or critically about Cairngorms National Park?**



Base: All MSPs who have at least heard of CNP (71), 5th September – 2nd November 2012

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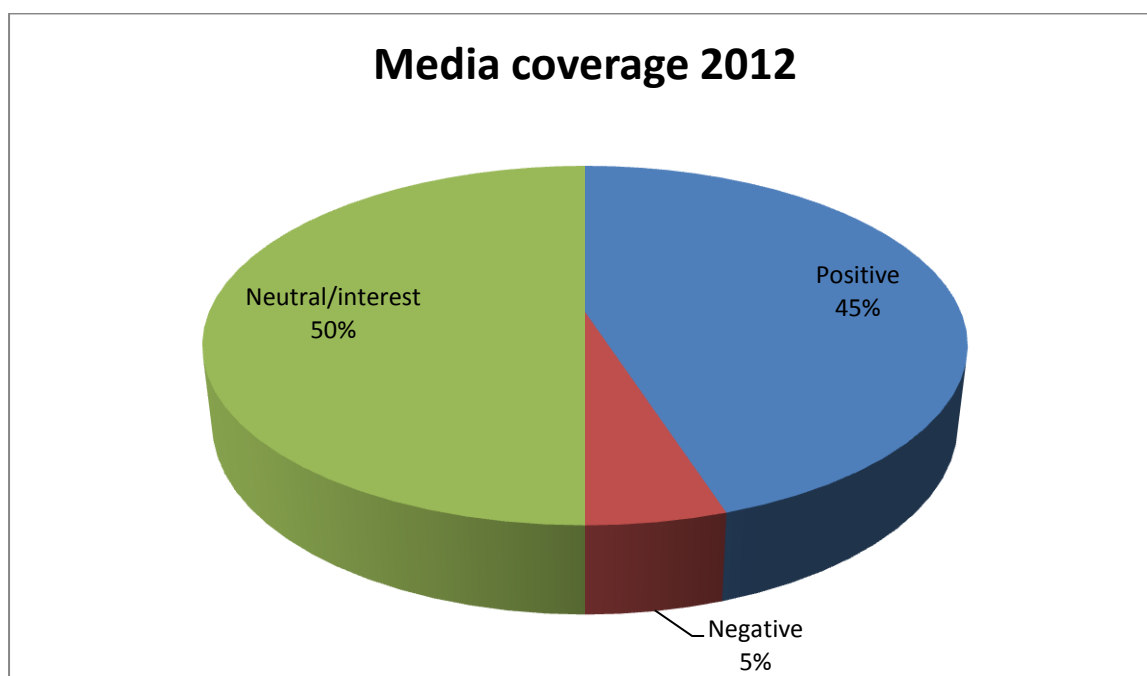
**Resident Survey Results** – telephone surveys carried out with 1801 residents across the UK has found that the Cairngorms is the most well known National Park in Scotland and was mentioned unprompted by 8% of respondents across the UK placing it in 7<sup>th</sup> place and slightly ahead of Loch Lomond and the Trossachs National Park. This is despite being the most remote National Park in the UK with relatively low visitor numbers. 90% of respondents also said National Parks are ‘very or fairly important’ to them.

**Visitor Survey Results** – the most recent visitor survey results carried out in 2011 by VisitScotland show 97% of visitors would definitely or probably recommend the Cairngorms National Park as a destination and 76% would definitely or probably come for a return visit demonstrating a strong sense of ‘closeness’ to the Park. During 2011 (the latest figures available) visitor numbers increased by about 1% over the previous year to 1.54 million. This is better than growth figures for most other rural areas across Scotland. Since 2003 there has been an increase of about 8%.

**Business Barometer Results** – The latest business barometer results are of Q3 2012. The contribution provided by key organisations playing a role in tourism across the CNP area was perceived in a more positive light this quarter compared to last quarter but was below that of a year ago. Services provided by Destination Management Organisations and the Cairngorms Business Partnership continued to be most positively recognised and the Cairngorms National Park Authority (CNPA) and VisitScotland were also rated above average. The contribution of local councils and, in particular, enterprise organisations were rated well below average. The National Park was generally considered to have a medium overall level of influence in attracting trade to the area and, as in previous quarters, was viewed as playing a more prominent role attracting new customers (rather than repeat ones) for the businesses in the area. The role of the Park was deemed to be relatively insignificant in terms of its impact on business profitability and, in particular, business operations.

**Digital Media Statistics** - The combined statistics of the number of 'total visitors' to the CNP and VisitCairngorms.com websites provides an indication of the level of awareness the Park has on a global scale while our social media activities provide an indication as to the level of closer interest people are taking in the Park. The CNP website has increased over the previous year by 18% and the total visitors to both websites is two-thirds of Loch Lomond and the Trossachs National Park's despite LLTTNP attracting over three times as many visitors on an annual basis. In addition, the Cairngorms National Park presence on social media is considerably stronger than LLTTNP with the number of 'followers' at 14,276 (CNP) compared to 5087 (LLTTNP).

**Media Coverage** - Google Alerts also shows that media interest in the Park is growing with more specialist programmes and articles focusing on the Park's special qualities. Overall by far the majority of coverage achieved is either positive or neutral.



- Regular coverage in local/Scottish media – Strathy, P+J, Piper, Herald, Scotsman, BBC Inverness/Highlands, BBC Landward and Out of Doors
- Features in national/international/specialist media include:
  - Scotland Outdoor Magazine – cycling in the Park
  - Trail magazine – Speyside Way Extension
  - Holyrood magazine (Rural Economy Supplement) – Decade of Delivering (joint NPs feature on importance of NPs and what they deliver for Scotland)
  - National Geographic (and subsequent national/international coverage) – Destination of a Lifetime
  - BBC – A Year in the Wild – three part series on UK's National Parks which featured Cairngorms