

CAIRNGORMS NATIONAL PARK VISITOR SURVEY 2003/2004 - RESEARCH BRIEF

INTRODUCTION

A number of public sector organisations within Scotland are involved in tourism at both the national and local level. Their remit varies geographically and by function, but each of them requires good market information in order to undertake their particular activities effectively. One important aspect of this is the need to understand the nature of tourism demand. Recognising this, it was recommended that a rolling programme of local visitor surveys be established throughout Scotland to provide consistent data relating to current demand.

BACKGROUND

The Loch Lomond and the Trossachs National Park was established in July 2002. The Cairngorms National Park was established on 25 March 2003. It is widely recognised that, with the development of National Parks in Scotland, many opportunities will arise for both the people who work and live within the areas and for visitors to the parks. To guide the sustainable management of the parks, it is clearly important that information regarding volumes of use, visitor profile and behaviour, the knowledge and attitudes of visitors and the impacts of information provided to visitors are available to the bodies responsible for the parks' management.

In the period prior to the designation of both the Loch Lomond and the Trossachs and the Cairngorms National Park, a significant amount of work has been undertaken to develop a visitor questionnaire, which would provide common baseline information for both Parks. The first phase of this work aimed to review previous visitor surveys in both Parks, and through a process of consultation identify the information requirements of the partner organisations. The study was carried out by NFO System Three, and also recommended a methodology, sample size and a draft questionnaire. The Executive Summary is appended to this brief. The second phase of this development work involved pilot testing the draft questionnaire and development of a self-completion questionnaire. It is intended that these questionnaires should be used in 2003 / 2004 survey with minimal adjustment and amendment. Copies of each are also appended.

A number of organisations, each of whom have complementary responsibilities within the overall tourism product, are keen to establish a baseline measure and extend their knowledge of the various types of visitors who come to each of the National Parks. Accordingly, they have identified the need to conduct a large-scale survey of visitors to both the Loch Lomond and the Trossachs National Park and the Cairngorms National Park during the forthcoming year. This will be the start of an ongoing survey programme which it is expected will be repeated every 3 years or so.

This group of organisations comprises:

- Cairngorms National Park Authority
- Aberdeen and Grampian Tourist Board
- Angus and Dundee Tourist Board
- Highlands of Scotland Tourist Board
- VisitScotland
- Scottish Enterprise Grampian
-
- Scottish Enterprise Tayside
-
- Moray, Badenoch and Strathspey Enterprise
-
- LEADER +

This brief sets out the requirements of the proposed 2003/2004 Cairngorms National Park Visitor Survey, and this follows the brief issued dealing specifically with the Loch Lomond and the Trossachs National Park.

LOCH LOMOND AND THE TROSSACHS AND CAIRNGORMS NATIONAL PARK SURVEYS

Due to the requirement that survey results are comparable between the two surveys it will be essential that the appointed consultants (in the event that both contracts are not awarded to the same supplier) have an open exchange of experiences and in particular of data. There will be an obligation to ensure that there is consistency in data analysis, in terms of cross tabulation and use of SPSS.

Consultants are asked to provide a method statement on how they would propose to deal with both surveys, whether it is the intention to tender for both surveys, or only the Cairngorms survey. In the event of the latter, the statement should include details as to how consistency in data collection and analysis would be achieved. If it is the intention to tender for both surveys, options for sub contracting could be considered. It is not clear at this stage when the earliest start date for the fieldwork for the Cairngorms National Park will be, however, it is anticipated that this will be no more than 1 month after the start date for the Loch Lomond and The Trossachs survey, which has been provisionally set for 7th April 2003.

There will be a requirement for an overall comparative report comparing the two surveys and highlighting what the results have in common, as well as differences in the two survey results. **Consultants are asked to provide a separate costing for the provision of such a comparative report.**

OBJECTIVES

The broad objectives of the study are to:

- • 1) supply information about visitors and their visit in order to guide future tourism policy and activity;
- 2) gather data, which can be updated in future studies to enable changes to be tracked over time;
- 3) furnish information. which can be used to assist in the production of

estimates of the volume and value of visitors to the overall National Park area, as well as key sub areas

METHOD

The area to be included in the study is that covered by the Cairngorms National Park. This covers a total of 1467 square miles from Badenoch and Strathspey in the north to the heads of the Angus Glens in the south, Laggan and Dalwhinnie in the west to Glen Tanar and Glenlivet in the east. A map indicating the overall area covered by the National Park is enclosed with this brief.

It is suggested that visitors be contacted at points where there are concentrations of tourists such as at visitor attractions, TICs and in town centres. However, in addition we would like to include surveys amongst those using more remote aspects of the Park. Although it is possible to use self-completion surveys in these areas, we would expect that a core level of face-to-face interviews be conducted at such sites. A list of suggested interview locations is attached. However, we would expect consultants to suggest additional or alternative sites where this is felt appropriate.

The total number of face-to-face interviews to be conducted is between 2,000 and 3,000. Costings should be supplied on the basis of 2,000, 2,500 and 3,000 face-to-face interviews. In addition, self-completion surveys will be required at more remote/ lower visitor rate sampling points. Self-completion surveys may also be used for supplementing the face-to-face surveys elsewhere. It is anticipated that a minimum of 1,000 self-completion surveys will be completed. Consultants are required to build in sufficient costs for such a level of return. Methods of distribution and protection from the elements should be detailed in the proposal. Consideration should also be given to distributing questionnaires to accommodation providers.

It is intended that the main bulk of the survey fieldwork be conducted throughout the summer season, between May and October inclusive. However, it is also required that sufficient numbers of interviews are conducted during the other months to provide a profile of visitors across the twelve month period of May 2003 to April 2004.

Public sector bodies in Scotland with an involvement in tourism who are, where possible, working towards extending the tourism season with a view to combating the negative effects of seasonality. It is desired that 'off-peak' information gathered be sufficiently robust at sub-area level to facilitate identification of variations in the profile, characteristics, activities, and opinions of visitors throughout the year.

Consultants are asked to include in their submission details of how they would propose to cover a full twelve-month period. This should include discussion relating to:

-
- geographical coverage at particular times i.e. whether geographical coverage should be partial, or across the whole area;
-
- the basis for selecting both interviewing points and the individuals to be surveyed at these points;
-
- numbers of interviews, which might be conducted within different sub-areas and whether any interviewing should be continuous or at 'spot' times;
-

- project costs.

All types of tourists, including day visitors, business tourists, those visiting friends and relatives as well as different types of conventional holiday tourists, should be included in the research. There will also be a requirement to include a quota of residents in the survey, and a specific questionnaire which includes only the questions relevant to residents has been developed. Consultants will be required to recommend a definition and quota for residents. It will be necessary for the consultant to address all these issues in the sampling strategy section of the methodology.

A copy of the face-to-face questionnaire used in a pilot exercise is enclosed providing an indication of the interview length and subject matter. It is expected that the questionnaire will be the same as the enclosed. However, we would welcome any suggestions aimed at enhancing the survey where appropriate.

It may be necessary to supplement these questionnaires with a few additional "hot topic" questions throughout the course of fieldwork. Consultants are asked to provide a separate cost for the inclusion of an additional two to three questions for both single month and two-month duration.

As regards the self-completion survey, a questionnaire including core elements in common with the main survey is appended. It is anticipated that copies of these surveys will be both distributed by the consultant and also left at main access points to walks and other remote recreational points. In addition, copies are expected to be placed on windscreens at key car parking facilities in the area. A mechanism for return of completed surveys and protection from the elements should be expressed in the survey methodology.

OUTPUTS

The full survey dataset is required in electronic form compatible with SPSS. In addition detailed written reports, both in hard copy and in electronic form on CD-ROM, are required.

In order that survey information is available sufficiently well ahead of the main 2004 season, to inform planning and management decision-making, an interim report should be available by end of November/ early December 2003.

At the end of the main 2003 season 'core' element of the study an overview of the key findings of the research should be presented at a location within the Cairngorms National Park, to be decided.

Written reports relating to the full year should also be produced for the Cairngorms National Park area. Draft full year reports should be available by mid June 2004, and once finalised a presentation will be required.

It is expected that the interim and final reports will be provided in a "user friendly" format, with graphical and geographical representation of the data. In addition, it will be necessary for the appointed consultant to provide a summary report with graphics and commentary that will be suitable for inclusion in a "glossy" leaflet for wider distribution by the park authority.

TIMING

Proposals to conduct this study should reach the specified study sponsors by noon on **11th April 2003** with a view to undertaking selection interviews and commissioning on **25th April 2003** at a location in the Park area.

It is anticipated that the twelve-month survey period will cover May 2003 through to April 2004. The following illustrates the anticipated schedule of events.

Set-up meeting w/c 28th April 2003

Fieldwork 7th May 2003 – 6th April 2004

Progress meetings July 2003

August 2003

Summer season report / presentation October / November 2003

Full year report / presentation end May 2004

BUDGET

Although no budget figure is supplied, consultants should note that a key criteria used for assessing proposals is that of value for money and that, providing the requirements of the brief are judged to be fully met, the least cost option will be selected.

SURVEY ADMINISTRATION

The study is being jointly funded by the Cairngorms National Park Authority, Aberdeen and Grampian Tourist Board, Angus and Dundee Tourist Board, Highlands of Scotland Tourist Board, VisitScotland, Scottish Enterprise Grampian, Scottish Enterprise Tayside, Moray, Badenoch and Strathspey Enterprise and LEADER +. It is likely that a Steering Group comprising of representatives of the key funders will be convened. On a day to day basis the project will be managed by the Cairngorms National Park Authority. All of the study sponsors will be involved at key decision-making points throughout the study. At the initial set-up meeting with the project Steering Group, key points of contact will be identified.

The appointed consultant will be required to provide invoices to the Cairngorms National Park to a timetable to be agreed between the consultant and the study sponsors. It is proposed this will be staged as follows, though this can be the subject of further negotiations with the appointed consultant:

-
- 20% on completion of the first month's fieldwork;
-
- 30% on completion of main season fieldwork (autumn 2003);
-
- 50% on completion of the project.

In addition to providing a personal presentation of the results, the successful consultant will be required to attend a set-up meeting in the Park area. Additionally, two progress meeting will be required during the course of the study. During the course of the interviewing, the company will be required to provide regular (monthly) progress reports.

PROPOSAL

The proposal should include details of:

- method to be employed (including statement on both surveys);
- a detailed timing plan;
- an indication of the role and experience of each person involved in the project
 -
 - past experience of relevance to this project;
 - • a detailed costing, showing fees and expenses separately. (Costs should be shown separately for the face-to-face sample sizes of 2,000, 2,500 and 3,000). Costs should be quoted inclusive of VAT. A separate costing for the comparative report is also required.

Six copies of the proposal should be sent to contacts 1-5 (one each) by 12 noon on the specified date. The copy sent to the National Park Authority should be clearly marked **"Tender documents"**:

• • 1) Miranda Whitcomb

Cairngorms National Park

14 The Square

Grantown-on-Spey

Morayshire

• • 6) Roger Edwards

Moray, Badenoch and Strathspey Enterprise

Forres Enterprise Park

The Apex

Forres

2) Paul Buchanan

• • Survey Research
Manager

VisitScotland

23 Ravelston Terrace

Edinburgh

EM 075

• • 7) Scott Armstrong

Highlands Of Scotland
Tourist Board

Peffer House

Strathpeffer

Ross-shire

3. Mary McBride

8) Lucia Campbell

• • Aberdeen and

Scottish Enterprise Grampian

- • 27 Albyn Place

Aberdeen

AB10 1DB

- • 4) Ian Reynolds

Scottish Enterprise Tayside

45 North Lindsay Street

Dundee

DD1 1HT

- • 5) Tracey Peedle

Principle Planning Officer

Loch Lomond and the
Trossachs National Park

The Old Station

Balloch

G83 8BF

Grampian Tourist Board

Exchange House

Suite 3

26/28 Exchange Suite

Aberdeen

AB11 6PH

9) Colin Smith

- • Angus and Dundee
Tourist Board

7-21 Castle Street

Dundee

DD1 3AA

10) Patricia Hamilton

- • Cairngorms National
Park

14 The Square

Grantown-on-Spey

Morayshire

PH26 3HG

Any questions relating to this brief should be directed in the first instance to Miranda Whitcomb at the Cairngorms National Park.

Tel: 01479 873535

Email: miranda@cairngorms.prestel.co.uk

Appendix 1 – Suggested Interview Locations

LOCATION TARGET AUDIENCE

Aviemore town centre residents tourists

Ballater town centre residents tourists coach

Balmoral car park day trip tourists coach
Balmoral Distillery car park tourists coach
Braemar town centre residents tourists coach
Cairngorm car park day trip tourists coach walker skier
Carrbridge Landmark Centre day trip tourists
Dinnet Burn o'Vat car park day trip tourists walker cyclist
Glen Esk car park day trip tourists walker
Glen Doll car park day trip tourists walker
Glenlivet Glenlivet Distillery car park tourists coach
Glenmore road end tourists walker
Glen Muick car park day trip tourists walker
Glenshee car park day trip tourists walker skier
Glen Tanar car park day trip tourists walker cyclist
Grantown-on-Spey town centre residents tourists
Kincaig Highland Wildlife Park day trip tourists
Kingussie town centre residents tourists
Laggan village centre residents tourists
Lecht car park day trip tourists skier
Loch Garten Osprey Centre car park day trip tourists
Linn of Dee car park day trip tourists walker
Newtonmore Highland Folk Museum day trip tourists
Ralia car park tourists coach
Rothiemurchus car park day trip tourists coach walker cyclist
Skye of Curr Speyside Heather Centre day trip tourists
Tomintoul town centre residents tourists coach