



For information

Title: Sustainable Tourism Action Plan – Annual Update

Prepared by: Heather Trench, Sustainable Tourism Officer
Murray Ferguson, Director of Planning & Place

Purpose

To update the Board on delivery of the Sustainable Tourism Action Plan 2022-27 and give wider context on associated policy developments.

Recommendations

The Board is asked to:

- a) Note progress in delivery of the Sustainable Tourism Action Plan 2022-27.

Strategic context

1. In 2022 the Board approved the 5-year Sustainable Tourism Action Plan (STAP), one of a series of action plans that build on the work within the Cairngorms National Park Partnership Plan (NPPP4). The actions within the STAP set out the contribution of the wider tourism industry to the delivery of particularly relevant NPPP4 objectives, as well contributing to Scotland Outlook 2030, the national tourism strategy. It sits alongside other related action plans, including the Strategic Tourism Infrastructure Plan, the Active Cairngorms Action Plan and the emerging Wellbeing Economy Action Plan. Oversight of the STAP lies with the Cairngorms Tourism Partnership which is chaired by CNPA Board member, Xander McDade. Delivery of the actions within the plan are carried out by a range of partners, who have all contributed to the compilation of this first annual review of progress as detailed in Annex 1.
2. The Cairngorms National Park has been accredited with the European Charter for Sustainable Tourism in Protected Areas (the Charter) since 2005, shortly after designation as a National Park. The accreditation is awarded on the basis of a 5-year strategy and action plan for sustainable tourism. NPPP4 acts as the overarching Sustainable Tourism Strategy for the Park and was submitted alongside the STAP in December 2022 as part of the re-application for the Charter. After an



on-site verification visit in May 2023, the Charter was officially re-awarded in November 2023. The Charter, and all the connections we make through the Europarc Network, significantly contributes to the reputation of the Cairngorms National Park in Europe.

National Tourism Policy

3. While delivery of the STAP is carried out at a local and regional level, it is shaped by the wider tourism policy environment, and there are several developments that are worthy of note.
 - a) Short-term let licensing: This scheme has now been implemented across Scotland, and the Short-term let control area, established in Badenoch and Strathspey by Highland Council, came into force on 4 March 2024. The implementation of both systems has been discussed extensively at the Park Authority Planning Committee. The Schemes are being monitored by local authorities and the Park Authority planning team will be collating data for the National Park. This will be reported back via the Cairngorms Tourism Partnership in due course to ensure that we maintain an appropriate range of accommodation for visitors.
 - b) Transient Visitor Levy: The Visitor Levy (Scotland) Bill was introduced to the Scottish Parliament in May 2023 and the general principles agreed at Stage 1 in February 2024 – the legislation is programmed to be finally approved by June 2024. If passed, the legislation will give all local authorities the powers to introduce a scheme to add a levy for overnight accommodation if they wish to do so. This will be based on a percentage of the cost, with the rate set by individual local authorities. An expert advisory group, led by VisitScotland, is developing national guidance and best practice. The levy will provide an extremely important new source of funds to help manage tourism sustainably within the National Park. CNPA facilitated a round-table meeting with Ministers and stakeholders; and staff have met with VisitScotland and the Bill Team to make representations regarding the need to ensure a joined-up approach to both collection and the use of the funds in relation to National Parks.
 - c) Tourism Funding: Across Scotland it is evident that there are significant pressures on budgets that relate to sustainable tourism activity. Several private sector destination organisations have closed or are reducing their staff and



operations. Meanwhile the Rural Tourism Infrastructure Fund, administered by VisitScotland is coming to a close. The Better Places Fund, administered by NatureScot, and which funded seasonal rangers and related activity will not be available in the immediate future. Within the Cairngorms National Park the combined effect of these changes will be minimised by our direct funding from Scottish Government and our successful efforts to draw in partnership funding.

- d) **Changes to Quality: Assurance scheme:** In February 2024 VisitScotland announced changes to the national approach to quality assurance over the next year and part of changing model of operations. VisitScotland are moving to a digital-first approach which will offer free-to-access programme of business advice that will provide insight and support to inspire quality in the tourism industry. The scheme will come to an end on 31 March 2025 and in the Park this will mean changes for around 135 businesses.

Key areas of activity

- 4. A summary of progress against the full range of actions is included in Annex 1, but there are a few key areas of activity to note.
 - a) **Pre-arrival visitor information:** With funding from the Cairngorms Capercaillie Project, the Cairngorms Business Partnership developed the 'Love Nature, Love Cairngorms National Park' project to encourage businesses to share engaging messages about responsible behaviour with their audiences, particularly in advance of visiting. A range of new assets and videos have been deployed, all utilising the National Park brand guidelines.
 - b) **Tourism assets:** A range of previous partnership projects have developed an array of tourism assets and products, including Badenoch - The Storylands, the SnowRoads Scenic Route and the Tomintoul & Glenlivet Dark Sky Park. These initiatives were designed to draw visitors to the quieter areas of the National Park. Work is continuing, in partnership with the Cairngorms Business Partnership, to promote and manage the legacy of these projects through business engagement, training, and marketing.
 - c) **Reducing seasonality:** In 2021 we commissioned market research to support a winter marketing campaign. This has underpinned an ongoing campaign called '*Where Winter Comes to Life*' which was launched in winter 2022/3 and



developed further in 2023/24. As well as promotion through targeted digital advertising, PR coverage and audio Spotify advertising, there has been a focus on business engagement with the campaign, and development of products, packages and events to drive winter visits.

- d) **Community-led Tourism:** There is increasing interest in community-led tourism in Park promoted, in part, by the formation of SCOTO - the Scottish Community Tourism Network. SCOTO held their first national conference in Kingussie last year and staff and members attended their recent conference in Dumfries. There are many good examples of community-led tourism projects within the National Park and potential for this area of activity to grow further in future years.

Research and Monitoring

5. We continue to commission research to allow us to monitor key tourism trends.

- a) **Visitor Volume & Value:** Visitor numbers and the value of tourism to the local economy is measured through STEAM, a supply-side economic model. The most recent data we have is for 2022, at which time there were an estimated 1.73 million visits to the Cairngorms, with an economic impact of £353 million. While visitor numbers were down around 16% compared with a pre-Covid baseline in 2019, economic impact was up by 2%.
- b) **Business Barometer:** The Cairngorms Business Partnership continue to manage a quarterly survey of businesses, including business levels, barriers to growth and business confidence. The most recent data for Quarter 4 2023 shows an increase in short, medium and long-term business confidence. While the most significant barriers to growth continue to be bureaucracy/legislation, supplier costs and staff levels/ availability, each of these are less significant challenges on average than recorded in previous recent quarters. The full quarterly report is available [here](#).
- c) **Visitor and Resident Research:** Since National Park designation in 2003, we have commissioned a 5-yearly visitor survey to capture key data on visitor demographics, motivation, activities and satisfaction levels. This allows monitoring of NPPP4 indicators, and allows businesses and partners to make informed decisions about investment and marketing. We have now appointed consultants to carry out the next wave of research. While the methodology will remain similar, with face-to-face interviews carried out at around 35 interview



sites across a full calendar year, this time we plan to carry out two separate waves of research within the 5-year contract to give us more regular information. The first wave will run from May 2024 to April 2025 and the second wave from November 2026 to October 2027. Additionally for the first time we have tendered alongside the visitor research, a separate but related survey for those that live and/or work within the National Park. This will take place biennially as an online survey, with the first wave due to take place in late summer 2024.

Next Steps

6. The next annual update on STAP delivery will be produced in March 2025. A wider mid-term review of the Action Plan will take place in late 2025 or early 2026. As well as assessing delivery, this will be an opportunity to make some amendments to the plan where necessary in response to the changing tourism landscape.