

Cairngorms National Park Visitor Guide - Future Options Analysis

1 Background

The Cairngorms Visitor Guide has been produced with a current print run of 130,000 copies from 2004 – 2006 in a 2100mm x 1950mm format, featuring general information on the area's attractions, culture, arts & crafts and listing natural attractions, visitor attractions and eating establishments. As the guide has been distributed largely at destination, accommodation has not been included, although VisitScotland QA accommodation establishments who offer a service to non-residents are able to advertise in the guide. Production of the guide has been led by a steering group consisting of representatives from the each of the VisitScotland Network Offices (formerly ATBs) and the Cairngorms National Park Authority.

Line entries in the guide are provided for non-accommodation tourism businesses in the Park area who purchase a Business Opportunity Package (BOP) from their respective VisitScotland Network office. In the case of businesses in Badenoch and Strathspey this is the ONLY line entry in a VisitScotland publication as part to this package. For other tourism businesses in the rest of the area this line entry is provided as an ADDITIONAL benefit of taking out a BOP.

Line entries are also provided in the guide for a large number of non-commercial natural attractions such as Nature Reserves, Forest Parks and Places of Interest.

The initial aims of the guide were:

- To inform visitors of places to visit, things to do and activities to undertake
- To persuade visitors to increase their length of stay and spend in the area
- To enhance visitors' enjoyment of their stay
- To encourage retention and dispersal of visitors
- To encourage repeat business

The publication has a quality look and feel to adequately represent the undoubted quality of the area. It was always intended to be more than a leaflet - more of a booklet - which visitors could refer to and retain as a souvenir of their visit.

2 Other CNP Publications

The Visitor Guide is one of a range of visitor information publications about the Cairngorms National Park. Other publications for 2005 / 2006 are detailed below:

| Publication | Description | Produced by |
|---------------------------------------|--|--|
| Cairngorms Explorer | Public transport timetables and associated information. Annual. | CNPA |
| CNP introductory leaflet | General CNP information, including map | CNPA |
| Cairngorms Countryside Events Leaflet | List of events arranged by ranger services within the CNP. Annual. | CNPA |
| Place Names of the Cairngorms | Brief introduction to translation and pronunciation of place names in the CNP. | CNPA |
| Hilltracks in the Cairngorms | Guide to long-distance rights of way within the CNP | Scotways |
| Park i | Comprehensive events and information guide to the CNP. 6-monthly. | Ice publishing (commercially produced) |

There is some overlap in content between the publications, notably with Park i, which is commercially produced and includes details of events and public transport timetables as well as general information about the area, partly supplied by the CNPA.

3 Options Analysis

The options for future development of the guide are detailed below as a starting point for discussion.

i. Continue to produce as current

The Visitor Guide has generally been well-received by visitors and businesses. The current format allows for thorough visitor information on details that more commercial guides may omit, such as natural attractions, cultural heritage and the Scottish Outdoor Access Code.

However, the current format does require public subsidy, in the region of £12k in 2005, and likely to be more in 2006 due to decreased advertising income.

ii. Cease production of a Cairngorms Visitor Guide

The Grampian and Angus areas of the Park are already covered by the Visitor Guides produced by the VisitScotland network offices in Aberdeen & Dundee. Previously the Commercial sector produced a Badenoch & Strathspey Visitor Guide for VisitScotland and it would be possible to revert to this situation.

Individual guides could carry information about the Park, however, there would then be no Visitor Guide covering the Park as a whole.

iii. Integration with other publications

As mentioned previously, there is some overlap with other CNPA publications, and consideration could be given to encompassing the information from the visitor guide within these.

Most of the other publications each focus on one particular element of visitor information, while the visitor guide currently provides a more general overview. If more in-depth information is included in the other leaflets, and perhaps the range of other publications expanded to include, for example, more detailed information on the natural heritage, the Visitor Guide could include only very general information and signpost visitors to other publications.

The introductory leaflet also provides general information, but is far more concise and has a wider distribution.

There is also overlap with the commercially-produced *Park i* guide. This will be considered under Option 6.

iv. Change to accommodation guide

At the moment there is no VisitScotland or CNPA park-wide accommodation guide. Changing the visitor guide to include accommodation may make the publication self-financing, however a significant cost would be the associated marketing to ensure potential visitors in advance of their trip were requesting it. While production costs may be met through increased advertising revenue from the accommodation sector an even larger subsidy may be required to allow a marketing campaign to take place with the guide being used as the fulfilment piece. There would be overlap or displacement with existing VS accommodation guides. Also, distribution would have to be more widespread, and the original objectives of the project would have to be re-considered. Feedback from businesses in 2004 shows that only 40% would be in favour of including accommodation listings within the guide..

v. Remain as visitor guide but allow accommodation advertising

Extending the right to advertise in the guide to accommodation businesses could increase revenue, but if distribution remains largely at destination, advertising may be of limited interest to businesses.

vi. Put out to tender for commercial production

The guide could potentially be put out to tender for commercial production.

A commercial guide, *Park i*, was recently launched by Ice Publishing, with the first edition in summer 2005 including events listings and tourist information as well as more general information on local services etc. It is intended to be produced twice a year. Print run and distribution are unclear. Much of the content duplicates information in the visitor guide and/or CNPA publications and the publisher has approached the CNPA with a view to merging the visitor guide with *Park i*.

Although *Park i* has very comprehensive listings of businesses operating in the Park the take up of advertising is heavily weighted towards Badenoch & Strathspey. The Guide also has very limited copy and imagery.

If, in the future, the visitor guide was produced on a commercial basis, the work would have to be put out to tender. Grant-aiding the publication may also be necessary to ensure that all the original objectives of the project continue to be met.

4 Other Considerations

The current cost of production for the 2006 Guide is approximately £30,000 which include print, paper, design, photography, cartography and delivery but not distribution. The distribution costs are met by VisitScotland utilising the network of Tourist Information Centres and other information outlets within the Park and in the surrounding areas. A limited amount of distribution is also carried out by distribution companies such as PPD, Great and Landmark.

In 2005 the guide generated advertising income of £18,975 but sales to date for the 2006 edition only amount to £8,275. Although there are a number of circumstances which may have led to this disappointing response, it is clear that producing a publication with such a low level of industry support and the requirements for such a large public subsidy is not sustainable. This is particularly acute for VisitScotland network offices where there is generally a policy of cost neutrality on publications and other priorities arising out of Partnership Agreements with Local Authorities.

A particular issue for VisitScotland Highland will be the provision of an appropriate line entry within the Business Opportunity Package for tourism businesses in Badenoch and Strathspey. This will need to be accounted for in any approach for commercial production of the Guide.

5 Timescale

Marketing Opportunities through VisitScotland are currently being developed for 2007 and information about entries in main guides will be provided to tourism businesses in March/April 2006. Although it is not critical that information about a 2007 Cairngorms National Park Visitor Guide is included in these communications at that time, it would be sensible to highlight to tourism businesses in the Park area whether one will be produced **and included as part of the benefits package**. This would be in line with VisitScotland policy to streamline and integrate the range of business opportunities available.

Alternatively the 2007 Guide becomes a "stand alone" publication and issues of benefit and integration do not apply. In this situation a decision on the best way forward is less time critical.

For consideration at a meeting of the CNPA ViSIT Forum to be held on Thursday 26 January 2006