

CAIRNGORMS NATIONAL PARK AUTHORITY

FOR INFORMATION

Title: OCTOBER 2012 CONTEXT SETTING

Prepared by: Management Team

Purpose

To provide some background information against which to assess our progress with delivery of the Corporate Plan (Paper 2) and National Park Partnership Plan (paper 3).

Recommendations

Take note.

Executive Summary

Arrangements for collecting data for long term National Park indicators are in place, but movements in the indicators will only be apparent on relatively long time intervals. So what is presented in this paper is a mix of background information, highly dependent on the data that is available in the short term. It is not a robust analysis. It is therefore to be treated accordingly, but may be helpful in discussion about the challenges of delivering the NPPP and the Corporate Plan.

OCTOBER 2012 CONTEXT SETTING – FOR INFORMATION

Introduction

1. This paper provides background information to help the assessment in papers 2 and 3 of delivery of the Corporate Plan and National Park Partnership Plan (NPPP). It is presented under four headings: each of the three strategic objectives in the NPPP, plus a fourth on organisational effectiveness and reputation. A mix of data and information is provided on each to help measure long term and medium term trends, alongside qualitative and anecdotal information. The paper is structured around these four objectives and information is provided on each as per the table below.

Strategic Objectives and Information Provided		
No.	Strategic Objective	Information Provided
<i>National Park Plan Objectives</i>		
1.	A sustainable economy supporting thriving businesses and communities	<ul style="list-style-type: none"> • Long Term Monitoring* <ol style="list-style-type: none"> 1. Park indicators 2. Facts & figures 3. Other data • Recent observations
2.	A special place for people and nature with natural and cultural heritage enhanced	
3.	People Enjoying the Park through outstanding visitor and learning experiences	
<i>Corporate Objective</i>		
4.	Organisational effectiveness, efficiency and reputation	<ul style="list-style-type: none"> • Recent observations

*Long Term Monitoring – refers to framework in Board paper 6 (21 Jan 2011)

Overview

2. For long term National Park indicators, it is too early to see movement – in some cases change will only be apparent annually, and in other cases longer than that, dependent on timescales for repeating surveys.
3. It is not easy to find consistent picture from other evidence available. We are clear we can collect data needed for the long term monitoring mentioned above, but in the shorter term, it can be difficult to make sense of a variety of data, often collected by different bodies in different ways. In addition, some issues are inherently more amenable to regular measurement than others. So assessing the context in which we are delivering for the CNP is a mix of information and intuition – a mix of data and

anecdote. This paper does not in itself provide a comprehensive, robust or structured assessment - it merely provides some background information for the assessment of the reports on delivery of our Plans.

4. The issues which stand out (in some cases simply because the information is available) are:
 - a) Economy suffering and business confidence low. National Park should be an opportunity, and evidence from visitor survey that this is so, but evidence of this being reflected in turnover is patchy. Tourism clearly an essential element of the local economy – intuitively obvious from this that we continue to put effort into marketing the area as a tourism destination (through CBP) and develop the Cairngorms Brand (which already has considerable exposure)
 - b) Bad weather had adversely affected a whole range of businesses – our approach needs to be sensitive to this.
 - c) Evidence that community engagement and development in CNP is good – something that should be seen and used as an asset for the Park (not just by CNPA).
 - d) Access opportunities outstanding, and some indication that usage of paths increasing. Cycling likely to become a growing opportunity as additional SG monies being made available.
 - e) Awareness of Cairngorms National Park, and importance of National Parks to Scotland, at encouraging levels– will always be more to do, but progress good in only 10 years. A good platform for developing Cairngorms Brand use.
 - f) Attitudes to CNPA will always vary - despite some negative coverage locally on planning, there is also some encouraging feedback.

Objective I - A sustainable economy supporting thriving businesses and communities

Objective I - Long Term Monitoring	
I.1 Park indicators (<i>Jan 2011 Board paper</i>)	
Indicator	Comment
Population profile	Number of young people and children. (trends to come from regular ONS figures).
Rural deprivation – a measure of access to services.	On most measures, levels of deprivation low, except for geographical access. More than half the Park is in the 10% worst areas of Scotland <i>for access to services</i> ; but 15 out of 22 data zones in the Park improved 2006 to 2009.
Economic Value of the CNP (Gross Value Added).	Grown since 2003, and estimated at £400m in 2006, or 0.43% of Scotland's GVA. <ul style="list-style-type: none"> • Farming and forestry £50m • Tourism £115m • Public sector (admin, health, education) £60m
Community Activity. Number of communities which undertake local community action planning.	In 2010, all communities.
Land area funded under SRDP for public benefits	<i>Data not available</i>
Amount of electricity generated from renewable sources	<i>Data not yet available.</i>
Reduction in carbon emissions.	<i>Data not yet available.</i>
I.2 Facts & figures (<i>Jan 11 Board paper</i>)	
11% of the wealth created in the CNP is from agriculture and forestry.	
CNP an important source of fresh water for large part of Scotland: Dee, the Don, the Spey; also feed the Esks and Isla, and the Garry that enters the Tay.	
40% of Park is moorland, mostly managed for grouse shooting	
20% of the Park is woodland- half managed for timber production, half managed to maintain habitats for threatened species. Many areas managed for recreation in addition.	

Objective 1 - Long Term Monitoring

2010 study (Economic & Social Health of CNP) showed growth in population due to net annual in-migration of 200. CNP bucks the national trend in rural areas, in which young people leave and do not return; in CNP indications of net increase in young adults coming to live.

Average incomes in CNP about 75% of national average.

Levels of unemployment have risen since start of 2008 along with recession, to around 2% of working age population. Since NP established in 2003, unemployment levels have been around half Scottish average. Number of jobs has increased by about 1000 since 2003.

Park's economy more heavily based on tourism than any other part of Scotland. It accounts for nearly a third of economic output in the Park.

2006-2010 nearly 200 affordable homes were built in Badenoch & Strathspey.

1.3 Other Data

Objective 1 - Recent observations

CBP Business Barometer - Q2 2012

- The poor summer has had an impact on business growth this quarter – ‘the weather’ is identified as the key barrier to growth followed by ‘supplier costs’ and then ‘bureaucracy’. Previously ‘bureaucracy’ came out higher, followed by ‘supplier costs’ and then ‘the weather’. Availability of staff has decreased as barrier.
- Half of businesses noted less customers and turnover although the proportion of overseas visitors has increased (mirrors national trend).
- Business confidence is at its lowest since the barometer started. With rising costs businesses are reducing their level of investment.
- Perceived influence of the Cairngorms National Park in attracting first time visitors and impact on business/improving profit, was generally down.

Tourism

- **Estimates from STEAM survey 2004-2010** in Cairngorms NP:
 - Visitor numbers increased steadily by 5% over 2004 to 2010.
 - Revenue increased by 12% and although positive does not keep pace with inflation.
 - Number of jobs supported (5,105 in 2010) fluctuates but show modest increase.
- **Scotland 2011 STEAM Summary**
 - Poor year for South Scotland and particularly poor in South West with economic value of tourism down between 1 and 4%. Central belt, east of Glasgow, and east coast including Edinburgh, Perth, Dundee and Aberdeenshire did best with economic value up 3% in some areas.

Objective 1 - Recent observations

- CNP visitors increased by 1% and economic value 2% which is on a par with the rest of Highland Region. Within CNP the figures are not even. Badenoch and Strathspey (80% of tourism economy) shows an increase in economic value by 4% with the rest of National Park showing a decline by 4%. There was a dramatic decline in non-serviced accommodation in rest of CNP in 2011.
 - The long term picture is that the National Park continues to attract more visitors but they are spending less.
 - Nine month figures for 2012 will be available in December but the ‘feeling is’ that 2012 has been a very challenging year for tourism businesses particularly May – July.
- **Tourism Intelligence:** reports in April 2012 that number of overnight visits to Scotland rose by 9% in 2011, with 14% increase in expenditure. Seems at odds with STEAM survey results.
 - **New Tourism Strategy** for Scotland published recently by Scottish Tourism Alliance “Tourism Scotland 2020”. Key messages are: nature a key asset; providing authentic experiences essential; need for collaboration. Cairngorms Business Partnership mentioned as exemplar of the industry working together.

Communities

Through the community development officer network (since 2008) feedback indicates:

- 200 community groups have been supported with funding applications, advice and information on governance and finance.
- Over two million pounds has been drawn down in funding to the Park including funding from Lottery, trusts, and business (Co-op, B&Q, local estates etc.)
- Higher levels of community cohesion have been achieved through the Community Action Planning process (better working together and less duplication of effort)
- Levels of participation in public events based around National Park issues has increased dramatically since 2006 (first consultation on the Park Plan) with numbers regularly up by 100%.
- CNPA cited as a catalyst for best practice in Community Engagement in both Aberdeenshire (Aboyne) and Highland (Grantown on Spey) by HMIE reports (2011)
- Sept 2012 Scottish Government consultation on Community Engagement and Empowerment Bill. Signals SG wish to see better use of Community Planning.(CNPA responded, offering visits to SGov to demonstrate good practice).

Economic Indicators for Scotland

- Total economic output decreased by 0.1% during Q1 2012 (0.4% decrease in UK over same period). Big fall in output in construction sector.
- Unemployment rate increased to 8.2% in period May-June
- Scotland’s population grew by 4% 2002 to 2011.

Objective 1 - Recent observations

- Economic growth forecast for Scotland for 2012 +0.4%, and for 2013 +1.3%.

Land Management

- Farmers and crofters are highly dependent upon Pillar 1, Single Farm Payments in order to make ends meet. The current review of the Common Agricultural Policy creates a lot of uncertainty about the future of farming and forestry beyond 2014. CNPA and NFUS have recently been actively engaged with Scottish Government in trying to influence proposed 'Greening measures' which could have significantly negative impacts on biodiversity and farming practice in the National Park.
- Influencing the EU is critical to ensuring that the next round of the Scottish Rural Development programme meets the needs of land managers in the National Park in delivering the National Park Partnership Plan. However CNPA needs to be realistic about how much we are able to influence at a local level.
- The poor summer has affected feed prices, which are currently very high due to low yields. This is adding the strain to farmers and crofters across the Park.

Sporting

- The wet summer has also had a significant impact on salmon fishing with fish migrating up river early with potentially detrimental effects on spawning. The poor summer weather has also reduced productivity on many grouse moors where shoots have had to be cancelled.

Estates Survey

- A survey of estates due to take place in 2013 will identify a whole range of areas in which land owners and managers and tenants contribute to the local economy and the conservation of habitats and species.

Objective 2 - A special place for people and nature with natural and cultural heritage enhanced

Objective 2 - Long Term Monitoring	
2.1 Park indicators (<i>Jan 2011 Board paper</i>)	
Indicator	Comment
Condition of features of designated conservation sites	78%, (same as 2005) Note: National figure 77%.
Maintain sense of wildness.	No data yet, but mechanisms in place to measure objectively
Condition of listed buildings in Park.	3 in 2012
N/o community projects celebrating local history/traditions in Park	25 community projects 2010
Land area managed for public benefit under SRDP contracts	Data not yet available
2.2 Facts & figures (<i>Jan 11 Board paper</i>)	
50% of CNP designated for nature conservation (up from 39%)	
Park home to 25% of UK rare/threatened species	
Most important area in UK for capercaillie	
40% of Park is moorland, mostly managed for grouse shooting	
20% of the Park is woodland- half is managed for timber production, half managed to maintain habitats for threatened species. Many areas managed for recreation in addition.	
2.3 Other Data	

Objective 2 - Recent observations

Scottish Biodiversity Report (Sept 2011)

- Reports on Scotland's contribution to 2008 UK BAP assessment. Of 39 priority habitats in Scotland, 43% were stable or increasing – 33% declining and remainder unknown. Of the 197 priority species in Scotland, 38% were stable or increasing - 22% declining and remainder unknown.

SNH Nature Omnibus Survey 2011-12

- Wildlife the public associate with Scotland - for 73% it is deer; golden eagle, grouse, red

Objective 2 - Recent observations

squirrel and salmon ranked highly. Fewer than half expressed concern about at least some Scottish wildlife species; least concern among the young and ethnic minorities. Greatest concern in the AB socio-economic grouping. The red squirrel is the species that people most concerned about – second was deer (which presents a PR challenge in the Cairngorms where deer are culled).

- The majority of Scotland's population stated they care for nature – but they do not believe they are well informed about change in their local landscape and only a minority believe they have the opportunity to have a say in proposed changes.

Deer Management

- Public interest in deer remains high. A wide range of organisations including SNH, CNPA the Country Sports Tourism Group and the Association of Deer Management Groups have been helping to explain to schools and the public about the need for deer culls to manage habitat, provide healthy food and support the local economy.
- With the introduction of the Wildlife and Natural Environment Act Scotland 2011, there is an increasing onus on deer managers to demonstrate a responsible approach to deer management planning and to high standards of deer stalking/culling in the interests of public safety and deer welfare.
- Recent advances in mapping deer managers objectives pioneered through in the National Park have been well received by Deer management groups across Scotland. The Cairngorms Deer Management group (CDAG) brings together several deer management groups and other interests to combine their knowledge and experience in furthering sustainable deer management. They will be focussing on deer fencing issues and Road Traffic accidents in the near future.

Land Management communications

- The Land Management Forum, Farmers Forum, CDAG and Monitor Farm all meet regularly and greatly assist land managers to pick up on policy changes, new ideas and learn from each other. This range of bodies is a great asset for the National Park land managers.

Cairngorms Nature

- Local Biodiversity Action Plan (LBAP) groups across the country, in light of the economic climate, are facing great challenges in keeping active. The National Park is now host to the new partnership Cairngorms Nature which will be officially launched in Spring 2013.

Capercaillie and Black Grouse

- The wet spring and summer is thought to be the main factor contributing to poor productivity this year. Lek counts were on average, but brood counts were generally poor. Conversely Black grouse seem to have done reasonably well this year.

Objective 2 - Recent observations**Wildfire**

- Particularly in spring, this remains a very significant threat to many habitats, especially woodland. Wildfire groups across the National Park continue to be supported by CNPA and training courses delivered in November.

Wildcat – National Action Group

- Following on from the Cairngorms Wildcat Project a National Action Group has been created in which the National Park and CNPA will continue to play a key role.

Woodland Expansion

- There are significant government woodland expansion targets across Scotland amounting to 10,000 ha per year. There are many small areas of expansion in the National Park, and some very significant larger areas are also being added on Park estates (e.g. Glen Feshie, Abernethy, Glenmore, Mar Lodge, Candacraig, Rothiemurchus, Inverloch, Invercauld and Atholl) all of which are in varying stages of progress.

Disease threat

- There has been significant coverage in the media of *Dothistroma* (Red band needle blight) which slowly kills Lodgepole, Corsican and Scots Pine. It has spread quite dramatically northwards across the UK over the last ten years. It is present in the National Park. Foresters are being advised on vigilance and management through training seminars etc.

Wildlife Crime

- Despite the best efforts of a range of organisations and the police this continues to be a major issue, but there has been a decline across Scotland in reportings of raptor persecution. Changes in the Police Forces across Scotland means we now have just one Assistant Chief Constable covering the National Park. There is perhaps more scope now than ever before for a Park wide Wildlife Crime Officer.

Objective 3 - People Enjoying the Park through outstanding visitor and learning experiences

Objective 3 - Long Term Monitoring	
3.1 Park indicators (<i>Jan 2011 Board paper</i>)	
Indicator	Comment
Number of people who identify the special qualities of the CNP in the visitor survey.	More said in 2010 than in 2006 they visited because the area was a National Park; fewer in 2010 survey said the special qualities were what they liked most about the Park. Possible that people now associate the Park with the SQs and opportunity to enjoy them.
National awareness of the CNP brand	Date not yet available.
Visitor number to the Park – using Moffat Centre visitor attraction monitor based on 10 attractions.	Rise of 2% between 2006 and 2009.
Condition of core paths – based on “fit for purpose” criterion.	In 2010 rose from 39% to 43%. Target of 70% set for 2012.
3.2 Facts & figures (<i>Jan 11 Board paper</i>)	
Approximately 1.4 million visitors to Cairngorms National Park each year (Compare: 4m to LL&TT; 22m to Lake District; 2m to Northumberland; 1m to Exmoor)	
CNP contains 55 munros; some of Scotland’s most popular and most accessible winter climbing venues.	
3 of Scotland’s 5 ski resorts; one of Scotland’s main mountain biking centres at Laggan Wolftrax.	
Network of 932 km (579 miles) of core paths as well as many other paths and tracks that are promoted. The river Spey is currently Scotland’s only river identified as a core path (for canoeists and kayakers).	
3.3 Other Data	
People counter data	
<ul style="list-style-type: none"> In one community where there has been a counter operating for 9 years. Annual averages vary between 28,000 and 40,000 until 2011 when the annual figure increased to 53,000. The only change that happened during this year was the comprehensive signing of a path network and an updated path leaflet published. The Old Logging Way is providing an off-road route for around 55,000 users. Two thirds of users are on bikes and would otherwise have been on the road or not cycling in the area. Indications for 2012 show a likely 4% increase in annual use. 	

Objective 3 - Recent observations

VisitScotland most recent visitor survey for CNP was published in 2011

- Top reason for choosing NP includes scenery and landscape (45%) – but this no higher than average for Scotland.
- Most popular activities were walking (42%), sightseeing (39%); most enjoyed aspects reflected this too.
- Over half visitors shared their experiences online after returning home.
- Vast majority would recommend CNP as a destination.
- Half of visitors are touring Scotland

Access/Walking

- SNH report on core paths shows Cairngorm NP has 879km in core path network, and highest length per head of population in the area (51m), closely followed by LL&TT at 50m. Scottish average 1.8m. Reflects low density of population and management of NPs to create high quality walking opportunities.

Recreation

- May 2012 Scottish recreation survey shows 46% adults make one or more visit to outdoors per week (unchanged since 2009). Does this reinforce potential for National parks to provide health and recreational benefits? (no figures specifically for NPs)

Investment in Visitor Facilities

- In CNP public sector has invested £1.25million in 12 out of the VICs and Ranger bases over the last 10 years.

SNH Nature Omnibus Survey 2011-12

- Reports that majority of people get outside and enjoy the outdoors (only 9% said rarely or never). Report acknowledges this a different result from Scottish recreation Survey (see above); the questions were asked in different ways. Emphasises need for consistent approach. Half of people interviewed said they used outdoors for general leisure – dog walking, picnics, short walks, leisurely cycling.

Media

- September 2012: Cairngorms rated in TNT website as top National Park in the UK to escape to.

Cairngorms Brand

We know the following about exposure of the Cairngorms Brand:

- Approximately 11 million vehicles per year pass CNP entry markers;
- Some 280,000 visitors per year to CNP branded visitor information centres in National Park

Objective 3 - Recent observations

- Over 300,000 visitors per year to CNP branded attractions
- 450,000 CNP branded visitor leaflets distributed per year
- Over 200 businesses and events eligible to use the brand
- 11 ranger services joint branded and all ranger bases containing info about CNP
- 9 community notices boards containing CNP branded information
- 9 CNP Panels in schools – regularly seen by c 2,750 pupils
- 12 Branded Community Path Leaflets

The latest visitor survey (2010) seems to indicate profile of CNP has been raised::

- 82% (69%) of visitors know they are in a National Park (CNPA)
- 51% (25%) said that being a National Park was important to their visit (CNPA)
- 46% could describe the brand without a visual prompt (CNPA)
- 88% (74%) think that the National Park is well managed and cared for (CNPA)
- 84% would definitely recommend the Cairngorms National Park as a destination (VS)

Objective 4 - Organisational effectiveness, efficiency and reputation

Long Term Indicators for the Park

The Long term indicators developed in 2011 apply to the Park and its attributes, not to the CNPA as an organisation; hence there are no statistics derived from that piece of work.

Objective 4 - Recent observations

Finances

	2010/11 actual	2011/12 actual	2012/13 planned
Grant in Aid '000 (includes additional capital)	5,356	5,153	5,331
Additional capital (shovel ready)	403	397	685
Total Income (includes LEADER, other contributions)	6,218	5,959	5,667
Leverage (CNPA : other)	1:4	1:4	1:4
Operational Plan spend	2,931	2,994	2,568
Discretionary spend (i.e. operational plan spend as % total income)	47%	50%	45%
Staff costs as % total income	34%	35%	40%

Audit

- Feedback from annual audit report (2011/12) good; key controls all satisfactory; unqualified opinion on accounts; no top priority recommendations raised; accounts prepared and laid in good time. Conclusion that organisation's internal control and governance objectives being met effectively.

Efficiency

- Performance in national benchmarking survey on HR, Finance, IT and estate management, within expected limits and in line with other NDPBs.

Reputation/Awareness

- **MSP's survey:** about to be repeated. But last result for 2011 showed 50% of MSPs knew Scottish National Parks well/very well; 44% were favourable/mainly favourable (48% neutral); 34% would speak highly (59% neutral). Results similar for both NPs.
- **SNH Survey** on public awareness 2011: 84% of people aware of Scotland's National Parks. A third could name a National Park unprompted. 90% of people believed National Parks to be a valuable asset to Scotland. Interesting finding in respect of LL&TT in which public confused on whether they had visited LL&TT National Park, Loch Lomond, or Loch Lomond NNR.
- **Cairngorms Visitor Survey 2009/10:** Visitor awareness of being in a National Park (Cairngorms) was 82% of whom 91% said they knew this prior to arrival. 52% of

Objective 4 - Recent observations

visitors said National Park status very or quite important in their decision to visit.

Feedback from customers of planning service:

- Started in April 2012: results to date based on 58 responses show overall 47% of customers felt the service was either Good or excellent. Commenting on six particular aspects of the service, most respondents said we were excellent with the weakest judged to be “keeping you informed of progress” where most respondents said we were good.

Media monitoring

- Cautious about how much this shows. Last report in March 2012 indicated 80 reports in print, 5 broadcast and 7 on web. 44% were positive, 5 negative and 11 neutral. Negative (about the Park) items included: car parking charges at Feshie Bridge, Gaelic on signs, Alvie flooding, underground sections of Beaully-Denny.
- Other options being considered for how to assess reputation.

Attitudes about CNPA

- Feedback from **Business Barometer Q2 2012**: reports on perceptions about external support – CBP rated highest positive, with CNPA second, and VS third. Other public bodies all negative.
- **Local Plan Challenge**: There are many aspects to the findings of the court, but important for the CNPA’s reputation is that we were found to have acted properly.

National Finances

- John Swinney announced the Draft Budget for 2013-14. The statement pledged £30m for a Green Investment Package over the next three years as well as the creation of an Energy Skills Academy to support skills in oil and gas, renewables, thermal and carbon capture. In addition, the Scottish Government will also establish a Renewable Energy Investment Fund.
- Emphasis on shovel ready projects/capital investments to boost the economy/jobs. Additional funding is proposed to be made available in various areas, including:
 - Investment of £1.5m worth of marketing to be carried out by VisitScotland.
 - £1m additional investment in the maintenance of historic buildings.
 - £1m to support Scotland’s elite athletes in the build up to the Commonwealth Games.
 - An additional £6m over two years in cycling infrastructure.

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