

State of the Park Report

Technical Annex 3

Visitor and Recreation Resources

3.1 Introduction.....	3
3.2 Data Sources	3
3.2.1 Basis of Data Collection.....	3
3.2.2 National Statistics	3
3.2.3 Tourism in Scotland.....	4
3.2.4 Visitor Attraction Monitor.....	4
3.2.5 Visitor Numbers.....	5
3.2.6 Visitor Surveys	6
3.2.7 People and Traffic Counters.....	8
3.2.8 Data Sources Used	9
3.2.9 Information Gaps – Data Sources.....	10
3.3 Visitor Numbers and Characteristics.....	10
3.3.1 Visitor Trends.....	10
3.3.2 Visitor Profile	11
3.3.3 Accommodation.....	15
3.3.4 Visitor Attitudes and Perceptions	17
3.3.5 Reasons for Visiting.....	18
3.3.6 Activity Intentions	20
3.3.7 Information Gaps – Visitor Numbers and Characteristics	21
3.4 Visitor Attractions and Locations	21
3.4.1 Popularity of Attractions	23
3.4.2 Natural Attractions.....	24
3.4.3 Information Gaps – Visitor Attractions and Locations.....	26
3.5 Recreational Activities and Networks.....	26
3.5.1 Hillwalking, Mountaineering, Climbing and Orienteering	29
3.5.2 Snowsports	32
3.5.3 Cycling and Mountain Biking	33
3.5.4 Watersports.....	35
3.5.5 Angling.....	36
3.5.6 Shooting and Sporting.....	38
3.5.7 Horse-riding.....	38
3.5.8 Other Activities.....	39
3.5.9 Clubs	39
3.5.10 Information Gaps – Recreational Activities and Networks	39
3.6 Visitor Facilities and Information Centres	39
3.6.1 Tourist Information Centres	39
3.6.2 Commercial Promotion	39
3.6.3 Community Websites.....	40
3.6.4 Visitor Information	40
3.6.5 Information Gaps – Visitor Facilities and Information Centres.....	41
3.7 Outdoor Access	41
3.7.1 Outdoor Access Strategy Audit	41
3.7.2 Promoted Paths	41
3.7.3 Rights of Way.....	42
3.7.4 Transport	44
3.7.5 Outdoor Access Events	45
3.7.6 Information Gaps – Outdoor Access.....	45
3.8 Access for All.....	45

3.8.1	All Abilities Access Survey	46
3.8.2	Information Gaps – Access for All	50
3.9	Ranger Services.....	50
3.9.1	Information Gaps – Ranger Services	52
3.10	Information and Interpretation	52
3.10.1	Information Gaps – Information and Interpretation	54

3.1 Introduction

The attractiveness of the Cairngorms National Park as a visitor destination lies in the blend of outstanding natural beauty and the rich natural and cultural heritage of the area. The Cairngorms have a scenic quality distinct from that of the rest of Scotland. The diversity of habitats and landforms and the variety of heritage create a wide range of opportunities for outdoor recreation.

This chapter sets out information currently available about the visitors to the Park and the facilities available to them during their stay. It acknowledges the contribution that visitors make to the natural, cultural, social and economic resources within the Park and their impact on them.

3.2 Data Sources

3.2.1 Basis of Data Collection

The Park was established in April 2003. Since before its inception the boundary for the Park has been a cause for debate, not least because it does not correspond wholly with other boundaries such as Census Output Areas, Local Authority Wards, Community Councils or Postcode Areas. The Park boundary is also at variance with other definitions of the Cairngorms area, including the previous Cairngorms Partnership area on which past research was based. This lack of a coterminous boundary has made the collation of existing information on visitor numbers within the Park particularly difficult. Prior to 2003/04 no data had been collected at a Park-wide level; consequently this research depends on manipulation and analysis of non-specific datasets. While national datasets encompassing the Park exist, the sample size is insufficient to allow statistically reliable disaggregation to Park level.

In order to achieve best fit from existing information, this study has subdivided the Park into Community Council areas. This has been done for a number of reasons:

- The smallest geographical measurement that Census data can be broken down to is Census Output Areas. These can then be amalgamated to build up into Community Council areas, which represent the most accurate, best fit, geographical picture of the Park achievable.
- Community Council areas can be aggregated up to provide information at former Area Tourist Board level.
- This approach allows the Park to be divided into smaller geographical areas to achieve higher resolution of data and information.
- The use of the Community Council areas allows comment to be made on a more localised basis and permits similarities and differences within the Park to be compared, contrasted and highlighted.
- Datasets for Natural, Cultural, Visitor and Recreation and Socio-Economic Resources have been collated where possible using this common area basis, which affords greater consistency, ensures comparisons are more reliable and will allow greater read-across and ultimately identification of trends.

3.2.2 National Statistics

At a UK level the Office for National Statistics directs researchers to www.staruk.org.uk, the official website of the UK Research Liaison Group. The group is made up of representatives of the national tourist boards for England, Scotland, Northern Ireland, Wales, Britain and the Department for Culture, Media and Sport. It produces a wide variety of tourism statistics for the UK, primarily the United Kingdom Tourism Survey, with some figures disaggregated to country and regional levels.

In Scotland the national tourism body is VisitScotland (formerly the Scottish Tourist Board). VisitScotland compiles and co-ordinates Scottish tourism statistics, using www.scotexchange.net as the vehicle for allowing general access to the data. VisitScotland publishes two reports annually that have been particularly useful in the preparation of this paper, 'Tourism in Scotland' and the 'Visitor Attraction Monitor'.

3.2.3 Tourism in Scotland

'Tourism in Scotland' collates figures estimating tourism value and volume in Scotland. This report is published annually and is the national source for data on visitor numbers. The report breaks the information down to former Area Tourist Board level, with no further disaggregation possible.

There are three VisitScotland Network Offices operating within the Park boundary; Aberdeen, Dundee and Inverness, with each Network Office covering a larger area which extends beyond the Park. At present data is not collected in a way which will allow disaggregation to the Park's boundary or easy comparison between areas.

Local Enterprise Companies and Local Authorities also collate information on visitor numbers for their own areas, but this has been done independently of the Park. Unfortunately, due to the lack of coterminous boundaries, it has not been possible to disaggregate this information to allow data to be provided for the Park.

3.2.4 Visitor Attraction Monitor

Visitor numbers for Scotland are also collected through the 'Visitor Attraction Monitor' for participating visitor attractions. The 'Visitor Attraction Monitor' has been prepared by the Moffat Centre for Travel and Tourism Business Development, Glasgow Caledonian University, since 1998 and is published on behalf of VisitScotland. Prior to this, from 1982 until 1997, the former Scottish Tourist Board conducted postal surveys of Scottish visitor attractions. The 'Visitor Attraction Monitor' report is not available on the internet, but can be purchased from the Moffat Centre, and a copy of the analysis is provided for all participating visitor attractions and Visit Scotland Network Offices. A 'Visitor Attraction Barometer' is also collated by the Moffat Centre. This is published monthly and is freely available via the internet. The 'Visitor Attraction Barometer' reviews performance data for attractions to provide early indication of seasonal and sectoral visitation fluctuations. The limitation of the 'Visitor Attraction Barometer', from the point of view of the State of the Park Report, is that while it shows changes at Visit Scotland Network Office, Local Enterprise Company and Category of Attraction levels, it does not break the data down any further. This again does not enable any Park-specific datasets to be extracted.

The 'Visitor Attraction Monitor' is an annual report which issues written questionnaires collecting data from businesses wishing to participate. In 2003 the 'Visitor Attraction Monitor' was sent to 986 visitor attractions fitting the definition of a visitor attraction (see Section 4.4 below). A total of 723 questionnaires were returned, representing a 73% response rate and providing valuable information on visitor attractions in Scotland. A limiting factor is that the process is, by its nature, self-selecting, as attractions have to choose to take part and

also be able to devote time to filling in the questionnaire. This may lead to gaps in data and a reduction in the ability of the 'Visitor Attraction Monitor' to identify trends.

3.2.5 Visitor Numbers

Up until relatively recently, the Cairngorms National Park Authority has only been able to estimate visitor numbers. However, a mechanism is now in place which will allow interpretation of existing data to generate figures more specific to the Park. This is being undertaken through a tourism economic activity model called STEAM (Scottish Tourism Economic Activity Monitor), developed by Global Tourism Solutions. In 2003 SQW estimates suggested that the Park might attract as many as 1.2 million visitors, generating around £240 million a year. These estimates were based on SQW's economic baseline for the Cairngorms National Park and surrounding area, using the number of accommodation businesses as a proxy, but using a geographical area much greater than the Park. At Park level, STEAM figures for 2003 gave a total visitor figure of 1.4 million and a total visitor spend of £154 million. Visitor numbers dropped very slightly in 2004, but visitor spend rose to £161 million. **Table 3.2.5** provides a numeric, executive summary of the STEAM Report 2004.

Table 3.2.5: Numeric Executive Summary of STEAM Report 2004			
Total Revenue by District (£s millions)	2004	2003	% Change
Badenoch and Strathspey Area	127.68	125.67	2
Rest of the Park	32.96	28.75	15
Total	160.64	154.42	4
Analysis by Sector of Expenditure (£s millions)			
Accommodation	35.97	34.08	6
Food and Drink	23.30	22.66	3
Recreation	9.30	9.05	3
Shopping	12.93	12.62	2
Transport	23.07	22.22	4
Indirect Expenditure	37.78	36.18	4
VAT	18.30	17.61	4
Total	160.65	154.42	4
Revenue by Category of Visitor (£s millions)			
Serviced Accommodation	97.63	94.96	3
Non-serviced Accommodation	32.62	27.78	17
Visiting Friends and Relatives	1.86	1.72	8
Day Visitors	28.54	29.97	-5
Total	160.64	154.42	4
Tourist Days (Thousands)			
Serviced Accommodation	1,035.89	980.05	6
Non-serviced Accommodation	1,086.25	909.45	19
Visiting Friends and Relatives	92.28	85.92	7
Day Visitors	850.96	894.09	-5
Total	3,065.39	2,869.52	7
Tourist Numbers (Thousands)			
Serviced Accommodation	387.39	369.02	5
Non-serviced Accommodation	149.75	137.92	9

Visiting Friends and Relatives	20.18	18.92	7
Day Visitors	850.96	894.09	-5
Total	1,408.28	1,419.95	-1
Sectors in which Employment is supported (Full-time Equivalents)			
Accommodation	2,254	2,234	1
Food and Drink	690	671	3
Recreation	274	267	3
Shopping	369	360	2
Transport	587	566	4
Total Direct Employment	4,175	4,098	2
Indirect Employment	906	868	4
Total	5,081	4,966	2

Source: STEAM Report 2004

3.2.6 Visitor Surveys

There have been a number of visitor surveys undertaken over the last 12 years, from which a broad indication as to the number of visitors to the Cairngorms area can be established. As highlighted in relation to the more general datasets, caution must be taken when working with outputs from the various surveys, as each has used different formats, sampling or surveying methods and all have been carried out within different timeframes.

Previous visitor surveys have provided useful information and have been used to inform aspects of management decision-making for the Park to date. These are, however, stand-alone studies, commissioned for specific purposes or reasons by a considerable variety and number of organisations; it is therefore difficult to draw effective comparisons or conclusions. In many cases the number of visitors interviewed has been very small, and the process for selecting interviewees may in itself be selective, elective, subjective and consequently not truly representative of the element or total population visiting the Cairngorms.

All visitor surveys conducted to date have been undertaken using a series of face-to-face interviews and self-completion questionnaires. Surveys have been split between those which have been conducted over a relatively short period of time and others which have been carried out throughout the year, thus allowing for and identifying seasonal variations in visitor numbers.

Table 3.2.6, summarises the main visitor surveys that have been carried out in the Cairngorms and surrounding area. It details when each survey was conducted and the number of visitors interviewed. These factors are important in trying to draw comparisons between the surveys.

Name of Survey	Area of Survey	Dates Surveyed	Consultant	Client	Number of Respondents
Cairngorms National Park Visitor Survey: Draft Final Report, 2004/Final Report, March	Cairngorms National Park area	May 2003 to March 2005	Lowland Market Research	Cairngorms National Park Authority	2,500 face-to-face 1,076 self-completion 3,576 Total

2005					
Tourism in Scotland	Whole of Scotland	2003	VisitScotland	VisitScotland	18.1 million tourist overnight trips
Scottish Recreation Survey 2003	Whole of Scotland	2003	TNS (2003)	Scottish Natural Heritage/The Forestry Commission	12,000 per year
Highlands of Scotland Visitor Survey 2003	Moray, Badenoch and Strathspey	May 2002 to April 2003	George Street Research (2003)	Highlands and Islands Enterprise/The Highland Council/ VisitScotland/ Highlands of Scotland Tourist Board/Scottish Natural Heritage/Forestry Enterprise	4,860 in total 1,263 in Moray, Badenoch and Strathspey
National Nature Reserve Visitor Survey 2002 (Scotland-wide, but including parts of the Park)	Abernethy/Dell Wood National Nature Reserve, Muir of Dinnet National Nature Reserve, Creag Meagaidh National Nature Reserve	2002	NFO (2003 a,b,c)	Scottish Natural Heritage	60 in Abernethy/Dell Wood National Nature Reserve 240 in Muir of Dinnet National Nature Reserve 124 in Creag Meagaidh National Nature Reserve
2001 Upper Deeside Access Trust Survey of Visitors	Braemar, Ballater and Crathie area	August and September 2001	NFO System Three	Upper Deeside Access Trust	202
Grampian Visitor Survey 1999-2000	Aberdeen and Grampian Tourist Board area	May 1999 to April 2000	NFO System Three	Aberdeen and Grampian Tourist Board	1,455 face-to-face 432 in Moray 261 in South Grampian (including Deeside)
Rothiemurchus and Glenmore Recreation Survey	Rothiemurchus and Glenmore	April 1998 to March 1999	University of Aberdeen, Mather (2000)	Scottish Natural Heritage	1,762 face-to-face 470 self-completion
Cairngorm Mountain Recreation Survey	Cairngorms	September 1997 to August 1998	Taylor and MacGregor (1999)	Scottish Natural Heritage	2,369 self-completion

East Grampian and Lochnagar Survey 1995	Glen Muick and Glen Doll	1995	University of Aberdeen, Mather (1998)	Scottish Natural Heritage	2,842
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The Cairngorms National Park Visitor Survey

In order to establish a definitive basis and understanding of visitor numbers in the Park, the Cairngorms National Park Authority commissioned Lowland Market Research to conduct the first Cairngorms National Park Visitor Survey. The aim of the study was to establish a baseline dataset which could then be updated by repeating the survey at different time intervals in the future and gathering trend data to deepen analysis and understanding. This survey was conducted between May 2003 and April 2004 and focused solely on the defined Park area. A final report was produced in March 2005, and it is envisaged that the survey will be carried out on a three yearly cycle from now on to update the baseline information. Building on the Cairngorms National Park Visitor Survey, annual STEAM surveys have also been commissioned up to 2007.

The following points should be noted in relation to data from the Cairngorms National Park Visitor Survey:

- It needs to be clearly understood that interpretation of the data ultimately depends on the basis, statistical reliability and repeatability of the survey.
- A clear rationale for establishing the number of interviews to be carried out at each location is required to ensure a representative sample of all visitors to the Park.
- The basis of the categorisation of ‘visitor types’, ie what the split is between Day Tripper, Resident, Short and Long Breaks in the Cairngorms area, is unclear – as stated above, a statistically representative sample is essential to the reliability and context of reporting and its subsequent interpretation.

In addition to the Cairngorms National Park Visitor Survey, Lowland Market Research has carried out a similar survey of Loch Lomond and The Trossachs National Park using the same format. This is intended to allow for ongoing comparisons between Scotland’s two National Parks.

3.2.7 People and Traffic Counters

In addition to the Cairngorms National Park Visitor Survey there are also a number of people and traffic counters within the Park. These are mainly operated by Scottish Natural Heritage, the Forestry Commission and a number of estates including Mar Lodge, Rothiemurchus, Cairngorm and Invercauld. Some estates also hold information on car park usage.

Appendix VR2 shows the location, type and operator for these counters. Scottish Natural Heritage currently holds data from circa 14 (there is some conflict in their records here) people counters placed at selected sites around the Park.

The information in **Appendix VR2** has been provided by Scottish Natural Heritage, and is believed to have been audited in March 2004. There is some concern over the accuracy and currency of the information provided, eg the contact given for the Angus Glens’ Ranger Service is known to have left this post in 2003.

Summary information produced using the annual data from the majority of the counters is presented in **Appendix VR3**. It is important to note that at the time of writing Scottish

Natural Heritage had not received up-to-date information from the Cairngorm Mountain Ranger Service or Mar Lodge Estate. This has a major impact on the completeness and hence the reliability of the data.

The reliability of the data also varies between different counters. In many areas counters have had to be adjusted to take account of conditions which are identified as being likely to reduce their accuracy. This includes snow cover or freezing conditions rendering pressure mats ineffective, deer traffic as well as service vehicles (eg dustbin lorries and postal vehicles). It has therefore been difficult for Scottish Natural Heritage to establish long-term, aggregated trends using the data from automatic people counters in the Cairngorms.

3.2.8 Data Sources Used

In conclusion, data on visitor numbers and resources is somewhat fragmented and may not always be consistent, with resolution at Park level frequently impossible. Analysis of visitor numbers, trends and resources in this report draws on the various data sources listed below. Specific sources are referenced throughout. The Cairngorms National Park Visitor Survey is the principal Park-specific reference source, while non-specific datasets have been analysed where possible on the basis of best fit.

Data sources used in compiling this working paper include:

Visitor Attractions and Locations

- Cairngorms National Park Visitor Survey: Draft Final Report 2004 and Final Report 2005;
- Rothiemurchus and Glenmore Recreation Survey 1998/1999;
- Visitor Attraction Monitor.

Natural Attractions

- Cairngorms National Park Visitor Guide 2004;
- Ordnance Survey Maps;
- Scottish Natural Heritage.

Recreational Activities

- Cairngorms National Park Authority Outdoor Access Audit 2005;
- Cairngorms National Park Authority Visitor Survey: Draft Final Report 2004 and Final Report 2005;
- Demand for Outdoor Recreation in National Parks 2004;
- General Household Survey 2003;
- Rothiemurchus and Glenmore Recreation Survey 1998/1999;
- STEAM Report 2004;
- Visitor Attraction Monitor;
- VisitScotland;
- Cairngorms National Park Authority Outdoor Access Audit 2005;
- www.walkingwild.com;
- www.walkingworld.com.

Tourist Information Centres

- Aberdeen and Grampian Tourist Board (now VisitScotland Aberdeen);
- Angus and Dundee Tourist Board (now VisitScotland Dundee);
- The Highlands of Scotland Tourist Board (now VisitScotland Inverness).

Access

- Cairngorms National Park Authority Outdoor Access Audit 2005;

- Land Reform (Scotland) Act 2003;
- Local Access Forums – A Guide to Good Practice, Paths for All Partnership/Scottish Natural Heritage;
- Scottish Outdoor Access Code.

Promoted Paths and Rights of Way

- A Draft Management Strategy for the Cairngorm, Rothiemurchus and Glenmore Area, Cairngorm, Rothiemurchus and Glenmore Group, 2004;
- Cairngorms National Park Authority Outdoor Access Audit 2005;
- Ordnance Survey Maps;
- The Cairngorms Massif. Natural Heritage Futures. Scottish Natural Heritage (2002);
- www.walkingwild.com;
- www.walkingworld.com.

Ranger Services

- An Evaluation of the Availability and Accessibility of Ranger Services in the Cairngorms, Elizabeth L Wilson, University of Aberdeen;
- Cairngorms National Park Authority Outdoor Access Audit 2005.

Information and Interpretation

- A Strategy and Action Plan for Sustainable Tourism;
- Cairngorms National Park Authority Outdoor Access Audit 2005;
- Learning for a Sustainable Future – Cairngorms Partnership.

3.2.9 Information Gaps – Data Sources

- Single comprehensive dataset recording all visitor numbers and resources;
- Up-to-date information on people and traffic counters.

3.3 Visitor Numbers and Characteristics

3.3.1 Visitor Trends

At a national level, overall domestic and overseas visitor trends in the UK have increased by 2.6% over the period from 1995 to 2003, according to statistics from the United Kingdom Tourism Survey and International Passenger Survey. This has been most noticeable in the overseas market, which increased by 5.1%. During the same period there has been a fall in Scottish tourism of up to 8.8%. The figures also indicate that there has been an almost 20% drop in overseas tourists to Scotland.

At a Scottish level, Tourism Scotland 2003 reports that 18.1 million tourists (domestic and overseas) took overnight trips to Scotland, and the annual expenditure was about £4.4 billion. This compares with 2002 when 20.1 million tourists took overnight trips and spent almost £4.5 billion. This indicates a decrease of 10.2% for visitor numbers and a decrease of 2.2% for visitor spend from 2002 to 2003.

At a Park level, SQW (2003) estimated that the Park would attract 1.2 million visitors annually, generating around £240 million a year. While the Park attracts a higher number of overseas visitors than Scotland as a whole, visitors are predominately from Scotland and travel in parties of two. Fifty-six percent of visitors are over 45. Two thirds stay overnight, with the most popular type of accommodation being hotels and guest houses. The main reasons for visiting were the wide range of outdoor activities, the natural beauty and the rich cultural heritage. The most popular activities were general sightseeing and walking. Visitor attitudes and perceptions of the area were very positive.

As noted above, it has not been possible to establish trends in visitor numbers specific to the Cairngorms National Park. This is due to the variation between previous visitor surveys, which have not been carried out using a common methodology and are more area specific. None of the previous studies carried out attempted to estimate overall visitor numbers. However, the availability, collection and analysis of trend data on visitors to the Park is expected to increase through specific approaches such as repeating or further developing the Cairngorms National Park Visitor Survey and using the data collected to carry out annual STEAM surveys, which will quantify visitor economic activity.

3.3.2 Visitor Profile

In an attempt to provide some colour with regard to visitors to the Park, a comparison has been made between the different visitor surveys in relation to some key characteristics. As noted earlier, care should be taken in interpreting comparisons between the surveys, but general patterns emerge.

Visitor Origin

Table 3.3.2a compares the geographical origins of visitors to the area as identified in the various surveys. Care should be taken with these figures, as there is no way of verifying the extent to which they are statistically representative.

Origin	Cairngorms National Park Visitor Survey 2003	Tourism in Scotland 2003	Highland Visitor Survey 2003 Moray, Badenoch and Strathspey	Rothiemurchus and Glenmore Recreation Survey 1998/1999	Cairngorm Mountain Recreation Survey 1997/1998
Scotland	58	44	45	58	56
Other UK	28	47	38	31	38
Overseas	15	9	17	11	4
n=	2,500 face-to-face	18.1 million tourist trips	1,263 face-to-face	1,762 face-to-face	2,369 self-completion

It is clear that the largest percentage of visitors to the Cairngorms National Park comes from within Scotland, and that this proportion is much higher than the Scottish average (in the Tourism in Scotland survey); at the same time the Cairngorms National Park appears to attract a lower number of visitors from other parts of the UK than any of the other areas studied. Both the Park and the Moray, Badenoch and Strathspey areas show significantly higher numbers of overseas visitors than the Scottish average.

Visitor Gender

Table 3.3.2b provides a comparison of the split between male and female visitors to the area.

Gender	Cairngorms National Park Visitor Survey 2003	Tourism in Scotland 2003	Highland Visitor Survey 2003 Moray, Badenoch and Strathspey	Rothiemurchus and Glenmore Recreation Survey 1998/1999	Cairngorm Mountain Recreation Survey 1997/1998

Male	52	n/a	51	54	n/a
Female	48	n/a	49	46	n/a
n=	2,500 face-to-face, 1,076 self-completion 3,576 Total	18.1 million tourist trips	1,263 face-to-face	1,762 face-to-face	2,369 self-completion

The gender split between male and female overall is fairly even across the range of surveys and locations. The higher proportion of males visiting the Rothiemurchus area may be due to the particular focus on outdoor pursuits in that area, although given the small difference this does not appear to be particularly significant.

Visitor Ages

Table 3.3.2c provides a breakdown and comparison of the ages of visitors recorded across the various surveys conducted.

Age	Cairngorms National Park Visitor Survey 2003	Tourism in Scotland 2003 (UK Tourists)	Highland Visitor Survey 2003 Moray, Badenoch and Strathspey	Rothiemurchus and Glenmore Recreation Survey 1998/1999	Cairngorm Mountain Recreation Survey 1997/1998
16 to 24	8	13	5	8	8
25 to 34	17	20	17	20	21
35 to 44	19	23	22	25	23
45 to 54	21	18	21	22	27
55 to 64	20	13	19	13	15
65+	15	13	15	6	6
Over 45	56	44	55	41	48
n=	2,500 face-to-face, 1,076 self-completion 3,576 Total	18.1 million tourist trips	1,263 face-to-face	1,762 face-to-face	2,369 self-completion

The surveys show that there are fewer younger people visiting the area than the national average for Scotland, particularly in the Moray, Badenoch and Strathspey area. They also show that there is a greater number of people who are 65 years and over visiting the area. The lower number of older people in the Rothiemurchus and Glenmore Recreation Survey and Cairngorm Mountain Recreation Survey appears to reflect the emphasis on outdoor pursuits in these areas.

The Cairngorms National Park Visitor Survey shows the largest proportion of visitors over 45 (56%). In Scotland as a whole 44% of visitors are over 45. Figures for the over 65 age group are not significantly higher than the Scottish average in the Cairngorms area (15% versus

13%). This suggests that the Cairngorms area may be attracting the empty nester visitor type, which has a higher than average level of disposable income.

Socio-Economic Profile of Visitors

Consistent comparison across the surveys is particularly difficult given the degree of variation in the categories used in reporting the findings.

In the Cairngorms National Park Visitor Survey (base of 2,500) 56% of visitors were working full-time, 9% working part-time, 4% were housewife or mother, 2% were unemployed, 5% were in full-time education and 1% Other. Retired people accounted for 22% of the respondents.

In the Cairngorm Mountain Recreation Survey (base 2,369) 66% were working full-time, 9% were working part-time, 4% were not working outside the home and 6% were in full-time education. Retired people accounted for 15% of the respondents.

In the Rothiemurchus and Glenmore Recreation Survey (base 1,762) 60% were working full-time, 11% were working part-time, 7% were not working outwith the home and 6% were in full-time education. Retired people accounted for 15% of the respondents.

The surveys indicate that the majority of visitors were working either full or part-time, with the Cairngorms National Park Visitors Survey recording the largest percentage of retired visitors. In the Cairngorms National Park Visitor Survey, the Cairngorm Mountain Recreation Survey and the Rothiemurchus and Glenmore Recreation Survey the percentage of retired people is noticeably higher than the number of people who indicated they were 65 years of age or older. This suggests that the area is attracting visitors who have taken early retirement. The surveys showed that there was a low percentage of people who were not working outwith the home.

The Tourism in Scotland and Highland Visitor Survey (Moray, Badenoch and Strathspey) did not mention working status, but instead categorised respondents by social class.

In the Tourism in Scotland Survey 34% of tourists were from AB social class, 29% of tourists were from C1, 19% of tourists were from C2 and 17% of tourists were from DE.

In the Highland Visitor Survey (Moray, Badenoch and Strathspey) (base 1,263) 57% of respondents were in ABC1, 20% of respondents came from C2D backgrounds, 21% were non-working and 3% did not give an answer.

Definition of Social Profile:

- A -higher managerial, administrative or professional;
- B -intermediate managerial, administrative or professional;
- C1 -supervisory or clerical, junior managerial, administrative or professional;
- C2 -skilled manual workers;
- D -semi-skilled and unskilled manual workers;
- E -state pensioners or widows (with no other earners in the house), casual or lowest grade workers.

Analysis of the above information suggests a substantial degree of correlation of the Highland Visitor Survey (Moray, Badenoch and Strathspey) with the employment-based surveys. Comparison with the Tourism in Scotland Survey appears to suggest that visitors to the area are relatively affluent.

Party Size

Table 3.3.2d provides a breakdown by the number of persons in parties visiting the area.

Number in Party	Cairngorms National Park Visitor Survey 2003	Tourism in Scotland 2003	Highland Visitor Survey 2003 Moray, Badenoch and Strathspey	Rothiemurchus and Glenmore Recreation Survey 1998/1999	Cairngorm Mountain Recreation Survey 1997/1998
One	16	n/a	8	11	24
Two	47	n/a	51	49	57
Three or Four	29	n/a	14	25	21
Five +	8	n/a	n/a	14	9
n=	2,500 face-to-face	18.1 million tourist trips	1,263 face-to-face	1,762 face-to-face	2,369 self-completion

All the surveys highlight that by a considerable margin the most popular grouping size is parties of two persons. This finding is supported by other aspects of the research conducted in the various surveys (eg the Cairngorms National Park Visitor Survey) which show that parties of two adults and no children are the most common. This appears to be consistent with the visitor ages in **Table 3.3.2c**, which indicates that between 41% and 56% of visitors to the area are aged over 45, ie the empty nesters. In the Highland Visitor Survey (Moray, Badenoch and Strathspey) 26% of those interviewed were parties of adults with children, while in the Cairngorms National Park Visitor Survey the figure was broadly similar at 23%. This is consistent with figures for party size above.

Type of Trip

Table 3.3.2e shows the type of trip, day visit or overnight, made by visitors as recorded in the five studies considered.

Type of Trip	Cairngorms National Park Visitor Survey 2003	Tourism in Scotland 2003	Highland Visitor Survey 2003 Moray Badenoch and Strathspey	Rothiemurchus and Glenmore Recreation Survey 1998/1999	Cairngorm Mountain Recreation Survey 1997/1998
Day Visit	33	n/a	16	22	27
Away from home overnight	67	n/a	84	78	73
n=	2,500 face-to-face, 1,076 self-completion 3,576 Total	18.1 million	1,263 face-to-face	1,762 face-to-face	2,369 self-completion

The lack of common ground between the surveys in terms of questions on this topic limits the depth of information it is possible to provide on type of trip. Only the Cairngorms National Park Visitor Survey is able to split the visitors surveyed between Residents, Day Trippers, Short Breaks (1-4 nights) and Longer Breaks (5+ nights).

Day Visitors in the Cairngorms National Park Visitor Survey make up nearly one third of those interviewed. These figures can be broken down to show that 42% of respondents who were interviewed face-to-face were on a day trip, compared with only 13% of those who answered the self-completion questionnaires. This split may reflect a degree of self-selection with regard to the self-completion questionnaires, with Day Trippers in this category not seeing the questionnaires as being relevant to their own circumstances.

The Highland Visitor Survey (Moray, Badenoch and Strathspey) recorded the largest percentage of respondents staying overnight (84%), compared with the lowest figure (67%) recorded in the Cairngorms National Park Visitor Survey. The resultant higher level of Day Visitor has implications for visitor spend within the Cairngorms National Park, as Day Visitors are known to have a lower spend per head than those staying overnight. There are further implications for the promotion of sustainable tourism balancing economic, environmental and social aims. Larger numbers of Day Visitors make a proportionately greater impact on the environment in terms of traffic, pollution, erosion, etc, but make a smaller contribution in terms of their spend and positive economic impact.

3.3.3 Accommodation

There is a wide variety of reasons for visitors to come to the Cairngorms National Park and a corresponding range of accommodation types on offer to match these differing needs.

Much of the information on accommodation in the area has, in the past, been gathered locally by former Area Tourist Boards and in some cases the Local Enterprise Company. This has meant that again the information has not been collected on a common basis, format or timeframe across the Park. For instance, Scottish Enterprise Grampian recently completed an audit of accommodation for the whole of the Grampian Area looking at types of accommodation across the spectrum from four star hotels to camping sites. The audit also gathered information on the size of establishments and included those that are tourist board-registered and graded, but also those that are not. This information is viewed as confidential by Scottish Enterprise Grampian, and it was not possible to obtain it for this report. There are no comparable studies for the Highlands or Angus areas.

As a first stage in the process for the Cairngorms National Park, the Visitor Resources department within the Park has compiled a Tourist Business Database from a variety of sources. The basis for this dataset is the database of local Tourist Board-registered accommodation providers. This has been added to by trawling numerous visitor guides and websites and by using local knowledge to include providers who are not Tourist Board-registered.

Table 3.3.3a shows the breakdown of the number of different types of accommodation within the Cairngorms National Park boundary. **Appendix VR5** lists all the accommodation providers by Community Council Area and Type of Accommodation, providing a more local perspective. It is clear from the figures that the former Highlands of Scotland Tourist Board area, which includes Aviemore and the A9 corridor, is where the highest concentration of accommodation is found. It has not been possible to identify the number of beds each provider can offer, which might give a more complete view of accommodation provision within the Park.

VisitScotland operates a Quality Assurance Scheme, of which 319 accommodation providers within the Park are members.

Table 3.3.3a: Accommodation Supply in the Park

Accommodation Type	Total	Tourist Board Area		
		Aberdeen and Grampian Highlands	Angus and Dundee	Highlands of Scotland
Hotel	84	26	1	57
Guest House	55	9	0	46
Bed and Breakfast	102	42	0	60
Self-catering Unit	97	34	0	63
Hostel	23	6	1	16
Timeshare	4	1	0	3
Caravan and Camping Site	14	3	0	11
Total	379	121	2	256

Source: Cairngorms National Park Authority Tourism Database et al

Table 3.3.3b provides a breakdown by percentage of visitors staying in each different type of accommodation. The most popular accommodation types in the local area are Hotels and Guest Houses, with 35% of Cairngorms National Park Visitor Survey respondents and 32% of Highland Visitor Survey (Moray, Badenoch and Strathspey) respondents staying there. In comparison, the Scottish average shows Staying with Friends and Relatives as the most popular option at 40%. In Scotland as a whole there are many fewer people staying in Bed and Breakfasts than in either the Cairngorms National Park Visitor Survey or the Highland Visitor Survey (Moray, Badenoch and Strathspey). The rural location and nature of provision, eg having fewer big hotels in the Cairngorms and Moray, Badenoch and Strathspey areas, may be influencing factors in this.

Table 3.3.3b: Percentage of Visitors Staying in Different Accommodation Types in the Park			
Accommodation Type	Cairngorms National Park Visitor Survey	Highland Visitor Survey 2003	Tourism Scotland 2003
Bed and Breakfast	15	18	9
Hotel and Guest House	35	32	33
Self-catering	16	17	6
Hostel	3	3	2
Timeshare	5	7	n/a
Touring Caravan and Tents	8	10	8
Staying with Friends	8	14	40
Static Caravan	2	2	n/a
Other	2	4	7
n=	2,469	1,046	18.1 million

Length of Stay

The Cairngorms National Park is a popular destination for visitors to Scotland, with a mix of day trip, short break and longer break visitors. The Cairngorms National Park Visitor Survey (self-completion questionnaire) indicates that the majority of respondents (40%) were staying in the area for between one and three nights and a further 19% were staying in the area for seven nights.

As can be seen from **Table 3.3.3c**, the largest proportion of overnight visitors are those spending all their time away from home in the Park. Those on short breaks are more likely to spend all their time away from home in the Cairngorms area. The longer break visitors are the

largest sector staying in the Park at 70%. It is not possible to differentiate whether this is at one location or at multiple locations within the Park.

Table 3.3.3c: Length of Stay in the Park			
	Visitor Type		
	Total	Short Break 1-4 nights	Longer Break 5+ nights
I am spending all of my time in the Cairngorms area	50%	62%	39%
I will spend most of my time away from home in the Cairngorms area	15%	18%	14%
I will spend some of my time away from home in the Cairngorms area	17%	9%	22%
I am touring around Scotland and will only spend a short time in the Cairngorms area	8%	2%	11%
I am just passing through the Cairngorms area to/from my holiday destination	11%	9%	13%
I am staying in the Cairngorms area, but will also use it as a base to visit other parts of Scotland	0%	0%	1%
n=	1,540	468	1,072

Source: Cairngorms National Park Visitor Survey (Draft 2003)

3.3.4 Visitor Attitudes and Perceptions

It has been difficult to compare any of the visitor surveys with regard to this topic, as again they have measured and reported the information in many different ways. This section concentrates on the results emerging from the Cairngorms National Park Visitor Survey 2003, as this study relates purely to the Cairngorms area and is the most recent study of perceptions and attitudes.

Respondents to the Cairngorms National Park Visitor Survey were asked when considering their decision to visit the Cairngorms area how important it was that the area was a National Park. Only 9% of respondents stated that it was very important, while 38% said that it was not important at all. This may in part be due to the relatively short time that the Park has been established and the lack of obvious branding in and around the Park.

Below are some points that emerged when asking visitors about their perceptions of the Cairngorms area:

- 84% either agreed or strongly agreed that there were plenty of things to do and see in the area. This is interesting when looked at in conjunction with the visitor attraction numbers, which are relatively low.
- 62% thought it was good for the area if the Park attracted a lot of visitors, and only 13% said they would have liked to see fewer other visitors. This may be an issue for the Sustainable Tourism Strategy. It may also suggest that there is plenty of space.
- 75% of visitors agreed or strongly agreed that the Park was well-managed and cared for. This will be a challenge to maintain, and identification of who will be responsible will be a critical factor.

- On a scale of 1 to 10, with 1 being low and 10 being high, 85% of respondents gave their visit to the Cairngorms an overall rating of 8 to 10, and only 1% gave it a rating of 4 or below.
- 71% of respondents rated customer service provided by visitor attractions as very good or good, while 3% of respondents stated that customer service had been poor or very poor in pubs and restaurants.

Table 3.3.4 shows the most liked aspects of the Cairngorms area by respondents to the Cairngorms National Park Visitors Survey.

Table 3.3.4: Most Liked Aspects of the Cairngorms Area %	
Aspect	People Liked %
Beautiful scenery	49
Peacefulness, easy-going pace of life	21
Mountains	21
n=3,149	
Nothing could improve the area	54
n=3,089	

Source: Cairngorms National Park Visitor Survey (Draft 2003)

3.3.5 Reasons for Visiting

Reasons for visiting the Park are many and various, but undoubtedly are substantially focused on the wide range of outdoor activities, natural beauty and rich cultural heritage which the area has to offer.

There does not appear to have been a standard format applied in the recording of categories of activities in the various visitor surveys, and consequently comparisons across them are not possible. **Table 3.3.5a** shows the reasons for visiting given by respondents to the Cairngorms National Park Visitor Survey. The responses given are specific to the Park and represent the most recent data available.

Table 3.3.5a: Cairngorms National Park Visitor Survey – Main Reasons for Visiting	
Reason given for Visiting	% of Respondents
Walking	14
Beautiful scenery	11
Visiting friends/family	8
Like the area	8
Been before	7
Peace and quiet	4
Never been before	4
Mountains/hills	3
Cairngorm Mountain Railway	3
Wildlife/plants	3
Recommended by a friend	2
n=2,837	

Source: Cairngorms National Park Visitor Survey (Draft 2003)

Walking is recorded to be the most popular reason for visiting the area, with beautiful scenery second. Variation was, however, apparent between the different categories of visitors surveyed, eg walking was cited by 26% of day trippers as having been the main reason for the trip, with only 8% of those on longer breaks responding similarly.

Table 3.3.5b shows the main reasons for visiting given by respondents to the Rothiemurchus and Glenmore Recreation Survey.

Table 3.3.5b: Rothiemurchus and Glenmore Recreation Survey – Main Reasons for Visiting	
Reason given for Visiting	% of Respondents
Walking	25
Brochure/leaflet/map/book	15
Regular visitor	9
Love it/like the area	6
Cycling	5
Weather	4
Just passing through/touring/sightseeing	4
Specific attraction	4
Sledging/skiing/wintersports	3
Scenery	3
Stay in Aviemore	2
Birds/wildlife	1
Shops/cafes	1
Watersports	1
Other	9
n=1,762	

Source: Rothiemurchus and Glenmore Recreation Survey (Mather 2000)

Table 3.3.5c shows the reasons for visiting as given by respondents to the Highland Visitor Survey in the Moray, Badenoch and Strathspey area.

Table 3.3.5c: Highland Visitor Survey – Main Reasons for Visiting	
Reasons given for Visiting	% of Respondents
Been before/knew area	19
Scenery/views/unspoilt	16
Family/friends/connections in area	16
Like area	12
Specific attraction/event	12
Peace and quiet/tranquillity	11
Mountains/hills	9
Never been before	7
Walks/hillwalking	6
Wildlife/flora/fauna	6
General sightseeing/day out	5
House here/timeshare	4
Short/weekend break	3
Close to home/convenient	3
Because of the people/friendly people	3
Lochs/Loch Ness	3
Heard/read about it/seen pictures	2
Been to other parts/to see more of Scotland	2
Recommended by friends/relatives	2
For a holiday/nice holiday	2
Showing people around	2
Wanted a change	2

n=1,263
Note: Total does not add up to 100% as multicoding possible. Only statements endorsed by more than 3% of the sample at total level are included.

Source: *Highland Visitor Survey (Moray, Badenoch and Strathspey) 200*.

The Cairngorms area is well-known for its natural beauty and environment and is clearly favoured by many walkers, but it is notable from all the surveys carried out that there is another slightly different element highlighted, that of wilderness and tranquillity, which attracts visitors to the area. The Cairngorms area appears to be perceived as able to offer unspoilt landscapes, inaccessible areas and a feeling of peace and solitude.

3.3.6 Activity Intentions

Table 3.3.6 highlights the most popular activities in which respondents took part or were going to take part during their trip to the Cairngorms area.

Activity	Total	Resident	Day Trip	Short Break	Long Break	Scottish Average
General Sightseeing	56	35	29	59	76	n/a
Walking	48	50	43	52	48	33
Heritage in total	22	14	9	19	33	n/a
Castles, monuments, churches, etc	15	3	6	13	26	39
Museums, art galleries, heritage centres, etc	12	3	4	9	21	29
Watching performing arts	2	8	0	1	2	16
Active Pursuits	20	35	?	19	14	n/a
n=	2,500	417	514	479	1,090	18.1 million

Source: *Cairngorms National Park Visitor Survey and Tourism Scotland 2003*

It can be seen from **Table 3.3.6** that General Sightseeing is the most popular activity in the Cairngorms area at 56%. It is clearly most popular with people on Longer Breaks (76%), which may correlate with the fact that 43% of Longer Breakers are aged 55 and over and may be looking for a less active holiday. By comparison only 29% of Day Trippers gave General Sightseeing as an activity, and they represented only 23% of the over 55 age segment. In **Table 3.3.6** Walking encompasses hillwalking and low-level walking of less than and greater than two miles. Hillwalking is the most popular type of walking for residents, with 41% stating they had or would take part in this activity. The emphasis changes when including the self-completion questionnaires, with 58% of respondents taking part in walking and only 15% in sightseeing. This may be, as much as anything, the result of where the questionnaires were distributed.

The number of respondents who visited heritage sights within the Cairngorms is low compared with Scotland as a whole. Heritage was most popular with Overseas Visitors (33%) and least popular with Day Trippers (9%). Although the Park's rural nature may in part be responsible for this, there are nevertheless a number of heritage attractions within the Park. This may be a market that could be targeted in order to increase visitor spend within the Park.

Active Pursuits, including climbing/mountaineering, cycling and water and snowsports, were undertaken by 20% of respondents. This activity was again most popular with residents at

35%. Active Pursuits are discussed more fully in the Recreational Activities and Networks Section.

Comparison of the activities undertaken across the visitor surveys confirms that location is an important factor in determining which activities are undertaken. The activities undertaken in the Rothiemurchus and Glenmore Recreation Survey have a more rural bias, eg walking and wildlife observation, whereas the Grampian Visitor Survey activities were more urban-focused, eg general sightseeing and shopping. The Park has both urban and rural areas, giving it a broader range of activities in which visitors can take part.

The results of the Cairngorms National Park Visitor Survey indicate that the most visited town in the Park is Aviemore with 48% (self-completion 56% and face-to-face 45%) of respondents having visited it, followed by Grantown-on-Spey with 28% (self-completion 35% and face-to-face 25%). It may be sensible to view these figures in relation to the distribution of the questionnaires, which may have been random. Actual distribution patterns of the self-completion questionnaires are not known, but of the 2,500 interviews which took place, some 233 interviews took place in Aviemore, while the next most popular interview location was Braemar (171 interviews).

3.3.7 Information Gaps – Visitor Numbers and Characteristics

- Trends in visitor numbers;
- Number of beds each accommodation provider can offer within the Park.

3.4 Visitor Attractions and Locations

For the purpose of this paper a visitor attraction has been defined as “an attraction where it is feasible to charge admission for the sole purpose of sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest or education; rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists, as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment, etc, and must be receiving revenue directly from the visitors.” This is the definition of a visitor attraction used in the Visitor Attraction Monitor, published on behalf of VisitScotland.

In seeking to establish an accurate number of visitor attractions within the Cairngorms National Park many different sources have been used, including visitor and ‘What’s On’ guides, tourist brochures, internet searches and local knowledge. This is not a straightforward task, as some of the visitor attractions are not registered with official bodies. However, some of the larger attractions are members of the Association of Scottish Visitor Attractions, which has 419 registered members throughout Scotland, 26 within the Park. In addition, VisitScotland operates a Quality Assurance Scheme, of which there are 31 member attractions within the Park. **Table 3.4** shows 73 visitor attractions identified within the Park. This includes both sites where an entry fee is paid and where entry is free. A full list of these can be found in **Appendix VR6**.

Table 3.4 provides a summary of visitor attractions within the Cairngorms National Park.

Table 3.4: Summary of Visitor Attractions within the Park				
Attraction	Tourist Board Areas			Total
	Aberdeen and	Angus and	Highlands of	

	Grampian Highlands	Dundee	Scotland	
Castles and Forts	7	1	3	11
Distilleries, Vineyards and Breweries	2	0	5	7
Gardens	3	0	1	4
Heritage and Visitor Centres	1	1	6	8
Highland Games	4	0	3	7
Museums and Art Galleries	3	1	6	10
Nature Reserves, Wetlands and Wildlife Parks	4	1	11	16
Places of Worship*	1	0	0	1
Steam and Heritage Railways	0	0	1	1
Other	0	0	8	8
Total	25	4	44	73
* = Crathie Church				

Source: Aberdeen and Grampian Highlands Tourist Board; Angus Council Ranger Service; Cairngorms Countryside Events 2004; Cairngorms National Park Visitor Guide 2004

Appendix VR6 provides details on each of the individual visitor attractions and indicates which Community Council area they are in. This Appendix aims to draw together all the visitor attractions in the one place and represent the spread both by type and geography. They are also listed by type of attraction and by area where the attraction is based.

Given its historical importance, it is not surprising that the largest concentration of visitor attractions is located within Aviemore and its surrounding area. The number and types of attractions are various, ranging from Castles and Forts to Art Galleries and Museums to National Nature Reserves.

Visitor Attraction Trends

In 2003 there were 651 Scottish visitor attractions which had also completed the Visitor Attraction Monitor Survey in 2002, allowing a year-on-year comparison to be made. This included 81 visitor attractions in the former Aberdeen and Grampian Highlands Tourist Board area and 86 in the former Highlands of Scotland Tourist Board area. Of these there are a total of 19 visitor attractions listed in the Visitor Attraction Monitor for 2002 and 2003 that fall within the Cairngorms National Park boundary. A full list of these 19 attractions is shown in **Appendix VR4**. The Visitor Attraction Monitor listed no visitor attractions in the former Angus and Dundee Tourist Board area which are within the Cairngorms National Park boundary.

It is possible to look at some trend data within the small number of visitor attractions in the area contained in the annual Visitor Attraction Monitor. Due to gaps in the data it has been difficult to build up a complete picture. When looking at the figures in **Appendix VR4**, they should be viewed in the light of the events of 11 September and the Foot and Mouth Disease outbreak, both in 2001 and both of which had a major impact.

All figures and comments relate to visitor attractions listed in the Visitor Attraction Monitor and within the Cairngorms National Park boundary.

- The Visitor Attraction Monitor showed that in 2003 there were a total of 732,635 visits recorded by the 19 participating visitor attractions, compared with 776,441 visits in 2002. This represented a year-on-year drop of 5.6%. If Rothiemurchus Estate and Glenshee Ski Centre are omitted, there is an overall increase of 4.2% to visitor numbers for the remaining attractions.

- In 2003 there were significant increases in visitors to The Glenlivet Distillery (up 24.6%), Tomintoul Museum and Visitor Centre (up 13.9%) and Cairngorm Mountain Railway (up 10.8%). The Cairngorm Mountain Railway shows the largest visitor numbers in the area from 98,000 in 2000 to 187,015 in 2003, an increase of 91%.
- The attractions showing the most significant decreases in 2003 were Rothiemurchus Estate (down 57.4%), Glenshee Ski Centre (down 44.7%) and Strathspey Steam Railway (down 11.1%).

Overall visitor attraction numbers in Scotland increased by 2.2% from 2002 to 2003 and by 4.7% from 2001 to 2002.

In 2002/2003 those visiting attractions listed in the Visitor Attraction Monitor increased by 3.8% in the former Aberdeen and Grampian Highlands Tourist Board area and by 3.5% in the former Highlands of Scotland Tourist Board area. There are no visitor attractions listed in the Visitor Attractions Monitor for the former Angus and Dundee Tourist Board area which are within the Park boundary.

Overall, listed visitor attractions in rural locations in Scotland also increased their numbers by 4.3%, compared with 0.2% in urban locations and 5.1% in seaside locations. The increase in visits to seaside attractions may be explained by the good weather during 2003. Reasons given in the Visitor Attraction Monitor for the increase in visitor numbers included the good weather experienced in 2003, an increase in overseas and domestic marketing and a number of new exhibitions. Good weather can also be seen as a disadvantage for indoor activities and is also thought to have contributed to the drop in visitor numbers at the Glenshee Ski Centre.

The overall visitor numbers to attractions in the Cairngorms area, as shown in the Visitor Attraction Monitor, dropped by 5.6% from 2002 to 2003. The figures are affected by dramatic drops in 2 out of the 19 visitor attractions, the Glenshee Ski Centre and Rothiemurchus Estate. Unfortunately, neither of these attractions took part in the Visitor Attraction Monitor surveys in 2000 and 2001, so it is not possible to look at these figures in this wider context.

Frequency of Monitoring

There has been no set pattern for monitoring visitor numbers in the Cairngorms National Park to date, but it is envisaged that the Cairngorms National Park Visitor Survey will be carried out on a three yearly cycle from now onwards.

It appears that the only visitor survey that has been carried out more than once is the Highland Visitor Survey (Moray, Badenoch and Strathspey). This was carried out in 1997 and 2003. All the other local studies have been one-offs and not repeated, so it is not possible to establish trends from them.

3.4.1 Popularity of Attractions

The Cairngorms National Park Visitor Survey established numbers at visitor attractions in the Park by asking respondents: “So far on your day out/visit to the Cairngorms area which attractions, both natural and built, if any, have you/will you visit?”

Table 3.4.1a identifies the top 10 visitor attractions in the Cairngorms area from the 32 different attractions cited in the survey.

Table 3.4.1a: Top 10 Most Visited Attractions in the Cairngorms Area	
Attraction	% of People Visiting
Cairngorm Mountain Railway	18

Rothiemurchus Visitor Centre	9
Speyside Heather Centre, Dulnain Bridge	9
The Lecht	9
Glenmore Forest Park Visitor Centre	8
Landmark Visitor Centre	8
Loch an Eilein, Rothiemurchus	8
Balmoral	8
Glen Muick	7
Highland Folk Museum, Kinguissie	7
n=2,500	

Source: Cairngorms National Park Visitor Survey (Draft 2003)

Further interpretation of the figures in **Table 3.4.1a** is difficult, as trends cannot be established without previous data. **Table 3.4.1b** shows the breakdown, by visitor types, of those who visited none of the attractions cited. This may give some indication as to which type of visitor could be most effectively targeted.

Attraction	Total	Resident	Day Tripper	Short Break	Longer Break
None of these	34	38	50	34	25
n =	2,500	417	514	479	1,090

Source: Cairngorms National Park Visitor Survey (Draft 2003)

Thirty-four percent of total respondents said they had not visited any of the listed visitor attractions, with 50% of Day Trippers not having visited any. It is, as would be expected, the members of the Longer Break group who appear to have undertaken most visits to the listed attractions.

3.4.2 Natural Attractions

The Cairngorms National Park is, by its very nature, substantially comprised of natural attractions. In the absence of primary research, a definition of what exactly constitutes a natural attraction of importance to Park visitors in this context was not feasible, but it is possible to identify some of the well-known sites. Fuller information on the promoted natural attractions is provided in **Appendix VR10**.

The Cairngorm mountains have a scenic character which is distinct from that of the rest of Scotland. These are granite hills, and the Cairngorm granite intrusion is one of the largest in the British Isles, displaying a wide range of classic granite landforms. It is also a glaciated terrain that exhibits splendid corries, over-deepened valleys and roches moutonnées. Equally, it is a fine example of a landscape of selective, linear, glacial erosion. Glacial erosion has been concentrated in the valleys, while the adjacent plateau has been left little modified by the passage of ice. Here landforms can be seen with origins predating the Ice Age. The Cairngorms also include the largest area of high ground in Britain. The climate of the high tops is as severe as in arctic regions, and a range of periglacial landforms has developed, reflecting the central importance of frost action, both now and in the past (Hall, Adrian, Cairngorm Landscapes [online] [Edinburgh, Scotland] December 2002, last updated 26 Jan 2005). There is also an interpretation centre at the top of the funicular where there is information on weather and its role in landscaping the countryside.

Burn o' Vat

This is a geological feature created by glacial meltwater during the Ice Age. The glacial meltwaters have ground down through the rock to make this spectacular landform. There is a Scottish Natural Heritage visitor centre, interpretation on how Burn o' Vat was formed and also information on flora and fauna.

Corrie Fee

A large, relatively easily accessed corrie, containing beautiful alpine flowers, rare mountain willows clinging to the crags, golden eagles and peregrines.

Invercauld

On Invercauld Estate when walking up Glen Quoich, the tors of Ben Avon, which were created through erosion, may be visible. The Punch Bowl, a little farther up Glen Quoich, is a hollow in the rock created by water erosion.

Spittal of Glen Muick

It is possible to see the mountain of Lochnagar while in the Nature Reserve at Glen Muick. Lochnagar is a mass of granite which has been shaped by glaciation to form corries. In the past there have been geology bookmarks, and it is hoped that this year there will be an information board on the geology, geomorphology and land-use of the area.

Muir of Dinnet

An area of moorland and birch forest designated as a Nature Reserve on the north side of the River Dee in Aberdeenshire, the Muir of Dinnet lies between Aboyne and Ballater to the west and east and between Loch Kinord and the River Dee to the north and south. Landforms at this site have been formed due to glacier ice melting, eskers and kettle holes.

Linn of Dee

A narrow gorge and waterfall on the River Dee. The river runs through a narrow gorge, and a walk up the track will give great views of the Cairngorms, including the Lairig Ghru.

Rothiemurchus Forest

A large area of easily accessed Caledonian pine forest with good examples of montane scrub.

Allt Mor

A river walk where a number of geological features are highlighted. Rising in the south eastern foothills of Carn a' Bhothain Mholaich, the Allt Mor flows in a southerly direction, passing to the east of Loch Gynack and through Kingussie. It empties into the River Spey, north west of the Ruthven Barracks. It is explained more fully in a leaflet called 'Allt Mor – Trails Through Time', and there is interpretation provided at the Forest Enterprise Centre and panels on the trail which relate to the leaflet.

Dalnain Bridge

At the north end of Dalnain Bridge village there is a good display of roches moutonnées, a type of glaciated rock which has been smoothed and shaped by glacier scouring. There is interpretation, stone-type panels and a walk around the site.

River Feshie

This site is important for river studies, in that present and past river systems can be seen through landforms.

Farlitter Crag

The walk around the lochs highlights some features associated with glaciation, eg kettle holes, erratics and roches moutonnées. There is also a leaflet entitled 'Farlitter Crag – Trails Through Time', which provides more details on the walk.

Abernethy Forest

Abernethy Forest encompasses the Loch Garten Visitor Centre and is famous for the ospreys that can be seen from the Osprey Centre in summer. There is also a peat research site and a rare Caledonian pine forest, where crested tits, Scottish crossbills and red squirrels may be seen. Studies into the soil have revealed pollen and fossils which tell us what the vegetation was like 10,000 years ago.

Ryvoan

A narrow pass connecting Glenmore and Abernethy passing the green lochan of Lochan Uaine. Features seen on this walk include eskers, a u-shaped valley and moraines which have been created due to glaciation. The leaflet 'Ryvoan – Trails Through Time' provides more details.

3.4.3 Information Gaps – Visitor Attractions and Locations

- Single comprehensive dataset recording all visitor attractions in the Park.

3.5 Recreational Activities and Networks

The Cairngorms area is well-known and popular as a destination for a wide range of recreational activities. The top outdoor activity in the area, as seen from the Cairngorms Visitor Survey, is walking. Active pursuits are not identified individually in the survey, but cycling, canoeing, snowsports, watersports, angling, golf and fieldsports are among the other popular activities.

There are a number of businesses which have grown up around the natural assets offered by the Cairngorms. Given the popularity of the A9 corridor as the main access route, it is not surprising that the majority of the businesses associated with recreational activities within the Park are based in and around Aviemore and the nearby Spey Valley.

It has been previously acknowledged by a number of surveys, including 'Demand For Outdoor Recreation in the English National Parks' by Sheffield Hallam University on behalf of the Countryside Agency, "that it is difficult to obtain reliable data on outdoor activities due in part to the different research methodologies used and a general sparsity of research into this area."

The General Household Survey is a survey carried out annually over a 12 month period to even out seasonal variations. It covers many different topics, and has had a section on sport and leisure in the 1987, 1990, 1993, 1996 and 2002 surveys. The sample size varies between 15,000 and 18,000 and is a representative sample of the population in the UK which is 16 years and older. The General Household Survey helps to highlight trends with regard to participation rates in outdoor activities.

Since 1987 the general trend for participation in one sport (including walking) has shown a small decline. The General Household Survey showed that in 1987 adults taking part in one sport in the four weeks before interview was 61%. This rose to 65% between 1990 and 1996, but reduced to 59% in 2002. The General Household Survey indicated that Scotland had the highest participation rates in the country, and it is suggested that this is due to the higher proportions of people walking.

Based on annual participation (participation in the last 12 months), walking (46%) was the most popular sports activity, followed by swimming (35%), keep fit/yoga – including aerobics and dance exercise (22%), cycling (19%) and cuesports (17%). Men were more likely than women to have participated in at least one sport, game or physical activity, including or excluding walking, in either the four weeks or 12 months before interview.

VisitScotland has produced an ‘Activities Holidays 2003’ factsheet relating to activity holidays in Scotland in 2003, with information taken from the United Kingdom Tourism Survey. The figures used are based on three year averages for the 2001 to 2003 period. The factsheet indicates that there were as many as 2.5 million activity holidays per year in Scotland, where activity is the main purpose of the trip. The average length of stay was four nights, and the former Highlands of Scotland Tourist Board area was the most popular destination (21%). The former Tourist Board areas of Aberdeen and Grampian Highlands and Angus and Dundee attracted 5% and 3% of the visitors respectively. This generated on average £607 million, concentrated over the months July to September (35%). The spread of activity holidays may be more even in the Cairngorms area due to the higher levels of wintersports available.

The factsheet reports the top five activities for visitors on activity holidays are walking (18%), visiting heritage sites (14%), watching the performing arts (10%), golfing (9%) and visiting artistic or heritage exhibits (7%).

As part of the ‘Demand for Outdoor Recreation in The English National Parks’ study, analysis is undertaken of currently available information on numbers of visitors to National Parks and the activities in which they take part. **Table 4.5a** collates this information on activities undertaken from the All Parks Visitor Survey of 1994.

Table 3.5a: Selected Activities undertaken by Visitors to National Parks, the Broads and Rivers of The New Forest %				
Activity	Day trip	Holiday visitors staying inside the Park	Holiday visitors staying outside the Park	All visitors
General sightseeing/driving around	56	74	88	70
Walking/strolling – less than 1 hour	37	48	54	45
Walking – 1-4 hours	31	57	41	43
Hill or fell-walking – for more than 4 hours	14	27	13	18
Boat trips/cruise	6	14	9	11
Cycling/mountain biking	5	8	4	6
Riding/pony-trekking	1	4	5	3
Angling	3	4	2	3
Guided walk	1	2	1	2
Climbing	2	2	1	1
Caving	1	1	1	1
n=	2,966	2,865	1,969	7,795
Note: This table includes all activities undertaken “during this visit”. Percentages can therefore add up to more than 100% (and some activities are omitted from the original table in the report). Holidaymakers’ visits are also longer than day trip visits.				

Source: All Parks Visitor Survey 1994

The information above highlights one of the drawbacks in comparing a range of National Parks. Parks in different parts of the county focus on specific activities depending on their character and opportunities for recreational activities. For example, the Broads and the Lake District have a higher number of visitors participating in boat trips, whereas Exmoor has a greater number of visitors participating in horse-riding.

The researchers from Sheffield Hallam University caveated the table above by saying that these figures must be treated with some caution (as the researchers for the All Parks Visitor Survey themselves conclude). There are clear concerns expressed in this research about bias in the figures due to the methodology employed to undertake the research. Indeed, the total number of visitor days estimated in the case of at least two English Parks (the Lake District and the Peak District) is thought to be seriously under-estimated. Also, due to the sampling methodology, it is thought that the number of visitor days for off-road visitors, active recreationists avoiding busy locations, and local residents avoiding busy places, are all under-estimated.

It is not only businesses based in the Park that take advantage of the recreational opportunities offered by the area. The probability is that many more businesses outside the Park boundary bring visitors to the Park, whether for snowsports, climbing in all its forms, guided walks, cycling or watersports. Unfortunately, it has not been possible to quantify the numbers this is likely to entail.

It has also been difficult to identify accurately all of the activity providers within the Park, as there is no centralised dataset. However, **Table 3.5b** gathers together businesses that are based in the Park using local tourist information, Cairngorms visitor guides, internet searches and associated membership of the Adventure Activities Licensing Authority. There are 11 outdoor recreation businesses within the Park boundary with Adventure Activities Licensing Authority membership, and they are, without exception, multi-activity providers. Activities offered through these businesses include abseiling, orienteering, gorge-scrambling, hillwalking and mountaineering (includes journeys carried out on snowshoes), rock climbing, ice climbing, off-road cycling, kayaking, open canoeing, sailing, white water rafting, improvised rafting, windsurfing, coasteering (traversing the coast by climbing and swimming, sometimes jumping from the rocks), sea level traversing, paddle surfing, ski touring and off-piste snowboarding.

Table 3.5b: Businesses based within the Park offering Recreational Activities				
	Tourist Board Areas			Total
	Aberdeen & Grampian Highlands	Angus and Dundee	Highlands of Scotland	
Multi-activity providers including watersports	1	0	10	11
Cycling including off-road	1	0	9	10
Angling	3	0	5	8
Golf	2	0	7	10
Pony-trekking	2	0	2	4
Skiing/Wintersports	4	0	6	10
Walking/Mountaineering	3	0	6	9
Other activities	1	0	7	8
Total	17	0	52	70

Source: Aberdeen and Grampian Highlands Tourist Board; Angus Council Ranger Service; Cairngorms Countryside Events 2004; Cairngorms National Park Visitor Guide 2004

The figures relating to provision of angling and the complete absence of fieldsports provide a clear illustration of the limitations of this information and the different ways in which activities are marketed and accessed.

Outdoor recreation has been seen as an opportunity for a number of estates to diversify from their core business, for example Rothiemurchus Estate which offers a wide range of activities including mountain bike trails, path networks (including an all ability trail), fishing, clay pigeon shooting and 4x4 off-road driving, as well as several types of accommodation.

Organisation(s) Involved

A wide variety of organisations are involved in the many types of recreational activities which are available throughout the Park. The main organisations involved in the development and promotion of those activities are listed in **Table 3.5c**.

Table 3.5c: Recreational Activities and the Organisations Involved	
Recreational Activity	Organisations Involved
Angling	Centre for Ecology and Hydrology Salmon Fisheries Boards Association of Salmon Fisheries Boards Scottish Environment Protection Agency Local angling clubs and associations Angling and river improvement associations Salmon and Trout Association North Atlantic Salmon Conservation Organisation Scottish Rural Property and Business Association The Game Conservancy Trust
Bird-watching	British Trust for Ornithology The Royal Society for the Protection of Birds
Canoeing	Scottish Canoe Association
Cycling/mountain biking	Cycling Scotland Cyclists Touring Club Scottish Cycling Union Scottish Cycling Development Project Sustrans
Equestrian Trails	British Horse Society
Fieldsports	British Association for Shooting and Conservation Scottish Rural Property and Business Association Deer Management Groups The Game Conservancy Trust
Gliding	British Gliding Association Scottish Gliding Association
Hillwalking/Mountaineering	Association of Mountaineering Instructors British Mountain Guides Mountaineering Council of Scotland Ramblers' Association Scottish Countryside Access Network Scottish Mountaineering Club
Orienteering	British Orienteering Federation
Wintersports	British Association of Ski Patrols British Association of Ski Instructors Snowsports Scotland The Lecht Ski Centre Cairngorm Ski Centre Glenshee Ski Centre

3.5.1 Hillwalking, Mountaineering, Climbing and Orienteering

With five peaks above 4,000 feet (Ben MacDui, Cairn Gorm, Cairn Toul and Sgor an Lochan Uaine), the Cairngorms have long laid claim to being the roof of Scotland. A popular destination for walkers of all standards, the Cairngorms have something for everyone, from all ability, low-level walks to the higher and more technical peaks, which demand good map-reading and navigational skills.

Within (and in part forming) the Park boundary, there are 49 Munros (hills over 3,000 feet high) and 23 Corbetts (hills between 2,500 and 2,999 feet high). The land above 600 metres is known as the montane zone, and is the largest area of arctic mountain landscape in Britain. While heather moorland accounts for around 45% of the Cairngorms area and is often accessed without the use of paths and tracks, the latter remain a popular means of accessing moorlands, high plateaux and peaks, particularly Munros. The most popular access points are the Coire Cas Car Park, Glenmore Forest Park and Rothiemurchus, Abernethy Forest south of Nethy Bridge, Glen Feshie south of Kincaig, Linn of Dee, Glen Muick, The Keiloch, Glen Clova, Glen Avon and various points alongside the A9.

In the major river valleys and their surrounding areas, lowland and woodland paths and tracks provide links and shortcuts between settlements, as well as opportunities for a wide range of outdoor recreation activities. The Forestry Commission owns 16 areas of forestry within the Park and promotes and manages recreation opportunities in six of these forests (Pannanich, Cambus o' May, Glen Doll, Glenmore, Inshriach and Strathmashie). Other Forestry Commission and commercial plantations also provide a network of vehicle access tracks, which are often used by low-level walkers and provide potential for linking to other routes.

Climbing takes place on mountain and lowland crags in both summer and winter, the latter being more popular due to the favourable sub-arctic climatic conditions. Winter climbing is confined to the upper mountain crags (above 900 metres) in the Cairngorms and to a slightly lower level in the Angus Glens. The Northern Corries of Cairngorm are particularly busy, due to ease of access, car parking and associated facilities at 600 metres and reliability of condition. The most popular crags are Coire an t-Sneachda, Coire an Lochain, Shelter Stone, Carn Etchachan and Hell's Lum Crag. More difficult to access are the Garbh Coire of Beinn a'Bhuird and Garbh Coire Mor of Braeriach. Lochnagar is also a highly popular and reliable venue, while in Glen Doll winter climbing takes place in Corrie Fee and the Winter Corrie, both reputed areas, but at a lower altitude so prone to fickle climbing conditions.

In summer rock climbing takes place on the above venues and also on Coire Sputan Dearg, Creag an Coire Etchachan, Stag Rocks and Creag an Dubh Loch. Lowland roadside crags are also used, notably Creag Dubh, Huntly's Cave, Kingussie Crag and Farleitter in Strathspey, the Pass of Ballater, Pannanich Hill, Cambus o' May, An Cadha Dubh in Deeside and Red Craig in Glen Clova.

The central Cairngorms massif has a few bothies, but none are located near to climbing areas, with the exception of Hutchison Memorial Hut in Upper Glen Derry and the very basic Garbh Coire emergency shelter under Braeriach. Howffs exist at Clach Dhian at the foot of Shelter Stone crag and on the access route to Ben A'an and Beinn a'Bhuird. The newly-built Bob Scott's Bothy offers a very simple base for climbing parties.

The Cairngorms area is a prime location for orienteering, with The National Orienteering Centre at Glenmore Lodge in Badenoch and Strathsey providing an opportunity for clubs throughout the UK to train and participate in orienteering. There are four types of orienteering – foot, mountain bike, ski and trail. Foot orienteering can take place on almost any area of open land, while opportunities for ski orienteering are limited due to poor ski conditions. Mountain bike orienteering is done on trails to minimise any environmental impact. There is a permanent trail orienteering course at Glenmore Forest and a number of permanent and mapped foot orienteering courses at various locations throughout the Park (see **Table 4.5.1**).

Table 3.5.1: Permanent and Mapped Orienteering Courses within the Park			
Area	Location	Managed	Type
Deeside	Cambus o' May	The Forestry Commission	Permanent
	Creag Choinnich, Braemar	Sport Any Way	
Donside	Ben Newe, Strathdon	Gordon Woodlands	Permanent
Badenoch and Strathspey	Achelán, Glen Feshie	Glenmore National Orienteering Centre	Mapped
	Alvie, Kincaig	Glenmore National Orienteering Centre	Mapped
	Anagach Woods, Grantown-on-Spey	Glenmore National Orienteering Centre	Mapped
	Avielochan, Aviemore	Glenmore National Orienteering Centre	Mapped
	Badaguish, Glenmore	Glenmore National Orienteering Centre	Mapped
	Craigbuie, Kingussie	Glenmore National Orienteering Centre	Mapped
	Docharn and Deishar, Boat of Garten	Glenmore National Orienteering Centre	Mapped
	Dunachton, Kincaig	Glenmore National Orienteering Centre	Mapped
	Ellan Wood, Carrbridge	Glenmore National Orienteering Centre	Mapped
	Gorsteán, Laggan	Glenmore National Orienteering Centre	Mapped
	Glen Truim	Glenmore National Orienteering Centre	Mapped

Source: Cairngorms National Park Visitor Survey (Draft 2003)

The Park has been home to a number of orienteering events including the World Masters Championships in 2004 and the World Orienteering Championships in 1999. The Scottish Six Day International Orienteering Festival, held once every two years, was held in Strathspey in 1995, Moray in 2003, Deeside in 2005 and is due to be held on Speyside in 2007.

In the Cairngorms National Park Visitor Survey overall 26% of respondents stated that they had or would take part in hillwalking, which was most popular with residents at 41%. Climbing/mountaineering was cited by 4% of respondents as an activity they would or had taken part in, again being most popular with residents at 12%. This smaller number of climbers/mountaineers is likely to reflect the remote locations where climbing takes place, and the difficulty in capturing information on this group of visitors. In the Highland Visitors Survey (Moray, Badenoch and Strathspey) 19% of respondents took part in hillwalking and 3% took part in climbing/mountaineering.

It would be almost impossible to ascertain the number of hillwalking, mountaineering and climbing clubs which use the Cairngorms; however, there are 140 clubs in Scotland affiliated to the Mountaineering Council for Scotland, which describes itself as “the representative body for climbers, walkers, mountaineers and cross country skiers who enjoy the Scottish mountains.” It would seem likely that a large number of these clubs will make visits to the Cairngorm range, as it is has some of the most challenging climbing in Scotland.

The ‘Walkers Welcome’ Scheme, developed by VisitScotland and the Mountaineering Council of Scotland, now has 95 accommodation providers within the Park participating in

the scheme. The scheme requires accommodation providers to offer certain facilities for walkers, including drying areas, packed lunches, walking information, etc.

Increases in participation in outdoor recreation have been recorded since the 1950s. This is evidenced by the number of hillwalkers (of all abilities) completing all 284 Munros, the number of mountain rescues made and the number of hillwalking and mountaineering clubs which have been established (Scottish Natural Heritage 2002).

3.5.2 Snowsports

Three of the five Scottish ski centres are located in the Cairngorms National Park. These are Cairngorm, Glenshee and the Lecht, providing facilities for downhill skiers, snowboarders and telemarkers. There are also three dry ski slopes in the Park at the Lecht, Loch Insh Watersports and the Hilton Craigendarroch Country Club near Ballater.

Established in 1960, the Cairngorm Ski Centre is the largest of the three centres, with an area of 844 hectares and capacity for 5,000 to 6,000 skiers. The centre operates a funicular railway and 15 ski lifts, starting at 640 metres and rising to 1,150 metres. There are 30 runs – 2 black, 8 red, 11 blue and 9 green. When snow conditions allow a terrain park is constructed by sculpting the snow to create jumps, ramps and rails. The Uphill Ski Club (now part of Disability Snowsport UK) has a purpose-built, adaptive, snowsport centre at Cairngorm Mountain, offering lessons and equipment for all disabilities. Cairngorm Ski Centre is the only ski centre in the Park served by public transport.

Glenshee Ski Centre, which was established in 1962, has an area of 790 hectares and has capacity for 6,000 skiers. The centre operates 20 ski lifts, with an uplift capacity of 14,750 persons per hour. The base elevation is 650 metres, rising to a summit elevation of 1,068 metres. There are 38 runs – 2 black, 13 red, 13 blue and 10 green. A natural half-pipe provides good jumping, and when snow conditions allow further jumps and rails are installed. The Braemar-based charity Sport Any Way has a base at Glenshee and provides adaptive equipment and instruction for all disabilities. Glenshee and Braemar are also home to the annual Telemark Festival, attracting participants from home and abroad.

The Lecht Ski Centre, established in 1977, is the most recent of the ski centres. It is also the smallest, with an area of 210 hectares and capacity for 2,500 skiers. At a base height of 762 metres, the centre has 14 ski lifts, with 20 ski runs – 1 black, 5 red, 7 blue and 7 green. A permanent terrain park has equipment for cutting half-pipes when snow conditions allow. Tubing facilities are also available, allowing participants to slide downhill on an inflatable tube.

Ski-mountaineering, back and cross country skiing opportunities exist in the areas surrounding the ski centres. Cross country skiing is predominantly carried out at lower levels on relatively flat trails at Rothiemurchus and Glen Tanar Estates and Inshriach and Glenmulliach Forests.

The number of downhill skiers in the Cairngorms area has declined substantially since the late 1980s. Between 1986 and 1991, the mean number of skier days per annum was 491,393. In contrast, the mean number of skier days per annum between 1995 and 1999 was 265,058, and in 2000/03 the number fell to 205,165.

However, snowsports are still a major attraction in the Cairngorms, and there are at least seven clubs active in the area. In the Cairngorms National Park Visitor Survey skiing was cited as the third most popular activity (11%) that respondents had or would take part in during their stay in the Cairngorms area. From the Highland Visitor Survey (Moray,

Badenoch and Strathspey) it can be seen that 9% of respondents took part in skiing during November and April. There are a number of reasons for the decline in ski numbers, including changing weather patterns resulting in unreliable snow cover and the increase in lower cost packages to overseas destinations. However, Snowsport Scotland indicated that the main reason for the variation in skier numbers was directly linked to the amount of snow. There is an undeniable change in demographics, ie less younger people and more older people, but as far as Snowsport Scotland is aware there is no research at present that could identify any link between demographic changes and the decline in skier numbers.

In the face of declining skier numbers, ski centres have sought to diversify into non-skiing activities, so as to continue operating and retain core staff. The Cairngorm Mountain Railway development with its funicular railway, visitor centre, footpaths and mountain garden is the most popular visitor attraction in the Cairngorms National Park with 187,015 visitors in 2003, a 90% increase since 2000. The Glenshee Chairlift Company has diversified their activities by opening the Glen Isla Golf Club in nearby Alyth. The Lecht has upgraded its visitor facilities and activities and now provides go-karts and quad bikes at the centre's car park during the non-skiing season.

3.5.3 Cycling and Mountain Biking

Cycling is a popular sport within the Cairngorms National Park, with 9% of respondents to the Cairngorms National Park Visitor Survey indicating that they have or would take part in the sport during their stay. The Park provides facilities for many different types of cycling, whether it is purpose-built, low-level cycling tracks or the more adventurous mountain biking centre at Laggan. Cycling is one of the top five sports in the UK as a whole, with 19% of the population participating, according to the General Household Survey 2003. This figure has risen slightly since 1987, but follows the overall sports participation trend of peaking in 1996 and reducing in 2002.

Much of the cycling in the Cairngorms is road biking carried out on road networks throughout the Park. All roads in the Park are held in the Scottish Paths Record. At present there are no dedicated cycle lanes on these roads. A number of routes in and around the Park are specifically promoted for cycling through leaflets and waymarking. The Glenlivet Crown and Rothiemurchus Estates, in particular, have good networks of off-road trails.

Mountain biking is carried out on the lowland and woodland paths and tracks identified in the Outdoor Access Section below. The WolfTrax facility developed at Strathmashie Forest near Laggan provides challenging blue, red and black routes for mountain bikers. Specialised trails have also recently been developed at Glenmore Lodge.

There are 89 accommodation providers in the Park signed up to the 'Cyclists' Welcome' Scheme, which ensures that visitors are provided with information on local cycle routes and repair shops, secure bike storage facilities, clothes drying areas, packed lunches, etc. In addition, there are 18 cycle hire businesses in the Park, 44% of which are situated in the Aviemore, Inverdrurie and Glenmore area (see **Table 4.5.3**).

Location	Name
Aviemore	Aviemore Mountain Bikes, Grampian Road
	Aviemore Spar Stores, Grampian Road
	Fat Treads, Grampian Road
	Pine Bank Chalets, Dalfaber Road
	Sporthaus, Grampian Road

Ballater	Cabin Fever, Station Square (delivers throughout Upper Deeside)
	Cycle Highlands, Bridge Street (delivers throughout Upper Deeside)
Braemar	Braemar Mountain Sports, Invercauld Road
Carrbridge	Ian Bishop Cycles
	Talisman Mountain Activities, Slochd Railway Cottages
Glenmore	Glenmore Mountain Bike Hire (delivers locally)
Glenshee	Cairdsport, Spittal of Glenshee (just outside Park boundary)
Grantown-on-Spey	Dial-a-Bike, Rhuarden Court
Loch Insh	Loch Insh Watersports
Laggan	Wolftrax, Strathmashie Forest
Rothiemurchus	Bothy Bikes, Ski Road
	Inverdrue Mountain Bikes, Rothiemurchus Visitor Centre
Tomintoul	Whisky Castle, Main Street

Source: Cairngorms National Park Outdoor Access Audit, October 2005

There are three cycling clubs within the Park and also a number of organisations who take an interest in cycling at a national level. The National Cycle Network is one of the most prominent, as it provides a comprehensive network of safe and attractive places to cycle and walk throughout the UK. In 2003 8,200 miles of National Routes were open, and it is hoped this will be extended to 10,000 miles by 2005. One third of the routes are traffic-free, the rest follow quiet lanes or traffic-calmed roads. The National Cycle Network is co-ordinated by Sustrans, in partnership with over 450 Local Authorities and other partners. Its objectives are to provide a high quality cycle route in every town, to encourage growth in cycling and walking for all types of trip and to be a catalyst for change in transport culture.

National Cycle Network Route 7 runs from Aviemore to Inverness and passes through the Park. A recent survey by Sustrans in 2003, which interviewed 119 people over a 48 hour period, indicated that the route was used by cyclists (35%) and pedestrians (61%). It showed that men (45%), women (35%) and children (20%) use the route, and that these trips were for recreation (75%), leisure (3%), utility (11%) and tourism (5%). Average recreational cycling trips were 23 kilometres, whereas utility trips averaged eight kilometres. Walking trips were much shorter, with utility trips averaging three kilometres and recreational trips averaging eight kilometres. The most popular reasons for using this route were convenience (69%), pleasant surroundings (59%) and safety (49%). Health and fitness were seen as other positive advantages, demonstrated by the fact that 5% of all trips were commuter trips, with a further 6% being other utility trips.

In addition to the many advertised walking and cycling routes which are available from estates and Local Authorities, organisations such as the Forestry Commission offer access to many of their forests. The Forestry Commission has 190 cycle trails in Great Britain, 84 of which are in Scotland. The Forestry Commission website (www.forestry.gov.uk) enables visitors to search for places to go and for cycling, walking, horse-riding, easy access and forest holidays. In relation to cycling the Forestry Commission promotes Bunzeach, Glenmore Forest, Inshriach Forest and Glen Doll as areas with cycle routes.

Mar Lodge Cycling

Mar Lodge Estate, the only National Trust for Scotland property in the Cairngorms National Park, has shown a keen interest in understanding the nature and extent of cycling on their

estate. To this end they have carried out two recent surveys in 2001 and 2004. The aim of the 2004 survey was to determine whether there has been any change in the level and pattern of use on the estate of visitors with bicycles compared to 2001. A secondary aim was to gain an insight into the opinions of visitors about the Trust's policy on cycling and recreational access to Mar Lodge. This study will endeavour to give a flavour of the findings for the first aim.

The majority of visitors to Mar Lodge Estate were single visitors in 2004, whereas parties of two had been the most popular number in 2002. Interestingly, the age group of cyclists visiting Mar Lodge Estate were older than average for the UK, with 73% being over 36 years old in 2004, compared with 59% in 2002. The surveys showed that the majority of cyclists came from the local area, that 39% of cyclists in 2004 visited the estate between one and three times a year and 32% visited more than three times a year, showing a high incidence of repeat visits. This would correspond to the findings of the Cairngorms National Park Visitor Survey of 2003, which showed a large number of repeat visitors.

The overwhelming purpose of cyclist visits to Mar Lodge Estate were to hillwalk using bike to assist, accounting for 73% of visitors in 2004 and 77% in 2002. Approximately 80% of respondents used a bicycle as an accompaniment to hillwalking or camping, rather than as a recreational activity. Only 14% of cyclists intended to cycle on low-level tracks.

The vast majority of cyclists used a map to plan their day, with the most popular being Ordnance Survey maps and The Scottish Mountaineering Council's Munros/Corbetts. There was a wide, reasonably even spread of destination, with Ben Macdui, the Devil's Point and Beinn Bhrotain/Monadh Mor being the top three destinations in 2004.

Reaction to the Trust's policy on cycling and recreational access to Mar Lodge were positive, with evidence suggesting that the majority of cyclists to the area agreed with the need to balance their enjoyment of wide-open spaces with sustainable protection of the environment.

3.5.4 Watersports

Water-based recreation is a popular activity carried out on rivers and lochs throughout the Park and includes sailing, swimming, diving, gorge-walking and all forms of paddling. Paddling, kayaking, boating and canoeing are interchangeable terms to describe the activity of propelling a boat on water without motorised assistance and using a paddle. Businesses offering water-based recreation opportunities are predominantly based in the Badenoch and Strathspey area, although one business is based in Strathdon, and many other businesses based outside the Park organise trips to the area. **Table 4.5.4** lists the main businesses based within the Park, but this list is not comprehensive and many more businesses, groups and projects from around the UK operate in the area.

Location	Name
Aviemore	Adventure Scotland
	Full on Adventure
	G2
	Highland Canoes
Glenmore	Badaguish Outdoor Centre
	Glenmore Lodge
	Loch Morlich Watersports Centre
Glen Isla	Highland Adventure Centre (just outwith the Park)
Grantown-on-Spey	Ardenbeg Outdoor Centre

	Craggan Outdoors
	Woolly Mammoth Activities
Kincraig	Lagganlia Centre
	Loch Insh Watersports Centre
Nethy Bridge	Abernethy Trust
Newtonmore	Active Outdoor Pursuits
Strathdon	Big Foot Adventruies

Source: Cairngorms National Park Outdoor Access Audit, October 2005

Canoeing and kayaking are particularly associated with the watersports centres at Loch Morlich and Loch Insh, where there are hiring and teaching facilities. In the past boat access has been restricted on lochs such as Loch Kinord due to environmental sensitivities, and access to Loch an Eilein has also been discouraged. The Rivers Spey, Dee and Avon and their tributaries also provide a wide range of kayaking opportunities.

The majority of sailing takes place at established locations such as Loch Insh and Loch Morlich. Loch Morlich Watersports supplies sailing equipment and instruction for individuals and organisations. Nethy Bridge Outdoor Centre co-funded and utilises the Sailing Club, which provides a centre for local sailors. Visitors to the Forest Enterprise camp-site also use their own dinghies, canoes and wind-surfing equipment on Loch Morlich.

Swimming in the rivers and lochs is popular for a fairly limited period in the warmer summer months. Snorkelling and scuba-diving are known to take place at locations around the Glen Tanar Estate, on the River Dee and at the Linn of Dee, as well as at Loch Morlich and Loch an Eilein.

3.5.5 Angling

Game angling is a popular activity in the Cairngorms National Park and principally takes the form of fly fishing (and some spinning) for salmon and sea trout in the rivers, fly fishing for wild brown trout in rivers and lochs and fly fishing for stocked fish such as rainbow, brown and brook trout in lochs and fisheries.

The available data from the Cairngorms National Park Visitor Survey and Marketing Strategy suggest that between 3% and 5% of visitors to the Park fish during their visit. Recent research for the Scottish Executive estimates that 62,100 rod days were taken on the Spey in 2003, with 56,800 on the Dee. Angling-related spend for the Spey was £11.3 million and for the Dee £10.2 million, with a significant proportion accruing within the Park. The area is best known for its salmon angling, which elicits the greatest interest and is of significant economic importance.

Salmon and Sea Trout

Salmon and sea trout fishing is generally let by the week, with parties of anglers taking a beat on a river with a given number of rods. Such angling is frequently managed in association with other fieldsport activities. Single rods or single days may also be booked, particularly on angling association waters. Fishing is let by a number of means, either with or without accommodation; these include directly from the estate or riparian owner, through a land or sporting agent, through hotels, tackle shops, angling associations and, increasingly, via the internet. Salmon numbers have been subject to decline on a number of rivers in recent times, and the rigorous efforts which are being made to arrest this decline currently appear to be showing some benefit.

The principal salmon and sea trout rivers with significant angling in the Park are listed below.

River Spey

The River Spey is one of the great salmon rivers and represented 11% of the total Scottish rod catch of salmon in 2002 (9% of UK catch). Spey salmon numbers have been relatively steady in comparison with the decline seen elsewhere, although there has been a shift in the season with less spring fish caught. The principal upper Spey beats include Tulchan, Castle Grant, Kinchurdy, the Strathspey Angling Association water, the Abernethy Angling Association water, Rothiemurchus water and Kincardine. Fishing is also available on the principal tributaries, eg the Avon and Feshie. The noted fishing author Bruce Sandison suggests that the Spey between Grantown-on-Spey and Aviemore offers the best day ticket salmon and sea trout fishing in Scotland.

River Dee

The Aberdeenshire Dee is another of the country's premium salmon waters, representing 6% of the total Scottish rod catch in 2002. Most prized as a noted spring fishery, the Dee was subject to a severe decline, but now appears to be recovering following the implementation of a catch and release policy. The upper Dee beats are Aboyne Castle, Craigendinnine, Waterside and Ferrar, Dinnet, Deecastle, Headinch and Cambus o' May, Monaltrie and Lower Invercauld. The principal tributaries for fishing are the Feugh Water and the Gairn and Clunie Burns. The latter two provide fishing for sea trout and brown trout only.

River Don

Better known for its brown trout fishing, the upper reaches of the River Don produce fewer salmon than the lower river below Alford. The river as a whole produced 4% of the 2002 Scottish rod catch. Castle Forbes and Kildrummy are the two major salmon beats on the upper river.

River North Esk

The river North Esk rises in upland Angus flowing through Glen Esk and reaching the sea at Montrose. The river produced 14% of the 2002 rod catch in Scotland and is a consistent performer. Fishable for migratory fish along its length, the upper reaches within the Park boundary lie on Invermark Estate and are not normally fished for salmon.

River South Esk

The river South Esk rises in Glen Clova in the Angus Glens. Although perhaps more noted as a sea trout water, it also has good runs of salmon. Consistently in the top five of UK sea trout rivers, the South Esk produced 9% of the 2002 Scottish salmon rod catch. Fishing in the Park is split between the Kirriemuir Angling Club, with seven miles, and the Clova Hotel in the upper part of the glen.

Trout

Wild brown trout fishing is available at many sites throughout the Park. The majority of this is in lochs, although there are notable river stretches, particularly on the Spey and Don. Lochs are split between those which are open to the public and others which are retained for private use (although there is some contention over access to these waters). Access to these fisheries is as for salmon and sea trout. While none of the public lochs are of any great significance as trout fisheries, Loch Vrotochan in Glenshee is noted for its altitude and productivity, Loch Insh by Alvie produces salmon and sea trout, as well as some large brown trout. A number of other lochs do hold large fish, and ferox trout are present in some of the deeper lochs such as Loch Lee. The most significant brown trout fishery in the Park area is the River Don, which is one of the best waters in the country. A number of the lochs do also hold the rare Arctic Char, which require very pure water and a narrow temperature range, eg Lochs Lee, Callater, Avon and Insh.

There is a small number of put and take fisheries in the Park near the larger population centres such as Aviemore, Grantown-on-Spey and Ballater.

Coarse fishing

Coarse fishing for species such as pike, perch, roach and eels, is a relatively new and undeveloped sport in Scotland. This type of fishing is concentrated in the Aviemore area, with seven locations listed on the Coarse Fishing in the Highlands website. Alvie Estate in particular is noted for pike angling, as is Loch Laggan and the River Spey between Laggan and Newtonmore.

3.5.6 Shooting and Sporting

Many of the estates within the Park and its adjacent area derive significant income from sporting activities, including pheasant and grouse shooting and deer stalking. Red and roe deer stalking is an important sporting activity which overlaps with the environmental management agenda, by aiming to protect the regeneration of native forest species, eg through grazing management. The Game Conservancy Trust estimates that there are at least 44 sporting estates in the Park, with two sporting interests or more operating as businesses. These estates are likely to employ full-time gamekeepers, stalkers or ghillies. There is a further group of estates with a smaller or single interest. The Game Conservancy Trust estimates that those holdings of over 1,000 acres (some 80-90% of the area of the Park) have some form of sporting interest. Shooting is let directly by estates, through land agents, specialist sporting agents and operators and through some accommodation providers. Substantial numbers of overseas visitors come from Europe to the area to shoot. Data on visitor numbers does not appear to be collated and is held by the individual operators.

3.5.7 Horse-riding

Horse-riding is an increasingly popular activity, with an estimated two million riders in the UK (Scottish Tourist Board 2001). In many cases horse riders use the same access routes as walkers and cyclists, particularly in the forests; however, the demand for horse-riding within the Park is not high. **Table 4.5.7** lists businesses within the Park which provide opportunities for horse-riding.

Location	Name
Aviemore	Aviemore Stables
Ballater	Balmenach Pony Trekking
Carrbridge	Carrbridge Trekking Centre
Crathie	Balmoral Estate Pony Trekking
Glen Tanar	Glen Tanar Equestrian Centre
Glenlivet	Shenval Farm Equestrian Centre
Glenprosen	Glenprosen Riding Centre
Kincraig	Alvie Stables
Laggan	Halflinger Pony Trekking Centre
Newtonmore	Croila Trekking Centre
Rothiemurchus	Strathspey Highland Pony Centre
Tomatin	Strathdearn Pony Trekking
Tomintoul	Tomintoul Riding Centre

Source: Cairngorms National Park Outdoor Access Audit, October 2005

There are no routes within the Park specifically promoted for horse-riding at present. However, the Forestry Commission have plans to implement a network of horse-riding trails adjacent to the mountain biking trails at Strathmashie Forest. In the meantime, there is

tremendous scope for horse riders to use quiet roads and routes such as forest and upland tracks.

3.5.8 Other Activities

A number of other outdoor access activities also take place across the Park, including dogsledding, fell and road-running, hang and para-gliding/scending, wildlife and bird-watching and photography.

3.5.9 Clubs

There are a number of sports clubs operating within the Park, with 84 different clubs representing 29 different interests and ranging from gun clubs to aqua aerobics clubs. **Appendix VR7** provides a full list of these clubs and the areas in which they can be found. The most numerous types of club are bowling and golf clubs, of which there are 10 of each within the Park. It is quite likely that there are other clubs in the Park, but these are the clubs known to the Sports Councils in each of the three Local Authority areas. Clubs mentioned in the report 'Community Development in the Cairngorms' have also been included.

3.5.10 Information Gaps – Recreational Activities and Networks

- Number of visitors brought to the Park by businesses based outside the Park;
- Links between demographic changes and the decline in skier numbers;
- Shooting and Sporting visitor numbers.

3.6 Visitor Facilities and Information Centres

3.6.1 Tourist Information Centres

Tourist Information Centres act as an important point of contact between the visitor and the organisations and agencies which have been charged with promoting the Park's activities and attractions.

In total there are nine Tourist Information Centres operating within the Park boundary. Of these three are open all year (Aviemore, Ballater and Braemar), four are open seasonally (Crathie, Grantown-on-Spey, Kingussie and Tomintoul) and two (Nethy Bridge and Newtonmore) are based in other accommodation (shop and post office respectively).

Tourist Information Centres on the periphery of the Park are also likely to give information and advice on the activities and attractions within the Park boundary, eg Tourist Information Centres in Pitlochry and Kirriemuir.

Information on the activities and attractions within the Park is also available at other venues such as accommodation outlets, visitor centres and ranger stations.

3.6.2 Commercial Promotion

Landmark Press produce and distribute tourist information brochures to approximately 330 businesses within the Cairngorms National Park boundary. Businesses in the Spey Valley area receive about 60% of these, with businesses on Deeside receiving about 24%, the Angus Glens about 13% and the Glenlivet area 3%. **Appendix VR8** shows the breakdown of delivery sites by type. Landmark Press also distribute Cairngorm tourist brochures throughout Scotland.

Tourist information is provided by many tourism businesses and attractions, eg Landmark, the Glenmore Visitor Centre, the Rothiemurchus Visitor Centre, the Folk Museum in Kingussie, the Pottery at Laggan, Newtonmore Information Point and Nethy Bridge Post Office, to name a but a few. A substantial proportion of accommodation providers, including almost all hotels and a large number of guest houses, provide visitor information leaflets.

3.6.3 Community Websites

There are a number of local websites which promote the Park, the culture and heritage of its communities and the activities which take place within its boundary. While there is no comprehensive catalogue of these, **Appendix VR9** provides a sample of those consulted in the conduct of this research.

3.6.4 Visitor Information

Only 25% of all visitors said that they had got information anywhere on their trip ‘today’, with the longer break group being the highest uptake group. Of the 25% who had received information, 58% stated it was from a Tourist Information Centre and 32% from an Orientation Centre/Visitor Centre. There seems to have been some confusion on the part of the visitor in differentiating between Tourist Information Centre and Orientation Centre, so it may be useful to merge these responses. People on longer breaks were the most likely to pick up information (65%), with the lowest uptake amongst day trippers (21%).

Information about the Park, however, was seen as being easy to access by 45% of respondents, which raises the question of where the information is sourced.

The Cairngorms National Park Visitor Survey recorded that 82% of visitors to the area had made no trips to a Tourist Information Centre during their stay; this peaked at 97% for day trippers. Only 17% intended to visit a Tourist Information Centre at all during their stay. The number of respondents to the Rothiemurchus and Glenmore Survey who had visited any Tourist Information Centre in the last 12 months was 31%. This figure indicates a greater use of Tourist Information Centres, but the questions referred to a much longer time period. There is no comparable question in the Highland Visitor Survey (Moray, Badenoch and Strathspey).

To try to put the statistics on uptake of visitor information into context, it may be helpful to look at frequency patterns for visits to the Cairngorms area. There are high numbers of people who seem to visit the Cairngorms area on a frequent basis, as overall 76% said that this was not their first trip to the area. By breaking this figure down further, it can be seen that overall 24% of those interviewed face-to-face had visited the area more than 20 times in the last five years, and that 14% of those on longer breaks had also visited more than 20 times in the last five years. This may reduce the need to visit Tourist Information Centres to get local information, but also provides a challenge for those marketing the area as to where they can effectively publicise new and existing products and services. This may suggest a need for a segmented approach, targeting the weaknesses and strengths, opportunities and needs of specific groups.

A possible explanation as to why the percentage of respondents to the Cairngorms National Park Visitor Survey who had visited a Tourist Information Centre was low is the large number of locations, other than official Tourist Information Centres, where tourists can obtain local information.

3.6.5 Information Gaps – Visitor Facilities and Information Centres

- How to effectively publicise new and existing products and services.

3.7 Outdoor Access

3.7.1 Outdoor Access Strategy Audit

The Land Reform (Scotland) Act 2003 ensures that everyone visiting the Park will have the right to access most land and water areas if they behave in a responsible manner, respecting the privacy, safety and livelihoods of others and causing no harm to the environment.

The Park Authority has a duty to uphold the right of outdoor access within the Park, to establish a network of core paths and a Local Access Forum and to promote the Code so that everyone in the Park is aware of their rights and responsibilities.

With membership drawn from key recreation and land management stakeholders (as well as other bodies with key roles in implementation of access legislation), the main function of the Local Access Forum is to advise the Cairngorms National Park Authority on all areas of access rights, rights of way and the formation and adoption of a Core Path Plan.

The work of gathering the relevant information in relation to the preparation of an Outdoor Access Strategy is ongoing. An Outdoor Access Audit has been completed, encompassing audits of supply, demand and policy and highlighting protected and promoted path networks, including rights of way. The Audit also provides information on access points to popular outdoor destinations, car parks, visitor information points, interpretation boards and picnic sites.

3.7.2 Promoted Paths

A number of path networks and long distance paths have been created within the Park. Some have been established for a long time and have rights of way status, while others, such as the Eastern Cairngorms Access Project, have been created more recently.

These paths are being promoted by landowners and managers, environmental organisations, access organisations such as the Highland Access Project, the Upper Deeside Access Trust and the Eastern Cairngorms Access Project (jointly managed by Upper Deeside Access Trust and Angus Council), Scotways, community-based initiatives and specialist walking websites and clubs, to name but a few.

Throughout the Park there is also a number of promoted long distance routes to suit all levels of ability. Popular examples include:

- The Speyside Way – runs from Aviemore to Buckie on the Moray coast via Ballindalloch and is the only formally designated Long Distance Route within the Park;
- The Badenoch Way – a 16 kilometre footpath from Dalraddy, past Kinraig and Insch, to Ruthven;
- Aviemore to Glenmore – cycle route (incomplete – requires planning permission);
- Eastern Cairngorms Access Project – ongoing project to repair, improve and create a network of footpaths and countryside furniture, as well as signage and information across the Eastern Cairngorms;

- The Dava Way – officially opened on 18 September 2005 and running from Forres, past the settlement of Dava, to Grantown-on-Spey;
- Glenmore Forest Park – waymarked path network, largely based on forest roads;
- Invercauld Estate – a 15 kilometre network of circular walks and cycle routes;
- Cambus o’ May – four circular trails, including an all mobilities trail;
- Glen Tanar – a range of circular woodland walks;
- Tarland – variety of waymarked paths;
- Ballater – over 90 kilometres of waymarked walks and cycle trails;
- Glen Muick – an 18 kilometre circuit of Loch Muick;
- Linn of Dee – several walks on Mar Lodge Estate and starting/finishing point for the Lairig Ghru;
- Nethy Bridge – a network of waymarked footpaths throughout Nethy Bridge and surrounding woodland.

A number of projects within the Park area are currently underway which will add to the network of promoted paths and long distance routes. These include:

- Bunzeath Forest, Strathdon;
- Ben Newe Forest Walks, Strathdon;
- Craig Leak, Invercauld Estate;
- Crathie, Invercauld Estate;
- Burn o’ Vat, Loch Kinord and Muir of Dinnet National Nature Reserve;
- The Deeside Way.

Promoted trails also exist as private business ventures at Loch Inch near Kinraig, the Landmark Centre at Carrbridge and at Glenmore Lodge.

(Further information on path networks is available from the numerous community websites which exist within the Park, eg www.boatofgarten.com, www.braemarscotland.co.uk, www.cairngormsonline.com and from specific interest websites such as www.walkingwild.com.)

3.7.3 Rights of Way

A right of way is a route to which the public have the right of access. In order to achieve right of way status, a route must meet certain criteria, in particular, the route must have been used by the public for a minimum of 20 years, it must connect two public places and it must follow a more or less defined route.

A record of all rights of way in Scotland is maintained by the Scottish Rights of Way and Access Society and was compiled in conjunction with Scottish Natural Heritage with the co-operation of Local Authorities. This record is known as the National Catalogue of Rights of Way or CROW and places rights of way into one of the following three categories:

- Vindicated – all routes declared legally to be rights of way, with evidence of continued usage;
- Asserted – all routes where the landowner accepts the rights of way status or where the Local Authority would take court action to protect the route, if necessary;
- Claimed – routes which meet the required criteria for right of way, but which have not been formally asserted or vindicated.

In Scotland there are over 7,500 rights of way recorded, 179 of which lie within the Park. Of the 7,500 rights of way in Scotland, the majority are claimed routes, with only 1% vindicated and 15% asserted. Within the Park 4% of the 179 registered rights of way are vindicated and 6% asserted. **Table 3.7.3** provides a breakdown of rights of way classifications for the Park area.

Table 3.7.3: Breakdown of Rights of Way Classifications within the Park						
Right of Way Classification	No. in Aberdeenshire	No. in Angus	No. in Highland	No. in Moray	No. in Park	% of all Rights of Way in Park
Vindicated	5	1	0	1	7	4%
Asserted	11	0	0	0	11	6%
Claimed	36	5	73	31	145	81%
Other Route	0	0	0	16	16	9%
Total No of Rights of Way	52	6	73	48	179	100%
% of all Rights of Way in Park	29%	3%	41%	27%	100%	

Source: Cairngorms National Park Outdoor Access Audit, October 2005

At present not all rights of way are signposted, although 15,000 signposts have been erected throughout Scotland, with 46 of the rights of way in the Park signposted. Of the 46 signposted rights of way within the Park, there are 7 vindicated, 1 asserted, 35 claimed and 3 other routes. Signposting is dependent on funding from public bodies.

Examples of well-known rights of way in the area include:

- Capel Mounth;
- Firmounth;
- Fungle;
- Glenmore to Abernethy via Ryvoan Pass;
- Glenmore to Pityoulish via the Sluggan;
- Jock's Road;
- Lairig Ghru;
- Lairig an Laoigh;
- Tomintoul to Dorback Lodge.

3.7.4 Transport

In common with much of rural Scotland, tourism in the Cairngorms National Park is highly car-dependent. Only 2% of respondents in the Cairngorms National Park Visitor Survey thought public transport was very good, and 74% said that it had not been applicable. This would correspond with the very high proportion of visitors (83%) who had travelled to the Park by private car. This compares with 87% of visitors in the Loch Lomond and The Trossachs National Park Visitor Survey who travelled to the Park by private car. In Scotland as a whole 65% of tourists from the UK travelled to Scotland by private car.

Once visitors are in the Park area there appears to be good car parking provision, which achieved the highest rating of very good and good (79%) of all the facilities investigated in the Cairngorms National Park Visitor Survey. There are 112 formal car parking areas within the Park and approximately 45 informal areas. A number of private estates and organisations charge for parking, using the money raised to improve car parking and toilet facilities, as well as developing and maintaining their access networks. Charging car parks are in place at the Keiloch on the Invercauld Estate (operated by the Upper Deeside Access Trust), at Crathie on the Balmoral Estate (operated by Aberdeenshire Council), at the Linn of Dee on the Mar Lodge Estate (owned and operated by The National Trust for Scotland), at Rothiemurchus Estate and at Glen Doll and Glenmore Forest Park (both owned and operated by the Forestry Commission).

The second most popular mode of transport was private bus/coach, which accounted for 8% of visitors to the Cairngorms National Park and 7% to Loch Lomond and The Trossachs National Park. Neither survey records a figure for visitors travelling to the Park by train.

The transport infrastructure within the Park is heavily dependent on trunk roads, particularly the A9. There are good train links in the north of the Park, with mainline trains stopping at Dalwhinnie, Newtonmore, Kingussie, Aviemore and Carrbridge on their way to Inverness. It is different in the south and east of the Park, where Aberdeen provides the nearest rail link to the Braemar and Ballater area.

The bus links to the Park are again stronger in the north of the Park, with regular services on the A9 to and from major UK cities, passing through Glasgow, Edinburgh and Perth. In the south and east of the Park there are good links between major UK cities and Aberdeen. From there more local buses are the means of transport into the Park.

As part of a sustainable transport initiative, the Cairngorms National Park Authority has helped to promote a new bus link for locals and tourists within the Park in the Glenmore area. This was operated as a pilot scheme during the summer of 2004 and continues to run from Dalfaber to Cairn Gorm Mountain via Aviemore Railway Station, with a regular hourly frequency Mondays to Saturdays throughout the year.

Postbuses are another important form of transport within rural Britain. Postbus routes operating in the Cairngorms area include Ballater to Glenshee, Dalwhinnie to Drumochter, Kirriemuir to Glen Prosen and Kirriemuir to Glen Clova. These routes are detailed on the Royal Mail website at www.royalmail.com.

There are several community car and transport schemes operating within the area. The Angus Transport Forum is a leader in Demand Responsive Transport, offering an example of what can be achieved when all public transportation is co-ordinated.

As a priority the Cairngorms National Park Authority aims to increase public transport and cycle use within the Park, and there are various initiatives to improve cycle carriage on buses in and around the Park. Cycle carriage is available on several routes out of Aberdeen to Peterhead and Inverness. There are practical issues relating to bus type and fitting racks and trailers onto buses, but some buses carry cycles in holds. Scottish Citylink carries only

folding cycles in cases, but The Highlands and Islands Strategic Transport Partnership (HITRANS) is working on a bikes in plastic bags scheme for buses. Trains accept two cycles on the Glasgow/Edinburgh to Inverness route, but this has to be booked in advance.

The Cairngorms National Park Authority's integrated timetable and cycle/walks brochure (May 2005) combines local transport information and suggested routes for cyclists and walkers travelling to the Park from major cities.

The nearest air links are at Inverness and Aberdeen airports, which are both within one hour's drive of the Park.

3.7.5 Outdoor Access Events

The Cairngorms National Park provides a backdrop for many types of event. These can include competitive sporting competitions such as mountain biking, skiing telemarking, fell-running and orienteering, but also charity fund-raising events involving mass-participation walks. There are also a number of competitive hill races across the Park, some of which are connected to Highland Games.

A number of walking festivals take place across the Cairngorms from May to October and are publicised in a single leaflet for the whole of the Park.

The Aviemore Walking Festival runs for one week during May in Badenoch and Strathspey, with 10 different guided walks available each day graded from easy to strenuous. The festival is in its third year, and walks are led by the various ranger services and other outdoor leaders. The Spirit of Speyside Walking Festival takes place in August and is now in its fourth year. It offers around 20 walks over five days for a range of abilities.

The Ballater Royal Deeside Walking Week has run every May since 1998 in Deeside and offers three walks of different grades each day. The Active Aboyne Outdoor Festival takes place in July and offers a range of walks for different abilities.

The Angus Glens Walking Festival has been running for three years and takes place over four days each June. The Blairgowrie and East Perthshire Walking Festival, now in its second year, takes place over six days from the end of September/beginning of October and offers a range of activities from low-level walks to more challenging routes.

3.7.6 Information Gaps – Outdoor Access

- Visitor numbers travelling to the Park by train.

3.8 Access for All

The Cairngorms National Park Authority has taken the issue of Access for All very seriously. Following the Disability Discrimination Act in 1995, the Cairngorms Partnership initiated wide-ranging discussions with local and national bodies concerned with disabled access. In June 2001 The Cairngorms Partnership commissioned Reforesting Scotland's 'Woods for All' project to undertake a piece of work resulting in the All Abilities Access Survey.

3.8.1 All Abilities Access Survey

The survey looked at 15 specific sites in detail, 12 of which are within the Park boundary. The main findings of this survey were as follows:

Parking

The quality of parking spaces was important for disabled visitors. The key requirements were that there should be specific spaces for disabled drivers in small and/or busy car parks. These spaces needed to be long and wide, with an even surface, where possible.

Buildings and Amenities

Toilets and sheltered seating were very important to visitors, and although there was a relatively high number of disabled toilets, poor access to them reduced their value. It was suggested that improvements should be made to the design of, for example, picnic tables to allow disabled visitors and their carers to use them.

Signage and Information

Most of the sites used waymarking posts and corresponding leaflets, which seemed in the main effective. However, concerns were raised over complicated and non-user-friendly leaflets. There were also issues over faint or complicated presentation of text and graphics on interpretation boards. One popular suggestion was tactile waymarking symbols, or possibly even tactile maps. Rangers for guided walks were seen as a valuable resource.

Paths and Access

It was noted during the survey that there was a large difference in the quality and accessibility of paths, due in part to the nature of the terrain, the visitor demand, historic and aesthetic issues and the stage of development of the site. It was suggested that there were a number of improvements that could be made, eg gate type and width. It was noted that every effort should be made to improve access, while ensuring the safety of all visitors.

The Cairngorms National Park Authority has subsequently set up an All Abilities Communication Network which “will work to ensure access for all abilities becomes integrated into thinking across the Park by all organisations. It will also work to ensure that recreational facilities and in particular paths provide for the needs of people of all abilities.” The All Abilities Communication Network is a semi-autonomous group which will act in an advisory capacity to the Cairngorms National Park Authority Board and its staff. Membership of this group is open to organisations and individuals representing people with disabilities.

Table 3.8.1 provides details of outdoor access sites promoted as suitable for people of all abilities or where specific provision is made.

Table 3.8.1: Outdoor Access Sites promoted as suitable for people of all abilities or where specific provision is made within the Park			
Location	Name	Managed by	Description of Facility or Provision
Aviemore	Independent walks around Aviemore	The Highland Council	Route: 4 promoted routes total of 9.4 kilometres in length, predominantly on paved footpaths/pavements in and around the settlement Facilities: In Aviemore
Boat of Garten	Auchguorish Gardens	Private Enterprise	Route: The trails are part of the botanic garden and are moderate to steep in gradient, making them suitable for powered chairs and scooters only Facilities: Parking on level surface

Table 3.8.1: Outdoor Access Sites promoted as suitable for people of all abilities or where specific provision is made within the Park			
Location	Name	Managed by	Description of Facility or Provision
	Boat of Garten Community Garden	Community	Route: Community Garden with smooth, gently-sloping pathway Facilities: Parking on tarmac, nearest disabled toilets 150 metres, handrails, seating and resting spaces for wheelchairs
	Milton Loch Walk	Community	Route: 455 metre path loop to Milton Loch on flat surface Facilities: In Boat of Garten
	National Cycle Route 7	Sustrans	Route: 2.4 kilometers of multi-user route to Kinveachie on tarred surface with some moderate and sustained gradients Facilities: In Boat of Garten
Cairngorm	Aonach Trail	Cairngorm Mountain	Route: 400 metres suitable for wheelchair use (mountain garden also accessible, but steep) Facilities: Parking on firm surface, disabled toilets at visitor centre, interpretation, waymarking, handrail and benches
Cambus o' May	All Access Path – West Lochan	Forestry Commission	Route: 360 metres forest trail with compacted earth surface, some steeper areas, but with level sections also Facilities: Parking on firm ground, disabled toilets at car park (under/due to be constructed), benches, perch posts and waymarking
	All Access Path – East Lochan	Forestry Commission	Route: 260 metres forest trail with compacted earth surface, some steeper areas, but with level sections also Facilities: Parking on firm ground, disabled toilets at car park (under/due to be constructed), benches, perch posts and waymarking
Carrbridge	Landmark	Private Enterprise	Route: 1.1 kilometres of forest and nature trails on a level compacted grit and boardwalk surface Facilities: Parking on firm surface, disabled toilets in visitor centre, interpretation and seating available

Table 3.8.1: Outdoor Access Sites promoted as suitable for people of all abilities or where specific provision is made within the Park			
Location	Name	Managed by	Description of Facility or Provision
Glen Clova	Trout Loch Walk	Angus Council	Route: 2 kilometres on smooth grit surface with resting points on the gradients Facilities: Parking on firm ground at hotel, public toilets 2 miles at Glen Doll (disabled toilets at hotel for patrons)
Glenmore	Allt Mor Forest Trail, Glenmore	Forestry Commission	Route: 400 metres forest trail designed for wheelchair use Facilities: Disabled spaces available, nearest disabled toilets 800 metres, interpretive panels
	Lochside Trail, Loch Morlich	Forestry Commission	Route: 1.6 kilometre circular loch-side Trail graded and surfaced for wheelchair use Facilities: Parking on firm grit, nearest disabled toilets 200 metres, waymarking
Kingussie	Glebe Ponds and Nature Walk	The Highland Council	Route: 500 metre nature walk on level and sometimes gentle gradients, compacted grit surface with boardwalks in places suitable for wheelchairs. Facilities: Parking in lay-by, nearest disabled toilets 1.6 kilometres, picnic tables and seats provided
	Kingussie Public Gardens	The Highland Council	Route: Community Garden with smooth, wide paths designed for wheelchairs Facilities: Parking behind hotel, nearest disabled toilets 250 metres
	National Cycle Route 7 (as in Newtonmore)	Sustrans	Route: 4.8 kilometres of multi-user route to Kingussie on tarred surface, with gentle, downward gradient heading north Facilities: In Newtonmore and Kingussie
Nethy Bridge	Nethy Bridge Riverside Trail	Explore Abernethy	Route: 1 kilometre (return same way) of the Riverside Walk on gentle gradient and firm grit surface Facilities: Designated parking on tarmac, disabled toilets at community centre opposite, regular rest points
Newtonmore	Highland Folk Museum	Private Enterprise	Route: The trails are part of this outdoor museum, linking exhibits and covering fairly level ground on a compacted surface Facilities: In Museum and Newtonmore

Table 3.8.1: Outdoor Access Sites promoted as suitable for people of all abilities or where specific provision is made within the Park			
Location	Name	Managed by	Description of Facility or Provision
	Jack Richmond Memorial Woodland	Newtonmore Community Woodland and Development Trust	Route: A 360 metre section of the Newtonmore Wildcat Trail with a compacted grit surface and suitable for wheelchair use Facilities: Parking on tarmac, nearest disabled toilets 1.6 kilometres, picnic tables provided
	National Cycle Route 7 (as in Kingussie)	Sustrans	Route: 4.8 kilometres of multi-user route to Kingussie on tarred surface, gentle, downward gradient heading north Facilities: In Newtonmore and Kingussie
Rothie-murchus	Loch an Eilein Forest Trail (section of)	Rothie-murchus Estate	Route: A 200 metre section of the Loch an Eilein Forest Trail, level path with firm surface from visitor centre to loch shore Facilities: Designated disabled parking on firm ground, disabled toilets at visitor centre
Tomintoul	Tomintoul all abilities access trail at visitor centre and estate office	Glenlivet Crown Estate	Route: A 500 metre loop through a wooded area, level with some gentle gradients on a compacted grit surface Facilities: Designated disabled parking on firm ground, disabled toilets at visitor centre, benches, information and waymarking

Source: Cairngorms National Park Authority Outdoor Access Audit, October 2005

The Charity ‘Sport Any Way’ operates from Braemar and offers various outdoor activities (skiing, cycling, archery, grass-sledging, hillwalking, bowling and orienteering) for people who have a physical or mental disability or sensory impairment. The charity has also recently been granted planning permission to build a dry ski slope in Braemar. Disability Snowsport UK (formerly The Uphill Ski Club), based in Glenmore, also provides a range of snowsports for people of varying abilities.

The Badaguish Outdoor Centre near Glenmore provides opportunities for people of all abilities to experience a range of activities, including mountain biking, rock climbing, abseiling, hillwalking and orienteering. Crathie Opportunity Holidays based on Deeside offers accommodation suitable for wheelchair users to stay in unassisted. An all abilities trail at Crathie adjacent to this site is due to open soon.

3.8.2 Information Gaps – Access for All

- How to improve access, while ensuring the safety of all visitors.

3.9 Ranger Services

The provision of ranger services throughout the Park is complex and is affected by a wide range of issues.

While there is no standard definition of what constitutes a ranger service within the Cairngorms National Park, it has been established that there are 13 organisations employing 26.5 full-time equivalent rangers or staff who carry out activities normally associated with rangers. These are:

Angus Glens Ranger Service;
 Aberdeenshire Council Ranger Service;
 The Highland Council Ranger Service;
 Speyside Way Ranger Service;
 Forestry Commission Scotland Ranger Service;
 The National Trust for Scotland (Mar Lodge Estate) Ranger Service;
 Balmoral Estate Ranger Service;
 Invercauld Estate Ranger Service;
 Glen Tanar Ranger Service;
 Glenlivet Estate Ranger Service;
 Explore Abernethy Ranger Service;
 Rothiemurchus Estate Ranger Service;
 Highlands and Islands Enterprise (Cairngorm Estate) Ranger Service.

In addition The Royal Society for the Protection of Birds provides similar services to other ranger services, but does not call itself a ranger service.

There are, however, differences in the make-up of each of these organisations and, in particular, differences in the remit of the staff involved. The mechanisms that exist to fund staff and the statutory roles and responsibilities of each of the organisations are complex, their lack of uniformity making the co-ordination of ranger services less than straightforward.

Table 3.9 details the area of operation and funding sources for each of the ranger services operating within the Park.

Table 3.9: Area of Operation and Funding Sources for Ranger Services operating within the Park			
Ranger Service	Area of Operation	Funding	Scottish Natural Heritage Discretionary Ranger Grant
Angus Glens	Angus Council	Angus Council Forestry Commission Scotland European (until 2005)	Yes
Aberdeenshire Council	Aberdeenshire Council	Aberdeenshire Council	Yes
The Highland Council	The Highland Council	The Highland Council	Yes
Speyside Way	Speyside Way	Moray Council	Yes
Forestry Commission Scotland	Forestry Commission Scotland Land	Forestry Commission Scotland	No
The National Trust for Scotland (Mar Lodge	Mar Lodge Estate	The National Trust for Scotland	Yes (part of the national agreement between The

Estate)			National Trust for Scotland and Scottish Natural Heritage)
Balmoral Estate	Balmoral Estate	Balmoral Estate	Yes
Invercauld Estate	Invercauld Estate	Invercauld Estate	No
Glen Tanar	Glen Tanar Estate	Glen Tanar Charitable Estate	Yes
Glenlivet Estate	Glenlivet Estate	Crown Estates	Yes
Explore Abernethy	Nethy Bridge	Explore Abernethy Community Group	No
Rothiemurchus Estate	Rothiemurchus Estate	Rothiemurchus Estate	Yes (Scottish Natural Heritage grant aid is for agreed outputs, many of which are delivered by the ranger service)
Highlands and Islands Enterprise	Cairngorm Estate	Highlands and Islands Enterprise	No

Source: Cairngorms National Park Authority, 2005

Geographical Coverage of Ranger Services in the Park

The geographical coverage of Ranger Services within the Park can be summarised using three categories (as identified by Cairngorms National Park Authority 2004):

- Site-based Ranger Services: 9 of the services work over a defined geographic area corresponding to one land management/ownership unit, usually an estate boundary (eg Glen Tanar or Cairngorm Ranger Service).
- Area-wide Ranger Services: 3 services operate across a wider area, often corresponding to a Local Authority area. In Aberdeenshire and The Highland Council areas these services manage particular sites within their area, but also cover the intervening ground in some way. They also manage an area outwith the Park. The Angus Glens Ranger Service is largely devoted to a relatively small area at the head of Glen Doll/Clova and carries out particular duties on Caenlochan National Nature Reserve and the Glen Doll Forestry Estate.
- Community-based Ranger Services: only 1 of the services (Explore Abernethy Ranger Service) operates at community level, focusing on cultural heritage, and promotion and maintenance of local path networks.

Although covering a wide range of activities, the primary function of most of the site-based ranger services is to provide visitors with a positive experience. This includes many of the following activities:

- Management planning for visitors;
- Operating a visitor centre with interpretation;
- Managing car park(s);
- Organising path maintenance;
- Path promotion – eg leaflets, waymarking;
- Site maintenance – eg maintenance of countryside furniture, litter clearance;
- Liaising with visitors – eg access, safety;

- Promoting safe and responsible access – leaflets, signs, car park checks;
- Liaising with other estate employees;
- Providing/leading guided walks and talks;
- Protecting the resource from damage by visitors;
- Developing good facilities for disabled users.

Of the three area-wide ranger services, Highland and Aberdeenshire Councils work most closely with communities on a wide variety of environmental and cultural heritage projects. There are a number of visitor centres throughout the Park which have a significant Ranger Service input. The level of involvement at these sites is, however, extremely variable across the Park.

- Rothiemurchus at Loch an Eilein;
- Forestry Commission Scotland at Glenmore Forest;
- Highlands and Islands Enterprise at Cairngorm;
- Explore Abernethy at Nethy Bridge;
- Glenlivet at Tomintoul;
- Glen Tanar at Braeloine;
- Balmoral at Glen Muick.

In addition, Angus Council have a ranger base at Braedownie and Moray Council opened the Speyside Visitor Centre at Aberlour (outside the Park) in June 2005.

The Cairngorms National Park Visitor Survey indicates that 26% of visitors to the Park had visited a ranger base at some point during their visit. When interviewing visitors staying five nights or longer, this figure increases to 32%, but dropped to 13% when day trippers were interviewed.

Most of the ranger services produce visitor information in some form for the particular site or area that they manage. Some of the ranger services contribute to and benefit from websites associated with the particular site or area, but few have their own website. Many of the ranger services provide a programme of guided walks as part of an interpretative programme. These, in turn, are collated and published annually by the Cairngorms National Park Authority in ‘Cairngorm Countryside Events’.

3.9.1 Information Gaps – Ranger Services

- No information gaps identified.

3.10 Information and Interpretation

Education for Sustainable Development is an initiative to develop “opportunities for local people, businesses, organisations and visitors to develop the knowledge, understanding, skills and confidence which they need to contribute to a sustainable future for the area” (‘Learning for a Sustainable Future’, Cairngorms Partnership 2000).

There are a number of strategies and initiatives that are specifically relevant to visitors to the Cairngorms area. However, the ethos of sustainable development is that it should permeate everything that is done.

The Cairngorms National Park Authority’s Strategy and Action Plan for Sustainable Tourism is a broad-ranging study that encompasses the need to encouraging tourism in the Cairngorms area, while reinforcing the responsibility of all the stakeholders involved to maintain the reasons why people come to the area, ie the natural environment, the peace and tranquillity and the wide open spaces.

Other initiatives include a Green Tourism Business Scheme, part of the Quality Assurance Scheme run by VisitScotland which helps member tourism businesses to meet their business objectives through cost savings associated with environmental improvements and meeting visitor expectations.

As part of its Interpretive Framework, the Cairngorms National Park Authority has identified the need to undertake an audit of all interpretive facilities across the Park. In 1999 the Highland Interpretive Strategy undertook an audit of interpretive facilities, including built items, structures and buildings, but excluding leaflets, books and websites. The audit identified 154 facilities in the Badenoch and Strathspey area of the Park. There is no comparable information available for the rest of the Park.

The recent Cairngorms National Park Authority's Outdoor Access Audit compiled data on waymarking, leaflets and notice boards providing information about promoted paths.

The Cairngorms National Park Authority currently produces with partners a number of Park-wide publications providing information for visitors. These include:

- Visitor Guide;
- Cairngorms Countryside Events;
- Integrated timetable;
- Gaelic Place Names (in production for publication end March 2006);
- Walking Festivals Leaflet.

At Explore Abernethy there has been a community initiative to improve the understanding between land managers and recreational users of the area, while The Crown Estate at Glenlivet has developed a range of interpretive materials.

The Mountaineering Council of Scotland has developed a small leaflet entitled 'Where to Go', which aims to give walkers and other users of the Scottish countryside an awareness of their potential impact on the environment and to inform them of ways to reduce the environmental damage caused by human sanitation. Scotways has also produced a leaflet on hill tracks within the Park.

There are nine Outdoor Education Centres throughout the Cairngorms National Park which provide a wide range of outdoor activities for individuals and organised groups. There is a full list of the activities on offer in **Appendix VR6**.

Ranger services provide guided walks and are very often the local point of contact able to offer advice and information to visitors when they are exploring the countryside. There are also a number of organisations specifically involved in the sustainable education elements of recreational and leisure activities. They include The Highland Council, the Forestry Commission, Forest Enterprise, the National Farmers' Union, Scottish Natural Heritage, The Royal Society for the Protection of Birds, The National Trust for Scotland, Highlands and Islands Enterprise and The Mountaineering Council of Scotland. These organisations provide an educational and information service through their presence at agricultural shows, by running or helping to fund visitor centres and by providing interpretation boards, signage and visitor guides. Rothiemurchus Estate is also involved and provides ranger service guided walks, information on flora and fauna, visitor guides, displays, code of conduct for anglers, a mountain bike leaflet and map, familiarisation for local tourism businesses and pathfinder packs.

3.10.1 Information Gaps – Information and Interpretation

- Audit of all interpretive facilities across the Park.