



# Cairngorms National Park Authority

## Visitor Survey 2024-25 Findings Report

May 2025

# Research Background

- ◇ The Cairngorms National Park (the 'National Park') is the UK's largest national park at 4,528km<sup>2</sup> (6% of Scotland's land mass) and is home to one quarter of the UK's rare and endangered species. Around two million visitors from across the world come to this special place every year.
- ◇ The National Park Authority is the organisation that was set up to ensure that the unique aspects of the Cairngorms – the natural environment of the National Park, its wildlife, and its people – are looked after, both now and in the future. The National Park Authority provides leadership to all those involved in the Cairngorms.
- ◇ The Cairngorms National Park Authority commissioned M·E·L Research to conduct a survey with its visitors across the National Park in 2024-2025. This survey, is intended to establish a baseline of visitor sentiment and experience across the National Park throughout the year. This report displays the results of this survey.

# Research Objectives



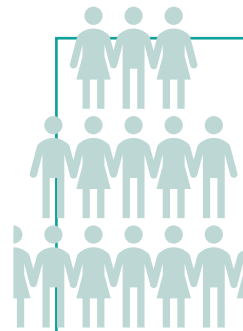
Monitor changes in visitor profile over time, and against the National Park Plan's strategic objectives



Understand visitor experiences of organising accommodation, travel and experiences, and any barriers they face in these

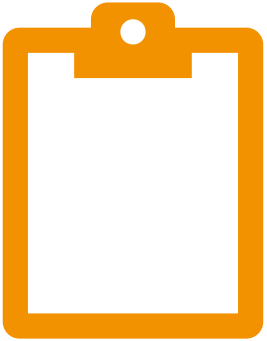


Provide insight into satisfaction levels among visitors, and any changes in these compared to previous years



Identify variations in the visitor experience among different visitor subgroups

# Methodology



## Survey Delivery:

The research was conducted by M·E·L Research's face to face interviewing team, using a systematic sampling approach. Surveys were conducted across the year, in all months between May 2024 and April 2025, and on all days of the week. Interviewers were stationed at a range of 35 sites and locations across the National Park. 1,348 interviews were collected by these interviewers, and these results are used as the primary source of data in this report.

In addition to this, as a trial 1,008 responses were collected via an online survey distributed by the Cairngorms Business Partnership. In part due to the self-selecting nature of this sample, the profile of responses differed greatly from that of the face to face sample. This data has not been included in this report due to concerns about the representativeness of the online sample.



## Results reporting:

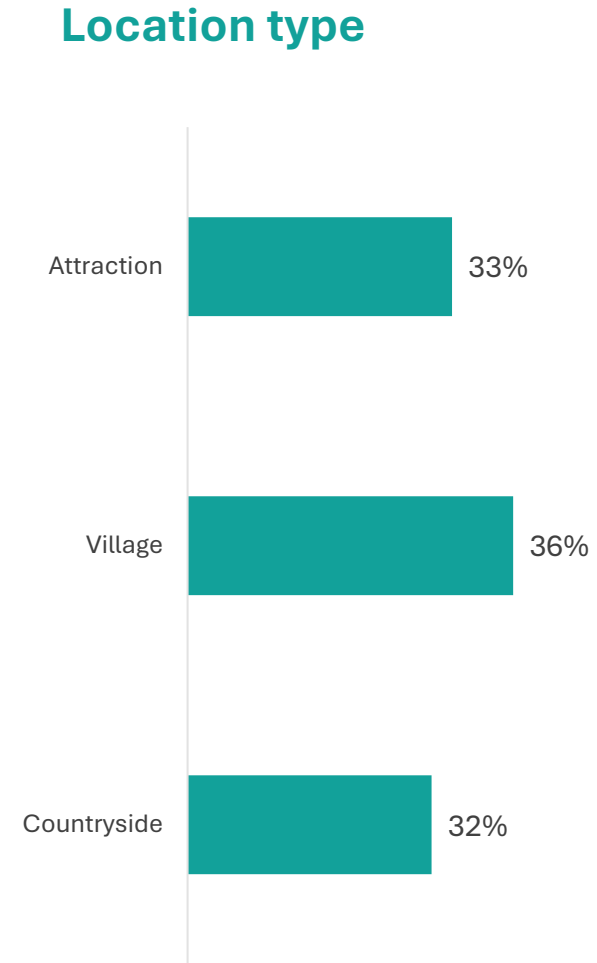
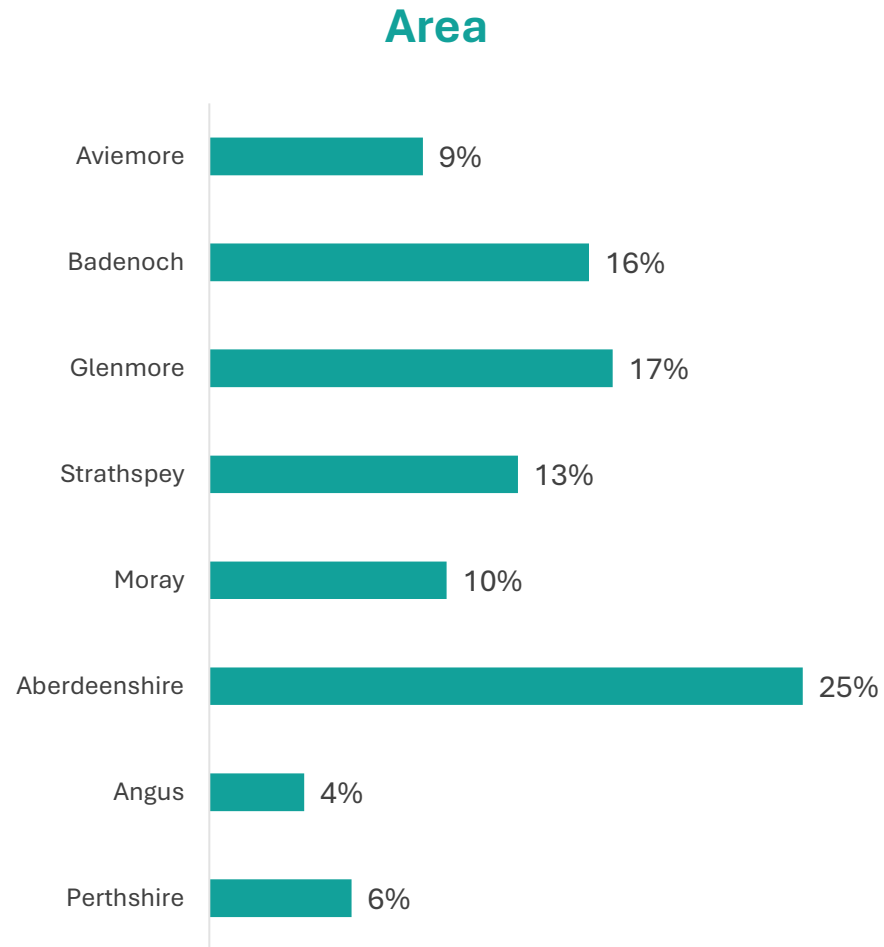
This report includes data collected between the 1<sup>st</sup> May 2024 and 30<sup>th</sup> April 2025.

The 1,348 responses collected by face-to-face interviewers have a margin of error of +/- 2.67 at the 95% confidence level. This means that for a statistic of 50%, we can be 95% confident that the true statistic is between 47.23% and 52.67%. However, it is of note that the margin of error is higher for questions with a lower response rate.

# Sample details



# Proportion of face-to-face interviews collected, by Area (grouped from individual locations)



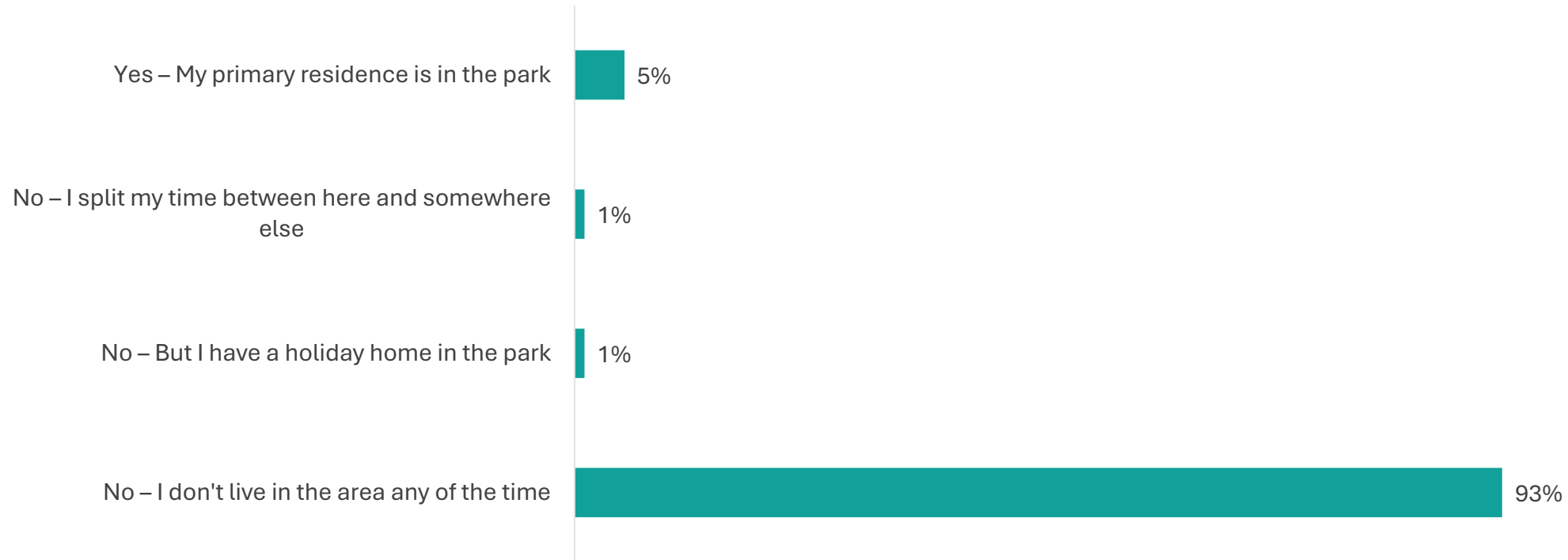
Unweighted sample base size: 1348

# Visitor Profile



# The vast majority (94%) of those interviewed were visitors who live outside of the Cairngorms National Park or have a holiday home within it

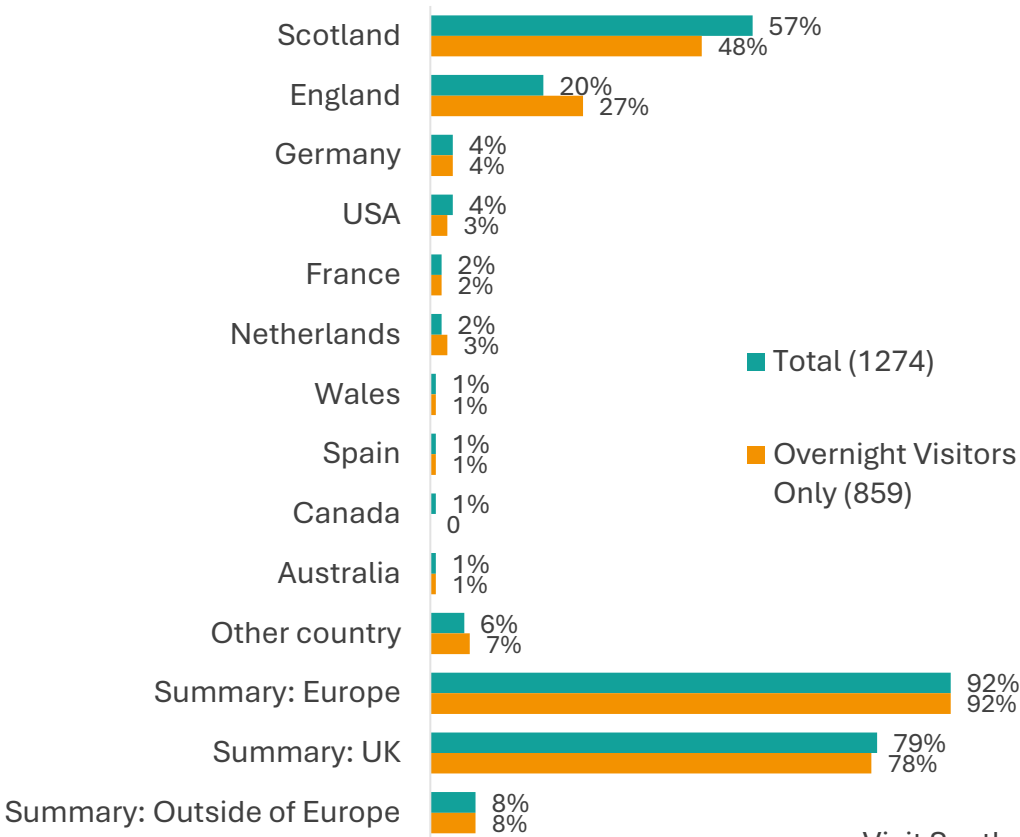
In 2019-20 97%, and in 2014-2015, 96% of those interviewed were visitors from outside of the National Park, and in 2009-2010, 77% were from outside of the National Park.



# The vast majority (92%) of overnight visitors come from within Europe (including the UK)

This includes approximately half (48%) of overnight visitors to the National Park who visit from Scotland, and the 79% from the UK (inclusive of Scotland). For the purposes of this report, visitors have been grouped into four geographical areas for analysis, displayed in the table on the right: Scotland (any visitors from Scotland), Rest of UK (visitors from the UK, excluding Scotland, unless specified otherwise), Europe (visitors from Europe, excluding the UK, unless specified otherwise), Rest of World (visitors from outside of Europe). These terms will be used in this way throughout the report.

The country both day and overnight visitors were from was largely consistent across all seasons, except that in winter, the proportion from England rose to 31%.



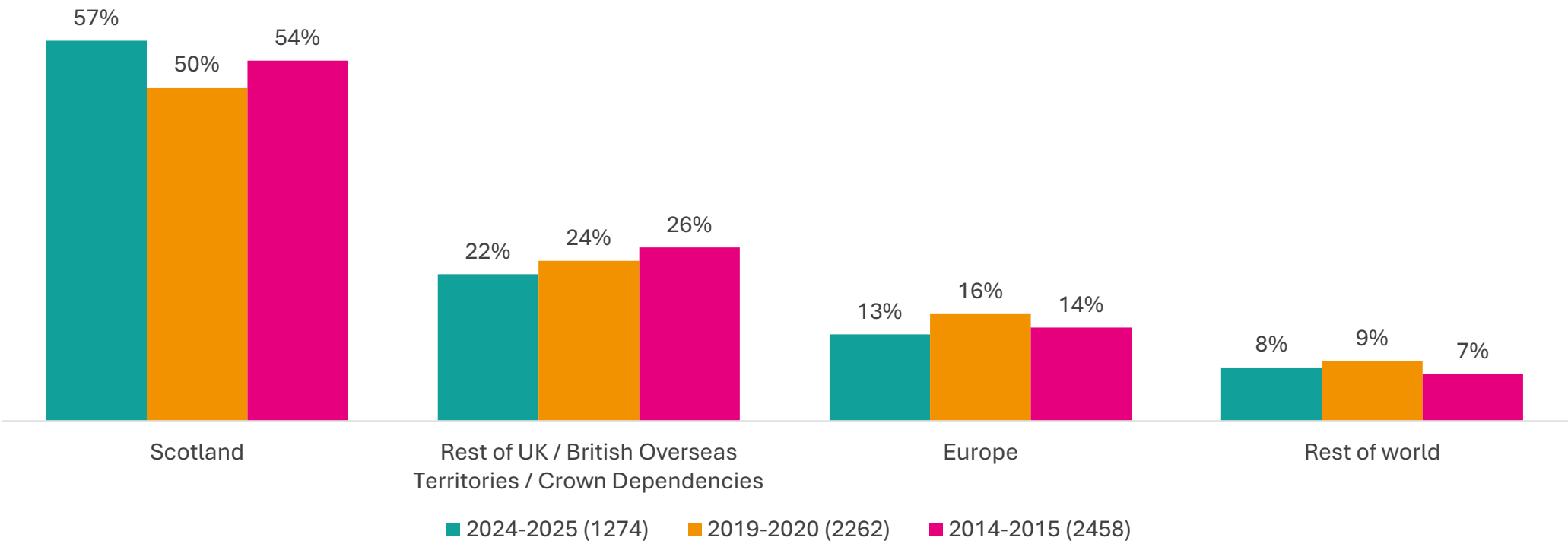
Overnight Visitors Only	Cairngorms Visitor Survey 2024-25	Scotland visitors 2023 (Visit Scotland)
Scotland	48%	27%
Rest of UK	29%	45%
Rest of Europe	15%	12%
Rest of world	8%	16%

Overnight visitor = any number of nights

# Visitors were more likely to be from Scotland than in previous years

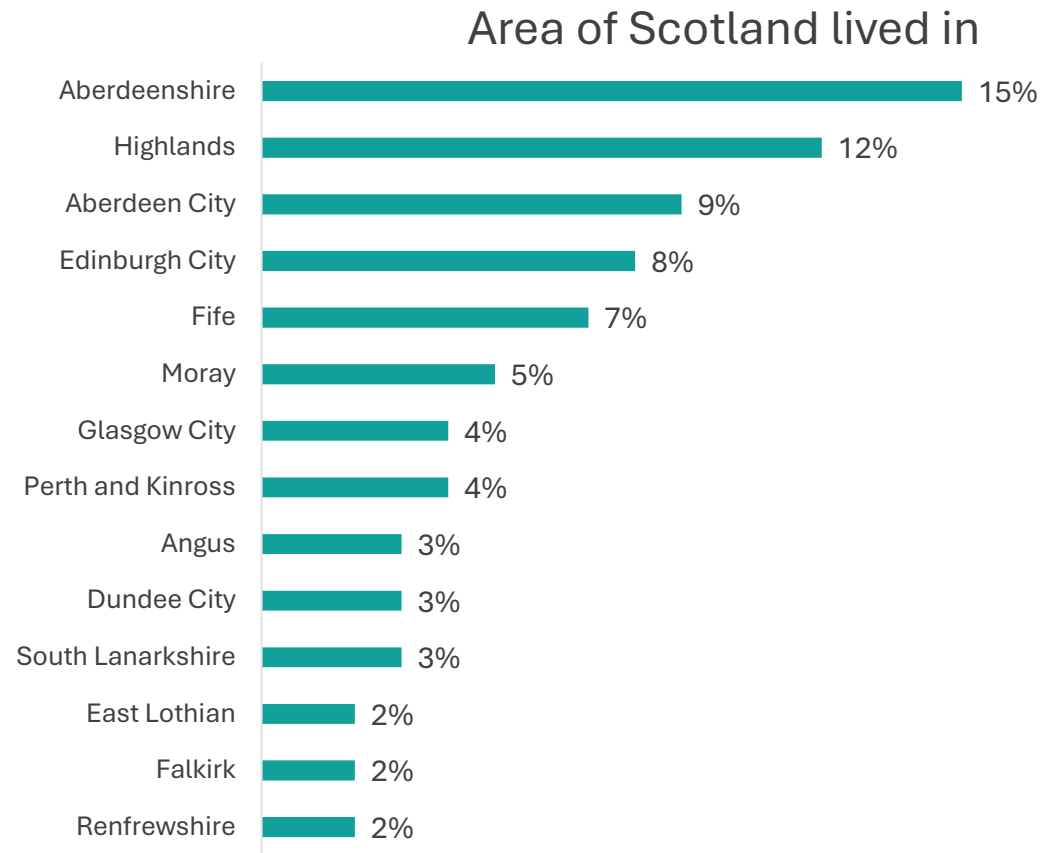
Nonetheless, the greatest proportion of visitors had travelled from within Scotland in both 2024-2025 and 2019-2020, with the rest of the UK being the second most common source of visitors to the Cairngorms National Park.

Visitor origin yearly trend



# Visitors most commonly came from Aberdeen/Aberdeenshire or the Highlands

While 36% visited from Aberdeenshire, the Highlands or Aberdeen City, 8% were from Edinburgh, 7% from Fife and 4% from Glasgow.



Throughout this report, each season has been categorised as follows:

**Spring:** March – May  
**Summer:** June – August  
**Autumn:** September – November  
**Winter:** December – February

Spring Visitors more likely to visit from:  
Renfrewshire (4%)  
East Dunbartonshire (2%)  
West Dunbartonshire (2%)

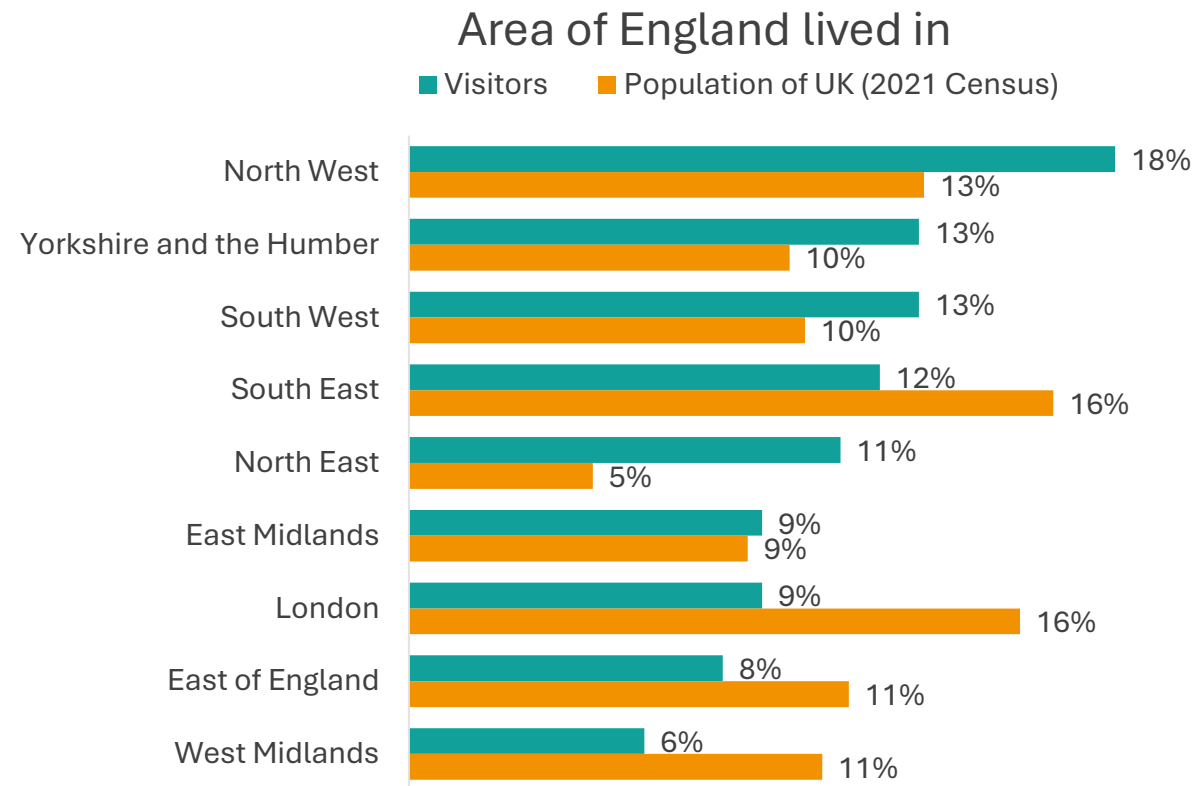
Autumn Visitors more likely to visit from:  
Glasgow City (8%)  
South Ayrshire (3%)

Summer Visitors more likely to visit from:  
Angus (6%)

Winter Visitors more likely to visit from:  
Fife (11%)

# Whilst four in ten (41%) visitors from England came from the North, many came from further afield, including 13% from the South West

This demonstrates the appeal of the Cairngorms National Park, with people travelling from across England to enjoy everything the area has to offer. Compared to the relative populations of each region, visitors were more likely to come from the North West, Yorkshire and the Humber, the South West and the North East.



## By Season:

Those who visited in Spring were significantly more likely to be from the North West (30%) than in other seasons. In Winter, visitors were more likely to be from London (18%) than in other seasons.

## By method of transport

Visitors from the North West were significantly more likely to have travelled by motorhome or campervan (23%) than visitors from other areas of England

## By age

Among visitors from the UK, those who were 35-44 years old were particularly likely to be from the South West (23%) or London (17%), more so than visitors of other ages.

## By NRS Social Grade

Among visitors from the UK, those in NRS social grade A were most likely to be from London (16%).

# The Cairngorms National Park attracts both new and returning visitors

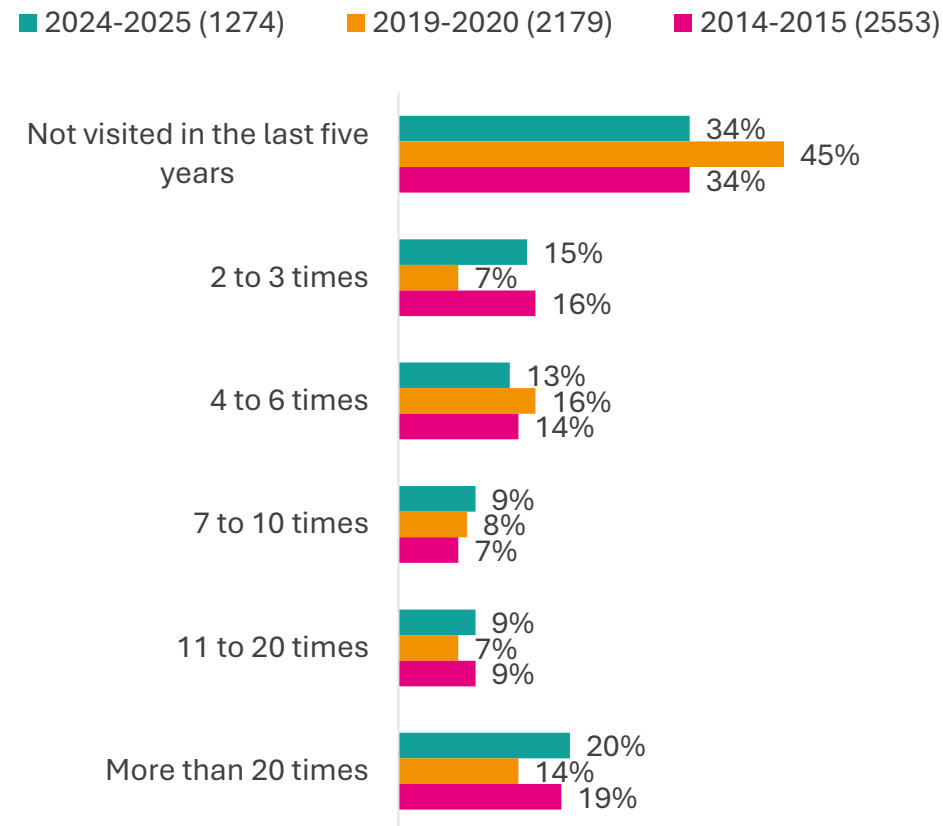
25% of visitors had never visited before, and 9% had visited before but not in the last five years. Two thirds (66%) had visited in the last five years, with one in five visitors visiting more than 20 times in this period.

This mix suggests that the Cairngorms National Park offers experiences that appeal to and attract new visitors, as well as providing positive experiences that drive repeat visits. This gives the National Park a strong visitor base.

The proportion of first-time visitors was higher among those from Europe (excluding the UK) (72%) and the rest of the world (82%), however given the journey time taken for these groups to get to the National Park, the presence of a number of repeat visitors among them shows a strength of connection felt by some visitors to the National Park. Visitors in Summer (27%) and Autumn (29%) were more likely to be first-time visitors than visitors in Spring (21%) and Winter (16%)

Younger visitors were also more likely to be first-time visitors, with 36% of those aged 16-34 on their first visit to the National Park. Meanwhile 25% of those aged 65+, and 24% of those aged 55-64, had visited more than 20 times in the last five years.

## Number of times visited the Cairngorms National Park in the last five years

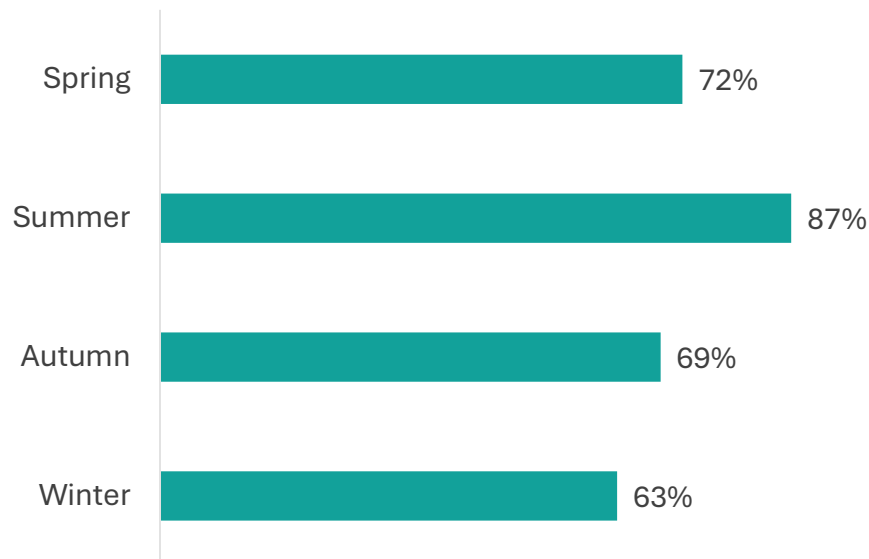


# Repeat visitors had most commonly previously visited in summer (87%)

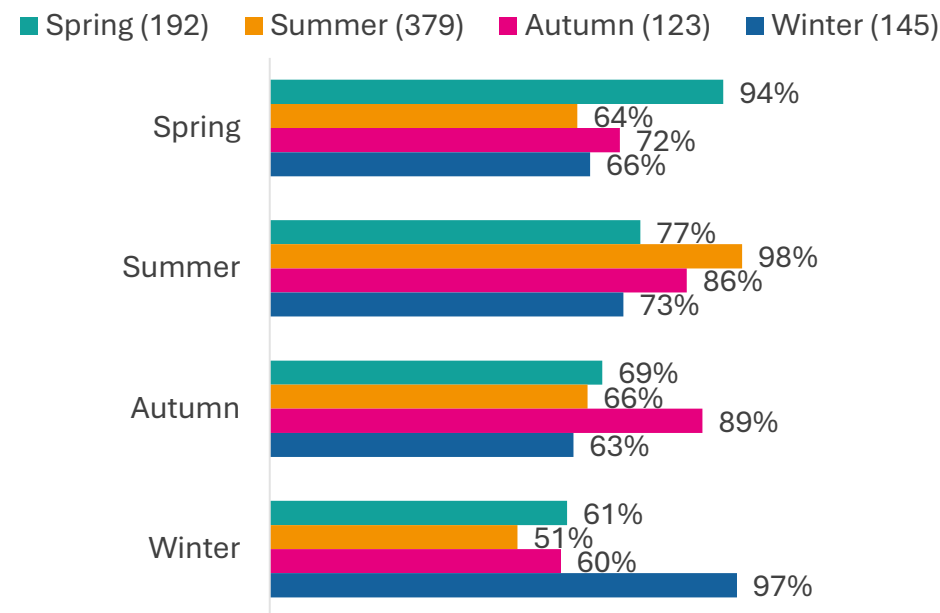
Most visitors tended to report that they had previously visited in the season of their current visit. For example, of those who had been to the National Park before, 97% of those interviewed in winter had previously visited in Winter, while only 51% had visited in Summer. This may be due to a preference for the types of activities that visitors like to take part in on their visit, as 32% of visitors who were interviewed in Winter had participated in winter sports such as skiing.

Among those who had only visited 2-3 times in the last five years, including their current visit, Summer was by far the most visited season, with 72% stating they had previously visited in Summer, while 42% had visited in Spring, which was the next most commonly visited season.

Season previously visited in (all repeat visitors)

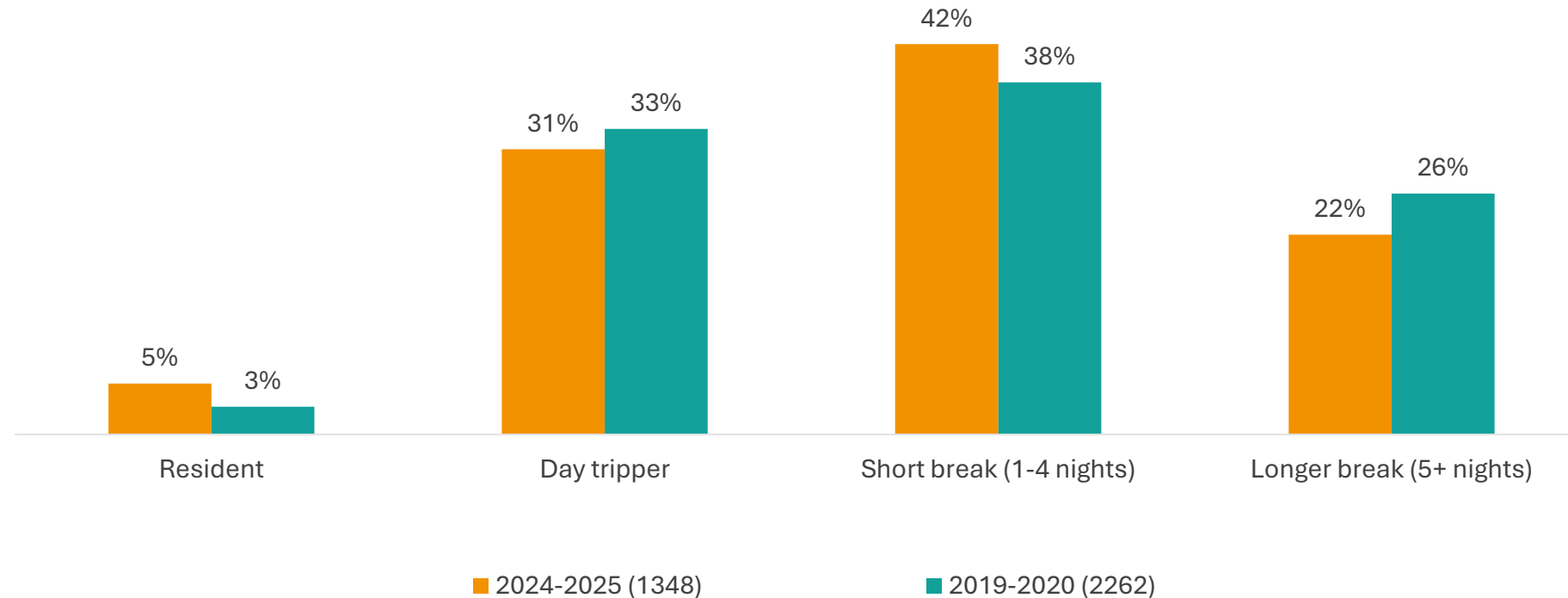


Season previously visited in, among those who had previously visited (split by season of current visit)

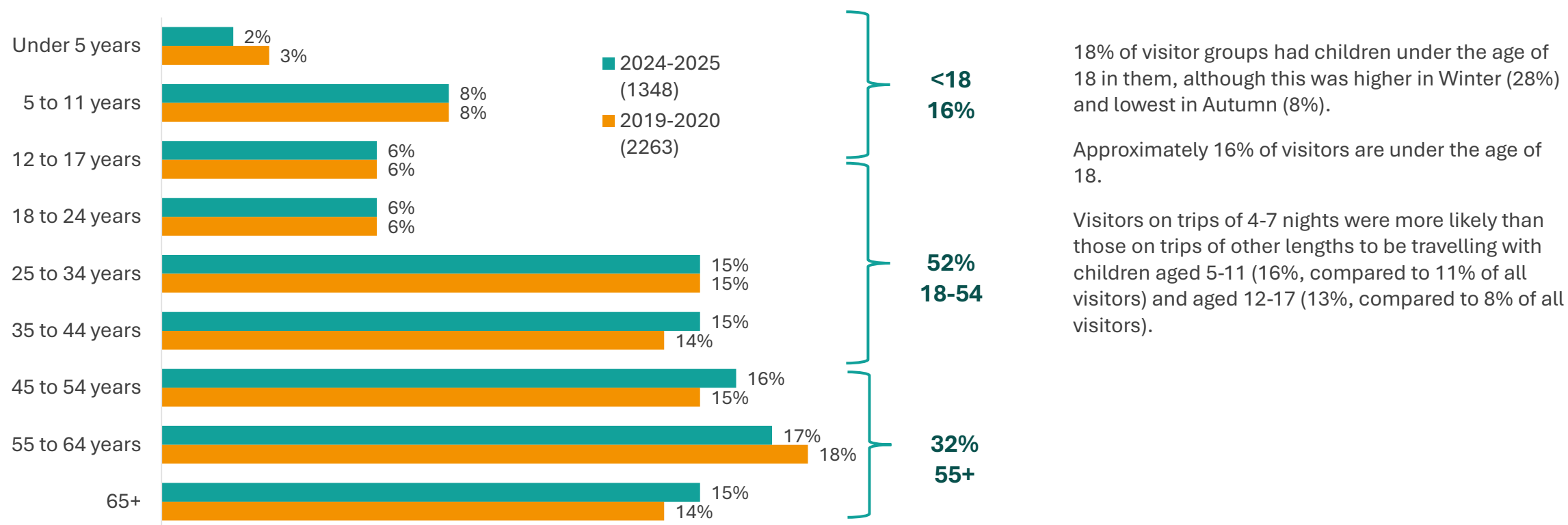


# There was an increase in visitors on a short break compared to previous years

Day trippers were most common in summer (37%).

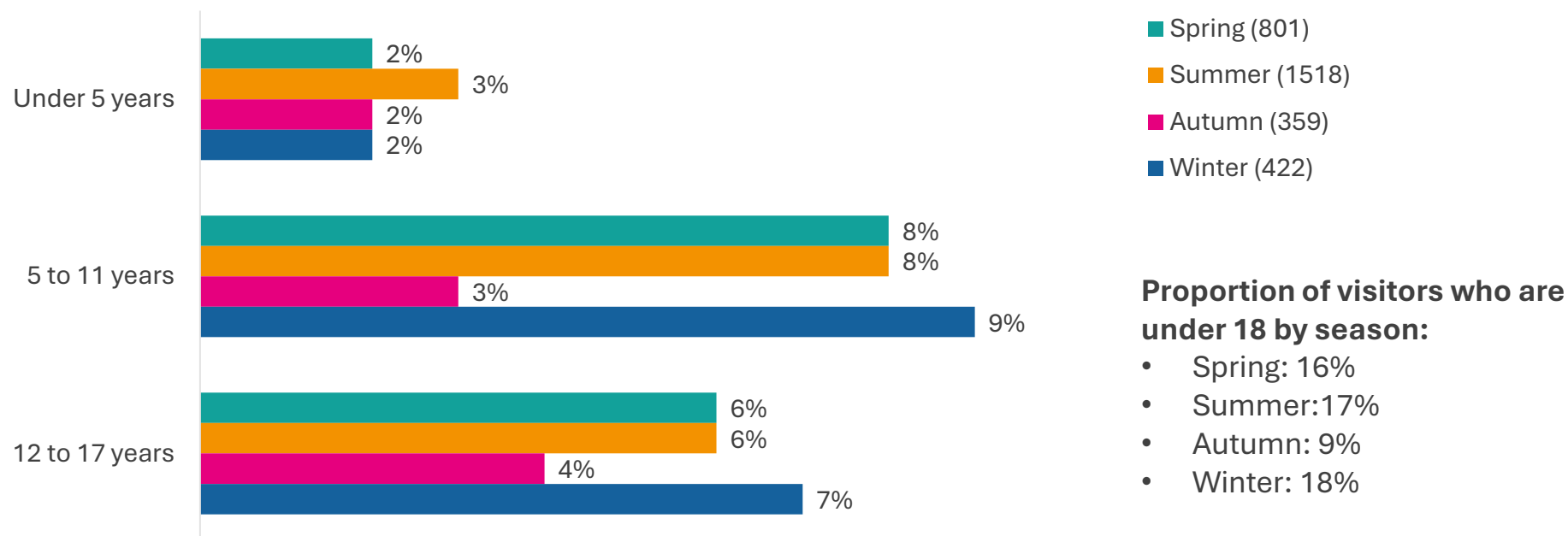


# The visitor profile skews slightly older with 32% of visitors over the age of 55

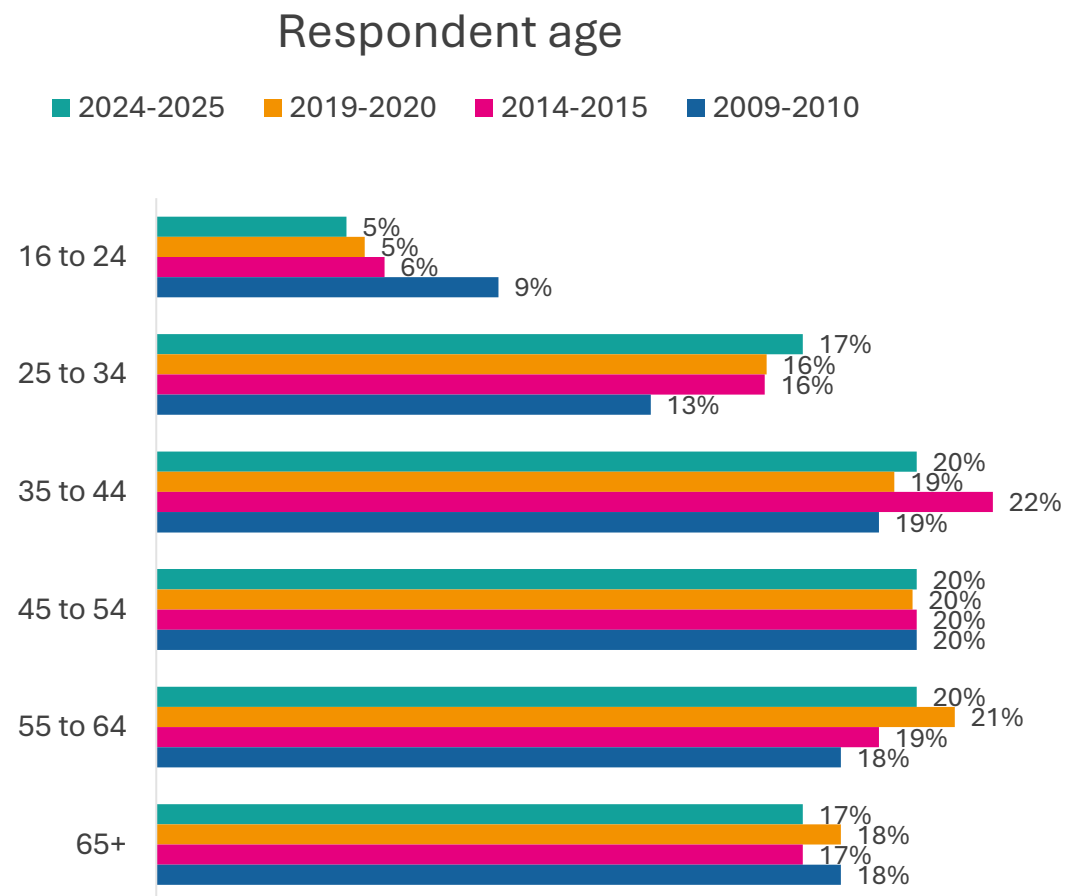


# Visitation with children is most common in Winter, although only slightly more so than in Summer and Spring

The prevalence of visitors who are under-18 is relatively stable across Spring, Summer and Winter (16%, 17%, 18% of visitors are under 18 respectively) based on the group composition reported during interviews.



# The age profile of visitors was consistent with previous years



# The Cairngorms National Park attracts a mix of employed and retired visitors

	Cairngorms Visitor Survey 2024-25	Cairngorms Visitor Survey 2019-20	Scotland (Census)*
Full time employed	60%	55%	36%
Part time employed	7%	8%	12%
Self-employed	8%	6%	6%
Apprenticeship/training/student	2%	3%	9%
Retired	22%	24%	23%
Unemployed	1%	1%	13%
Prefer not to say	1%	0%	-

Retirees included 29% of those aged 55 to 64, indicating that the National Park attracts retirees underneath the state pension age.

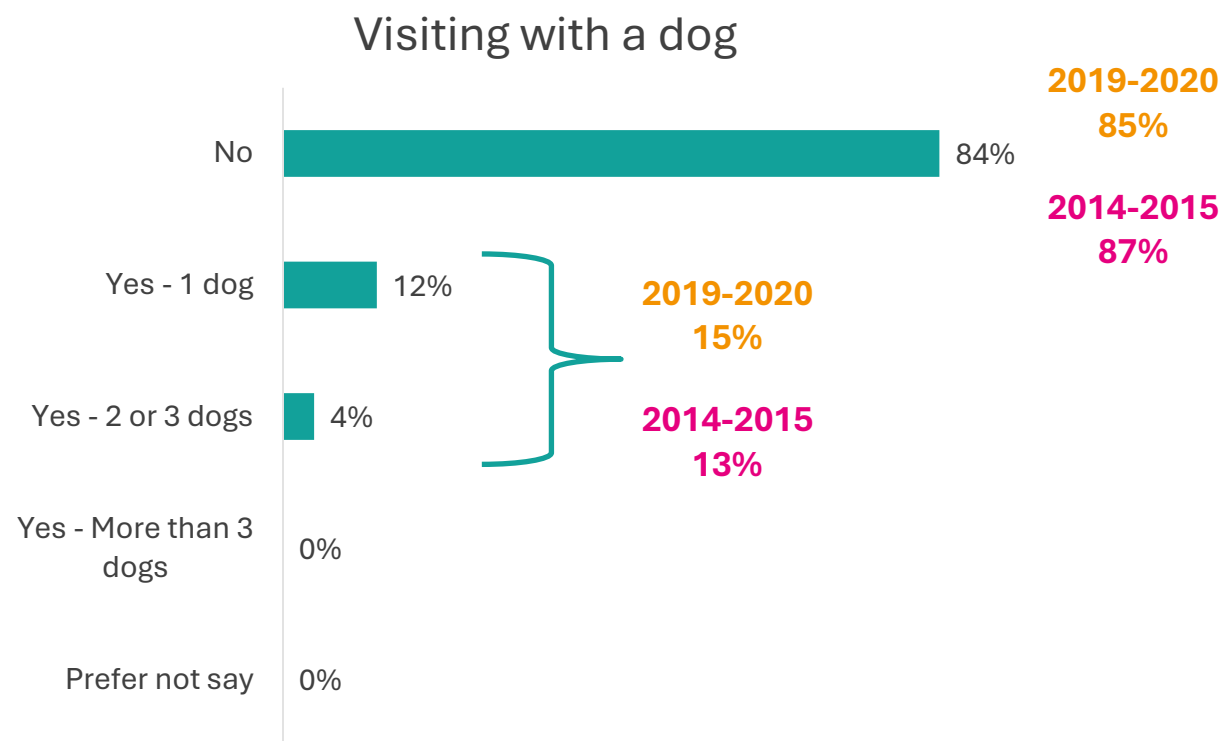
Visitors on longer trips were more likely to be retired, with 34% of those staying for over seven nights being retired. They also made up 26% of visitors who had been to the National Park 20+ times in the last five years.

Visitors from overseas, particularly those from Europe (excluding the UK), were most likely to be full time employed (74%)

Visitors in Winter were less likely to be retirees than in other seasons, with only 17% of visitors in winter being retired, compared to 22% in summer. Meanwhile, 12% of visitors in Winter worked part-time, compared to 6% in summer.

Retired visitors were more likely to be visiting the National Park to enhance their mental health (25% cf. 21%), with the most common activity retirees are hoping to engage in being “just relaxing” (76%), with this group significantly less likely to be engaging in more active pursuits. Those who are full time employed were most likely to be visiting to take part in outdoor pursuits (42% than visitors as a whole (38%).)

# Almost one in six (17%) visitors visited the National Park with a dog



The proportion visiting with a dog increased from 15% in 2019/20, however in previous years owners were not asked how many dogs they attended with.

Most of those travelling with a dog were with only one dog, with 12% of all visitors visiting with one dog, and 4% with 2 or more dogs. Of those who visited with a dog, less than 1% stated that this was an assistance or service dog.

First time visitors were least likely to visit with a dog, with only 7% doing so. This could be because first time visitors are more likely than repeat visitors to be from overseas, with no overseas visitors bringing a dog on their visit. However, it could also be due to a lack of awareness among first time visitors of the suitability of the National Park for dogs.

Visiting with a dog was most common among those visiting for 4-7 nights, with 22% of those visiting for this length of time visiting with a dog. 15% of day trippers were travelling with dogs.

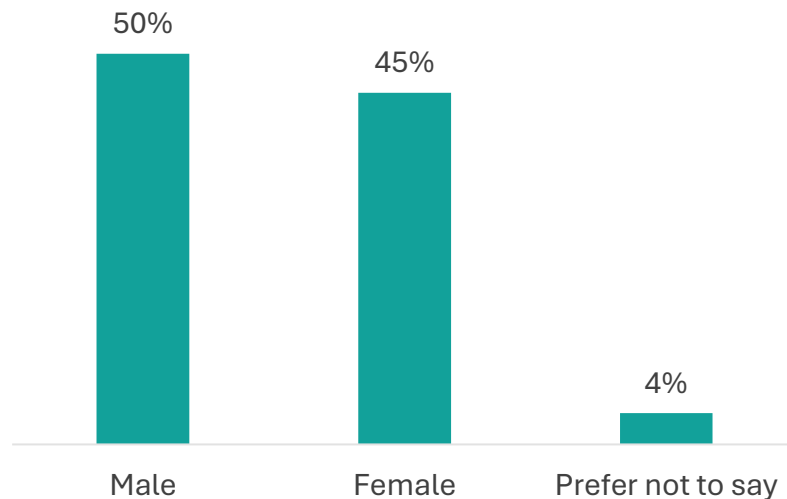
# Visitors to the National Park are relatively equally split in terms of their sex and gender

Respondents to the survey were asked to write in their sexual orientation in a free text box on the tablet the survey was completed on. These responses were then coded into categories, which are displayed below.

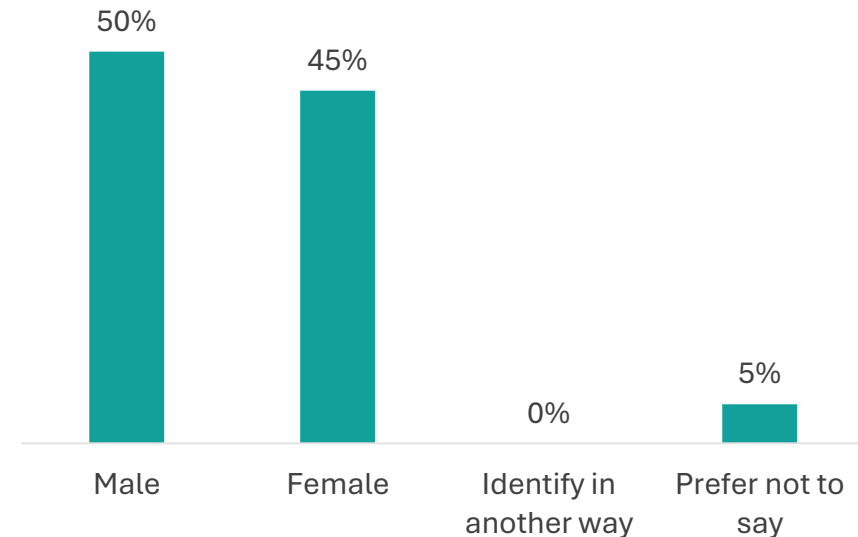
It is of note that the most frequent repeat visitors were more likely to be male than female, with 57% of those who visited 20+ times in the past five years identifying their sex and gender as male, while 37% identified as female. Older visitors were also slightly more likely to be male, making up 56% of those aged 65+, while 39% identified as female.

This proportion was similar to in 2019-20, when 56% identified their gender as male, and 44% as female.

Sex (coded from free text responses)



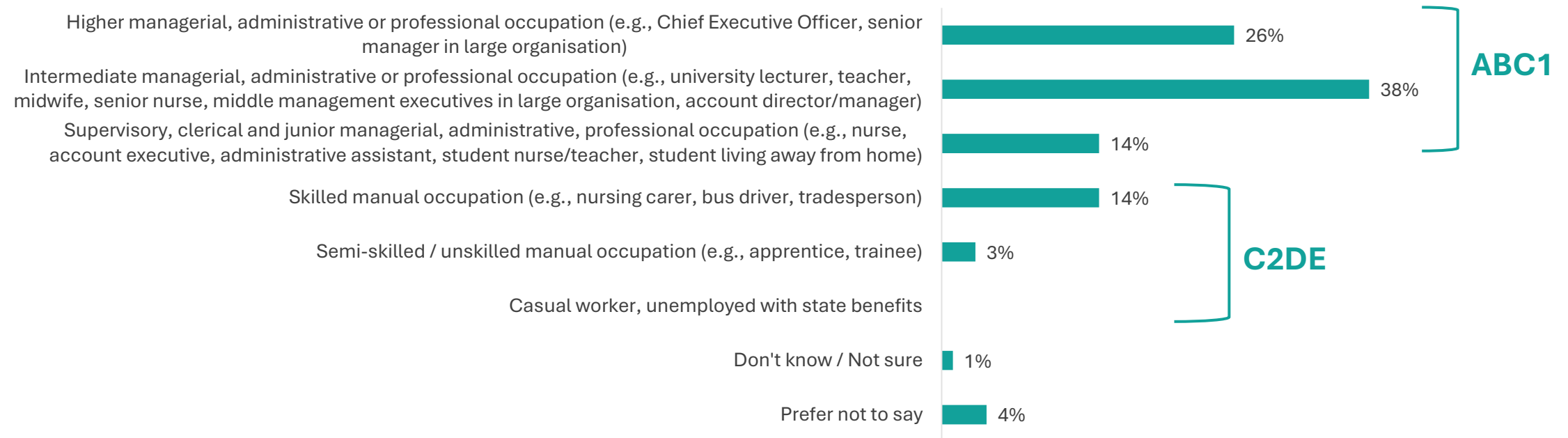
Gender (coded from free text responses)



# The majority of visitors are classed as being in the ABC1 Social Grade

78% are in the ABC1 Social Grade and 17% in C2DE. The proportion of visitors from these social grades is therefore at a similar level to residents. According to the 2024-25 resident survey, 73% of residents of the Cairngorms National Park were in the ABC1 Social Grade. According to the 2022 Census 45% of residents in Scotland were in Social Grade ABC1 and 32% in C2DE. Therefore, when looking at the census data, ABC1 is over-represented in visitors to the National Park.

## Occupation of Chief Income Earner



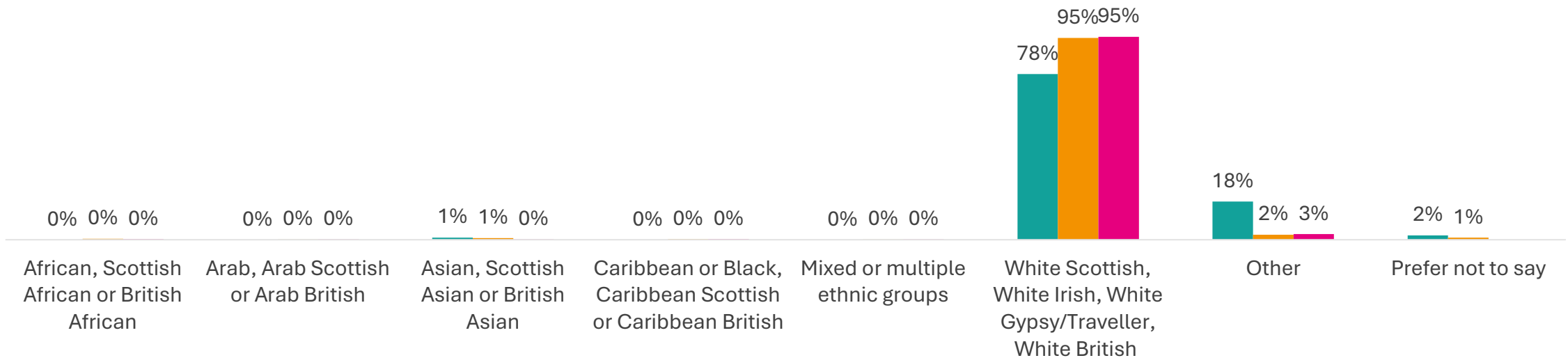
# The majority of those interviewed were white

78% identified as White Scottish or other White British identities. 18% of all visitors were from another 'other' ethnicity, although most of these identified as European or American ethnicities. In the 2019 visitor survey, 97% of visitors were White (unspecified whether this is UK or Scottish visitors).

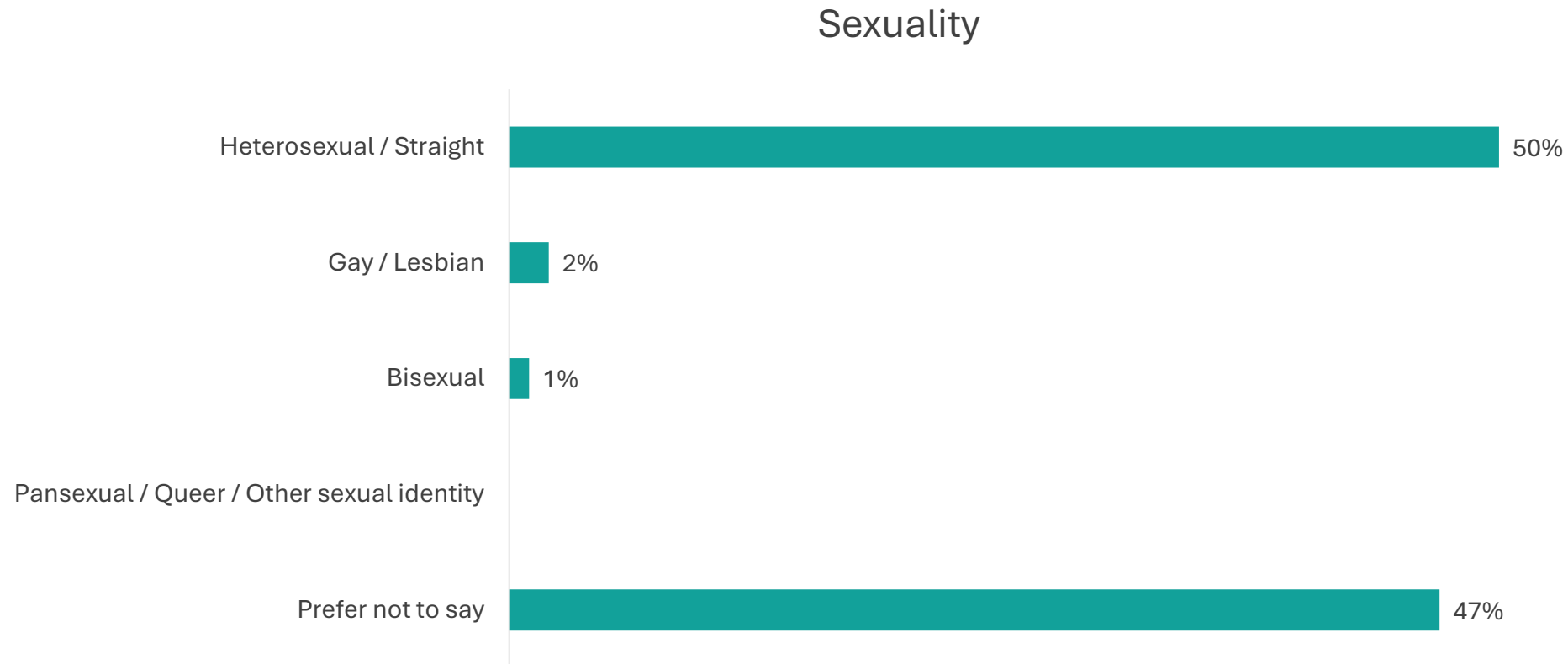
This is largely representative of the broader demographics of the area, however, may suggest more could be done to make the Cairngorms feel like a National Park for all.

## Ethnicity

■ All visitors (1,348) ■ Visitors from UK (1,008) ■ Visitors from Scotland (730)



# Many visitors preferred not to provide their sexuality



- Q38. What is your sexual orientation? Sample base size: 1347

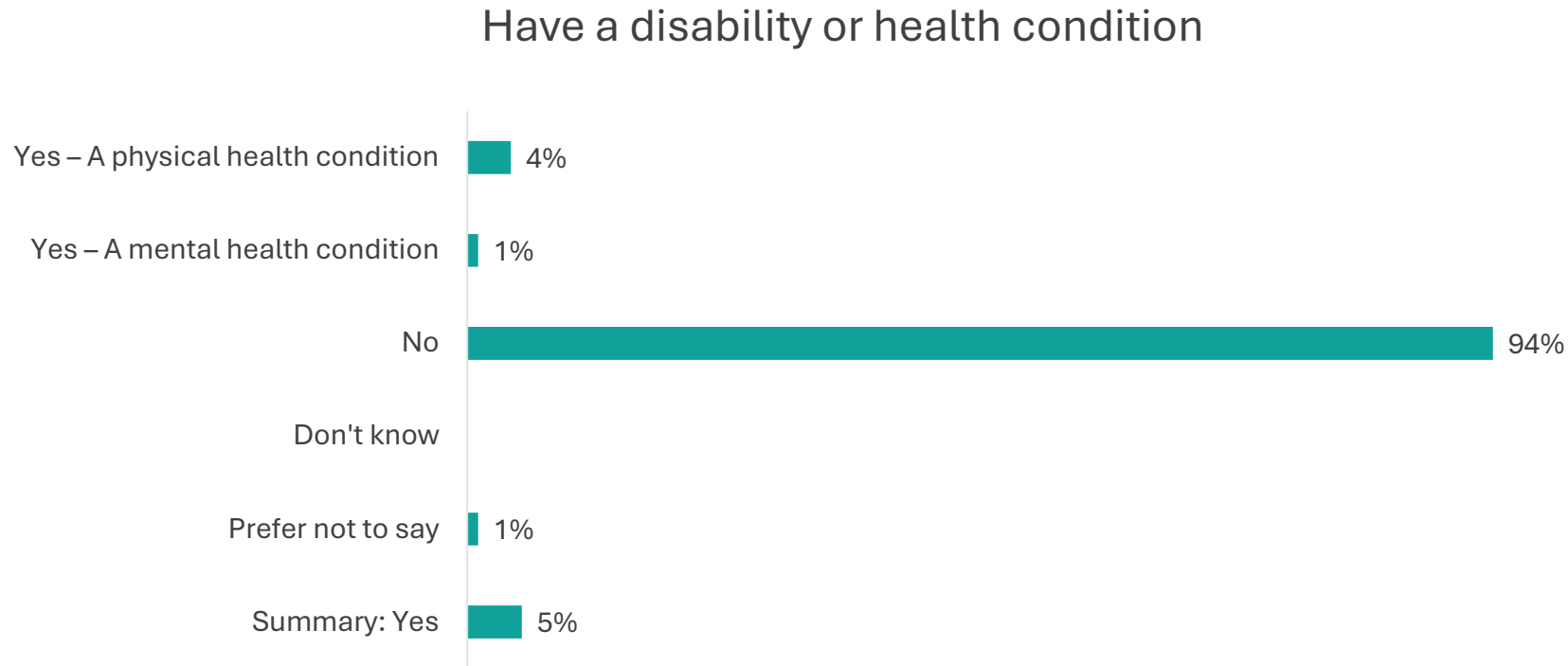
# Accessibility Requirements



# A minority (5%) of visitors had a physical or mental health condition

This was highest among visitors from the UK (outside of Scotland) (7%), those aged 65+ (8%) and carers (11%).

In 2019-2020, 9% reported that they or someone in their visitor group had a disability or health condition, however as this question asked about the whole visitor group not just the respondent, they should not be directly compared.



# One in twenty (5%) visitors have caring responsibilities

This rises to 7% among those visiting from Scotland. At a national level, 88% report having no caring responsibilities, with 12% having caring responsibilities. This suggests that carers are less likely to be visitors to the Cairngorms National Park.

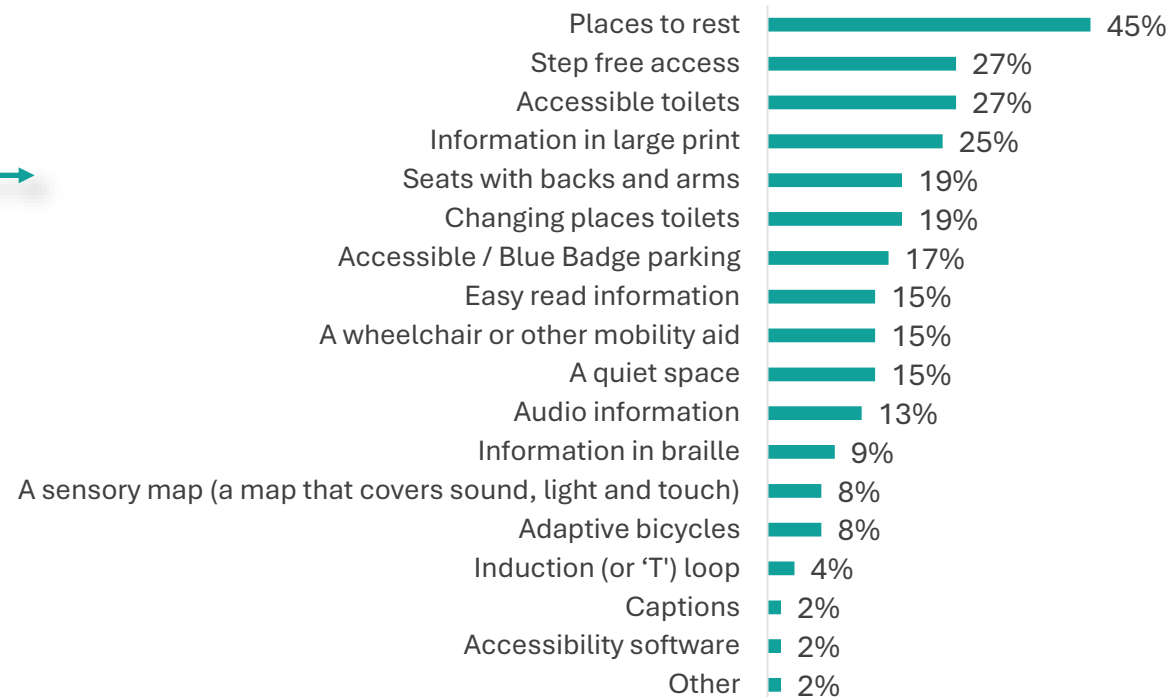
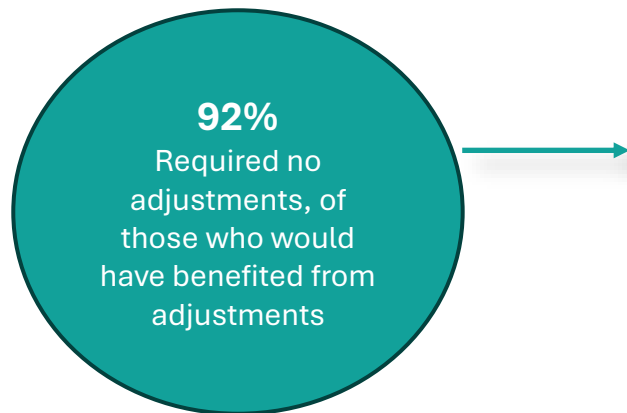


Q46. Do you have any caring responsibilities? Sample base size: 1348  
National data drawn from Scottish Census 2023

# A small number of visitors require some accessibility adaptations to make their visit more comfortable

This is largely reflective of the small number of visitors indicating they had a mental or physical health condition. The most frequently identified adaption is a greater number of places to rest (2% of overall, 24% of those who required an adjustment). This is also reinforced by 93% of visitors expressing satisfaction with the accessibility of the National Park.

What is needed to make visit more comfortable or accessible (56)

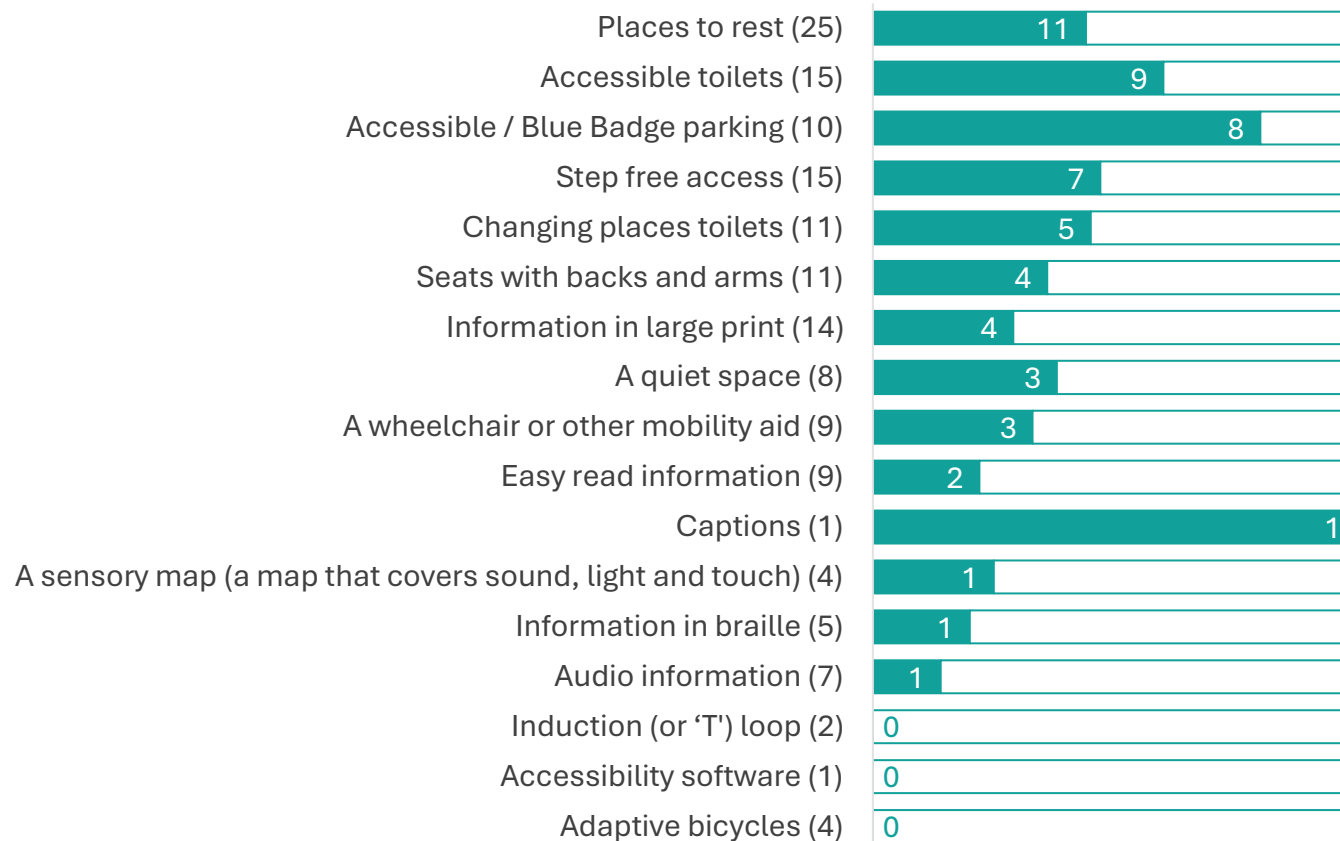


# Experiences were mixed when it came to being able to access these adaptations

Of those who desired each adaption, the highest proportion who could actually use the adaptation was captions, however as only one person requested this, it is of lesser importance compared to other options.

The largest caps in availability of adaptations were audio information, which was only able to be used by 1 out of the 7 visitors who said it would have made their visit more comfortable or accessible, and , and information in braille, which was only used by 1 out of the 5 visitors who stated it would have helped their visit.

Of those who desired each adaptation, number who were able to use it on their visit

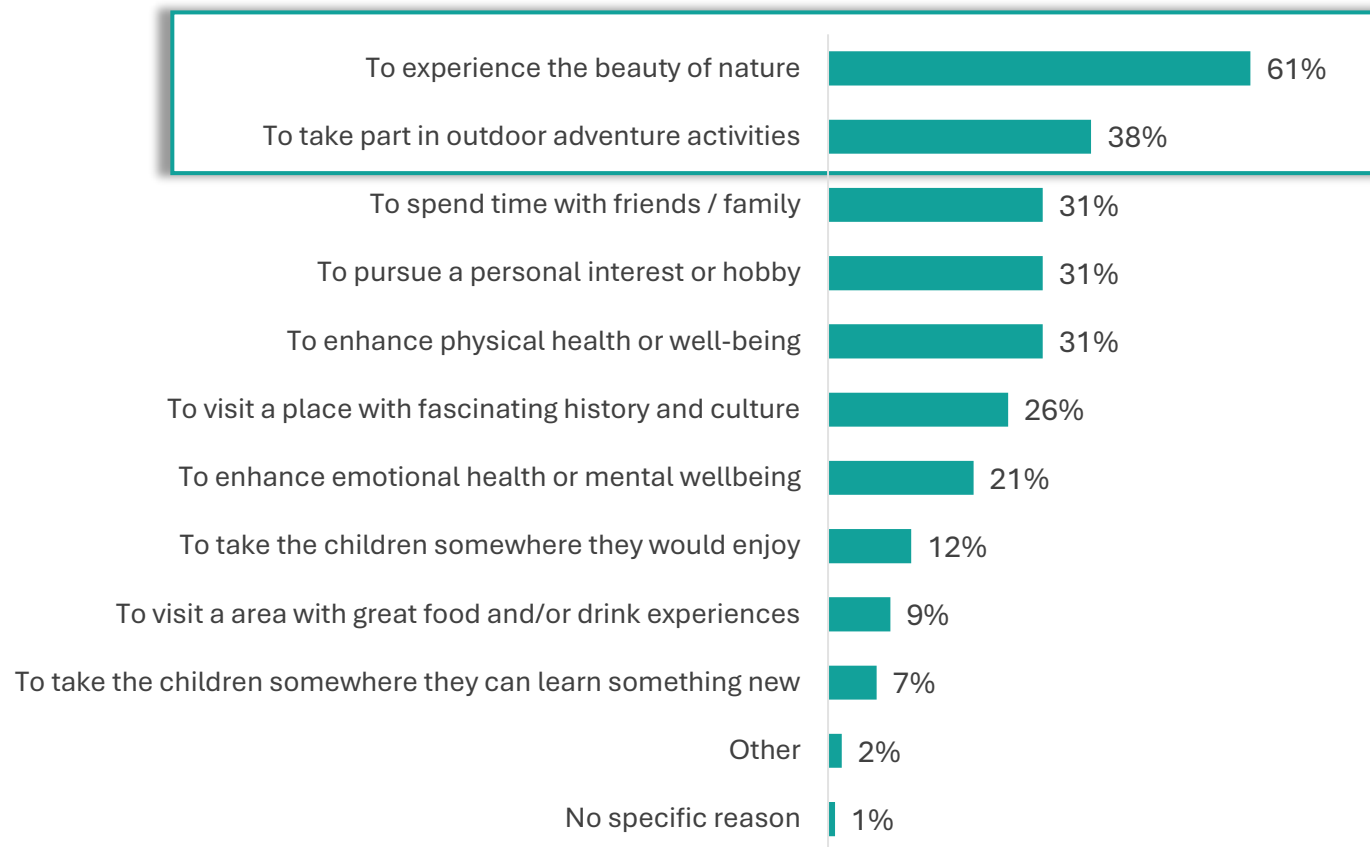


# Planning a Trip to the Cairngorms National Park



# The opportunities to engage with the outdoors and nature are the key drivers of visits to the National Park

## Reason for visit

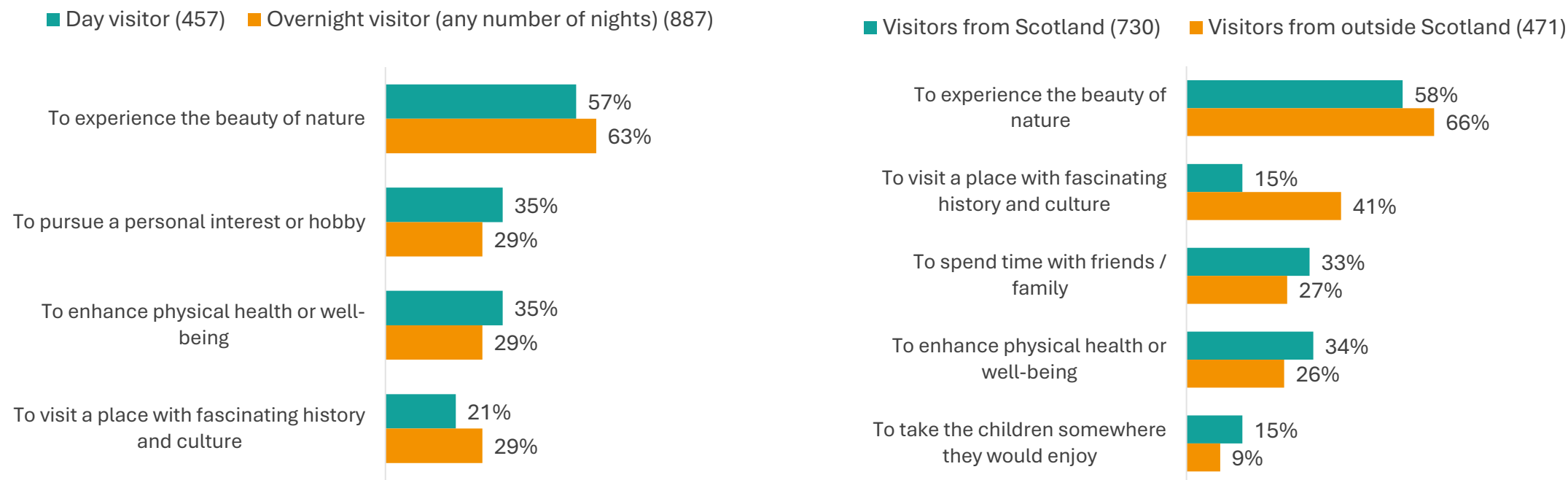


- While the most common reasons for visiting were similarly likely to be motivations for both residents and visitors to the National Park, experiencing the beauty of nature was significantly more likely to be a motivation for visitors (62%) than residents (47%). This highlights the importance of the beauty of the National Park as a draw to external visitors.
- In particular, visitors from Europe, outside of Scotland, are most likely to say that they were hoping to experience the beauty of nature, including 67% of visitors from the rest of the UK, and 69% from Europe (excluding the UK) stating this, suggesting the uniqueness of the Scottish landscape is a compelling draw.
- The beauty of nature is also a key draw for first time visitors, 66% of whom cited this as a motivation for visiting. Meanwhile, the most regular visitors, those who have visited more than 20 times in the last five years, are more likely than others to cite taking part in an outdoor adventure activity as a reason for their visit (44%)

## Overnight visitors and those from outside of Scotland are more likely to visit to experience the beauty of nature and a place with fascinating history and culture

Meanwhile, day visitors are more likely than overnight visitors to be visiting for reasons linked to personal enrichment, such as pursuing a personal interest or hobby, or enhancing their physical health and wellbeing. Similarly, visitors from Scotland are more likely to visit to spend time with friends or family, to enhance physical health or wellbeing, or to take children somewhere they would enjoy, than other visitors.

### Reason for visit



Relative to each other, older visitors have a greater interest in enhancing their physical or emotional health and wellbeing, while younger visitors have a greater interest in taking part in outdoor activities and spending time with friends and family

#### Reason for visit

	16-34 years old (297)	35-44 years old (267)	45-54 years old (266)	55-64 years old (269)	65+ years old (239)
To take part in outdoor adventure activities	44%	41%	42%	34%	28%
To spend time with friends / family	37%	36%	28%	25%	26%
To enhance physical health or well-being	25%	28%	32%	36%	36%
To enhance emotional health or mental wellbeing	21%	15%	19%	27%	20%
To take the children somewhere they would enjoy	8%	24%	17%	7%	7%
To take the children somewhere they can learn something new	3%	15%	10%	5%	4%

- Q13a. What were you most hoping to get out of your visit to the Cairngorms National Park on this trip? Sample base sizes in brackets
- Figures that are significantly lower than the overall sample are highlighted **pink**, those that are significantly higher than the overall sample are highlighted **teal**

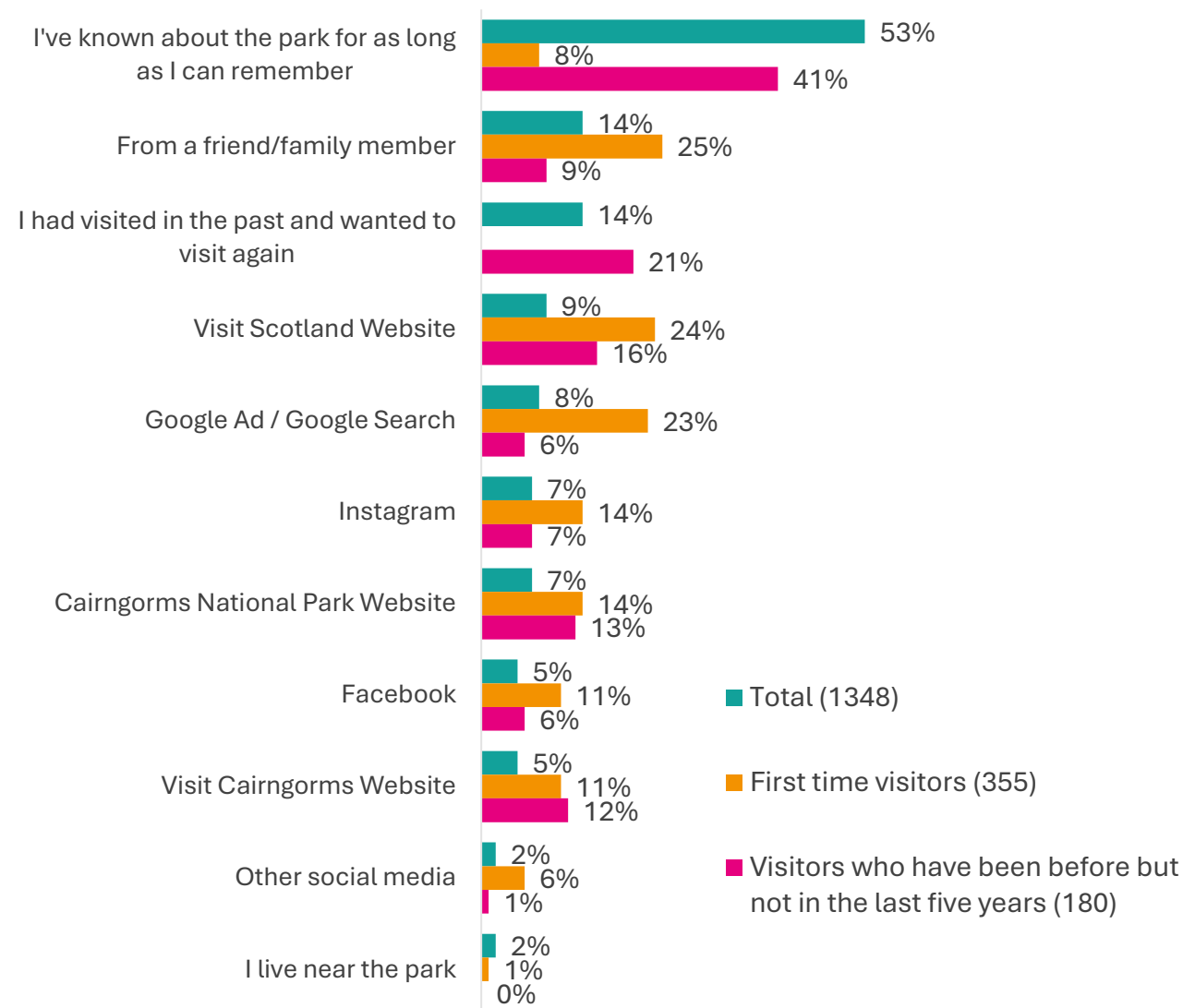
# Half of visitors had known about the Cairngorms National Park for as long as they can remember

- The proportion who stated that they had known about the National Park for as long as they could remember was lowest among:
  - First time visitors (9%)
  - Visitors from Europe (outside of the UK) (8%)
  - Visitors from the rest of the world (10%)
  - Visitors age 16 to 34 years old (40%)

First time visitors were most likely to have heard about the Cairngorms National Park from a friend/family member, the VisitScotland Website, a Google Search or Social Media

This could be because these are the methods which may be most effective in attracting new visitors to the National Park, or because other methods are currently underutilised and not working to their full potential. A similar trend was seen among visitors who have visited before but not in the last five years, although 41% of this group also stated that they had known about the National Park as long as they can remember.

## How visitors heard about the Cairngorms National Park



## Visitors from mainland Europe and the rest of the world most commonly found out about the National Park via Google, the Visit Scotland Website and Social Media

	Scotland (730)	Rest of UK(278)	Rest of Europe (120)	Rest of world (73)
I had visited in the past and wanted to visit again	14%	20%	8%	3%
From a friend/family member	9%	22%	18%	21%
Visit Scotland Website	2%	9%	33%	21%
Cairngorms National Park Website	3%	8%	14%	10%
Google Ad / Google Search	2%	9%	18%	26%
Visit Cairngorms Website	2%	6%	7%	10%
Instagram	4%	9%	13%	10%
Facebook	3%	6%	13%	3%
Summary: Social Media (includes Instagram, Facebook, X (formerly Twitter), TikTok and other platforms)	6%	12%	23%	18%

## Younger visitors are significantly more likely to have heard about the National Park via Social Media and other online channels

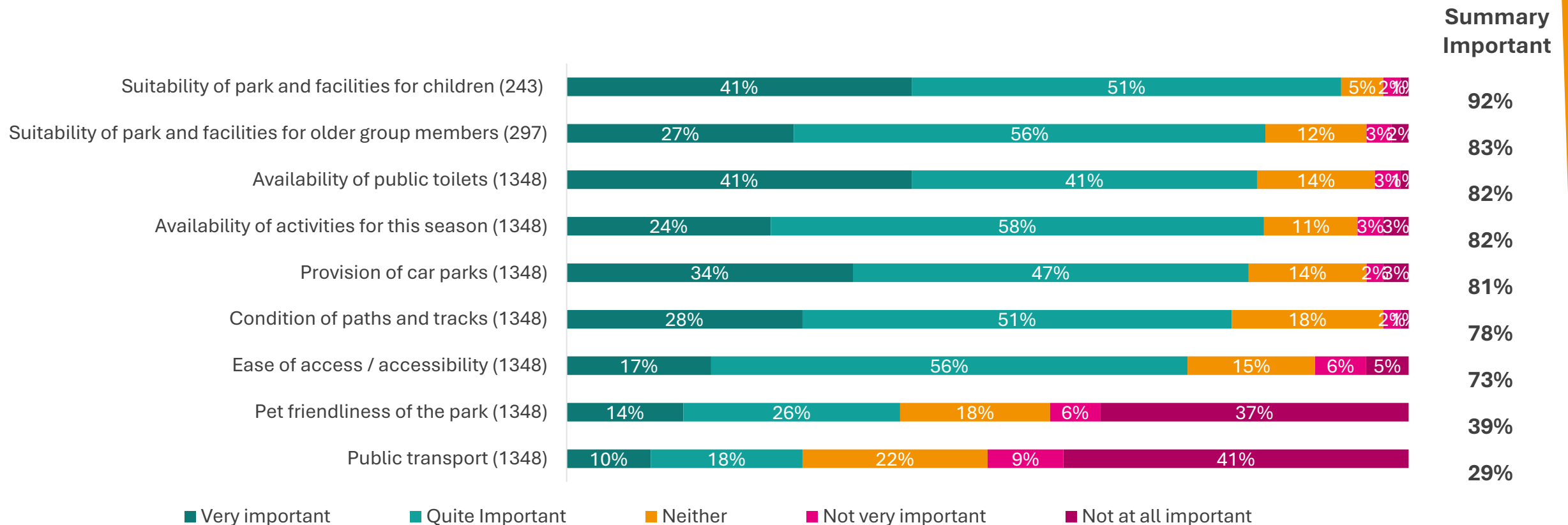
	16-34 years old (284)	35-44 years old (255)	45-54 years old (252)	55-64 years old (251)	65+ years old (223)
I had visited in the past and wanted to visit again	10%	14%	15%	15%	14%
From a friend/family member	17%	15%	12%	14%	10%
Visit Scotland Website	12%	10%	13%	6%	4%
Cairngorms National Park Website	10%	7%	8%	3%	4%
Google Ad / Google Search	12%	8%	11%	6%	3%
Visit Cairngorms Website	7%	9%	3%	1%	2%
Instagram	17%	6%	5%	2%	3%
Facebook	10%	6%	5%	4%	1%
Summary: Social Media	21%	11%	10%	6%	3%

Q13e. How did you hear about the Cairngorms National Park as a place to visit prior to this visit? Sample base sizes in brackets

Figures that are significantly lower than the overall sample are highlighted **pink**, those that are significantly higher than the overall sample are highlighted **teal**

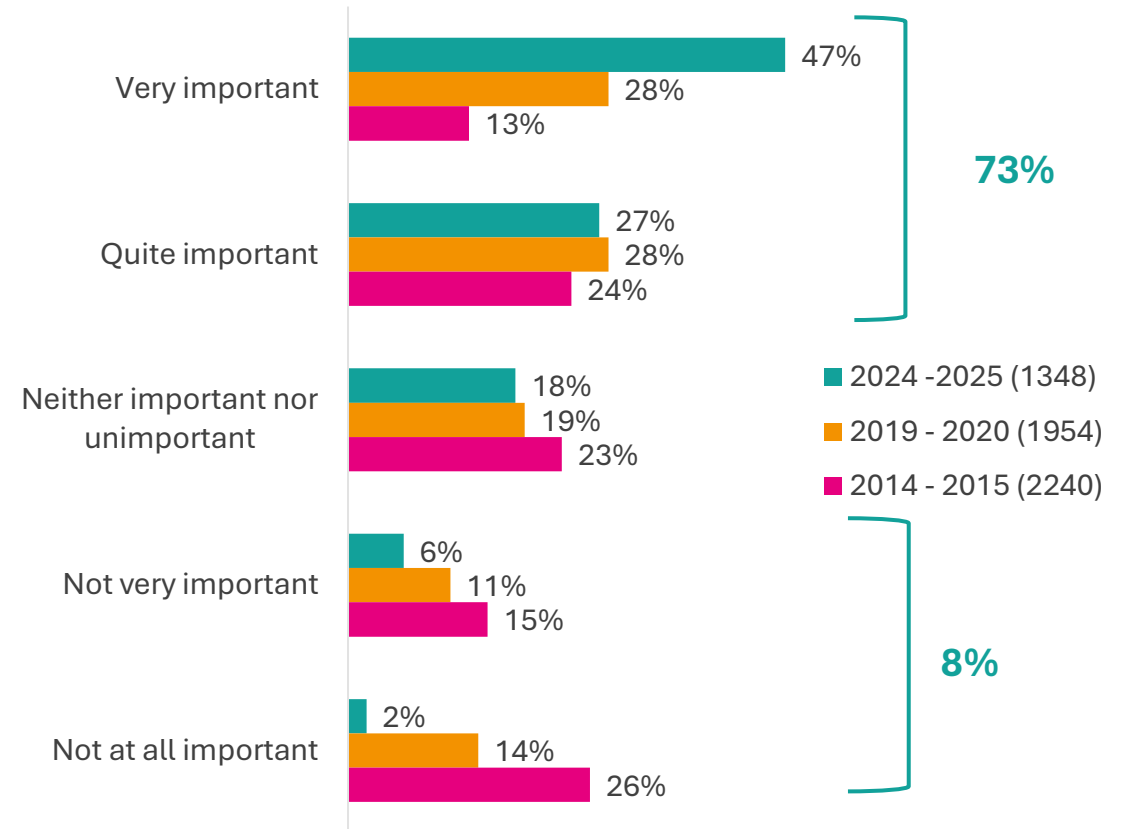
# The availability of public toilets and activities for all seasons are most important to visitors

- This is likely explained by 72% of visitors travelling to the National Park using a private car, with a similar proportion using a car to get around the National Park. The provision of toilets, paths and tracks being well maintained and provisions for children are also important to potential visitors.



# Approximately two-thirds say that the Cairngorms' National Park status is an important consideration when deciding where to visit

- Positively, only less than 1% of visitors were not aware the area was a designated National Park.
- The status of National Park is similarly important across all cohorts of visitors, though those aged 16-34 do tend to value this more than older visitors (78% compared to 70% of those aged 55-64). It was also of high importance to first time visitors (78%).



# Visitor Behaviour

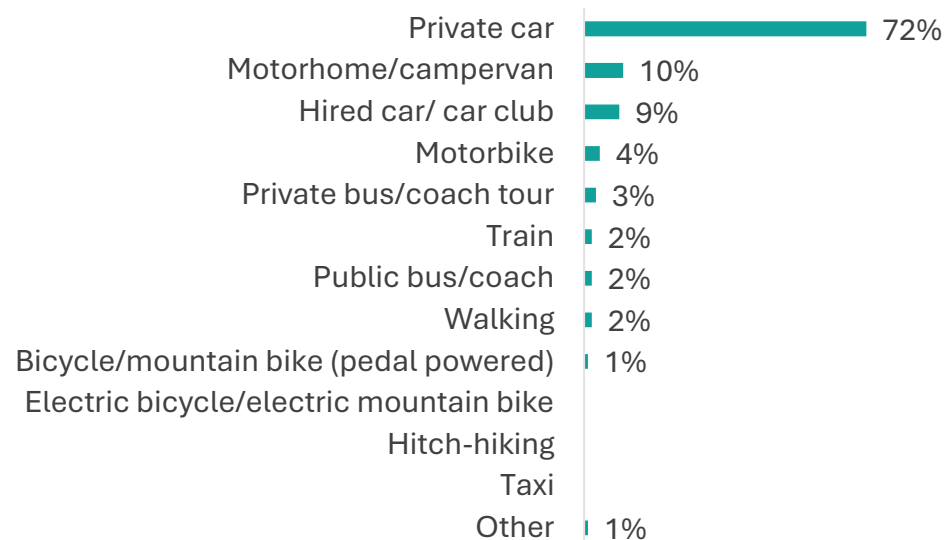


# Private cars are the primary means of transport to and around the Cairngorms National Park

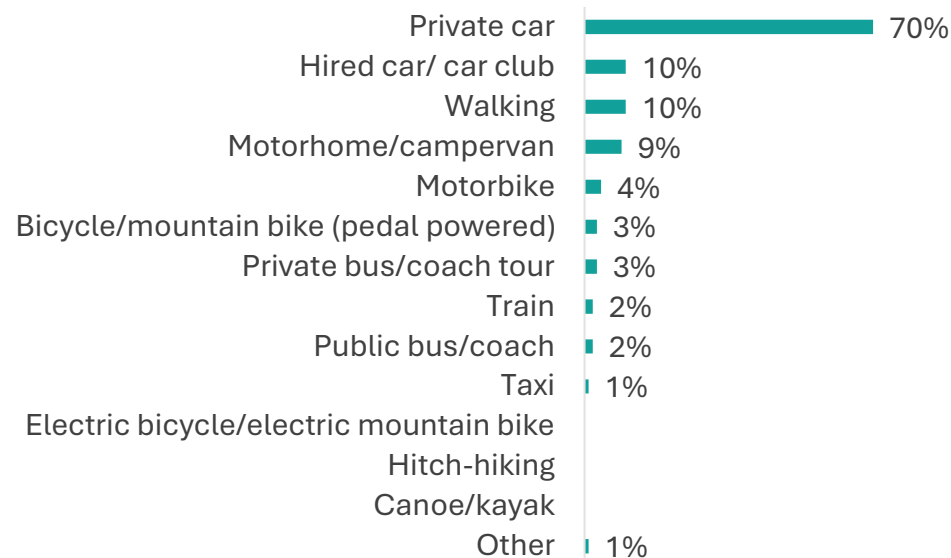
Private or hired vehicles including private cars, motorhomes, hire cars and motorbikes were the most common vehicles used among all visitor groups, although those from Scotland were more likely than those from further afield to use private cars to get to the National Park (84%). Meanwhile, hire cars were most commonly used among visitors from Europe (33%) and the rest of the world (48%), while motorhomes were most commonly used by visitors from the rest of the UK (14%), and Europe (15%).

Looking at the transport used to get to the park, while there has been a decline in those using a private car (from 75%), there has been a corresponding increase in the proportion using motorhomes (from 4%), suggesting that there has been a move from one transport type to the other.

## Transport used to get to the National Park



## Transport used within the National Park



# The use of public and active transport to get to and around the National Park was more common among some visitor groups than others...

\*no groups were significantly more likely than others to use public bus

Groups who were significantly more likely than the overall sample to use the following methods of transport



**Most used to get around the National Park by...**

Visitors aged 55-64 years old (5%)



**Most used to get to the National Park by...**

Visitors from the UK (outside of Scotland) (5%)  
Visitors who have visited 2-3 times in the last five years (5%)  
Overnight visitors (3%)  
Visitors who have a physical health condition (10%)

**Most used to get around the National Park by...**

Visitors who have visited 20+ times in the last five years (4%)  
Visitors with a physical health condition (7%)



**Most used to get to the National Park by...**

**Private bus tour\*:**  
Visitors from outside of Europe (14%)  
First time visitors (6%)

**Most used to get around the National Park by...**

**Private bus tour\*:**  
Visitors from outside of Europe (11%)  
First time visitors (6%)  
Visitors aged 65+ (5%)

# The use of public and active transport to get to and around the National Park was more common among some visitor groups than others...

Groups who were significantly less likely than the overall sample to use the following methods of transport



**Least used to get to the National Park by...**

Visitors from Scotland (less than 1%)

**Least used to get around the National Park by...**

Visitors aged 16-35 (less than 1%)  
Visitors visiting the park in Autumn (less than 1%)



**Least used to get to the National Park by...**

Day visitors (1%)  
Visitors from Scotland (1%)

**Least used to get around the National Park by...**

Day visitors (1%)  
Visitors visiting the park in Summer (1%)



**Least used to get to the National Park by...**

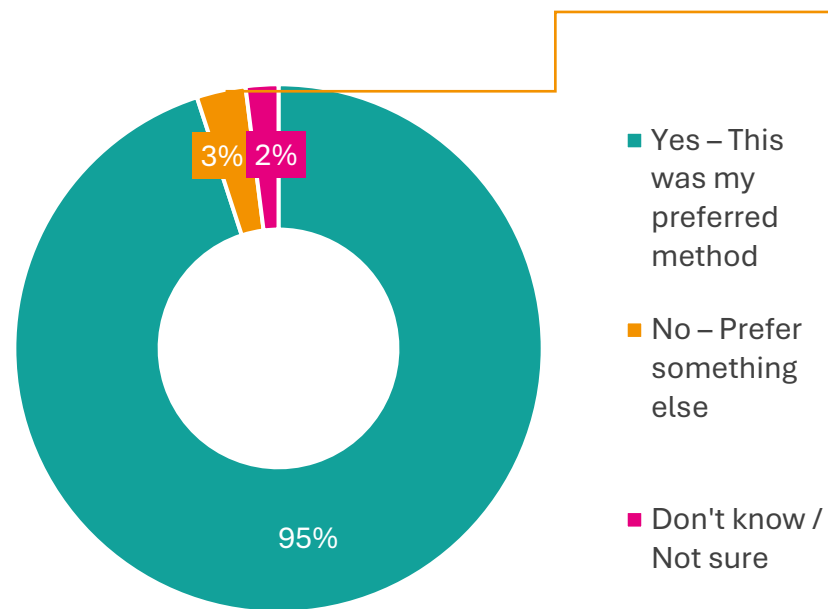
**Private bus tour\*:**  
Visitors from Scotland (1%)

\*no groups were significantly less likely than others to use public bus

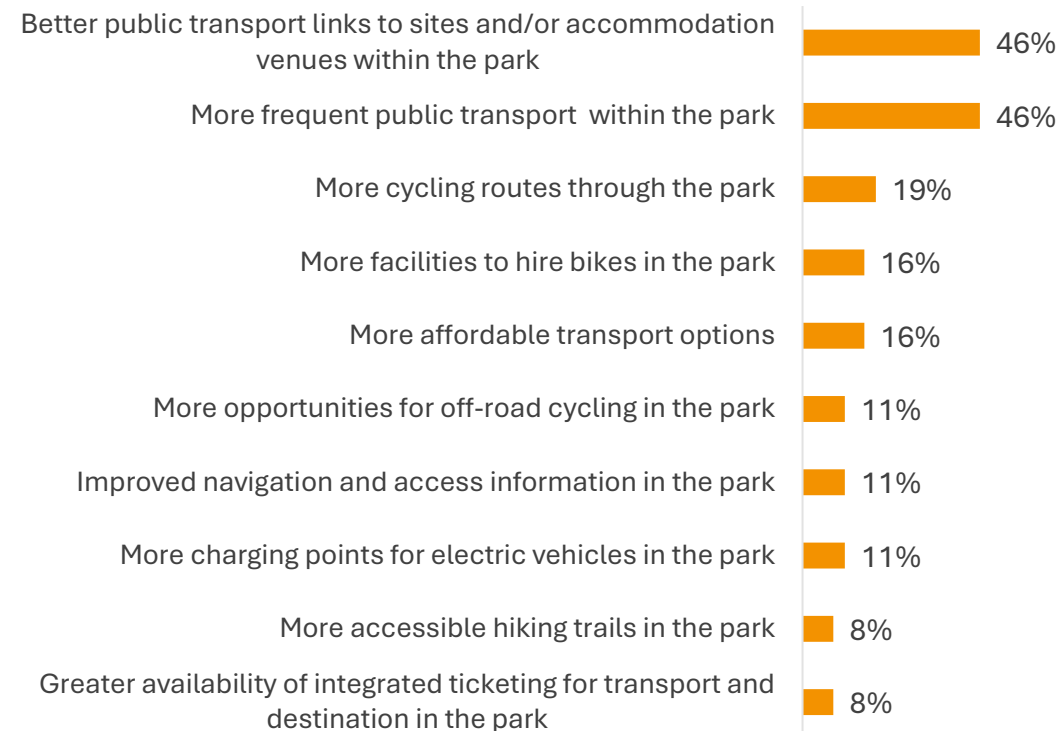
# Most (95%) visitors were able to use their preferred method of transport, with better or more frequent public transport most desired

Visitors who had visited the National Park but not in the last five years (90%), LGBTQIA+ visitors (82%) and visitors from the UK (outside of Scotland) (93%) were least likely to have been able to use their preferred method of transport. Those travelling by train are less likely than those travelling by other methods; to say they have travelled by their preferred method (87%).

Able to travel by preferred method of transport?

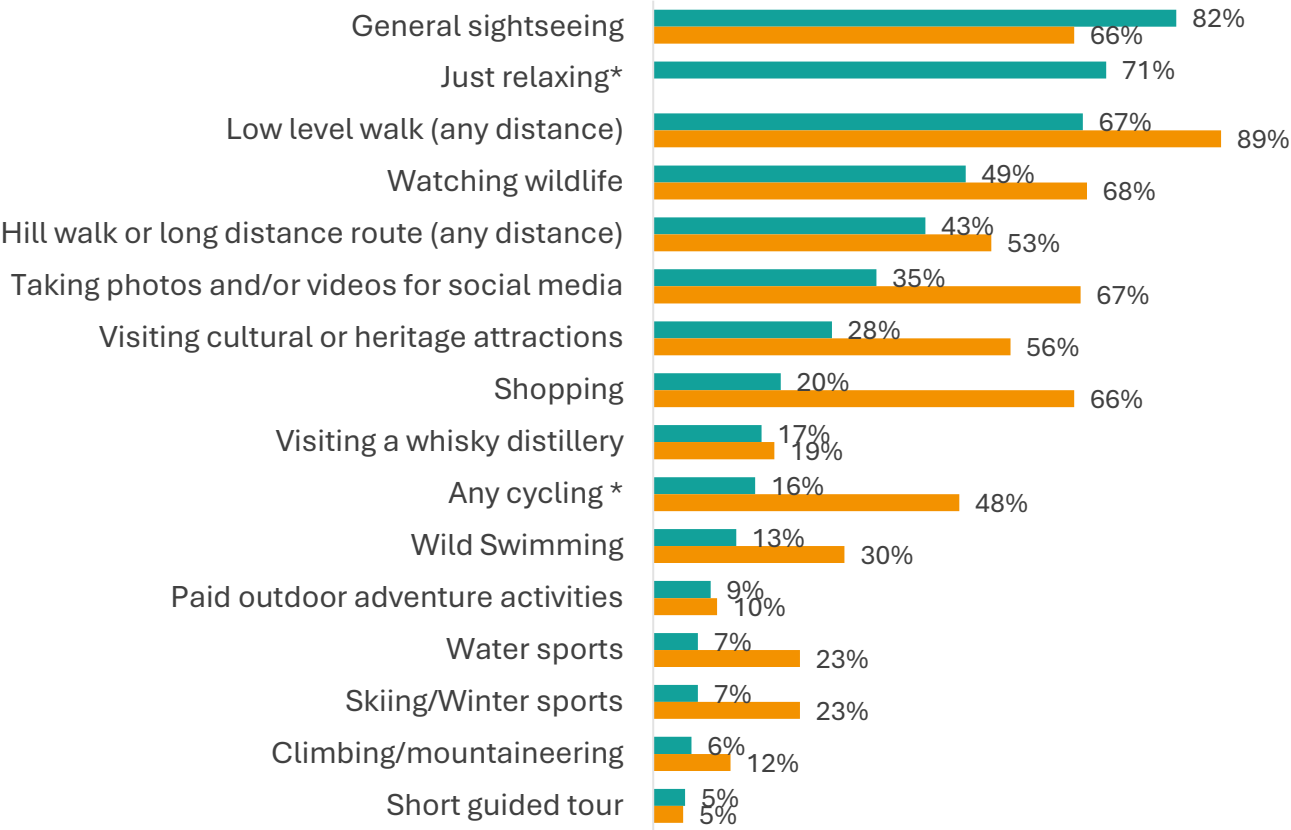


Factors that would have enabled use of preferred method (caution, low base size)



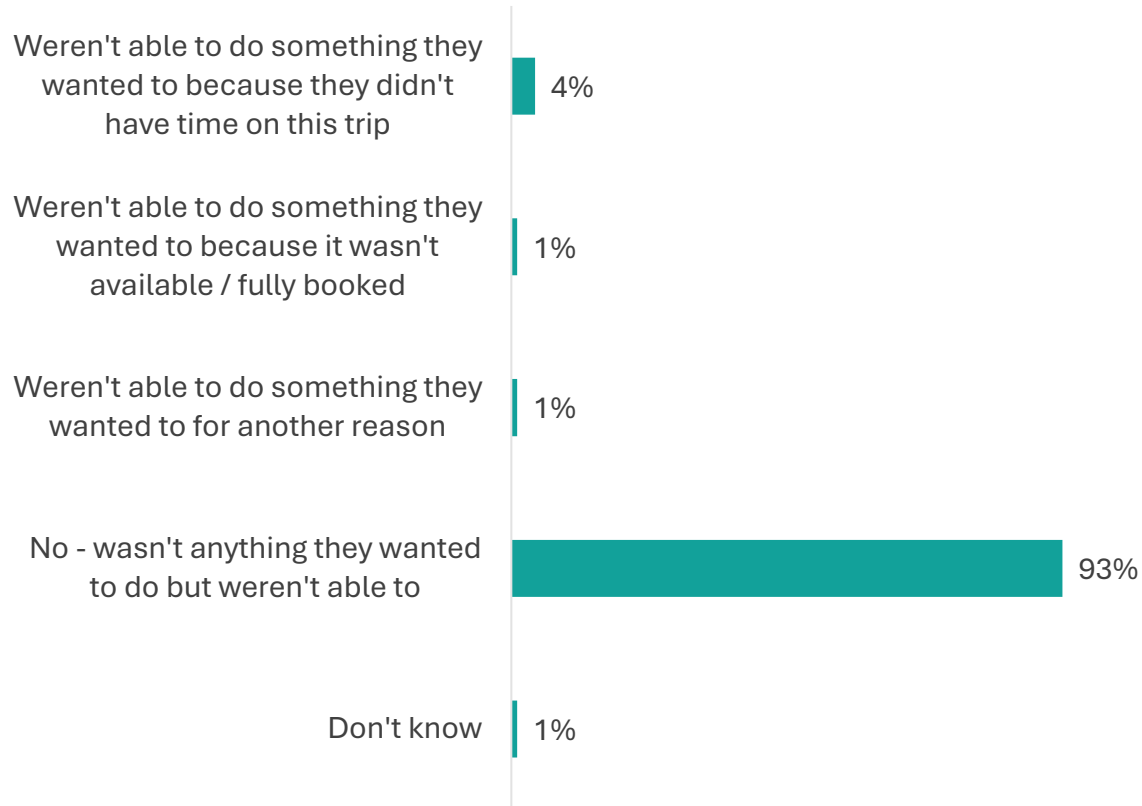
# Many of the activities that visitors take part in on their visit are similar to those that residents take part in, with walking and watching wildlife common among both groups

■ Visitors (activities taken part in on their trip) ■ Residents (activities taken part in last 12 months)



- The range of activities visitors are planning to take part in or have already taken part in shows the variety of attractions of the Cairngorms National Park for visitors.
- The most popular activities among visitors are sightseeing (82%) and walking, with 67% doing a low level walk, and 43% a hill walk. In total 79% of visitors did any form of walking, either hill or low level.
- Visitors also use their trip to spend time rejuvenating, with 71% spending time on their trip just relaxing.
- 16% of visitors did any type of cycling
- First time visitors are significantly more likely to sightsee, whereas repeat visitors who have visited the National Park in the last five years, are significantly more likely to visit the National Park to participate in specific activities such as skiing (8%, compared to 5% of first time visitors), fishing (4% cf. 1%) and off road cycling (16% cf. 6%)

# The majority (93%) of visitors were able to do everything they wanted to do on their trip



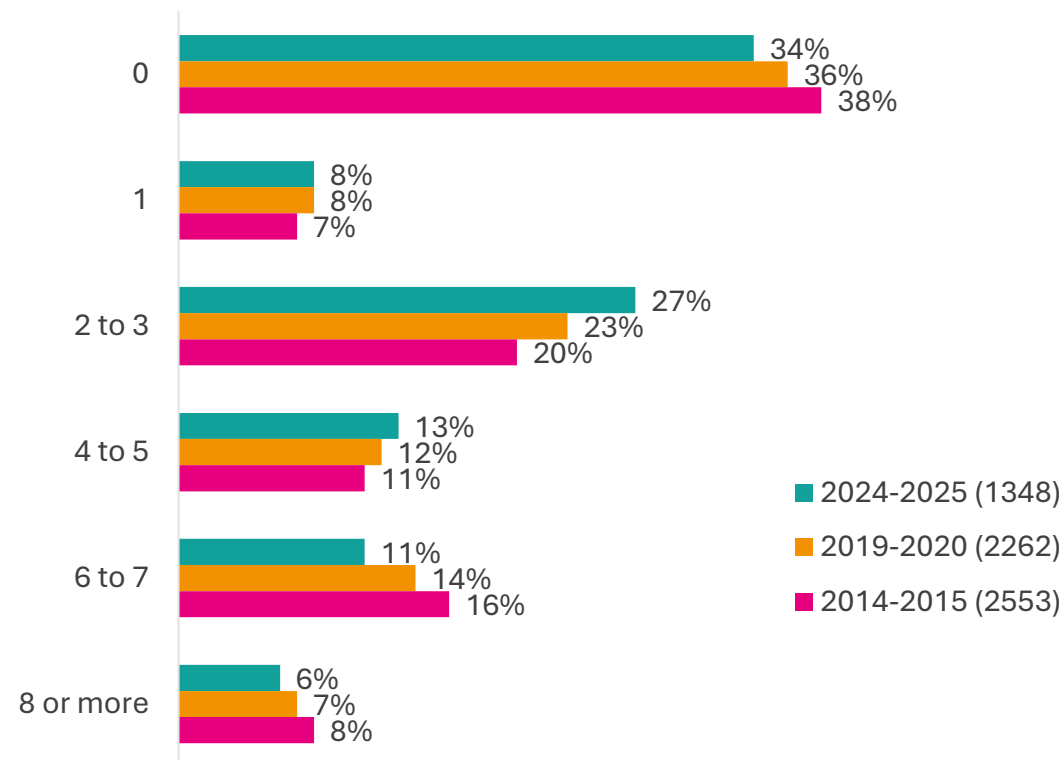
- Where visitors were not able to do, or felt they may not be able to do an activity, this usually related to not having time on the specific trip (4% of all visitors) and to a lesser extent, because activities weren't available or were fully booked (1% of all visitors).
- Among those who said they weren't able to do something because it wasn't available or because it was fully booked, the activities that they weren't able to do were:
  - Highland swing
  - Skiing / snowsports
  - Taking a train
  - Clay pigeon shooting
  - Visiting National Trust properties that weren't open on weekdays
  - Going for a coffee at a café that was full
  - Indoor swimming

# Spotlight on: Overnight Visitors



# Variations in nights stayed in the Cairngorms National Park can largely be explained by visitor origins

Number of nights stayed in the Cairngorms National Park

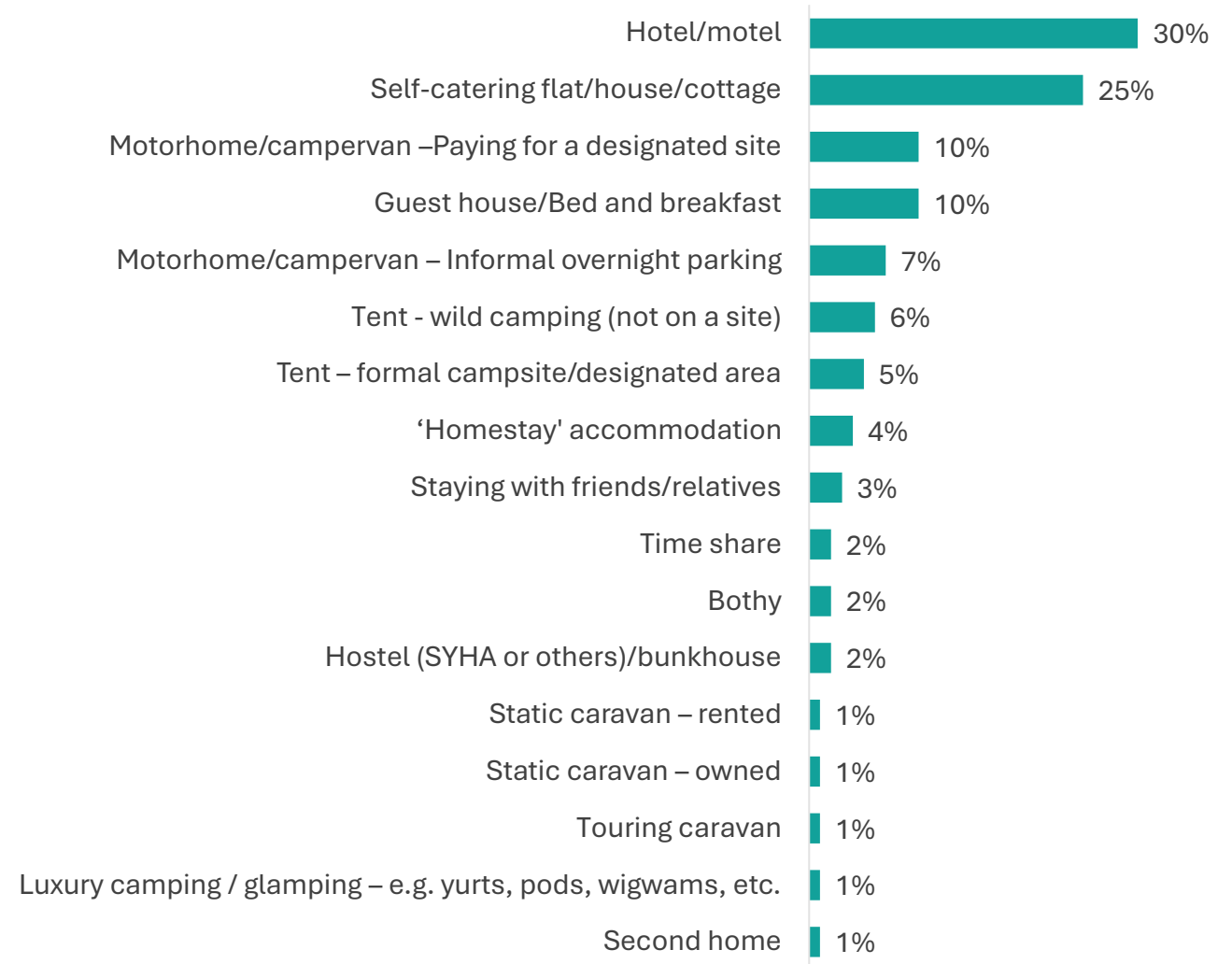


Visitors from the UK, outside of Scotland, had the longest average visit time, staying an average of 5.3 nights, compared to 3.8 among visitors from Scotland, 4.9 among visitors from Europe (excluding UK), and 4.0 among visitors from the rest of the world. Visitors travelling from other parts of Scotland are significantly more likely than other visitors to be on a day trip (43%). Visitors from outside of Europe are significantly more likely than visitors from other areas to be staying a single night in the National Park (21%), which suggests the Cairngorms National Park is one phase in a broader visit.

The average number of nights stayed was also higher among visitors aged 65+ (5.5), compared to 4.0 among those aged 16-24, and 3.99 among those aged 25-34.

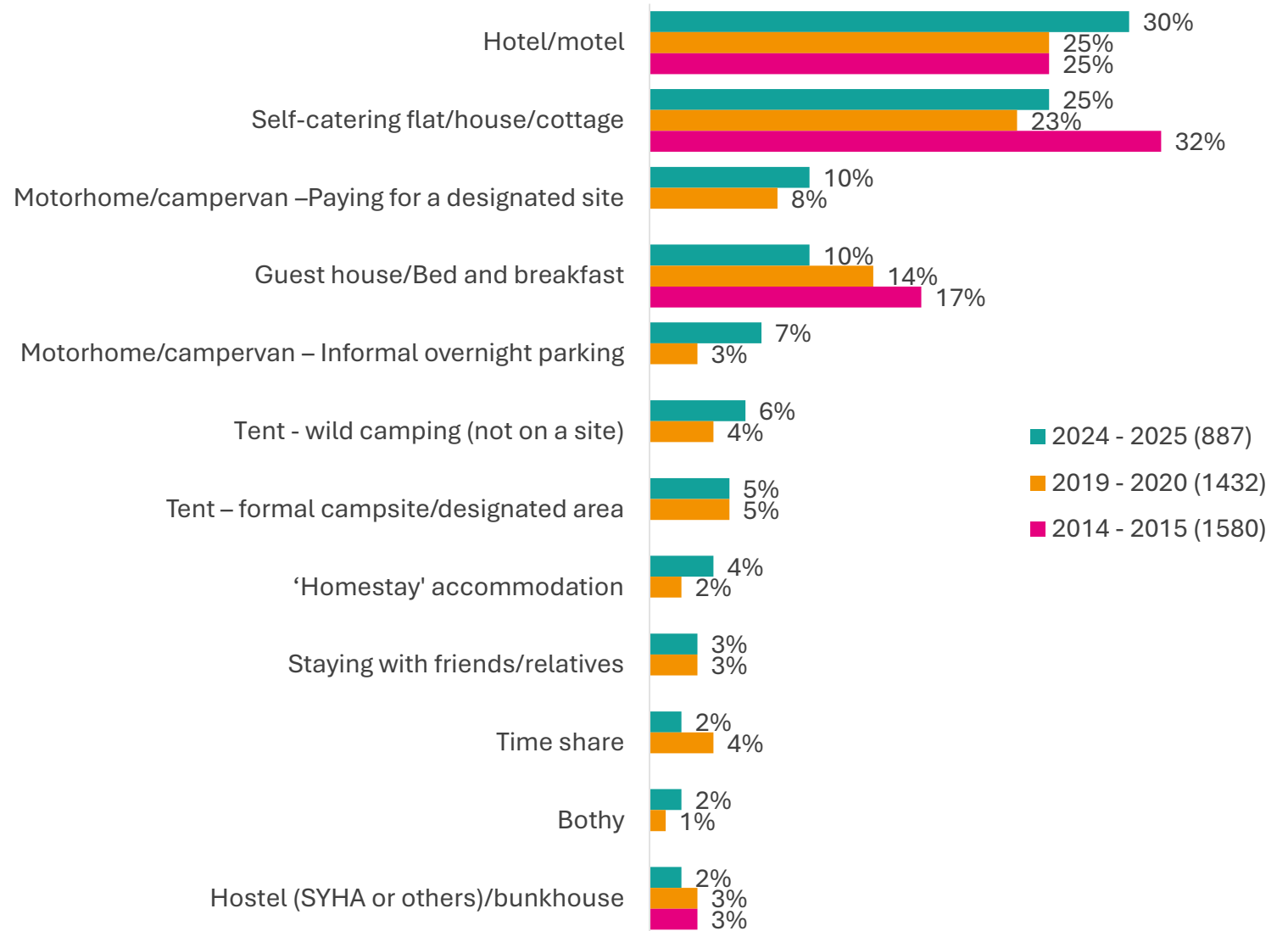
# Hotels / motels are the most popular accommodation

- First time or lapsed visitors (those who last stayed in the National Park more than 5 years ago) are significantly more likely to choose to stay in a hotel or motel (40% both) than the overall sample.
- Those who more regularly stay in the Cairngorms National Park, having stayed four or more times in the last five years, are significantly more likely to stay in self-catering accommodation (30%) than the overall sample, perhaps due to increased familiarity with the area.
- Short stay overnight visitors are more likely to stay in a hotel (37%), with visitors staying for longer periods more likely to choose to stay in self-catered accommodation (36%). Visitors from outside of Europe are more likely to stay in a hotel (67% cf. 30%), whereas those travelling from within the UK (excluding Scotland) are more likely to favour self-catered accommodation (27%).



# Hotels / motels have increased in popularity since 2014 - 2015

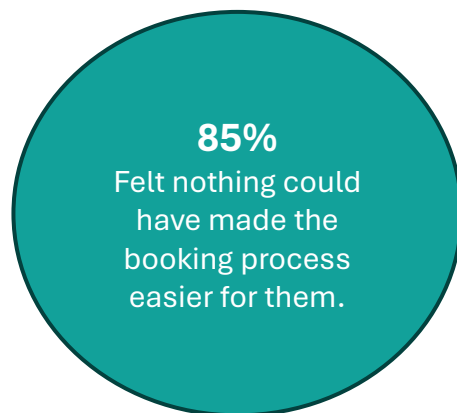
- In 2014-2015, self-catered accommodation was more frequently utilised than in 2024 – 2025 (32% cf. 225%). With the use of hotels and motels less common in 2014-2015 compared to 2024 – 2025 (25% and 30% respectively).
- In 2014-2015, camping and caravanning were aggregated (19% of visitors selected this option in 2014-15), making comparison more difficult.
- In 2019-2020, hotels / motels and self-catering accommodation were the most frequent accommodation choices, as in 2024-25.



# The majority of overnight visitors stated that there was nothing that could have made the booking process easier for them

Among those who did state there was something that could have made the process easier, the most common desire was for a greater availability of more affordable accommodation (5%) and accommodation shortages in preferred areas (3%), rather than a need for greater availability of specific types of accommodation (1%).

Satisfaction with booking accommodation is high amongst both first time and repeat visitors, although those who have visited, but not in the last 5 years, were more likely than other visitors to desire greater availability of low cost accommodation (10%) and a centralised booking system (5%).



# Satisfaction with visiting the Cairngorms National Park



# Satisfaction with their overall visit has stayed high over the past three survey waves

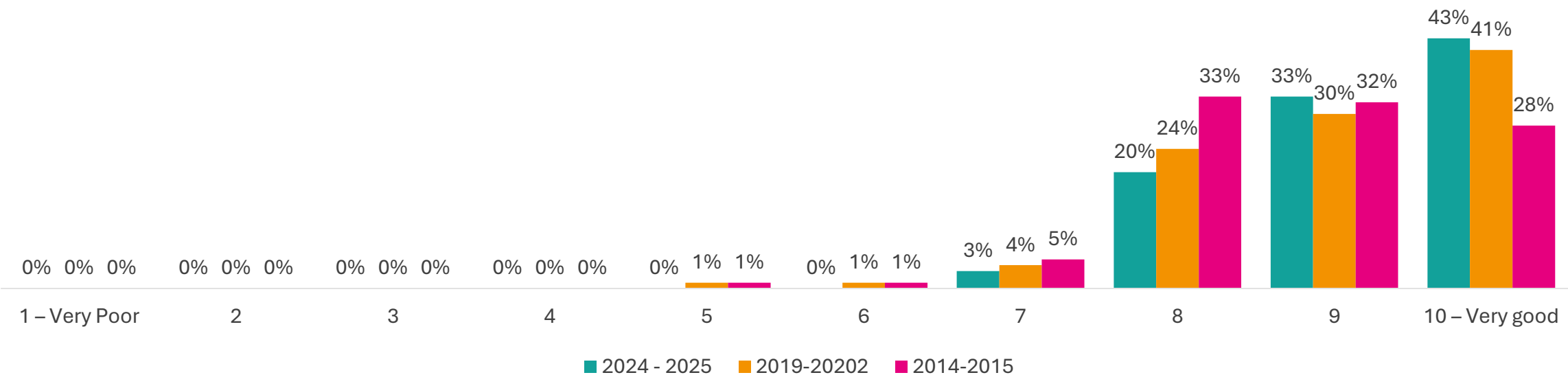
In 2019-2020, the proportion of visitors who rated their overall visit highly was 95%, demonstrating stability when compared to this survey wave. Overnight visitors are more likely to be satisfied with their visit (97%), though for day visitors satisfaction is still high (95%). Satisfaction with their overall visit is overwhelmingly high across the visitor profile, with residents the main outlier, expressing a lower level of satisfaction (89%).

## Mean Satisfaction:

2024 -25: 9.3  
2019-20: 9.0  
2014-15: 8.8

## Summary: 8 to 10

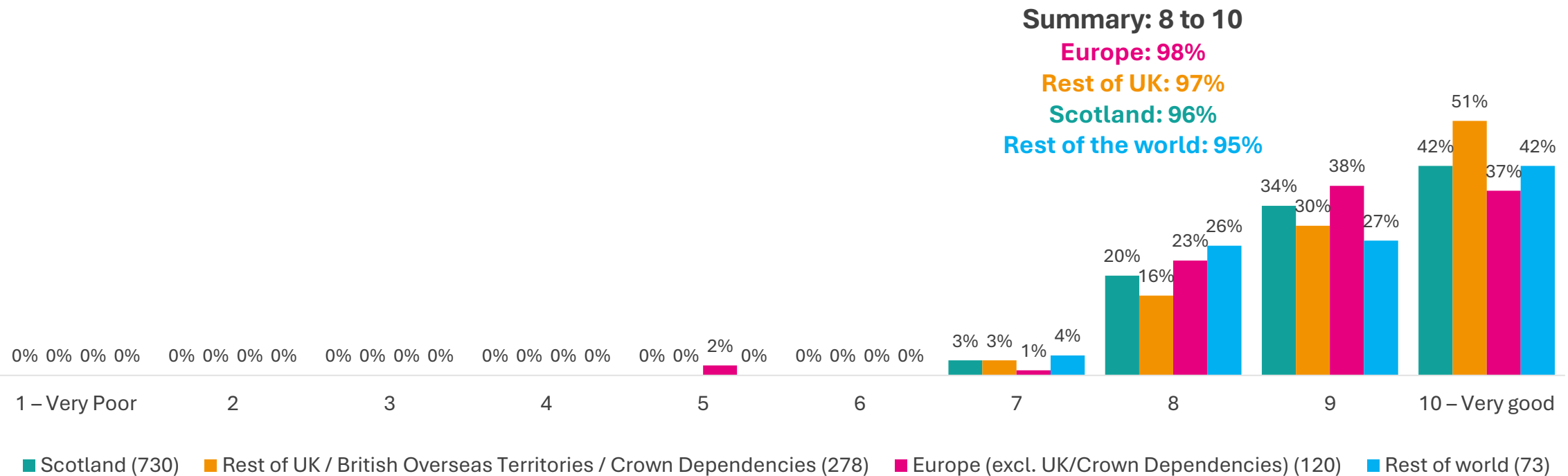
2024 -25: 96%  
2019-20: 95%  
2014-15: 93%



# Satisfaction with their overall visit is highest amongst visitors from Europe (excluding the UK) – 98%

Regardless of visitor origin, satisfaction with their overall visit is overwhelmingly high, with more than nine in ten visitors rating their visit between 8 and 10 out of 10. Visitors from the rest of the UK (excluding Scotland) are significantly more likely to describe their experience as very good (51%) when compared to other visitors.

However it should be noted that different cultures can have different perceptions of numeric weighting scales and can assign different levels of satisfaction to different numbers, therefore different results in different regions may not be reflective of different experiences of their visit to Cairngorms National Park.



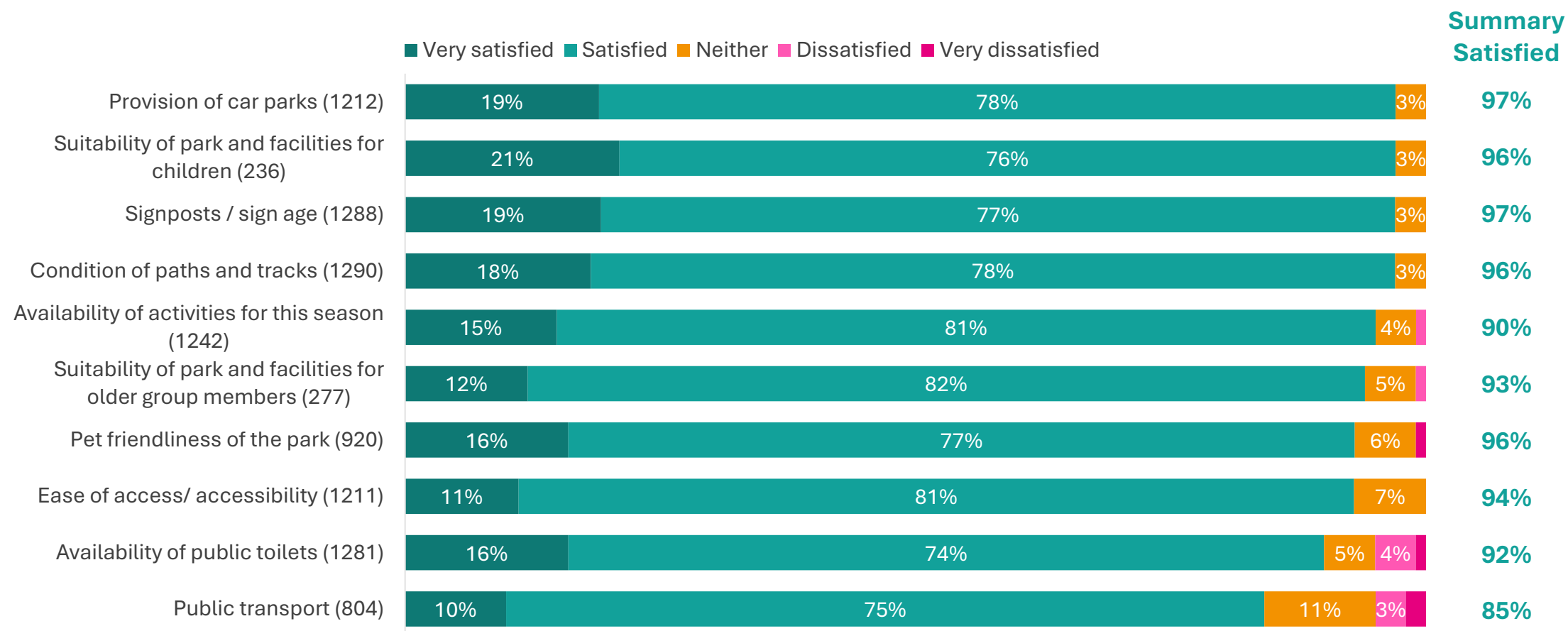
# Rating of the overall visit is consistently high across all interview areas, peaking in Perthshire (99%)

Looking by interview area, visitors still overwhelmingly rate their visit highly, with the vast majority giving it a score of eight or above. There were some visitors in the Strathspey area who gave their visit a score of three or below – though this roughly equates to 2 people, so is not a cause for concern.

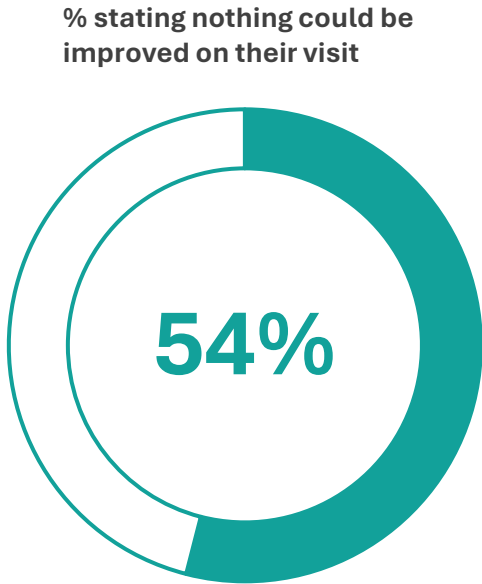
Interview Area	Aviemore (123)	Badenoch (214)	Glenmore (228)	Strathspey (170)	Moray (136)	Aberdeenshire (336)	Angus (57)	Perthshire (84)
1 to 3	0%	0%	0%	1%	0%	0%	0%	0%
4 to 7	5%	5%	3%	2%	5%	2%	5%	1%
8 to 10	96%	95%	96%	97%	95%	98%	95%	99%

# Satisfaction with park facilities and provisions is high, although there is room for improvement in the proportion who are ‘very’ satisfied

With the exception of public transport provisions (85%), more than nine-tenths of visitors are satisfied with the facilities provided in the National Park. Satisfaction is generally consistent across the seasons, though satisfaction with public transport is significantly lower during summer (81%).



When asked what could improve their trip, over half said there was nothing that could be improved, with infrastructure and transportation most commonly cited among those who did make suggestions for improvement



Most common themes among those who wrote in an improvement that could be made:

Infrastructure & Facilities (16%)

Frequent mentions of public toilets, bins, and basic amenities.  
Requests for better signage, cleaner facilities, and more accessible locations.  
Need for accessible paths.  
A general desire for more facilities to be open

Transportation (13%)

Comments on parking issues, especially in busy areas like Aviemore and Loch Morlich.  
Suggestions for improved public transport, including bus timetables and connections.  
Desire for better quality roads and removal of pot holes in roads

Natural Environment (5%)

Calls to preserve the natural feel to the area.

Accommodation improvements (4%)

Desire for more campervan sites, waste disposal points, and picnic areas.  
Greater availability of campsites and Aires.  
Better availability of cost effective accommodation.

Season specific and weather (2%)

A desire for different or better weather to that experienced by visitors.  
Requests for more snow in ski areas.  
Desire for year-round access and longer opening hours for shops and cafes.

# When asked what could improve their trip, many cited a desire for more infrastructure, more open facilities and improved transportation options

## Infrastructure & Facilities

“Better, cleaner, open toilet facilities.”  
“More bins for campers to drop rubbish and clean toilets are a must.”  
“Accessible toilets that are open, everything else is perfect.”  
“More picnic benches, more resting places or benches to help older and disabled people.”  
“More places open all year round, for food, everything else is fine.”  
“Need more places for lunch in Ballater, needs more info on places that are open, when it states open and it's closed.”

## Transportation

“Aviemore needs more parking, restaurants need more variety.”  
“Better car parking in different areas, better sign posted disabled spaces.”  
“Public transport links need smaller buses.”  
“Bus fare from Ballater to Balmoral £23; we took the car instead.”  
“Local bus timetables need connecting better, and more of local access buses especially during peak season.”  
“Cycle trails on A roads, more off connecting the different places.”  
“Road conditions need improved upon and 20 mph needs looking at.”  
“Pot holes need to be repaired, more signs for bad corners.”

## Natural Environment

“Keep it wild, no over developing.”  
“Don't improve too much as you ruin it.”  
“Come back every year for the calm and beauty, don't change.”  
“Keep wind turbines out, more Aires, we need to embrace the camping culture.”

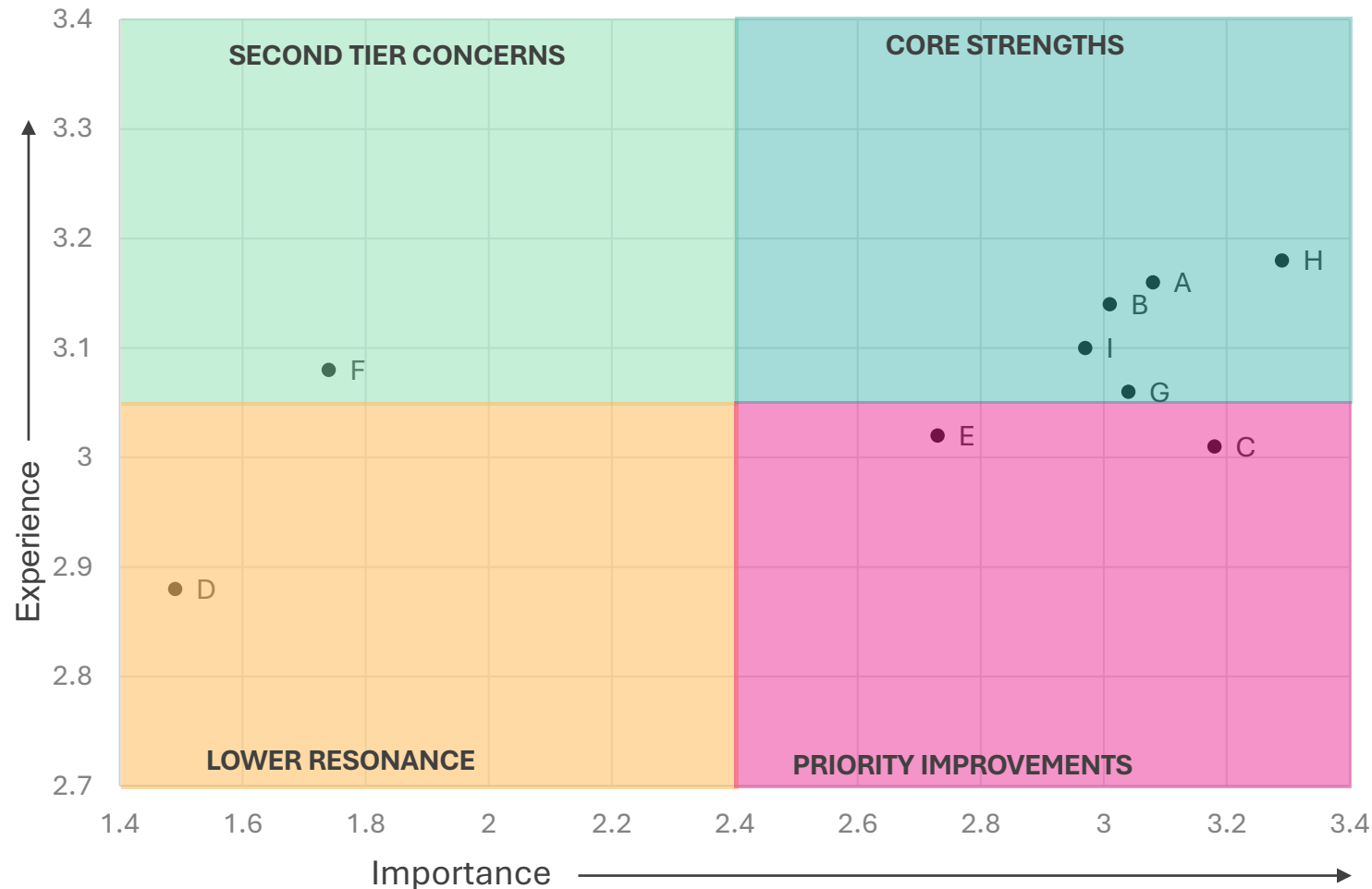
## Accommodation Improvements

“More Aires for campers and permit system.”  
“More budget friendly accommodation, would be good.”  
“More campervan facilities, for brown waste, Aires and official sites needed with basic facilities.”  
“More overnight parking for campervans.”

## Season Specific and Weather

“More snow please!”  
“Better weather.”  
“More facilities in winter, everywhere we've been needs better winter facilities.”  
“More snow cannons in the Lecht.”

# The National Park is delivering on most of the services and facilities that are most important to visitors, although the availability of public transport, and the pet friendliness of the National Park, lag slightly behind



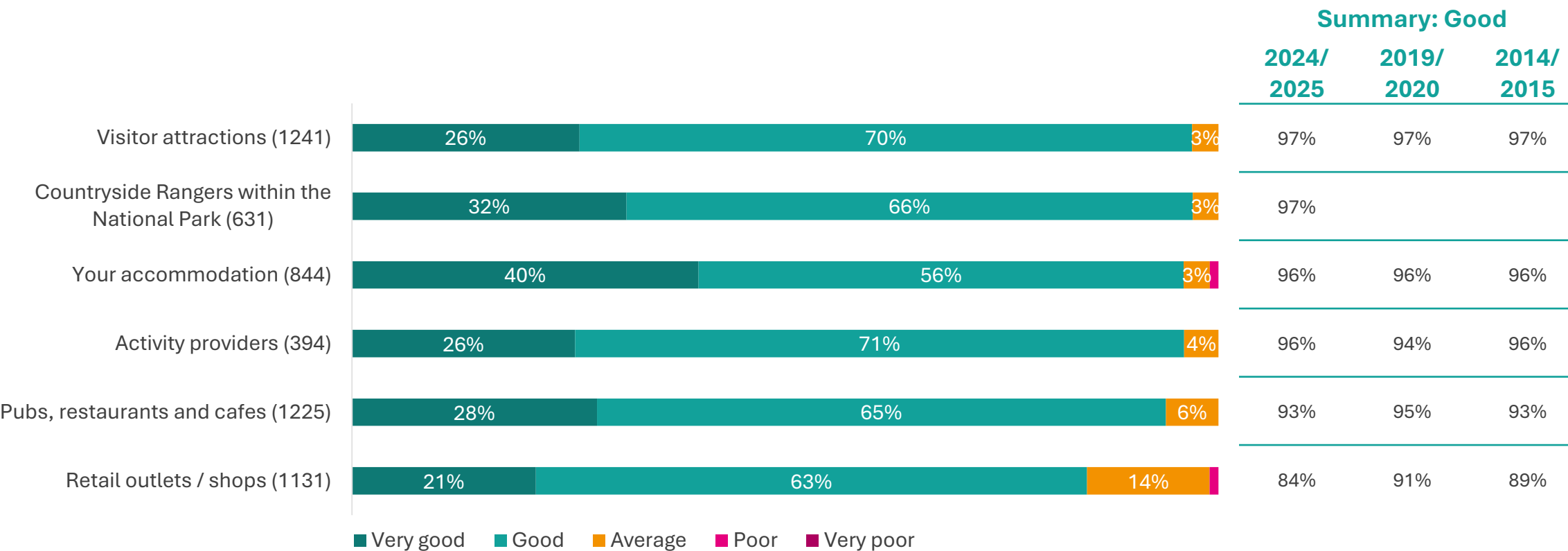
A	Provision of car parks
B	Condition of paths and tracks
C	Availability of public toilets
D	Public transport
E	Ease of access/ accessibility
F	Pet friendliness of the National Park
G	Suitability of park and facilities for older group members**
H	Suitability of park and facilities for children**
I	Availability of activities for this season

\*Note when looking at only those who visited the National Park with a pet, the importance of the pet friendliness of the park rises to 3.35, and the experience to 3.2

\*\*These options were only asked to visitors who attended with older group members or children

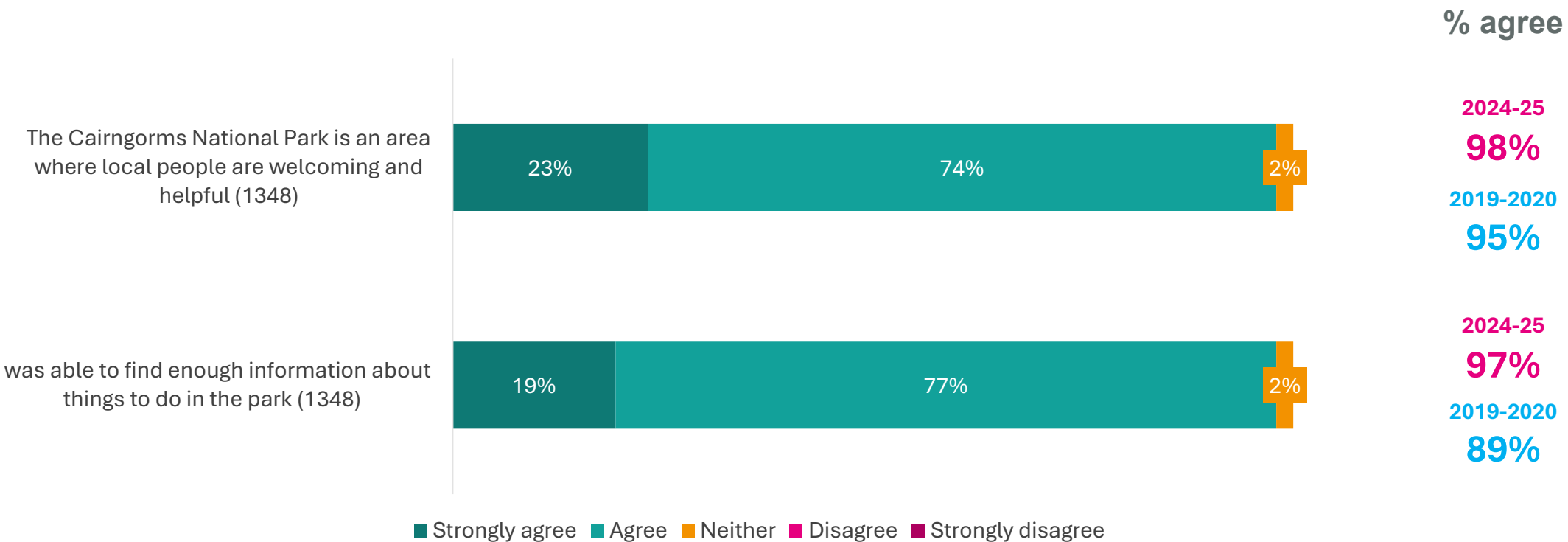
# Satisfaction levels with the customer service received in the park are high, similar to previous years

Staff at visitor attractions (97%) and Countryside Rangers (97%) are particularly noted as providing good customer service. It is staff working at accommodation that are most likely to have provided “very good” customer service (40%). Only satisfaction with the service received in retail outlets has declined compared to previous years (84% compared to 91% and 89%).



# Most visitors agree that the local people in the Cairngorms National Park were welcoming and helpful, and the vast majority of visitors were able to find enough information about things to do

First time visitors, and those who stayed in the National Park for over seven nights were more likely than other visitors to strongly agree that local people are welcoming and helpful (28% and 25%). Compared to 2019 – 2020 there has been an uplift in both belief that the locals are welcoming and helpful, and that they were able to find enough information about things to do in the park.



# Most visitors report feeling welcome in the National Park, and that responsible visitor behaviour was observed and promoted

First time visitors were particularly likely to strongly agree that it was clear how to be a responsible visitor to the countryside (23%) and that other visitors they witnessed within the National Park were behaving responsibly (25%). Disagreement that other visitors were acting responsibly was slightly higher in the Glenmore interview area (3% compared to the overall (1%).

Visitors living in Scotland (77%) were most likely to agree they would consider making a voluntary donation, only 10% of visitors from Scotland 'strongly' agreed with this statement. First time visitors were more likely than other visitors to 'strongly' agree (15%) that they would consider making a donation.

