



progressive



Cairngorms Visitor Survey 2014-15

Presentation of Findings

FULL REPORT

1st July 2015

Background

- The Cairngorms National Park was established in 2003 and is one of Scotland's two National Parks (the other being Loch Lomond & The Trossachs National Park).
- In order to ensure a sustainable future for the Parks, the National Park Authority co-ordinates the delivery of four statutory aims:
 1. To conserve and enhance the area's natural and cultural heritage
 2. To promote the sustainable use of the area's natural resources
 3. To promote understanding and enjoyment of the Park's special qualities
 4. To promote sustainable economic and social development of local communities
- To make sure these aims are met, the bodies responsible for the parks' management require information regarding visitor profile and behaviour, volumes of use, visitors' knowledge and attitudes, and the impacts of information provided to visitors.
- Previous Visitor Surveys have been conducted at each National Park – in 2003/04 and again in 2009/10.
- Both National Parks commissioned further visitor research in 2014/15 to continue to inform the sustainable management of the parks.

Research objectives

To understand visitors to the Cairngorms National Park, in terms of their profile, visiting behaviour and visitor experience.

The four specific objectives of this study are:

1. To supply information about visitors and their type of visit, in order to guide future tourism policy and activity – this is achieved through establishing:
 - Visitor behaviour
 - Visitor experiences
 - Visitor perceptions
 - Visitor expectations
2. To gather data which can be replicated to enable changes to be tracked over time
3. To analyse and compare with previous Visitor Surveys and between the two National Parks*
4. To collect information which can be used to assist in the production of estimates of the volume and value of visitors to the overall National Park area, as well as key sub areas

This report presents findings from the Cairngorms National Park visitor survey for the full year (May 2014 – April 2015).

Method

- Quantitative research was conducted
- Face-to-face interviews using CAPI technology
- Year-long visitor survey conducted from May 2014 – April 2015
 - Overall target sample size = 2,500 interviews
- Sample size targets were set each month to ensure a good spread across the year
- 30 sample points were used, to match the points used in previous surveys
- Random sampling – no quotas set
 - To ensure accurate visitor profile
- **Final sample achieved = 2,553**
- The margin of error for the total sample is $\pm 0.39\%$ to $\pm 1.94\%$
 - Sub sample margins of error vary with sample size

Analysis and reporting

- Data has been analysed by various cross-breaks, such as visitor type and origin.
- Analysis has also been conducted by geographical areas within the Park.
- Seasonal analysis compares data from Spring (March & April 2015, May 2014), Summer (June, July, August 2014), Autumn (September, October, November 2014) and Winter (December 2014 & January, February 2015).
- The National Park is also interested in trends since the previous surveys (conducted in 2009/10, and 2003/04). Data has been compared and significant differences highlighted where relevant in this report.
- Differences are highlighted in this report only where they are statistically significant.

Sample distribution – month and day of the week

Day of the Week	Sample Achieved	% of sample
Monday	459	18%
Tuesday	312	12%
Wednesday	472	18%
Thursday	235	9%
Friday	405	16%
Saturday	431	17%
Sunday	239	9%
TOTAL	2553	100%

Month	Sample Achieved	% of sample
May 2014	257	10%
June	277	11%
July	390	15%
August	366	14%
September	229	9%
October	210	8%
November	65	3%
December	91	4%
January	117	5%
February	154	6%
March	137	5%
April 2015	260	10%
TOTAL	2553	100%

Schedule of interviewing replicated previous surveys to ensure comparability of findings. Interviewing also focused on peak visitor months. There was a lower proportion of interviews conducted at the weekends in 2014-15 than in the previous survey (45% compared to 26% this year).

Sample distribution – by area

AVIEMORE	Sample	%
Aviemore, main street	263	10%
TOTAL	236	10%
GLENMORE	Sample	%
Rothiemurchus Car Park	75	3%
Loch an Eilein	51	2%
Loch Morlich/Glenmore Centre & Café	49	2%
Cairngorm Ski Centre	174	7%
Glenmore Road End	42	2%
TOTAL	391	15%
BADENOCH	Sample	%
Laggan Wolftrax	74	3%
Ralia - car park	42	2%
Highland Folk Museum, Newtonmore	57	2%
Kingussie - main street	65	3%
Kincraig Highland Wildlife Park	69	3%
TOTAL	307	12%
MORAY	Sample	%
Glenlivet Distillery Car Park	67	3%
Tomintoul - village centre	70	3%
Lecht Ski Area	88	3%
TOTAL	225	9%

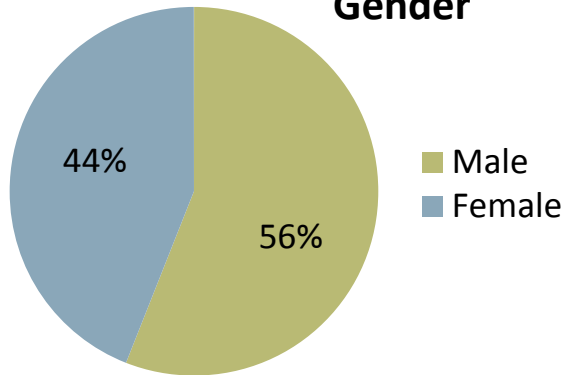
STRATHSPEY	Sample	%
Landmark Centre, Carrbridge	127	5%
Speyside Heather Centre	61	2%
Osprey Centre Car Park	50	2%
Grantown on Spey - main street	110	4%
TOTAL	348	14%
DEESIDE	Sample	%
Ballater - village centre/TIC	184	7%
Loch Muick Car Park	55	2%
Balmoral Car Park	68	3%
Royal Lochnagar Distillery Car Park	55	2%
Braemar - village centre	164	6%
Linn of Dee Car Park	47	2%
Glenshee	120	5%
Burn o'Vat Car Park, Dinnet	50	2%
Glen Tanar Car Park	49	2%
TOTAL	792	31%
ANGUS	Sample	%
Glen Esk Car Park	51	2%
Glen Doll/Clova Car Park	51	2%
TOTAL	102	4%
ATHOLL	Sample	%
Blair Atholl - village square	125	5%
TOTAL	125	5%

Sampling was spread across key visitor areas in the Park. The variety of sampling points ensures that all types of visitors were included. These 8 areas have been used in the analysis to compare findings across the Park.

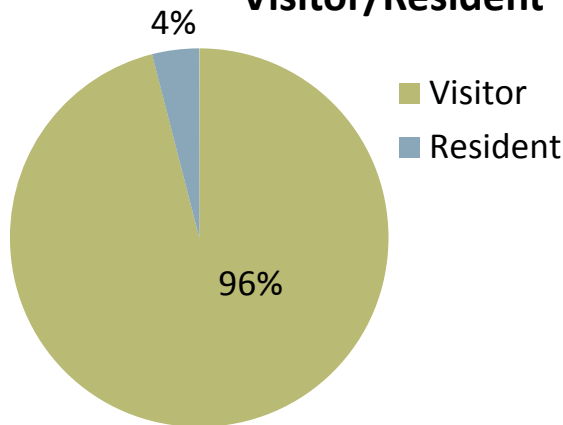
Visitor profiling

Profile: residence, gender and age

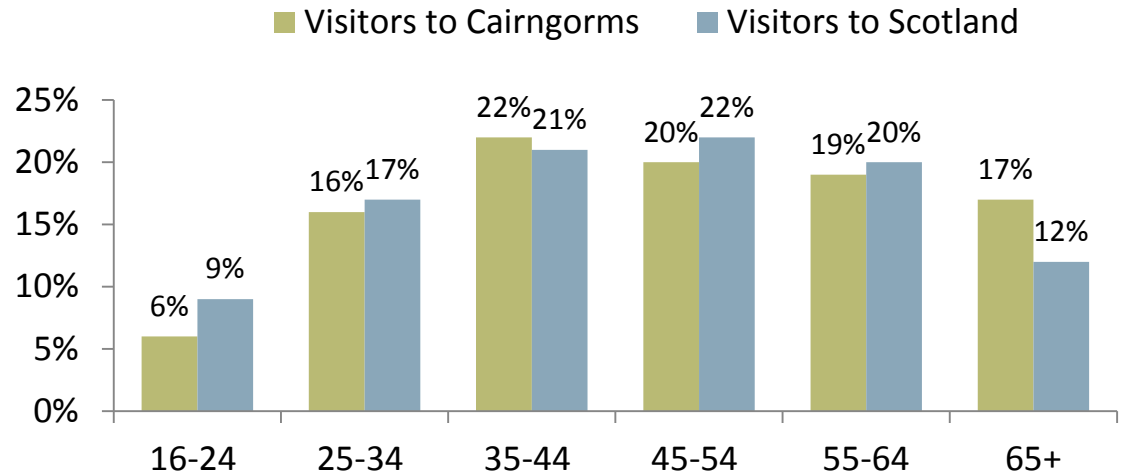
Gender



Visitor/Resident



Age



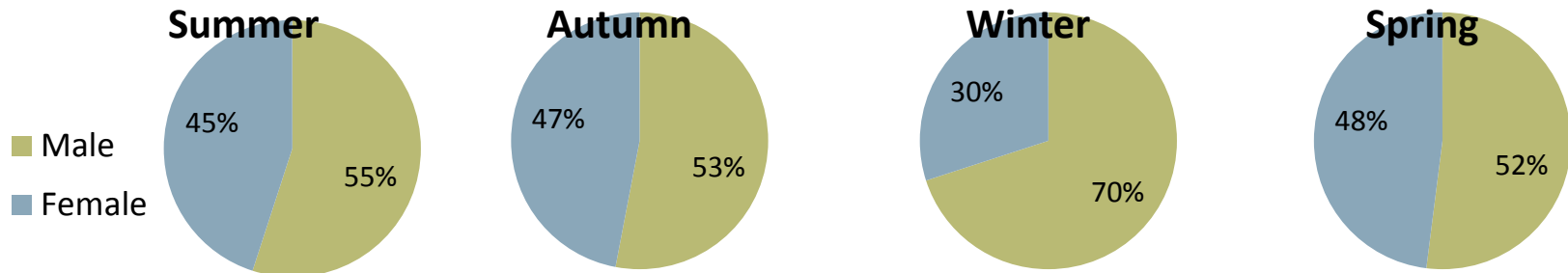
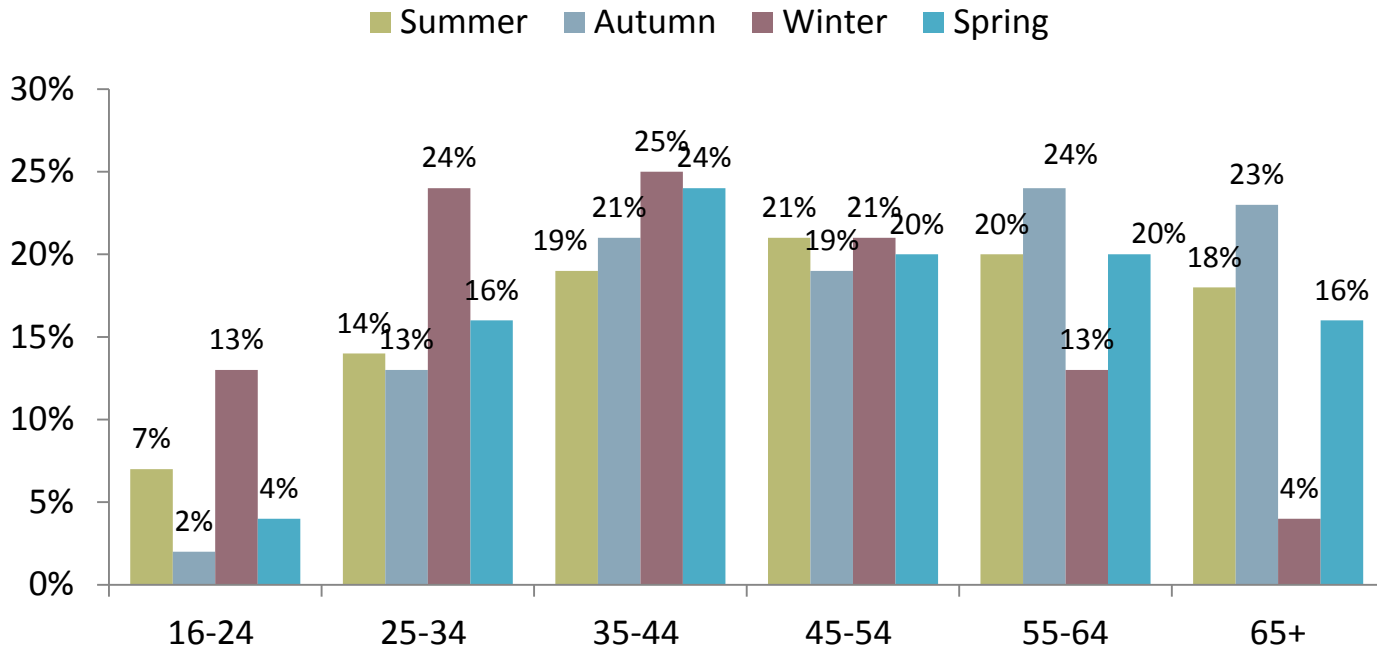
Visitors are slightly more likely to be male than females – perhaps reflecting the range of active pursuits on offer. The Park attracts a good range of age groups with a peak in 25 to 54 year olds. These age groups correspond very closely to the profile of visitors to Scotland as a whole*.

Visitors to Angus were more likely than other areas to be male (69%), whereas visitors to Strathspey were more likely to be female (55%).

The largest proportion of residents lived in the West of Cairngorms / Spey Valley (53%). A further 29% lived in East of Cairngorms / Deeside / Tomintoul and 18% lived in the South of Cairngorms / Blair Atholl Glemshee area.

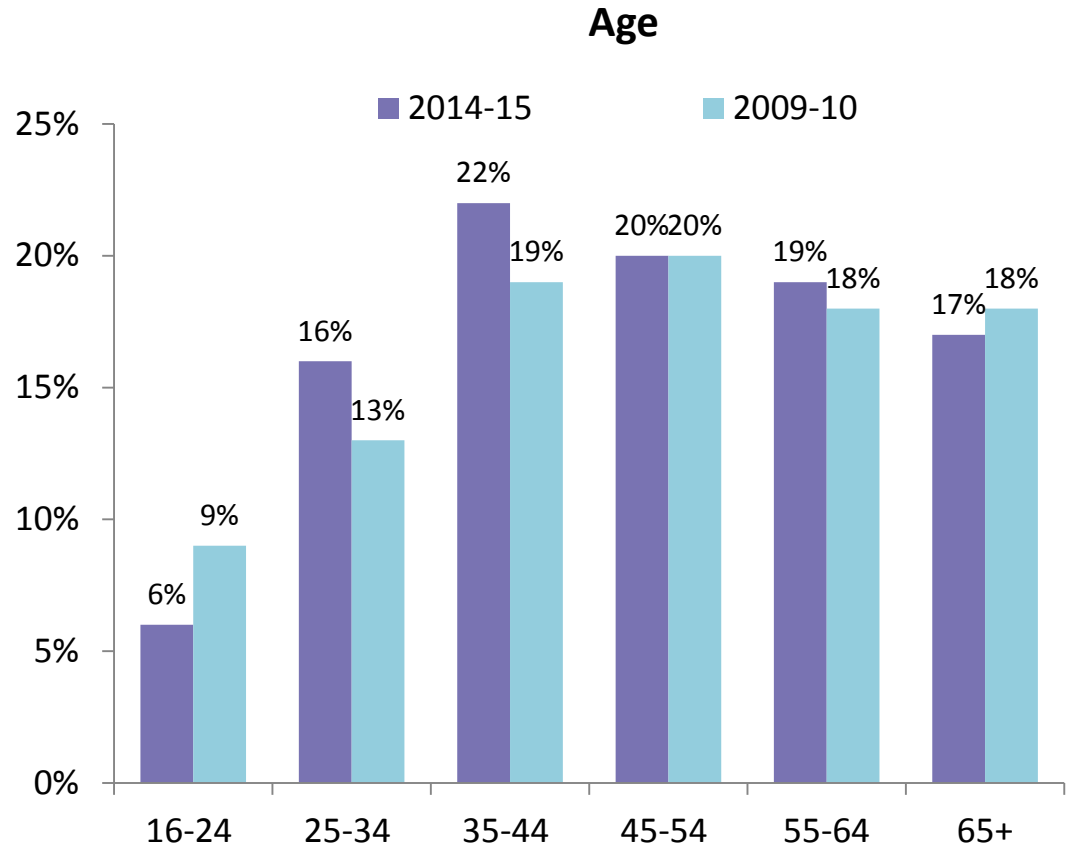
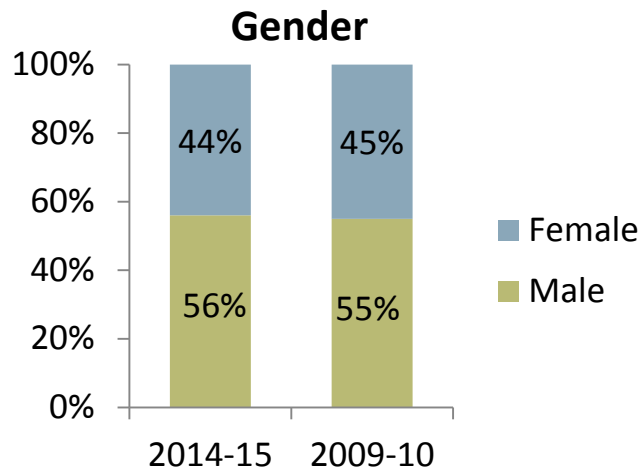
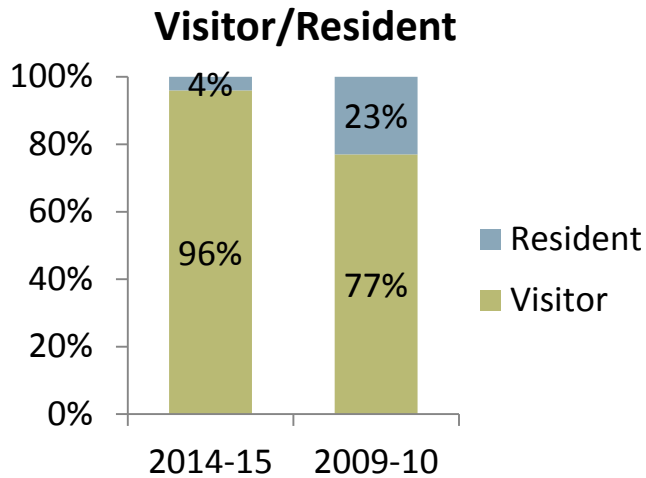
*source: VisitScotland Scotland Visitor Survey 2012

Age and gender – by season



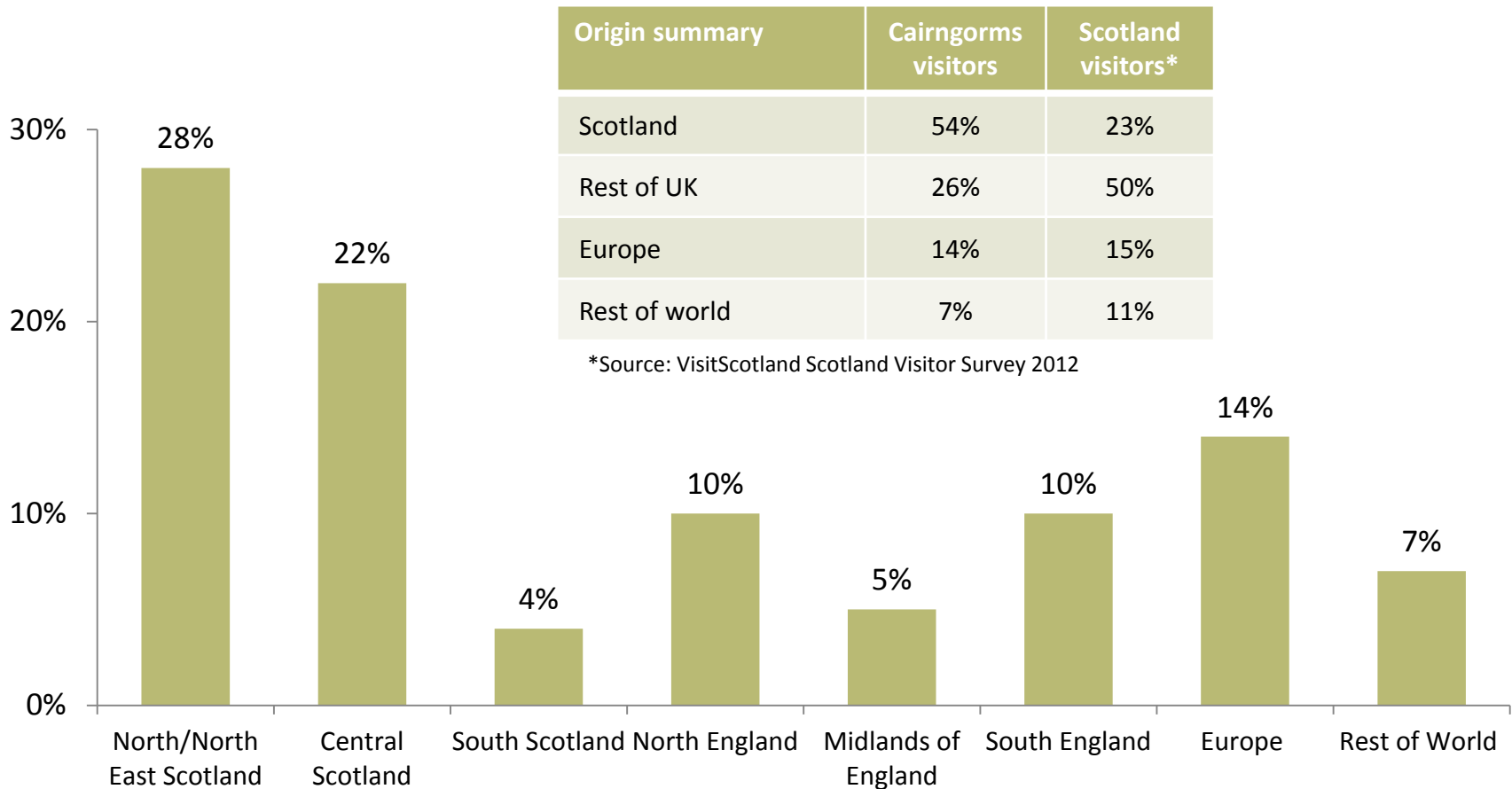
The profile of visitors in Summer and Spring are similar – slight weighting to males, and spread of ages with the majority between 35 to 64 years. Winter shows a spike in male visitors and younger age groups (16 to 44 years). Autumn visitors are more likely to be in older age groups (55+) than at other times of year.

Residence, gender and age – by year



Demographic profiling data was similar in 2014-15 compared to 2009-10 in relation to age and gender. However, the resident / visitor profile was different – 23% were residents in the 2009-10 survey, compared to 4% in 2014-15.

Profile: origin of visitors



Origin summary	Cairngorms visitors	Scotland visitors*
Scotland	54%	23%
Rest of UK	26%	50%
Europe	14%	15%
Rest of world	7%	11%

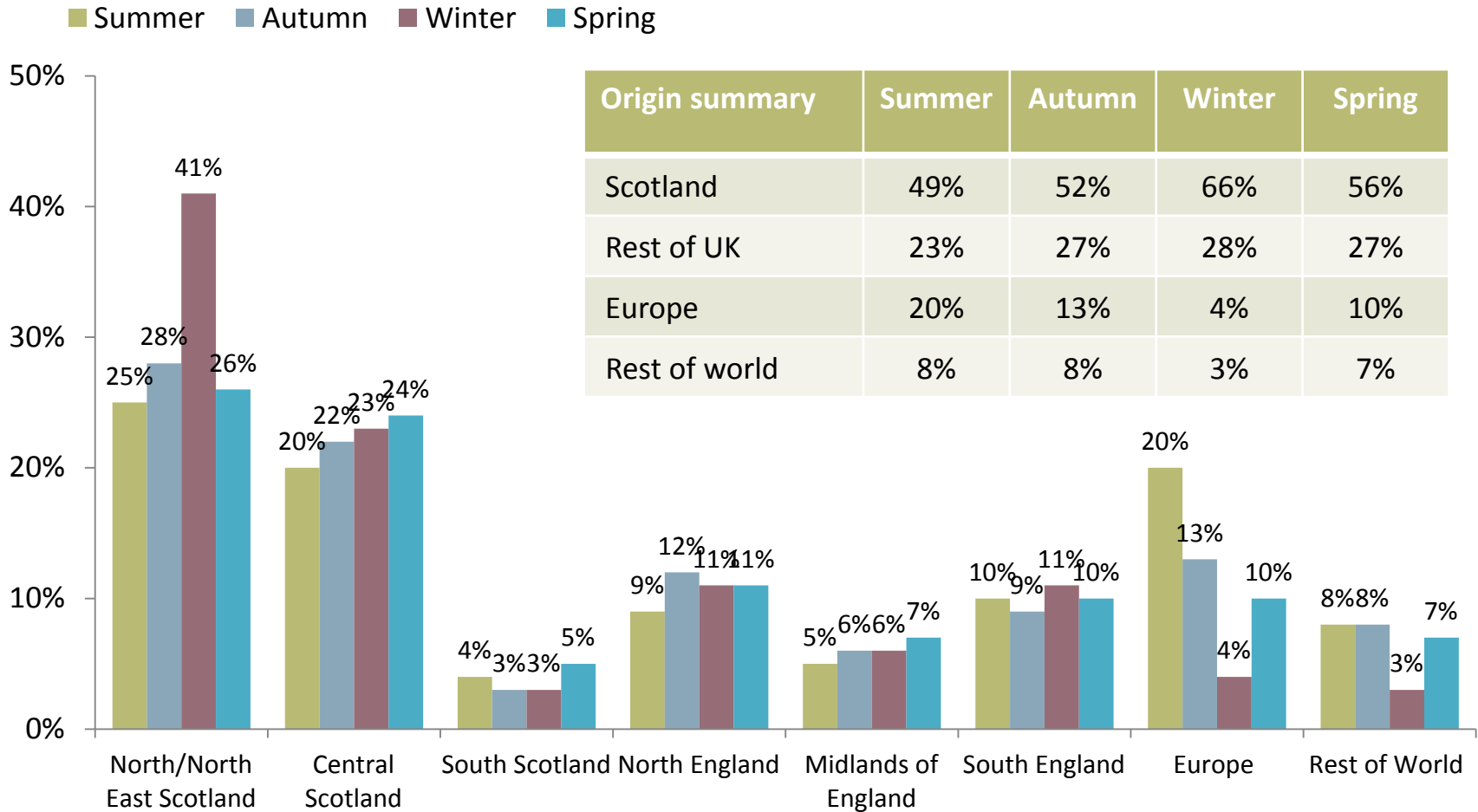
*Source: VisitScotland Scotland Visitor Survey 2012

More than half of visitors are from Scotland – with 28% from the nearby areas of the North and North East of Scotland. Compared to Scottish visitors statistics, the Cairngorms attracts a higher proportion of visitors from Scotland and a lower proportion from the rest of the UK.

Profile: origin of visitors

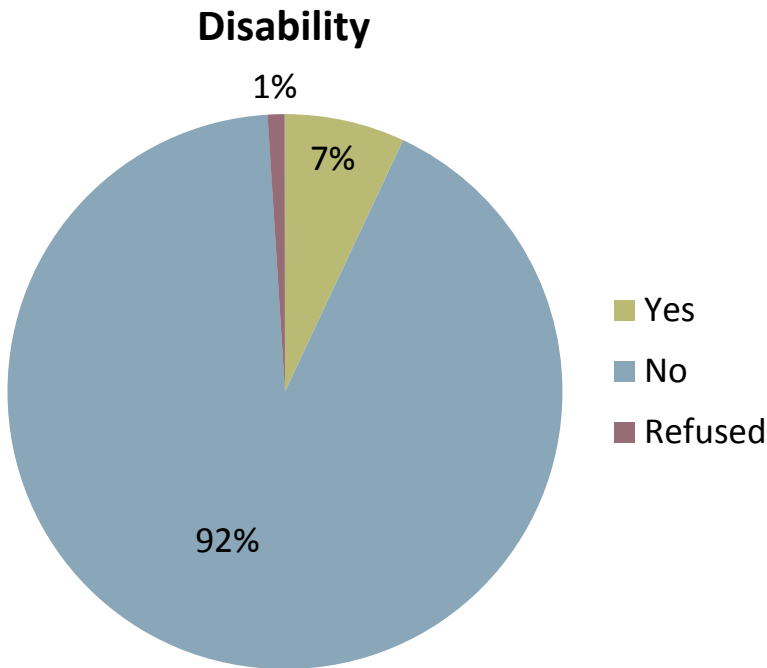
- The origin of visitors differed significantly by area:
 - 77% of visitors to Angus were from Scotland (average = 54%).
 - 38% of visitors to Aviemore were from elsewhere in the UK (average = 26%).
 - 59% of visitors to Moray were from overseas (average = 21%) – mostly visiting Glenlivet Distillery and Tomintoul.

Origin of visitor – by season



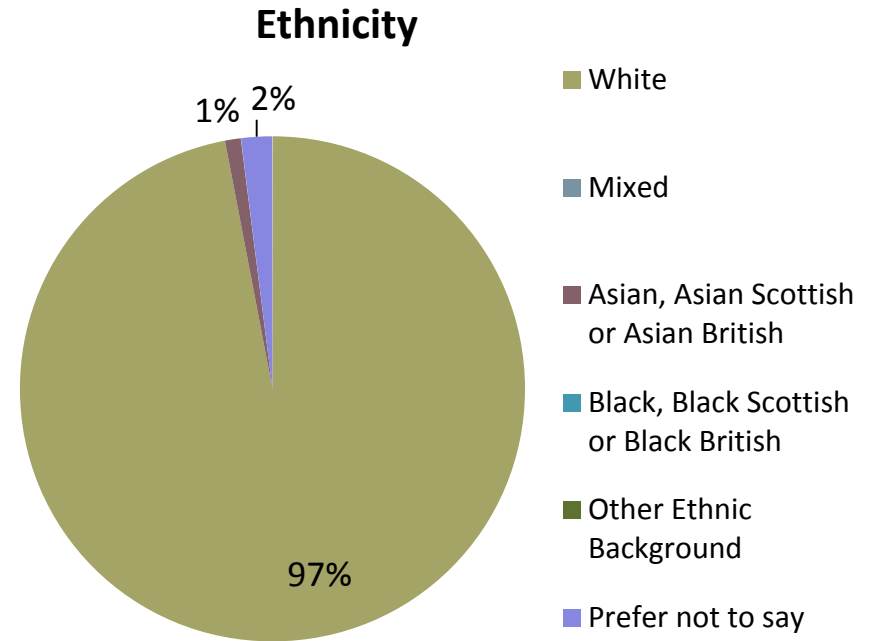
Visitors from Scotland peaked in the Winter months – particularly those coming from the nearby areas in the North and North East. Overseas tourists tend to come to the Cairngorms in Summer and Autumn.

Profile: disability and ethnicity



Lower than the Scottish national average (20%)*.

*Source: 2011 Census data



Similar to the Scottish national average (96% White)*.

*Source: 2011 Census data

Profile: working status & social grade

Working status	%
Working – full time	60%
Working – part time	7%
Self-employed	3%
Unemployed	0%
Retired	22%
Looking after home / family	2%
Permanently sick or disabled	0%
Student	4%
Refused	2%

Social Grade	%
AB	31%
C1	45%
C2	15%
DE	3%
Refused	6%

Visitors to the Cairngorms are more affluent than the national average (51% ABC1 and 49% C2DE)*.

*Source: 2011 Census data

Socio-economic groups were broadly consistent across the seasons.

There were no significant differences in where ABC1s visited; however, a higher proportion of C2DE visitors visited Badenoch than other areas.

Working status & social grade – by year

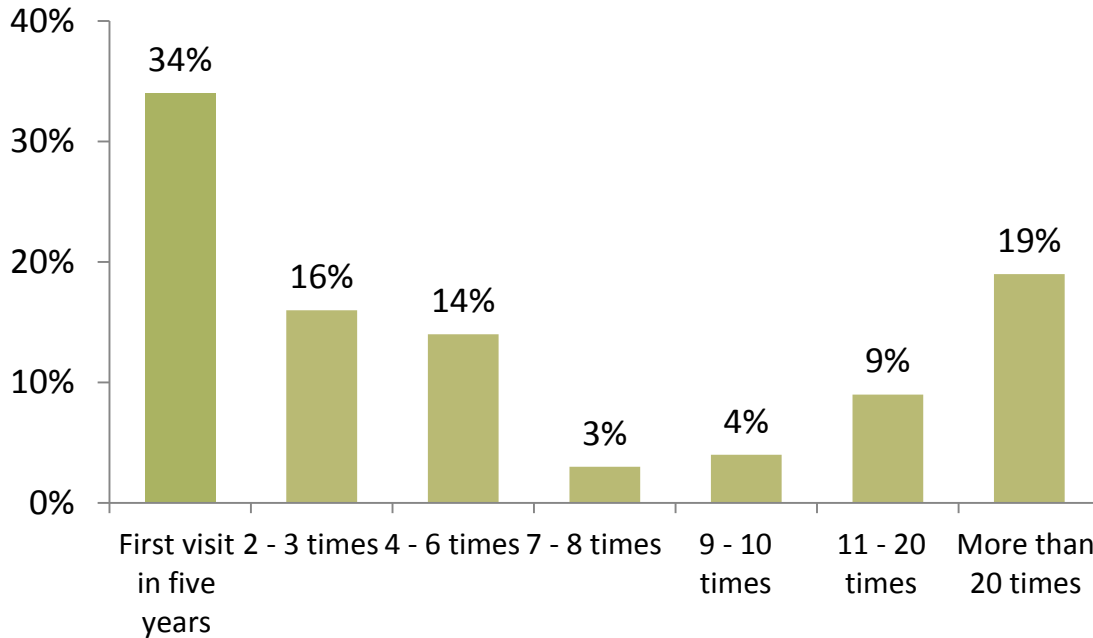
Working status	2014-15	2009-10
Working – full time	60%	56%
Working – part time	7%	10%
Self-employed	3%	N/A
Unemployed	0%	1%
Retired	22%	22%
Looking after home / family	2%	2%
Permanently sick or disabled	0%	N/A
Student	4%	5%
Refused	2%	-
Other	N/A	3%

Social Grade	2014-15	2009-10
AB	31%	24%
C1	45%	41%
C2	15%	25%
DE	3%	10%
Refused	6%	-

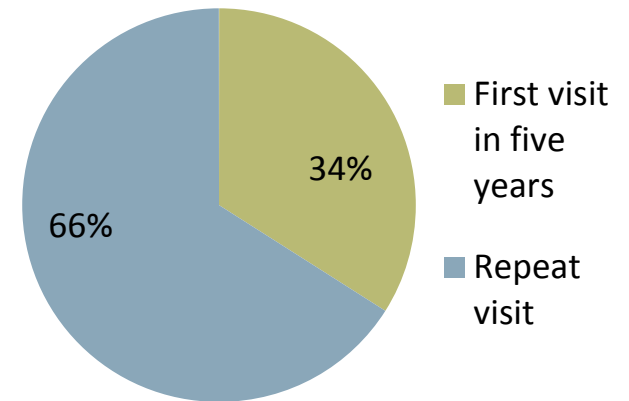
Social grade: In 2014-15, respondents were more likely to be within the higher socio-economic group – 76% fell into the ABC1 group compared to 65% in 2009-10.

Working status: Responses were very similar in terms of working status between the two surveys. [NB response options were slightly different in the previous survey]

Number of times visited



First and Repeat Visitors

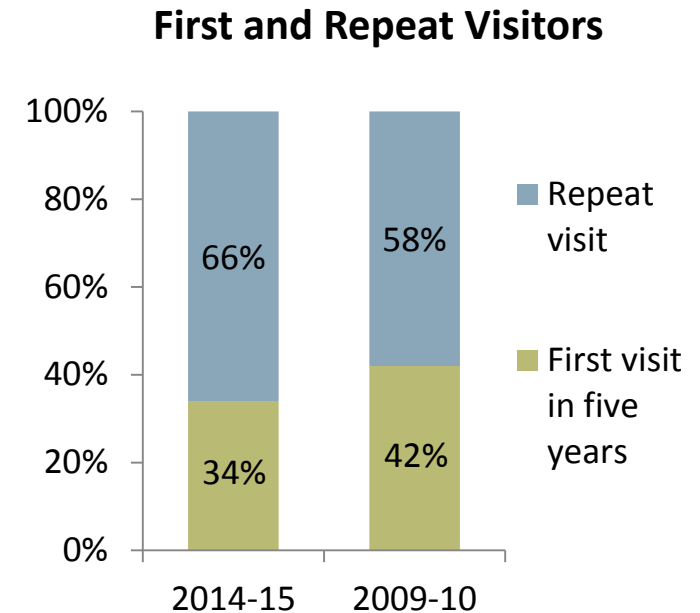
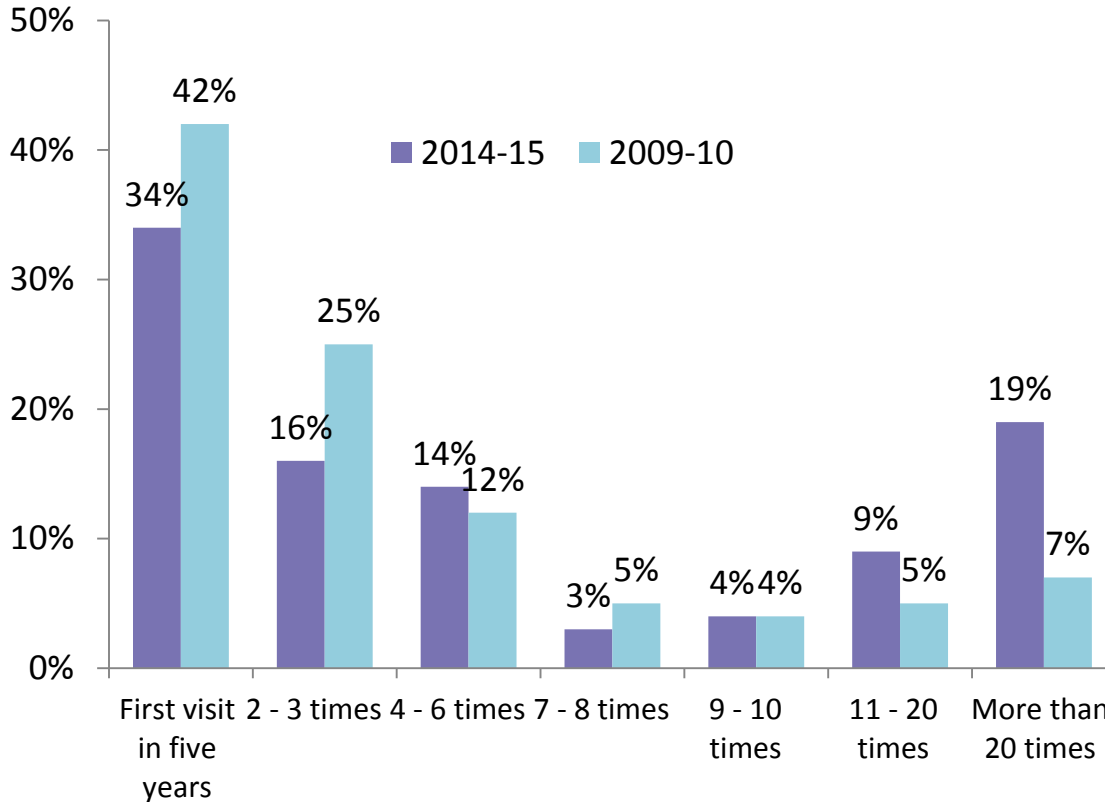


A high proportion of visitors are repeat visitors – this indicates that the Cairngorms delivers a good visitor experience motivating people to return time and again. Almost one fifth have been more than 20 times in the last five years, indicating at least four visits per year.

There was a higher proportion of repeat visitors in Winter (76%). First time visitors were most common in Summer (39%).

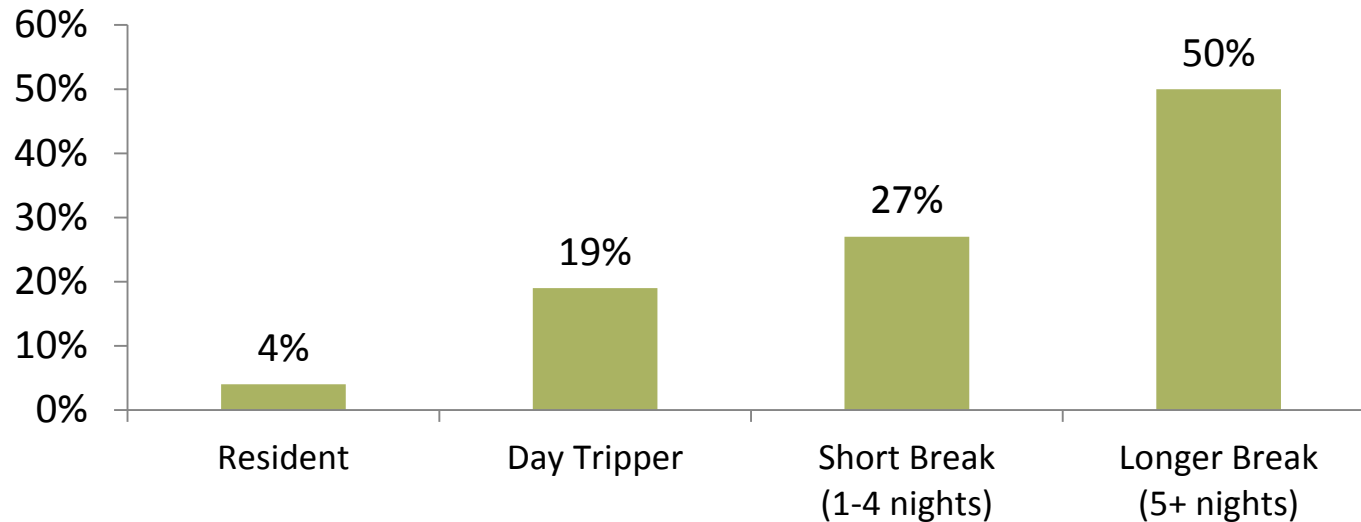
Moray saw a higher proportion of first time visitors than other areas (54%) – not surprising given the large amount of overseas visitors to Moray. Angus saw a high proportion of repeat visitors (78%).

Number of times visited – by year



Visitors in 2014-15 were more likely to be repeat visitors than in the previous survey – 66% had visited in the last 5 years compared to 58% in 2009-10. They were also more likely to have visited a large number of times (28% had been at least 11 times, compared to 12% in the previous survey).

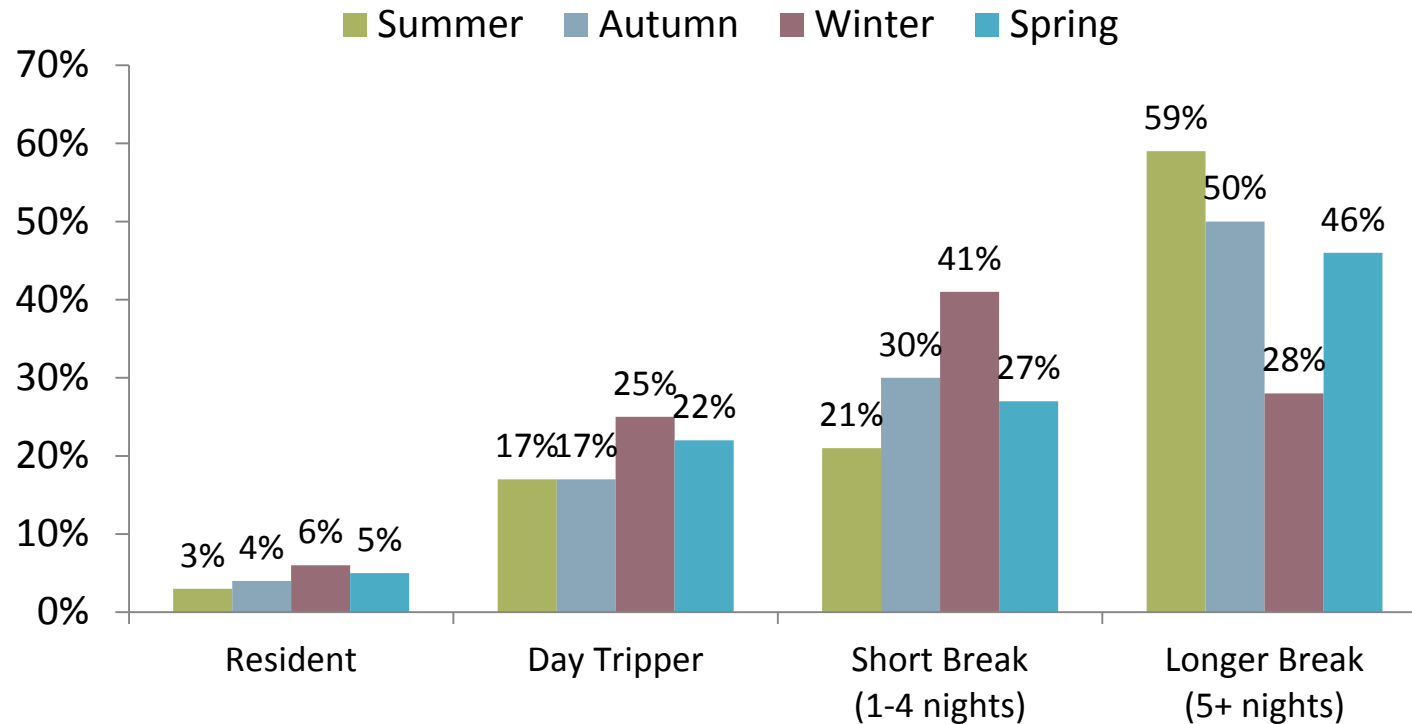
Type of visitor



Around a fifth of visitors were day visitors and 4/5 were overnight visitors, with 50% staying for more than 5 nights → Cairngorms is a location that people want to spend a longer period of time during visit. Findings will also be influenced by remoteness and the time taken to travel to the area.

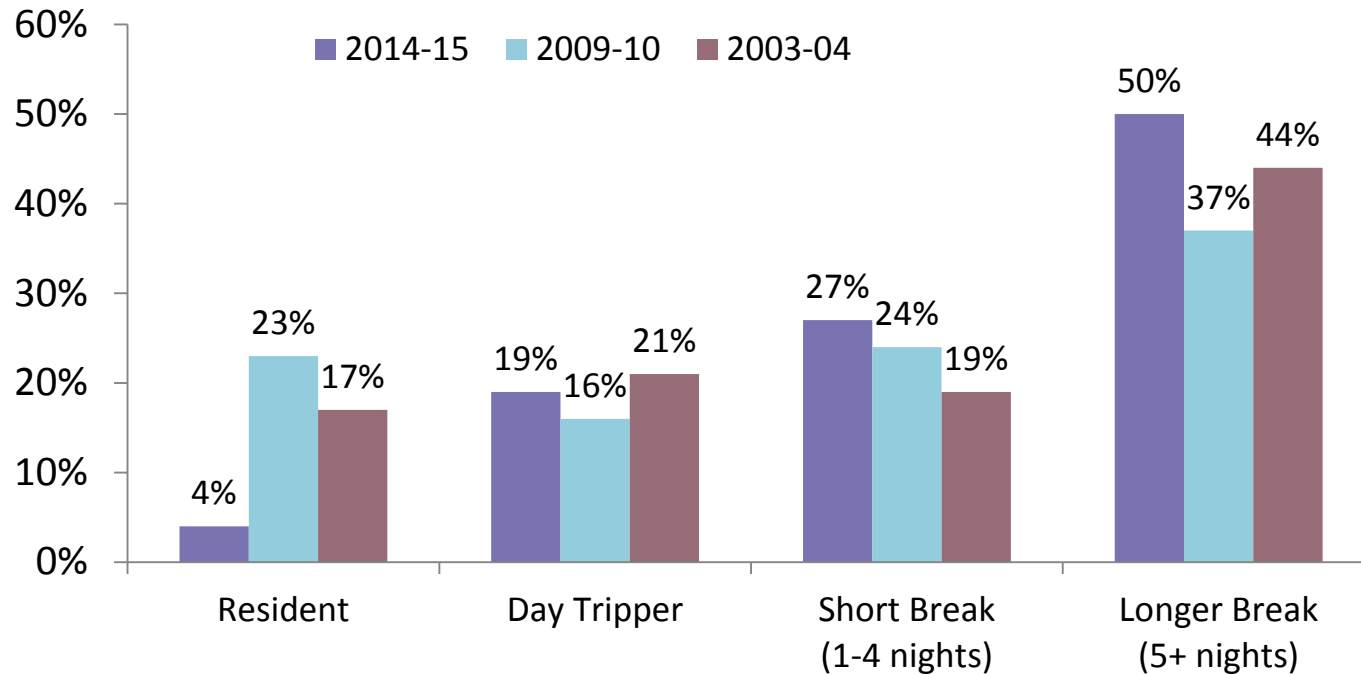
Visitors to Angus were most likely to be on a day trip (74%), while those in Aviemore were more likely than others to be on a short break (40%). Moray saw the highest proportion of visitors on a longer trip (73%).

Type of visitor – by season



Day trips and short breaks are more common in Winter, whilst Spring, Summer and Autumn have higher proportions of longer breaks.

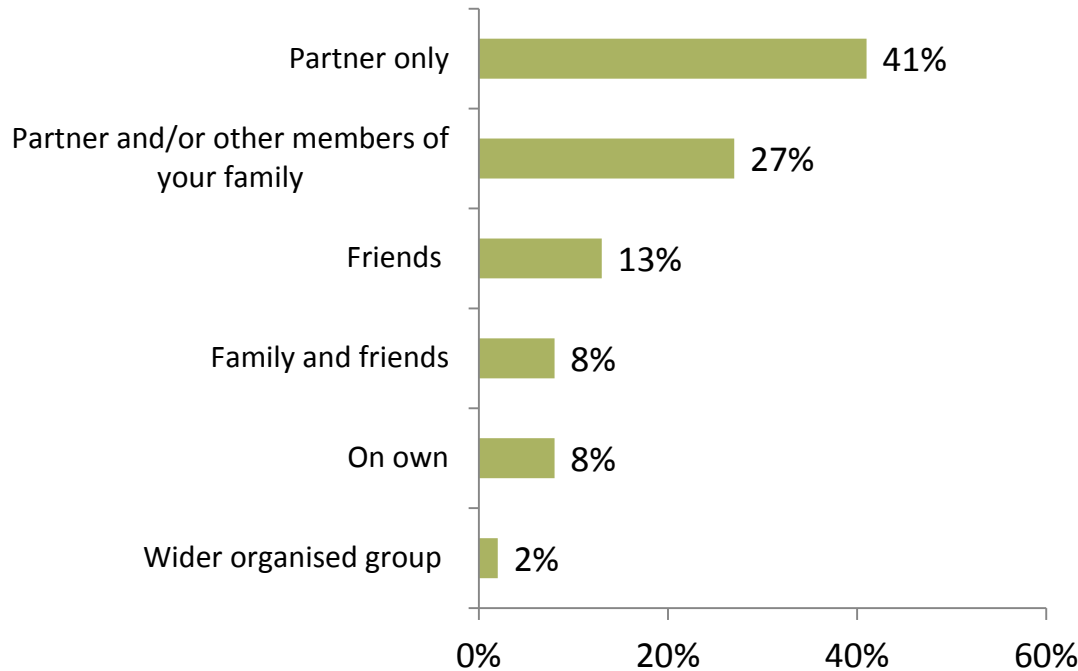
Type of visitor – by year



The profile is quite different in the current survey compared to the 2009-10 survey, due to the much lower proportion of residents included in the sample.

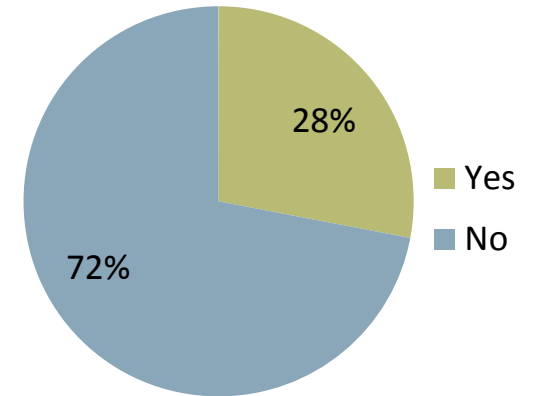
Who respondents visited with

What people are in your party on this trip?



The Cairngorms National Park is primarily a destination for couples and families rather than friends. Over one quarter of the sample reported having children in their group.

Children in party

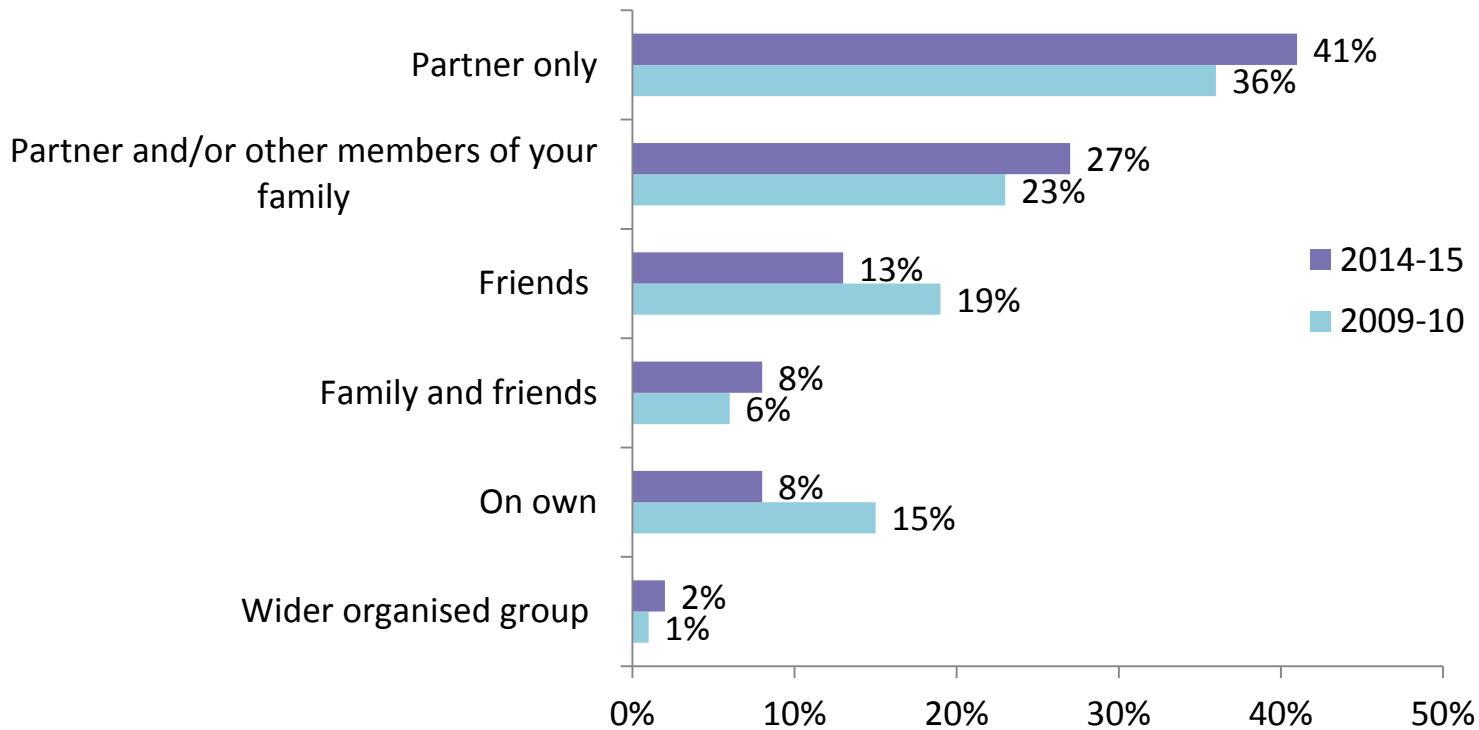


Similar proportions reported having children in the group in Spring (28%), Summer (29%) and Winter (31%). Fewer visitors had children with them in Autumn (21%).

Visitors to Strathspey were most likely to be visiting with children (47%), whereas visitors to Angus were most likely to be visiting without children (92%).

Who respondents visited with – by year

What people are in your party on this trip?



Party composition was broadly similar across survey years, although more visitors were with their partners and/or family in 2014-15 and fewer were with friends or on their own.

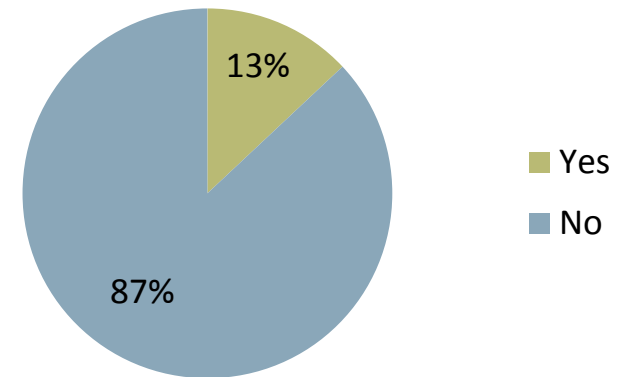
Who respondents visited with

Number in party	%
One	9%
Two	52%
Three	11%
Four	15%
Five +	14%

Number in party	Avg
Average number of adults	2.6
Average number of children*	2.1
Average group size	3.2

* Average number of children among parties that include at least one under 18 year old

Do you have a dog/dogs with you on this trip in the Cairngorms area?



The National Park would also appear to be welcoming to dogs: more than one tenth had a dog with them.

Group size confirms the prevalence of couples and family groups – very few travel in larger groups, such as tour parties or with friends.

A high proportion of singletons visited Angus (19%) and Atholl (17%), whereas larger groups of 5+ people tended to visit Aviemore (22%) and Strathspey (21%).

Derived from Q27- Including yourself, how many people in your party are in the following age groups?

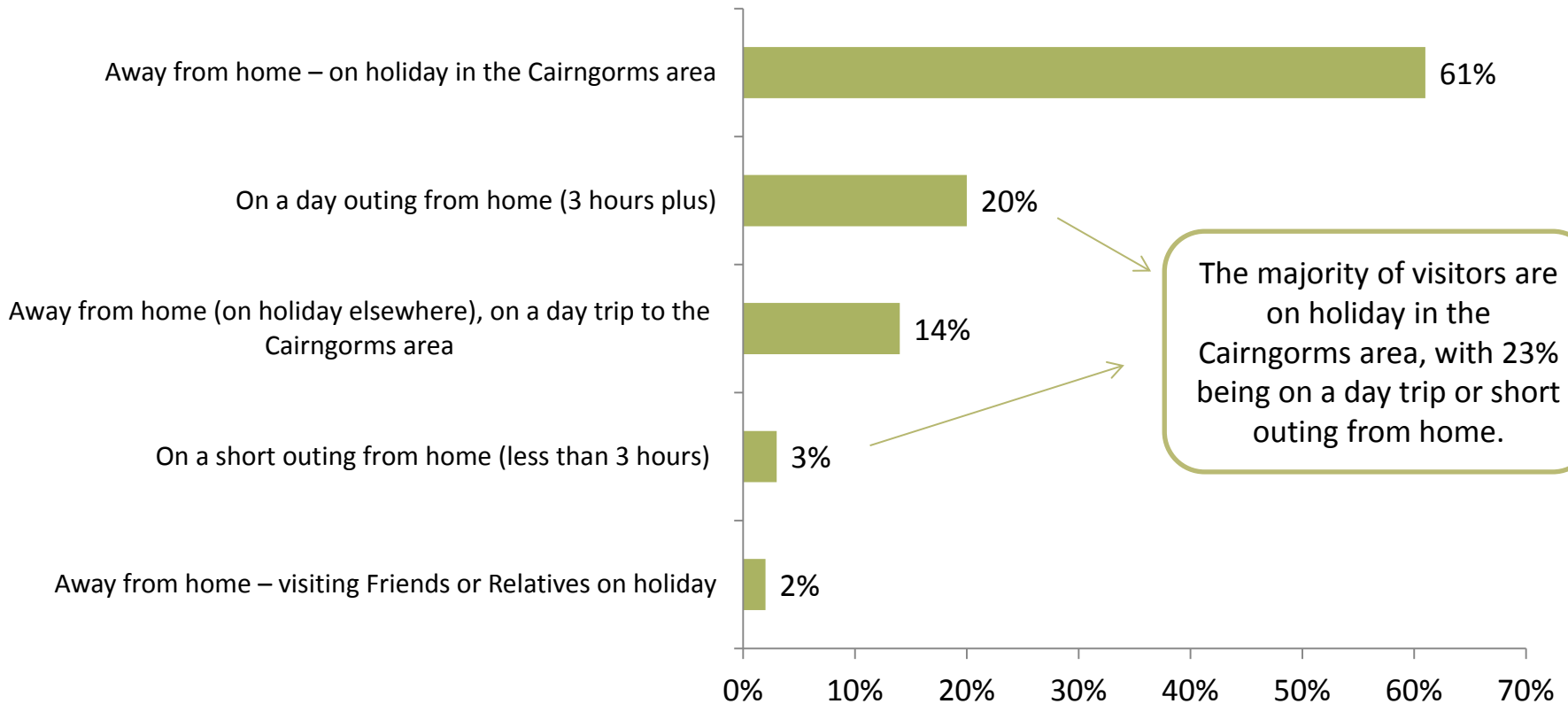
Q28 - Do you have a dog/dogs with you on this trip in the Cairngorms area?

Summary: visitor profile

- The vast majority of respondents (96%) were visitors; only 4% were residents of the area. Half of the respondents (50%) were on a longer break away from home (5+ nights), with 27% on a shorter break, 19% on a day trip from home and 4% being residents.
- The visitor profile is skewed to higher socio-economic groups, but with a spread of age and gender. The demographic profile was similar in 2014-15 compared to 2009-10 in relation to age and gender. However, the resident / visitor profile was different – 23% were residents in the 2009-10 survey, compared to 4% in 2014-15.
- Visitors were most likely to come from Scotland (54%), with the remainder fairly evenly split between the rest of the UK (26%) and overseas (21%). Compared to Scottish visitor statistics, the Cairngorms attracts a higher proportion of visitors from Scotland and a lower proportion from the rest of the UK.
- Most were repeat visitors to the area, with 34% being first time visitors (within the last five years). There is clearly a loyal group of visitors who come to the area regularly: almost a fifth have been more than 20 times in the last five years.
- Respondents were most likely to be visiting with their partner only (41%) or with partner and/or other members of their family (27%). This pattern was similar to the 2009-10 survey, although more visitors were with their partners and/or family in 2014-15 and fewer were with friends or on their own.

Visit characteristics

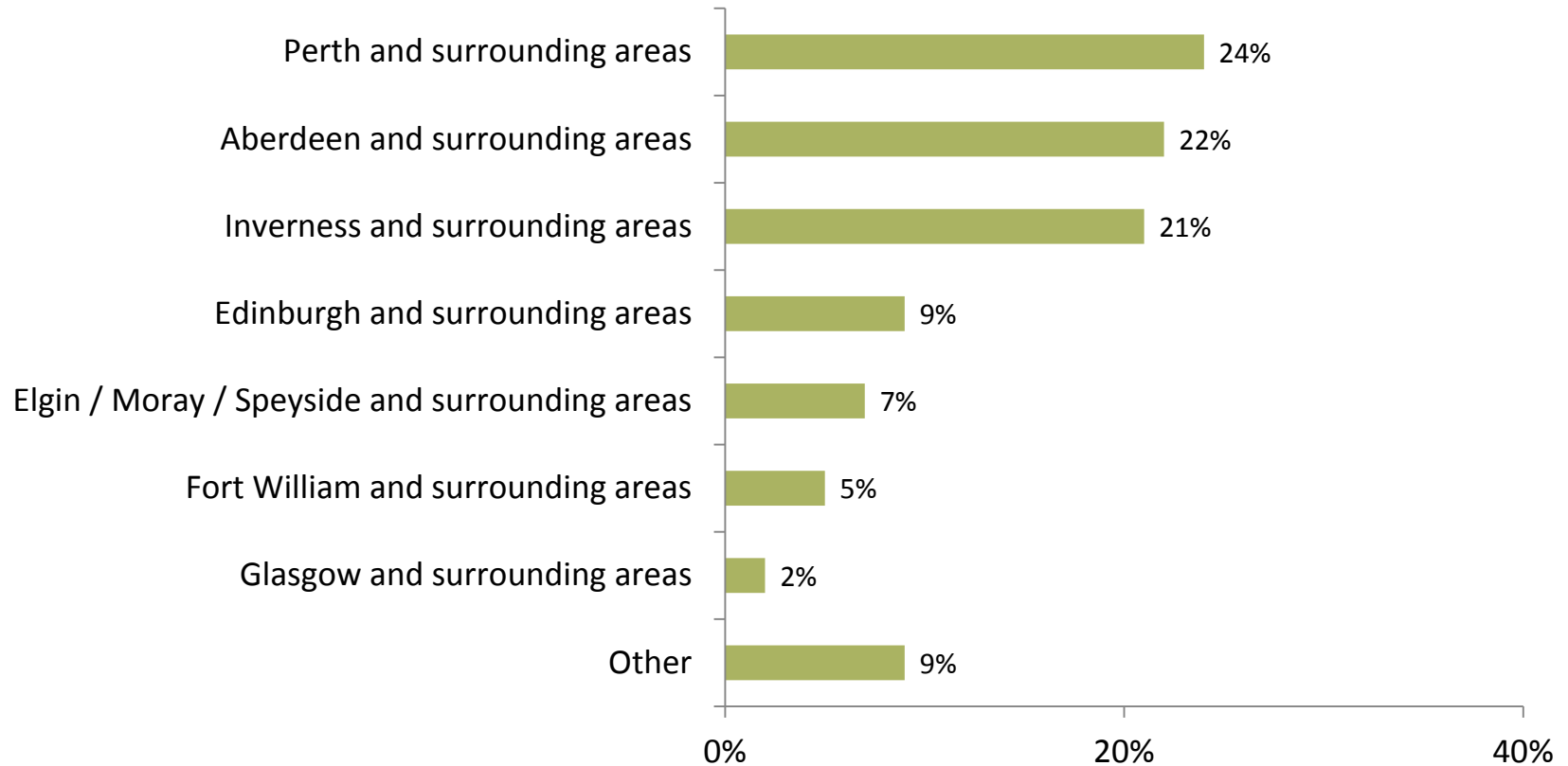
Type of visit



Visitors to Aviemore (79%) and Glenmore (76%) were most likely to be on holiday in the Cairngorms area. Visitors to Angus were most likely to be on a day outing from home (71%).

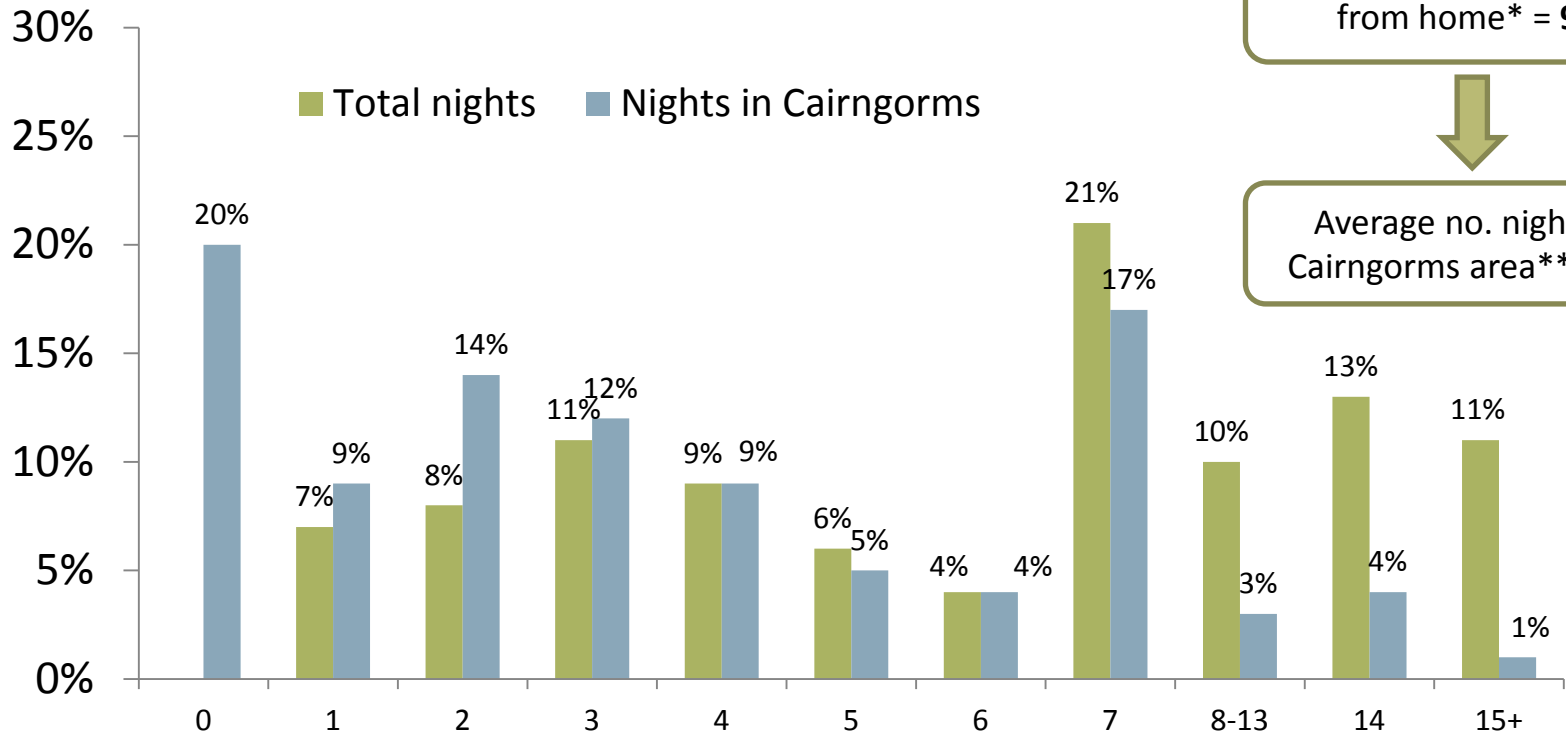
The type of trip was very consistent between the current and previous surveys, although the question was asked slightly differently this year.

Where visitors on holiday on a day trip to the Cairngorms had travelled from



Those respondents who were away on holiday but had taken a day trip to the area tended to come from within a 2 hour drive time of the Cairngorms.

Number of nights away from home/in Cairngorms



Average no. nights away from home* = **9.3**



Average no. nights in Cairngorms area** = **4.2**

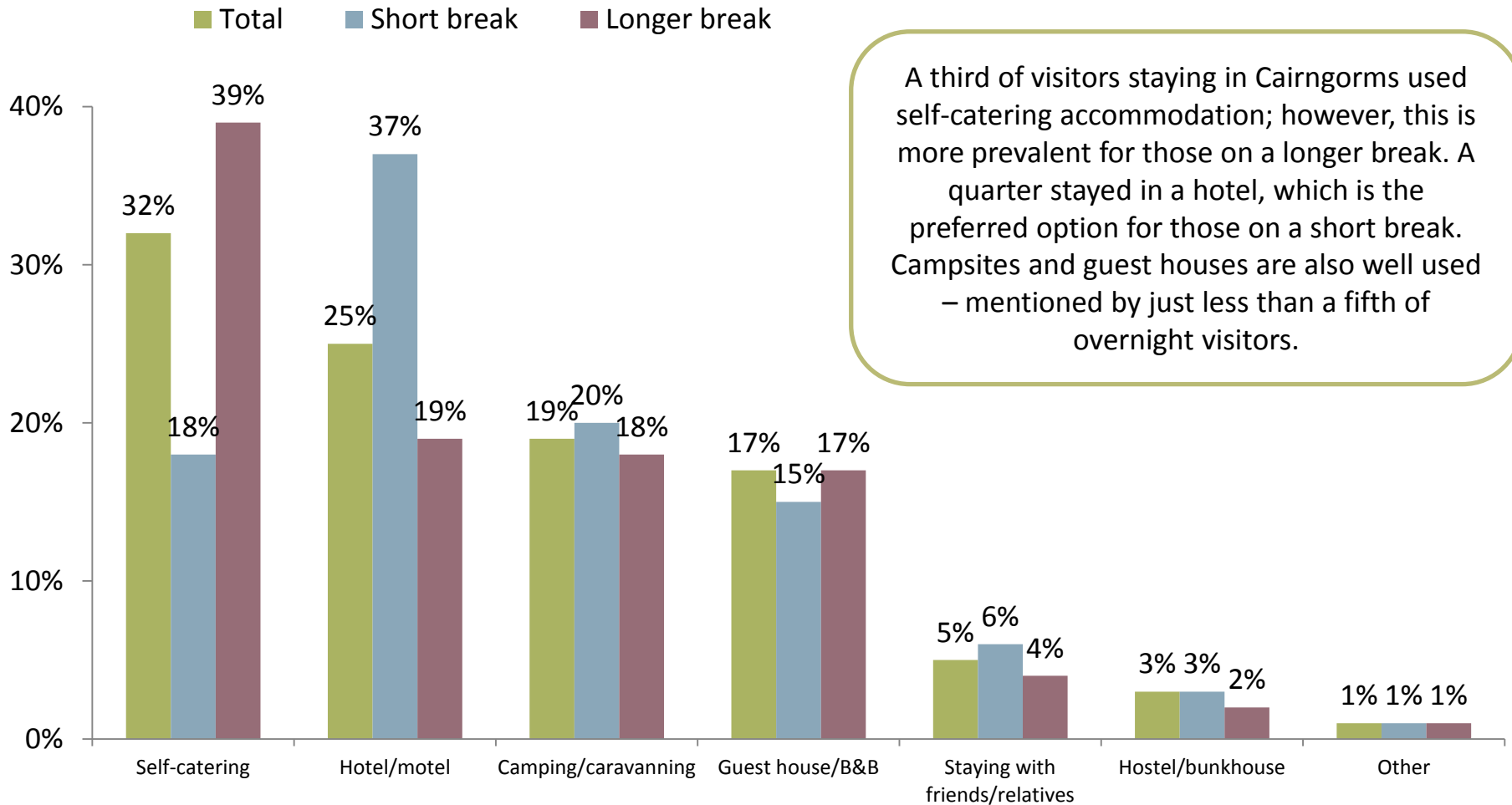
Four fifths of people staying away from home were staying at least some time within the Park.

Visitors tended to be staying slightly longer in 2014-15 than they had been in 2009-10; an average of 9.3 nights away from home compared to 7.4 in the previous survey.

* Base (All visitors away from home): 1963

** Base (All visitors staying at least one night in the Cairngorms): 1580

Type of accommodation

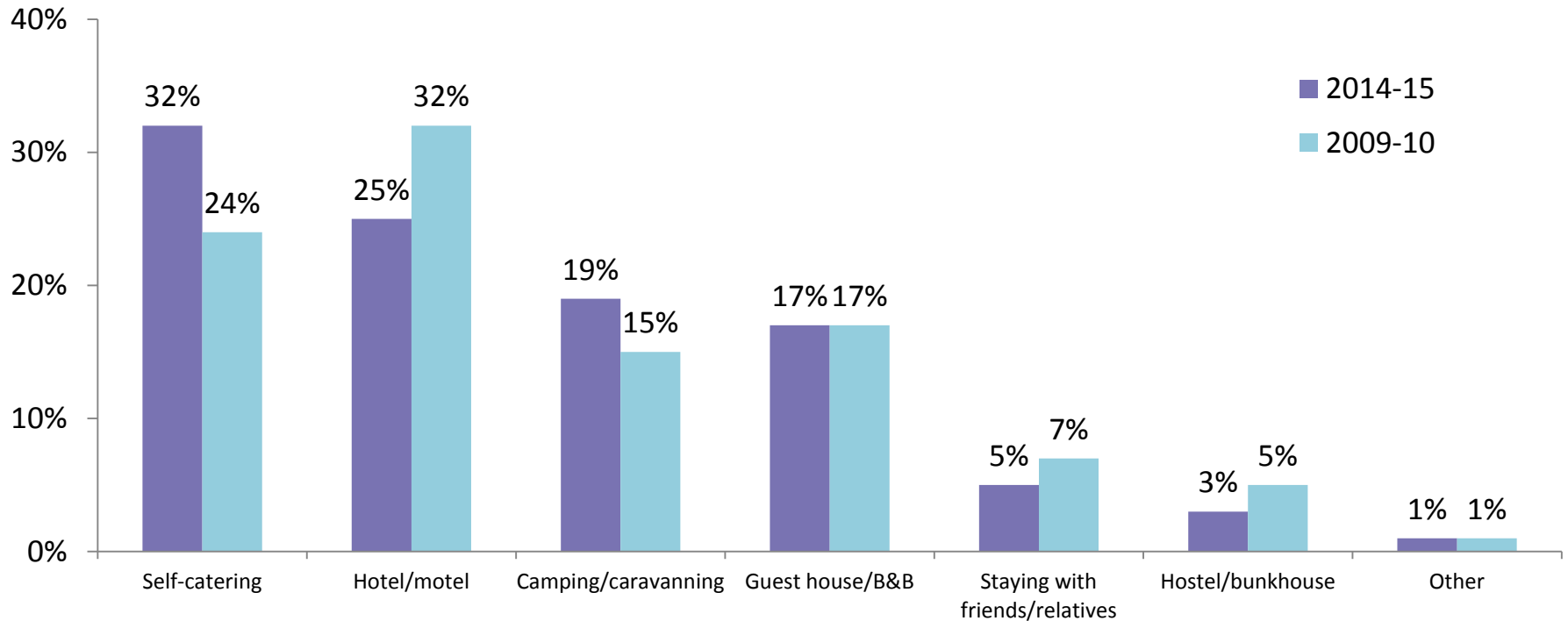


A third of visitors staying in Cairngorms used self-catering accommodation; however, this is more prevalent for those on a longer break. A quarter stayed in a hotel, which is the preferred option for those on a short break. Campsites and guest houses are also well used – mentioned by just less than a fifth of overnight visitors.

Type of accommodation

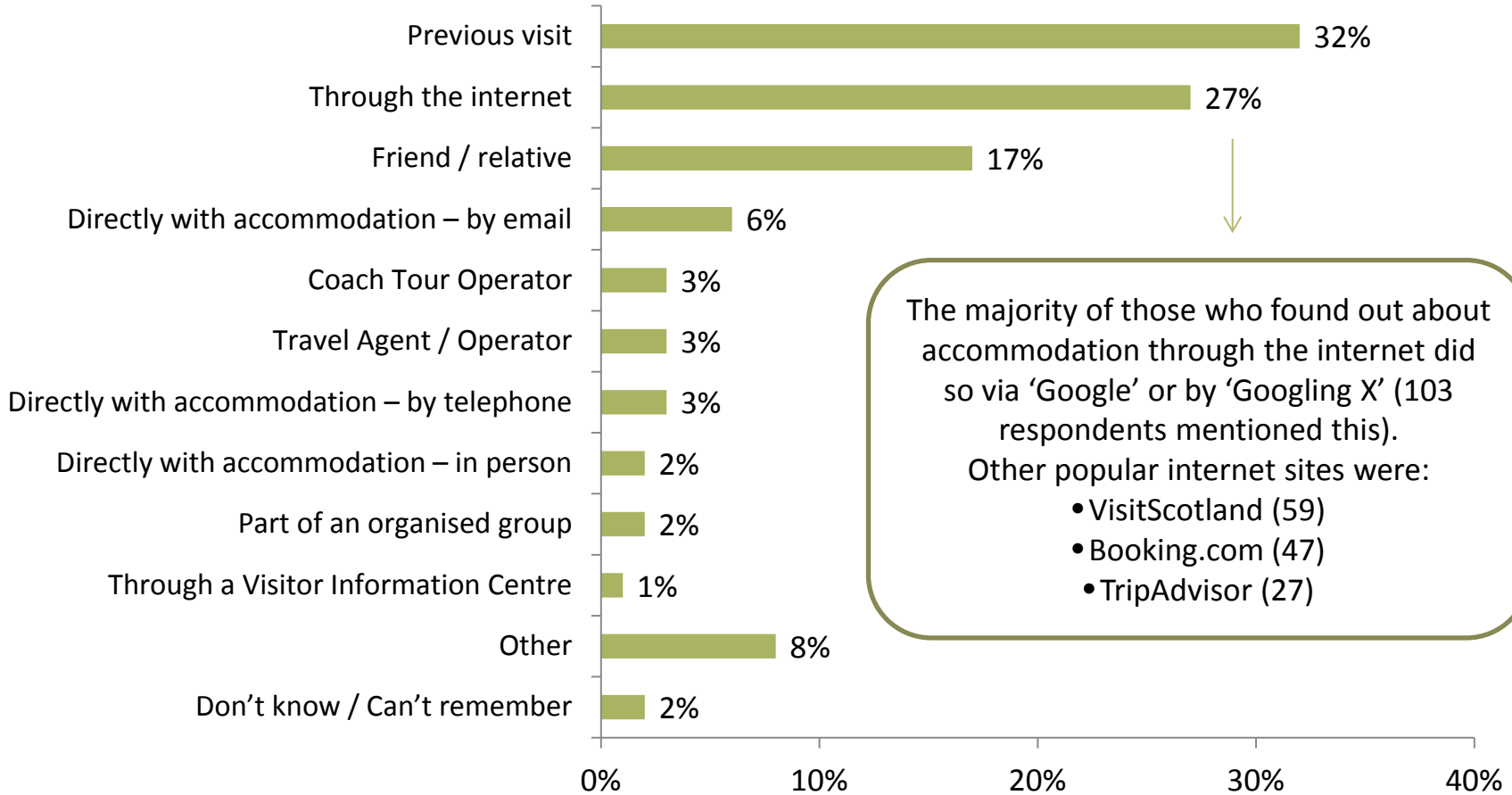
- Sub-group differences included:
 - Those most likely to stay in a **hotel/motel**: visitors to Moray (37%), those on a short break (37%), first time visitors (33%), overseas visitors (32%), those without children (29%), C2DEs (30%) and older respondents (34% of 65+).
 - Those most likely to be **camping**: those visiting Atholl (47%), repeat visitors (22%) and Scottish visitors (23%).
 - Those most likely to be **self-catering**: those visiting Glenmore (42%), longer break (39%), repeat visitors (36%), rest of UK, middle-aged visitors (36% of 35-44s, 37% of 45-54s).
- There were also some seasonal differences:
 - Winter visitors were more likely to stay in self-catering accommodation (42%) than those visiting in Summer (27%), Autumn (34%) or Spring (33%).
 - Autumn visitors were the most likely to stay in a hotel/motel (31%).

Type of accommodation – by year



Visitors in 2014-15 were more likely to be using self-catering accommodation or camping/caravanning, and less likely to be staying in a hotel/motel compared to the previous survey.

How visitors found out about accommodation



The majority of those who found out about accommodation through the internet did so via 'Google' or by 'Googling X' (103 respondents mentioned this).
 Other popular internet sites were:

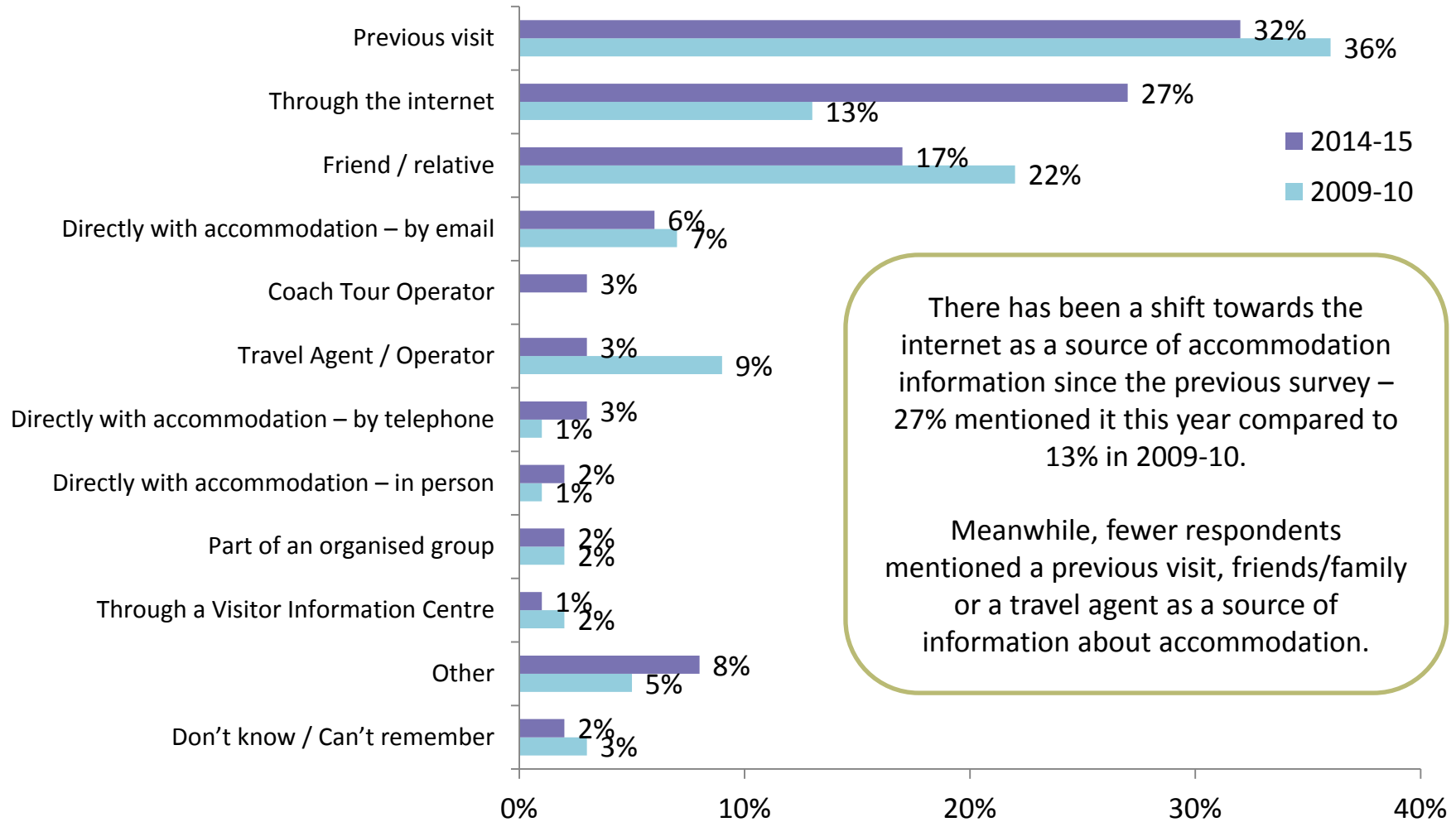
- VisitScotland (59)
- Booking.com (47)
- TripAdvisor (27)

Experience (both visitors' own and that of others) is vital → repeat visits and recommendations.
 The internet is also very important → accommodation must have a good online presence.

How visitors found out about accommodation

- Some sub-group differences emerged in relation to information sources about accommodation:
 - **Scottish** visitors were more likely than others to mention a previous visit (42%) or friends / relatives (19%).
 - **Overseas** visitors were more likely than others to mention a travel agent / operator (11%) or a coach tour operator (6%).
 - **First time visitors** were more likely than repeat visitors to have found out about accommodation via the internet (39%).
 - The **oldest age group** were least likely to mention the internet (16% of over 65s).
 - Visitors to **Moray** were more likely to mention a travel agent / operator (14%) or a coach tour operator (10%) than other areas – this is perhaps unsurprising given the high proportion of overseas visitors to Moray.

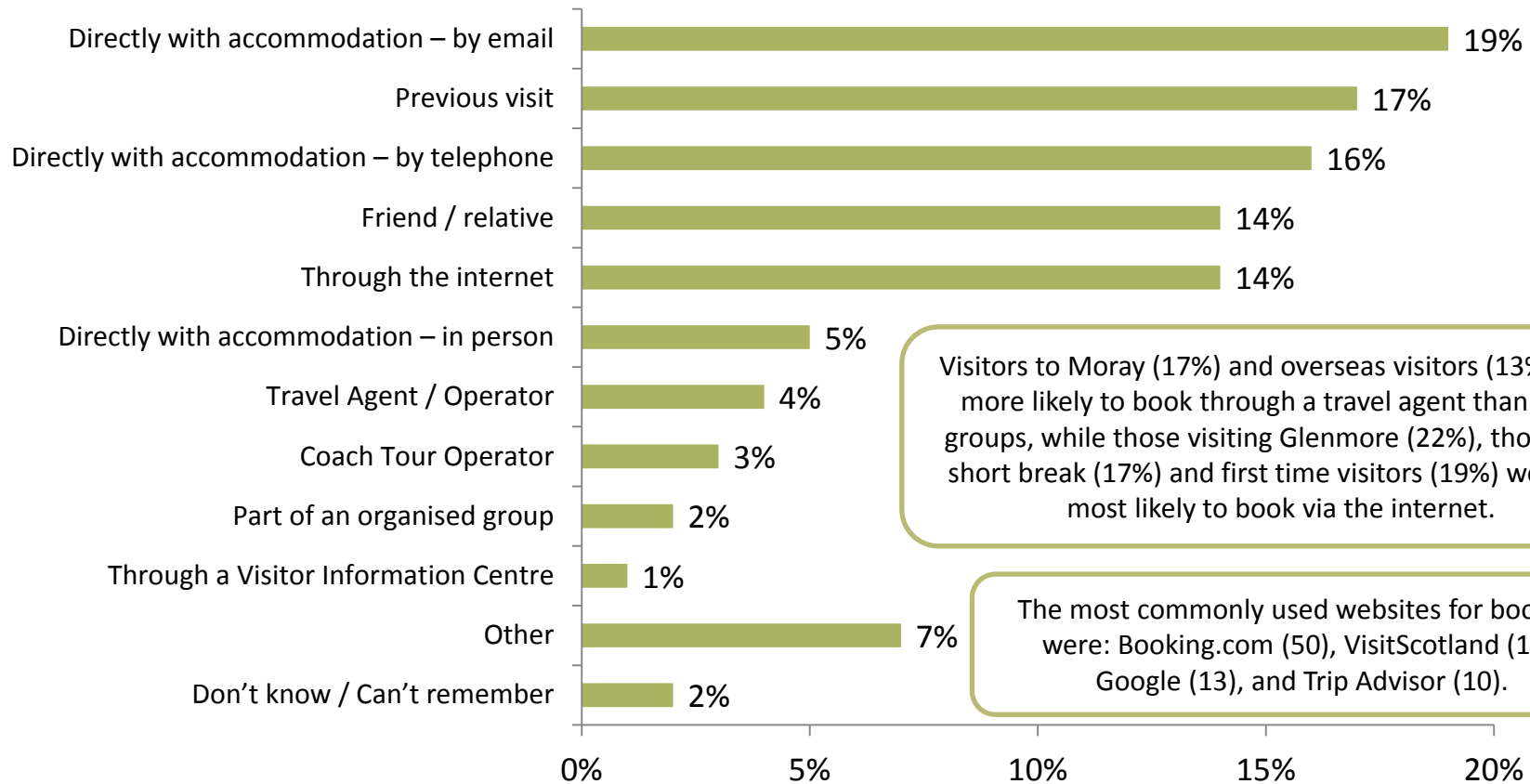
How visitors found out about accommodation – by year



There has been a shift towards the internet as a source of accommodation information since the previous survey – 27% mentioned it this year compared to 13% in 2009-10.

Meanwhile, fewer respondents mentioned a previous visit, friends/family or a travel agent as a source of information about accommodation.

Booking accommodation

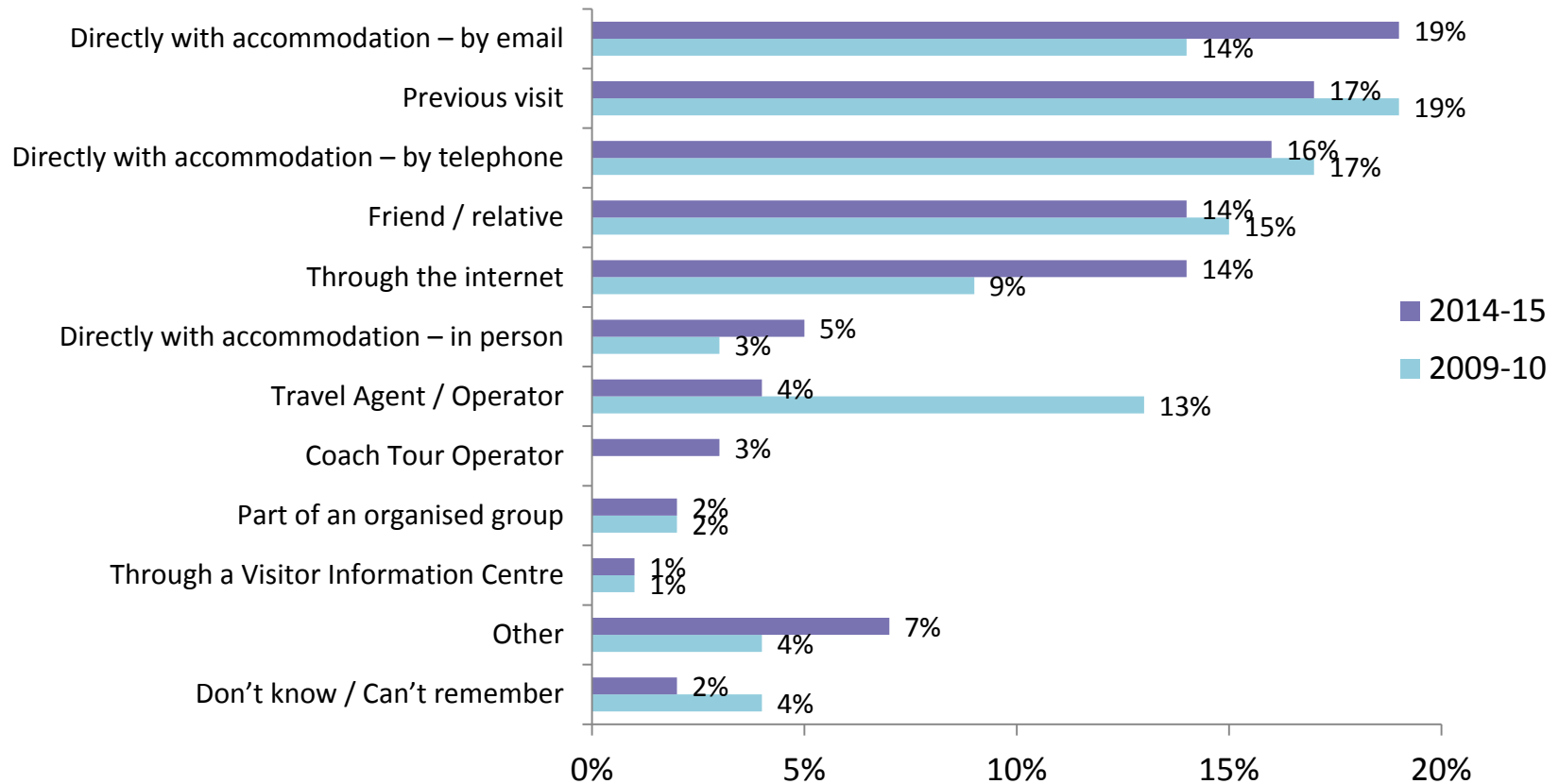


Visitors to Moray (17%) and overseas visitors (13%) were more likely to book through a travel agent than other groups, while those visiting Glenmore (22%), those on a short break (17%) and first time visitors (19%) were the most likely to book via the internet.

The most commonly used websites for booking were: Booking.com (50), VisitScotland (14), Google (13), and Trip Advisor (10).

A variety of booking methods were mentioned with none noticeably prevalent. Visitors are, however, most likely to book independently – booking directly by email, telephone, the internet or during a visit rather than through operators or agents.

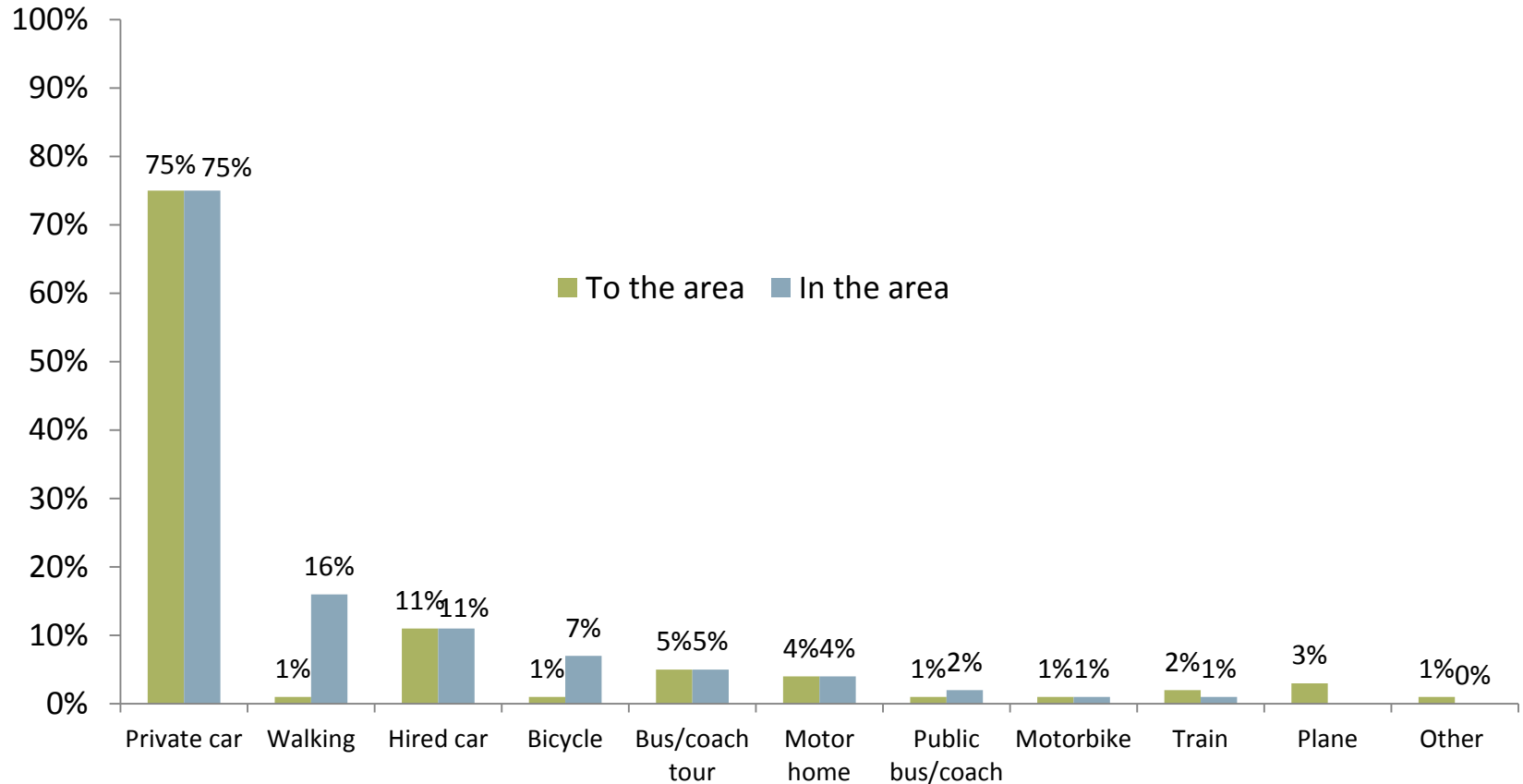
Booking accommodation – by year



Accommodation booking methods were broadly consistent with the previous survey, with the exception of bookings through the internet (an increase from 9% to 14%) and directly with the accommodation by email (14% to 19%). In addition, fewer had booked via a travel agent this year (4% compared to 13% in 2009-10).

Base (All who stayed overnight at least one night in the Cairngorms area): 2014-15 (1580), 2009-10 (1617)

Method of transport

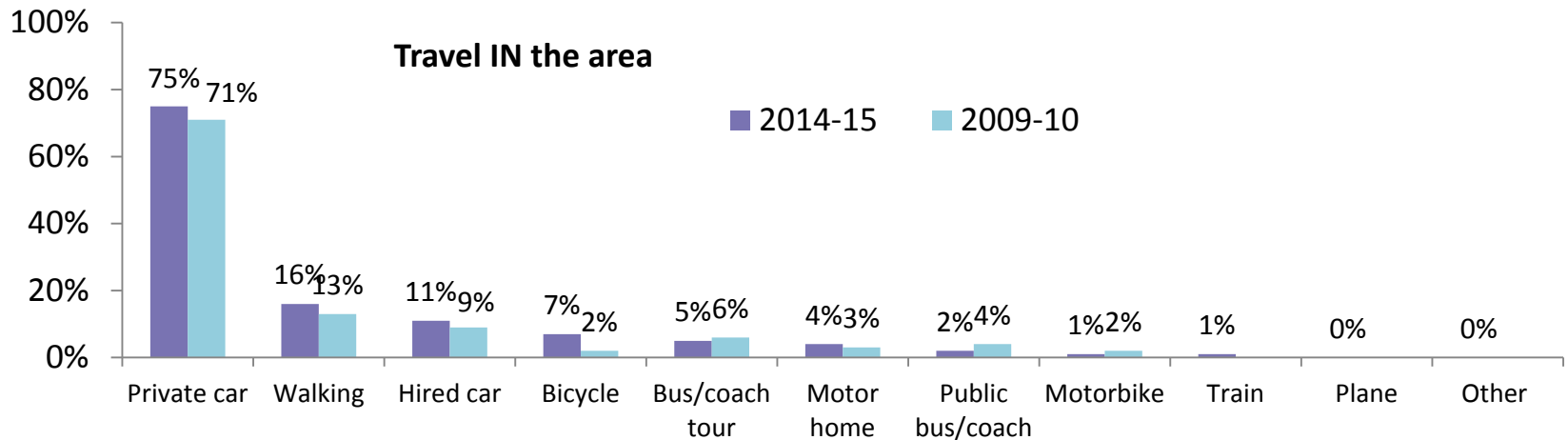
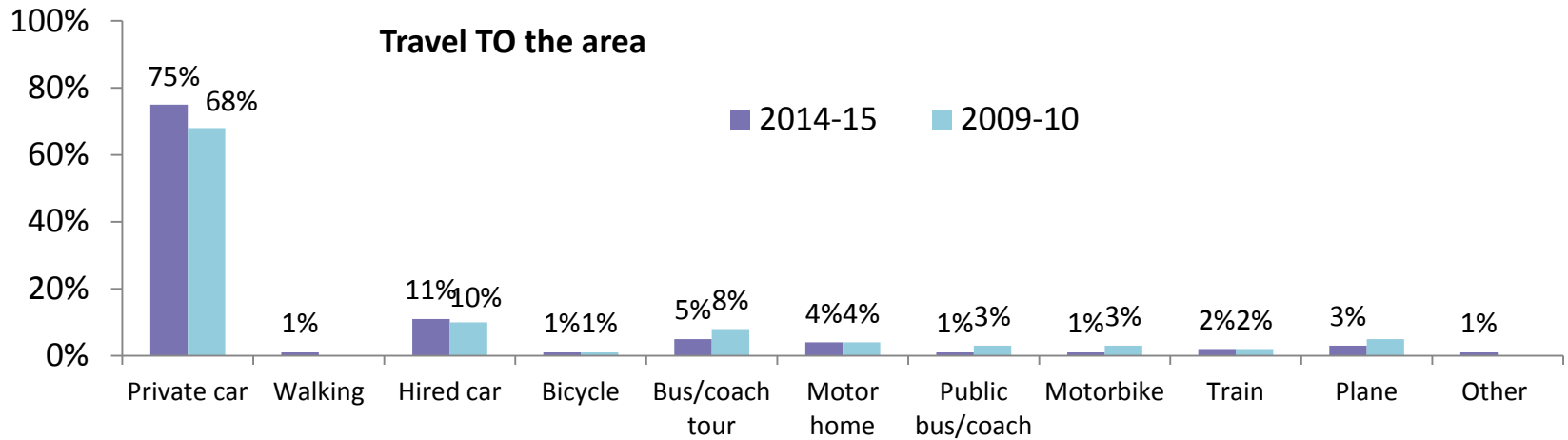


Public transport use was very low → could be due to lack of interest or lack of provision.
 Car is by far the main mode → implications for parking and road infrastructure.

Method of transport

- Given the high proportion of overseas visitors to **Moray**, it is perhaps not surprising that those in this area were least likely to make use of a private car – just under half did so both getting to (47%) and within the area (49%). These visitors were far more likely to make use of a hired car – just over a quarter did so during their visit (28%).
- 86% of visitors to **Angus** stated that walking was their main method of transport within the Cairngorms – most likely due to Glen Doll and Glenclova being popular destinations for hillwalkers.

Method of transport – by year



Transport methods are broadly similar over time, although there has been an increase in the proportion of respondents travelling to and within the area by private car since 2009-10.

Q9 - Transport to get to the Cairngorms area?
 Q9a - Transport within the Cairngorms area?

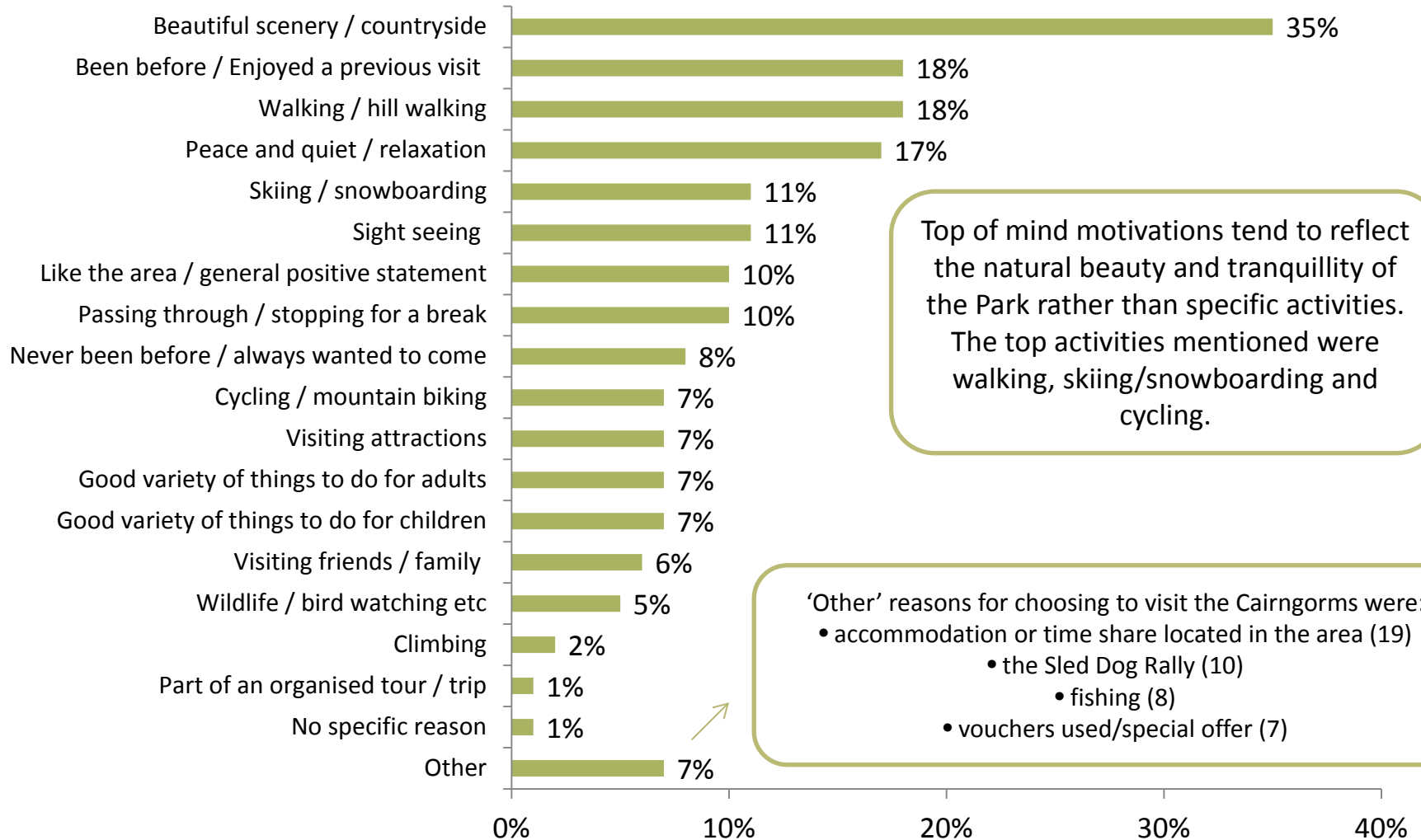
Base Q9: (All visitors): 2014-15 (2458), 2009-10 (1937)
 Base Q9a (All): 2014-15 (2553), 2009-10 (2500)

Summary: visit characteristics

- The majority of visitors were away from home on holiday in the Cairngorms area, with 23% being on a day trip or short outing from home.
- Those who were on holiday elsewhere but taking a day trip to the area tended to come from within a 2 hour drive time of the Cairngorms.
- Four fifths of people staying away from home were staying at least some time within the Park: those on holiday were spending an average of 9.3 nights away from home, with an average of 4.2 of these spent in the Cairngorms area.
- Self-catering accommodation was the most popular option, followed by hotels and then camping – although most accommodation types were mentioned by significant proportions of respondents. Visitors in 2014-15 were more likely to be using self-catering accommodation or camping/caravanning, and less likely to be staying in a hotel/motel compared to the previous survey.
- Most visitors found out about their accommodation through a previous visit, from the internet (most often from Google, VisitScotland or Booking.com), or from friends/relatives.
- There has also been a shift towards the internet as a source of accommodation information since the previous survey (27% mentioned it this year compared to 13% in 2009-10). This highlights the increasing importance of accommodation having a good online presence.
- Visitors were most likely to book their accommodation directly with the accommodation provider, by email, or by phone. Again there has been an increase in the proportion booking online compared to the previous survey.
- The majority of visitors (75%) arrived by private car and use of public transport was very low.

Reasons for visiting and expectations

Main reasons for choosing to visit Cairngorms area



Q5 - What were your main reasons for choosing to visit the Cairngorms area on this trip?
(Spontaneous)

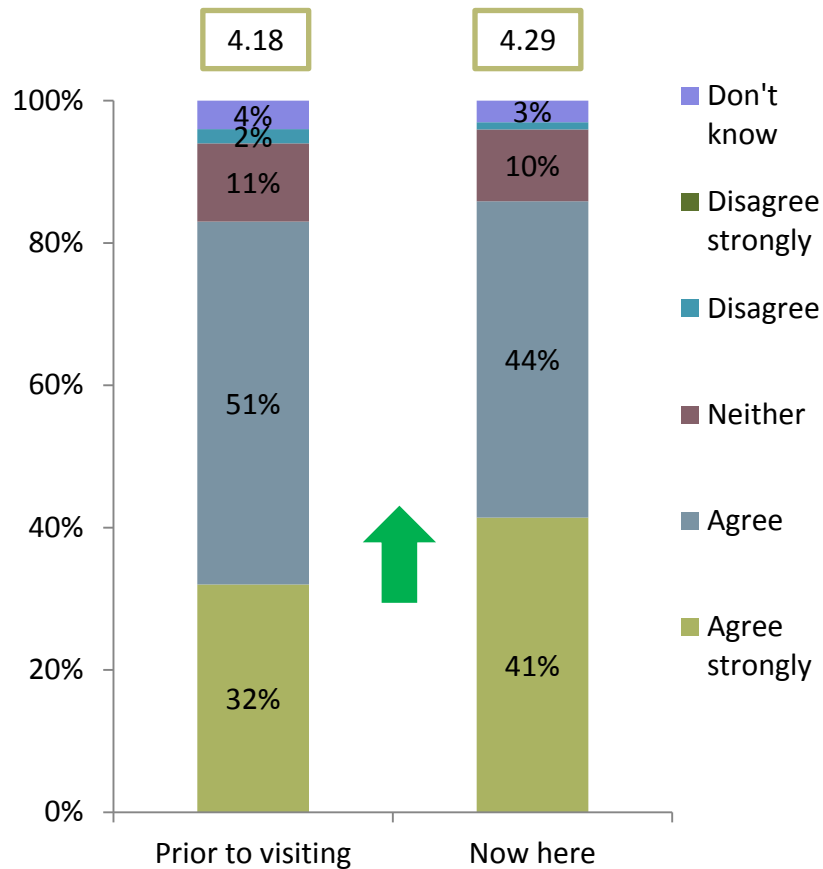
Base (All visitors): 2458

Main reasons for choosing to visit Cairngorms area

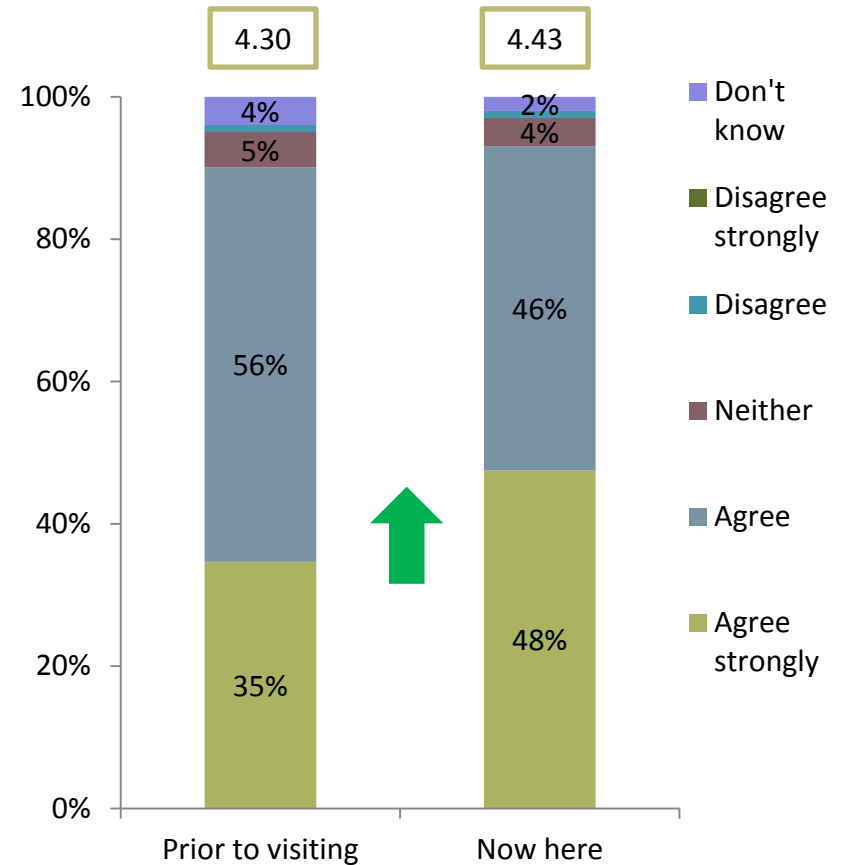
- The following sub-group differences were evident in stated reasons for choosing to visit the area:
 - Men were more likely to mention active pursuits as a reason for visiting, while women were more likely to mention the scenery and peace and quiet, and the variety of things to do for adults and children.
 - ABC1 visitors were more likely than C2DEs to mention the beautiful scenery (35%).
 - There was an age split in terms of reasons for visiting, with the older age groups more likely to mention beautiful scenery and younger age groups more likely to mention active pursuits.
- As would be expected, some seasonal differences existed:
 - In Winter (59%) skiing/snowboarding is the top reason for visiting .
 - In Summer (39%), Autumn (29%) and Spring (44%) the beautiful scenery/countryside is the key reason.
- Area differences included:
 - Visitors to Moray were the most likely to visit for the beautiful scenery, peace and quiet and sightseeing. Visitors to Badenoch were the least likely to visit for these reasons, but instead were drawn by the cycling/biking – mentioned by 22%. Other activities that drew visitors were winter sports at Aviemore (32%), and wildlife / bird watching at Strathspey (13%).
 - Visitors to Strathspey were also more likely than visitors to other areas to visit because of the variety of things to do for children, reflecting the high proportion visiting this area with children.

Perceptions of Cairngorms 'prior to visiting' vs. 'now here'

An area where it is possible to experience history and culture



An area where visitors are well catered for



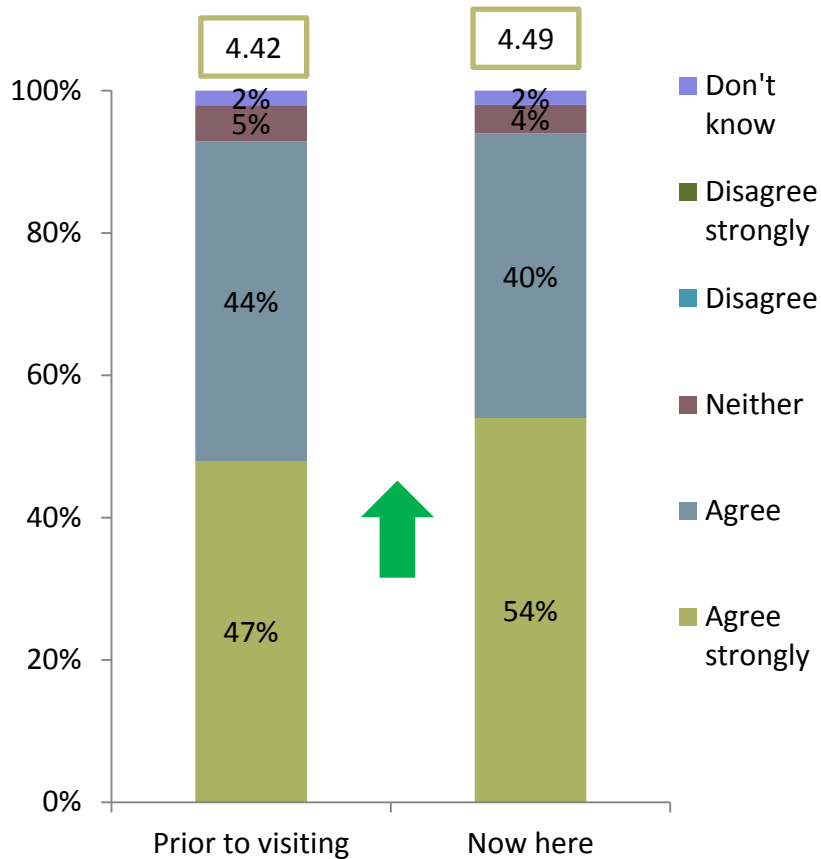
Q6a How much do you agree/disagree that the statement describes what you thought the Cairngorms area would be like, *prior to visiting*?

Q6b How much you agree/disagree that the statement describes the Cairngorms area *now that you are here*?

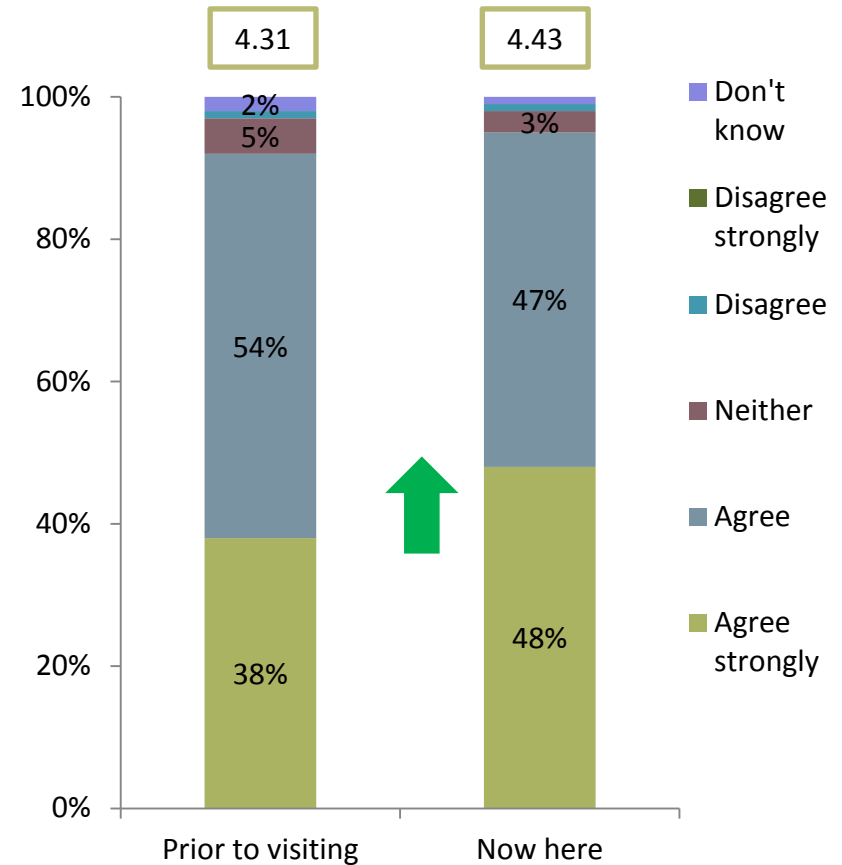
Base (All visitors): 2458

Perceptions of Cairngorms 'prior to visiting' vs. 'now here'

An area with great opportunities to see wildlife



A tranquil unspoilt wilderness where conservation is the key aim



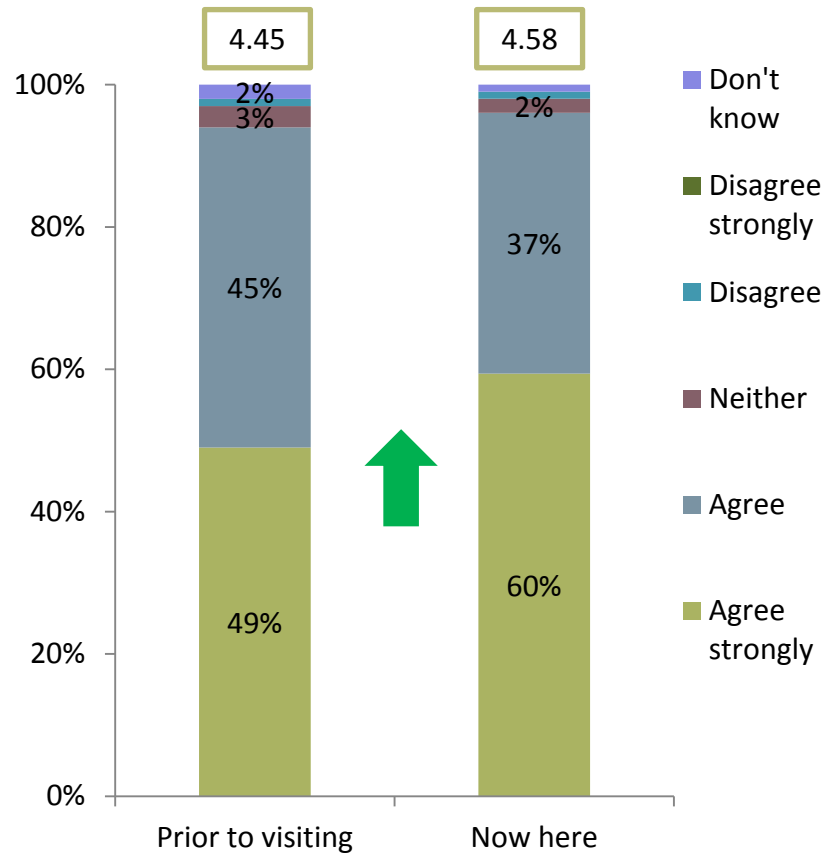
Q6a How much do you agree/disagree that the statement describes what you thought the Cairngorms area would be like, *prior to visiting*?

Q6b How much you agree/disagree that the statement describes the Cairngorms area *now that you are here*?

Base (All visitors): 2458

Perceptions of Cairngorms 'prior to visiting' vs. 'now here'

An area with plenty of attractions and outdoor activities



Across all statements, almost all respondents agreed they were aware of the positive attributes of the Cairngorms area before visiting. The key difference for them on visiting, is that they become more likely to agree strongly with the statements.

↓

Their visit confirms and exceeds their expectations.

Q6a How much do you agree/disagree that the statement describes what you thought the Cairngorms area would be like, *prior to visiting*?

Q6b How much you agree/disagree that the statement describes the Cairngorms area *now that you are here*?

Perceptions of Cairngorms ‘prior to visiting’ vs. ‘now here’

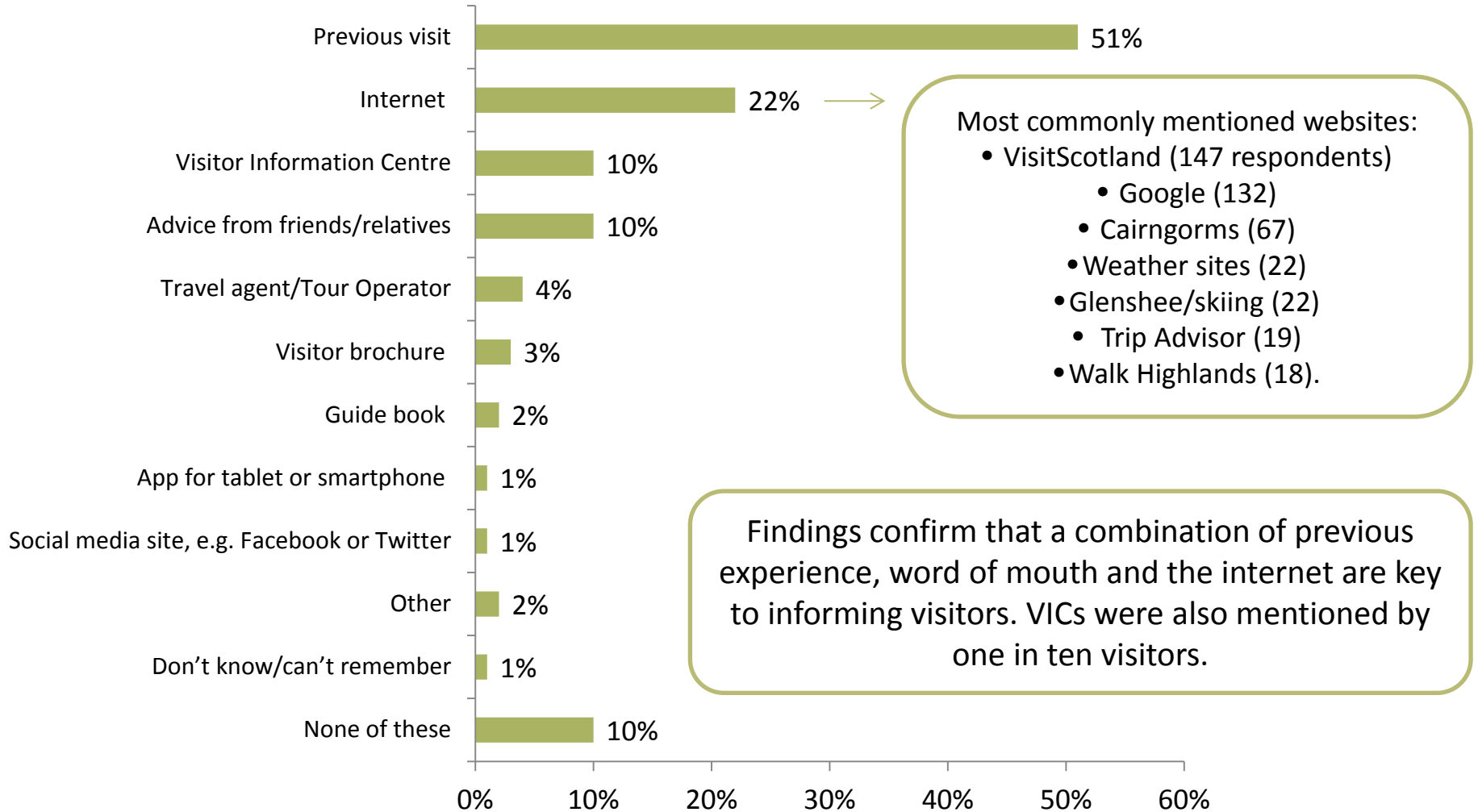
- Although the pattern was not consistent across all of the statements, there was a general trend for **overseas visitors** and those on a **longer break** to have slightly lower expectations than other visitors, but to give higher ratings than others after getting to the Cairngorms.
- Generally, visitors to **Strathspey** expressed lower expectations than those visiting other areas. Nevertheless, once in the Cairngorms their ratings increased.
- **Winter visitors** tended to give lower agreement ratings for these aspects than others before visiting, although again their ratings increased upon visiting.

Summary: reasons for visiting and expectations

- The most commonly mentioned reasons for visiting the Cairngorms were:
 - Beautiful scenery/countryside (mentioned by 35%)
 - Enjoyed a previous visit (18%)
 - Walking/hill walking (18%)
 - Peace and quiet/relaxation (17%).
- Many visitors are also attracted by more active pursuits, such as biking, skiing and winter sports, attractions and activities for children.
- Visitors tended to have high expectations of the area before they visited, and these expectations were met and exceeded on every measure: the mean scores were significantly higher for all statements when visitors compared their perceptions now to their perceptions before visiting.

Information sources

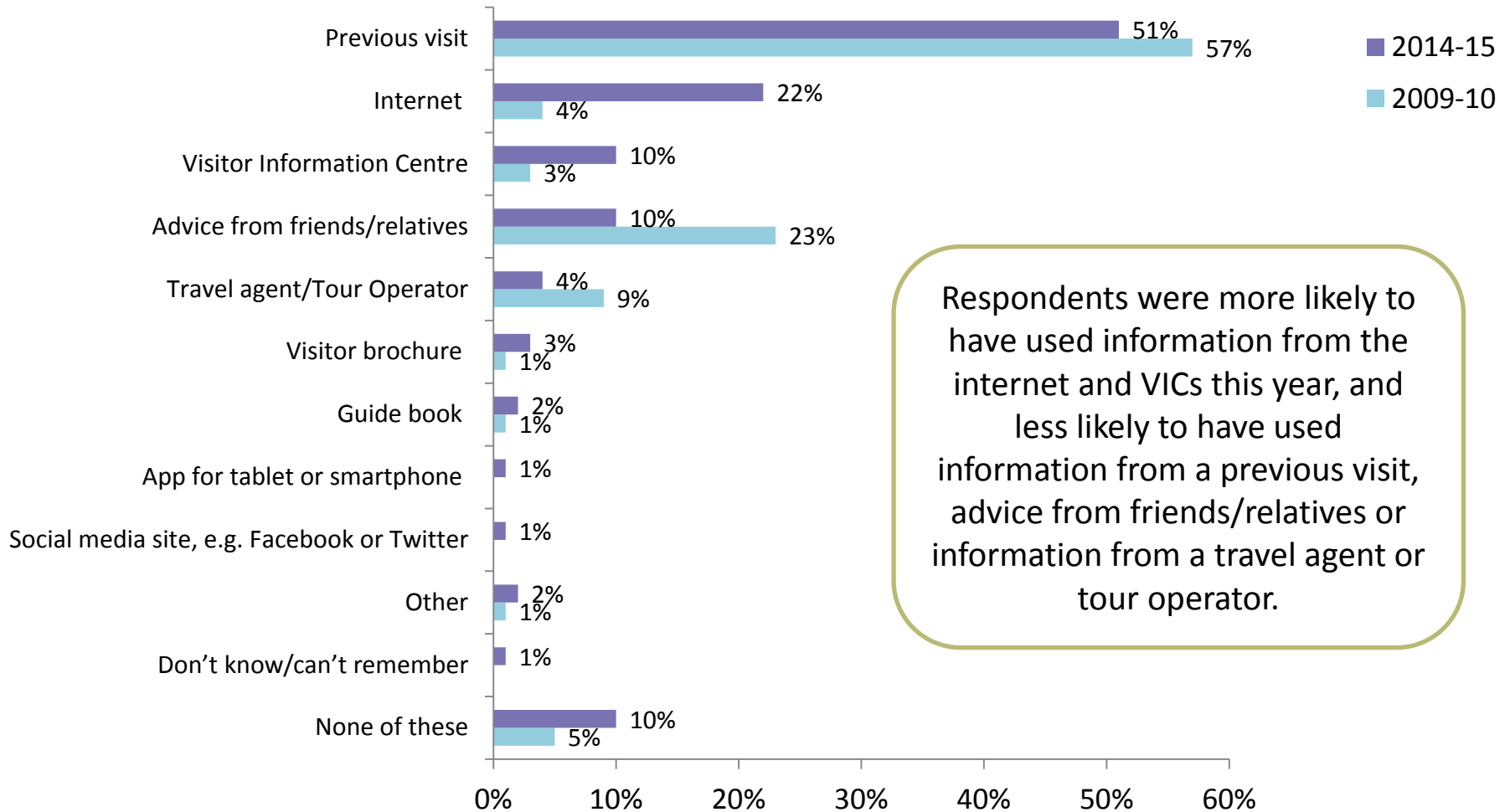
Sources of information



Sources of information

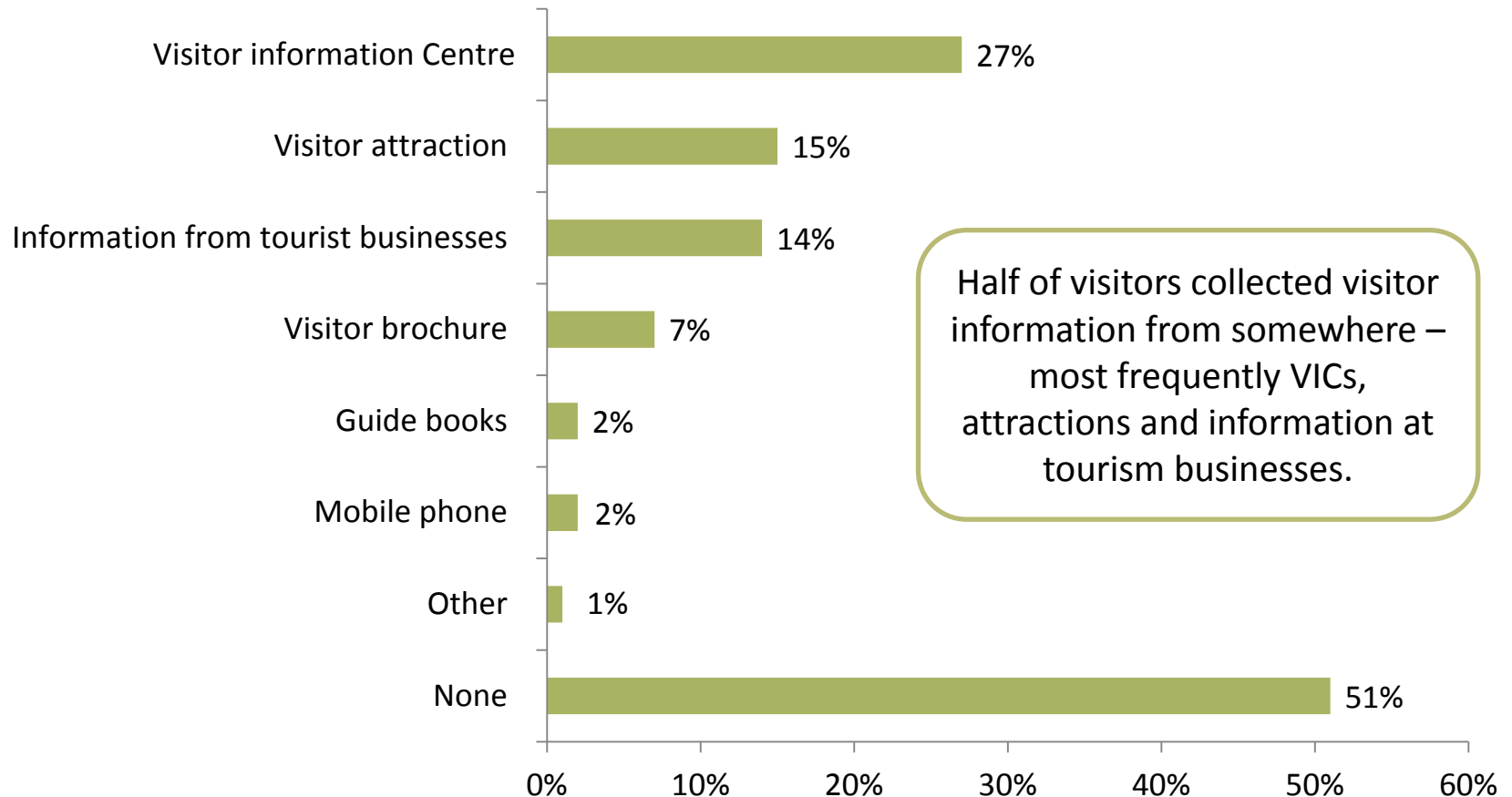
- There were some sub-group differences in relation to use of information sources, including:
 - Those most likely to use the **internet** were overseas visitors (29%) and those from the rest of the UK (29%), those visiting Moray (28%) and Deeside (26%), first time visitors (34%), those on a longer break (27%), ABC1s (25%) and younger visitors (29% of 16-34s and 26% of 35-44s, compared to 12% of over 65s).
 - Visitors most likely to use **VICs** were: longer break visitors (14%), first time visitors (18%), overseas visitors (20%), and those visiting Glenmore (25%).

Sources of information – by year



Respondents were more likely to have used information from the internet and VICs this year, and less likely to have used information from a previous visit, advice from friends/relatives or information from a travel agent or tour operator.

Visitor information picked up



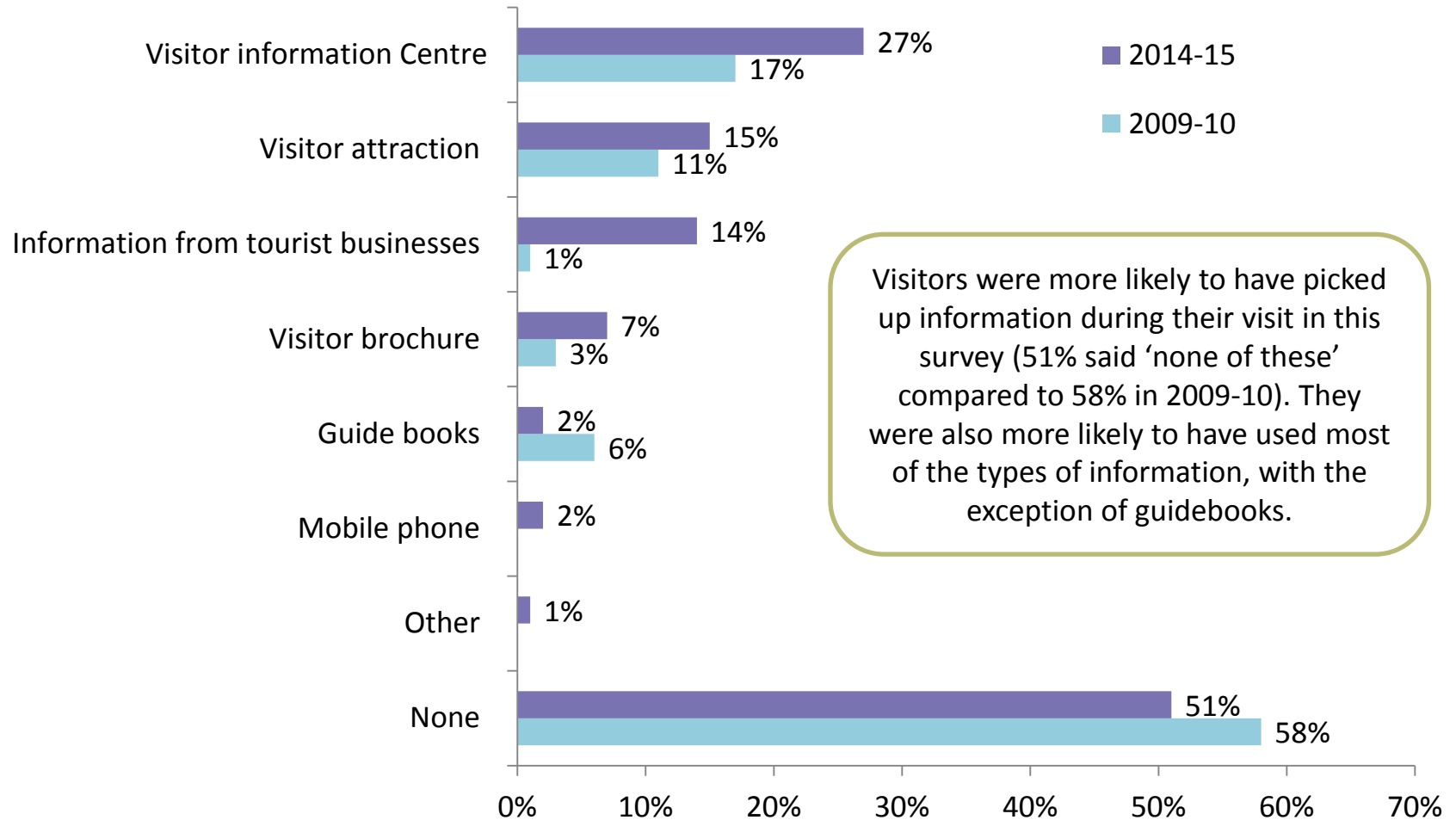
Q8 - Have you picked up visitor information from any of the following sources during your visit to the Cairngorms?

Base (All): 2553

Visitor information picked up

- There were some patterns terms of which groups were most likely to access information during their visit:
 - Overseas visitors were most likely to pick up information during the visit from VICs (50%), visitor attractions (31%) and visitor brochures (16%).
 - Those visiting Angus (82%), Scottish visitors (64%) and repeat visitors (59%) were more likely than others to say they had not picked up any information during their visit.
 - Women were more likely than men to have picked up information from VICs (33%), attractions (17%) and brochures (9%), while men were more likely not to have picked up any information at all (56% said 'none').
 - C2DEs were also more likely to say 'none' (66% compared to 49% of ABC1s), as were the youngest visitors (60% of 16-34s).
- Summer (59%) and Autumn visitors (56%) were more likely to have picked up info than Winter (22%) and Spring visitors (43%).
- Those most likely to mention picking up information at VICs were those who were interviewed at Glenmore (48%) and Atholl (43%) – VICs were the most popular source of information among visitors to these areas.

Visitor information picked up – by year

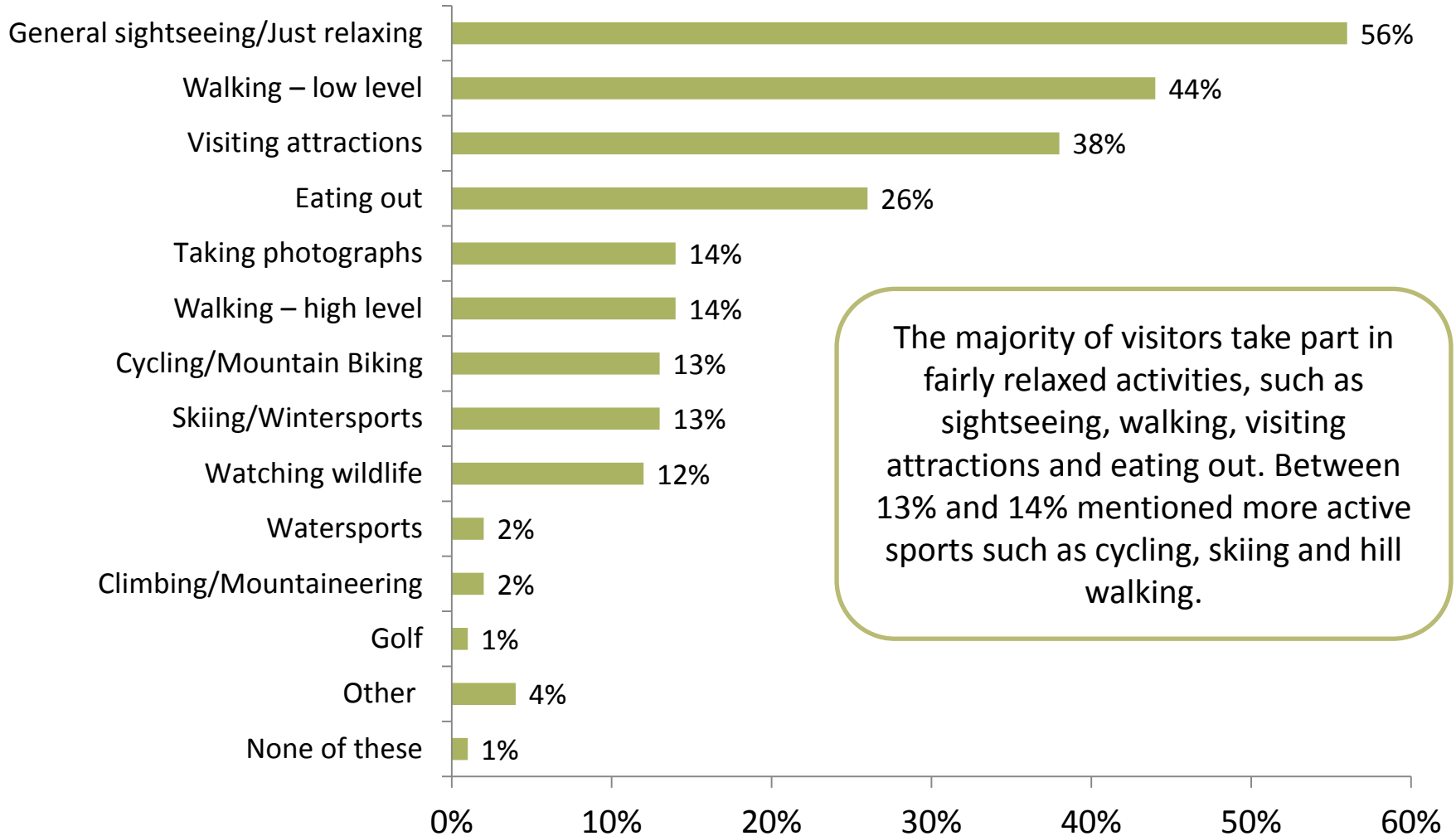


Summary: information sources

- Findings confirm that a combination of previous experience, word of mouth and the internet are key to informing visitors. Visitor Information Centres were also mentioned by one in ten visitors.
- The most commonly mentioned websites were VisitScotland, Google and the Cairngorms website.
- However, one in ten (10%) did not use any source of information before visiting.
- Respondents were more likely to have used information from the internet and VICs this year, and less likely to have used information from a previous visit, advice from friends/relatives or information from a travel agent or tour operator when compared with findings from 2009-10.
- Around half (49%) of respondents had picked up visitor information during their visit. The most commonly mentioned sources of information during the visit were VICs, visitor attractions and information from tourist businesses.
- Visitors were more likely to have picked up information during their visit than they were in 2009-10 (this is likely to be influenced by the lower proportion of residents in the 2014-15 sample).

Activities undertaken in the Cairngorms

Activities undertaken



The majority of visitors take part in fairly relaxed activities, such as sightseeing, walking, visiting attractions and eating out. Between 13% and 14% mentioned more active sports such as cycling, skiing and hill walking.

Activities undertaken

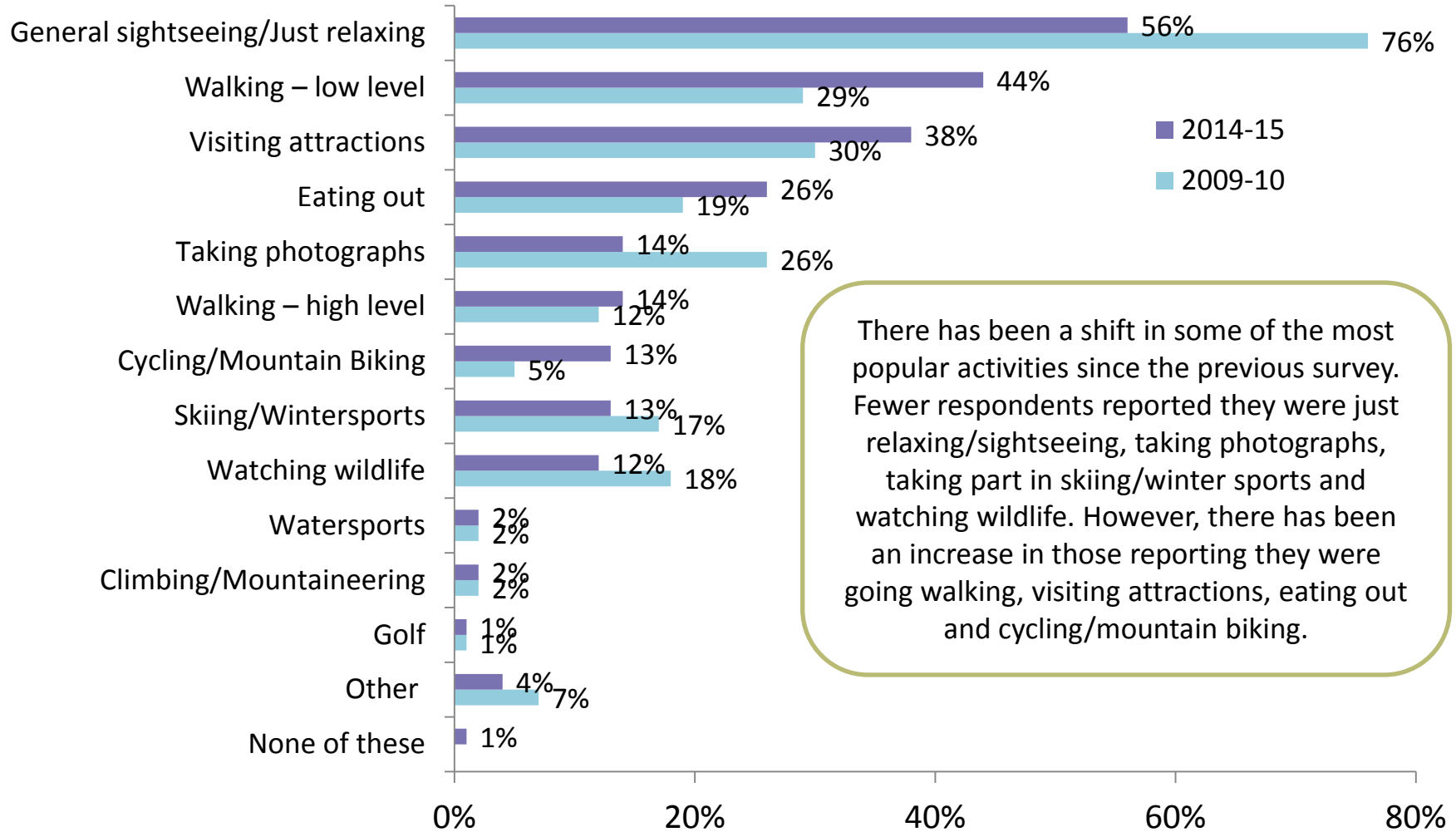
- Sub-group differences in relation to the activities undertaken during the visit included:
 - Those who were most likely to do **general sightseeing** were: first time visitors (72%), those on a longer trip (71%), overseas visitors (82%), visitors without children (60%), women (62%) and older visitors (68% of over 65s).
 - Those most likely to visit **attractions** were: those on a longer trip (52%), first time visitors (54%), overseas visitors (63%), those with children (55%) and women (45%).
 - Visitors most likely to take part in **skiing/winter sports** were: residents (26%) and those on a short break (21%), Scottish visitors (15%), visitors with children (19%), men (16%), younger visitors (23% of 16-34s).
- Activities differed significantly amongst visitors to different areas of the Cairngorms:
 - Walking (both low level and high level) was most popular amongst those visiting Angus (87% and 59% respectively).
 - Those visiting Atholl were most likely to do general sightseeing (71%) and to take photographs (31%).
 - Those most likely to visit attractions were those visiting Moray (60%) and Strathspey (59%).
 - Visitors to Aviemore were the most likely to mention skiing/wintersports (39%).
 - Cycling/mountain biking was more popular amongst those visiting Badenoch (29%) than visitors to other areas.

Activities undertaken – by season

	Summer	Autumn	Winter	Spring
General sightseeing / relaxing	61%	64%	29%	58%
Walking – low level	50%	46%	21%	47%
Visiting attractions	49%	47%	6%	32%
Eating out	26%	22%	24%	31%
Taking photos	14%	18%	4%	15%
Walking – high level	16%	15%	9%	15%
Cycling / mountain biking	17%	12%	2%	12%
Skiing / winter sports	0%	0%	66%	14%
Watching wildlife	14%	14%	1%	13%

As expected, different activities predominate at different times of year. Winter visitors are very much focussed on winter sports, with few other activities undertaken. Spring, Summer and Autumn visitors undertake a range of activities but predominantly visit Cairngorms for general sightseeing and relaxing, along with low level walking.

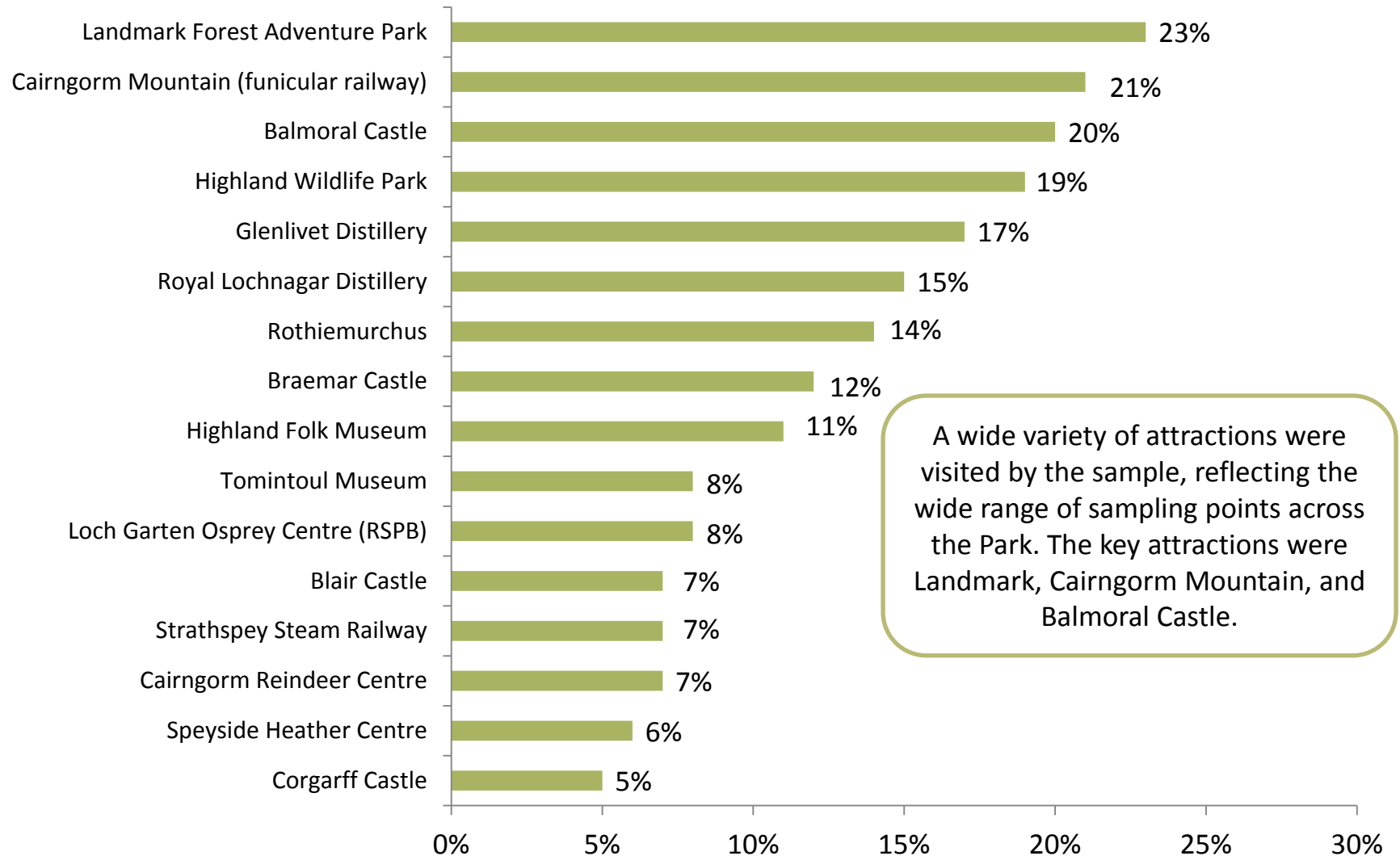
Activities undertaken – by year



There has been a shift in some of the most popular activities since the previous survey. Fewer respondents reported they were just relaxing/sightseeing, taking photographs, taking part in skiing/winter sports and watching wildlife. However, there has been an increase in those reporting they were going walking, visiting attractions, eating out and cycling/mountain biking.

Top attractions visited

(% of those who had visited an attraction)

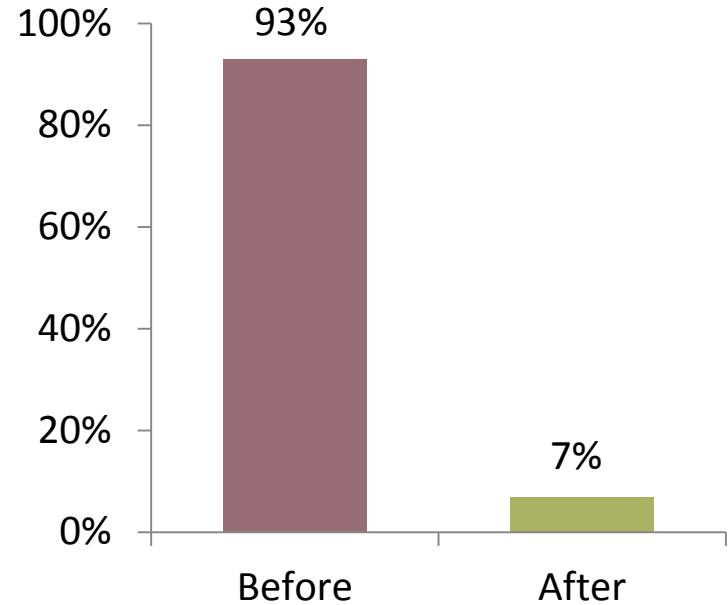
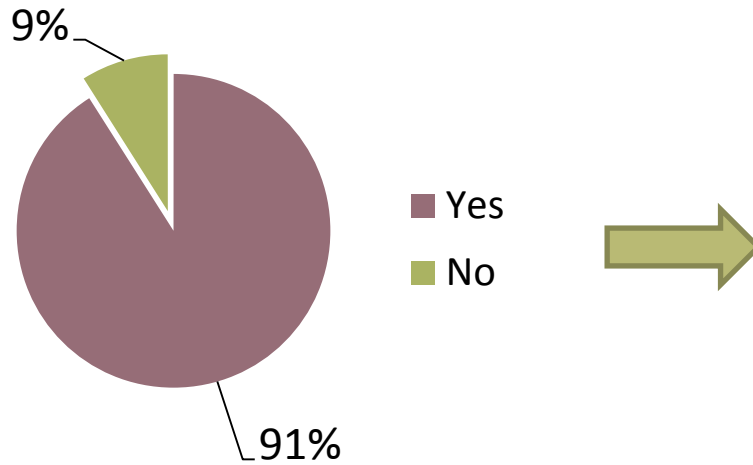


Summary: activities

- The most common activities undertaken during respondents' visit to the Cairngorms were:
 - General sightseeing (56%)
 - Walking – low level (44%)
 - Visiting attractions (38%)
 - Eating out (26%).
- A substantial minority (between 13% and 14%) mentioned more active sports such as cycling, skiing and hill walking – and there was a clear seasonal pattern in responses about activities, as would be expected.
- There has been a shift in some of the most popular activities since the previous survey. Fewer respondents reported they were just relaxing/sightseeing, taking photographs, taking part in skiing/winter sports and watching wildlife. However, there has been an increase in those reporting they were going walking, visiting attractions, eating out and cycling/mountain biking since 2009-10.
- Among those who visited attractions, the most frequently mentioned were:
 - Landmark Forest Adventure Park (mentioned by 23% of those who had visited attractions)
 - Cairngorm Mountain (Funicular railway) (21%)
 - Balmoral Castle (20%)
 - Highland Wildlife Park (19%)
 - Glenlivet Distillery (17%).

Awareness of the National Park

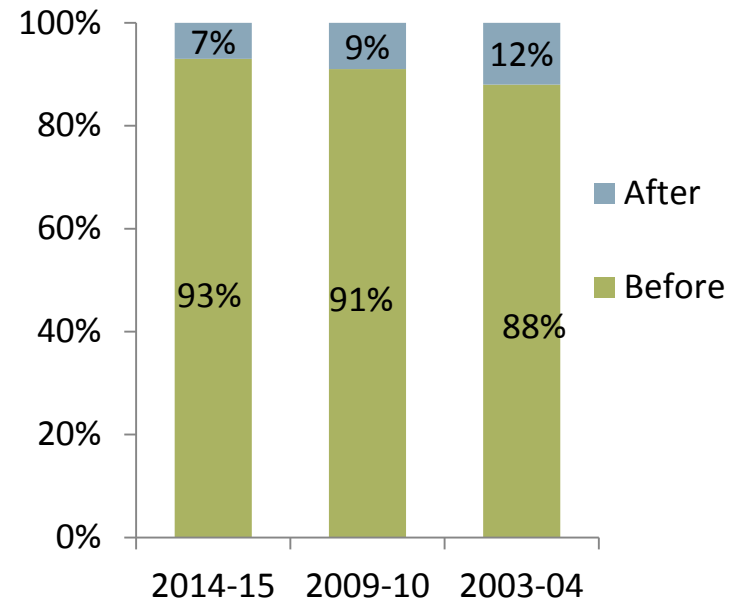
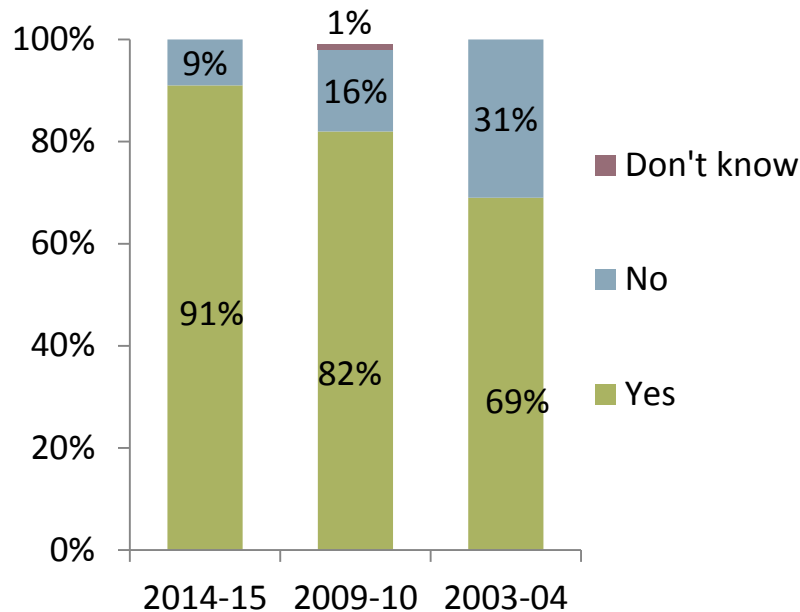
Awareness of being in a National Park



Awareness was highest among: those visiting Glenmore (98%), those on a short break (94%), repeat visitors (95%), rest of UK (94%), Scottish visitors (94%) and those with children (94%). Awareness was consistent across seasons.

National Park status is well understood by visitors before they travel to Cairngorms – this is to be expected given that many were repeat visitors. However, awareness is also high for first time visitors → 83% aware, with 84% of these aware before travelling = 70% of all first time visitors aware before visit.

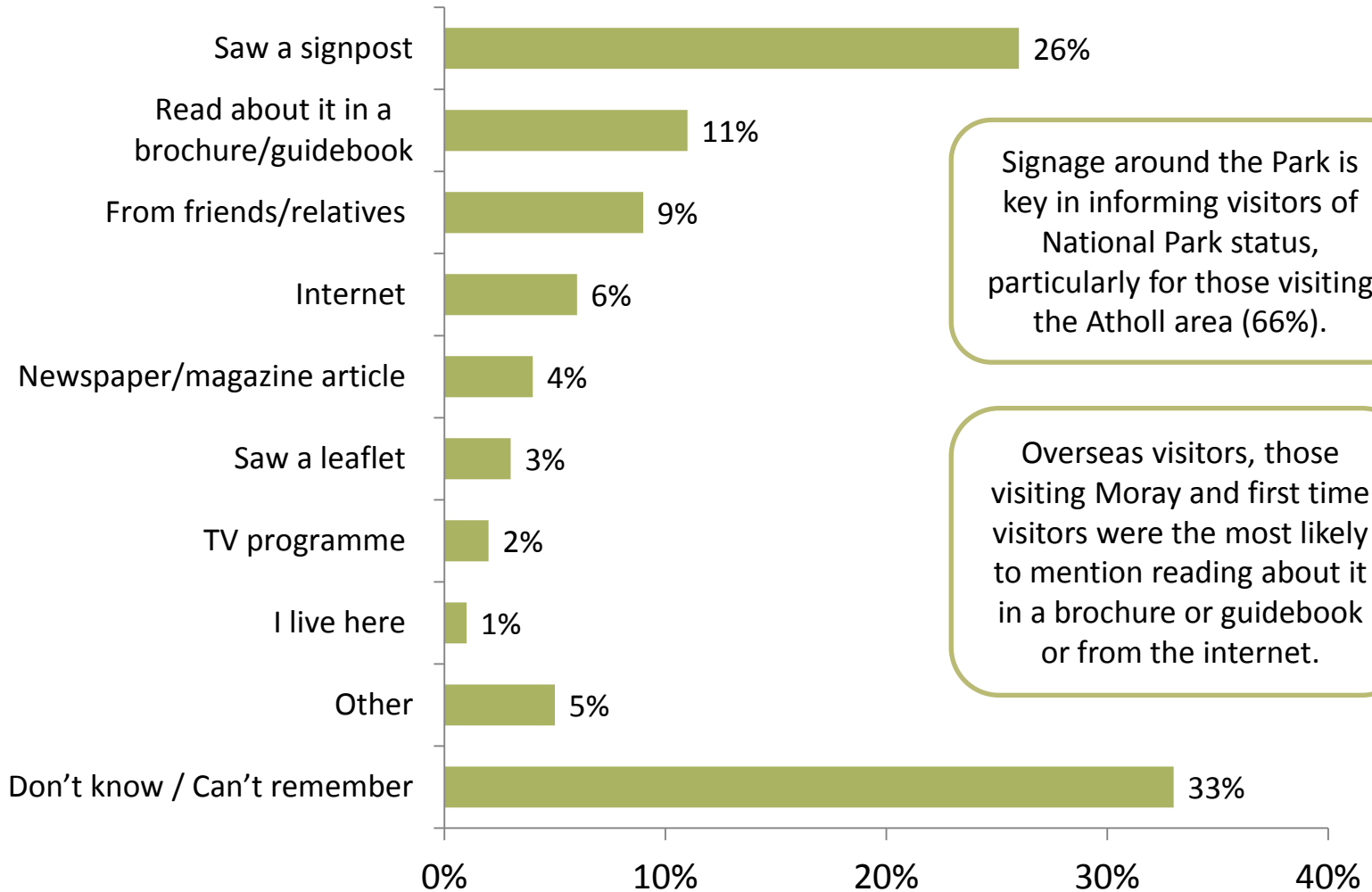
Awareness of being in a National Park – by year



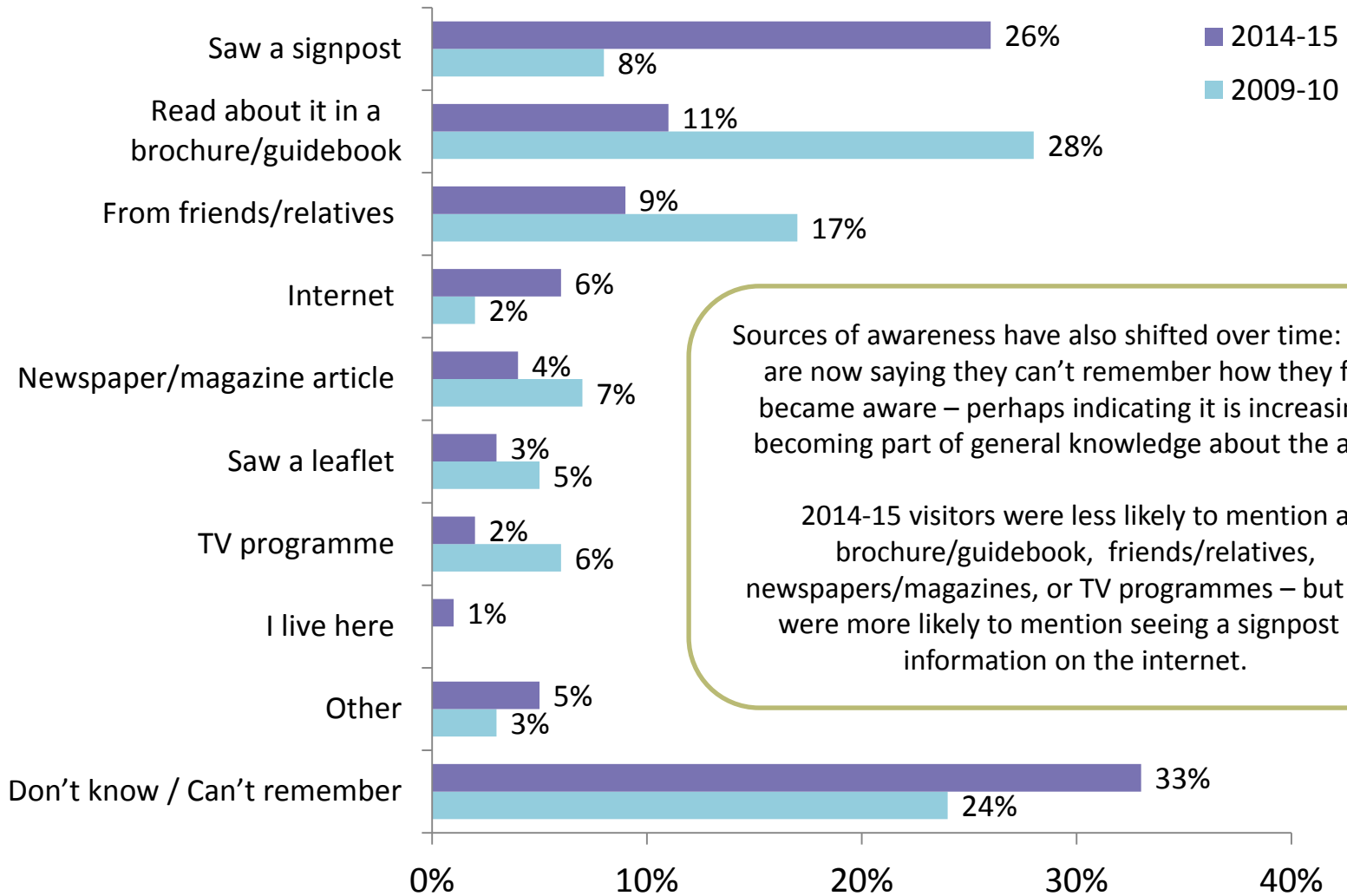
Awareness has been increasing over time – only 9% were not aware they were in a National Park in 2014-15, compared to 31% in 2003-04.

Respondents are now more likely to have been aware of the area's National Park status **before** visiting the area.

Sources of awareness of National Park



Sources of awareness of National Park – by year

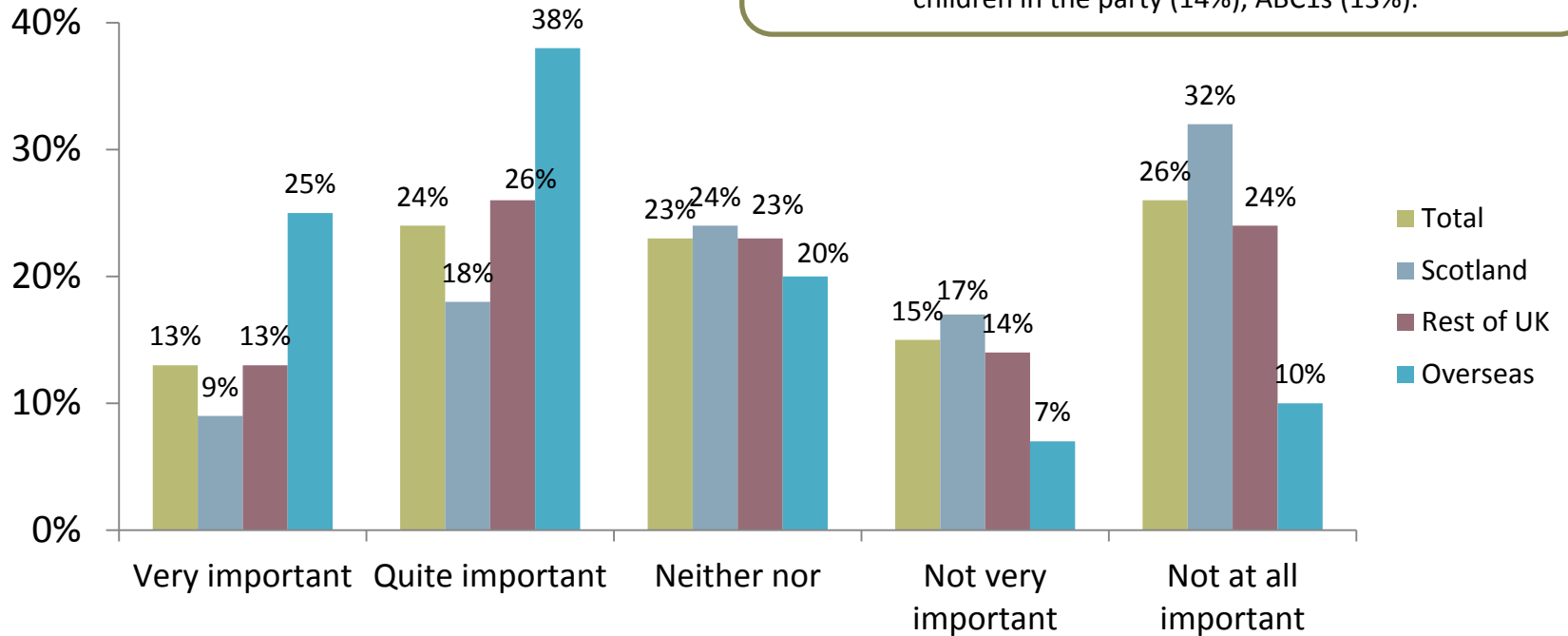


Sources of awareness have also shifted over time: fewer are now saying they can't remember how they first became aware – perhaps indicating it is increasingly becoming part of general knowledge about the area.

2014-15 visitors were less likely to mention a brochure/guidebook, friends/relatives, newspapers/magazines, or TV programmes – but they were more likely to mention seeing a signpost or information on the internet.

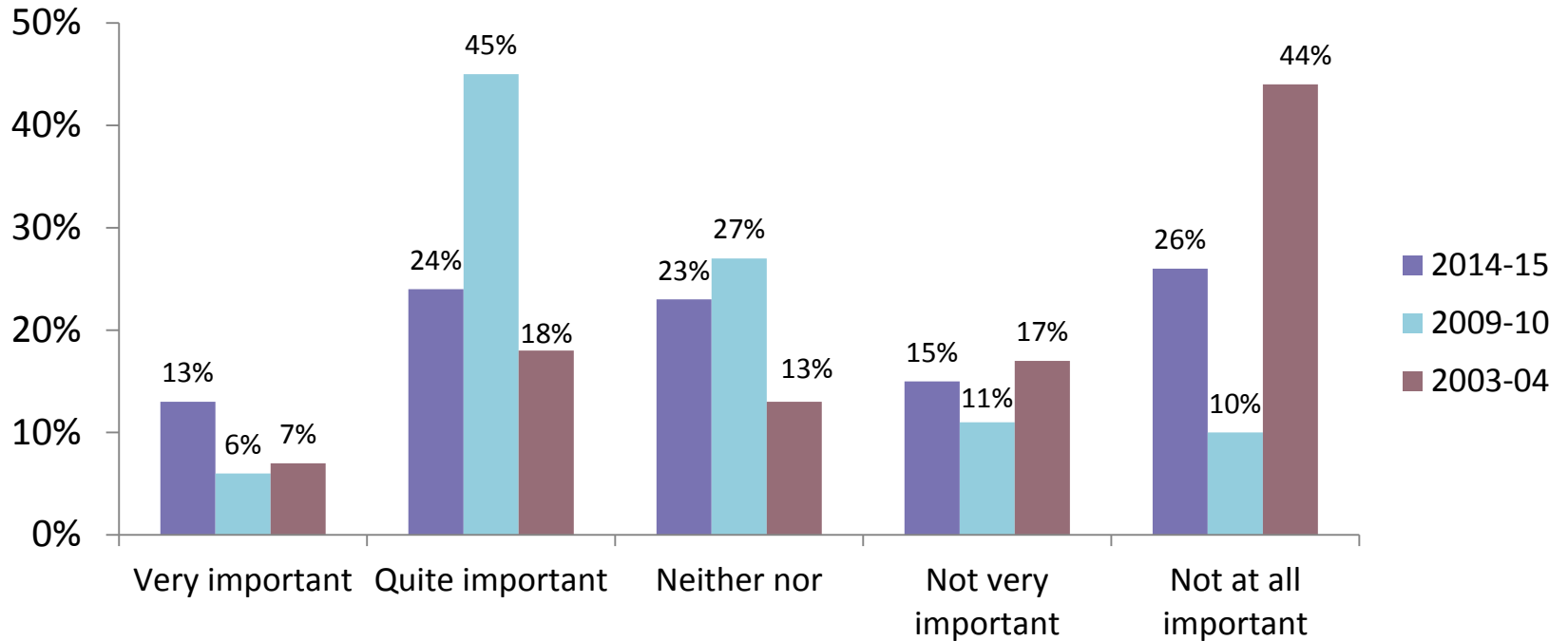
Importance of National Park status to decision to visit

National Park status was most influential for: those on a longer trip (17% saying 'very important'), first time visitors (18%), overseas visitors and those visiting Moray (25%), those without children in the party (14%), ABC1s (13%).



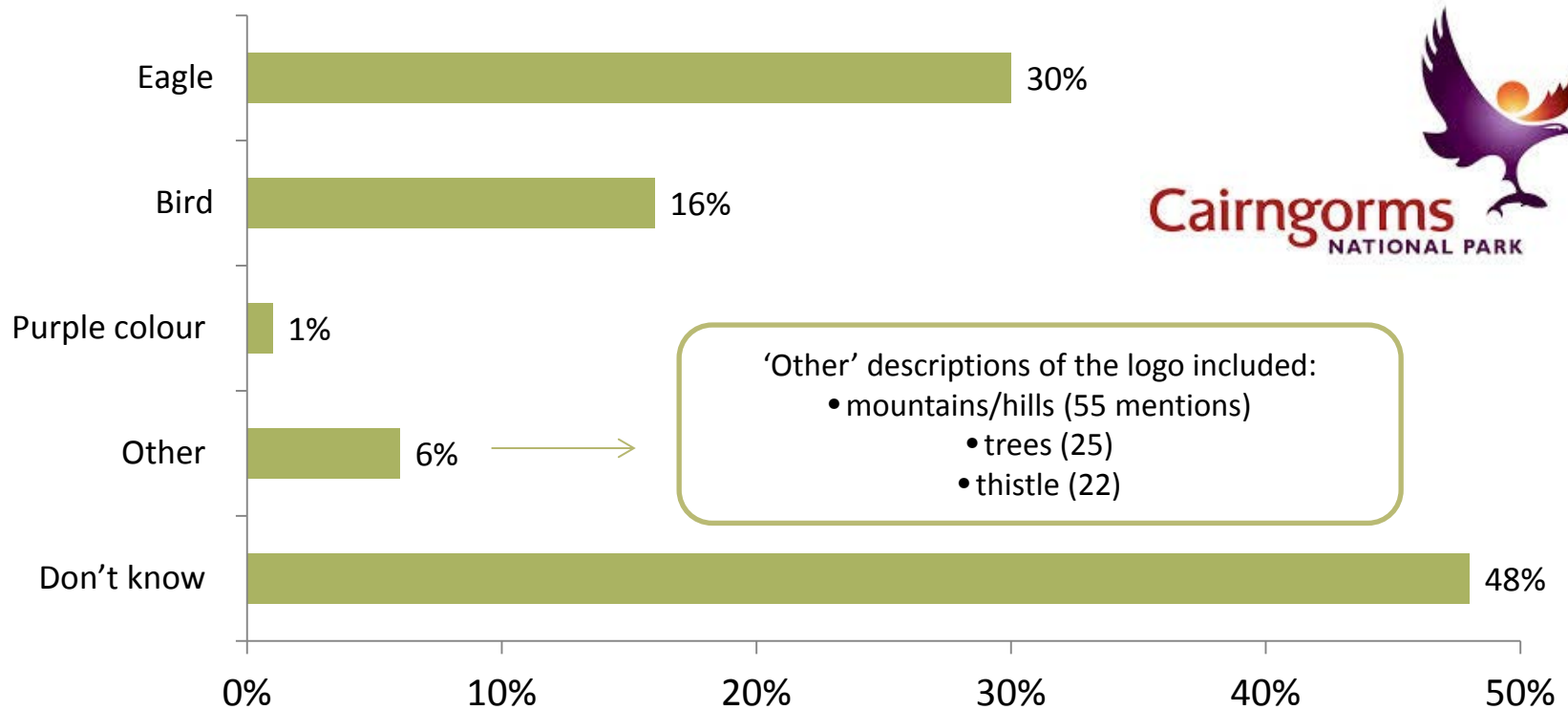
National Park status is a clear indicator of the quality of the Cairngorms area to those who are less familiar with it, particularly overseas visitors. The majority of overseas visitors (63%) stated it as important to their decision to visit, while 39% of visitors from other parts of the UK were similarly influenced.

Importance of National Park status to decision to visit – by year



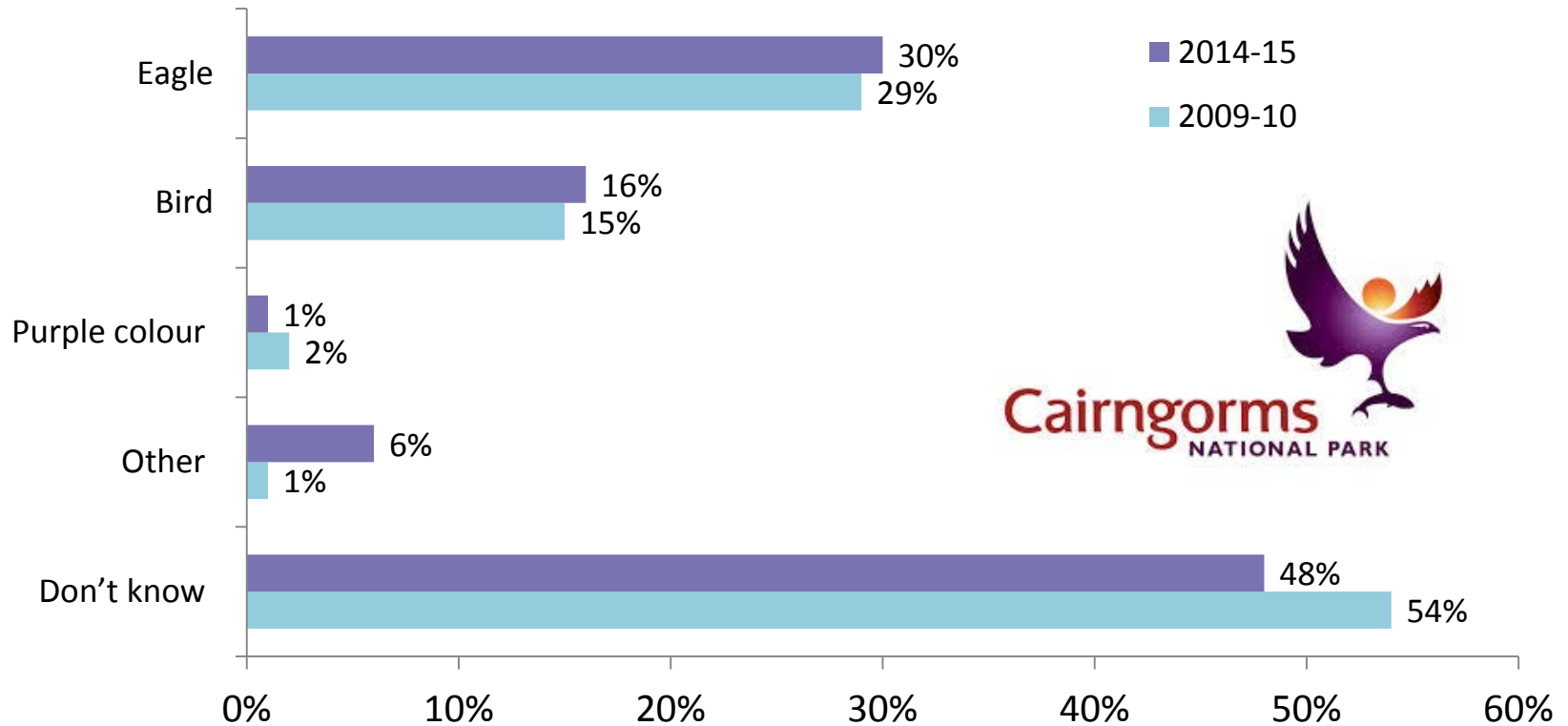
Findings across the previous three surveys fluctuated in relation to the importance of National Park status in making the decision to visit. There was a peak in 2009-10 of respondents saying it was very or quite important (51%, compared to 25% in 2003-04 and 37% in 2014-15).

Awareness of the National Park logo



Just under a third (30%) mentioned an eagle and 16% identified a bird as being part of the CNPA logo. However, the most common response was that they did not know what the logo looked like. Residents and day trippers were more likely than those on a shorter or longer break to be able to describe some aspect of the logo.

Awareness of the National Park logo – by year



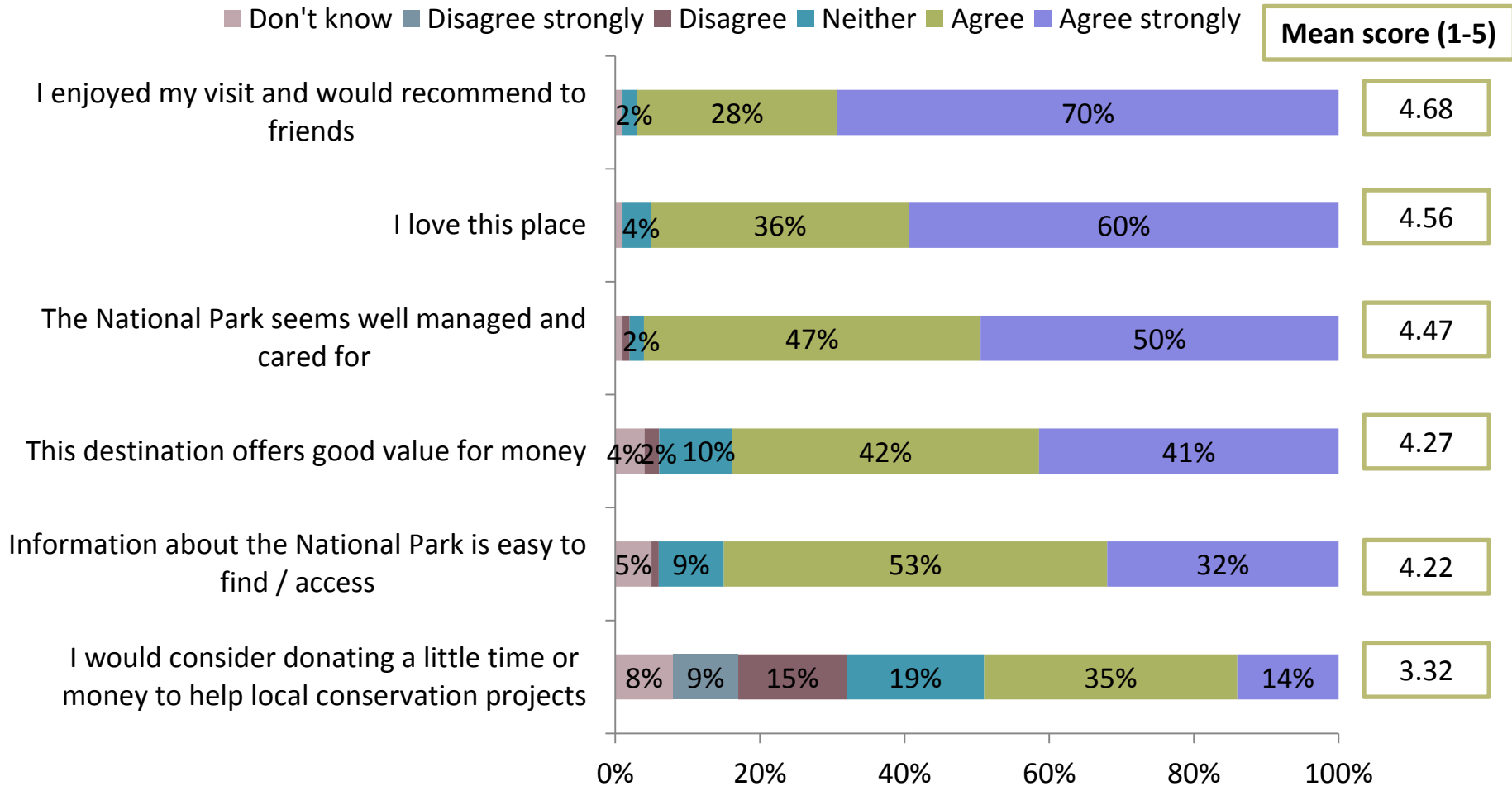
Awareness of the logo was fairly stable across time, although fewer respondents this year said they did not know what the logo looked like. The proportions identifying an eagle or a bird were very similar in the 2009-10 and 2014-15 surveys.

Summary: awareness of National Park

- Awareness of being in a National Park was high (91% were aware), with most of these being aware before they visited (93%). Even first time visitors showed good levels of prior awareness of National Park status.
- This awareness has also been increasing over time – only 9% were not aware they were in a National Park in 2014-15, compared to 31% in 2003-04.
- Sources of information about the National Park's status have also shifted over time, with fewer now saying they can't remember how they first became aware – perhaps indicating it is increasingly becoming part of general knowledge about the area.
- Among those who did identify an information source, signage around the Park is key in informing visitors of the area's National Park status.
- National Park status is a clear indicator of the quality of the Cairngorms area to those who are less familiar with it, particularly overseas visitors. The majority of overseas visitors (63%) stated it was important to their decision to visit, and 39% of visitors from other parts of the UK were similarly influenced.
- However, knowledge of the CNPA logo was fairly limited – although three in ten (30%) mentioned an eagle and 16% identified a bird as being part of the CNPA logo, the most common response was that respondents did not know what the logo looked like. This response has remained fairly stable since the previous survey.

Perceptions of the National Park

Perceptions of Cairngorms National Park



Very positive appraisal by visitors – almost all in agreement that they love Cairngorm National Park and would recommend it to friends. The Park is also perceived as well managed and good value for money.

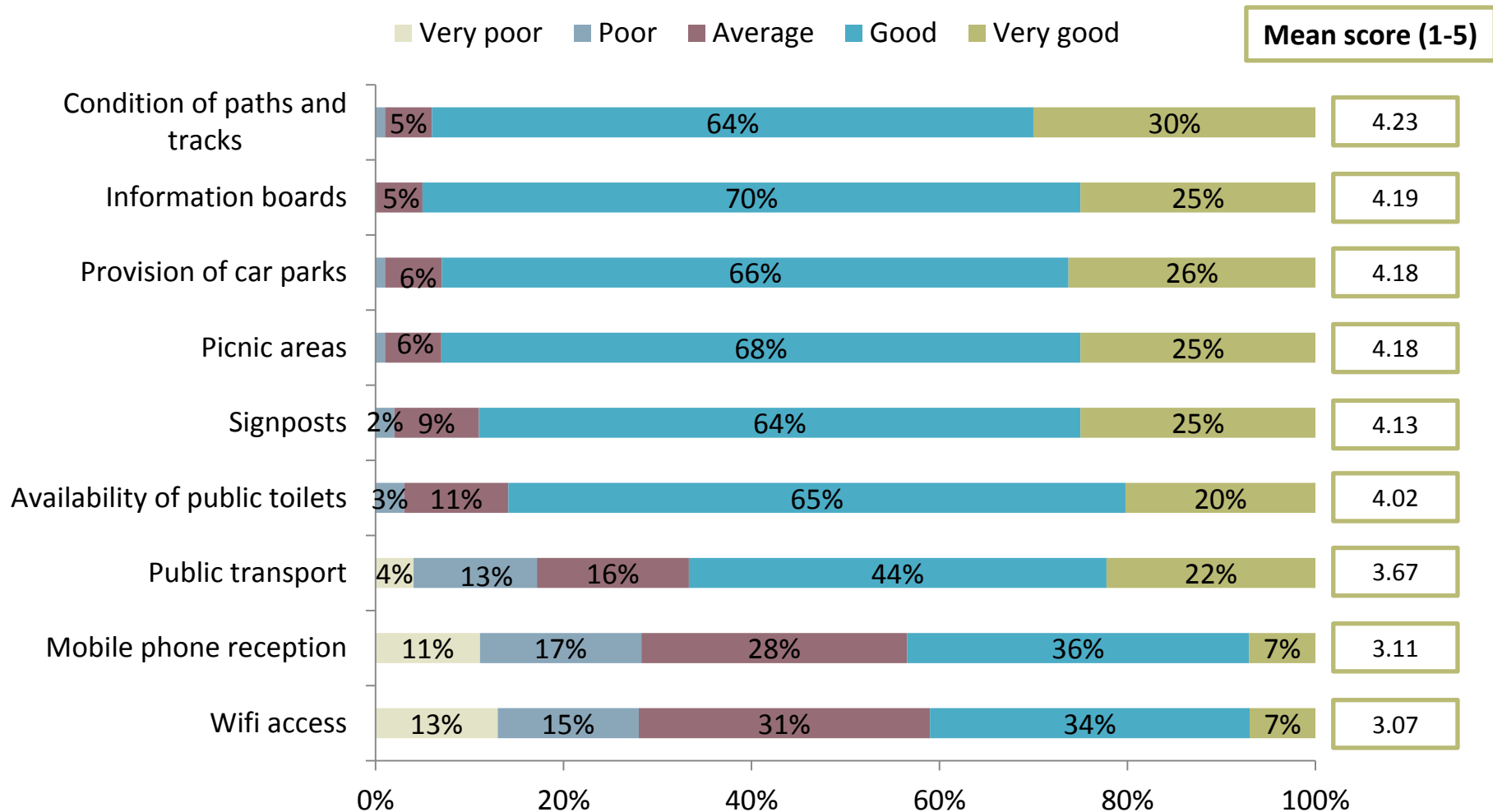
Perceptions of Cairngorms National Park – by year

Perceptions of the National Park	2014-15	2009-10	2014-15	2009-10	2014-15	2009-10
	AGREE		AGREE STRONGLY		TOTAL AGREE/AGREE STRONGLY	
The Park seems well managed and cared for	47%	68%	50%	20%	97%	88%
Information about the National Park is easy to find / access	53%	59%	32%	25%	85%	84%

The question set was different in the previous survey, but two questions are comparable: ‘The National Park seems well managed and cared for’ and ‘Information about the National Park is easy to find / access’.

For both of these statements, there has been an improvement in ratings since 2009-10. There has been a movement from ‘agree’ to ‘agree strongly’ for both of these aspects. Overall agreement has also increased, particularly for the statement that the Park seems well managed and cared for (97% agreeing/strongly agreeing compared to 88% in the last survey).

Rating of facilities



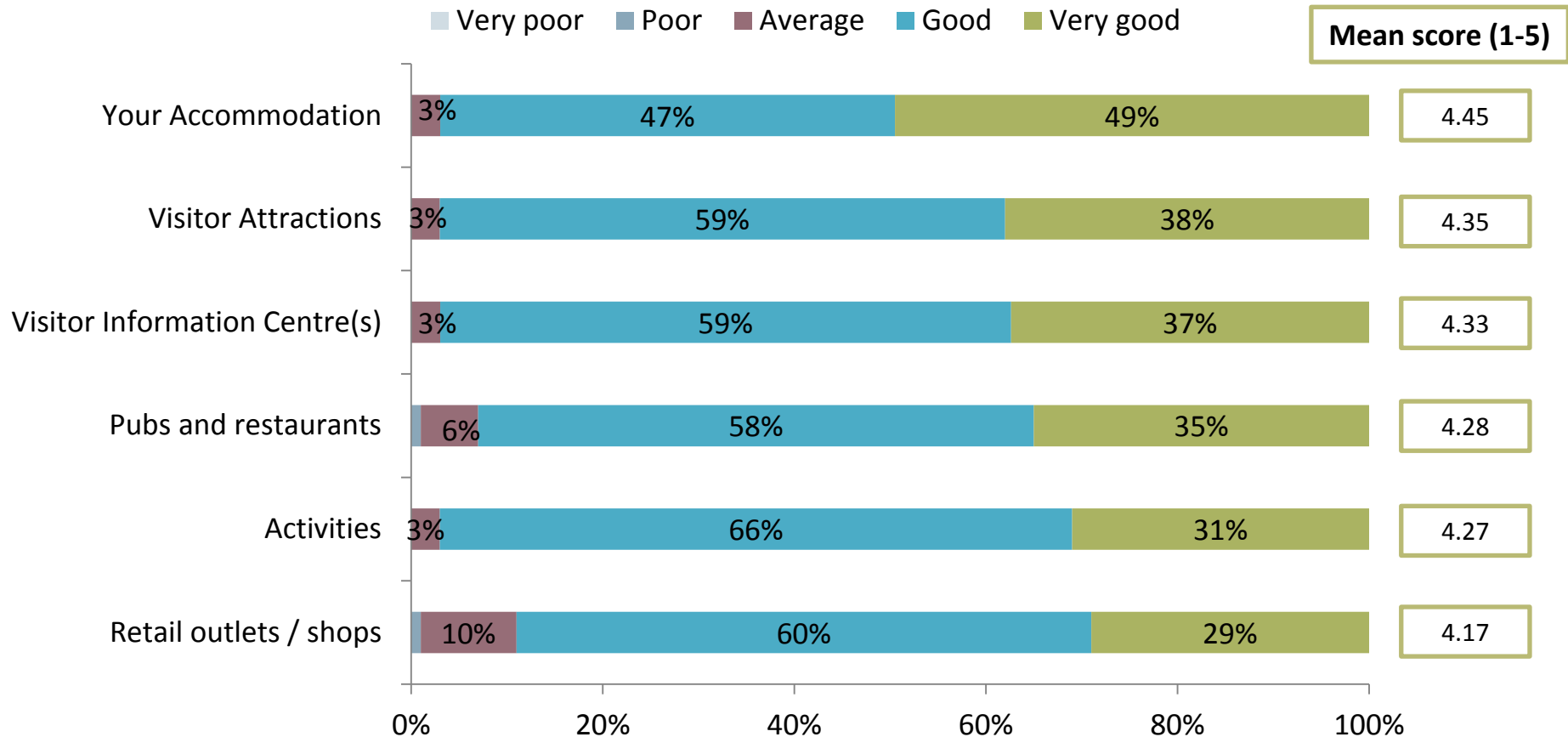
The majority of facilities were highly rated although there is scope to move scores further into 'very good'. The only aspects showing some dissatisfaction were mobile phone reception and Wi-Fi access.

Rating of facilities – by year

Facilities	2014-15	2009-10	2014-15	2009-10	2014-15	2009-10
	GOOD		VERY GOOD		TOTAL GOOD / VERY GOOD	
Condition of paths and tracks	64%	62%	30%	17%	94%	79%
Information boards	70%	70%	25%	13%	95%	83%
Provision of car parks	66%	68%	26%	17%	92%	85%
Picnic areas	68%	73%	25%	11%	93%	84%
Signposts	64%	69%	25%	21%	89%	90%
Availability of public toilets	65%	57%	20%	5%	85%	62%
Public transport	44%	44%	22%	7%	66%	51%

Ratings across all aspects of the facilities have improved since the 2009-10 survey, as shown in the tables above. The differences appear to be driven by a shift towards ratings of 'very good'.

Rating of customer service



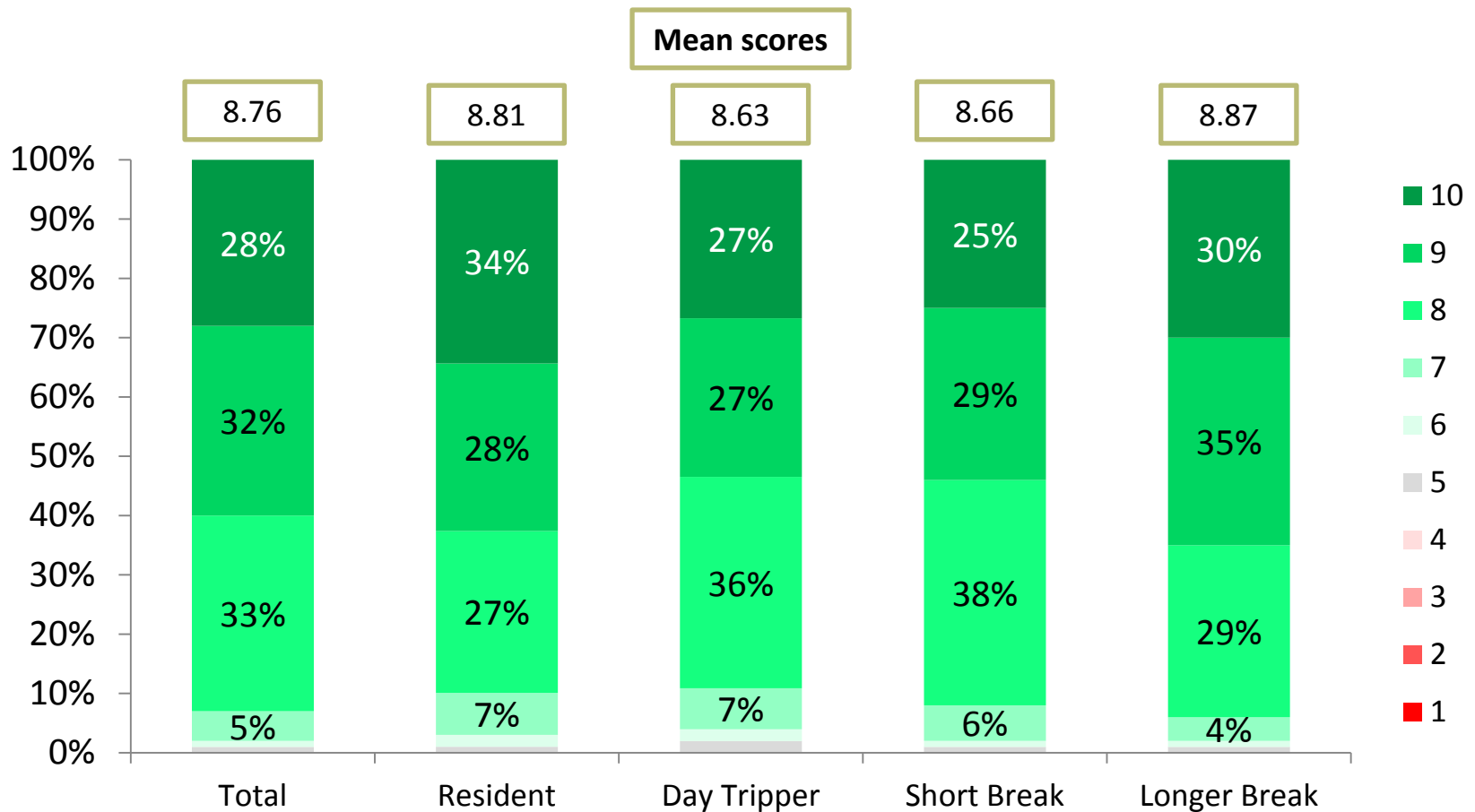
Almost all visitors rated customer service positively across all categories. The only scope for improvement would be to exceed visitor expectations and move scores from 'good' into 'very good'.

Rating of customer service – by year

Customer service	2014-15	2009-10	2014-15	2009-10	2014-15	2009-10
	GOOD		VERY GOOD		TOTAL GOOD / VERY GOOD	
Your Accommodation	47%	52%	49%	40%	96%	92%
Visitor Attractions	59%	58%	38%	38%	97%	96%
Visitor Information Centre(s)	59%	70%	37%	21%	96%	91%
Pubs and restaurants	58%	63%	35%	32%	93%	95%
Activities	66%	46%	31%	15%	97%	61%
Retail outlets / shops	60%	49%	29%	8%	89%	57%

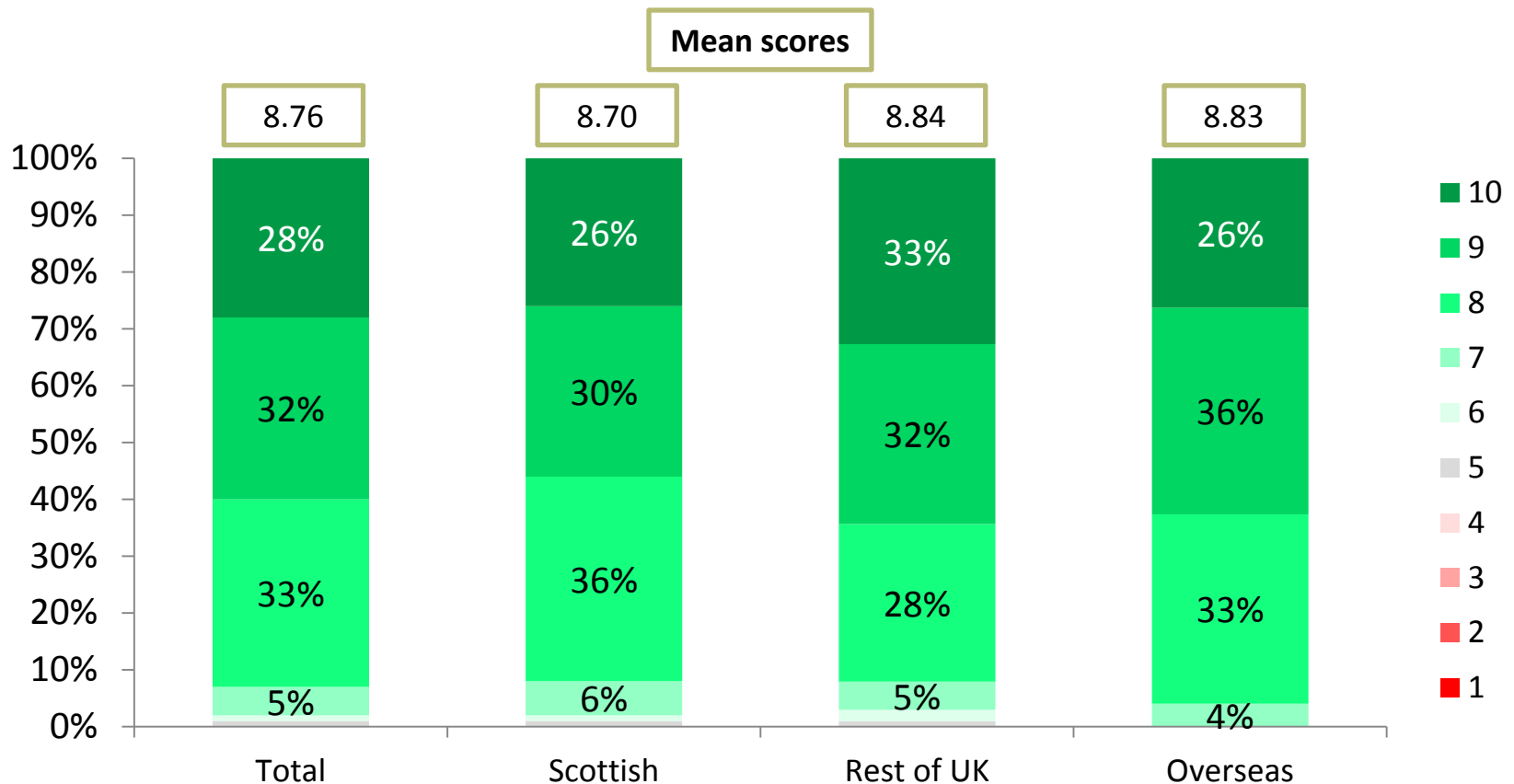
Ratings of customer service have generally improved since the previous survey, again driven by a shift towards ratings of 'very good'.

Rating of overall visit – by visitor type



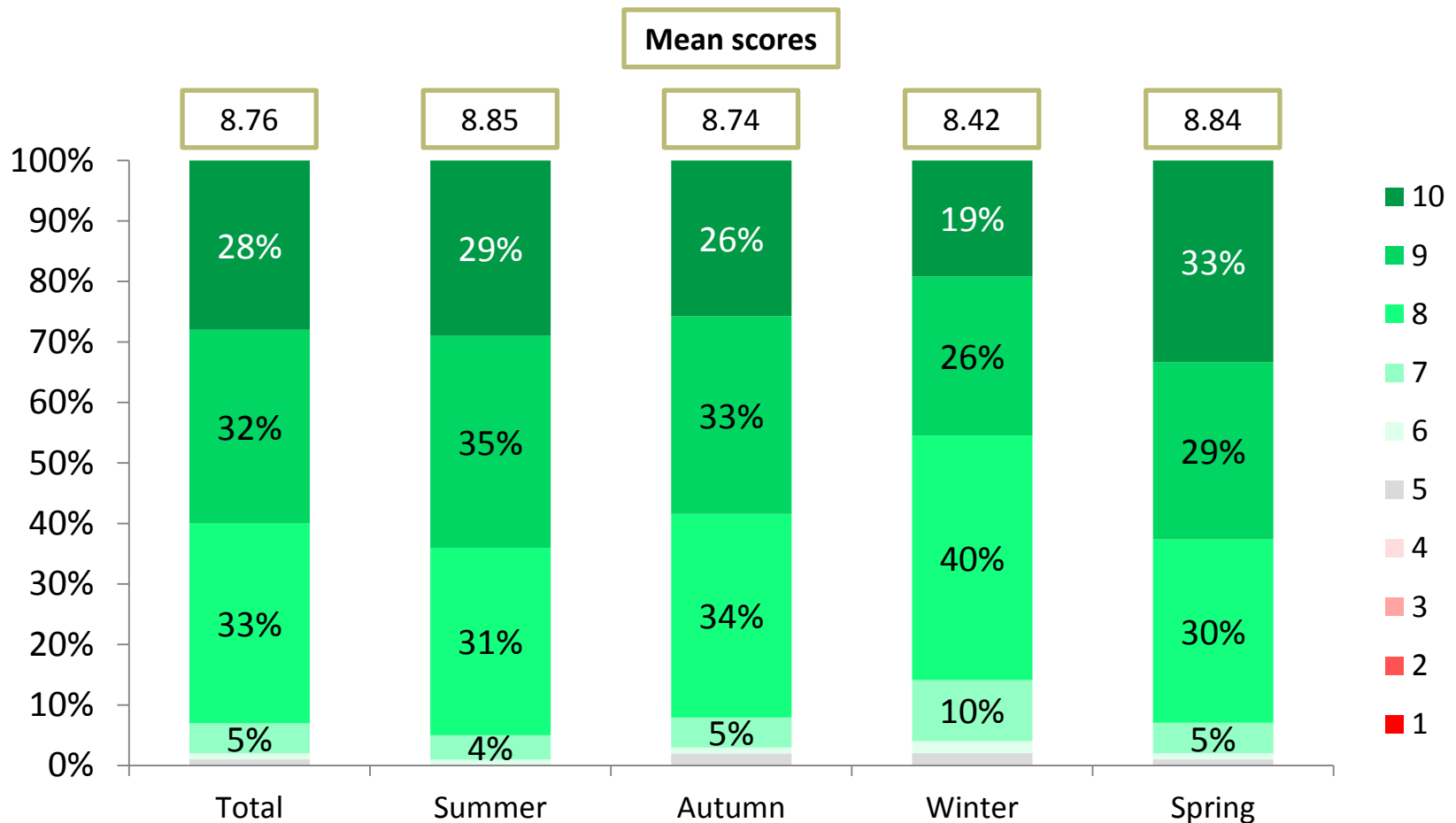
Almost all visitors rate their overall visit with 8, 9 or 10 out of 10, with an overall mean score 8.76 → a very high satisfaction rating! Residents and those on a longer break were the most satisfied.

Rating of overall visit – by origin



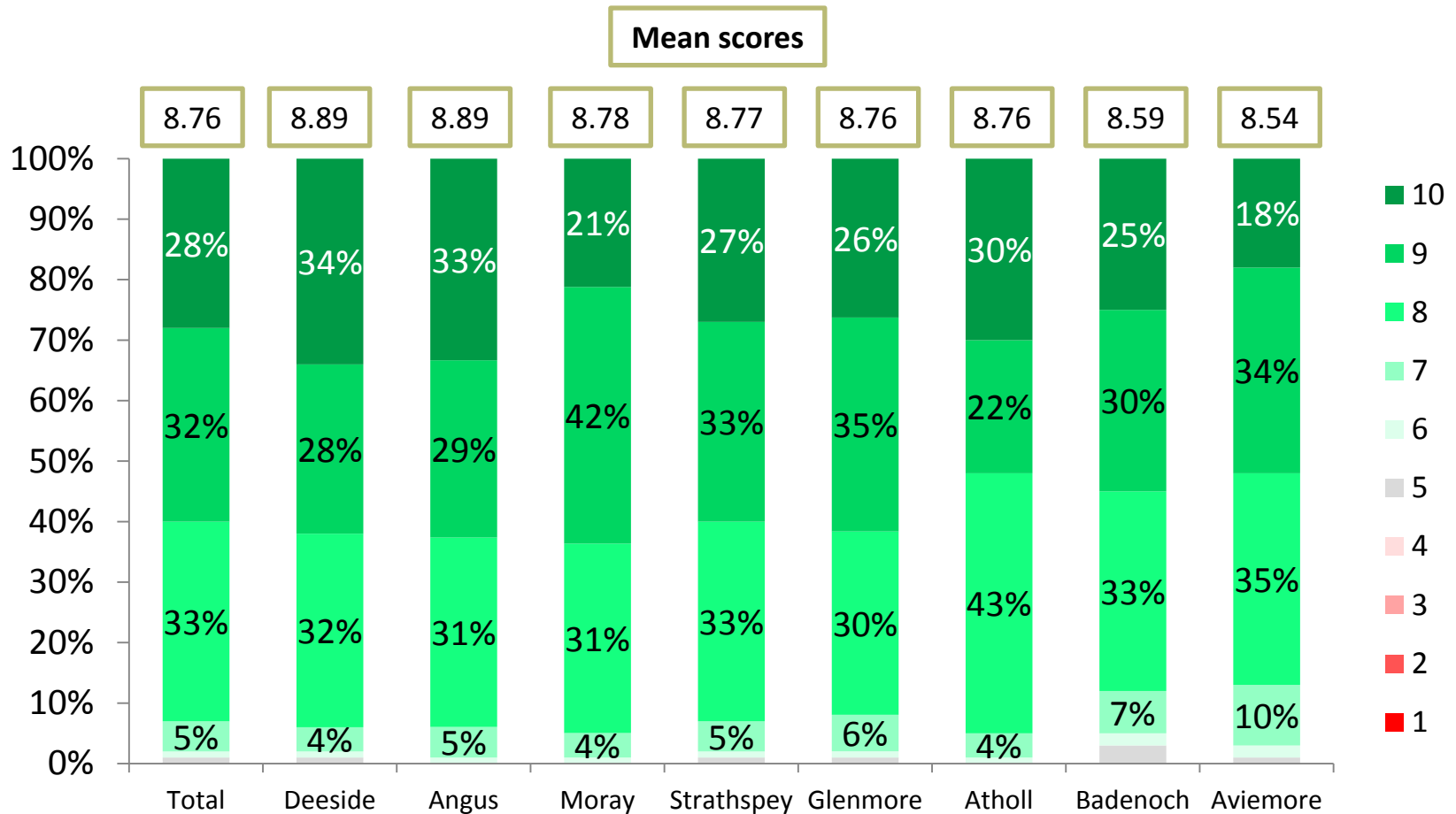
Overall visit ratings were highest among visitors from the rest of the UK and from overseas, with Scottish visitors giving a significantly lower rating (although still a high score of 8.70 out of 10).

Rating of overall visit – by season



Consistently high levels of satisfaction were seen across the year. Spring, Summer and Autumn visitors were slightly more satisfied than Winter visitors.

Rating of overall visit – by area



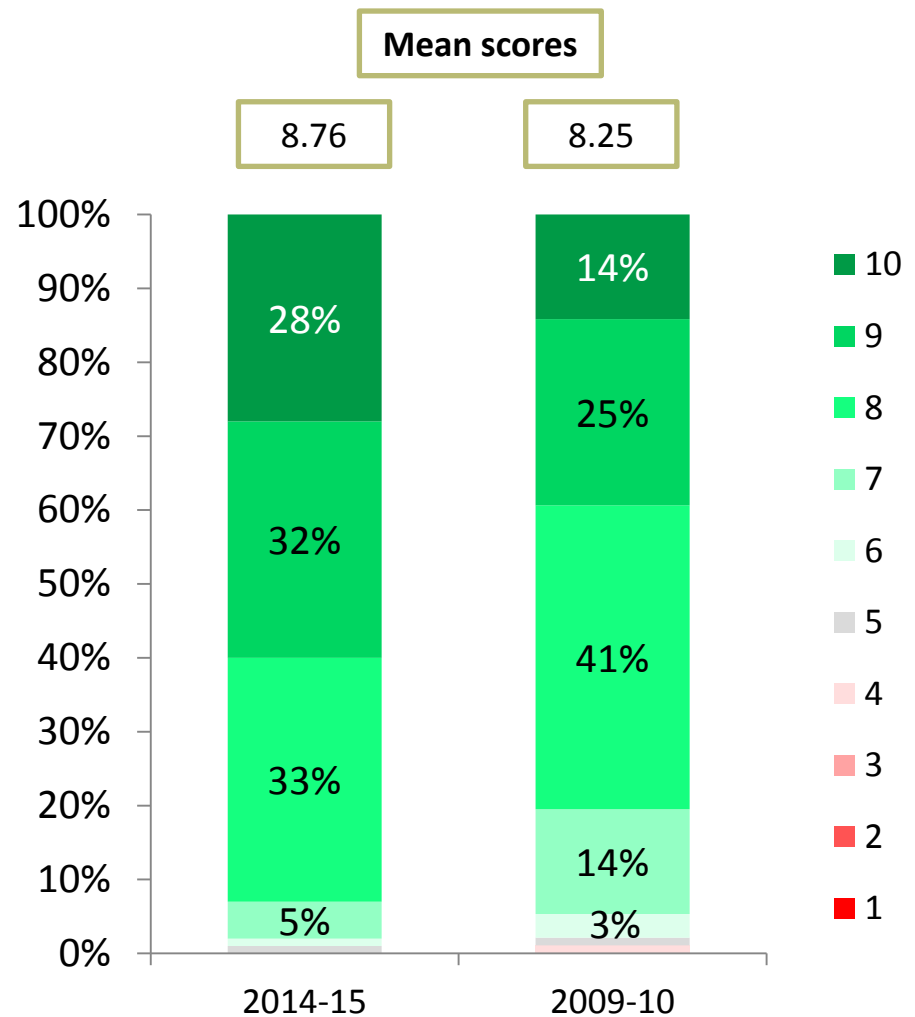
High levels of satisfaction were reported in all areas of the Cairngorms, with visitors to Deeside and Angus expressing higher levels of satisfaction than visitors to other areas.

Rating of overall visit – by year

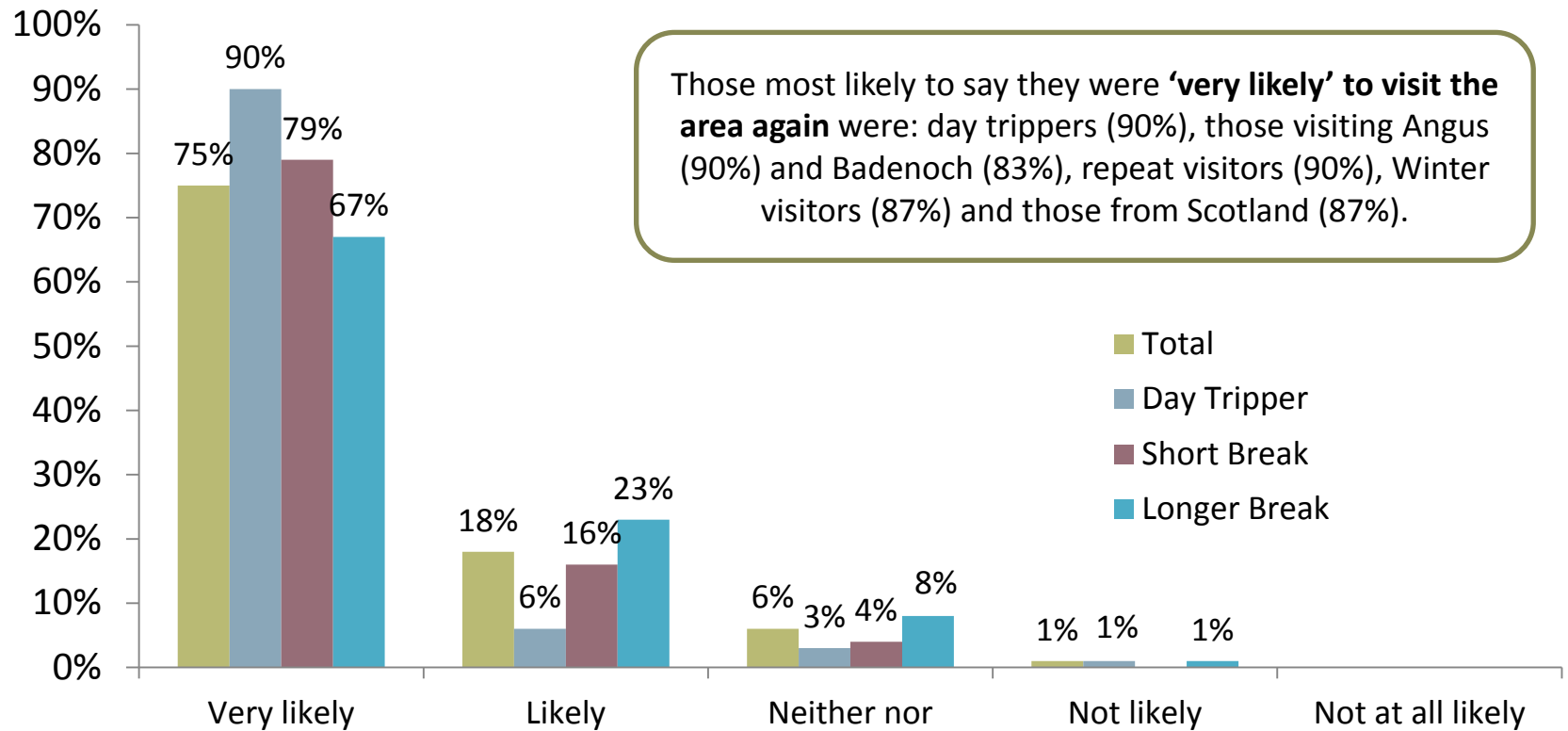
There has been a statistically significant increase in the overall visit ratings since the previous survey.

In 2014-15, 93% of respondents gave a score of at least 8 out of 10 (mean score 8.76). In 2009-10, this figure was 80% (mean score 8.25).

This appears to be driven at least in part by the differing respondent profile in 2009-10 – residents made up almost a quarter of the sample and their mean score was 7.98. Visitors in 2009-10 gave a mean score of 8.32.



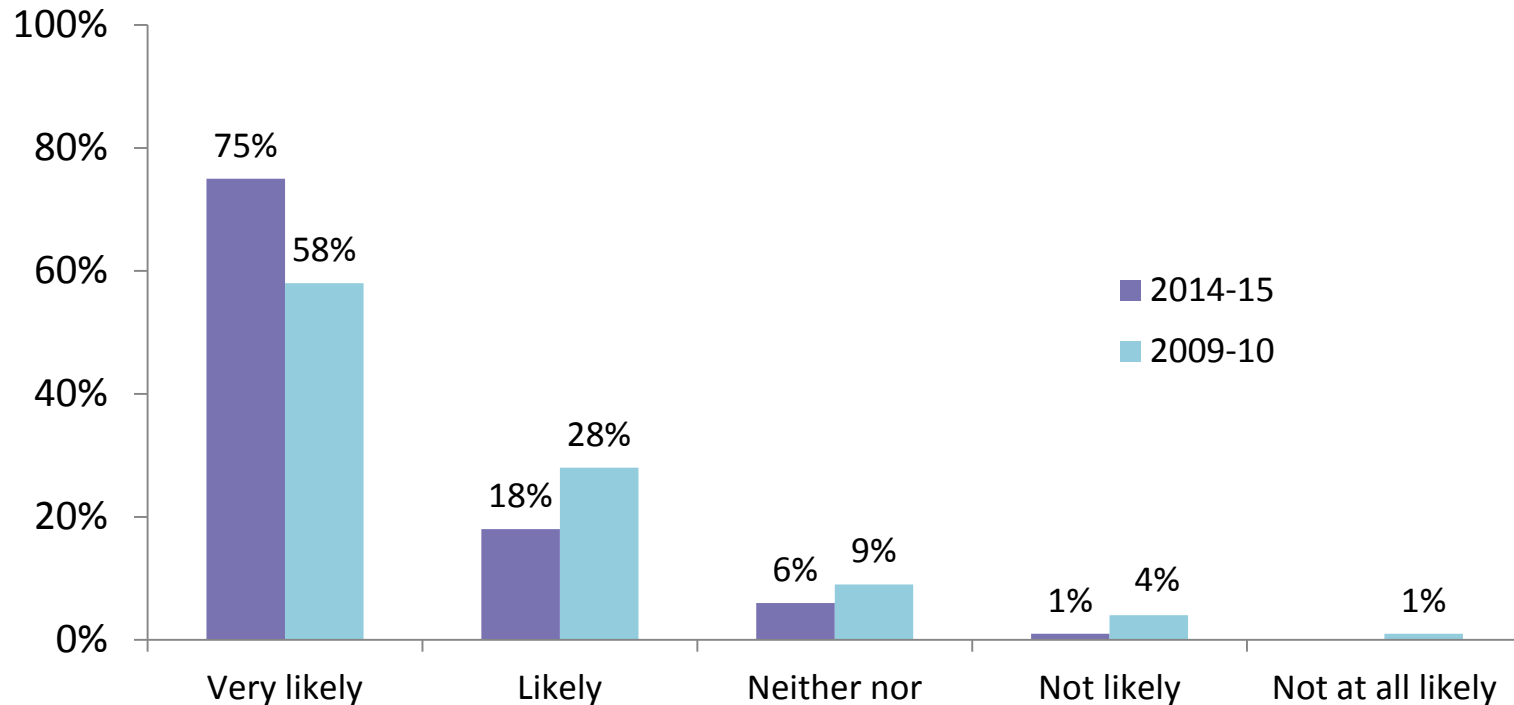
Likelihood to visit again



Those most likely to say they were **'very likely'** to visit the area again were: day trippers (90%), those visiting Angus (90%) and Badenoch (83%), repeat visitors (90%), Winter visitors (87%) and those from Scotland (87%).

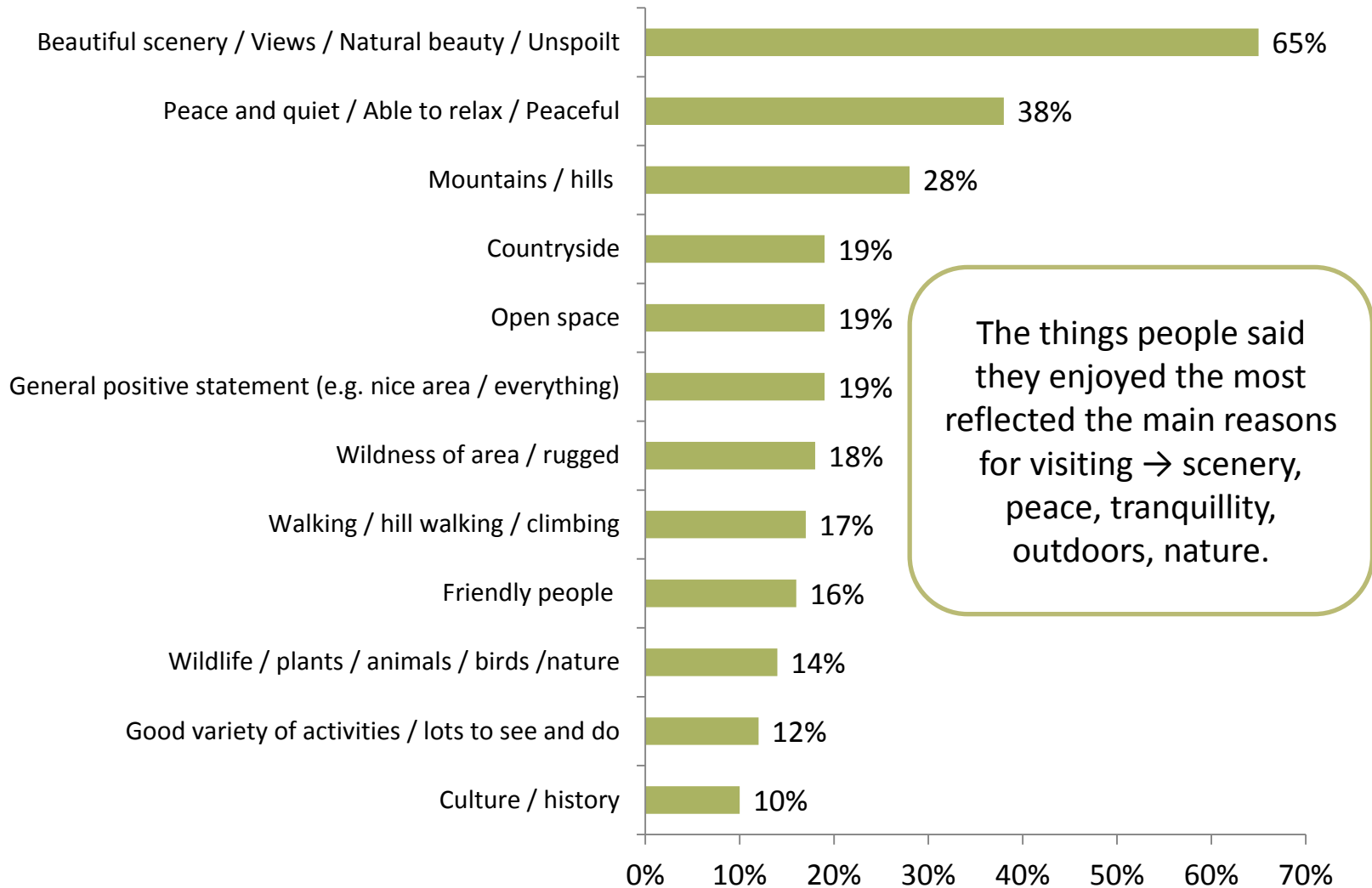
It is a reflection of high levels of satisfaction that the majority of visitors intend to return to the Cairngorms National Park in the future. As expected, those who live in Scotland (87% very likely) are the most likely to express an intention to return, but even amongst people from the rest of the UK (69% very likely) and overseas (51% likely) many also reported an intention to return.

Likelihood to visit again – by year

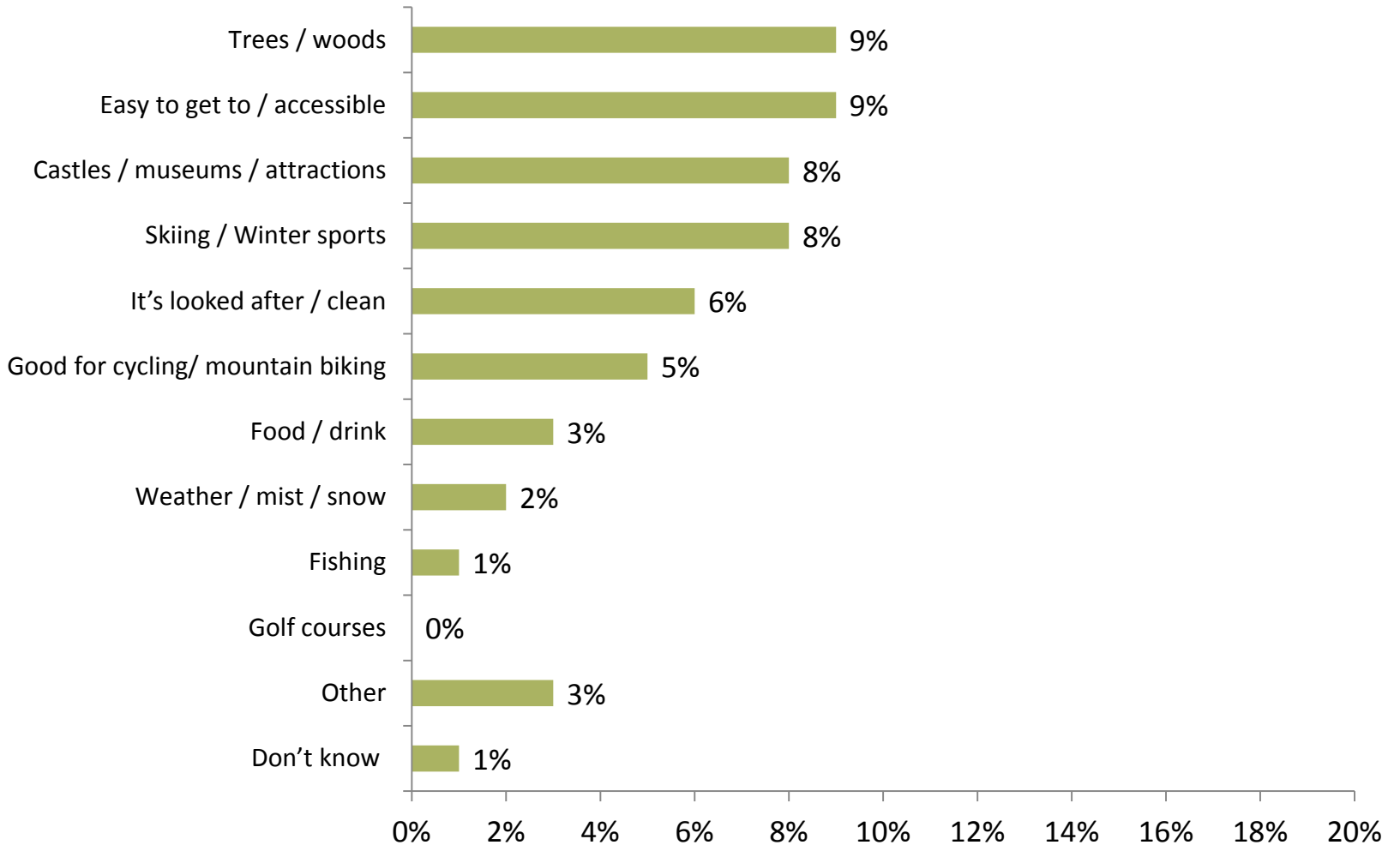


Likelihood to visit again has increased in 2014-15 – 93% said they were likely or very likely to visit again, compared to 86% in the 2009-10 survey.

Aspects enjoyed most (1)



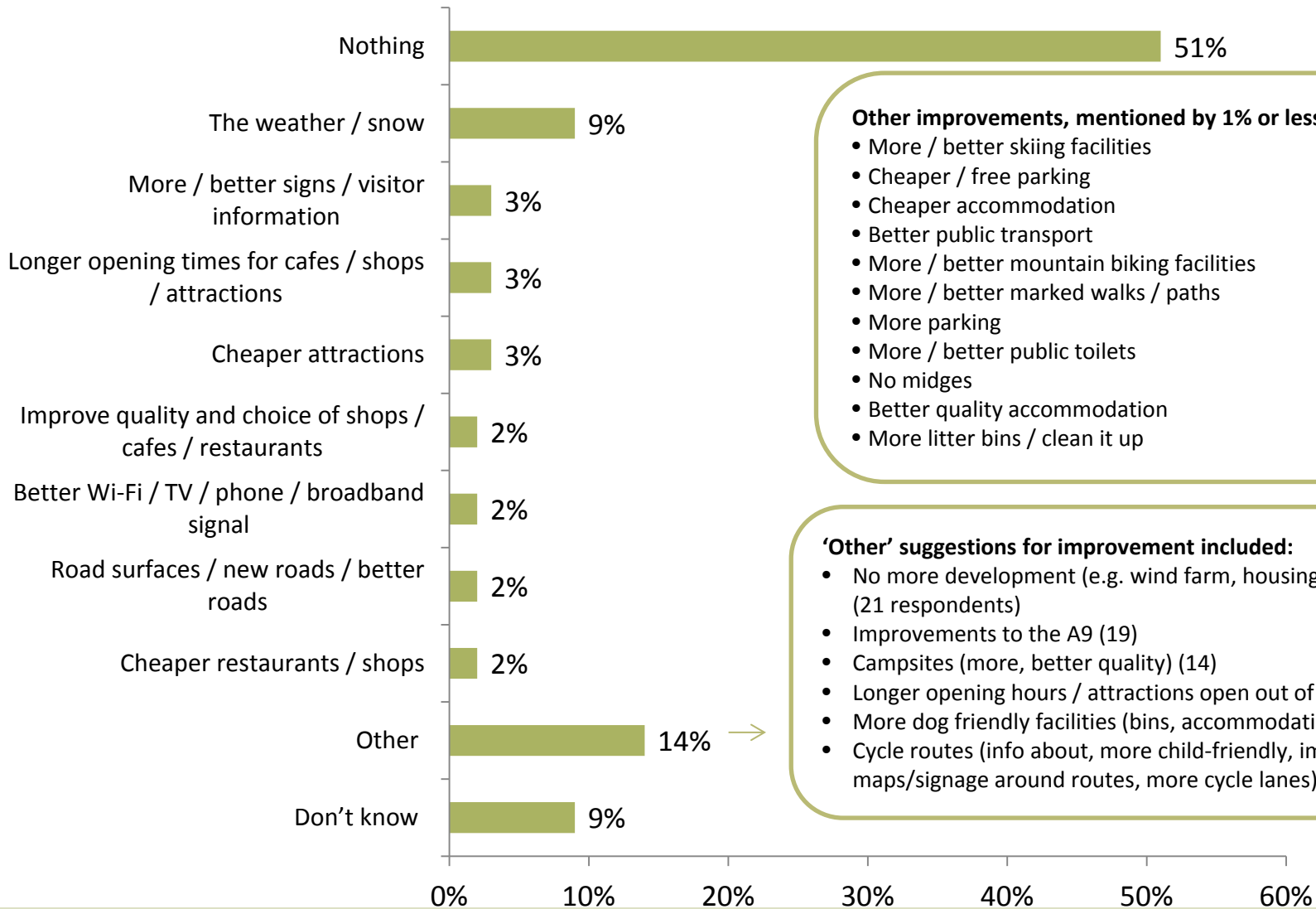
Aspects enjoyed most (2)



Aspects enjoyed most

- There were some differences between sub-groups in terms of their favourite aspects of the Cairngorms area:
 - Overseas visitors and those on a longer break were most likely to highlight most of the aspects listed.
- Area differences included:
 - Those visiting Moray were most positive about the peacefulness, open space and countryside, as well as culture and attractions.
 - Those visiting Atholl were most positive about scenery, wilderness and walking.
 - Unsurprisingly, Aviemore visitors were more likely than other areas to mention winter sports (24%).
 - Badenoch visitors were the most likely to mention enjoying cycling/mountain biking (14%).

Suggestions for improvement



- Other improvements, mentioned by 1% or less:**
- More / better skiing facilities
 - Cheaper / free parking
 - Cheaper accommodation
 - Better public transport
 - More / better mountain biking facilities
 - More / better marked walks / paths
 - More parking
 - More / better public toilets
 - No midges
 - Better quality accommodation
 - More litter bins / clean it up

- 'Other' suggestions for improvement included:**
- No more development (e.g. wind farm, housing) / keep it wild (21 respondents)
 - Improvements to the A9 (19)
 - Campsites (more, better quality) (14)
 - Longer opening hours / attractions open out of season (13)
 - More dog friendly facilities (bins, accommodation, pubs)(13)
 - Cycle routes (info about, more child-friendly, improved maps/signage around routes, more cycle lanes) (11)

Summary: perceptions of the National Park

- Perceptions of the National Park are very positive, with a majority agreeing with statements such as ‘I enjoyed my visit and would recommend to friends’ and ‘I love this place’ – and 97% of respondents agreed that the National Park seems well managed and cared for.
- Ratings of facilities and customer service were also generally high, and there has been a shift in ratings from ‘good’ to ‘very good’ since the 2009-10 survey.
- All visitor groups gave ratings of their overall visit of at least 8.6 out of 10 (the average score overall was 8.76). There has also been a statistically significant increase in the overall visit ratings since the previous survey.
- 75% of visitors said they were ‘very likely’ to visit again, and a further 18% said they were ‘likely’ to come back – and a greater proportion said they were very likely or likely to return in the current survey compared to 2009-10.
- The most enjoyed aspects of the visit were the beautiful scenery / views and the peaceful / relaxing nature of the area.
- Over half of respondents (51%) could not think of anything that would have improved their visit and very small percentages mentioned any individual improvements.

Expenditure in the Cairngorms area

Spend in the Cairngorms

(per person, in the last 24 hours)

	Total	Resident	Day tripper	Short break	Longer break
Accommodation	£60.50	-	-	£50.20	£96.10
Food and drink elsewhere	£11.30	£6.30	£6.40	£11.00	£13.80
Entertainment	£5.30	£0.80	£3.70	£5.50	£6.10
Tourist shopping	£5.60	£1.00	£3.30	£3.30	£8.20
Transport within the area	£3.00	£2.60	£1.50	£2.90	£3.80
Miscellaneous/other expenditure	£1.70	£3.20	£0.70	£1.80	£2.00
Total	£87.40	£13.90	£15.50	£74.70	£129.90

As expected, the highest spenders are those staying overnight, with accommodation costs to pay for. Spend on other items was relatively low and a potential area for development.

Conclusions

Conclusions

- The overall aim of the 2014-15 Cairngorms Visitor Survey was to understand visitors to the Cairngorms National Park in terms of their profile, visiting behaviour and visitor experience.
- A total sample of 2,553 face-to-face interviews was achieved, providing robust data from over the course of the year and sampling visitors from a wide range of locations across the Park.
- The following conclusions are presented under the three main themes of the survey:
 - visitor profile
 - visiting behaviour
 - visitor experience.

Conclusions: Visitor Profile

- The Cairngorms attracts a majority of visitors who are away from home on holiday in the Cairngorms area, although around a quarter are on a day trip or short outing from home. The 2014-15 sample included a much smaller proportion of residents (4%) than the previous survey.
- Over half of the area's visitors are from Scotland, with the remainder fairly evenly split between the rest of the UK and overseas. Compared to Scottish visitor statistics, the Cairngorms attracts a higher proportion of visitors from Scotland and a lower proportion from the rest of the UK.
- The visitor profile is skewed to higher socio-economic groups, but with a spread of age and gender.
- Following a similar pattern to the previous survey, the area attracts couples and families, with respondents most likely to be with their partner and/or other family members.
- The area is obviously attractive to a core group of loyal visitors, with a substantial minority having visited more than 20 times in the last five years. Around two-thirds overall were repeat visitors.
- For overnight visitors, longer trips of 5+ nights are common, although the average length of stay in the Cairngorms area itself is 4.2. Most stay in self-catering accommodation, in hotels, or camping.
- Reflecting the high levels of repeat visits, information about accommodation was likely to come from a previous visit, although the internet was also commonly mentioned (most often from Google, VisitScotland or Booking.com), as well as word of mouth information from friends or relatives. There has been a shift towards the internet as a source of accommodation information since the previous survey, highlighting the increasing importance of accommodation having a good online presence.

Conclusions: Visiting Behaviour

- The area's natural assets are clearly crucial in attracting visitors: the key drivers of visits to the Cairngorms area are the beautiful scenery and countryside, the peace and quiet / relaxation, having visited before, and the opportunity to go hill walking.
- Findings indicate that visitors utilise a range of information sources to help inform their visit. A combination of previous experience, word of mouth and the internet are key (VisitScotland and the Cairngorms website were the most often mentioned specific websites), along with Visitor Information Centres.
- During their visit, around half had picked up visitor information – this as an increase compared to the previous survey. The most commonly mentioned sources of information during the visit were VICs, visitor attractions and information from tourist businesses.
- There is obviously a diverse range of activities available for visitors to the Cairngorms. The most common activities undertaken were general sightseeing, walking (low level), visiting attractions and eating out. A substantial minority mentioned more active sports such as cycling, skiing and hill walking – and there was a clear seasonal pattern in responses about activities, as would be expected.
- Among those who visited attractions, the most frequently mentioned were Landmark Forest Adventure Park, Cairngorm Mountain (Funicular railway), Balmoral Castle, Highland Wildlife Park and Glenlivet Distillery.
- Data on visitor spending within the Cairngorms area indicates that, as expected, the highest spenders are those staying overnight with accommodation costs to pay for. Spend on other items was relatively low and a potential area for development.

Conclusions: Visitor Experience

- All survey data relating to the visitor experience reflect high levels of satisfaction and positive perceptions of the Cairngorms. For example, a majority agree with statements such as ‘I enjoyed my visit and would recommend to friends’ and ‘I love this place’ – and the vast majority of respondents (97%) agreed that the National Park seems well managed and cared for.
- The facilities in the area and customer service across a range of aspects were also given generally high ratings, and there has been a shift in ratings from ‘good’ to ‘very good’ since the 2009-10 survey, suggesting improvements over time in the tourist facilities and customer service provided to visitors.
- The average rating of the overall visit was also very high (8.76 out of 10), and there has been a statistically significant increase in this rating since the previous survey.
- When asked about their expectations prior to visiting and their experiences now they are in the area, visitors report that their expectations are being exceeded. These positive experiences are reflected in the high proportion of respondents who said they would visit again – and there has been an increase in the proportion saying they were very likely or likely to return in the current survey compared to 2009-10, again indicating positive progress since the last survey.
- The most enjoyed aspects of the visit were the beautiful scenery / views and the peaceful / relaxing nature of the area. Around half of all respondents could not think of anything that would have improved their visit and very small percentages mentioned any individual improvements. All of these findings paint a positive picture for the future of the National Park.

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