



Cairngorms National Park Partnership Plan 2017 – 2022

ISSUES REPORT



June 2016

VISITOR INFRASTRUCTURE AND INFORMATION ISSUES REPORT

I. POLICY CONTEXT

1.1 National Outcomes

The Scottish Government has identified 16 national outcomes which describe what they want to achieve over the next 10 years to 'make Scotland a better place to live and a more prosperous and successful country'. Tourism and visitor infrastructure plays an important role in supporting the following national outcomes:

- 'We realise our full economic potential with more and better employment opportunities for our people.
- We live in well-designed, sustainable places where we are able to access the amenities and services we need.
- We value and enjoy our built and natural environment and protect it and enhance it for future generations.'

1.2 Tourism Scotland 2020 (2012)

The Tourism Scotland 2020 (TS2020) National Strategy sets out the role of tourism in Scotland, how it can be strengthened and priorities for action. It is currently being reviewed and updated. The Strategy's growth ambition for Scotland involves a focus on turning its assets - including 'Nature, heritage and activities' - into visitor experiences. It acknowledges that tourism in rural destinations is the backbone of the local economy and that 'businesses and industry groups are... working together to grow the value of tourism in their areas by making more of assets such as walking and cycling, adventure tourism, food and drink, and local history and culture'.

The Cairngorms National Park Authority (CNPA) is actively engaged in supporting these aims through collaborative working with partner organisations to improve visitor infrastructure and experiences within the National Park.

1.3 National Park Partnership Plan (2012)

The National Park Partnership Plan (NPPP) provides the strategic direction for what happens in the National Park. It has 3 long-term outcomes, one of which is 'People enjoying the Park through outstanding visitor and learning experiences'. Supporting sustainable tourism and developing the National Park's visitor infrastructure is key to this outcome.

2. OTHER DRIVERS OF CHANGE

There are a number of Strategies prepared by the Cairngorms National Park Authority (CNPA) that seek to deliver the objectives set out in national policies and strategies as well as the NPPP.

2.1 Active Cairngorms 2015

The Active Cairngorms programme aims to promote and utilise the health benefits of outdoor activity for residents and visitors to the National Park by making it easier and safer

for people to move around the Park whatever their age, ability or background; to be more physically active, to learn about, care for and appreciate the National Park.

The Strategy also directs the development, management and promotion of non-motorised outdoor access in the Cairngorms National Park and contains an 'Action Plan' for the delivery of its objectives (set out below). It is divided into 3 themes:

- **Active Places:** Designing places that encourage physical activity
- **Active Management:** Champion recreational management best practice and environmental appreciation
- **Active promotion:** Promoting healthy lifestyles using Park facilities

This programme supports the delivery of visitor infrastructure and promotes the experience of nature, heritage and outdoor activities.

2.2 Tourism Action Plan (2014)

The Tourism Action Plan (2014) sets out how the Cairngorms National park can contribute to the delivery of the TS2020 at the regional level, influenced and informed by the NPPP, Sustainable Tourism Strategy and the CNP Economic Strategy.

It sets out the contribution of tourism to the National Park's economy as well as identifying opportunities for growth. It draws on the TS2020 themes: *Turning Assets into Experiences*, *Improving the Customer Journey* and *Building our Capabilities*. The Action Plan sets out how each of these themes will be delivered in the National Park in collaboration with different partners.

2.3 Cairngorm & Glenmore Strategy (in development)

Cairngorm and Glenmore is the most popular countryside visitor destination in the National Park with over 1 million visits per year. It is also highly designated and an important place for nature. Owned on behalf of the people of Scotland, the Cairngorm Estate is managed by Highlands and Islands Enterprise and the National Forest Estate. In 2014, these public bodies, along with the Cairngorms National Park Authority, Scottish Natural Heritage and Highland Council, formed the Cairngorm & Glenmore partnership.

The purpose of the Partnership is to collaborate in the strategic management of these land holdings in order to deliver:

- An exceptionally high quality natural environment
- A world-class visitor experience
- An economic asset contributing to the economy of the National Park and Scotland
- Engaged business and community stakeholders
- Efficient and effective public service delivery

The Partnership is currently developing a long term strategy for these two land holdings and public consultation began in December 2015. The consultation will seek to hear people's views and aspirations for this area, what should change, what should stay the same, and how

the Partnership should make the most of Cairngorm and Glenmore for neighbouring communities, visitors, the National Park and Scotland as a whole.

This project is strategically significant for tourism within the National Park as well as Scotland. Continuing to work with the Partnership to improve and enhance the visitor experience of this area is key.

2.4 Scottish Scenic Routes Initiative

The Scottish Scenic Routes Initiative was launched in 2013 and involves installing innovative and interactive sculptures along scenic tourist routes to promote and develop Scotland's 'international appeal and reputation'. The initiative aims to:

- **enhance the visitor experience of Scotland's landscape:** by creating innovatively designed viewpoints in selected locations in areas of outstanding scenery;
- **enhance and sustain rural economies and rural employment:** by integrating visitor strategies with infrastructure programmes that will help support tourism;
- **attract private sector investment in the tourism industry:** and
- **harness our design talent:** by providing a means whereby we can connect our design talent to enterprising opportunities – in particular, to support newly graduated or recently qualified architects.

Scottish Scenic Routes Initiative

As part of this initiative, a Route is being developed between Blairgowrie and Grantown-on-Spey along the A93 and A939 via Glenshee, Braemar and Tomintoul. The first sculptures - 4 viewing pods at Corgarff - have now been installed and two further installations at Tomintoul and Glenshee now have planning permission. This will develop a new visitor experience based on the landscape qualities of the National Park.

This principle of making key routes a celebration of the Scottish Landscape is also being adopted as part of the A9 dualling process.

2.5 Cairngorms Economic Strategy

The Cairngorms Economic Strategy (CES, 2015) has identified priorities that are specifically relevant to the Cairngorms National Park to ensure that partners are working together to address them. The Aim of the CES is taken from Policy Priorities within the Park Partnership Plan to '*Grow the economy of the Park by strengthening existing business sectors, supporting business start-ups and diversification, and increasing the number of workers employed in the Park*'.

The Cairngorms Economic Strategy (2013) highlights that:

- 1.5 million (1.6m 2014) people visit the National Park each year
- 43% of people in the National Park are employed in tourism related businesses
- 30% of the economy (GVA) is generated by tourism

The Economic Strategy sets out priorities that are specific to the National Park to ensure that partners are working together to achieve them. However, on account of the high quality and sensitive environment of the National Park, there is an inherent tension between the desire to increase visitor numbers and the need to sustain and enhance the natural environment and rare and endangered species.

3. TRENDS

There has been an overall increase in the number of visitors to the Cairngorms National Park (Figure 1) since 2009 with 1.64 million visitors in 2014. Between 2012 and 2014, visitor numbers have increased by 8.6% and visitor days by 9.6% (STEAM, 2015).

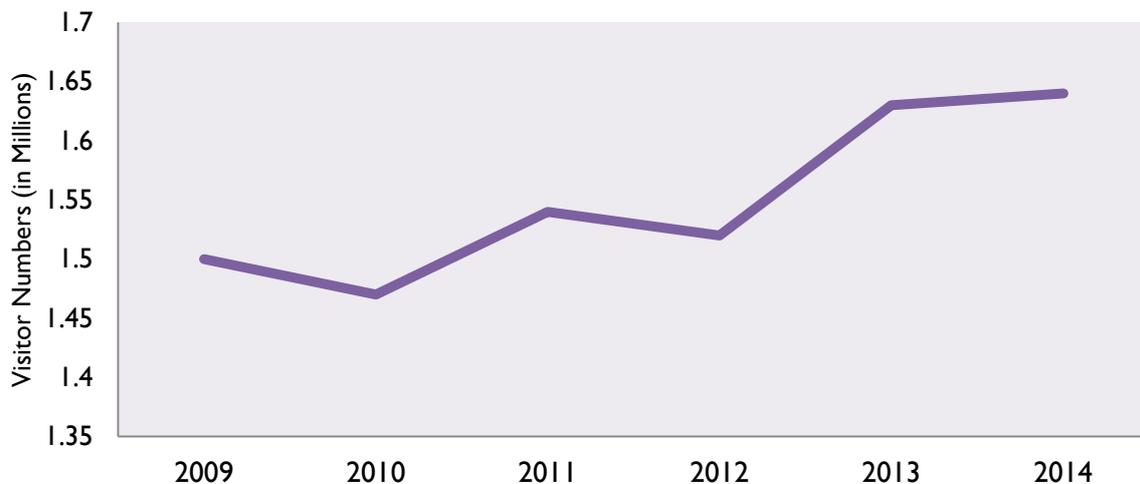


Figure 1 Visitors to the Cairngorms National Park (Source: STEAM report 2014)

Whilst the overall numbers have increased, there is still a strong seasonal trend in tourism, with the highest numbers of visitors in the summer months (Figure 2). A continuing challenge for the National Park is creating a more year round tourism economy, and the 2014 data shows some slight improvement in that area with a greater increase in visitors at off-peak times.

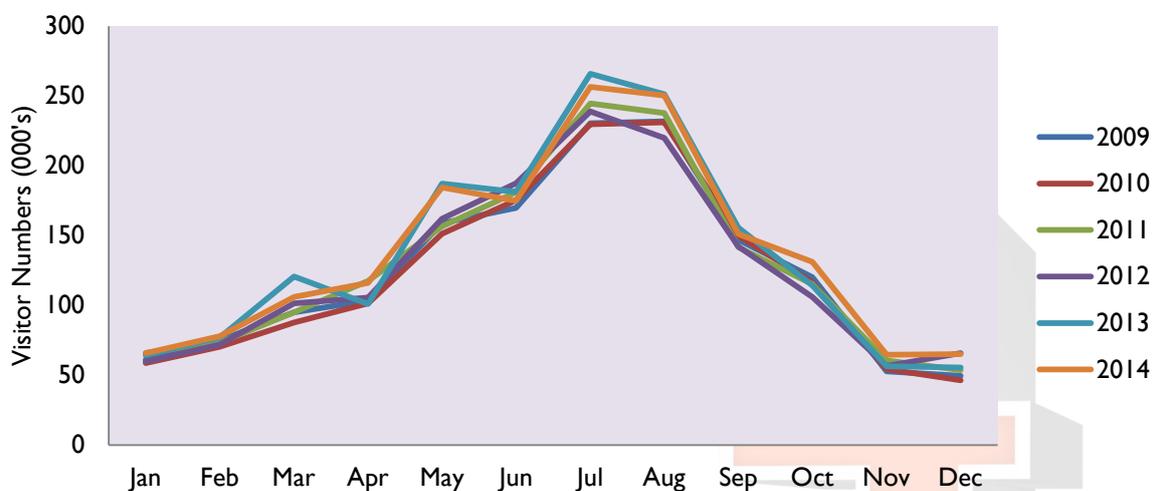


Figure 2 Visitors to the Cairngorms National Park by month (Source: STEAM report 2014).

Providing up to date and consistent information for visitors is an important part of a visitor's experience. There has been significant investment in quality visitor infrastructure to improve facilities including information and interpretation about the National Park and the special qualities. These include:

- 6 Visit Scotland Visitor Information Centres (VIC) and partnership VICs upgraded and refurbished
- New interpretation at all National Nature Reserves including:-
 - New ranger base at Glen Doll – Corrie Fee
 - New hide at Insh Marshes
 - Major upgrades in visitor centres at Nethy Bridge (Dell Wood), Glen Tanar, Muir of Dinnet, Glenmore
- Interpretation and information interventions in 13 communities ranging from community notice boards with CNP interpretation and information to more major projects:-
 - Station Square Sculpture, Boat of Garten
 - Community Visitor Centres in Blair Atholl and Lair, Glenshee
 - Braemar Castle
- Two mountain bike centres with new hubs at Glenlivet and Laggan
- All ranger bases upgraded
- 6 visitor attractions with CNP information and interpretation and indications that others are interested in developing interpretation linked to CNP.

Note: some positive 'double accounting' in these figures because Glen Doll ranger base is both an upgraded ranger base and interpretation for NNR

CNP Visitor Survey (2014/15) shows that half of visitors still collect information from facilities and attractions (27% from Visitor Information Centres, 15% from attractions & 14% from tourism businesses). So whilst there has been considerable progress, there is an ongoing need to maintain and expand information and interpretation about the National Park. The potential upgrading and improvement of a number of large visitor attractions within the National Park will also provide new opportunities to engage visitors with the outstanding nature and culture of the area.



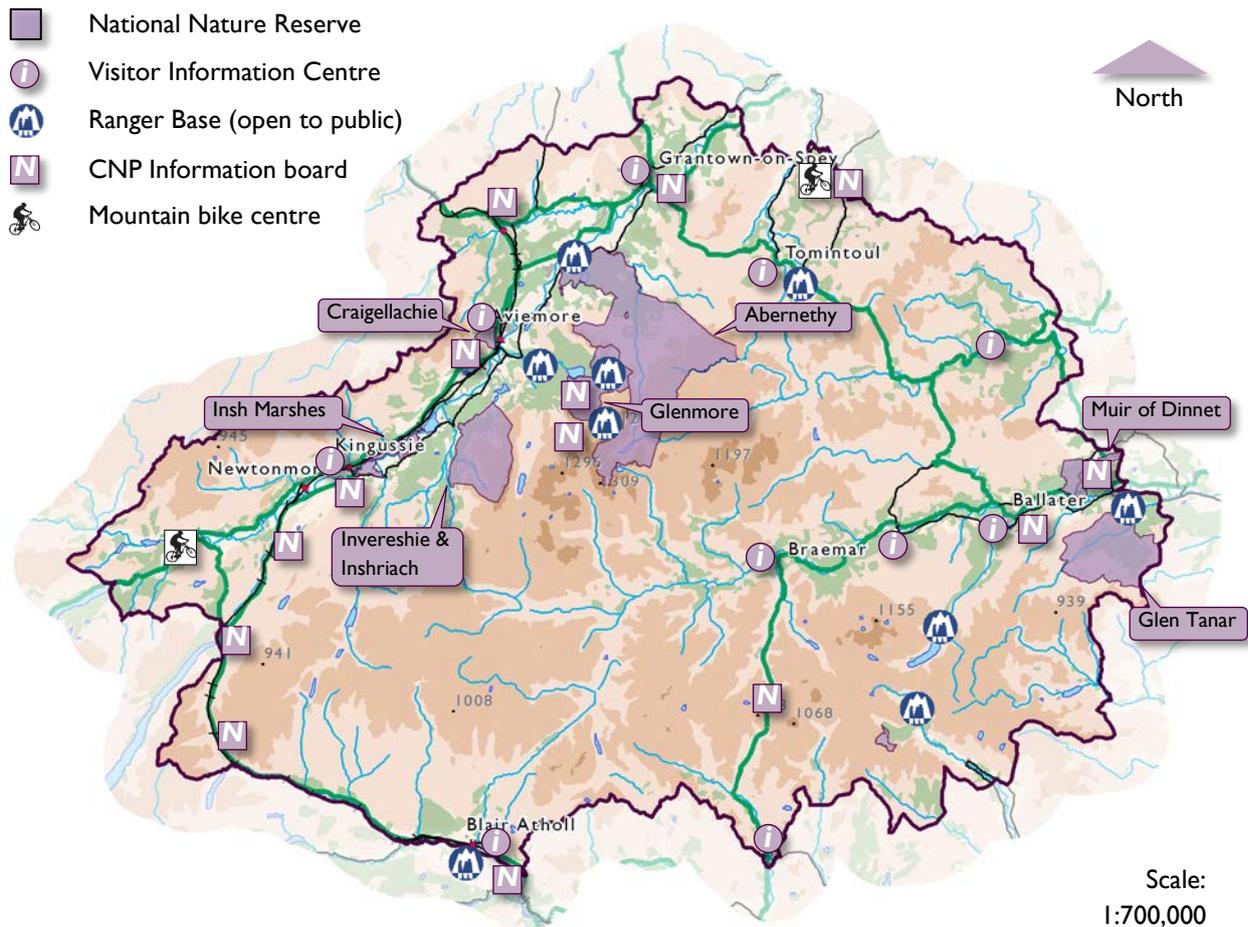


Figure 3 Visitor Infrastructure

Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2016. All rights reserved. Ordnance Survey Licence number 100040965 Cairngorms National Park Authority.

Partners appear to recognise the need for continued investment in visitor infrastructure and include:

- **Glenmore and Cairngorm – Forestry Commission Scotland, Natural Retreats, SYHA, Highlife Highland:** Major investment by Natural Retreats in visitor infrastructure at Cairn Gorm Mountain and development of a strategy by public sector partners to improve the visitor experience while maintaining the natural and cultural heritage of the area
- **Royal Zoological Society - Highland Wildlife Park:** Development of proposals to build a new visitor hub and improve the information and interpretation
- **Highlife Highland – Highland Folk Park:** Development of proposals to build a new visitor centre and cafe
- **Braemar Highland Games Centre:** Development of proposals to build a new visitor centre. Range of Communities incl. Glenlivet and Tomintoul, Braemar, Laggan, Glenshee (Spittal)
- **Speyside Way and Deeside Way:** Detailed proposals and costs being developed to construct the Speyside Way from Kincaig to Newtonmore. Outline proposals to construct the Deeside Way from Ballater to Braemar.

Some 38% of our visitors list going to attractions as one of their main activities while in the National Park – the third most popular activity. A number of key visitor attractions have plans to expand and enhance their offering and some new attractions are planned. These developments are likely to create new opportunities for public/private partnerships to engage visitors with the outstanding nature and culture of the area. At a time of greater financial constraints, effective public private partnerships will be central to delivering and enhancing the tourism offer within the Cairngorms National Park.

3.1 Cairngorms Visitors Survey

The recently published Cairngorms Visitor Survey 2014/15 gathers a range of information about how visitors interact with the National Park. The survey has been repeated every five years since 2003/04 using the same methodology of 2,500 face to face interviews over a 12 month period in a range of locations across the National Park.

To date there has been the establishment of a strong brand identity for the National Park, well recognised by visitors along with a strong awareness by visitors of being in a National Park (Figure 4).

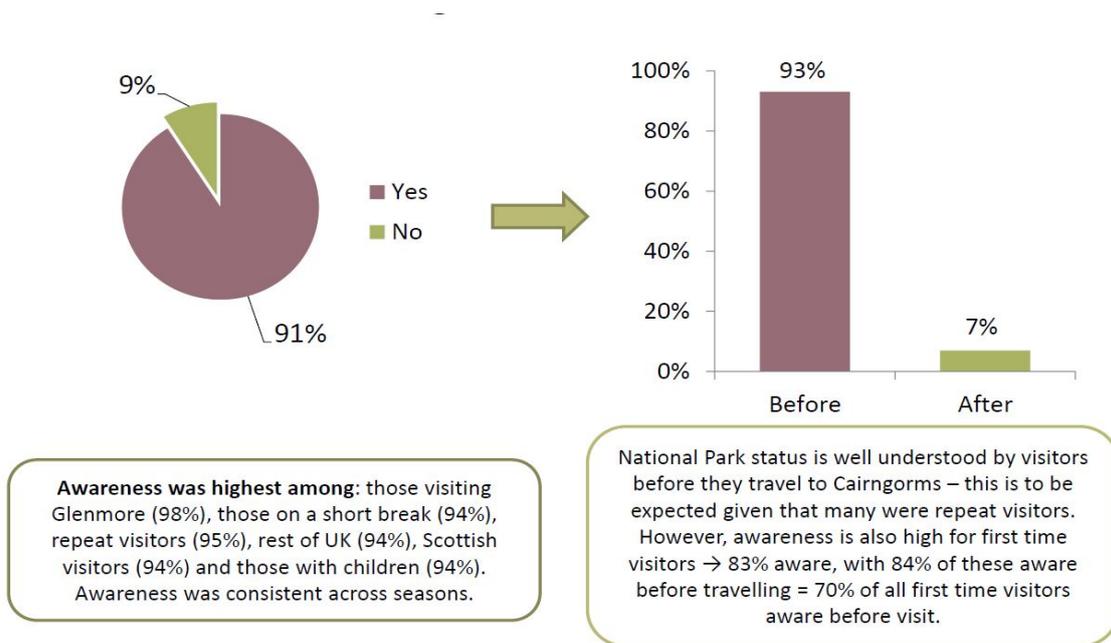


Figure 4 Awareness of being a national park (Source: Cairngorms Visitor Survey 2014/15).

The survey has also shown that overall visitor satisfaction has increased from 8.25 out of 10 (2004) to 8.76 out of 10 in 2015. The Highest level of overall satisfaction was in Aberdeenshire and Angus with 8.89 out of 10 (Figure 5). However, whilst visitor satisfaction is high, expectations and competition continues to rise.

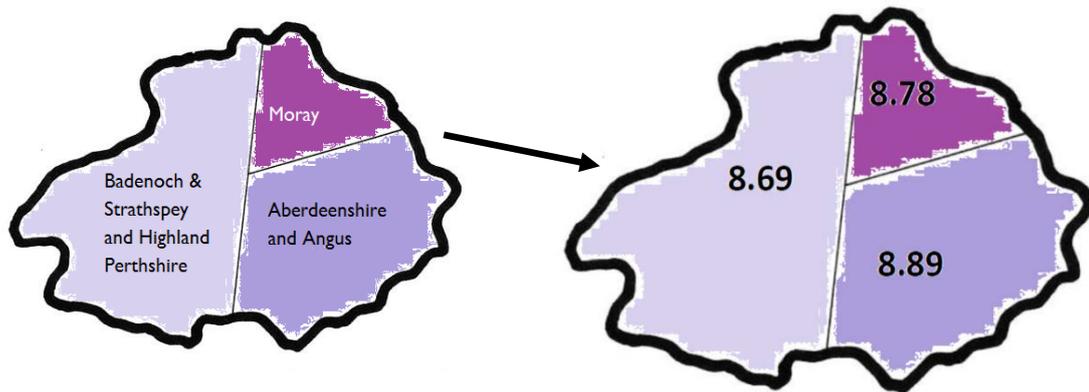


Figure 5 Visitor satisfaction across National Park areas (Source: Cairngorms Visitor Survey 2014/15).

The importance of the National Park’s status as an attraction for those deciding to visit the area is also high (Figure 6), particularly for overseas visitors. This also varies considerably between the National Park areas where status is of greater importance to those visiting the Moray area (Figure 7).

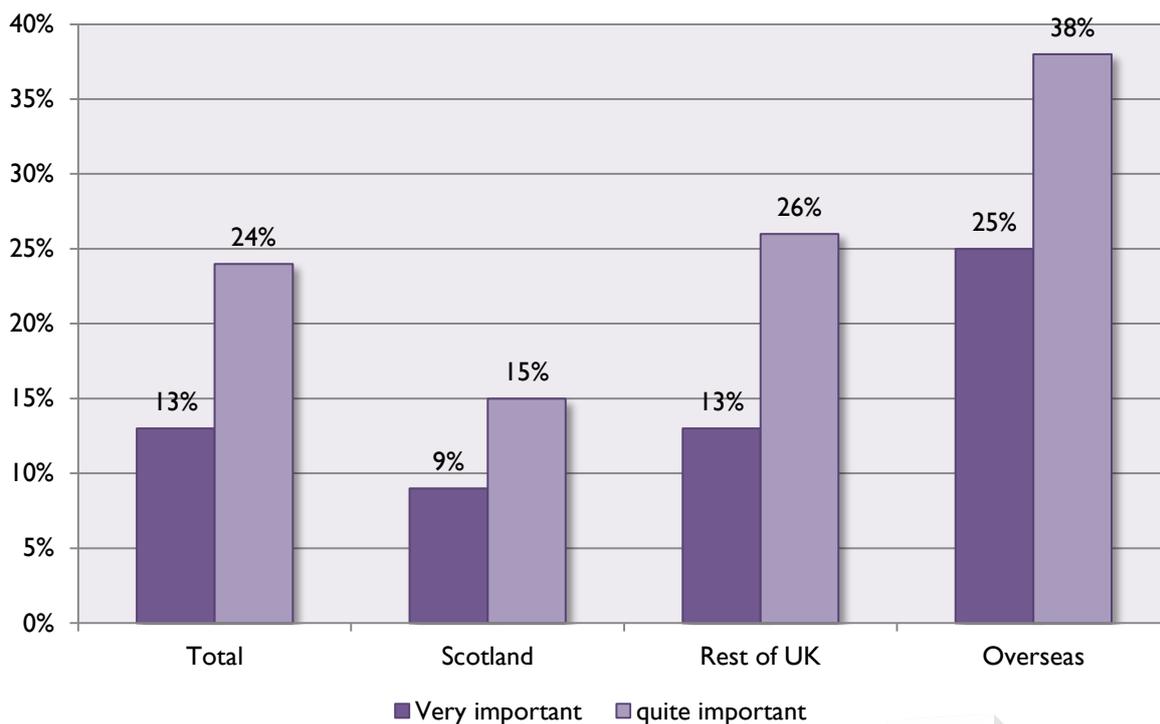
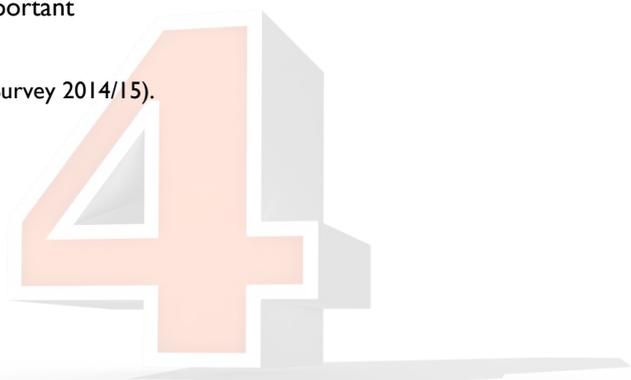


Figure 6 Importance of National Park status (Source: Cairngorms Visitor Survey 2014/15).



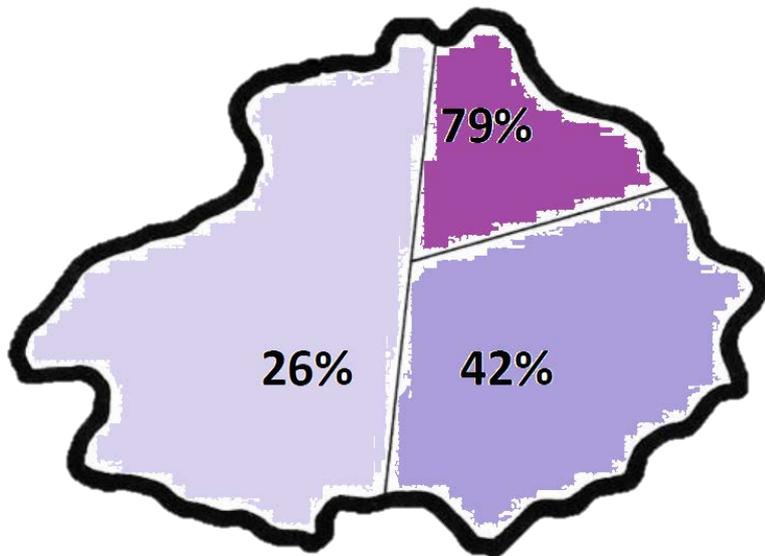


Figure 7 Importance of being a National Park by area (Source: Cairngorms Visitor Survey 2014/15).

Overseas visitors make an important contribution to tourism in the National Park. However there are significant differences in the areas they visit, with Moray having the greatest proportion of visitors (Figure 8). It is likely that the Whisky and Heritage offering in the eastern Cairngorms draw overseas visitors.

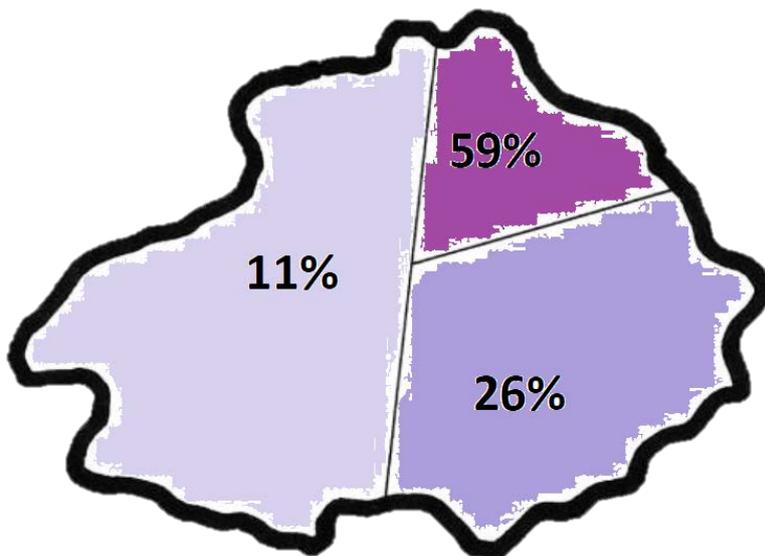


Figure 8 Overseas Visitors (Source: Cairngorms Visitor Survey 2014/15).



3.2 Visitor Facilities

The Visitor survey (2014/15) has shown an increase in visitors staying in self-catering (up from 24% in 2009/10 survey) and camping (up from 15% in 2009/10) accommodation. There has also been a reduction in hotel accommodation (down from 32% in 2009/10). In addition, there is anecdotal evidence of an increase in high end accommodation - both self-catering and hotels such as the Fife Arms in Braemar.

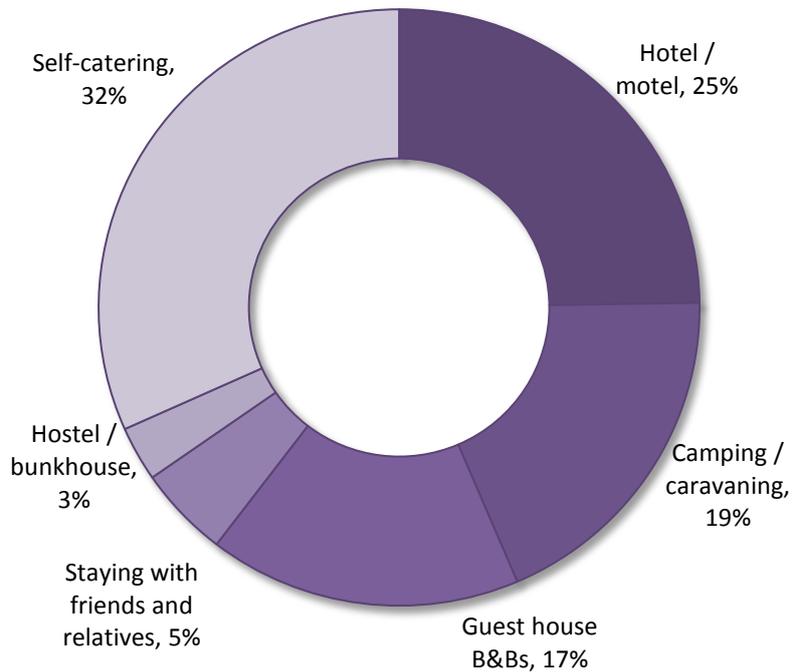


Figure 9 Importance of National Park status (Source: Cairngorms Visitor Survey 2014/15)

The Visitor Survey also sought perspectives on

visitor facilities within the National Park (Figure 10). The majority of services were scored as good with the only area showing some dissatisfaction was in respect of mobile phone reception and wifi access. Work is currently ongoing to deliver superfast broadband in many parts of the National Park and further detail about this project can be found in the Economic Development paper.



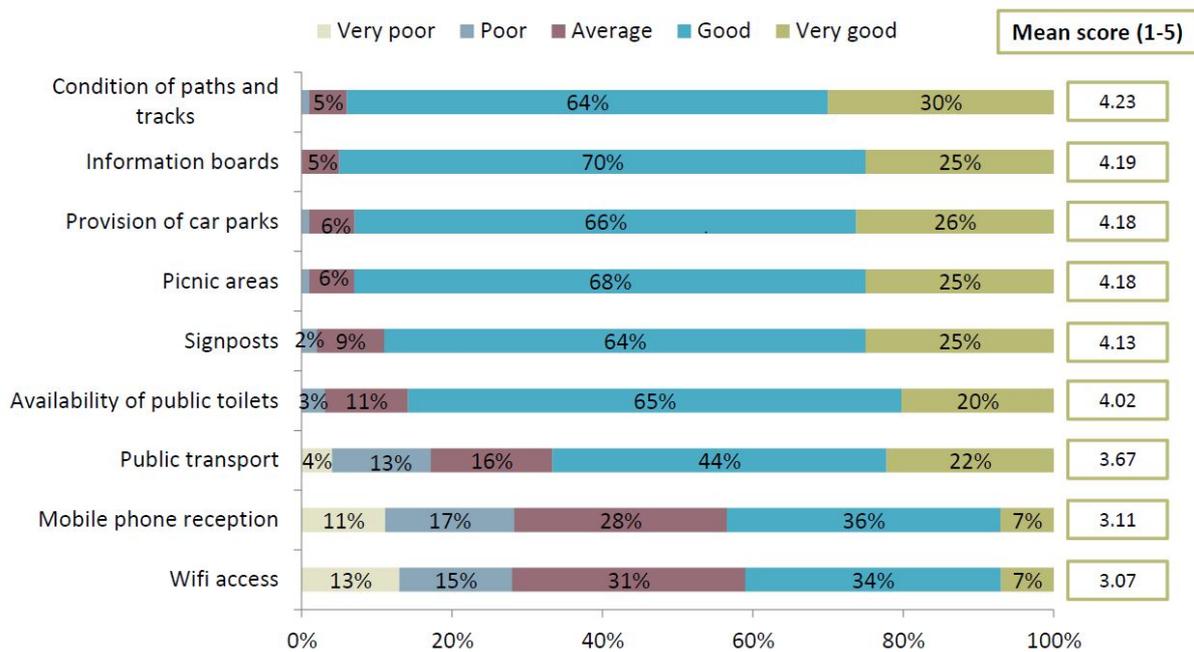


Figure 10 Rating of facilities (Source: Cairngorms Visitor Survey 2014/15).

Since designation in 2003 a large amount of work has been undertaken to develop the Cairngorms National Park as visitor destination. The creation of a brand image for the area and its widespread use on threshold signs, print and web, visitor centres and attractions has helped to promote the area. The use of the brand image alongside maps, text and images of the area has led to high recognition of the Cairngorms National Park.

The parallel investment in visitor centres, community information, visitor attractions, ranger bases, National Nature Reserves and path infrastructure has resulted in very positive feedback from visitors.

The 2015 Visitor Survey clearly demonstrates that visitors know they are coming to a National Park and their expectations are being met across a wide range of indicators. Nevertheless, we are still aware of many opportunities where the experience could be improved and many opportunities where partners could better link their activity to the National Park.

3.3 Infrastructure

Partners have delivered significant investment in the visitor infrastructure including extending the Speyside Way and constructing the Old Logging Way, now used by 70,000 people each year, upgrading visitor centres, ranger bases and information points. We have begun work to collaborate on long term enhancement of publicly owned land at the heart of the Park at Cairngorm and Glenmore, and work is continuing through multi-million pound restoration projects on some badly eroded mountain paths.

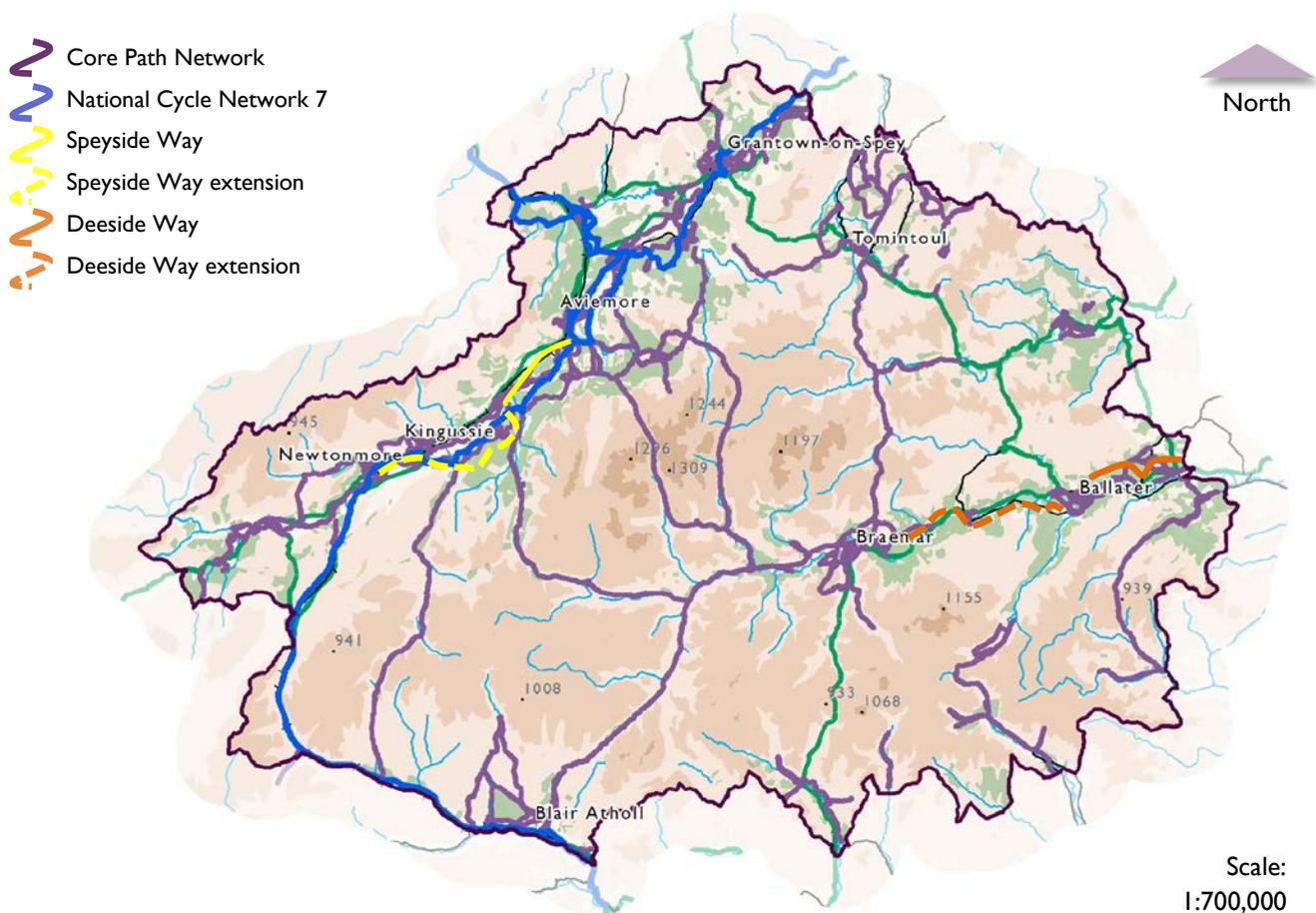


Figure 11 Strategic Path network.

Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2016. All rights reserved. Ordnance Survey Licence number 100040965 Cairngorms National Park Authority.

The Map shows the current network of core paths in the National Park as well as the Deeside and Speyside ways which are strategically important walking and cycling routes. The Speyside way has recently been extended to Kinraig (shown on map), with the aim of extending it to Newtonmore by 2017/18. In addition, the Deeside way currently reaches Ballater (from Aberdeen) and work is ongoing to extend it through to Braemar. Both these routes add to existing long distance paths improving and expanding the visitor offering. However, as both follow river valleys and are relatively flat if they are constructed to allow walking and cycling they will also encourage functional use between communities and to visitor attractions.

A9 dualling

The dualling of the A9 is likely to have a range of impacts and create new opportunities. During construction it is important that opportunities to visit the area are not restricted and that visitors feel that are able to travel easily both to and within the National Park. Once completed a fully dualled A9 is likely to open up new day and short stay markets that see the Cairngorms as being within reasonable driving distance. Design and construction of

the road will allow for the creation of a route, with suitably located lay-bys and viewpoints, enabling drivers to enjoy and experience the full grandeur of Cairngorm landscapes. Digital connectivity along the route will create exciting opportunities for up to date visitor information. Commitment to developing a non-motorised user route along the length of the upgraded road will create new opportunities for travelling through the Cairngorms linking walkers and cyclists to communities and attractions along the route.

4. WHAT WE WANT TO ACHIEVE

- Enhancing the quality of visitor infrastructure to match the quality of environment;
- Investing in maintaining and upgrading key off-road routes including the Speyside Way, Deeside Way and the Core Paths network;
- Delivering a consistent high quality of visitor welcome through new and improved information and ranger services as well as partnership working to support businesses and visitor attractions;
- Improving the visitor experience in Cairngorm and Glenmore;
- Completing the 'Snow Roads Scenic Route' and developing a similar experience along the A9; and
- Maintaining the CNPA website as the most popular and effective source of information for visitors with links to other key sites.

5. MECHANISMS

- Tourism Action Plan linked to Tourism Scotland 2020 – sets out how the themes of TS2020 will be delivered in the National Park in collaboration with different partners
- Scottish Scenic Routes Initiative – the development of innovative and interactive sculptures along scenic tourist routes will create a new visitor experience based on the landscape qualities of the National Park
- Cairngorm & Glenmore Strategy – a partnership approach to improving and enhancing this key visitor destination within the National Park
- Tomintoul and Glenlivet Landscape Partnership - £3.6m Heritage Lottery Bid (second stage submitted) that incorporates a range of activity in the Tomintoul and Glenlivet area to improve the visitor experience, including significant enhancements to information and interpretation, upgrades to heritage attractions, and path improvements.
- The Mountains and The People Project - £5m approved Heritage Lottery Project lead by Cairngorms Outdoor Access Trust to upgrade key mountain paths in both National Parks and celebrate their use.
- Active Cairngorms - the approved Outdoor Access Strategy for the National Park that sets out priorities for improving access infrastructure and promoting responsible access with a particular emphasis on encouraging less active and inactive people to walk and cycle.

- Ranger Services - managed by a range of public, private and charitable partners across the National Park, rangers are key visitor facing staff promoting the enjoyment, understanding and care of the National Park.

6. KEY QUESTIONS

- Have the right visitor infrastructure investment priorities been identified, or are there others that should be included?
- How can the consistency and quality of visitor welcome be improved?

7. RELEVANT DATA RESEARCH AND REPORTS

Visitor and tourism related data is gathered and monitored through:

- **CNP Visitor Survey's 2004, 2010, 2015**
A five yearly face to face survey that provides detailed information on visitors and their expectations and experiences (Available at www.cairngorms.co.uk)
- **STEAM Visitor Value and Volume 2004-2014**
An economic model that uses visitor data to provide information on visitor numbers and their value to the economy
- **Scotland's People and Nature Survey 2013/14**
A national telephone survey that provides detailed information on visitors to Scotland's countryside and their expectations and experiences
- **CBP Business Barometer**
A quarterly survey of businesses in the CNP that provides information on how businesses perceive the economy and their visitors

8. REFERENCES AND FURTHER INFORMATION

- **Active Cairngorms (2015) Cairngorms National Park Authority**
www.cairngorms.co.uk
- **Cairngorm & Glenmore Strategy** www.cairngorms.co.uk/consultation/cairngorm-glenmore-future-direction/
- **Cairngorms Economic Strategy (2015) Cairngorms National Park Authority**
<http:// Cairngorms.co.uk/caring-future/local-economy/>
- **Cairngorms Visitors Survey 2014/15**
<http:// Cairngorms.co.uk/caring-future/local-economy/tourism/>
- **National Outcomes, Scottish Government** <http://www.gov.scot/About/Performance/scotPerforms/outcome>
- **National Park Partnership Plan (2012) Cairngorms National Park Authority**
www.cairngorms.co.uk

- TNS. 2014. **Scotland's People and Nature Survey 2013/14**. *Scottish Natural Heritage Commissioned Report No. 679*.
<http://www.snh.gov.uk/docs/A1471713.pdf>
- **Scottish Scenic Routes Initiative, more information can be found at**
www.creatingplacescotland.org/2014-01-24/scottish-scenic-routes-initiative
- **STEAM Visitor Value and Volume 2004-2012**
- The **Cairngorms Business Partnership Business Barometer** is published quarterly at www.cairngorms.co.uk.
- **Tourism Action Plan (2014) Cairngorms National Park Authority** <http:// Cairngorms.co.uk/caring-future/local-economy/tourism/>
- **Tourism Scotland 2020 (2012) Scottish Tourism Alliance** <http://scottishtourismalliance.co.uk/wp-content/uploads/2013/03/Scottish-Tourism-Strategy-TourismScotland2020.pdf>

