Cairngorms National Park Authority
Visitor Survey 2019-20

Interim Report: Summer Season 2019

November 2019

Contents

Project 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).

The National Park Authority co-ordinates the delivery of four statutory aims: to conserve and enhance the area's natural and cultural heritage; to promote the sustainable use of the area's natural resources; to promote understanding and enjoyment of the Park's special qualities; and 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 the National Park – in 2003/04, 2009/10 and 2014/15. This research was commissioned to continue to inform the sustainable management of the parks through the 2019/20 Visitor Survey. This report provides data and analysis pertaining to the summer season 2019.

Research objectives

The overall aim of the research was to conduct research to understand visitors to the Cairngorms National Park in terms of their profile, visiting behaviour and visitor experience. Specific research objectives were to:

1: Supply information about visitors and their type of visit, to guide future tourism policy and activity

2: Gather data which can be updated in future studies to enable changes to be tracked over time

3: Analyse and compare with previous Visitor Surveys and between the two National Parks

4: Better understand visitors' experience and motivations segmented by demographic and protected characteristics

Method & sample

Research method:

Face-to-face, on-street interviews conducted by CAPI

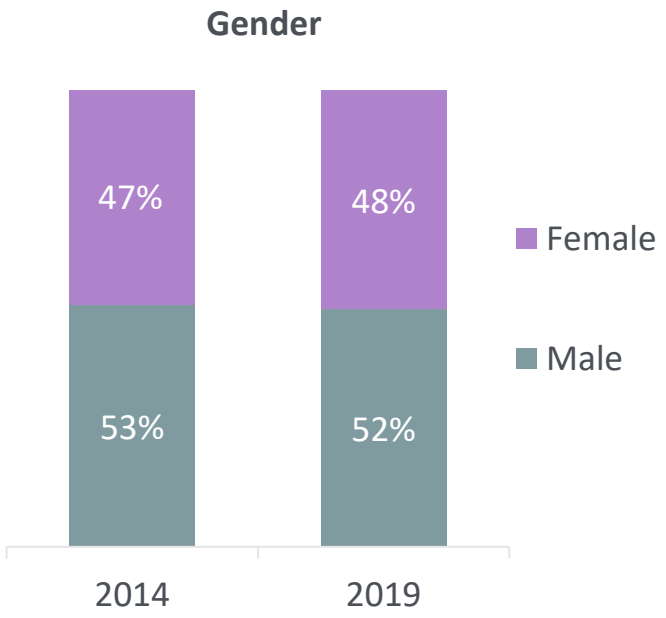
Quantitative research
Year long visitor survey to be conducted from May 2019 – April 2020. Target sample size 2,500
Sample size targets set each month to ensure spread across the year, across 40 sample points spread across the Park
Random sampling (no quotas set) – to ensure accurate visitor profiling
Sample size for interim report (summer season): 1,679
Margins of error (calculated at the 95% confidence level): between ±0.48% and ±2.39%
Fieldwork conducted May – September 2019

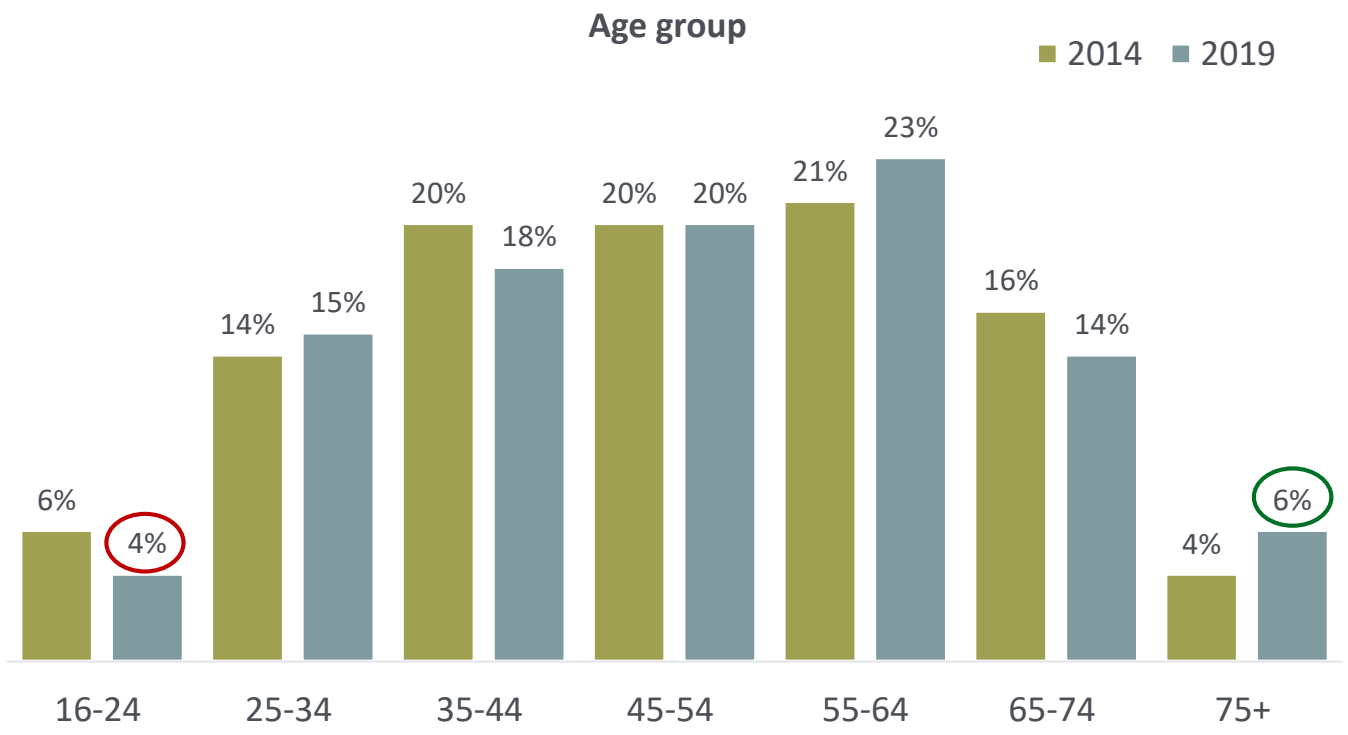
Analysis and reporting
Only statistically significant differences are reported – indicated with red and green circles
Where base sizes are low a caution sign is shown. These results must be read with caution
Where figures do not add to 100% this is due to multi-coded responses or rounding
Time series data is included where possible and relates to the summer season report from the previous survey (May – September 2014).

All work has been carried out in accordance with ISO 20252 guidelines and the MRS Code of Conduct

Visitor profile

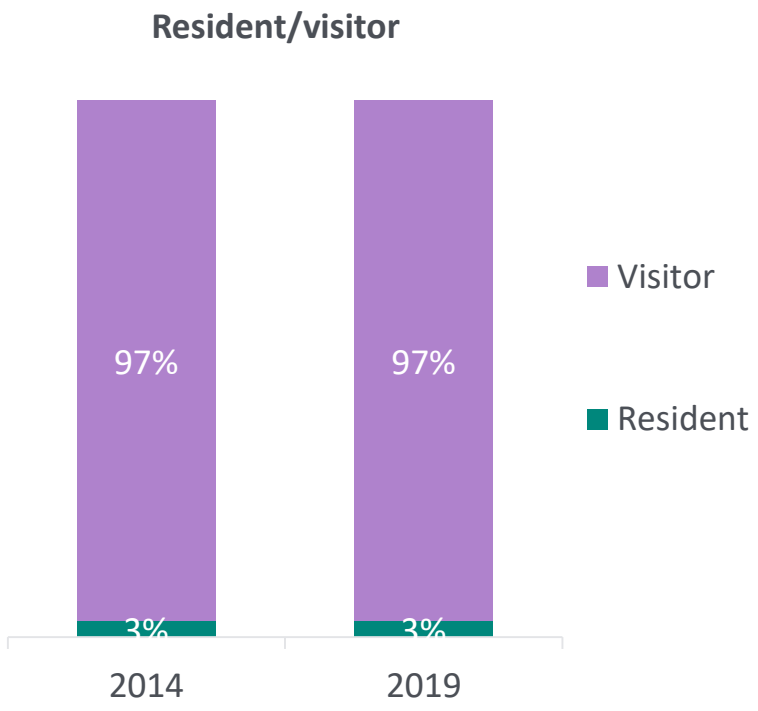
Even split of gender, and a spread of age groups. Very consistent with the previous summer season report, though more 75+ and fewer 16-24s this year

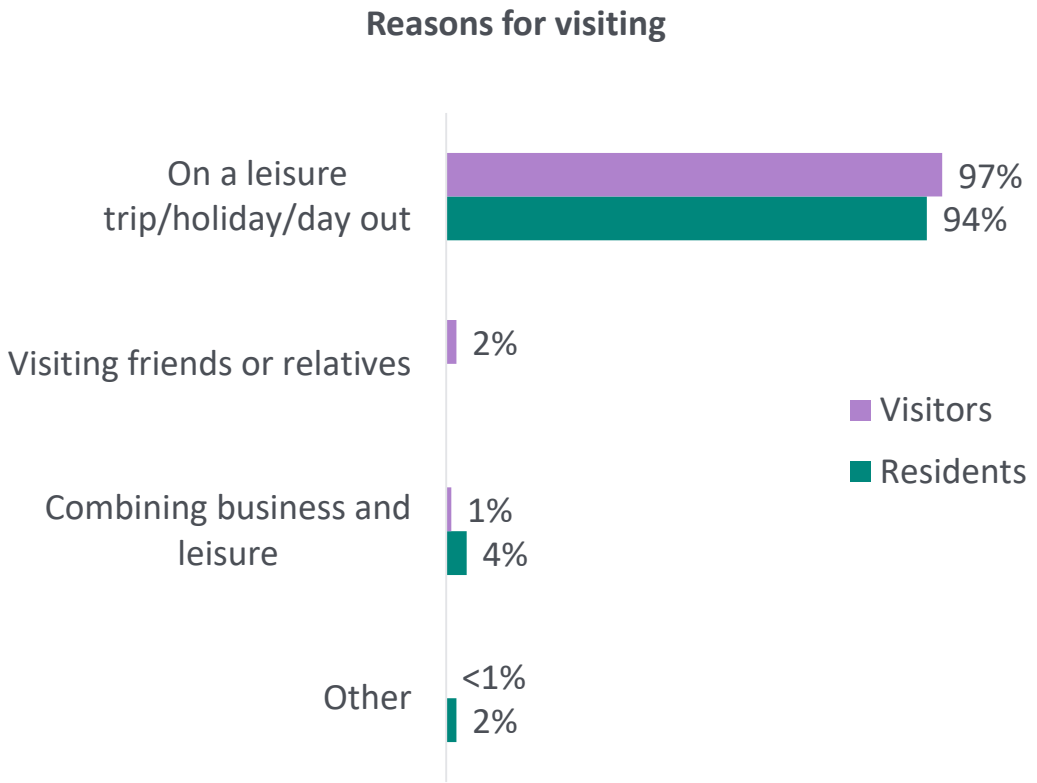




Base (all): 2014 1,519, 2019 1,679

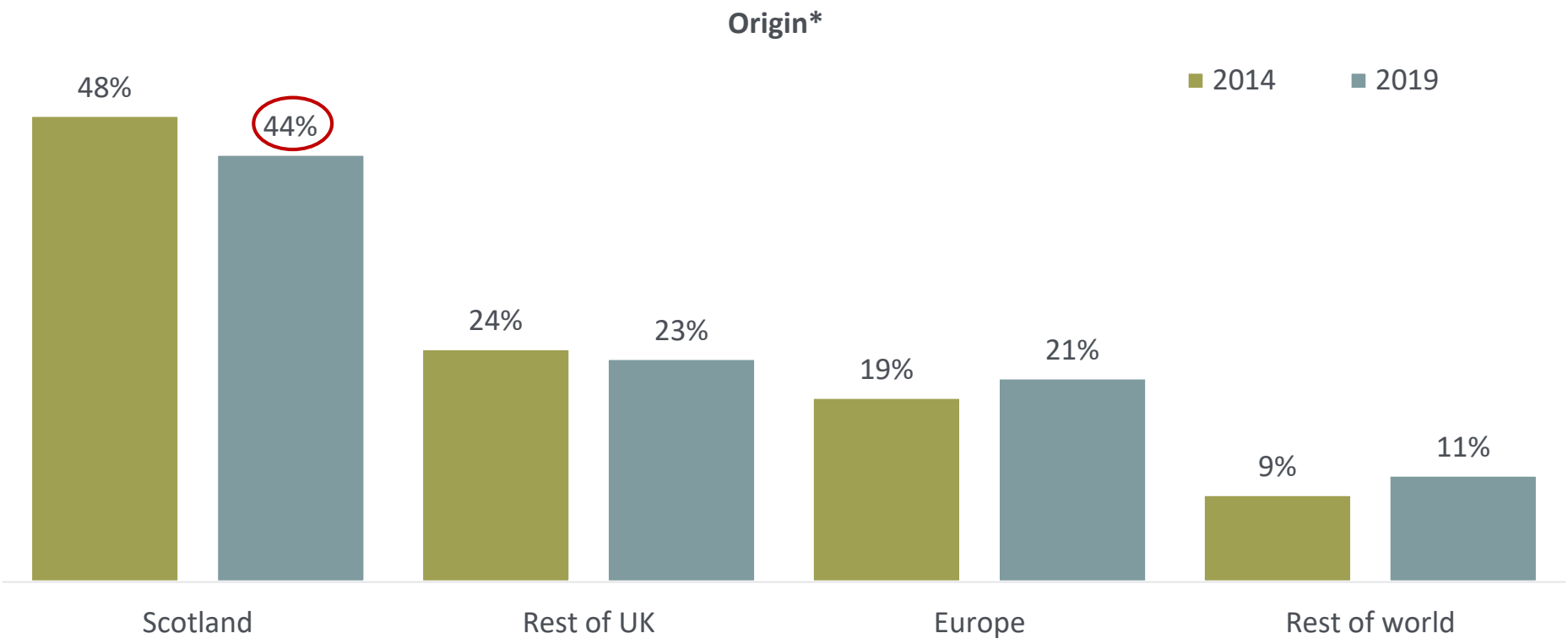
As in 2014, the vast majority were visitors (just 3% were residents) – and most were on a leisure trip, holiday or day out





Base (all): 2014 1,519, 2019 1,679

Visitors tended to be from Scotland (though slight drop in % since 2014); 1/4 were from rest of UK and 1/5 from Europe



Base (all visitors): 2014 1,467, 2019 1,629

* Detailed origin information is included in an Appendix to this report

Respondents tended to be white, in work, higher SEG and not affected by disability – as was the case in 2014

progressive

Ethnicity	2014	2019
White	95%	97%
Mixed/multiple b'ground	<1%	1%
Asian, Asian Scottish, or Asian British	1%	1%
Black, Black Scottish or Black British	<1%	<1%
Other Ethnic Background	1%	<1%
Prefer not to say	4%	1%
Base	**1,519**	**1,679**

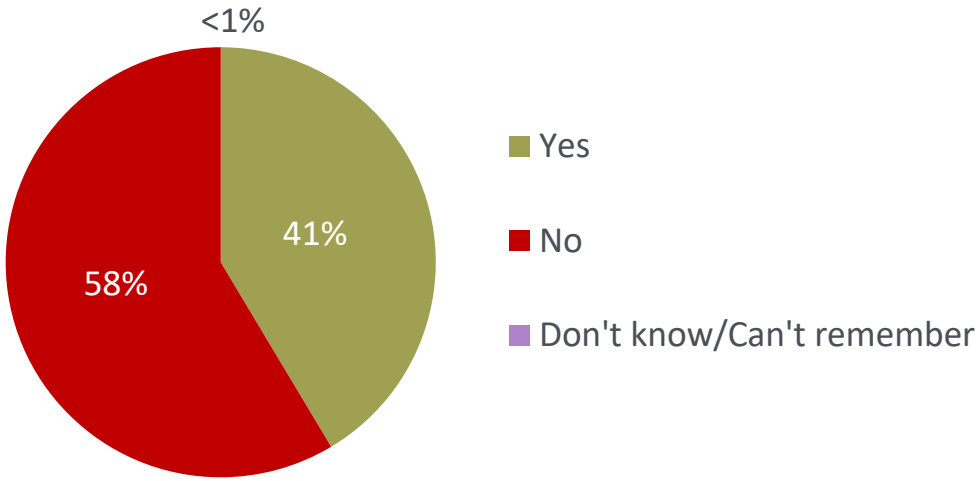
Health problem	2014	2019
Yes	7%	9%
No	91%	90%
Prefer not to say	2%	1%
Base	**1,519**	**1,679**

Working status	2014	2019
Working full time	55%	55%
Working part time	6%	7%
Self-employed	3%	5%
Unemployed	0%	1%
Retired	25%	25%
Looking after home/family	2%	2%
Permanently sick or disabled	0%	1%
Student	4%	3%
Other	-	<1%
Prefer not to say	4%	<1%
Base	**1,519**	**1,679**

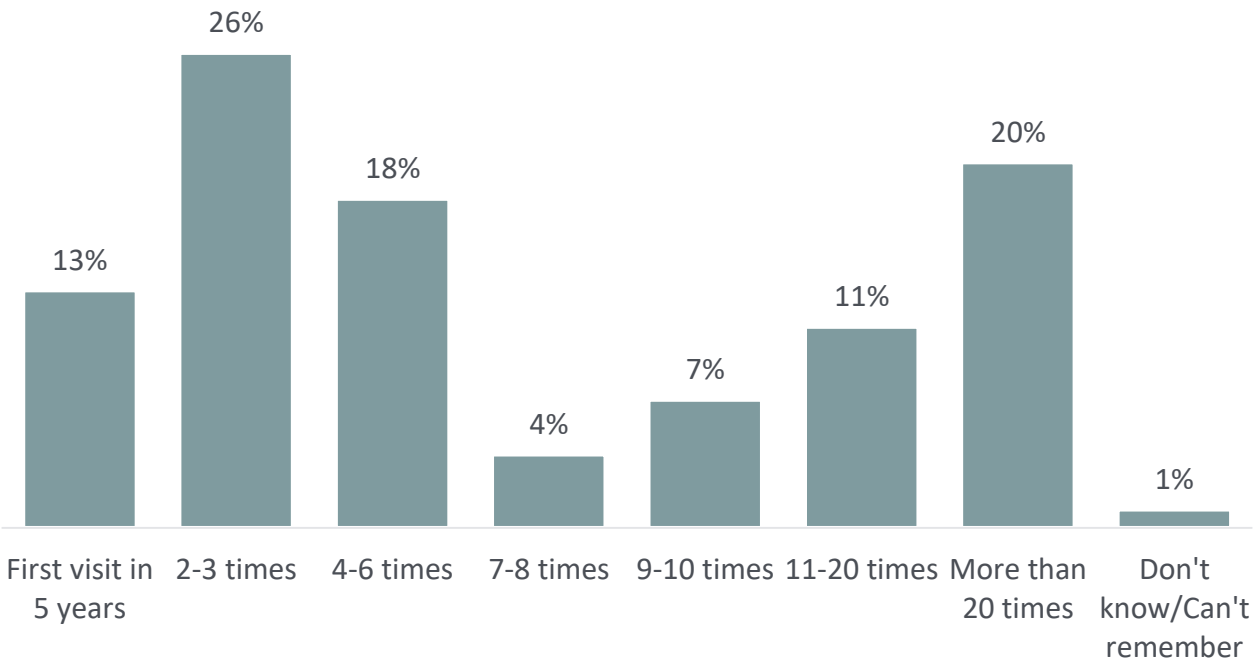
SEG	2014	2019
AB	31%	36%
C1	44%	39%
C2	13%	15%
DE	3%	7%
Prefer not to say	8%	3%
Base	**1,519**	**1,679**

6/10 were repeat visitors – indicating that the park delivers a good visitor experience, motivating people to return (and a substantial minority visit very frequently)

First time visitors



No. visits in last 5 years (repeat visitors)

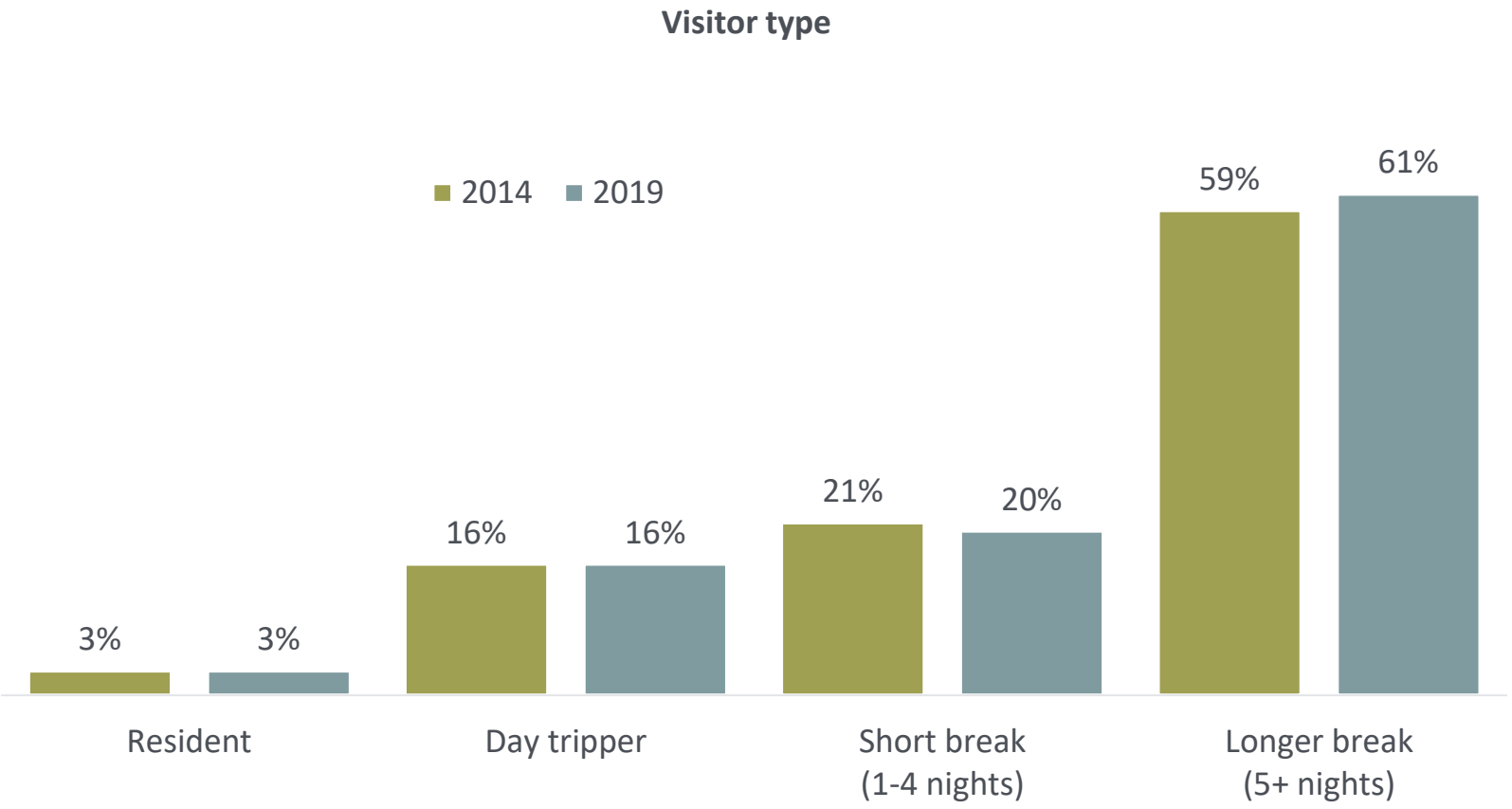


NB: 2014 data not directly comparable due to changes in question wording – but 40% said it was their 'first visit in 5 years' in 2014.

Q9. Is this your first visit to the National Park?
Base (all visitors): 2019 1,629

Q10. Including this visit, how many times have you visited the Cairngorms area in the last five years?
Base (all repeat visitors): 941

Around 1/5 were day visitors and 4/5 were overnight visitors – with the balance towards longer trips. Very consistent findings across surveys



Derived from SQ2, Q3, Q4. Base (all): 2014 1,519, 2019 1,679

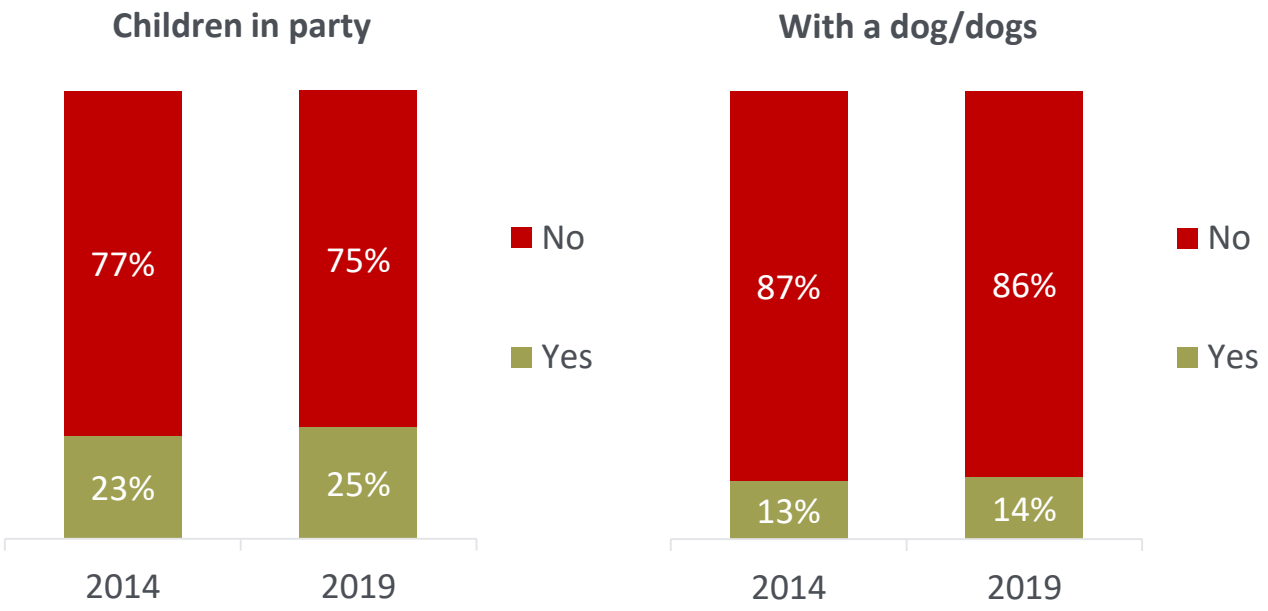
NB a very small number of residents (n=6) reported they were staying overnight in 2019. These are treated as residents rather than overnight visitors for analysis by visitor type

The Cairngorms is primarily a destination for couples and families. A quarter had children in their party; 14% were with dogs. Group composition was very similar to 2014

Number in party	2014	2019
One	9%	9%
Two	52%	54%
Three	11%	11%
Four	15%	14%
Five+	13%	12%
Base	**1,519**	**1,679**

Average number in party	2014	2019
Average number of adults	2.7	2.5
Average number of children*	2.2	2.1
Average group size	3.3	3.0
Base	**1,519**	**1,679**

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



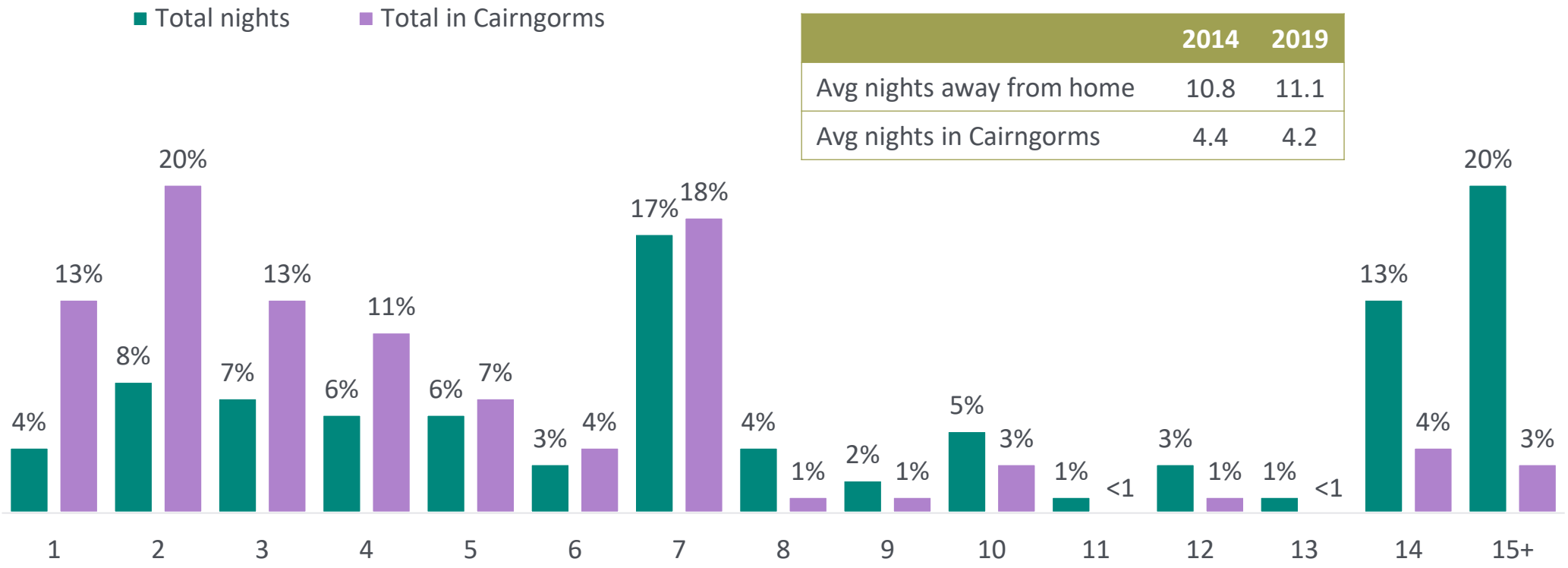
Derived from Q11. Including yourself, how many people in your party are in the following age groups? (Children = under 18s)
Base (all): 2014 1,519, 2019 1,679

Q12. Do you have a dog/dogs with you on this trip?
Base (all): 2014 1,519, 2019 1,679

Visit characteristics

Number of nights in the Cairngorms area tends to be a week or less (87%) – similar to 2014

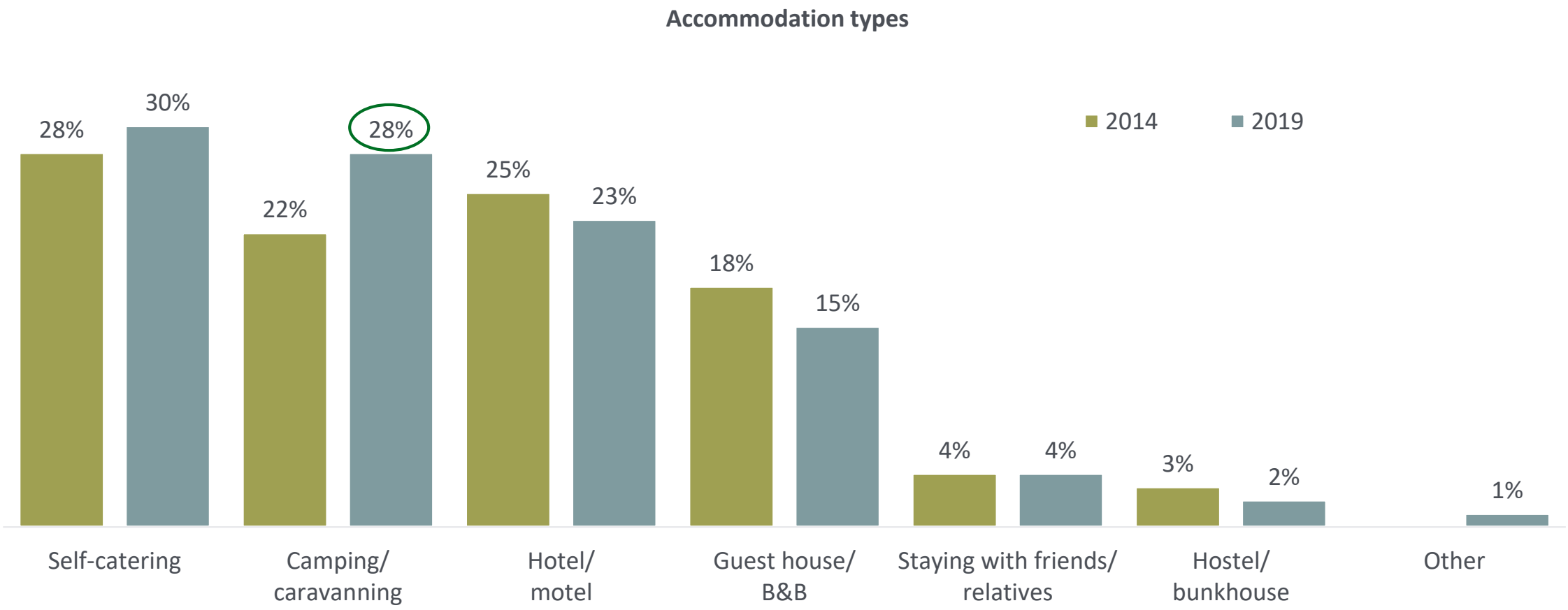
Number of nights away from home (total) and in the Cairngorms - 2019



	2014	2019
Avg nights away from home	10.8	11.1
Avg nights in Cairngorms	4.4	4.2

Q4. How many nights IN TOTAL will you be spending away from home on this trip? Base (all visitors away from home): 1,360
Q5. How many of these nights will you be spending in the Cairngorms area? Base (all visitors staying in Cairngorms): 1,096

Visitors use a variety of accommodation types. Self-catering was most popular, followed by camping/caravanning – and more people mentioned camping/caravanning in 2019 than had done so in 2014



Q17. During your stay in the Cairngorms area, which type(s) of accommodation have you, or will you use?
Base (all visitors staying in Cairngorms): 2014 987, 2019 1,083

Changes in response options mean data is not directly comparable, but it appears that the increase in camping/caravanning overall has been driven by slightly higher motorhome/ campervan use (an increase from 7% to 12% of those staying in the Cairngorms), and wild camping (from 3% to 5%)

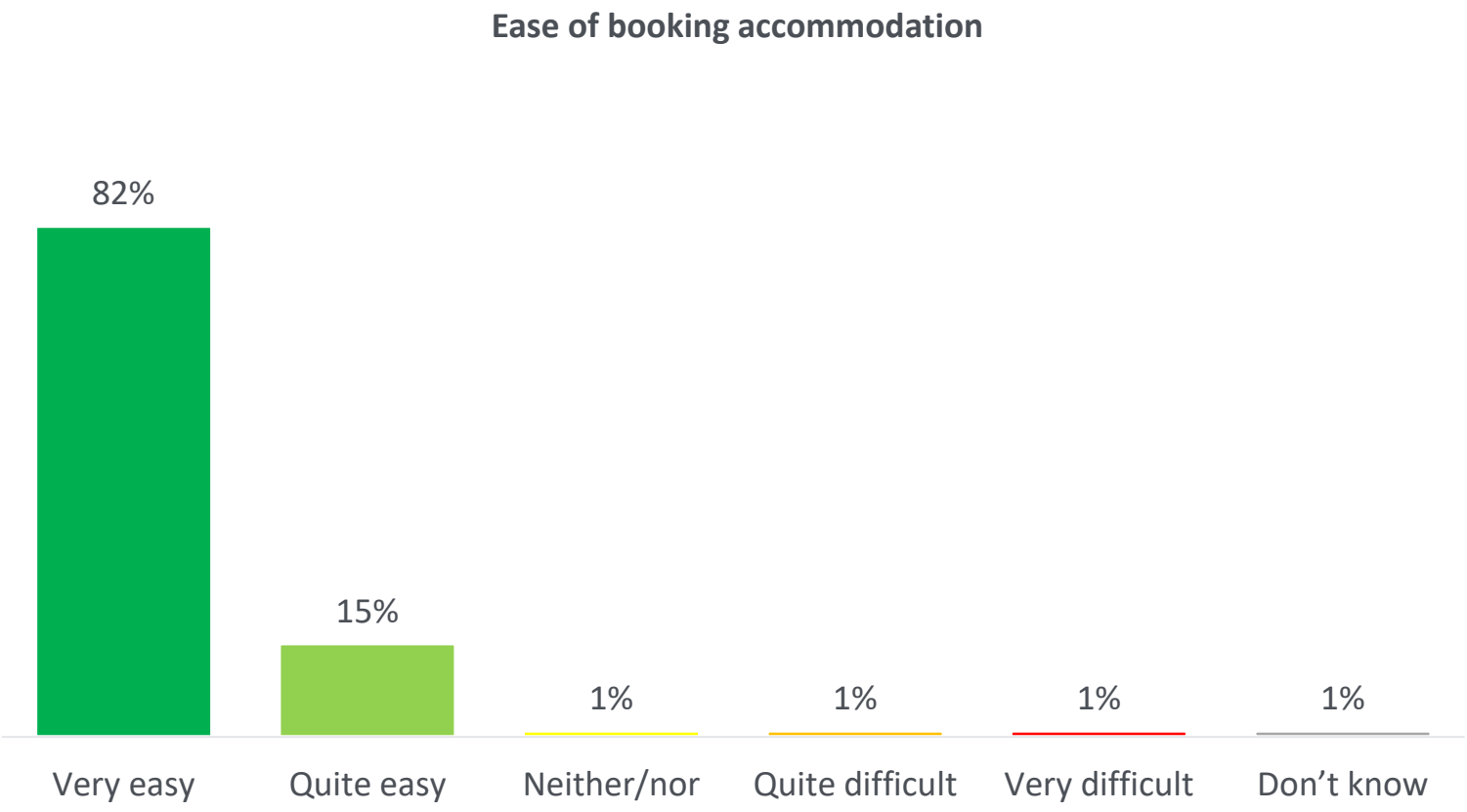
Breakdown of responses for camping/caravanning accommodation	2014	2019
Static caravan – rented	2%	2%
Static caravan – owned	1%	1%
Touring caravan	3%	4%
Motorhome/campervan – on a campsite		8%
Motorhome/campervan – somewhere with no facilities		4%
Motorhome	***7%***	***12%***
Tent – formal campsite/designated area with limited facilities *2014 wording: Tent in campsite*	6%	6%
Tent – wild camping (not on a site) *2014 wording: Wild camping*	3%	5%
Luxury camping / glamping – e.g. yurts, pods, wigwams, etc.		1%
Base (all staying in the Cairngorms)	**987**	**1,085**

2019 overall % is based on those selecting **either** of the motorhome/campervan options above – this was a multi-coded question

Luxury camping – option added in 2019

Q17. During your stay in the Cairngorms area, which type(s) of accommodation have you, or will you use?
Base (all visitors staying in Cairngorms): 2014 987, 2019 1,083

No problems with booking accommodation – 97% overall found it easy (and 82% said 'very' easy)

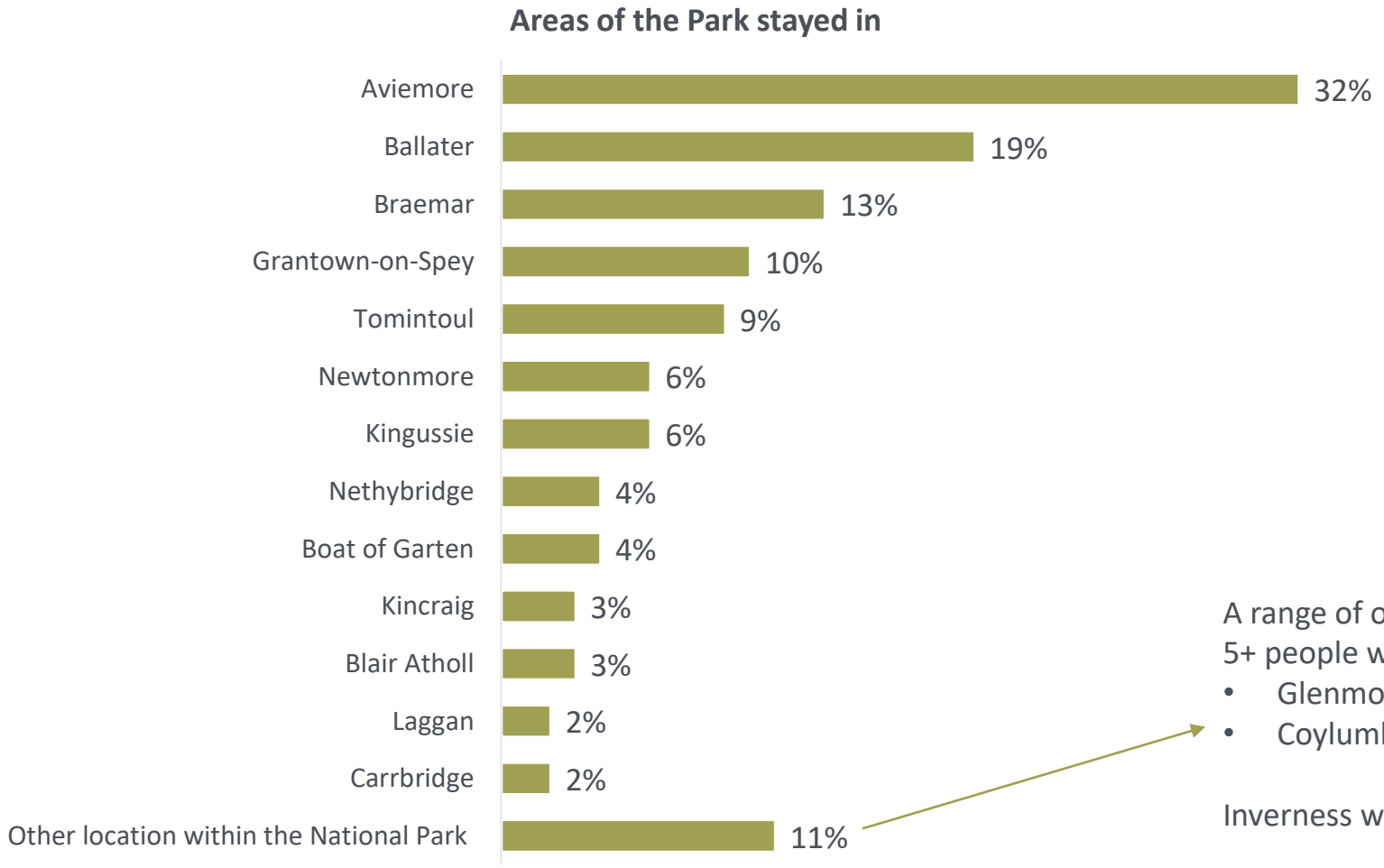


Among the 17 people who reported booking was quite or very difficult, the main reasons given were:

- Limited availability of accommodation at **price** I was looking for (mentioned by 9 respondents)
- Limited availability of accommodation in **location** I was looking for (7 respondents)
- Problems with **communications** with accommodation providers during the booking process (1 respondent)
- Other reason (2 respondents)

Q19. How easy did you find it to book your accommodation?
Base (all visitors staying in Cairngorms in paid for accommodation, excluding those who did not book it themselves): 790

Visitors were staying across a range of locations, with Aviemore most often mentioned



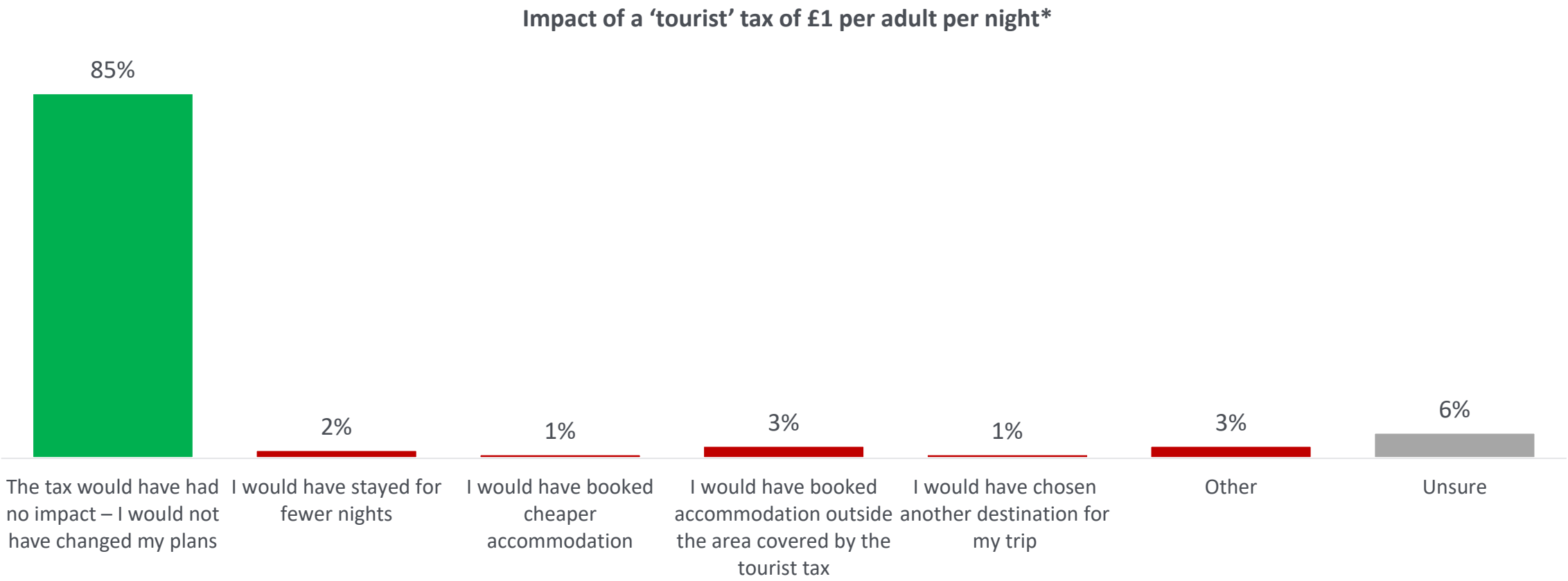
A range of other locations was mentioned – the only ones listed by 5+ people were:

- Glenmore (19 people)
- Coylumbridge (6 people)

Inverness was also mentioned by 6 respondents and Aboyne by 5.

Q18. During your stay in the area, where have you stayed/will you stay? Base (all visitors staying in Cairngorms): 1,085

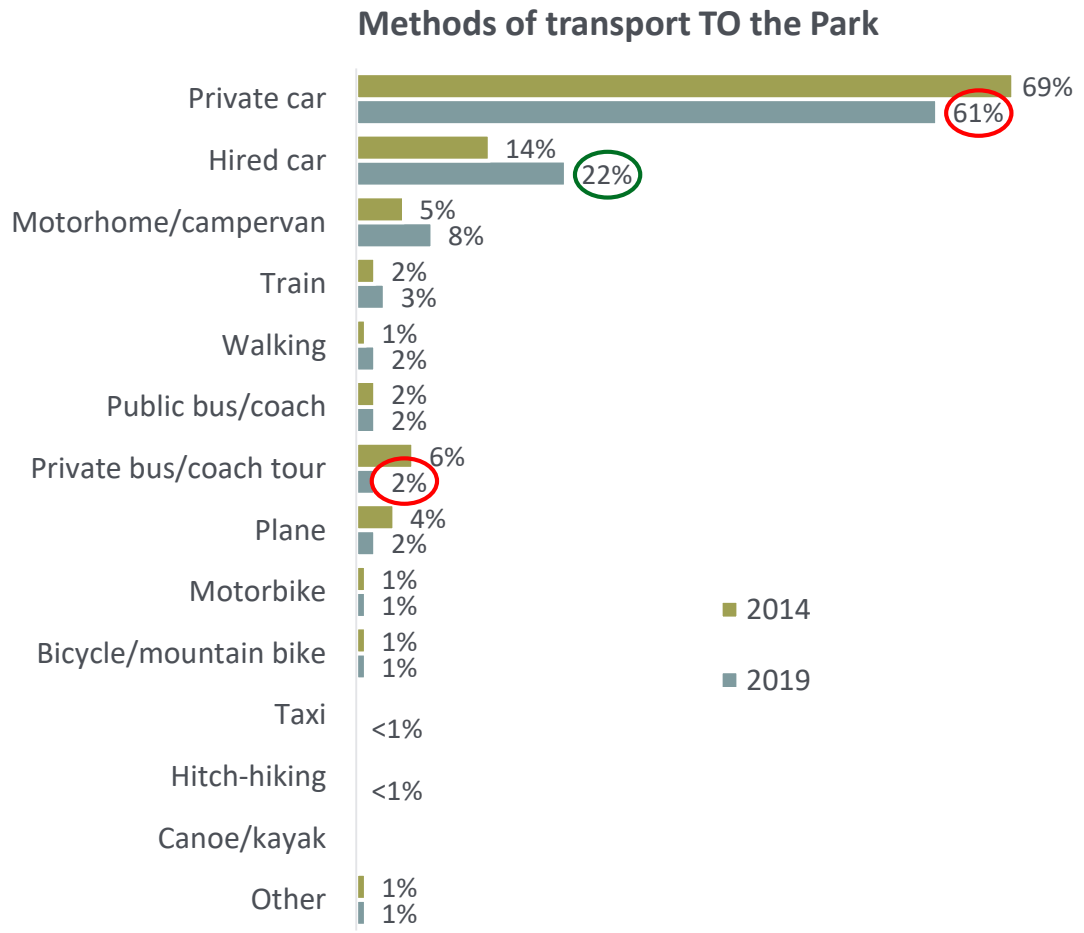
A TVL would not have changed most people's plans – 85% said it would have had no impact

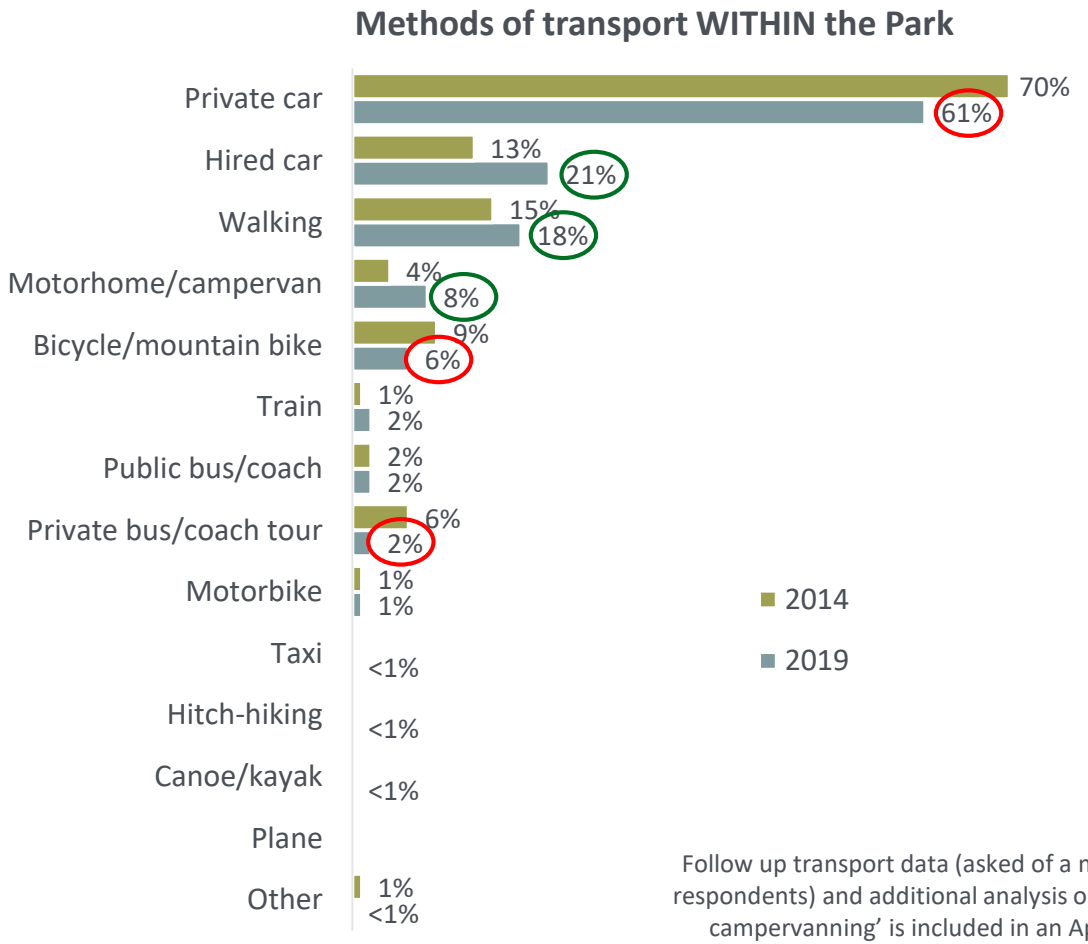


* Additional analysis for those who said they ***would*** have changed their plans is included in an Appendix to this report

Q37. Some local authorities in Scotland are looking at options to charge an overnight visitor levy, sometimes known as a 'tourist tax'. If a charge of around £1 per adult per night had been in place when you were considering coming to the Cairngorms National Park, what impact would it have had on your decision to stay here? Base (all staying in the Park in paid for accommodation): 888

Car is still the main mode of transport both to and within the Park – though more people hired cars and fewer used private cars in 2019





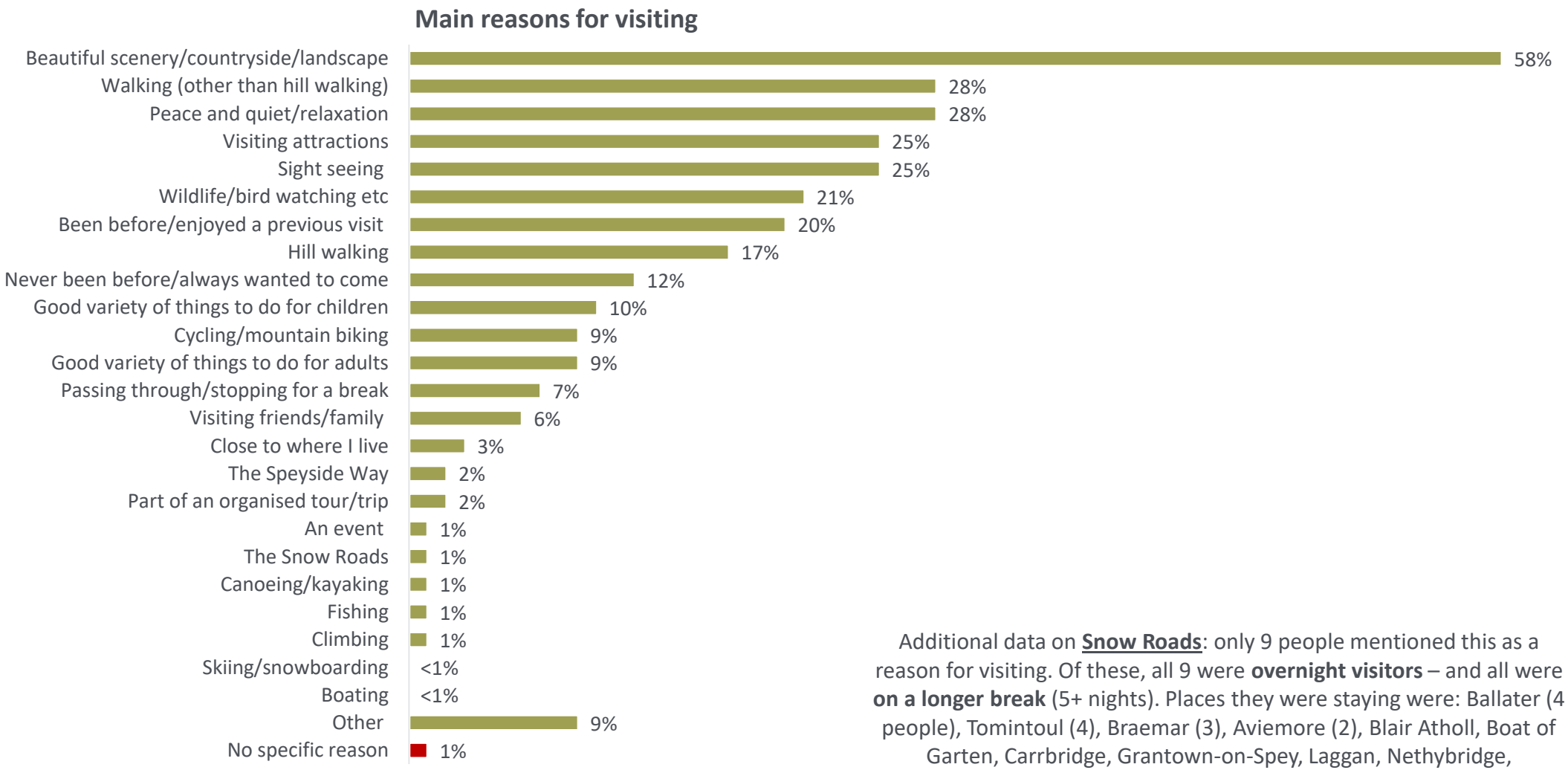
Follow up transport data (asked of a minority of respondents) and additional analysis on 'freedom campervanning' is included in an Appendix

Q21. Which form(s) of transport did you use to get to the Cairngorms area?
Base (all visitors): 2014 1,467, 2019 1,629. ***NB some response options added in 2019***

Q22. Which form(s) of transport, if any, have you / will you use within the National Park area?
Base (all): 2014 1,519, 2019 1,679. ***NB some response options added in 2019***

Reasons for visiting

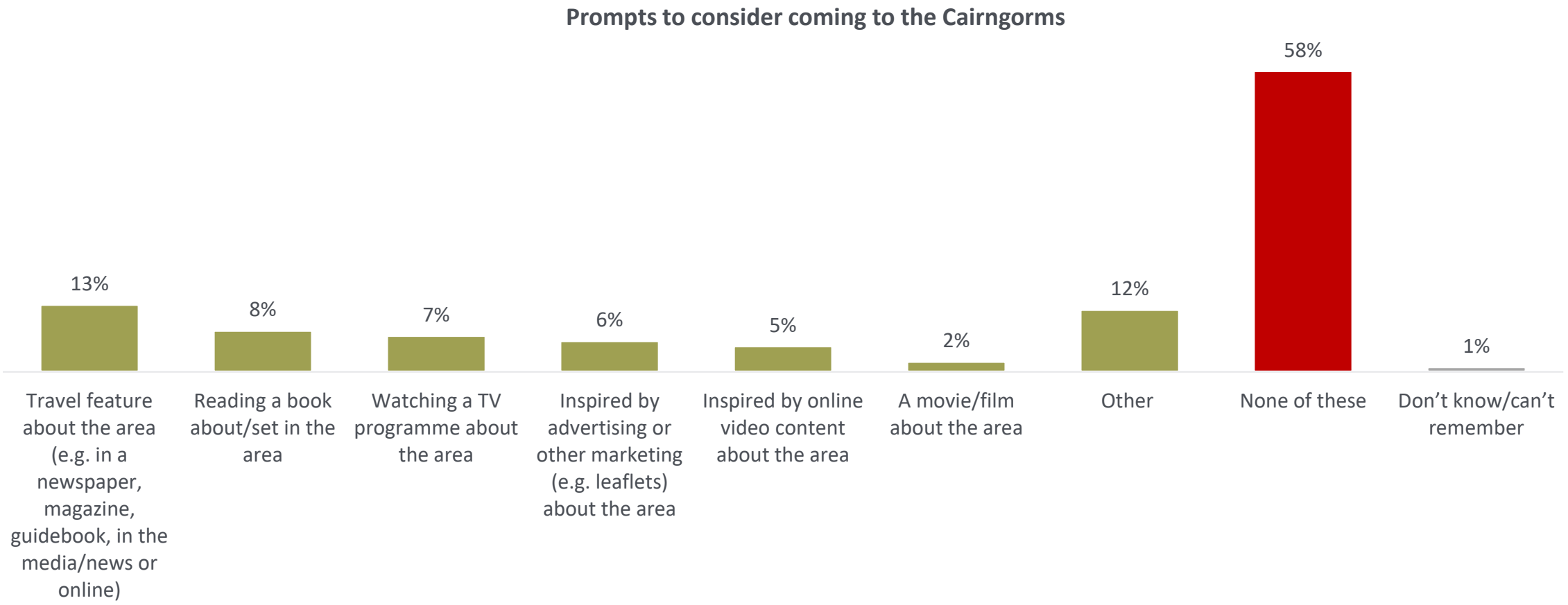
The main draw is the beautiful scenery, countryside and landscape – by far the most cited reason for choosing the area (58%)



Additional data on **Snow Roads**: only 9 people mentioned this as a reason for visiting. Of these, all 9 were **overnight visitors** – and all were **on a longer break** (5+ nights). Places they were staying were: Ballater (4 people), Tomintoul (4), Braemar (3), Aviemore (2), Blair Atholl, Boat of Garten, Carrbridge, Grantown-on-Spey, Laggan, Nethybridge, Newtonmore (all mentioned by 1) – this was a multi-coded question.

Q13. What were your main reasons for choosing to visit the Cairngorms area on this trip? Base (all): 1,679
NB different response options in 2014 so data not directly comparable

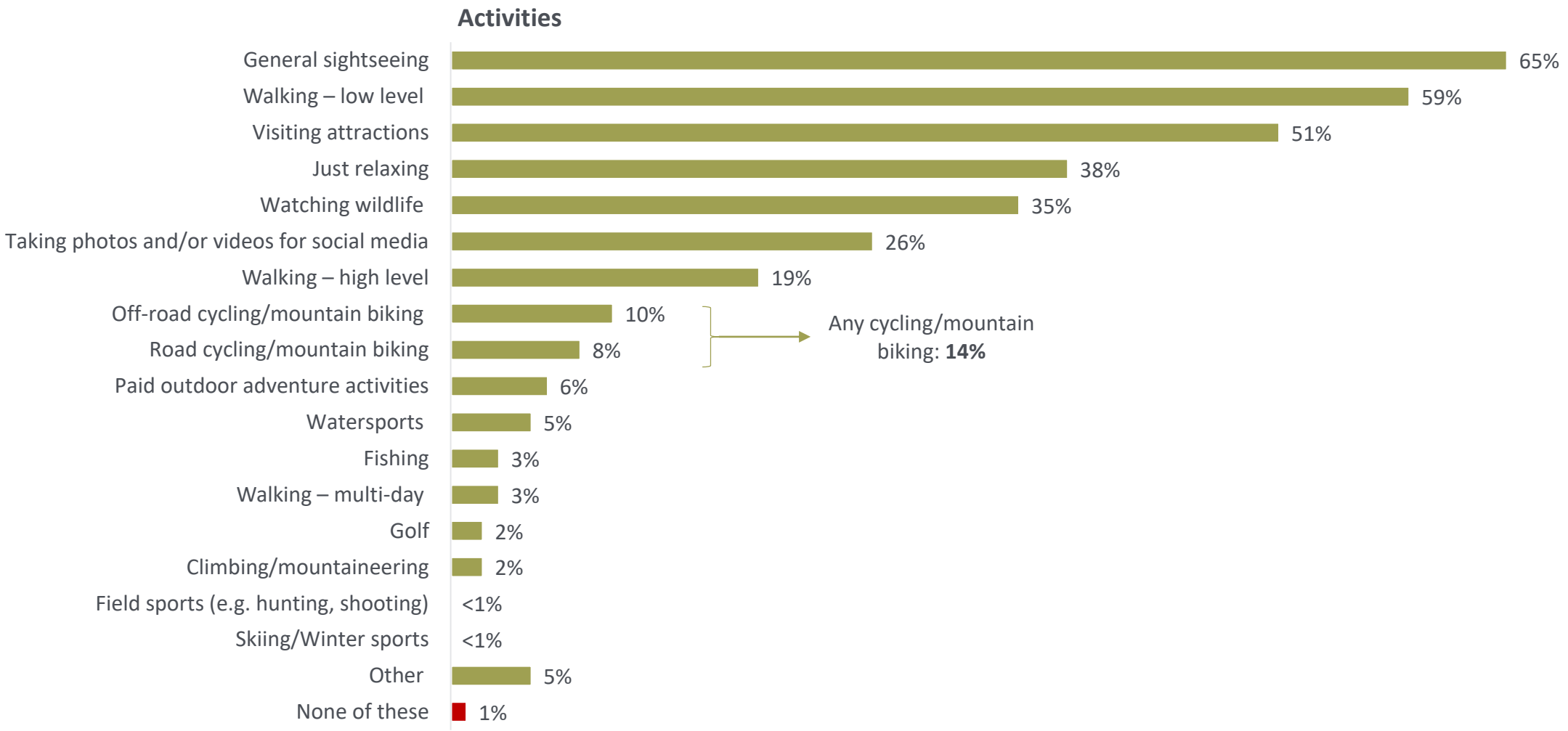
The majority had not been prompted by anything specific to come to the area. A travel feature was the most commonly mentioned inspiration



Q14. Did any of the following things prompt you to consider coming to the Cairngorms? Base (all visitors): 1,629

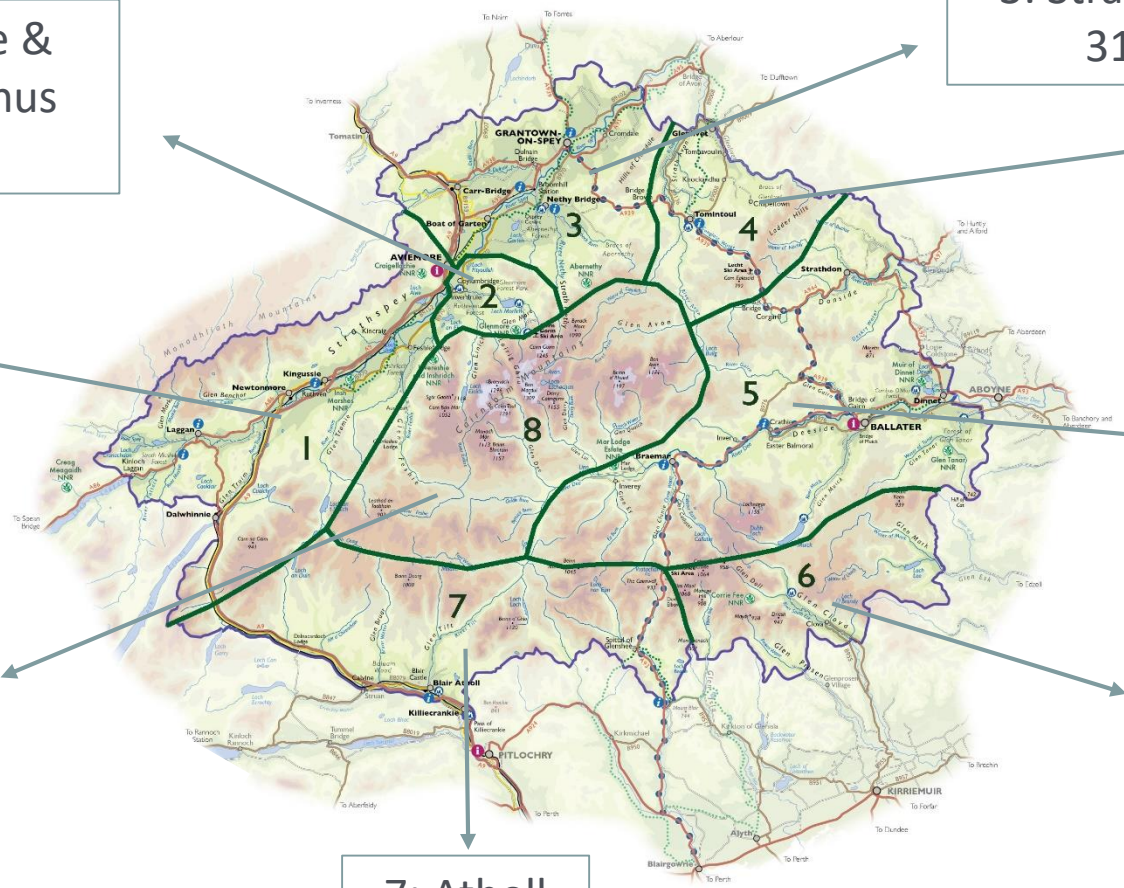
Activities undertaken

Most common activities undertaken were general sightseeing, low level walking and visiting attractions



Q27. During this *[trip to/day out in]* the area, which activities, if any, have you or will you take part in? Base (all): 1,679
NB different response options in 2014 so data not directly comparable

Highest proportions were walking/cycling in Glenmore & Rothiemurchus, Badenoch, Strathspey and Deeside & Donside



2: Glenmore & Rothiemurchus 36%

3: Strathspey 31%

4: Glenlivet 12%

1: Badenoch 32%

5: Deeside & Donside 30%

8: Cairngorm plateau 21%

6: Angus Glens 9%

7: Atholl 8%

Q28. SHOW MAP B. Can you show me roughly on this map where you have/will be *[walking/cycling]* during your visit? Base (all walking or cycling): 1,174

Loch Morlich and Balmoral Castle were the most popular attractions, followed by Loch an Eilein and the Highland Wildlife Park

Attractions	2019
Loch Morlich	27%
Balmoral Castle	21%
Loch an Eilein	18%
Highland Wildlife Park	17%
Loch Garten Osprey Centre (RSPB)	14%
Highland Folk Museum	13%
Landmark Forest Heritage Park	13%
Rothiemurchus estate / visitor centre	13%
Braemar Castle	12%
Cairngorm Mountain / ski centre	12%
Glenlivet Distillery	12%

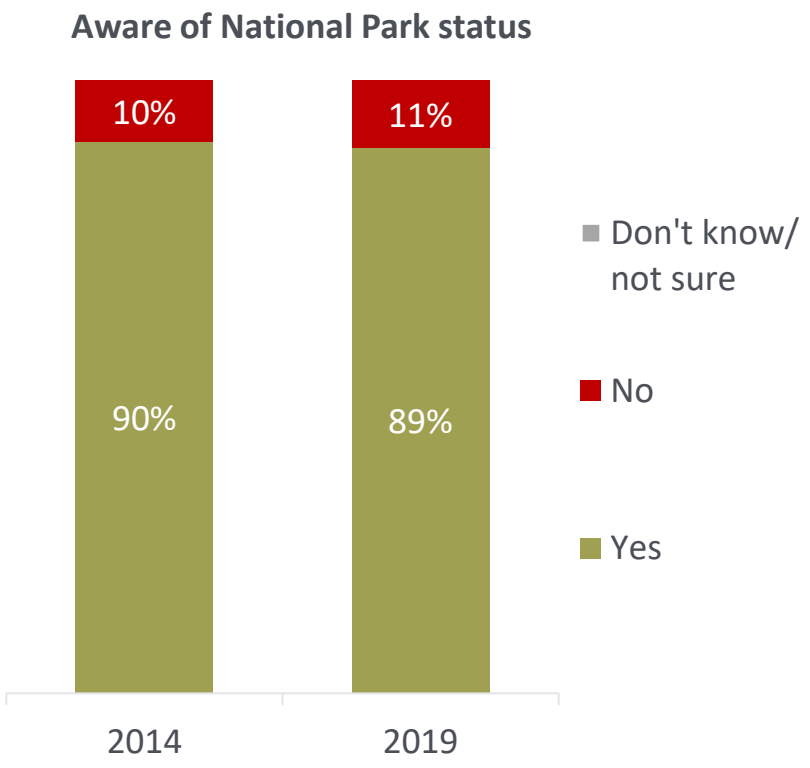
Attractions	2019
Loch Muick	11%
Linn of Dee	10%
Tomintoul Museum	10%
Glenmore Forest Visitor Centre	9%
Strathspey Steam Railway	9%
Burn o Vat	8%
Blair Castle	7%
Dalwhinnie Distillery	7%
Cairngorm Reindeer Centre	6%
Corgarff Castle	6%
Royal Lochnagar Distillery	6%

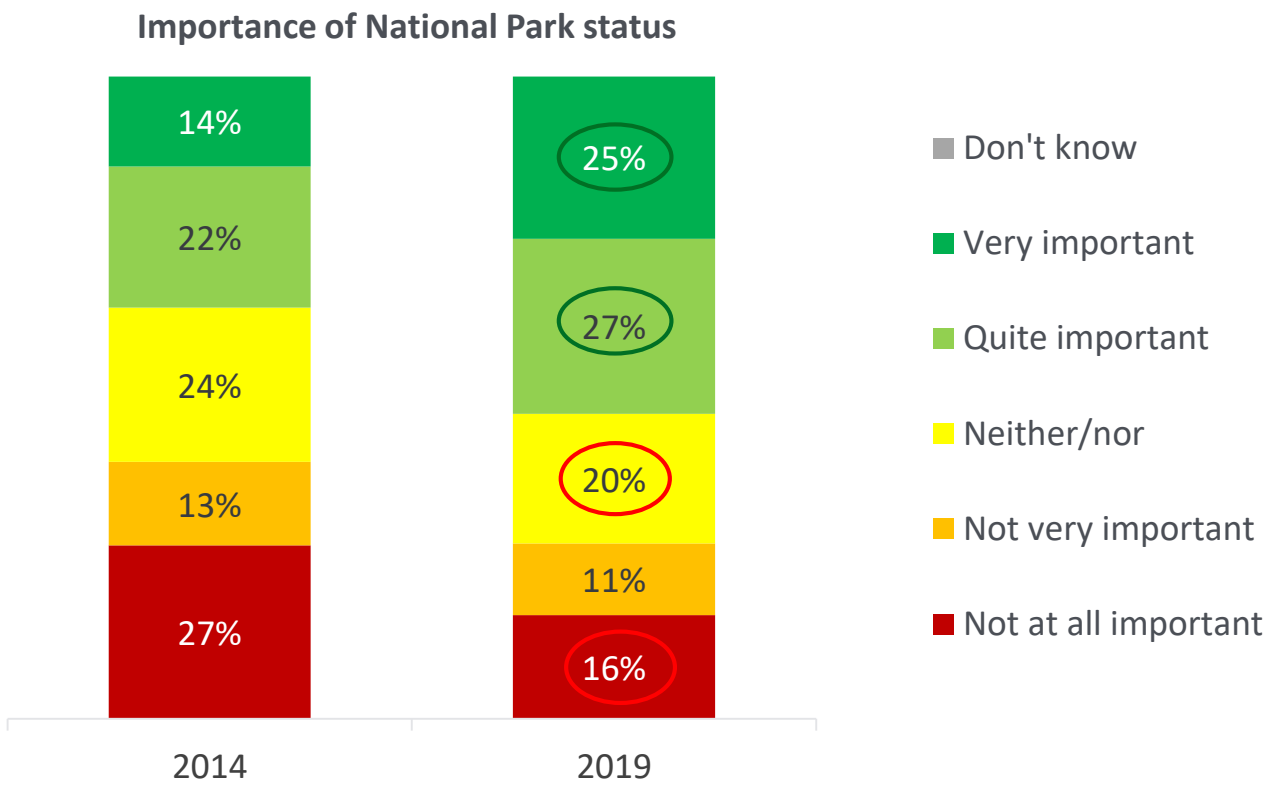
Attractions	2019
Speyside Heather Centre	6%
Grantown Museum	5%
Insh Marshes	4%
Ruthven Barracks	3%
Uath Lochans	3%
Braemar Highland Heritage Centre	2%
Glenshee ski centre	2%
Killiecrankie visitor centre	2%
Leault Farm Working Sheepdogs, Kincraig	1%
Other	11%
Base (all excluding 'none of these')	**1,305**

Q30. SHOWCARD C. Which attraction(s) have you, or do you intend to, visit during your *[trip to/day out in]* the Cairngorms area? Base (all excluding 'none of these'): 1,305
NB question only asked of those selecting 'visiting attractions' as an activity in 2014, and slightly different attraction list, so data not directly comparable

Awareness & perceptions of the National Park

National Park status was well understood by visitors – 9/10 were aware, very consistent with 2014. Half (52%) said this was important in deciding to visit – an increase since the last survey (36%)

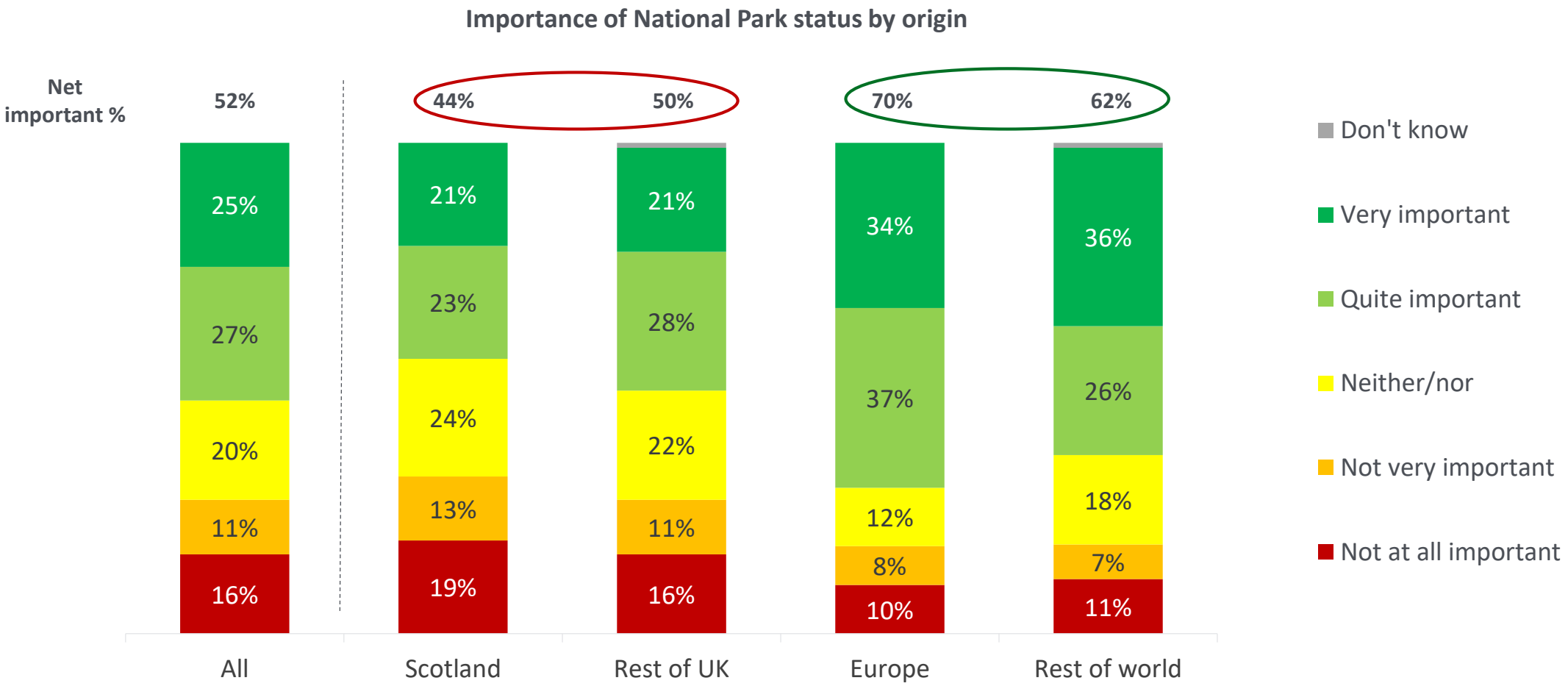




Q15. Before today, were you aware that this area is a National Park?
Base (all visitors): 2014 1,467, 2019 1,629. ***NB 2014 question wording was slightly different: Are you aware that you are in a National Park? (and no DK option)***

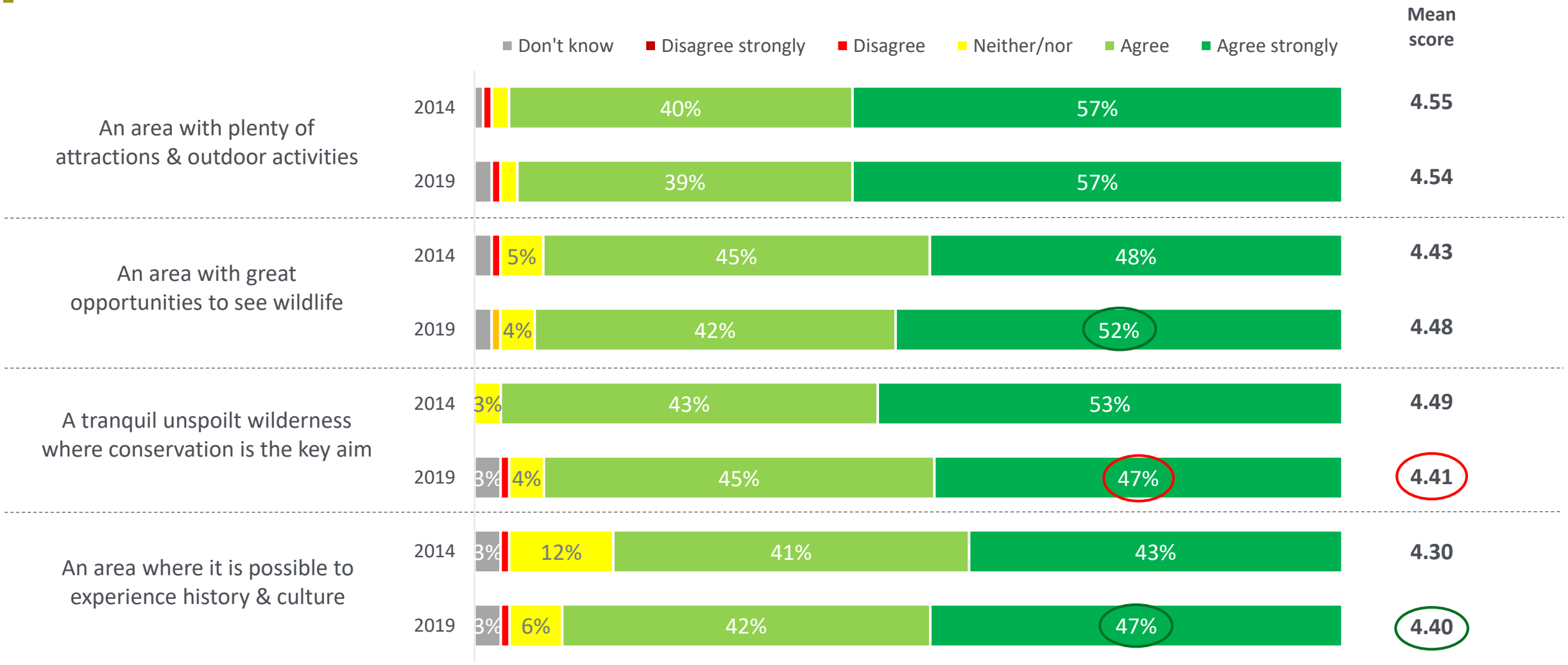
Q16. In your decision to visit the Cairngorms area, how important was the fact that this area is a National Park? Base (all aware of NP status): 2014 1,317, 2019 1,442

National Park status was more important to those from Europe (70% said very or quite important) and rest of the world (62%) than it was to Scotland (44%) and rest of UK visitors (50%)



Q16. In your decision to visit the Cairngorms area, how important was the fact that this area is a National Park? Base (all aware of NP status): 2019 1,442

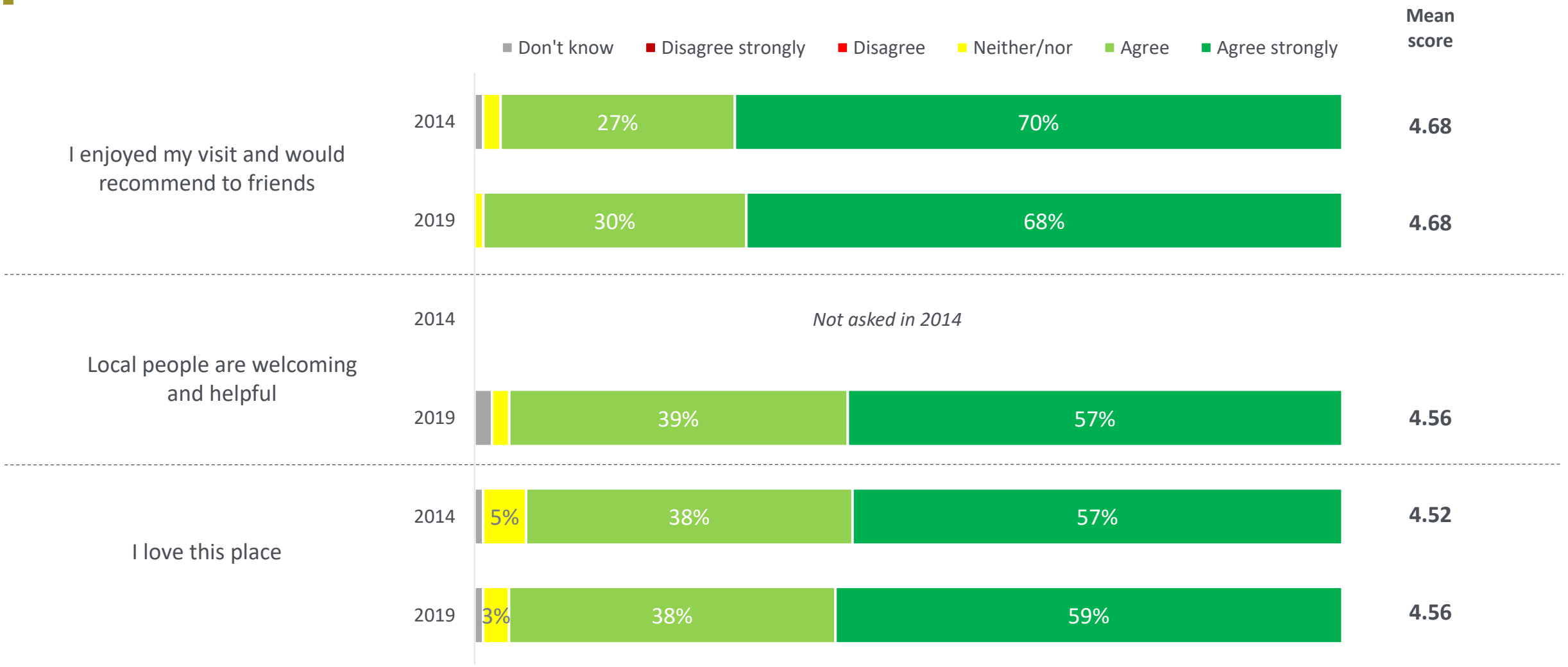
High levels of agreement with all statements, especially re attractions and outdoor activities. Mostly consistent with 2014, though agreement with 'tranquil unspoilt wilderness where conservation is key aim' is down, and agreement with 'possible to experience history and culture' is up



Q31. For each of the following statements, please tell me how much you agree or disagree that the statement describes the Cairngorms area? Base (all visitors 2014): 1,467, Base (all 2019): 1,679

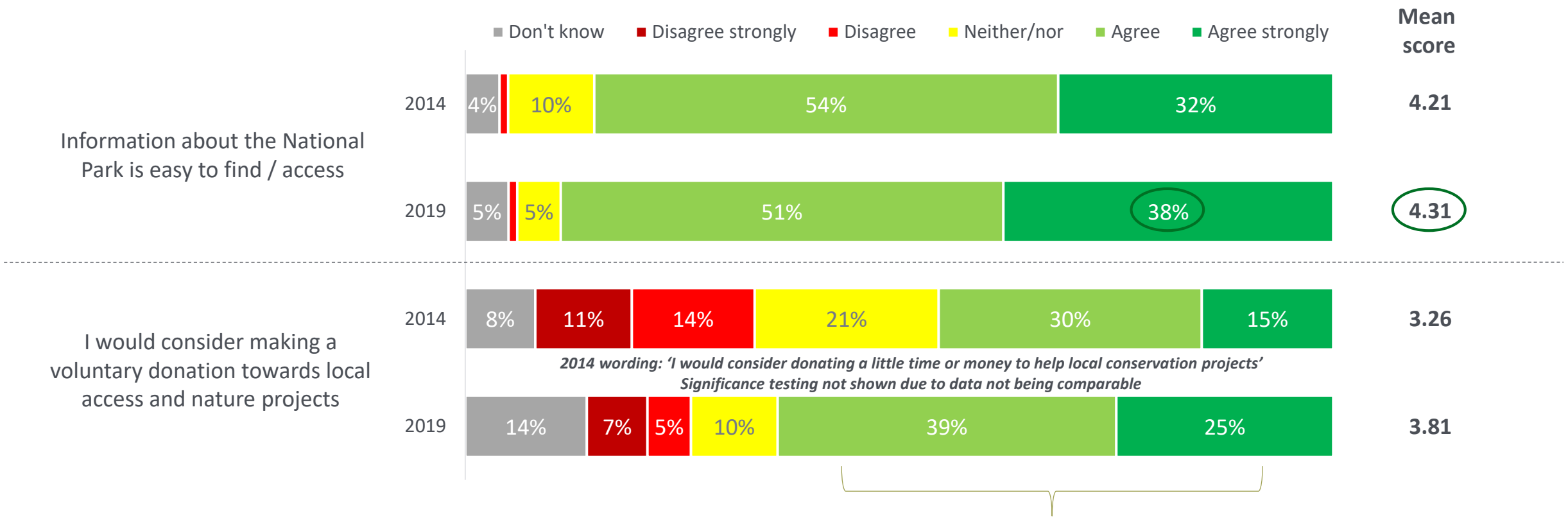
NB 2014 question asked of visitors only, about expectations prior to visiting and now you are here – data shown is for 'now you are here'

Very high levels of agreement with these statements – indicating high satisfaction with visitor experience. Results very similar to 2014 findings



Q32. I would like to read out a number of statements which other visitors have made about the area. Please tell me how much you agree or disagree with each of these statements. Base (all): 2014 1,519, 2019 1,679

Slightly lower levels of agreement in relation to voluntary donations to local projects compared to the other statements – although agreement is higher than in 2014 (though please note question wording not directly comparable). There was little difference by origin here, though European visitors were less likely to agree than Scotland respondents. Agreement has also increased that information is easy to find / access



	All	Scotland	rUK	Europe	Rest of world
Would consider a voluntary donation	64%	65%	64%	58%	67%

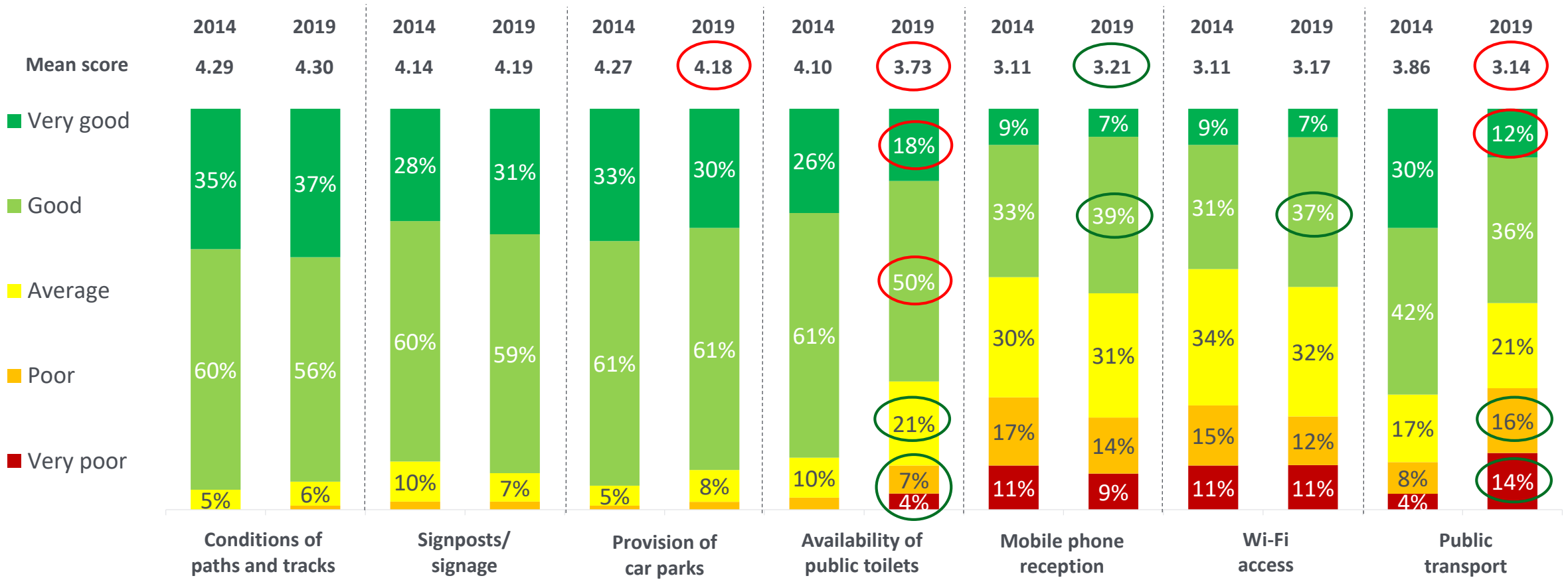
Q32. I would like to read out a number of statements which other visitors have made about the area. Please tell me how much you agree or disagree with each of these statements. Base (all): 2014 1,519, 2019 1,679

Ratings and areas for improvement

Most facilities rated highly, although the balance was towards 'good' rather than 'very good'. Public transport, mobile reception and Wi-Fi access were less well rated, although more now rate mobile reception and Wi-Fi access as 'very good' than in 2014. Ratings have declined for public transport and availability of public toilets, and to a lesser extent, provision of parking

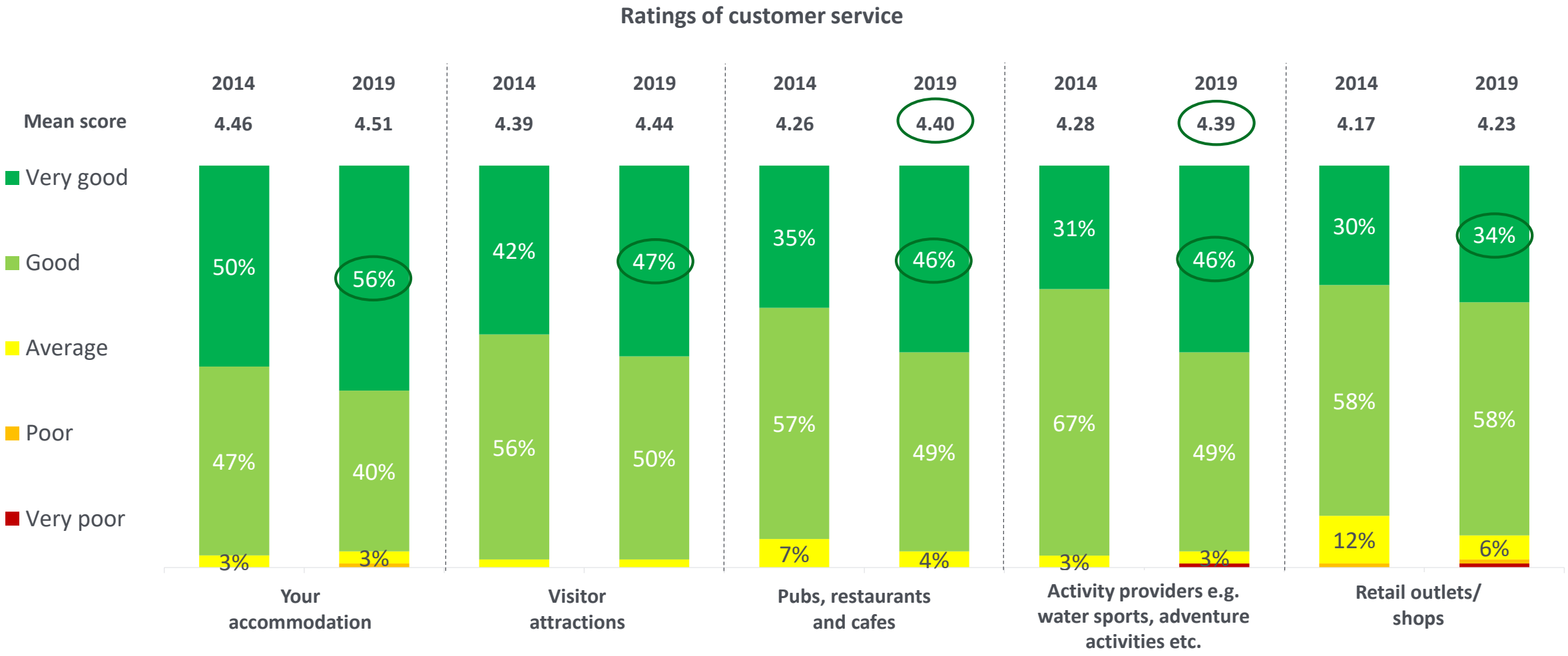
progressive

Ratings of facilities in the National Park



Q34. How would you rate the following facilities in the National Park? Base (all who used facilities): 2014 283-1,477, 2019 325-1,613. *NB 2014 'Signposts' (not 'Signposts/signage')*

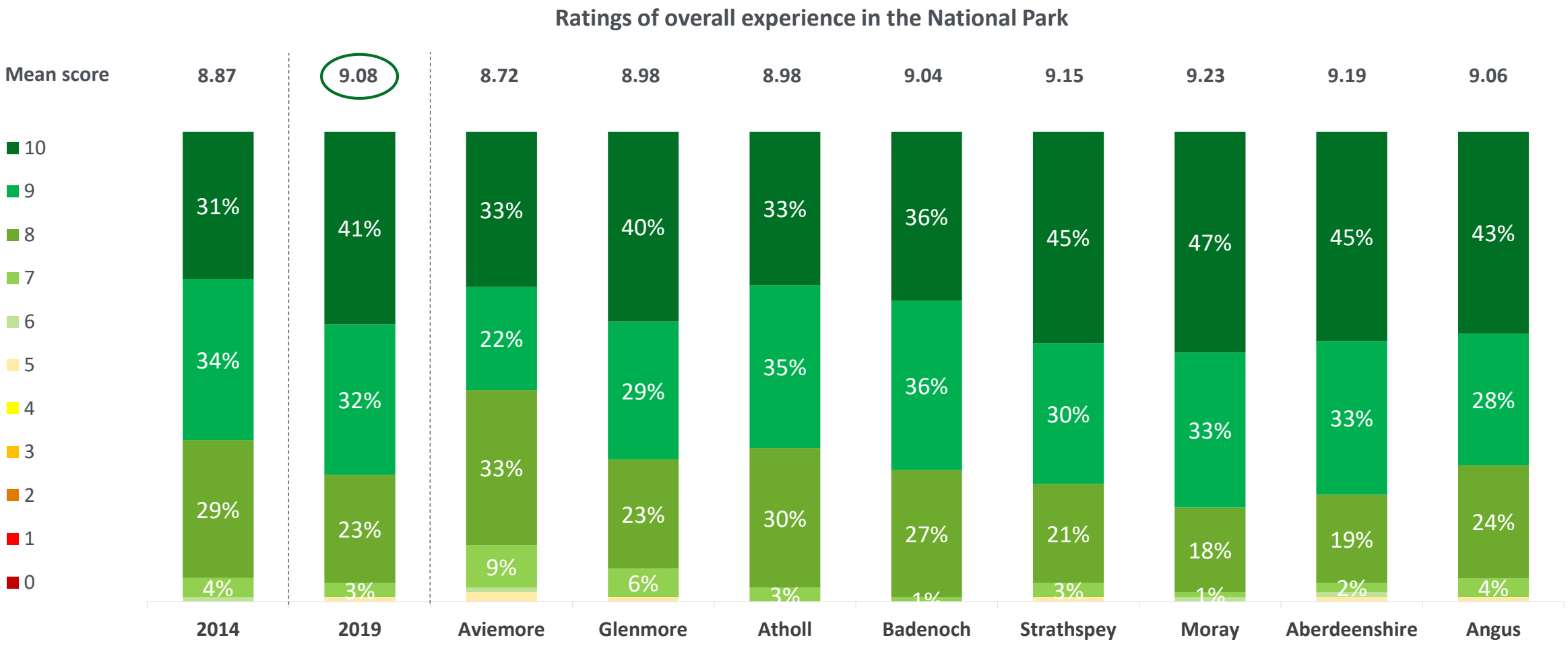
Ratings of customer service also very high – mean scores have improved for pubs, restaurants and cafes and activity providers, and more rate each aspect as 'very good' than they did in the previous wave



Q35. And please tell me how you would rate the customer service provided by staff at facilities you have used in the area this trip? Base (all who used facilities): 2014 827-1,040, 2019 532-1,323

NB 2014 'Pubs and restaurants' (not 'Pubs, restaurants and cafes'), 'Activities' (not 'Activity providers e.g. water sports, adventure activities etc')

Rating of the overall experience in the Cairngorms area has increased significantly since 2014. No significant differences in ratings between any of the individual areas and the sample as a whole



Q36. Using a rating scale from 1 to 10, with 1 being very poor and 10 being very good, how would you rate your overall experience of the Cairngorms area? Base (all): 2014 1,519, 2019 1,679

Very few suggestions for improvement made – half said nothing needed improvement. More public toilets and more/better signage were the two most common practical suggestions

Improvements	2019
More public toilets	8%
The weather	7%
More/better signs/directional signage	5%
More parking	4%
Better public transport	4%
More better visitor information/information boards/interpretation signage	3%
New roads/better roads/faster roads	3%
Longer opening times for cafes/shops/attractions	3%
Better Wi-Fi/TV/phone/broadband signal	3%

Improvements	2019
Improve quality of public toilets	2%
Improve quality/choice of cafes/restaurants	2%
More litter bins/clean it up/cleanliness of Park	2%
Improve quality/choice of shops	1%
More Rangers	1%
More/better mountain biking trails	1%
More/better skiing facilities	1%
More family orientated activities	1%
More/better marked walks/paths	1%

Improvements	2019
Cheaper accommodation	1%
Cheaper restaurants/shops	1%
Cheaper attractions	1%
Cheaper/free parking	1%
More/better attractions	<1%
Better quality accommodation	<1%
More/better sport activities	<1%
Other*	***15%***
Nothing	***50%***
Don't know	***5%***
Base (all)	**1,679**

* A range of 'other' responses were given, but worth noting that 35 people mentioned issues relating to the funicular/mountain railway

Q33. What, if anything, could be improved to make your *[visit to/day out in]* the area more enjoyable? Base (all) 1,679
NB 2014 code list was slightly different so data not directly comparable

Top three responses (apart from none/other) varied slightly by origin

Residents	
Better public transport	16%
More public toilets	10%
More parking	8%
Base	**50**

Scotland	
More public toilets	11%
The weather	7%
Better public transport	4%
Base	**712**

Rest of UK	
The weather	9%
More public toilets	7%
More better visitor information/information boards/interpretation signage	4%
Base	**381**

Europe	
More/better signs/directional signage	7%
The weather	6%
New roads/better roads/faster roads	5%
Base	**349**

Rest of the world	
More public toilets	6%
More/better signs/directional signage	6%
The weather	5%
Base	**187**

Q33. What, if anything, could be improved to make your *[visit to/day out in]* the area more enjoyable? Base (all) 1,679

Summary

Summary

Visitor profile

- The vast majority of respondents (97%) were visitors; only 3% were residents of the area.
- The visitor profile is skewed to higher socio-economic groups, but with a spread of age and gender.
- Most were repeat visitors to the area, with 41% first time visitors.
- Visitors are most likely to come from Scotland (44%) and a quarter (23%) were from the rest of the UK. A fifth (21%) were from Europe and 11% from the rest of the world.
- The average group size was 3 people, and a quarter of respondents had children in their party.
- Six in ten (61%) were on a longer break away from home (5+ nights), with 20% on a shorter break, 16% on a day trip from home and 3% being residents.
- The visitor profile was very consistent with that seen in the 2014 survey.

Visit characteristics

- The majority of visitors were away from home on holiday, and were spending an average of 11.1 nights away from home – an average of 4.2 nights in the Cairngorms area.
- Self-catering accommodation was most popular, followed by camping/caravanning and then hotels/motels – camping/caravanning was more often mentioned in 2019 compared to 2014, when hotels had been more popular than camping.
- People staying in the Cairngorms mentioned a range of locations across the park, with Aviemore being mentioned most frequently (32%).
- The vast majority reported that booking accommodation had been very or quite easy – and 8 in 10 said it was very easy.
- The majority of visitors (61%) arrived by private car, although more people hired cars and fewer used private cars in 2019 than had done so in 2014.

Summary

Reasons for visiting and activities undertaken

- The most commonly mentioned reason for visiting the Cairngorms was the beautiful scenery, countryside and landscape – by far the most cited reason for choosing the area (58%).
- Other common reasons for visiting were: walking (other than hillwalking), peace and quiet/relaxation (both mentioned by 28%), visiting attractions and sight seeing (both mentioned by 25%).
- The most common activities undertaken were general sightseeing (65%), low level walking (59%) and visiting attractions (51%) – the attractions visited by the highest proportions of visitors were Loch Morlich and Balmoral Castle, followed by Loch an Eilein and the Highland Wildlife Park.

Awareness and perceptions of the National Park

- The area's National Park status is well understood by visitors – 89% were aware of this.
- While awareness was very consistent with 2014, the reported importance of national park status had increased since the last survey – half said this was important in their decision to come to the Cairngorms (compared to 36% in 2014).
- National Park status was more important to those from Europe (70% said very or quite important) and the rest of the world (62%) than it was to Scotland (44%) and rUK visitors (50%).
- Perceptions of the national park were very positive, with high levels of agreement in relation to all of the statements about the park – and findings were broadly consistent with the previous survey. Strongest agreement was seen for the park being 'an area with plenty of attractions and outdoor activities' (57% agreed strongly).

Summary

Ratings and areas for improvement

- Most facilities rated highly, although the balance is towards 'good' rather than 'very good'. Public transport, mobile reception and Wi-Fi access were less well rated, although more now rate mobile reception and Wi-Fi access as 'very good' than in 2014. Ratings have declined for public transport and availability of public toilets, and to a lesser extent, provision of parking.
- Ratings of customer service were also very high, particularly for accommodation providers (56% rated as 'very good') – mean scores have improved for pubs, restaurants and cafes and activity providers, and more rate each aspect as 'very good' than they did in the previous.
- Rating of the overall experience in the Cairngorms area has increased significantly since 2014, from 8.87 to 9.08 out of 10.
- Very few suggestions for improvement were made – half said nothing needed improvement, and very small percentages mentioned any individual improvements. More public toilets and more/better signage were the two most common practical suggestions.

Next steps

- Fieldwork will continue over the autumn and winter months, with the survey finishing in April 2020.
- Final reporting will compare data to the 2014 full year results for the whole sample, and will also consider comparisons between the Cairngorms and Loch Lomond and the Trossachs where possible.

Appendices

Appendix: Sampling locations

Area	Sampling location	2019
Aviemore – 6%	Aviemore main street	6%
Glenmore – 14%	Rothiemurchus Car Park	3%
	Loch an Eilein	4%
	Loch Morlich/Glemore Centre & Café	3%
	Cairngorm Ski Centre – car park at base station	2%
	Glenmore Road End	2%
Atholl – 7%	Blair Atholl – village square	2%
	Blair Castle	1%
	House of Bruar	1%
	Killiecrankie	2%
Badenoch – 17%	Laggan – near Pottery	1%
	Highland Folk Museum, Newtonmore	3%
	Kingussie – main street	4%
	Kincraig Highland Wildlife Park	3%
	Laggan – Wolftrax	2%
	Dalwhinnie Distillery	2%
	Uath Lochans	1%
	Achlean Road end	<1%
Angus – 5%	Glen Esk Car Park	2%
	Glen Doll/Clova Car Park	3%

Area	Sampling location	2019
Strathspey – 16%	Landmark Centre, Carrbridge	6%
	Speyside Heather Centre, Skye of Curr	3%
	Osprey Centre Car Park, Loch Garten	4%
	Grantown on Spey – main street	3%
Moray – 12%	Glenlivet Distillery Car Park	3%
	Tomintoul – village centre	4%
	Lecht Ski Area	-
	Snow roads – Still	2%
	Snow roads – Watchers	3%
Aberdeenshire – 23%	Ballater – village centre/TIC	5%
	Loch Muick Car Park	2%
	Balmoral Car Park	3%
	Royal Lochnagar Distillery Car Park	1%
	Braemar – village centre	3%
	Linn of Dee Car Park	3%
	Glenshee	-
	Burn o'VAT Car Park, Dinnet	2%
	Glen Tanar Car Park	2%
	Strathdon	1%
	Snow roads – Connecting Contours	1%

Appendix: Detailed origin tables

Origin – All	2019
Scotland	44%
England	22%
Wales	1%
Northern Ireland	1%
Other UK e.g. Isle of Man	-
Germany	7%
France	4%
Netherlands	3%
Italy	1%
Spain	1%
Republic of Ireland	<1%
Other European country	5%
USA	5%
Australia	3%
Canada	2%
New Zealand	1%
Other country	1%
Base	**1,629**

Origin – Scotland	2019
Aberdeen / Aberdeenshire	24%
Fife / Dundee	15%
Highlands & Islands	15%
Edinburgh	14%
Glasgow / Greater Glasgow area	11%
Perthshire / Stirling / Falkirk	10%
Other Central belt	4%
Dumfries and Galloway / Borders	2%
Ayrshire	1%
Other	5%
Base	**711**

Origin – England	2019
South East	22%
South West	13%
London	13%
North West	13%
Yorkshire and the Humber	10%
North East	8%
East Midlands	8%
West Midlands	7%
East of England	6%
Other	1%
Base	**360**

Appendix: Follow up transport questions

Car type	2019
Fully electric car	1%
Hybrid	3%
No – not an electric car	97%
Don’t know/can’t remember	<1%
Base (all using a car to/within park)	**1,401**

Use of sleeper train	2019
Yes	13%
No	87%
Don’t know/can’t remember	-
Base (all using train to the park)	**47**

Preferred method of travel used	2019
Yes – preferred method	96%
No – prefer something else	4%
Don’t know/not sure	<1%
Base (all)	**1,679**

Preferred method of travel	2019
Car	21%
Public bus	31%
Train	16%
Cycle	16%
Walk	5%
Motorhome/campervan	7%
Taxi	-
Other	3%
Base (all not using preferred method)	**61**

Appendix: ‘Freedom campervanning’ data

Origin by type of campervanning	All	With facilities	Freedom
Scotland	39%	41%	32%
Rest of UK	33%	35%	29%
Europe	24%	19%	37%
Rest of world	4%	5%	2%
Base (all staying in campervans/motorhomes)	**123**	**88**	**41** ⚠

Hired/owned by type of campervanning	All	With facilities	Freedom
Hired	3%	5%	5%
Own campervan	97%	95%	95%
Base (all staying in campervans/motorhomes)	**119**	**88**	**39** ⚠

Definition of ‘hired’ based on those who mentioned campervan/motorhome as a means of transport WITHIN the Park but not TO the Park – NB difference in base sizes due to some small inconsistencies in responses between questions about transport and accommodation

Where people were staying by type of campervanning	All	With facilities	Freedom
Aviemore	32%	31%	37%
Braemar	29%	33%	21%
Tomintoul	24%	27%	21%
Ballater	22%	21%	21%
Grantown-on-Spey	10%	9%	9%
Blair Atholl	6%	2%	14%
Nethybridge	3%	4%	-
Newtonmore	3%	3%	2%
Kingussie	2%	3%	2%
Laggan	2%	1%	2%
Boat of Garten	2%	1%	2%
Carrbridge	1%	-	2%
Other location within the NP	13%	9%	19%
Base (all staying in campervans/motorhomes)	**125**	**90**	**43**

Appendix: Breakdown of TVL data

Overseas visitors more likely to say tax would have no impact; Scotland/rUK visitors more likely to say they were unsure

Impact of tourist tax – by origin	All	Scotland	rUK	Europe	Rest of world
No impact – would not have changed plans	85%	80%	79%	91%	95%
Would have stayed for fewer nights	2%	1%	3%	1%	1%
Would have booked cheaper accommodation	1%	2%	1%	1%	-
Would have booked accommodation outside the area covered by the tourist tax	3%	5%	2%	2%	1%
Would have chosen another destination for my trip	1%	2%	2%	<1%	-
Other	3%	5%	4%	2%	2%
Unsure	6%	8%	9%	4%	2%
Base (all staying in Park in paid for accommodation)	**886**	**293**	**245**	**218**	**124**

Please note: Breakdown by area of the park and accommodation type not included due to very small base sizes for individual sub-groups

Technical Appendix

Quantitative

- The data was collected by CAPI interview.
- The target group for this research study was visitors to the national park (including residents on a leisure trip).
- The target sample size was 1,620, and the final achieved sample size was 1,679.
- Fieldwork was undertaken between May and September 2019.
- Respondents were selected using probability random sampling, where interviewers selected every n^{th} person passing their pre-selected sampling point.
- In total, 14 interviewers worked on data collection.
- Each interviewer's work is validated as per the requirements of the international standard ISO 20252. Validation was achieved by re-contacting (by email or telephone) a minimum of 10% of the sample to check profiling details and to re-ask key questions from the survey. Where email/telephone details were not available re-contact may have been made by post. All interviewers working on the study were subject to validation of their work.
- The sample size of 1,679 provides a dataset with an approximate margin of error of between ±0.48% and ±2.39%, calculated at the 95% confidence level (market research industry standard).
- Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity. For CAPI questionnaires these checks include:
  - Responses are checked to ensure that interviewer and location are identifiable. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact interviewers to check.
  - Using our analysis package SNAP, data received via over-the-air synchronisation is imported from our dedicated server.
- A computer edit of the data carried out prior to analysis involves both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
- Where 'other' type questions are used, the responses to these are checked against the parent question for possible up-coding.
- A SNAP programme set up with the aim of providing the client with useable and comprehensive data. Crossbreaks are discussed with the client in order to ensure that all information needs are met.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.

Thank you

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