

Cairngorms Business Barometer 2009/2010

Final Summary Report

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Introduction

Insight on performance and perceptions amongst tourism related businesses is of crucial importance for those charged with the responsibility of developing the tourism potential within the Cairngorms National Park area.

The visitor economy undergoes constant change as market forces together with a host of other aspects; including financial, environmental and seasonal factors, all essentially influence people's decisions to undertake leisure visits and/or activities, so an ongoing measure of performance can provide vital insight to help the destination keep abreast of the current the situation.

The information is of strategic and operational importance to tourism related businesses as well as tourism promotion organisations and is an important gauge to assess and better understand threats and opportunities which may arise from social, economic and political changes within the visitor market.

In summer 2009 Lynn Jones Research (LJR) was approached by the Cairngorms Business Partnership (CBP) to develop the existing business barometer that had been undertaken by Aviemore and the Cairngorms Destination Management Ltd. (ACDMO) in the Badenoch and Strathspey area of the Cairngorms National Park and set-up a park-wide business barometer. In September 2009 an approach incorporating a range of measurement criteria was agreed with Visitrac¹ the delivery mechanism.

After each of the 4 subsequent survey periods (July to September 2009, October to December 2009, January to March 2010 and April to June 2010) LJR produced a summary report highlighting the salient points from each quarter.

This end of year report provides an overview of the Cairngorms Business Barometer 2009/2010 that will help paint a picture of the overall performance of the tourism sector in the National Park during this period. It has been compiled to act as a working document and reference point for CBP to help advise strategic planning with regard to marketing, PR, visitor management or other ongoing developmental activities not just now at the time of publication, but throughout the year. We would encourage the reader to take some time to look through the index at the beginning of this report which highlights the areas of information covered.

Methodology

Pre autumn 2009 the business barometer in the Badenoch and Strathspey area of the park was undertaken by ACDMO themselves using *SurveyMonkey*. The approach worked well to gather baseline data, however there was a desire to move to a totally independent framework to be managed and analysed by an independent research company in order to provide a more rigorous basis to collect the business trend information.

Following an assessment of the questions in the current survey a draft Visitrac questionnaire was created and by the end of September 2010 the final version of the Cairngorms Business Barometer was agreed by CBP. LJR were then able to make four separate 'copies' of the finalised questionnaire, one for each included sub-area of the National Park, namely, Aviemore, Royal Deeside, Glenlivet and Angus Glens.

¹ LJR's wholly owned and operated online survey system

Surveys were sent out each quarter and, in total, LJR sent out some 16 separate online Visitrac surveys to businesses throughout the area during the project period.

CBP supplied LJR with their business membership database which was updated in advance of each quarterly period. The database consisted of those businesses held on a central membership list as part of the Cairngorms Chamber of Commerce as well as members of the sub-area destination management organisations (DMOs).

LJR issued businesses with the survey at the start of the proceeding month following a quarterly period (e.g. 1st October 2009). LJR also sent out an additional reminder email link to businesses and/or communication reminding them to fill in the survey came directly from CBP to businesses in order to augment the response rate. Each quarter businesses were given between two to three weeks to respond before surveys were closed and analysis undertaken on the data.

Sample

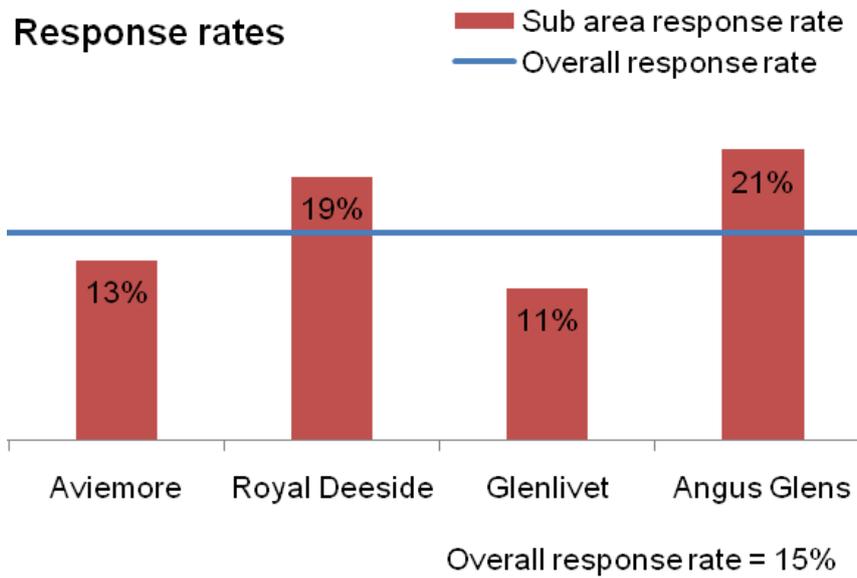
The sampling population was tourism related businesses spanning the boundaries of the four sub-areas of the Cairngorms National Park. However, as the project approached the half way stage it was recognised that there were also a small number of businesses whose main activity was perhaps not chiefly tourism related and as a result small adjustments were made to the surveys to accommodate these other businesses.

Below is the breakdown of responses compared to the potential base for the surveys in each sub area and quarterly time period during the project. The profile of businesses responding to the surveys is outlined in more detail in the key findings following this section.

Sub Area & Period	Business Emails	Business Emails (% of Period Base)	Survey Responses	Response Rate (%)
Aviemore Q3 2009	366	73%	79	22%
Aviemore Q4 2009	367	73%	53	14%
Aviemore Q1 2010	368	73%	45	12%
Aviemore Q2 2010	632	75%	50	8%
Aviemore (Total)	1733	74%	227	13%
Royal Deeside Q3 2009	102	20%	31	30%
Royal Deeside Q4 2009	103	20%	18	17%
Royal Deeside Q1 2010	103	20%	25	24%
Royal Deeside Q2 2010	145	17%	14	10%
Royal Deeside (Total)	453	19%	88	19%
Glenlivet Q3 2009	16	3%	3	19%
Glenlivet Q4 2009	17	3%	3	18%
Glenlivet Q1 2010	16	3%	2	13%
Glenlivet Q2 2010	59	7%	4	7%
Glenlivet (Total)	108	5%	12	11%
Angus Glens Q3 2009	14	3%	4	29%
Angus Glens Q4 2009	19	4%	4	21%
Angus Glens Q1 2010	19	4%	4	21%
Angus Glens Q2 2010	4	<0.5%	0	0%
Angus Glens (Total)	56	2%	12	21%
CBB Total	2350	100%	339	15%

The table above gives the survey response rate from businesses in each sub area of the Park as well as in overall terms. Take-up of the survey was fairly consistent across all areas

of the Park with Aviemore based businesses registering a slightly lower response rate than compared to Royal Deeside businesses as illustrated below.



The overall sample for analysis is 339² completed survey responses from businesses, some of whom replied consistently to each quarterly survey, and includes responses from businesses spanning the key tourism sectors across all four sub areas of the National Park.

² Note that sections of analysis within the report are based on smaller sub-samples of responses.

Summary of key findings

This section outlines key findings from the research which gathered trend and performance data from businesses across the Cairngorms National Park after the following quarterly periods: July to September 2009 (Q3 2009); October to December 2009 (Q4 2009); January to March 2010 (Q1 2010) and April to June 2010 (Q2 2010).

At intervals throughout the summary we have referred to key findings observed from cross-analysis of the data by three aspects, namely; quarterly time period, sub-area of the Park and business sector. However, small sample sizes limit our ability to do this universally across all responses part of the cross-analysis. For example; whilst included in the overall total, the relatively low number of survey responses from Glenlivet and Angus Glens have been ignored in the comparisons made of responses by sub-area of the Park.

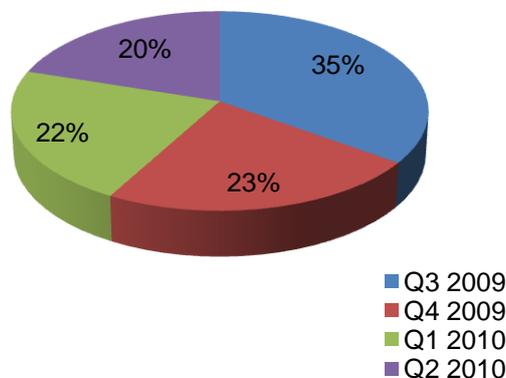
A detailed tabular report containing results to all questions asked in the survey follows this summary.

Sample

Quarter

The Q3 2009 barometer elicited a proportionally greater response than the other quarterly periods surveyed and accounts for 35% of the overall sample of responses achieved during the year period. Meanwhile, the Q2 2010 barometer achieved the lowest response and accounts for 20% of the overall sample.

Sample - Quarter

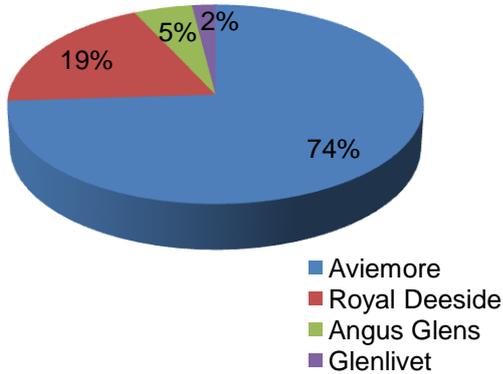


Sub-area

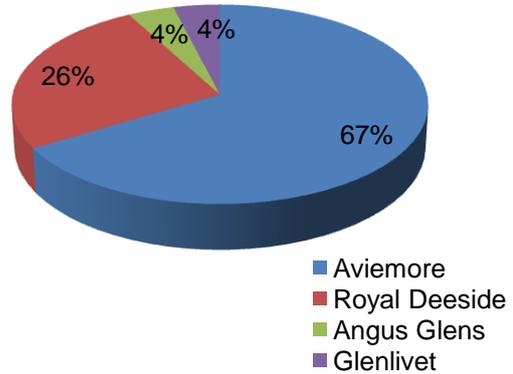
Fairly representative of the configuration of the overall database of businesses used for the project, two-thirds of the overall sample was Aviemore based businesses and amongst Aviemore businesses there was a higher representation of activity operators and attractions than elsewhere in the Park.

Making up 19% of the sampling population, businesses from Royal Deeside accounted for 26% of responses during the year although this was recognisably higher at 33% in Q1 2010.

Database of businesses



Survey responses



Business profile

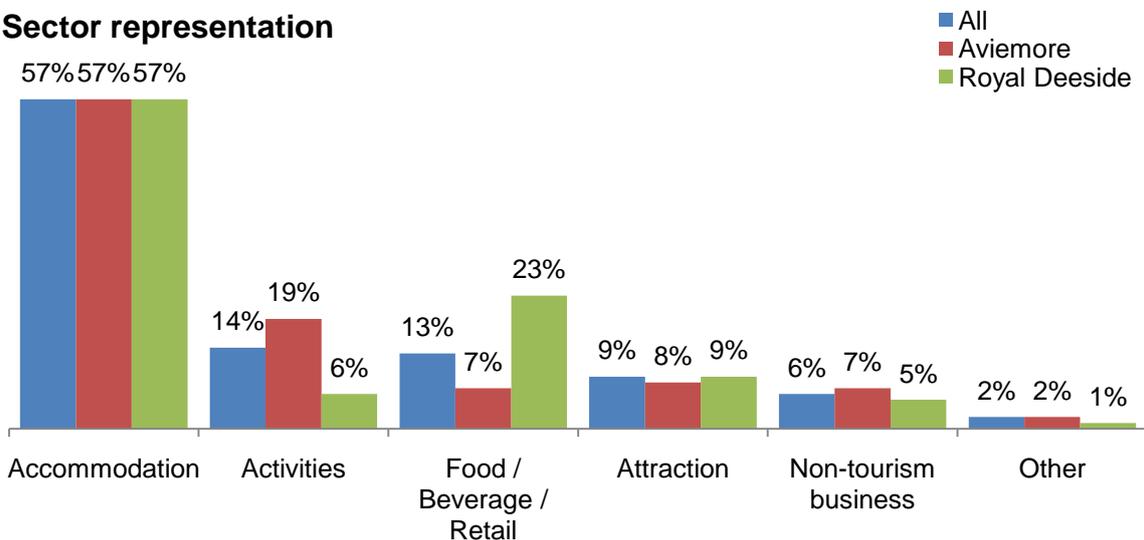
Sector

More accommodation providers responded to the quarterly barometers than any other single tourism business group making up 57% of responses during the year. The accommodation providers' responses were proportionally evenly distributed within the larger samples of Aviemore and Royal Deeside.

Nearly three-quarters of accommodation providers were operating relatively small Bed & Breakfast/guest house or self-catering businesses whilst hotel participation accounted for 14% of the sample and hostels 11% of the sample.

Activity operators (14%), food/beverage/retail businesses (13%) and attractions (9%) were the other sectors of significance.

Sector representation

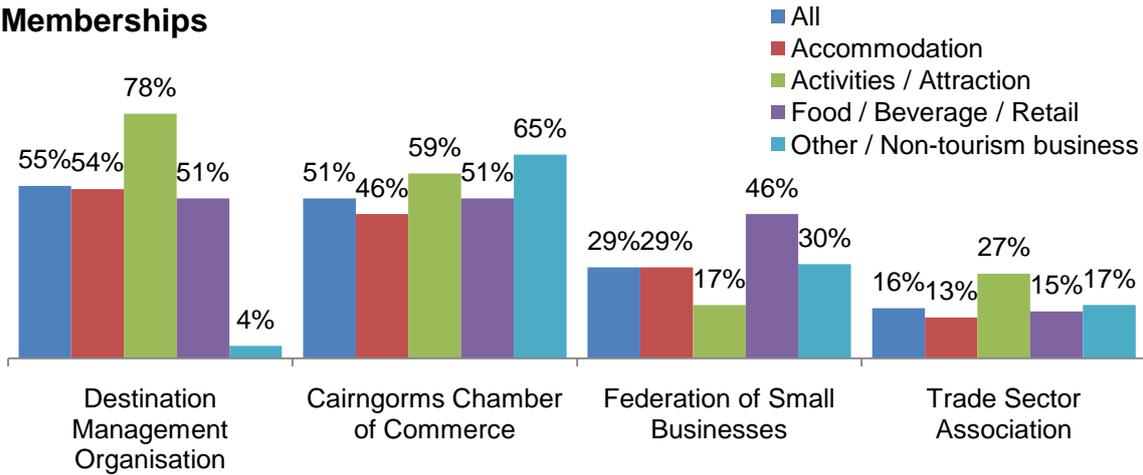


Memberships

Around 10% of businesses indicated they were not members of any of the organisations listed.

The chart below shows the breakdown of the membership organisations cited by 15% or more of businesses and illustrates the differences of membership take-up by business sector.

Memberships



Customer profile

Origin

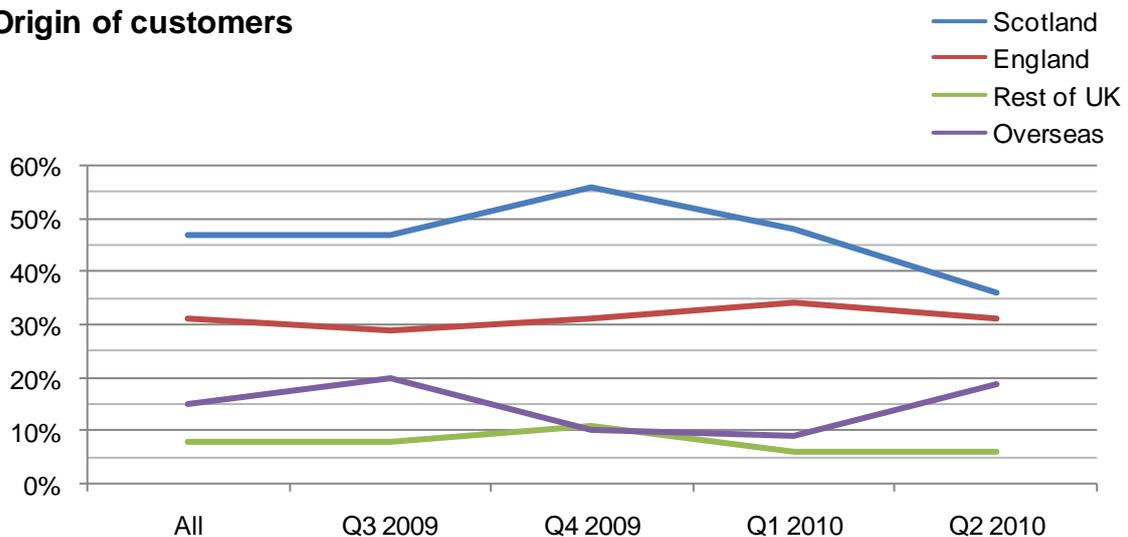
To help monitor the profile of visitors to the Park during the course of the year businesses were asked to give a best estimate breakdown of their customers by origin each quarter. Businesses indicated that the Scottish visitor market was considerable and accounted for approximately a half of their customer base and was seen to be most significant during Q4 2009.

Visitors from England made up just over 30% of the customer mix with a sizeable majority (63%) coming from the North.

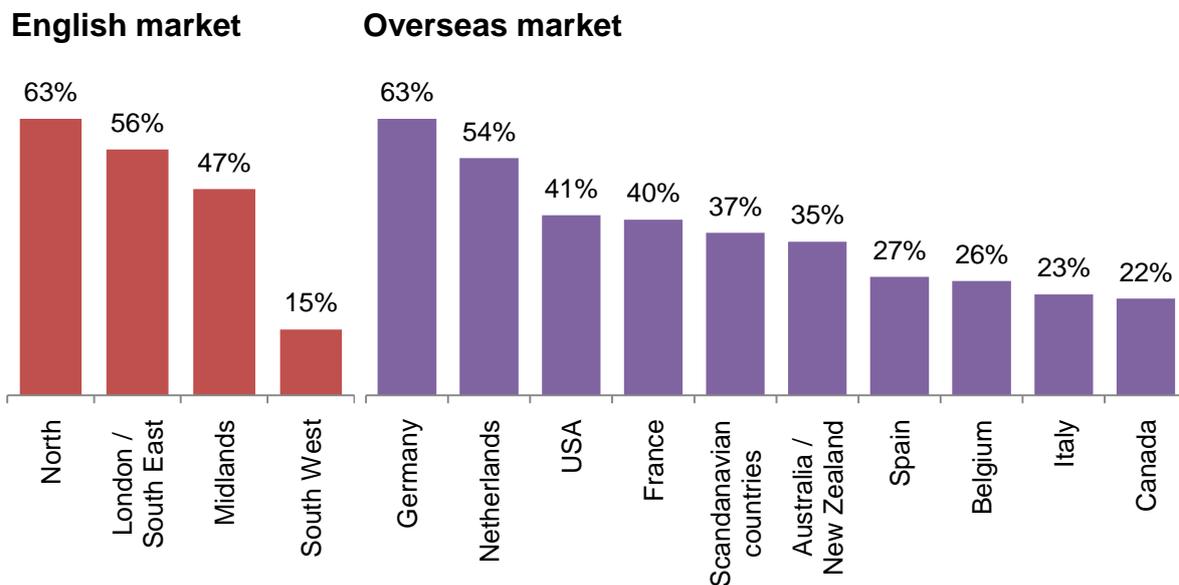
What might be seen as an overrepresentation in terms of the relative size of the population, customers from Wales and Northern Ireland made up on average 8% of the overall market.

The remainder, some 15% of the market was made up of overseas visitors although seasonal differences were quite stark as the market shifted from 10% in the autumn/winter seasons to 20% in the spring/summer seasons.

Origin of customers



The key overseas market was Germany cited by 63% of the businesses indicating they traded with overseas visitors, followed by Netherlands (54%), United States (41%) and France (40%).



Type

Businesses were asked to give an indication, insofar as they were able to, of their mix of first and repeat customers.

Suggesting that first time customers appear to have outnumbered repeat customers within the Park, 60% of businesses indicated that first time customers accounted for 50% or more of their customer mix. This finding also highlights the importance of the need to continuously market the area in order to attract new audiences. The incidence of first time customers was highest during Q3 2009 which includes the 'peak' summer season months.

The incidence of first time customers was highest amongst accommodation businesses with first time customers accounting for just over 60% of their customers. Meanwhile, amongst retail and catering businesses first time customers accounted for less than 40% of their customer mix.

Business levels

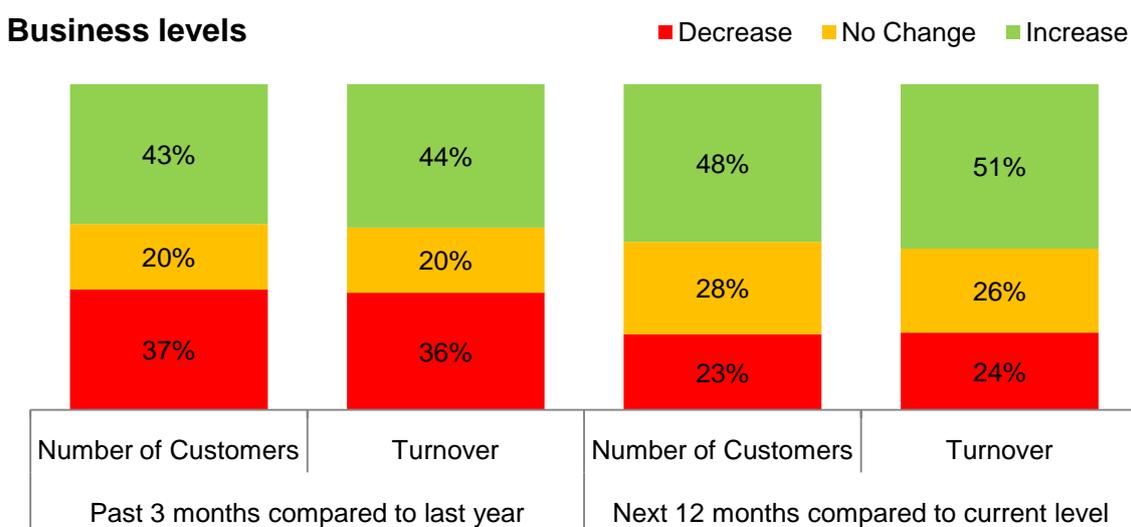
Customers and turnover

To monitor any shifts in business activity from one quarter to the next, businesses were asked to indicate how their performance last quarter compared to the same quarter a year ago, in terms of customer numbers and turnover, and were then asked what their forecasts for the year ahead were in terms of anticipated customer numbers and turnover.

Overall, businesses were more likely to indicate that customer numbers had increased rather than decreased compared to the same quarter a year ago. However, ignoring the buoyant Q3 2009 data where comparisons were made against Q3 2008 (a period that saw the market in a depressed state in the wake of an impending international banking crisis), it is apparent that businesses have had a tough time with an indication of reduced customer numbers. The disruption caused by the prolonged cold weather during Q1 2010 is also apparent as 53% of businesses reported falls in customer numbers compared to Q1 2009.

A similar picture is noted in terms of turnover, with businesses by-and-large reporting an increase from the year previous, driven largely by significant growth in Q3 2009. However, the contrast between a positive picture in Q3 2009 and a less positive picture in the other quarters appears less marked suggesting turnover growth has perhaps dampened the affect of declining customer numbers seen towards the end of 2009 and into 2010.

There is little robust evidence to suggest that any one sub-area of the Park has fared better or worse than others during the year. However, there is a suggestion that activity operators and attractions registered falling customer numbers and turnover more so than other business types, this is despite the excellent snowsports conditions during much of Q1 and Q2 2010 although the severe winter conditions did disrupt 'normal' trading significantly for all types of businesses over extended periods at the start of the year.



Looking forward 12 months businesses were optimistic that customers were likely to increase from their present numbers and this was most pronounced at the end of Q3 2009 perhaps highlighting that the months of October and November are particularly quiet periods in the area. Aviemore businesses demonstrated a slightly more optimistic outlook than businesses from Royal Deeside and, surprisingly, despite noting declining customer numbers, attractions and activity operators forecasted more favourable business conditions than other types of businesses.

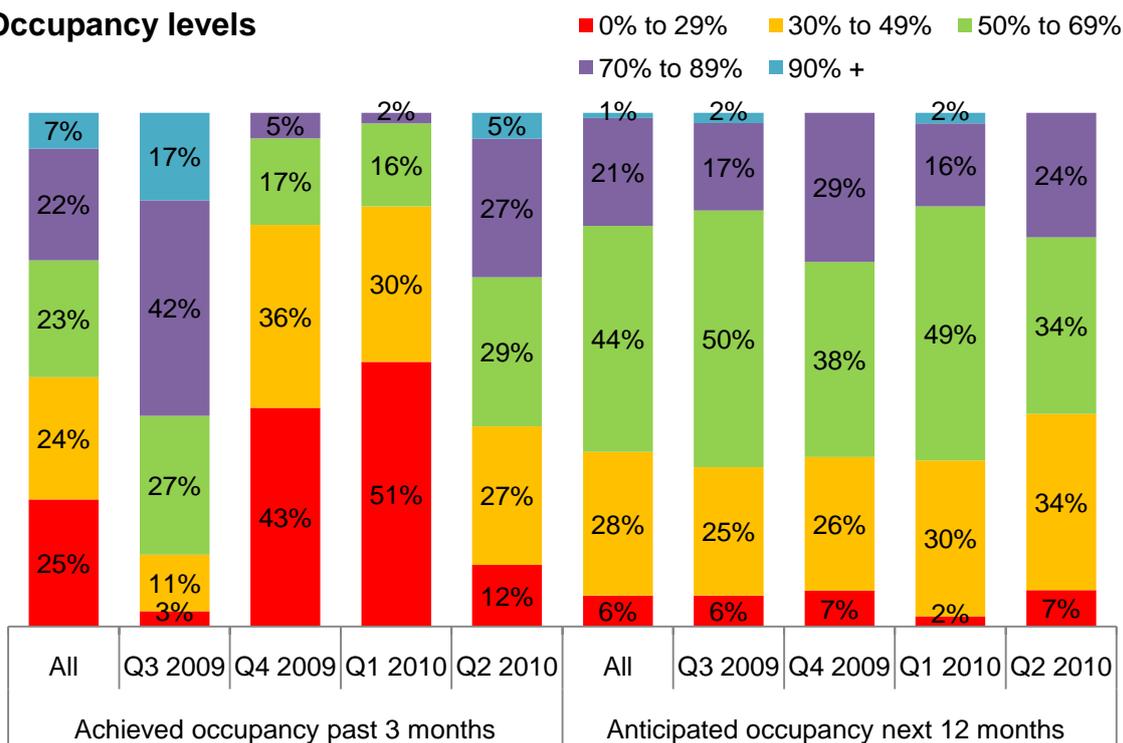
Turnover forecasts were similar to customer number expectations with businesses expecting increases over the coming 12 months from their present levels. The time that most optimism was noted by businesses regarding future growth was at the end of Q3 2009.

Occupancy

Accommodation providers, representing a significant proportion (57%) of the overall sample, were asked each quarter about their occupancy performance. Achieved occupancy fluctuated a great deal during the quarters and was highest during Q3 2009 with nearly 60% of businesses registering occupancy of 70% or more during the period. Meanwhile, Q1 2010 proved a much more challenging time for accommodation providers with fewer than 5% achieving occupancy of 70% or more during the period.

Accommodation providers were also asked for their view on anticipated levels of demand in the next 12 months and they tended to paint a fairly conservative picture. As to be expected, this was also heavily influenced by the timing of the research and the end of Q3 2009 was again identified as a time when business performance prospects were most optimistic.

Occupancy levels



Levels of investment

Investment is a crucial element underpinning successful business development which, dependent on the economic outlook, may be subject to significant change over time. To monitor any change, businesses were asked each quarter to indicate their level of investment compared to the previous year in three 'core' areas – staff training, marketing/promotion and buildings/infrastructure.

Staff training (past 3 months)

Staff training registered the least significant changes in comparison to the previous year with around 70% of relevant businesses retaining their existing levels of staff training from one year to the next. However, amongst those businesses reporting changes in staff training the likelihood was they were allocating more rather less resources to this activity.

Marketing and promotion (past 3 months)

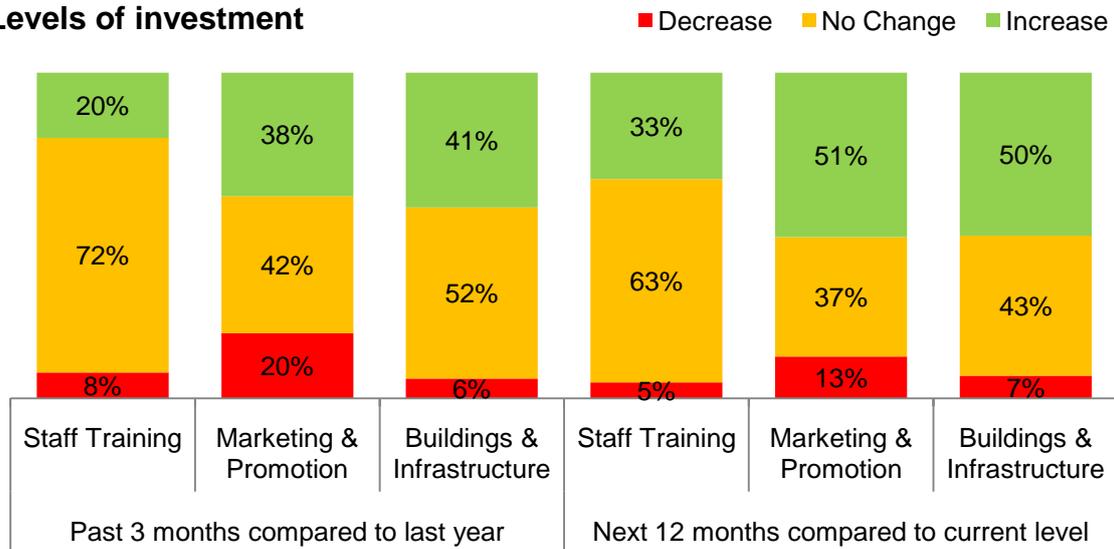
Marketing and promotion investment was subject to the greatest change compared to the previous year and, like staff training, demonstrated an increasing trend with 80% of businesses retaining or increasing their level of investment and, in particular, 38% of businesses increasing their level of marketing and promotion expenditure.

Buildings and infrastructure (past 3 months)

A fairly positive picture also emerged with regards to buildings and infrastructure investment which is arguably a greater expense and disruption to businesses than staff training and marketing and promotion. Whilst around 50% of businesses across the Park demonstrated comparable levels of investment to the previous year, over 40% indicated they had

increased their level of investment on buildings and infrastructure and the incidence of this was most pronounced amongst accommodation providers (49%).

Levels of investment



Staff training (next 12 months)

In terms of anticipated levels of investment over the coming 12 months, staff training was again cited as the investment aspect least likely to change with 63% of businesses unlikely to increase or reduce investment from its current level. The vast majority of the remaining businesses indicated levels of staff training would increase rather than decrease over the coming year and this was particularly evident amongst activity and attraction businesses.

Marketing and promotion (next 12 months)

More 'movement' in terms in marketing and promotion investment was observed. However, it seems likely businesses will invest more rather than less looking ahead although the trend over the period, looking at each quarter from Q3 2009 to Q2 2010, appears to demonstrate a gradual decline in marketing and promotion expenditure.

Buildings and infrastructure (next 12 months)

Overall, a half of businesses planned to increase their buildings and infrastructure investment although in the most recent quarter, Q2 2010, the figure was 42%. Activity operators and attractions appear more 'hamstrung' than other types of businesses in developing their buildings and infrastructure as only 40% during the period proposed increased levels of investment compared to 53% amongst accommodation providers and 51% amongst retail and catering businesses.

Costs

Businesses were then asked to consider changes in staff, supplier and administration costs compared to last year.

Staff costs (last 3 months)

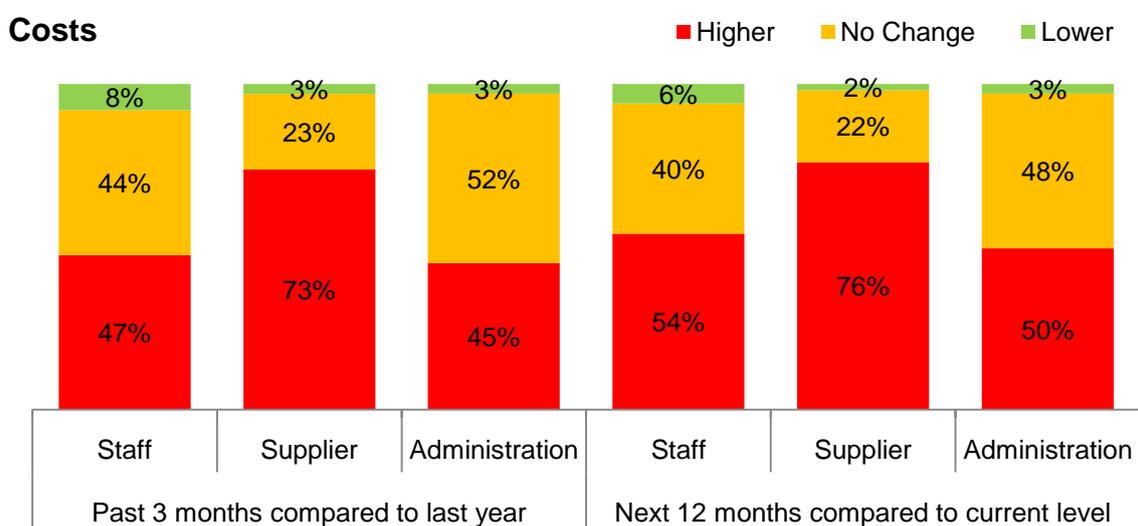
Staff costs were relatively consistent with last year although 47% of businesses did indicate costs had risen compared to a year previously. Increasing staff costs appeared to be a greater issue amongst Aviemore based businesses. Also, amongst retail and catering businesses staff costs showed above average increases compared to a year previously (64%).

Supplier costs (last 3 months)

A key issue for concern, repeated by businesses in the quarterly surveys was increasing supplier costs. Nearly three-quarters of businesses cited increases in this cost base compared to the same quarterly period a year earlier. Those trades more dependent on supplier goods rather than services like accommodation providers and food, beverage and retail outlets were more likely than attractions and activity operators to report these increased changes.

Administration costs (last 3 months)

Administration costs were seen to be the most stable cost base with just over 50% indicating they had remained roughly the same compared to a year ago which it is reasonably assumed is linked to high levels of self-employed/single person businesses within the area. Food, beverage and retail businesses, again, however indicated above average rises in costs (69%).



Supplier costs (next 12 months)

Supplier costs were forecasted to increase over the coming 12 months by 76% of businesses – a trend which was most pronounced in Q2 2010 (80%). Again, the accommodation along with food, beverage and retail sectors appeared to be facing a comparatively greater challenge over supplier costs than other business types.

Staff and administration costs (next 12 months)

Increased staff and administration costs in the next 12 months were cited by around half of businesses sampled during the year period although quarterly trends did differ quite significantly on these aspects. Retail and catering businesses continued to report a comparatively greater ‘squeeze’ in terms of administration and, in particular, staff costs compared to businesses operating in other sectors.

Barriers to growth

After having reviewed their general business performance and changes in terms of their level of investment and operating costs, businesses were then asked to consider the extent to which they may or may not have felt a number of issues were barriers to their profitable growth.

Using a rating scale from 1 to 10 with 10 being the greatest/most restrictive barrier to growth, businesses rated seven separate issues. T

Bureaucracy/legislation was perceived as being the greatest barrier to growth, albeit scoring not too badly at 6.60 out of 10. Food, beverage and retail outlets appear to feel most affected by this issue attributing an above average score of 7.52. Businesses in Royal Deeside as opposed to Aviemore also attributed higher scores in relation to bureaucracy/legislation so perhaps it is proving comparatively more difficult for businesses based in Royal Deeside to trade in an environment of changing legislation.

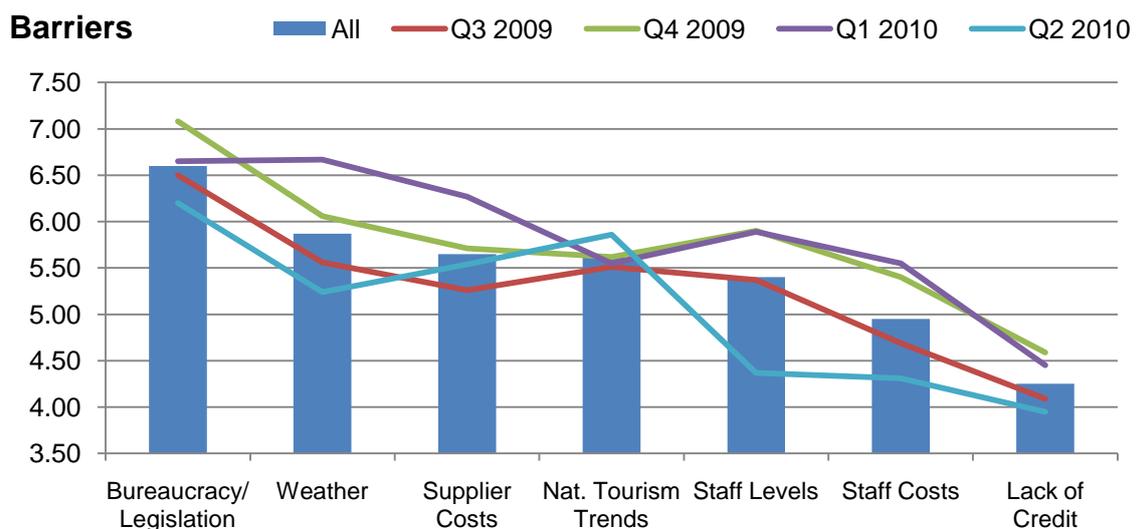
Influenced adversely by the atypical bad winter, weather was considered the second greatest barrier to growth rated at 5.87 out of 10 and rated at 6.67 in Q1 2010. In the more rural areas of the Park weather was considered a greater barrier as Aviemore based businesses regularly rated this aspect lower than businesses from elsewhere across the Park. As to be expected activity businesses and attractions, many of which are outdoor based, were also more likely than other businesses to perceive bad weather as a threat.

Supplier costs – a topic of more detailed discussion above – were considered the third greatest barrier to growth rated at 5.65 out of 10 and, as observed above, are proving to be a greater obstacle amongst accommodation providers and, in particular, food, beverage and retail operators.

National tourism trends were rated as the fourth biggest threat for businesses across the Park (5.61) a trend itself which was fairly constant during the year. Shops and eating and drinking establishments were most wary of trends in tourism attributing an average score of 6.16.

Perhaps surprisingly, staff levels (5.40) were considered a greater barrier to growth than staff costs (4.95) which may highlight a significant skills shortage across the area.

Finally, the lack of available credit was rated as the lowest perceived barrier at 4.25 out of 10.

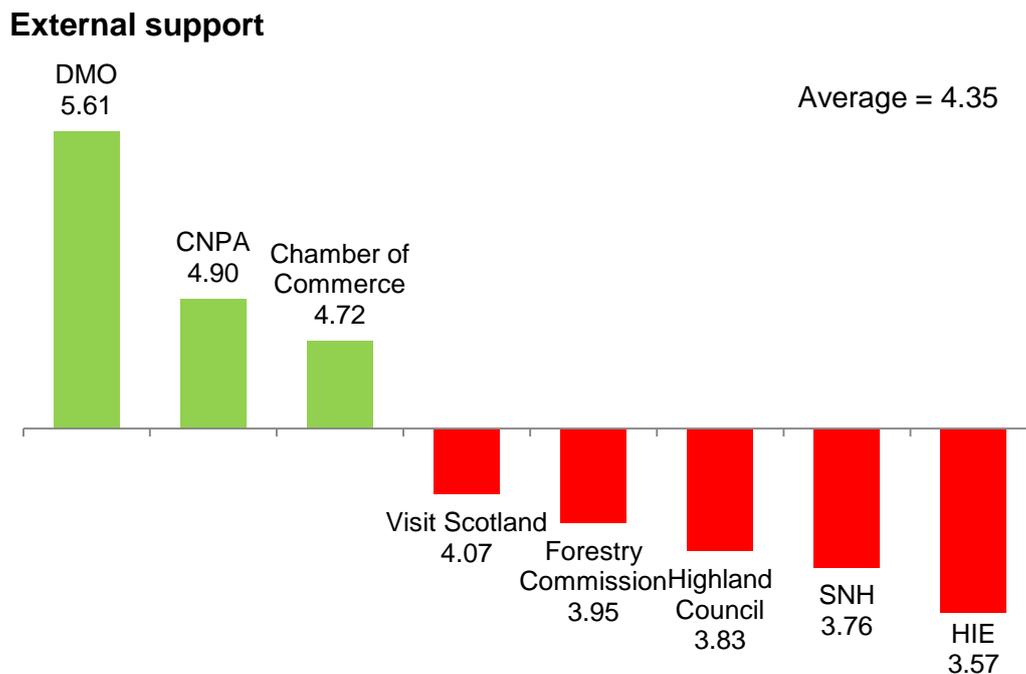


Businesses were also asked by way of a free-text question if there were any other issues which they felt posed a threat to their profitability. A number of wide-ranging comments were made, most regularly referencing taxation (28%), and competition (16%).

External support

Respondents were asked to evaluate the contribution made by the main public and private sector led organisations within the Park in assisting them with their business using a 1 to 10 rating scale with 10 being the greatest positive contribution.

The chart below illustrates how the contribution of each of the 8 organisations was rated compared to the average level of contribution during the year which was 4.35.



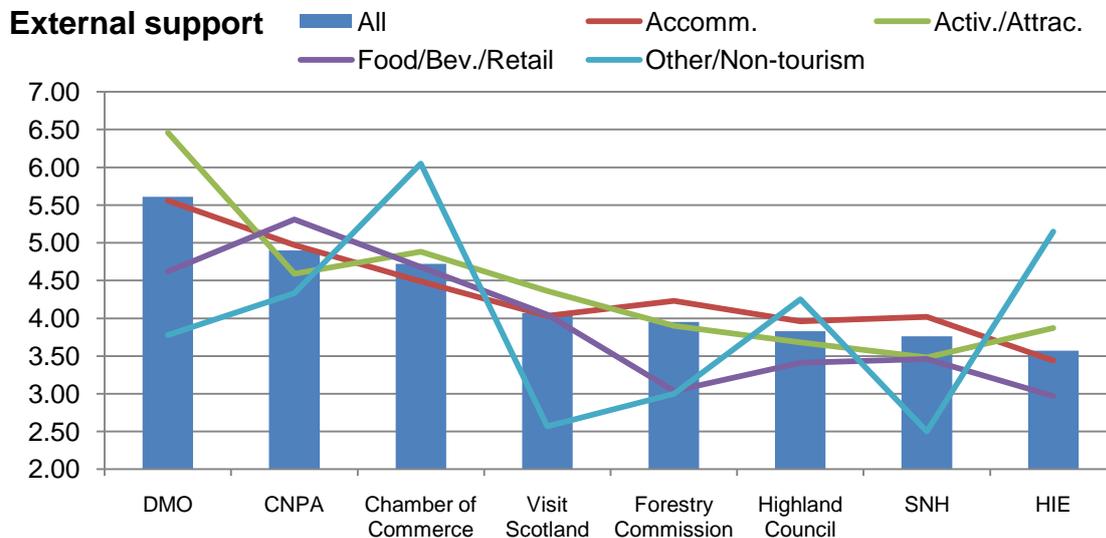
Fairly 'passive' scores were attributed by businesses to this section of the surveys with the highest positive contribution being credited to DMOs (5.61) and by those, in particular, in the Glenlivet (7.00) and Aviemore (5.84) sub-areas of the Park. Interestingly, activity businesses and attractions were more likely than other business types to recognise a positive contribution by DMOs whilst the converse was true for food, beverage and retail businesses.

Rated 4.90 out of 10 in terms of their contribution to assist businesses Cairngorms National Park Authority (CNPA) was the second most positively perceived organisation. CNPA clearly plays an active role in dealings with businesses across the Park and this was recognised with only 15% of businesses indicating that the organisation had not contributed (positively or negatively) to the running of their business – a figure that was lower only for VisitScotland at 12%.

Cairngorms Chamber of Commerce was third in overall terms out of the list of eight organisations (4.72) although some 20% of businesses indicated that the Chamber had not contributed to the way they ran their business.

Slightly below the average in terms of their overall level of contribution amongst the eight organisations, VisitScotland was rated fourth at 4.07 out of 10 although over the period their perceived contribution increased progressively from 3.87 in Q3 2009 to 4.35 in Q2 2010. It appears VisitScotland has also done more to raise the profile of businesses in Royal Deeside than in Aviemore with a differential noted between the two areas (3.89 versus 4.60).

The four remaining organisations were all rated below 4 out of 10 with the conservation organisations Forestry Commission Scotland and Scottish Natural Heritage rated at 3.95 and 3.76, respectively, Highland Council rated at 3.83 and, finally, the enterprise organisation, Highlands and Islands Enterprise, rated at 3.57.



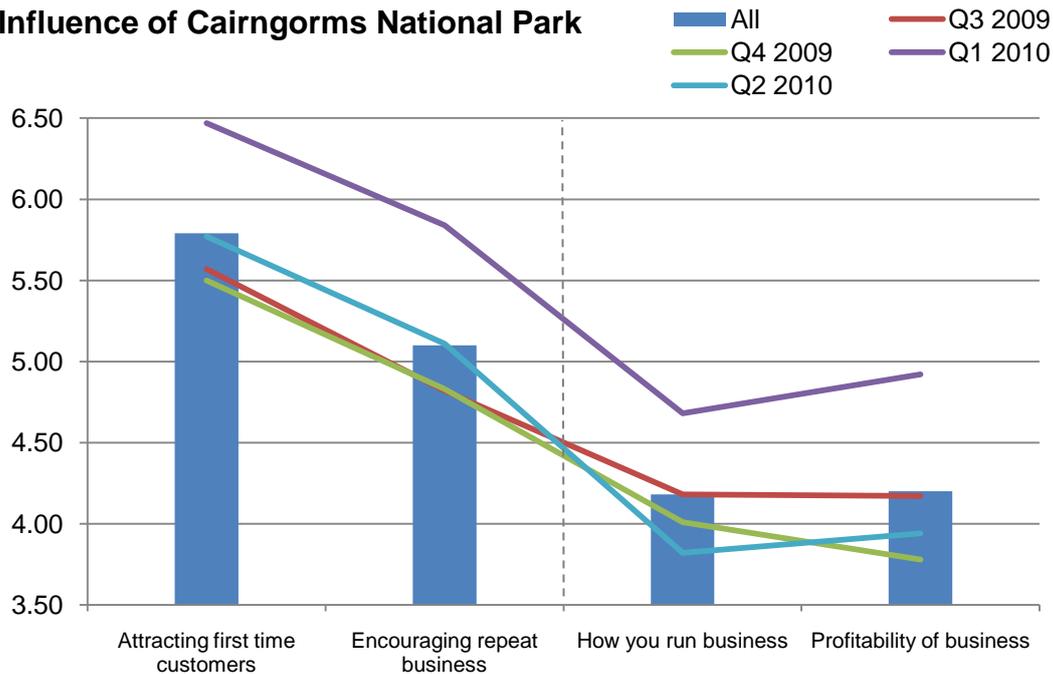
Influence of Cairngorms National Park

The Cairngorms National Park is a natural physical asset in the Highlands which contributes to both the decision making process to come to the area as well as the overall visit experience. To assess the role the Park has on day-to-day trading businesses were asked four identical questions each quarter.

In terms of attracting customers, businesses recognised that the Park played a role in bringing new and repeat customers through their doors. The Park was seen to have a greater effect in attracting new, first time rather than repeat customers with businesses attributing an average level of influence score of 5.79 out of 10, where 1 was 'not at all an influence' and 10 was 'very much an influence'.

National Park status appears to be more important in driving business to the area in the winter season as the level of influence attributed to attracting first and repeat customers was higher than in any other quarter during Q1 2010. Aviemore businesses demonstrated a greater reliance on the Park to generate first time business than those from Royal Deeside as too did accommodation providers compared to those operating in the other sectors. A similar picture was apparent in terms of the role the Park plays in driving repeat custom although there appears to be little distinction between Aviemore and Royal Deeside businesses in this aspect.

Influence of Cairngorms National Park



The influence of the National Park in terms of business operations and profitability was less pronounced compared to the Park's role in attracting customers. The overall level of influence the Park has on how businesses are actually run was low at 4.18 out of 10 although this was slightly higher at 4.46 amongst accommodation businesses. A similar score was given in relation to profitability (4.20) with the slight majority of businesses indicating the National Park status had a low overall influence – below 5 out of 10 – on their profitability. This was however slightly higher during Q1 2010 indicating businesses were more reliant on the National Park profile in the winter season.

Business confidence

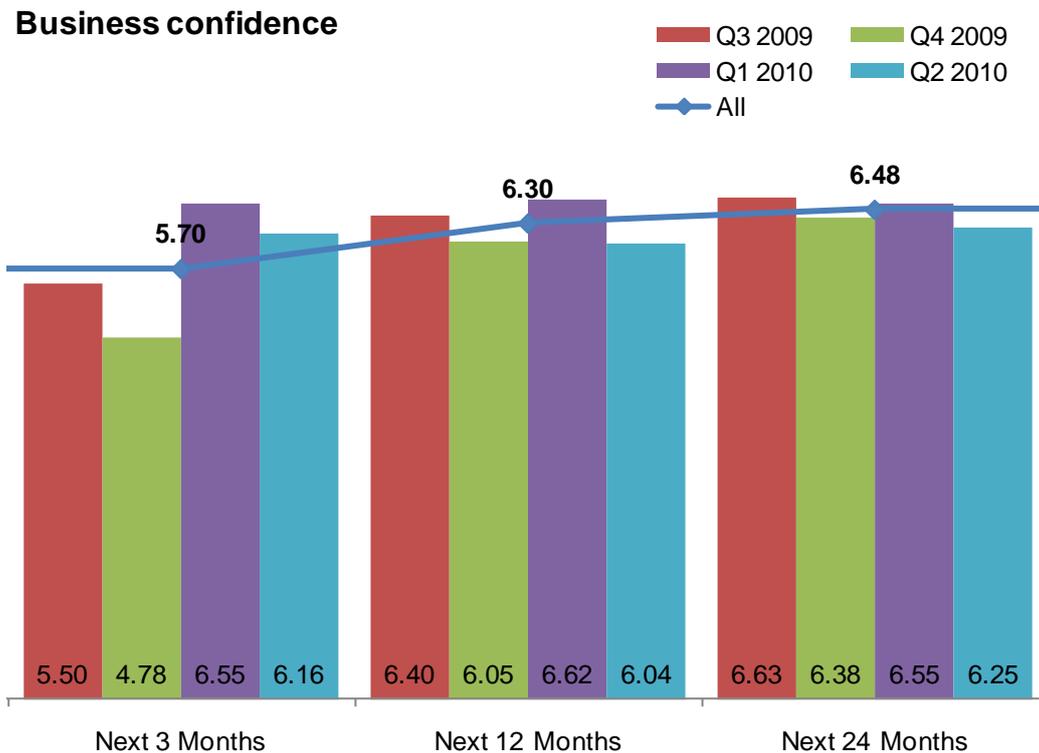
To help establish a picture of overall levels of business confidence respondents were asked to rate confidence levels in the short (next 3 months), medium (next 12 months) and long term (next 24 months).

Overall businesses demonstrated a tendency to be less optimistic in the immediate short term and more optimistic in the longer term. Short term business confidence during the project was 5.70 out of 10, where 1 was 'very poor' and 10 was 'very good'. Seasonality, however, played a role during the quarters with confidence peaking in the short term at 6.55 in Q2 2010 reflecting the expectation of a comparatively busier peak summer season (July to September). Aviemore businesses were most confident in the short term compared to businesses elsewhere despite still expressing a relatively reserved level of optimism for the next 3 months (5.84).

Looking ahead over the coming 12 months, businesses were more upbeat, attributing an overall business confidence score of 6.30 out of 10 with, again, seasonal fluctuations apparent during each quarter. Aviemore businesses were again slightly more confident regarding their performance over the next year than other businesses as too were accommodation providers.

When asked for a view on the next 2 years confidence was at its highest at 6.48 out of 10 and less fluctuation was observed each quarter. However, a downward trend may be

apparent in longer prospects as after Q3 2009 confidence fell two out of the three remaining quarters from 6.63 to 6.25.



Conclusion

The park-wide Cairngorms Business Barometer has successfully managed to canvas opinion from a broad sample of business across the Park each quarter on crucial business trend information. Through attractively set-out quarterly summary reports this information has been fed back to the business community as well as to those whose mandate it is to promote tourism within the area.

The trends observed each quarter and, indeed, each year as have been outlined and summarised in this report provide significant insight into the continually evolving nature of the tourism sector within the National Park. Regular monitoring and measuring through the barometer helps to identify changes which may be in response to the economic climate and/or other issues affecting the industry or changes which may be more deep seated within the industry – either way it provides information which will help shape the strategy for continued development for individual businesses as well as for the Cairngorms area as a whole.

During the period from July 2009 to June 2010 there have been a significant number of challenges and threats as well as opportunities for tourism business growth. It has been, one could say, an extremely busy 12-month period with the unprecedented cold-snap at the start of the year, the World Cup, the buzz of an 'election year' along with improving macro-economic factors all interacting alongside a 'global economic crisis environment'. However, even in this volatile context, the overall picture across the Cairngorms appears to be that of conservative growth and progression. Businesses are demonstrating generally a devotion to their products and services through increased investment which will help to make them more competitive in the wider market. Seasonality it appears is a big issue with shifts regularly observed quarter-to-quarter so steps taken to bridge these gaps in demand over the

calendar year will help to give businesses a sound footing and should result in a more fluid delivery of service and quality.

Operating costs, for any business in any part of the world, can be of great concern and this holds true across the Cairngorms with supplier costs, in particular, an aspect which in the light of today's trading environment has demonstrated above average increases year-on-year. Increasing costs that will therefore either eat into business profits or be passed on to visitors with possibly less money in their pocket. In the greater scale of things, however, this does not appear to be the single greatest barrier to business growth, this it seems is bureaucracy and legislation which is perhaps a greater issue in 2009/2010 than in the last few years with rapidly changing government policies stemming from the banking crisis not to mention changes in local, national and European legislation, rules and regulations.

Whilst there is an indication that the 'relationship' during the year has improved slightly, businesses appear to have a fairly neutral association with the National Park and those organisations within it which help promote the area to wider audiences. Steps to work and collaborate more closely may help to market the area more effectively and more clearly to target audiences.

Increasing confidence in the longer term suggests that businesses are looking forward to the future rather than being overly pessimistic, which can only be seen as a good thing. This coupled with the indication that in overall terms the Park area has seen more, rather than fewer customers, compared to a year previously and that these customer have been perhaps, more likely to part with more money are both positive signs that the tourism economy across the Park has a sound footing which businesses appear ready to exploit.