



progressive



Cairngorms Visitor Survey Presentation of Interim Findings

October 2014

Background

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

Research objectives

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

The four specific objectives of this study are:

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

This report focuses on findings from the Cairngorms National Park visitor survey for the months May to September 2014.

Method

- Quantitative research conducted
- Face to face interviews using CAPI technology
- Year-long visitor survey to be conducted from May 2014 – April 2015
 - Overall target sample size = 2,500 interviews
- Sample size targets set each month to ensure spread across the year
- 30 sample points used
 - Similar to previous surveys
- Random sampling – no quotas set
 - To ensure accurate visitor profile
- **This interim report presents findings from fieldwork conducted between May and September 2014 at the Cairngorms National Park**
 - **Interim sample size = 1,519 interviews**
- Margins of error for the results shown are $\pm 0.5\%$ to $\pm 2.5\%$

Analysis and reporting

- Data has been analysed by various cross-breaks, such as visitor type and origin.
- Differences are highlighted where relevant in this report, only where they are statistically significant.
- The National Park is also interested in trends since the previous survey (conducted in 2009/10); however, the 2009/10 report is based on the full year's data so the visitor profile is likely to be different to the profile from May-September. We have therefore not included comparisons with the previous findings in this report.

Sample distribution – month and day of the week

| Month | Sample Achieved | % of sample |
|--------------|-----------------|-------------|
| May | 257 | 17% |
| June | 277 | 18% |
| July | 390 | 26% |
| August | 366 | 24% |
| September | 229 | 15% |
| TOTAL | 1519 | 100% |

| Day of the Week | Sample Achieved | % of sample |
|-----------------|-----------------|-------------|
| Monday | 255 | 17% |
| Tuesday | 221 | 15% |
| Wednesday | 326 | 21% |
| Thursday | 109 | 7% |
| Friday | 305 | 20% |
| Saturday | 221 | 15% |
| Sunday | 82 | 5% |
| TOTAL | 1519 | 100% |

Schedule of interviewing replicates previous surveys to ensure comparability of findings. Interviewing also focused on peak visitor months.

Sample distribution – location

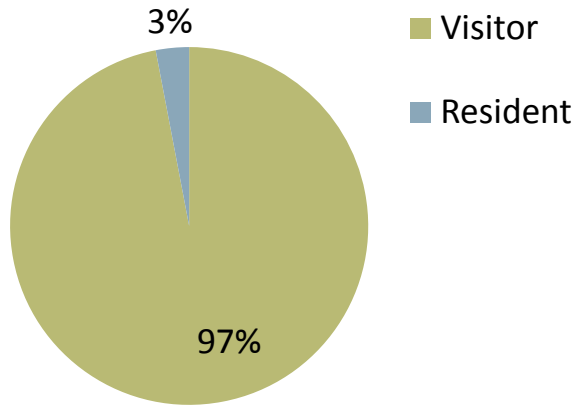
| Location | Sample Achieved | % of sample | Location | Sample Achieved | % of sample |
|---------------------------------------|-----------------|-------------|-------------------------------------|-----------------|-------------|
| Ballater - village centre/TIC | 95 | 6% | Loch Morlich/Glenmore Centre & Café | 42 | 3% |
| Blair Atholl - village square | 91 | 6% | Glenmore Road end | 42 | 3% |
| Landmark Centre, Carrbridge | 91 | 6% | Loch Muick Car Park | 42 | 3% |
| Aviemore, main street | 78 | 5% | Highland Folk Museum, Newtonmore | 40 | 3% |
| Braemar - village centre | 78 | 5% | Loch an Eilein | 39 | 3% |
| Grantown on Spey - main street | 70 | 5% | Osprey Centre Car Park, Loch Garten | 39 | 3% |
| Laggan Wolftrax | 57 | 4% | Linn of Dee Car Park | 39 | 3% |
| Balmoral Car Park | 55 | 4% | Glen Tanar Car Park | 39 | 3% |
| Kincraig Highland Wildlife Park | 53 | 3% | Rothiemurchus Car Park | 38 | 3% |
| Glenlivet Distillery Car Park | 53 | 3% | Burn o'VAT Car Park, Dinnet | 38 | 3% |
| Tomintoul - village centre | 53 | 3% | Glen Doll/Clova Car Park | 37 | 2% |
| Kingussie - main street | 51 | 3% | Ralia - car park | 35 | 2% |
| Cairngorm Ski Centre | 49 | 3% | Glen Esk Car Park | 35 | 2% |
| Speyside Heather Centre, Skye of Curr | 47 | 3% | Lecht Ski Area | 26 | 2% |
| Royal Lochnagar Distillery Car Park | 45 | 3% | Glenshee | 22 | 1% |

Good spread of interviews across the National Park

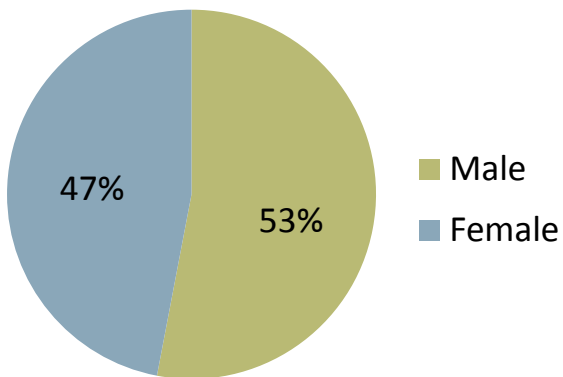
Visitor profiling

Profile – residence, gender and age

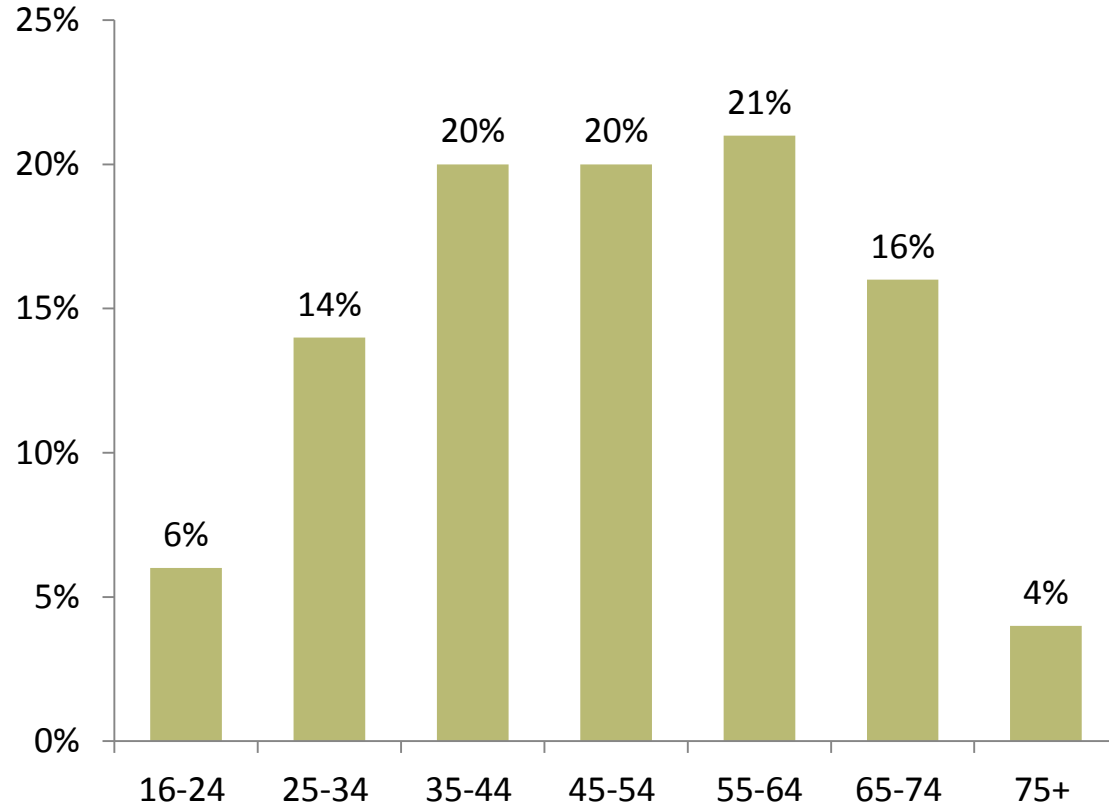
Visitor/Resident



Gender

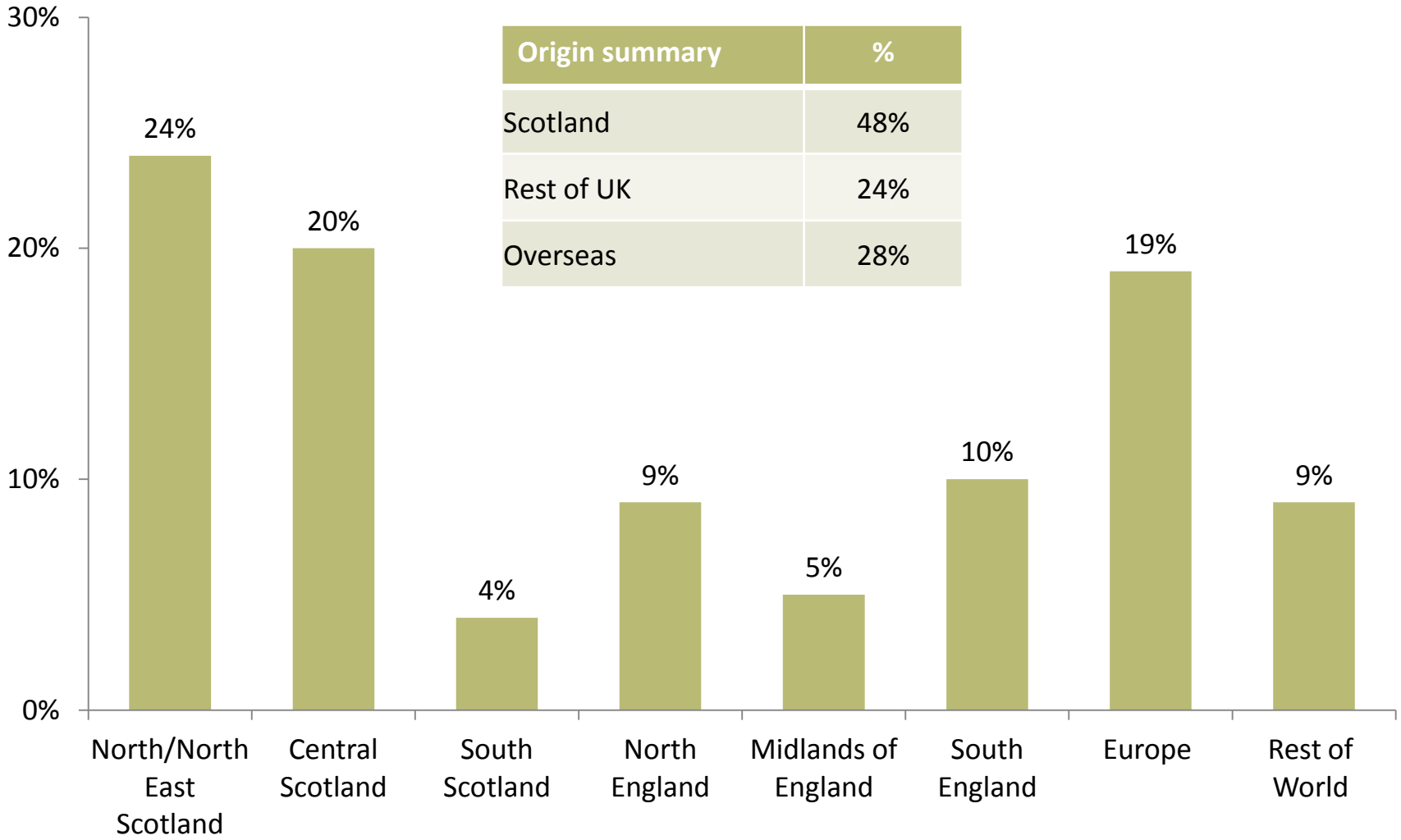


Age

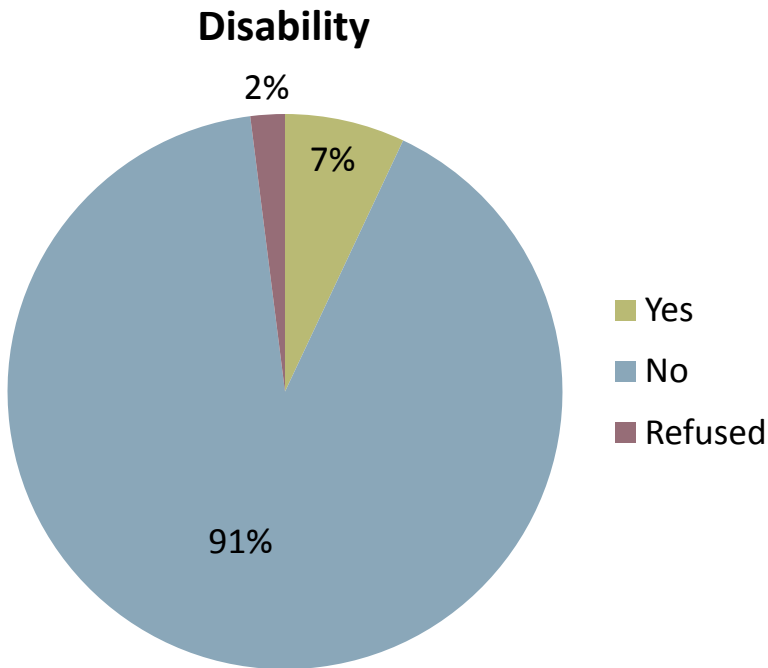


Good demographic spread across age and gender.

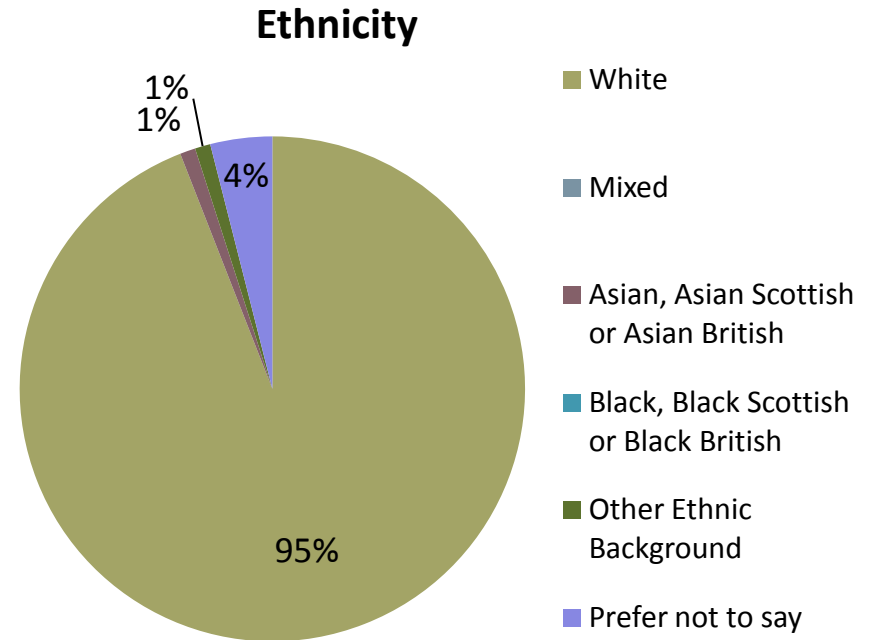
Profile – origin of visitors



Profile – disability and ethnicity



Lower than the Scottish national average (20%).



Slightly lower than the Scottish national average (4%).

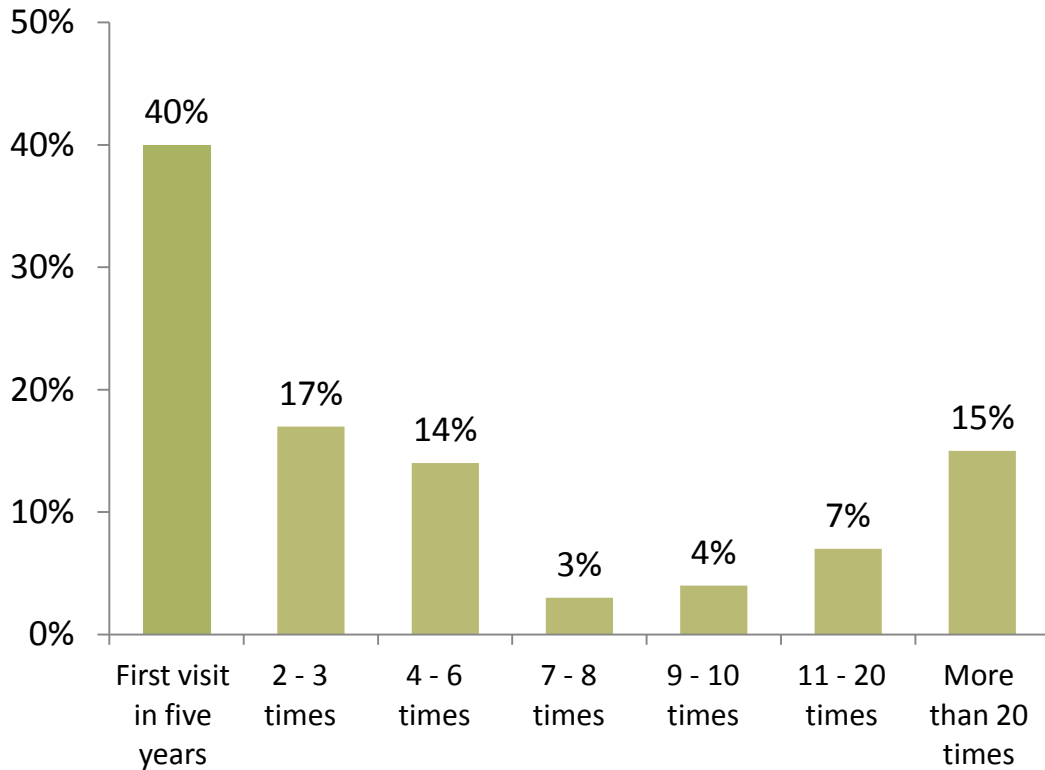
Profile – working status & social grade

| Working status | % |
|------------------------------|-----|
| Working – full time | 55% |
| Working – part time | 6% |
| Self-employed | 3% |
| Unemployed | 0% |
| Retired | 25% |
| Looking after home / family | 2% |
| Permanently sick or disabled | 0% |
| Student | 4% |
| Refused | 4% |

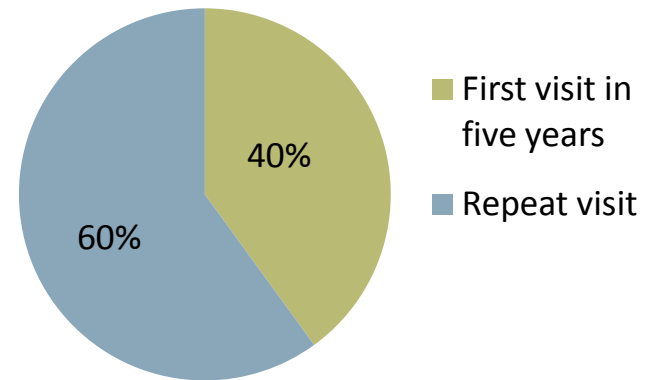
| Social Grade | % |
|--------------|-----|
| AB | 31% |
| C1 | 44% |
| C2 | 13% |
| DE | 3% |
| Refused | 8% |

Visitors are more affluent than national average.

Number of times visited

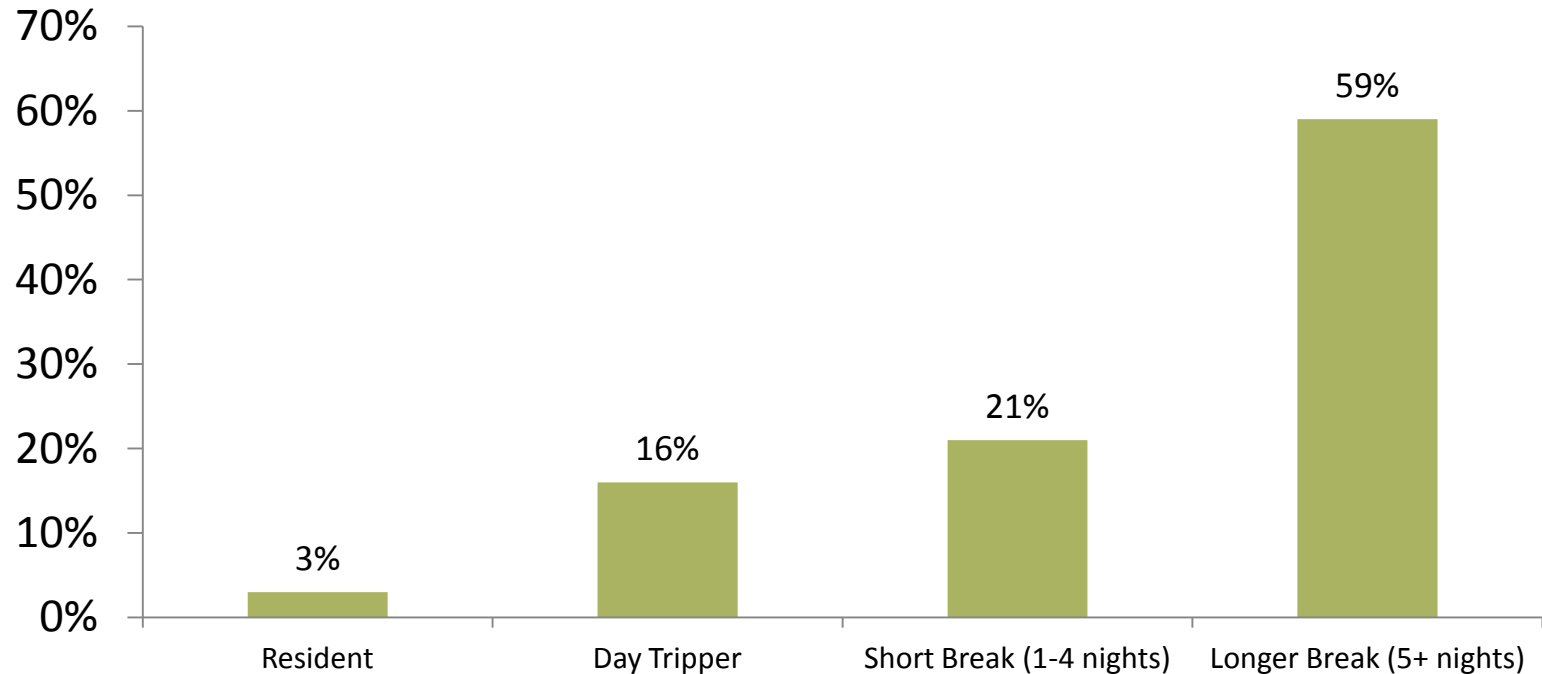


First and Repeat Visitors



A high proportion of visitors are repeat visitors – this indicates that Cairngorms delivers a good visitor experience motivating people to return time and again.

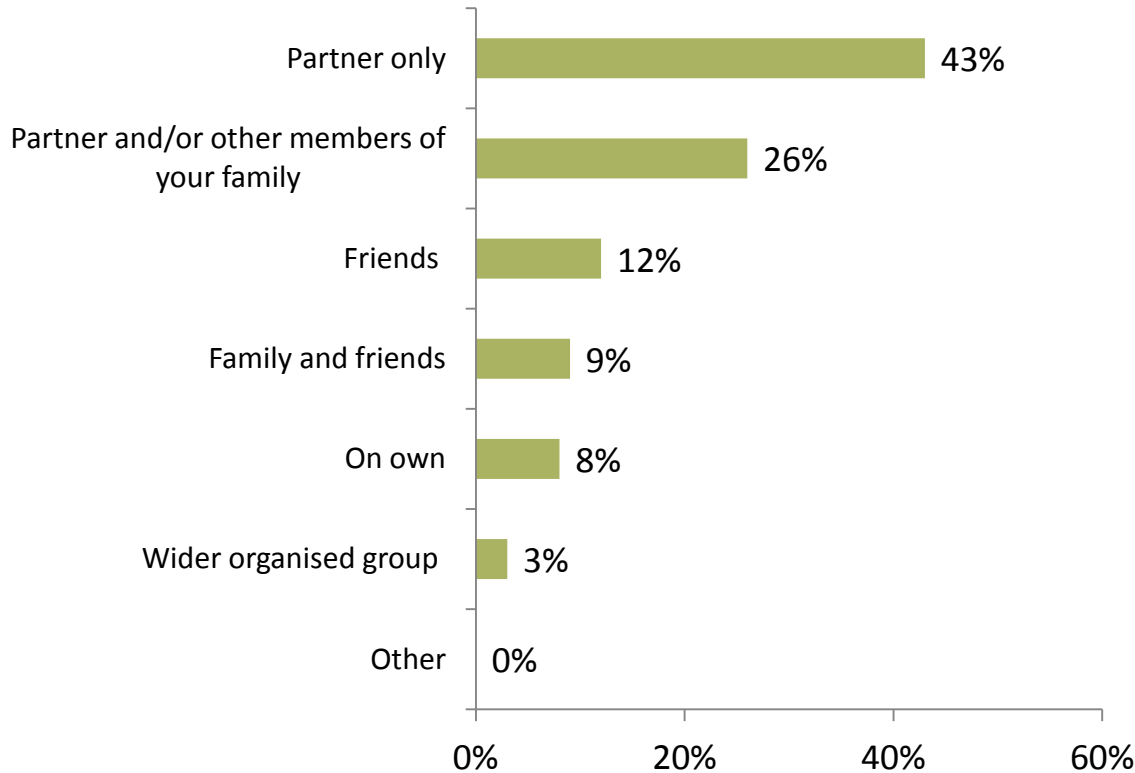
Type of visitor



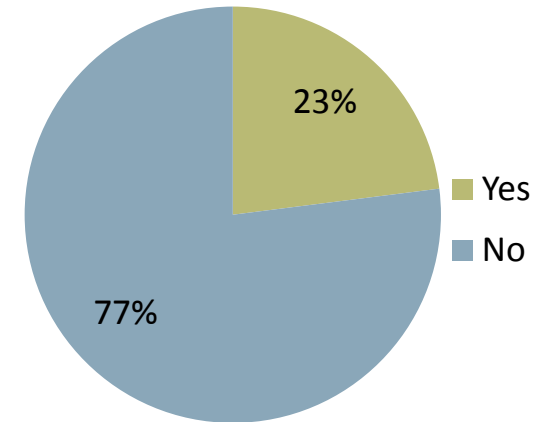
Around 1/5 are day visitors and 4/5 are overnight visitors → Cairngorms is a location that people want to spend a longer period of time during visit. Findings will also be influenced by remoteness and the time taken to travel to the area.

Who respondents visited with

What people are in your party on this trip?



Children in party



The Cairngorms National Park is primarily a destination for couples and families.

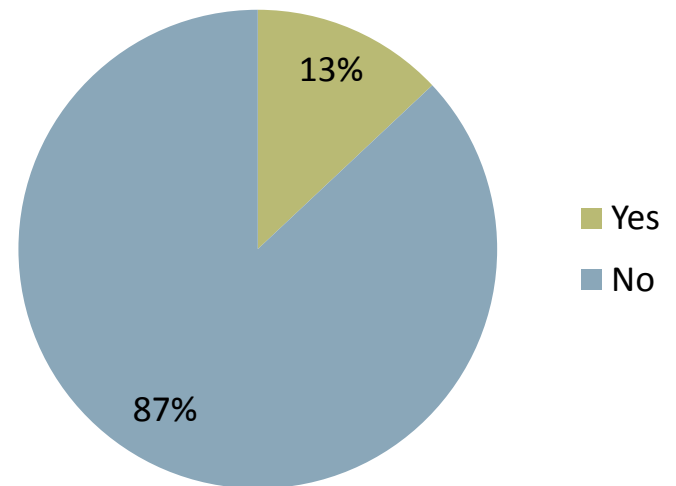
Who respondents visited with

| Number in party | % |
|-----------------|-----|
| One | 9% |
| Two | 52% |
| Three | 11% |
| Four | 15% |
| Five + | 13% |

| Number in party | Avg |
|-----------------------------|-----|
| Average number of adults | 2.7 |
| Average number of children* | 2.2 |
| Average group size | 3.3 |

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

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

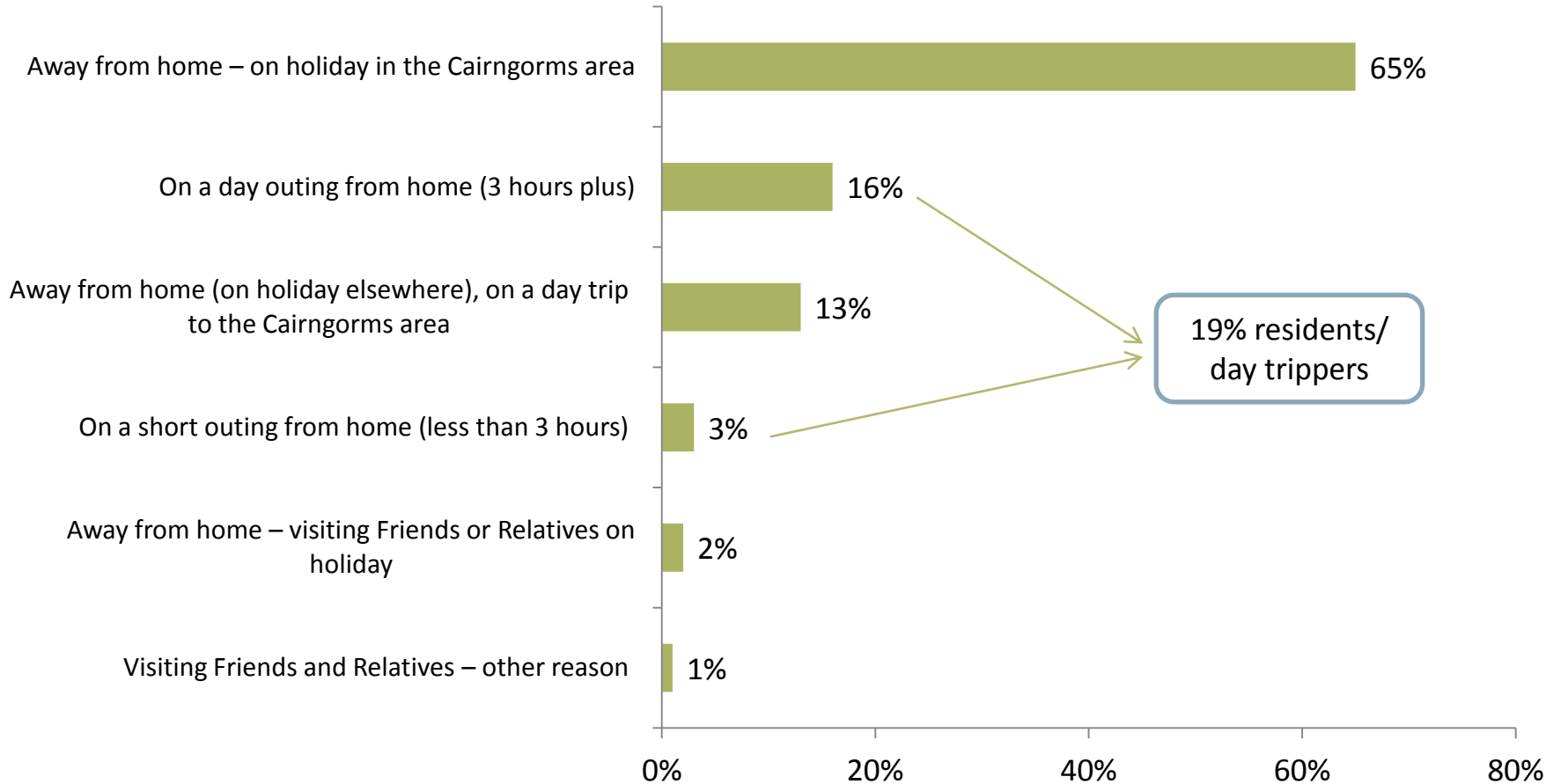


Summary: visitor profile

- 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 40% first time visitors (within the last five years).
- Visitors are most likely to come from Scotland (48%), with the remainder fairly evenly split between overseas (28%) and the rest of the UK (24%).
- Respondents were most likely to be visiting with their partner only (43%) or with partner and/or other members of their family (26%).
- Almost 6 in 10 (59%) were on a longer break away from home (5+ nights), with 21% on a shorter break, 16% on a day trip from home and 3% being residents.

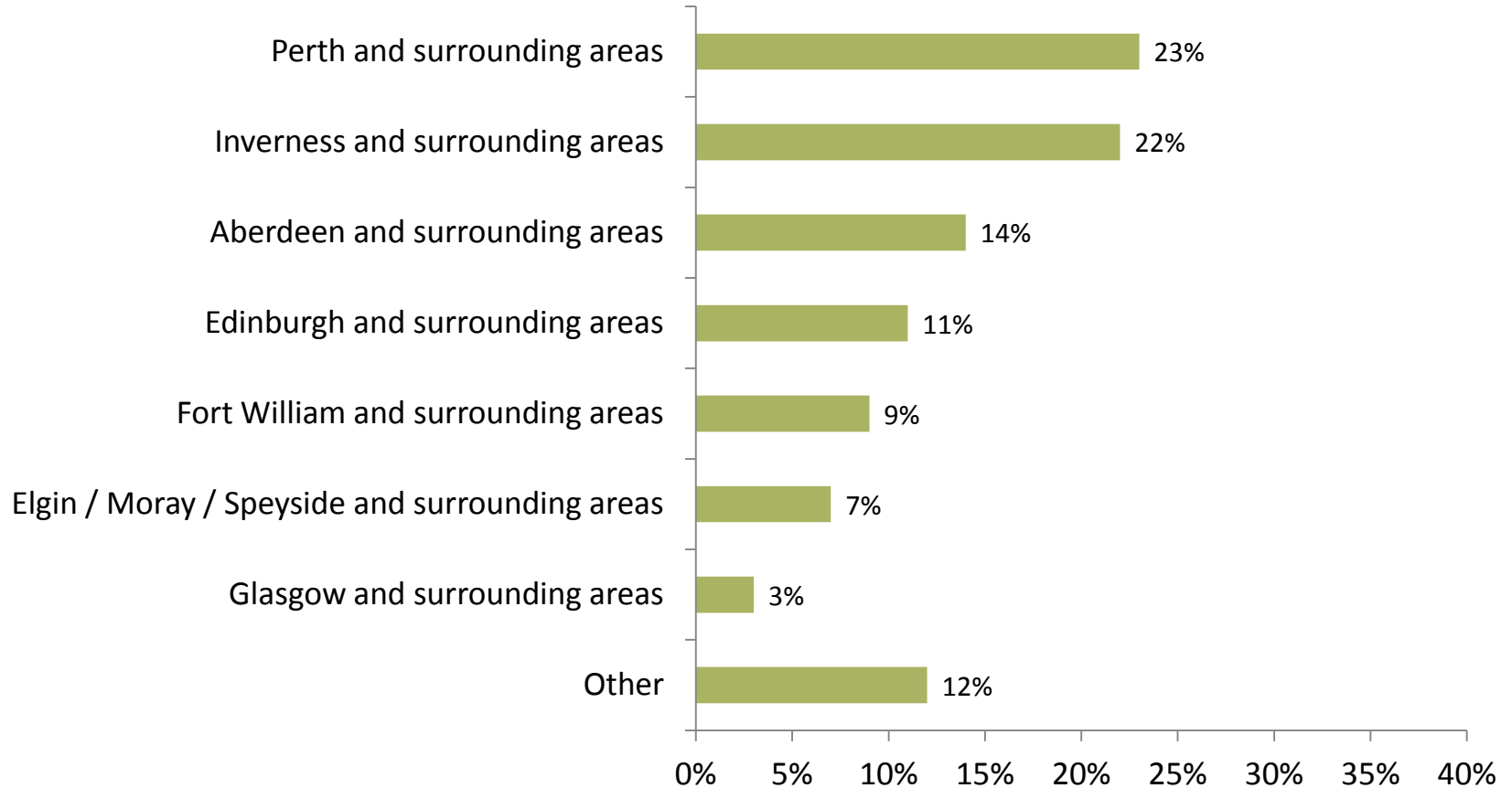
Visit characteristics

Type of visit



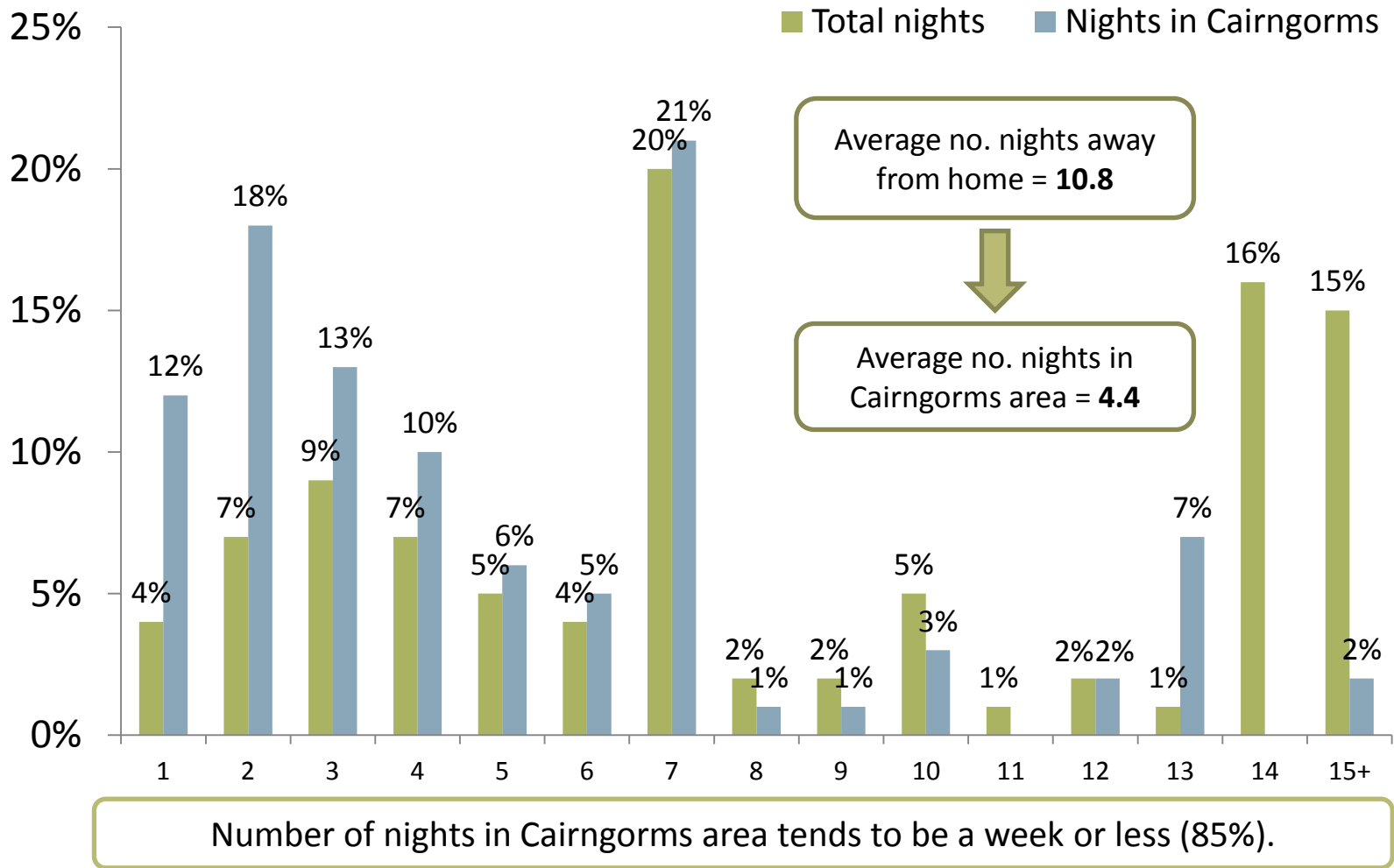
The majority of visitors are on holiday in the Cairngorms area.

Where day trippers travelled from



Day trippers tend to come from within a 2 hour drive time of Cairngorms area.

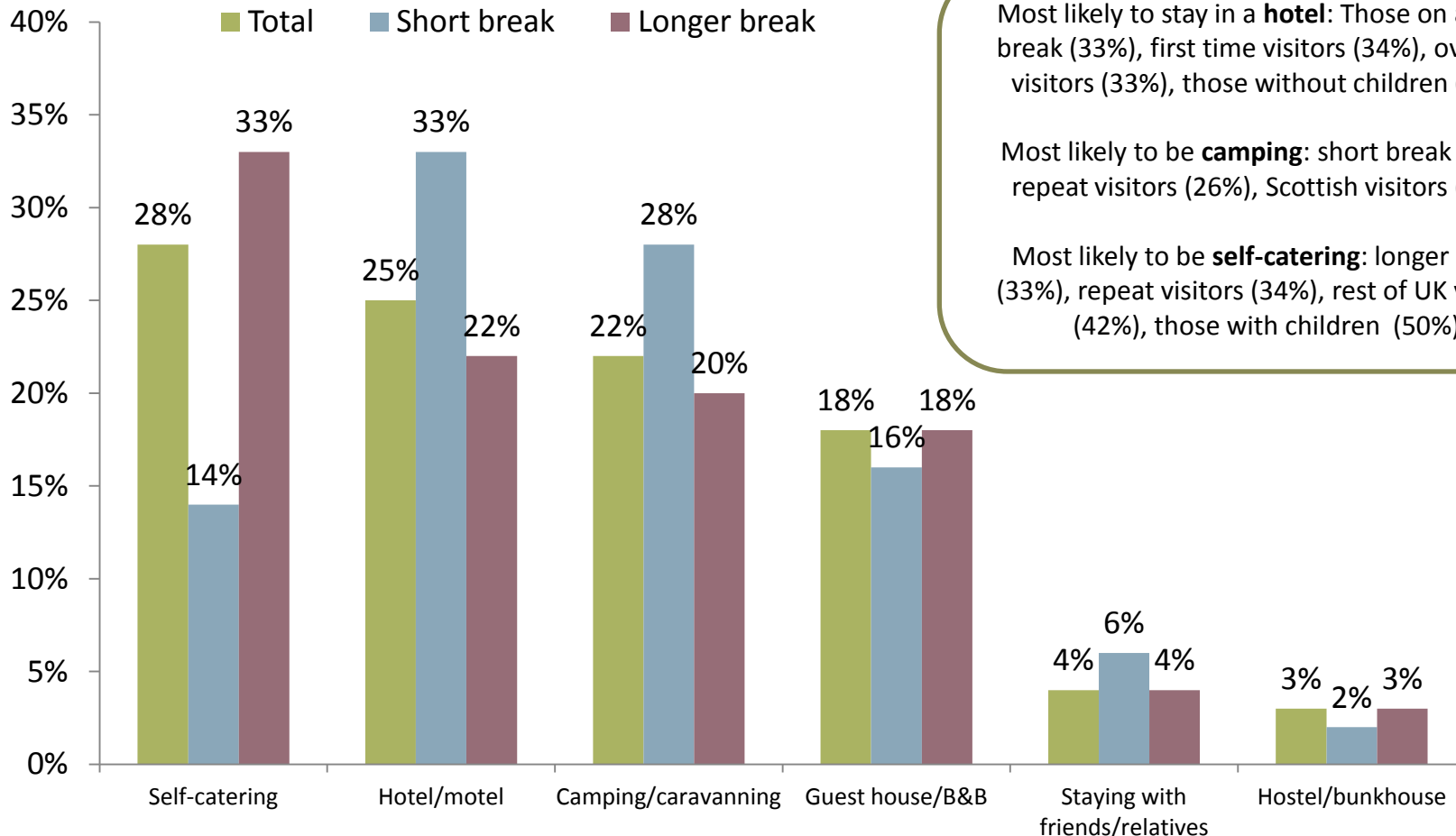
Number of nights away from home/in Cairngorms



Q2 - How many nights in total will you be spending away from home on this trip?
 Q2a - How many of these nights will you be spending in the Cairngorms area?

Base (All visitors away from home): 1217
 Base (all visitors staying in Cairngorms): 987

Type of accommodation



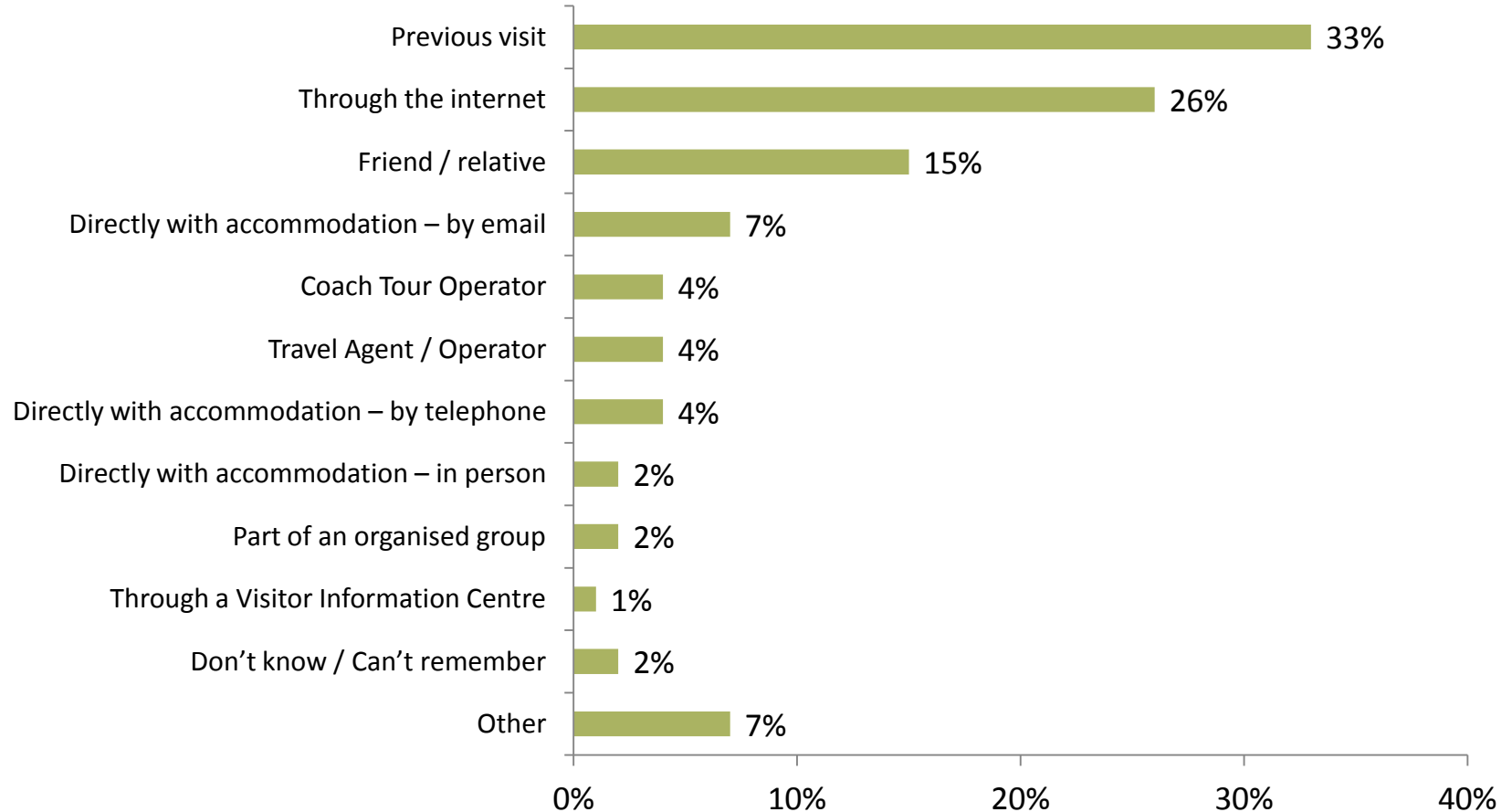
Most likely to stay in a **hotel**: Those on a short break (33%), first time visitors (34%), overseas visitors (33%), those without children (28%)

Most likely to be **camping**: short break (28%), repeat visitors (26%), Scottish visitors (28%)

Most likely to be **self-catering**: longer break (33%), repeat visitors (34%), rest of UK visitors (42%), those with children (50%)

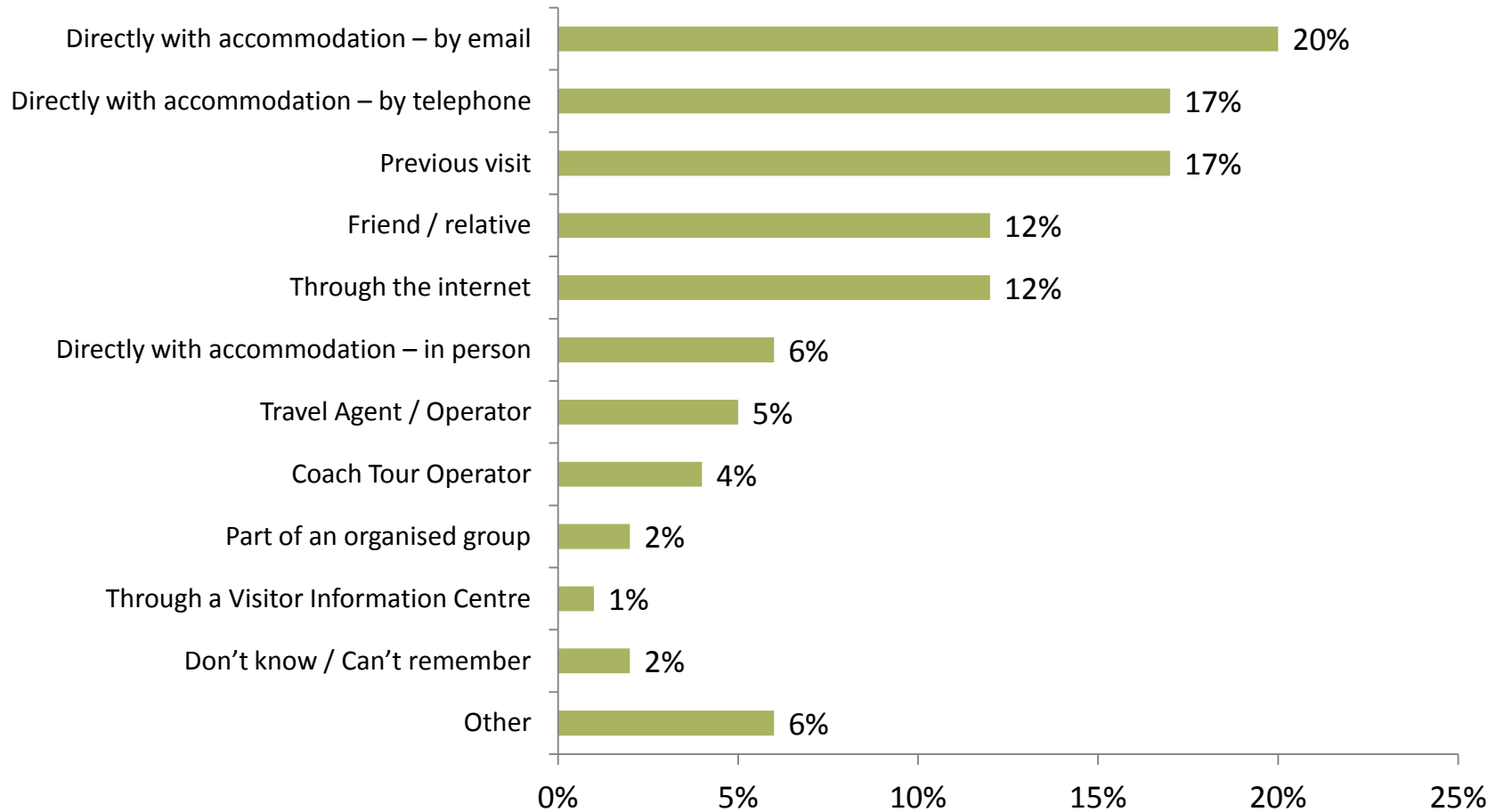
Visitors use a variety of accommodation types to fit with needs and budget – Cairngorms area appears to provide good variety of accommodation types, with none predominating.

How visitors found out about accommodation



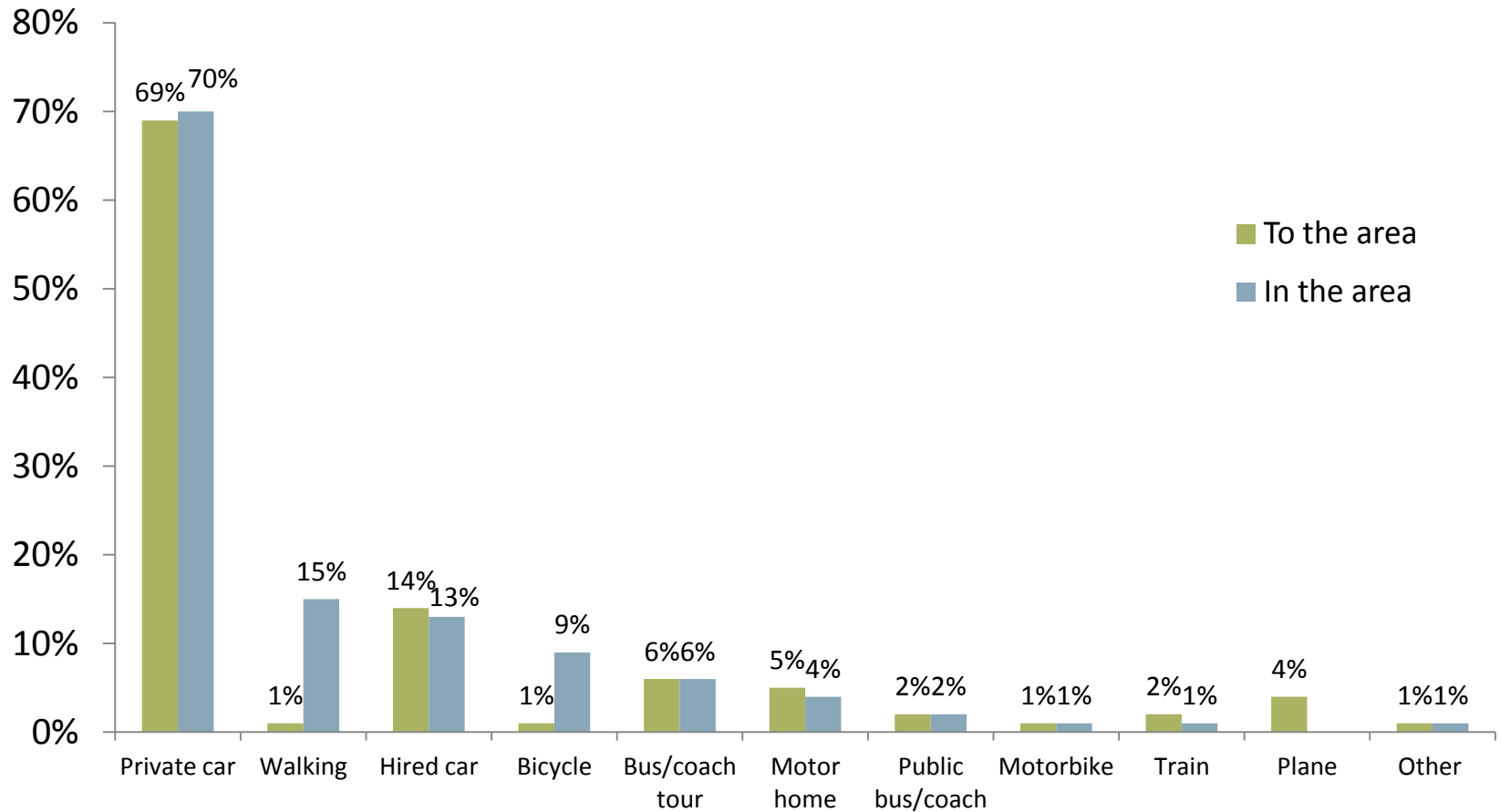
Experience (both own and that of others) is vital → repeat visits and recommendations
 The internet is also very important → accommodation must have a good online presence

Booking accommodation



Visitors are most likely to be independent – booking directly rather than through operators or agents.

Method of transport



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

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

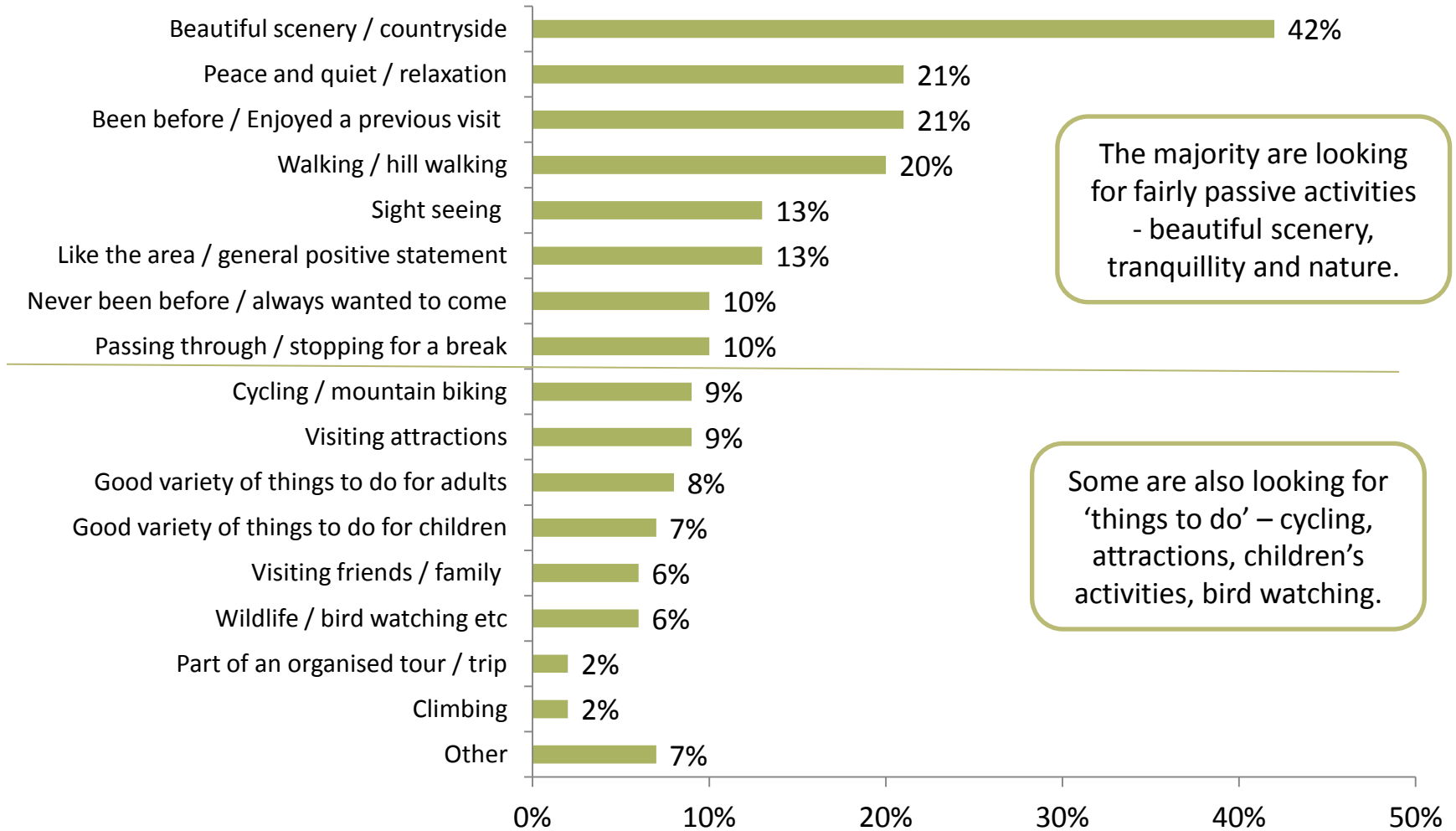
Base Q9: (All visitors): 1467; Q9a (All): 1519

Summary: visit characteristics

- The majority of visitors were away from home on holiday. Day trippers tend to come from within a 2 hour drive time of Cairngorms area.
- Those on holiday were spending an average of 10.8 nights away from home, with an average of 4.4 of these spent in the Cairngorms area.
- Self-catering accommodation was most popular, followed by hotels and then camping → although all accommodation types were mentioned by significant proportions of respondents.
- Most visitors found out about their accommodation through a previous visit, from the internet, or from friends/relatives.
- They were most likely to book their accommodation directly with the accommodation provider, by email, or by phone.
- The majority of visitors (69%) arrived by private car.

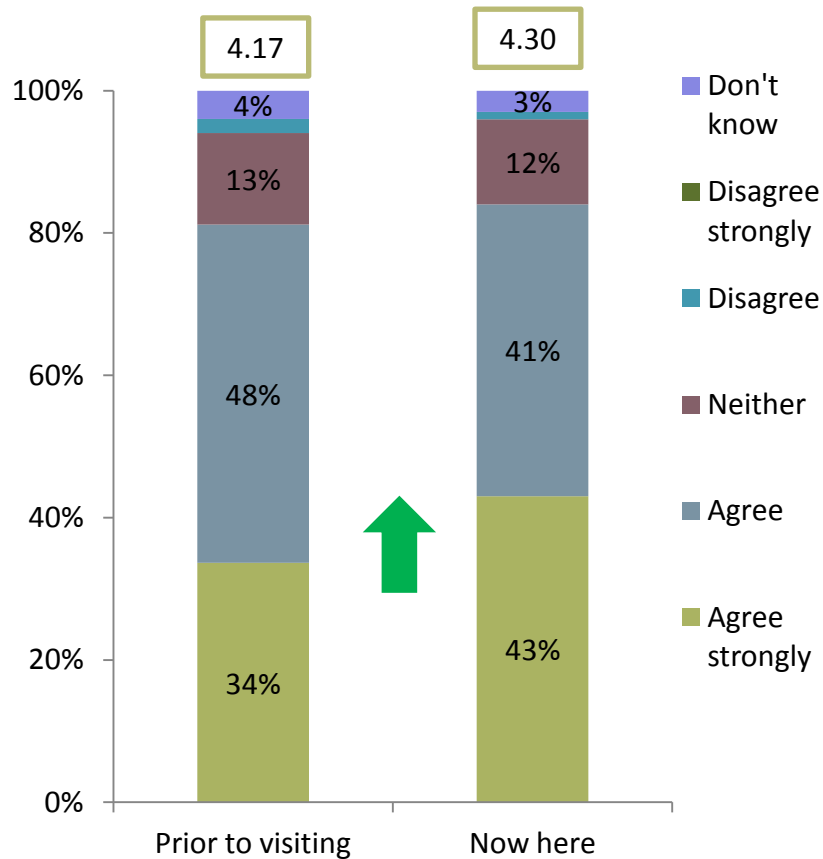
Reasons for visiting and expectations

Main reasons for choosing to visit Cairngorms area

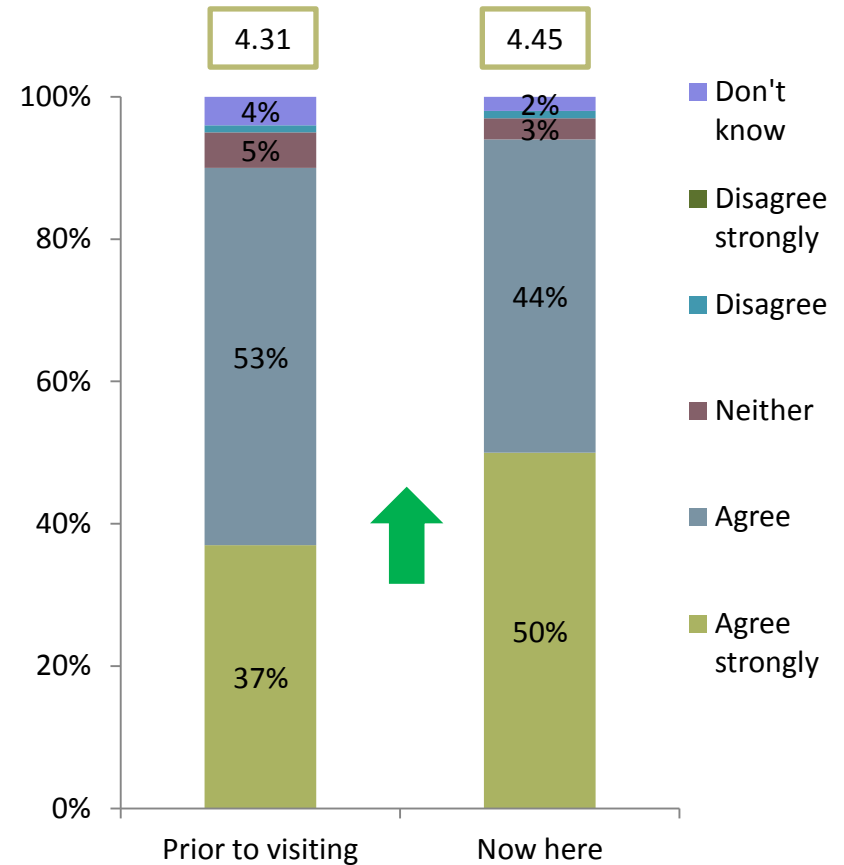


Perceptions of Cairngorms – ‘prior to visiting’ vs. ‘now here’

An area where it is possible to experience history and culture



An area where visitors are well catered for



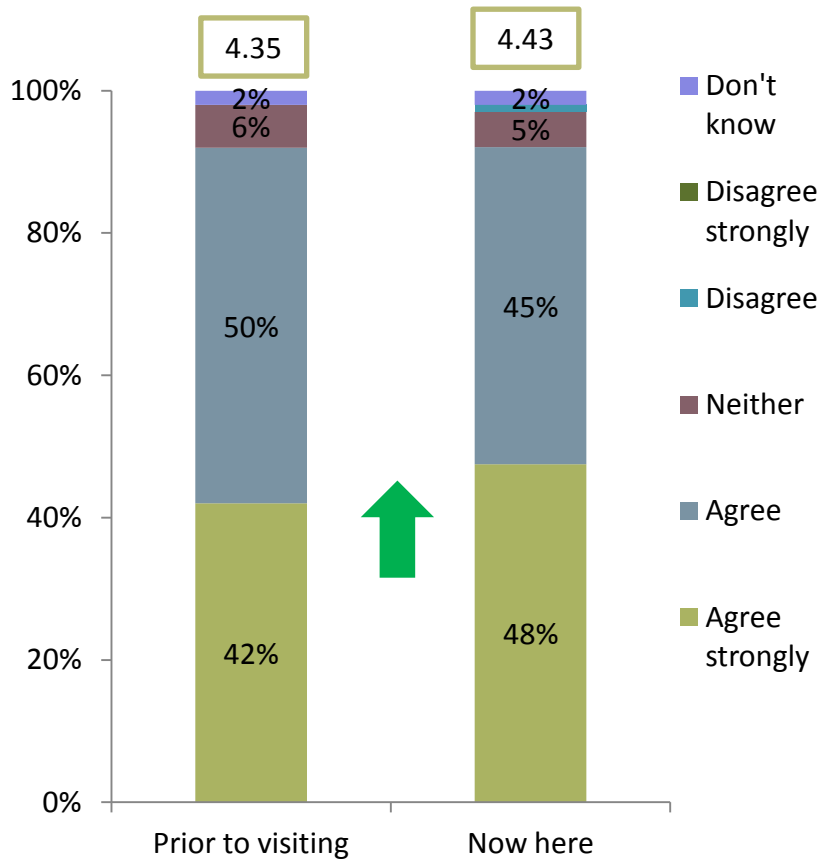
Q6a How much do you agree/disagree that the statement describes what you thought the Cairngorms area would be like, *prior to visiting*?

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

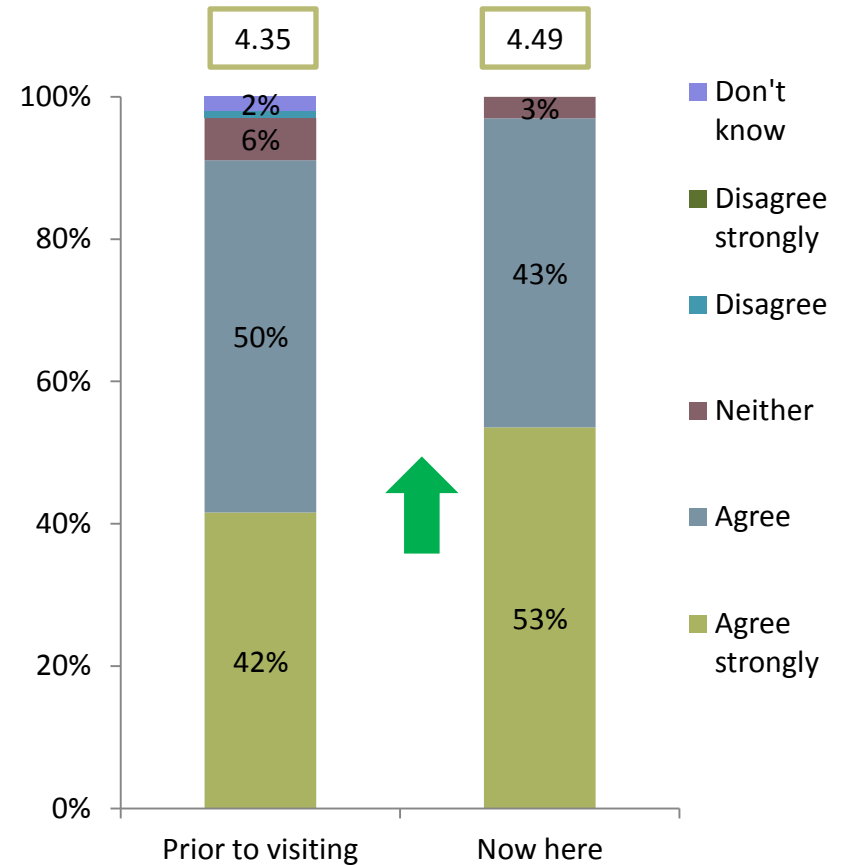
Base (All visitors): 1467

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

An area with great opportunities to see wildlife



A tranquil unspoilt wilderness where conservation is the key aim



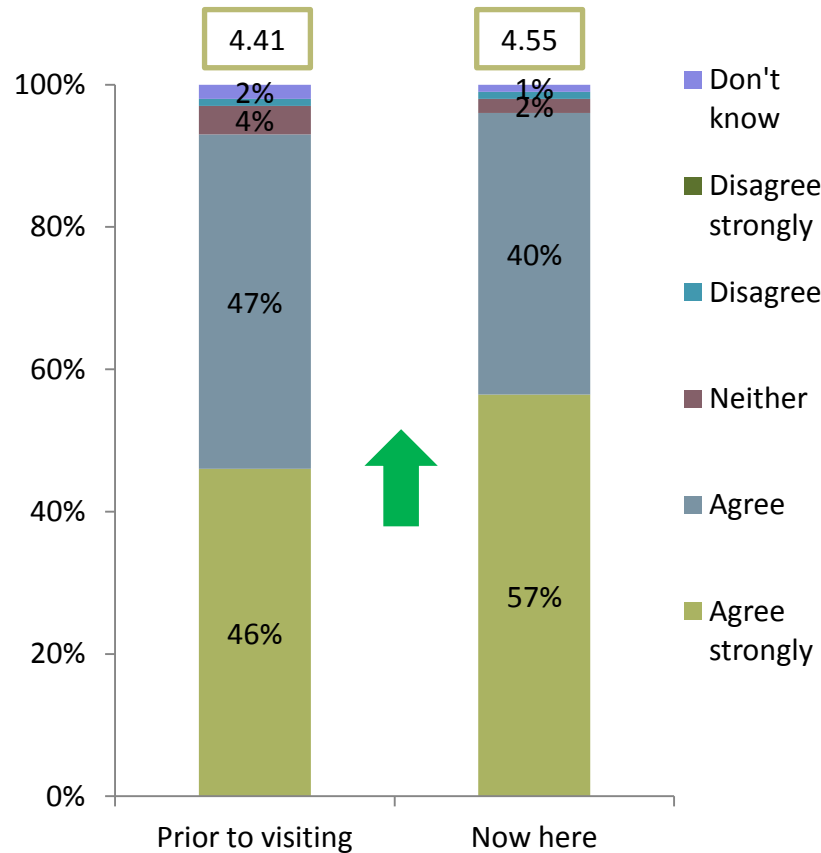
Q6a How much do you agree/disagree that the statement describes what you thought the Cairngorms area would be like, *prior to visiting*?

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

Base (All visitors): 1467

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

An area with plenty of attractions and outdoor activities



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

↓

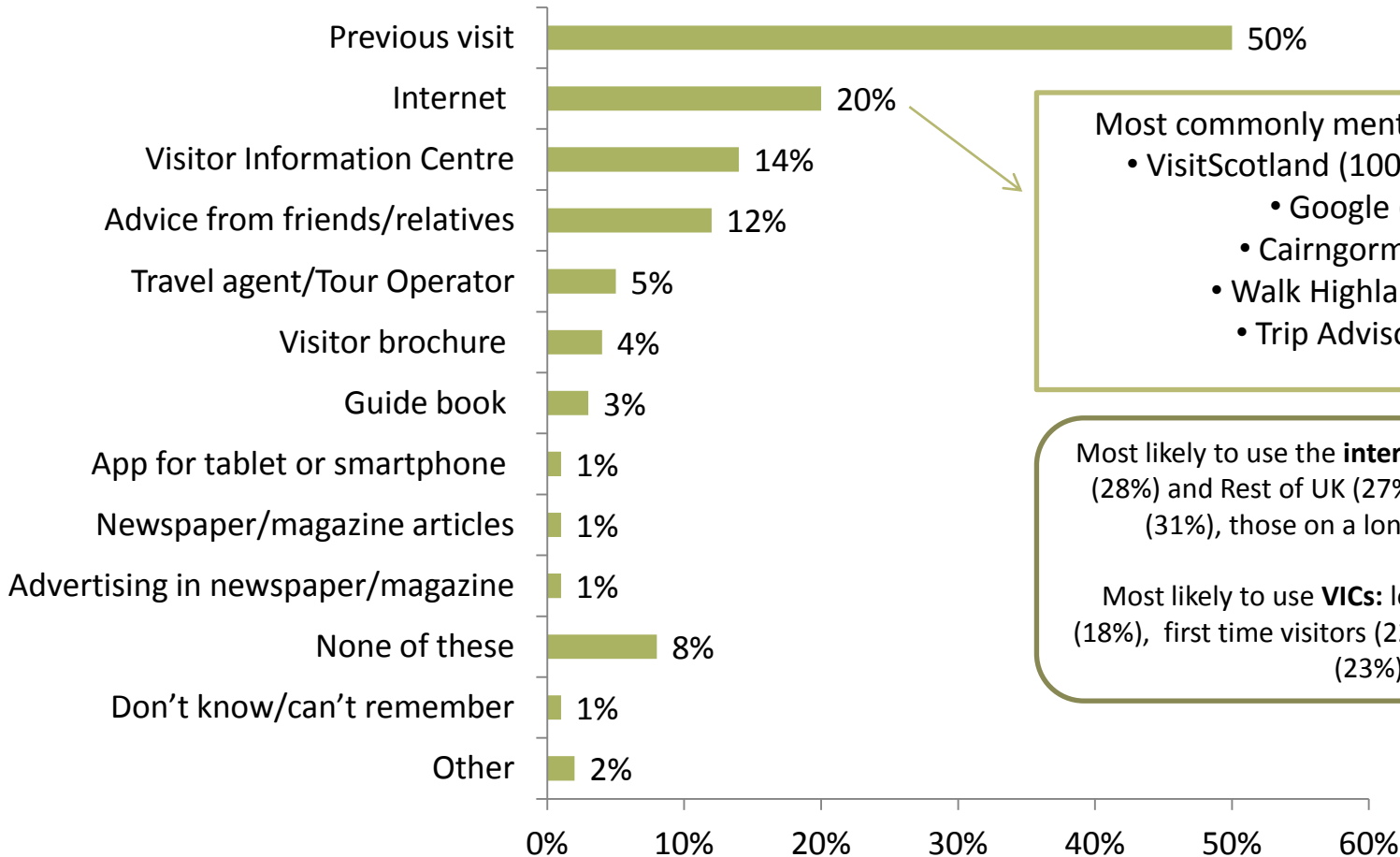
Their visit confirms and exceeds their expectations.

Summary: reasons for visiting and expectations

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

Information sources

Sources of information



Most commonly mentioned websites:

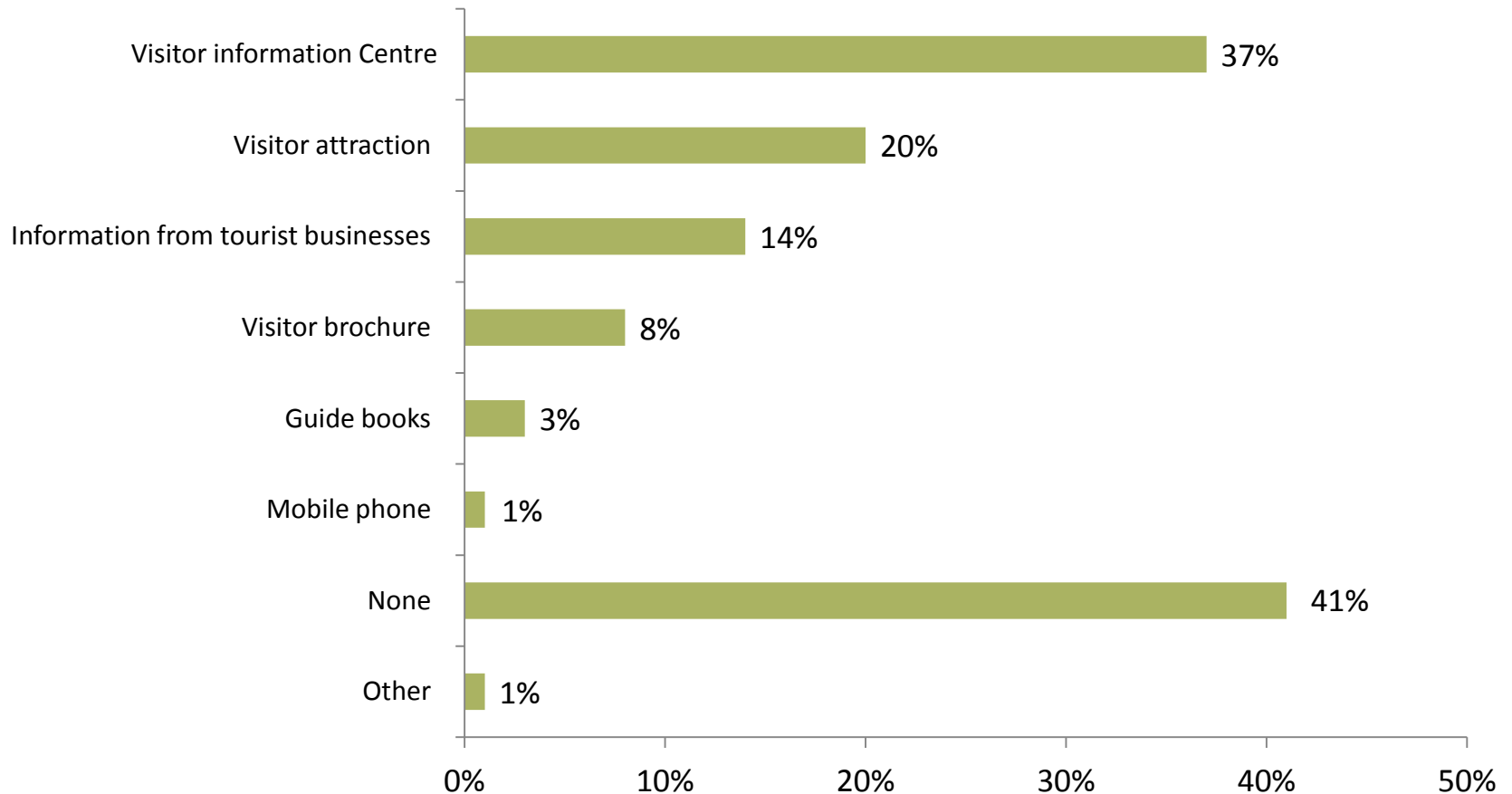
- VisitScotland (100 respondents)
- Google (74)
- Cairngorms (47)
- Walk Highlands (11)
- Trip Advisor (10)

Most likely to use the **internet**: Overseas visitors (28%) and Rest of UK (27%), first time visitors (31%), those on a longer break (26%)

Most likely to use **VICs**: longer break visitors (18%), first time visitors (22%), overseas visitors (23%)

Confirms that a combination of previous experience, word of mouth and the internet are key to informing visitors. VICs also mentioned by a significant minority.

Visitor information picked up



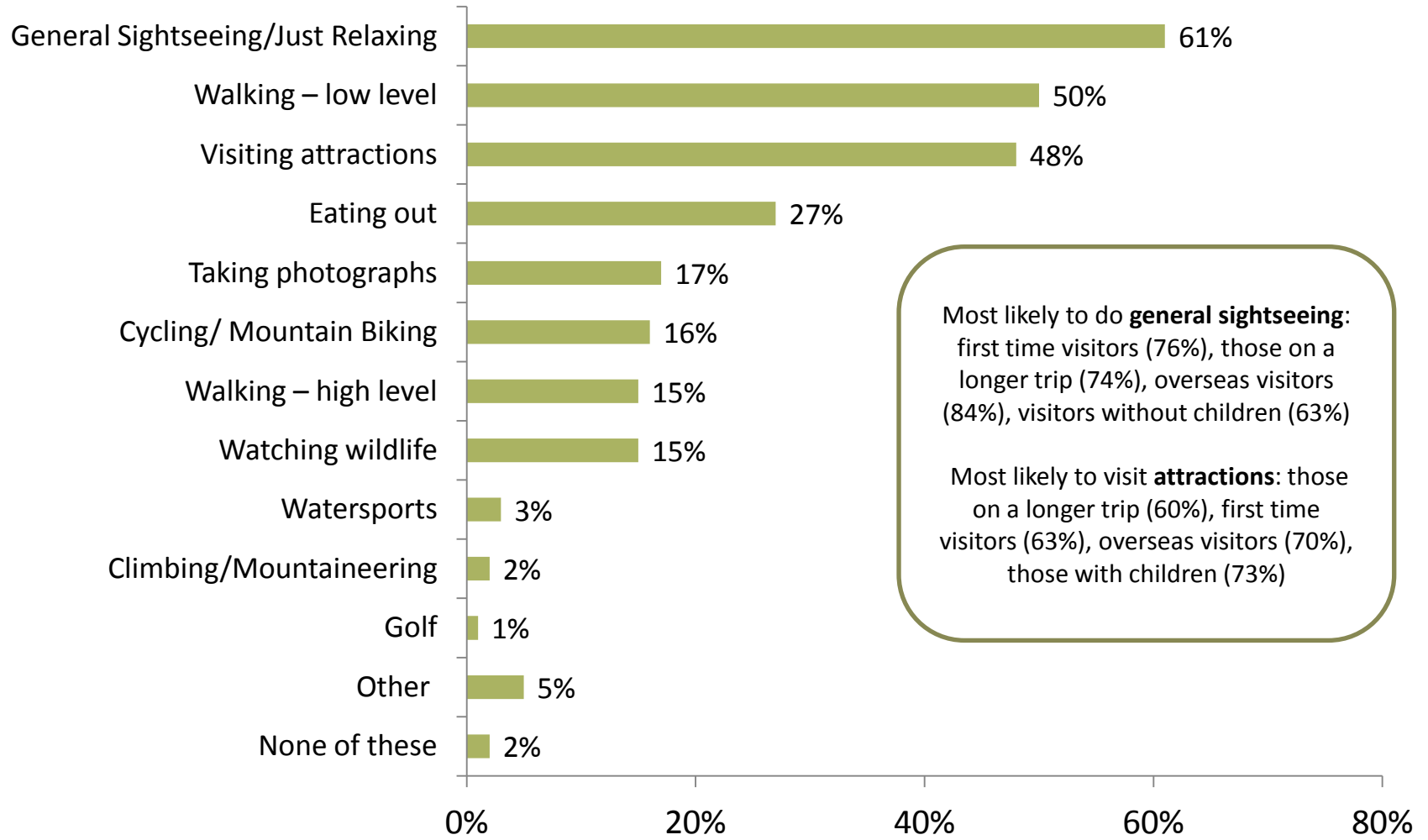
59% collected visitor information from somewhere – most frequently VICs and attractions.

Summary: information sources

- Half of respondents listed a previous visit as a source of information.
- The next most popular information sources were the internet (with VisitScotland, Google and the Cairngorms website being most commonly mentioned), Visitor Information Centres and advice from friends and relatives.
- Almost one in ten (8%) did not use any source of information before visiting.
- During their visit, six in ten had picked up visitor information. The most commonly mentioned sources of information during the visit were Visitor Information Centres, visitor attractions and information from tourist businesses.

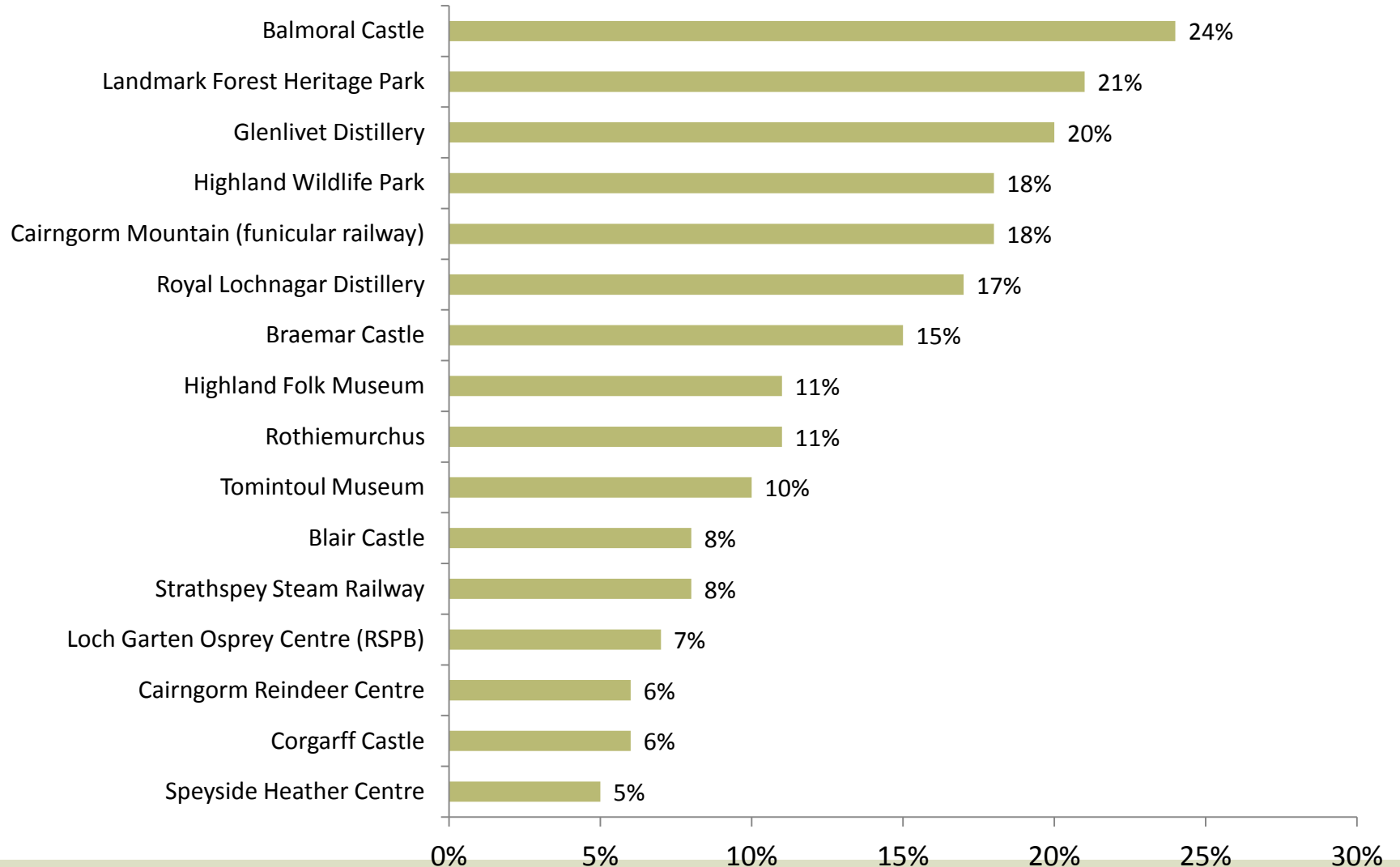
Activities undertaken in the Cairngorms

Top activities undertaken



Top attractions visited

(% of those who had visited an attraction)



Q11 - Which attraction(s) have you, or do you intend to, visit during your trip/day out to the Cairngorms area?

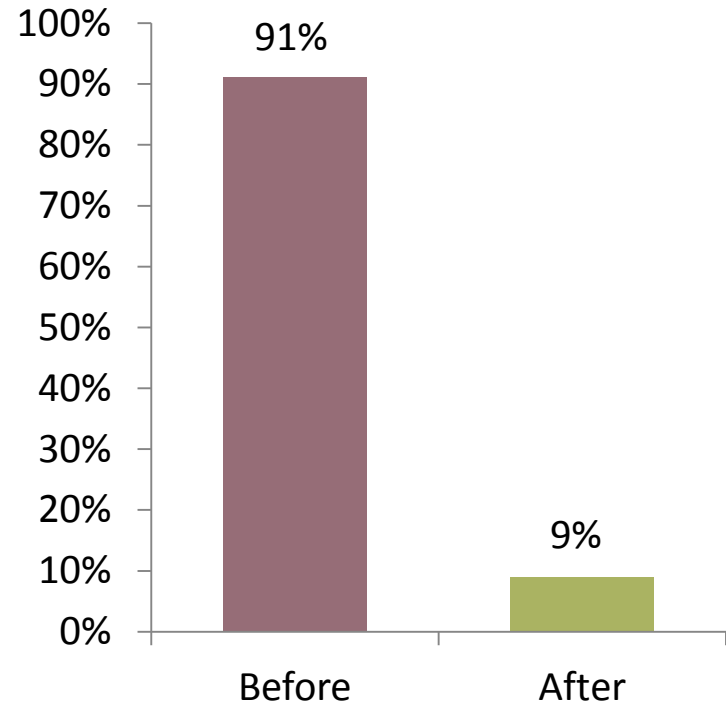
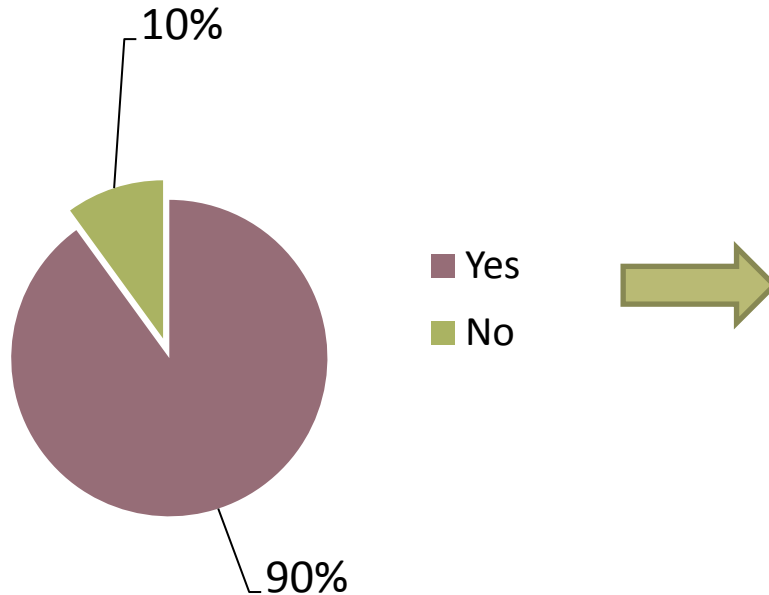
Base (All who visited attractions): 735

Summary: activities

- The most common activities undertaken during respondents' visit to the Cairngorms were:
 - General sightseeing
 - Walking – low level
 - Visiting attractions
 - Eating out
- Among those who visited attractions, the most frequently mentioned were:
 - Balmoral Castle
 - Landmark Forest Heritage Park
 - Glenlivet Distillery

Awareness of the National Park

Awareness of being in a National Park



Awareness was highest among: those on a short break (93%), repeat visitors (94%), rest of UK (96%) and Scottish visitors (94%), those with children (95%)

National Park status is well understood by visitors before they travelled – many are repeat visitors. However, awareness is also high for first time visitors → 83% aware, with 84% of these aware before travelling = 70% of all first time visitors aware before visit.

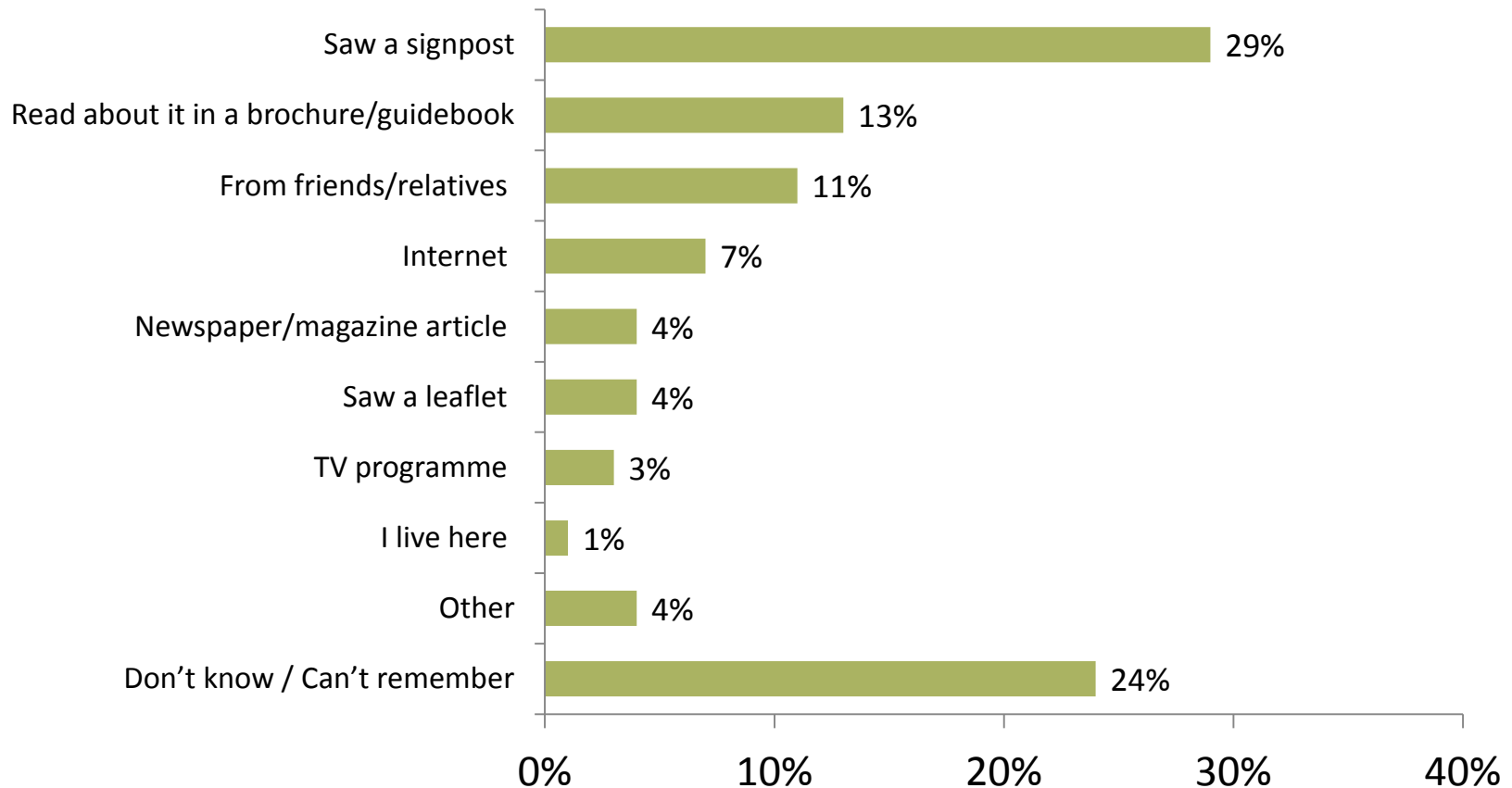
Q12 - Are you aware that you are in a National Park?

Base Q12 (All visitors): 1467

Q13 - Were you aware of this before or only after your arrival in this area?

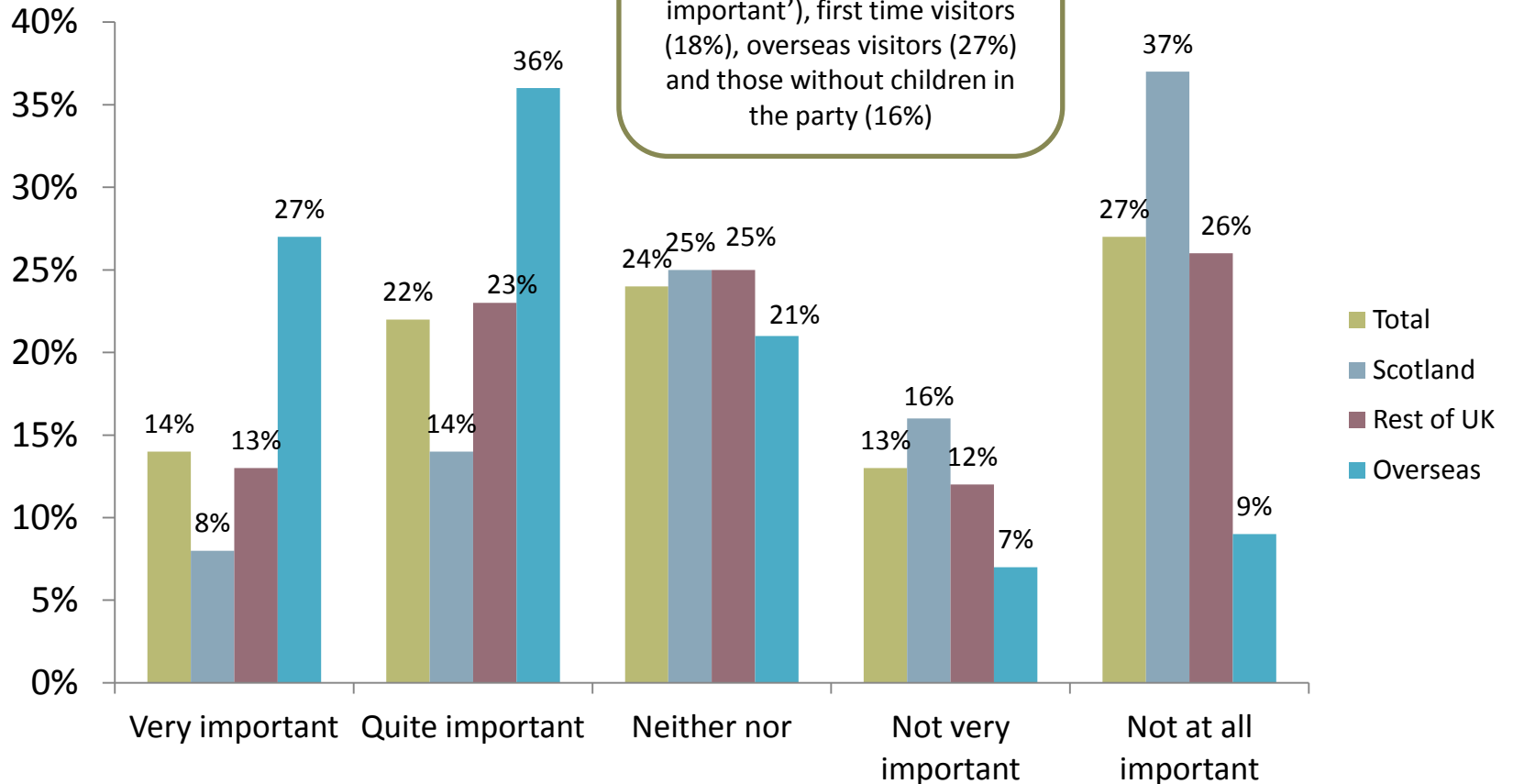
Base Q13 (All visitors aware): 1317

Sources of awareness of National Park



A variety of sources cited but signage around Cairngorms area is key to informing visitors of National Park status.

Importance of National Park status to decision to visit



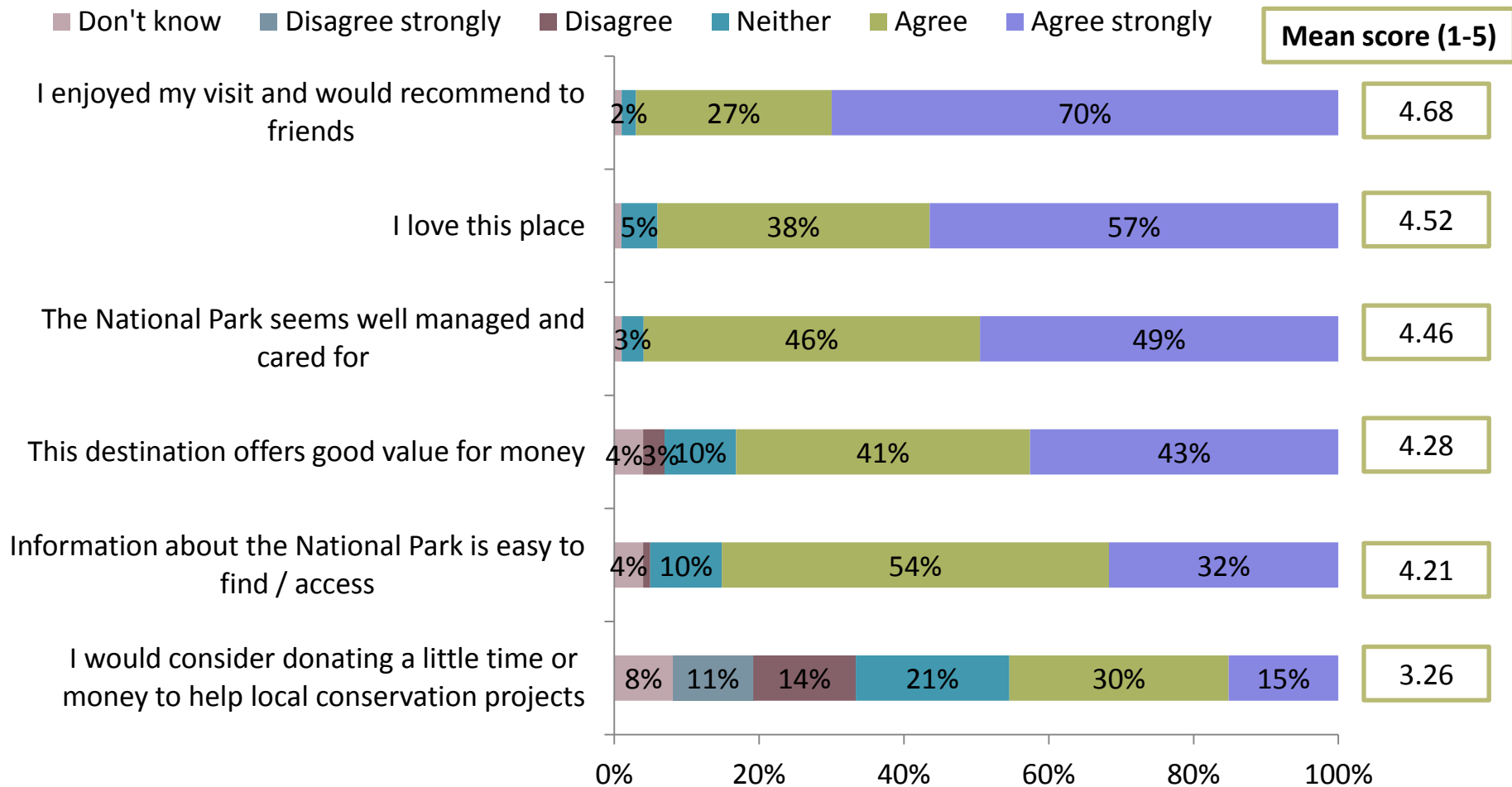
National Park status is clearly more important to overseas visitors (63%) and those from rest of UK (46%), than Scottish visitors (22%).

Summary: awareness of National Park

- Awareness of being in a National Park was high (90% were aware), with most of these being aware before they visited (91%). Even first time visitors showed good levels of prior awareness of National Park status.
- Respondents were most likely to mention signposts, guidebooks / brochures and friends / relative as sources of this awareness.
- However, the National Park status does not appear to be very strong in influencing decisions to visit – particularly for Scottish visitors.
- National Park status was most influential among those from overseas, on a longer trip and visiting the area for the first time.

Perceptions of the National Park

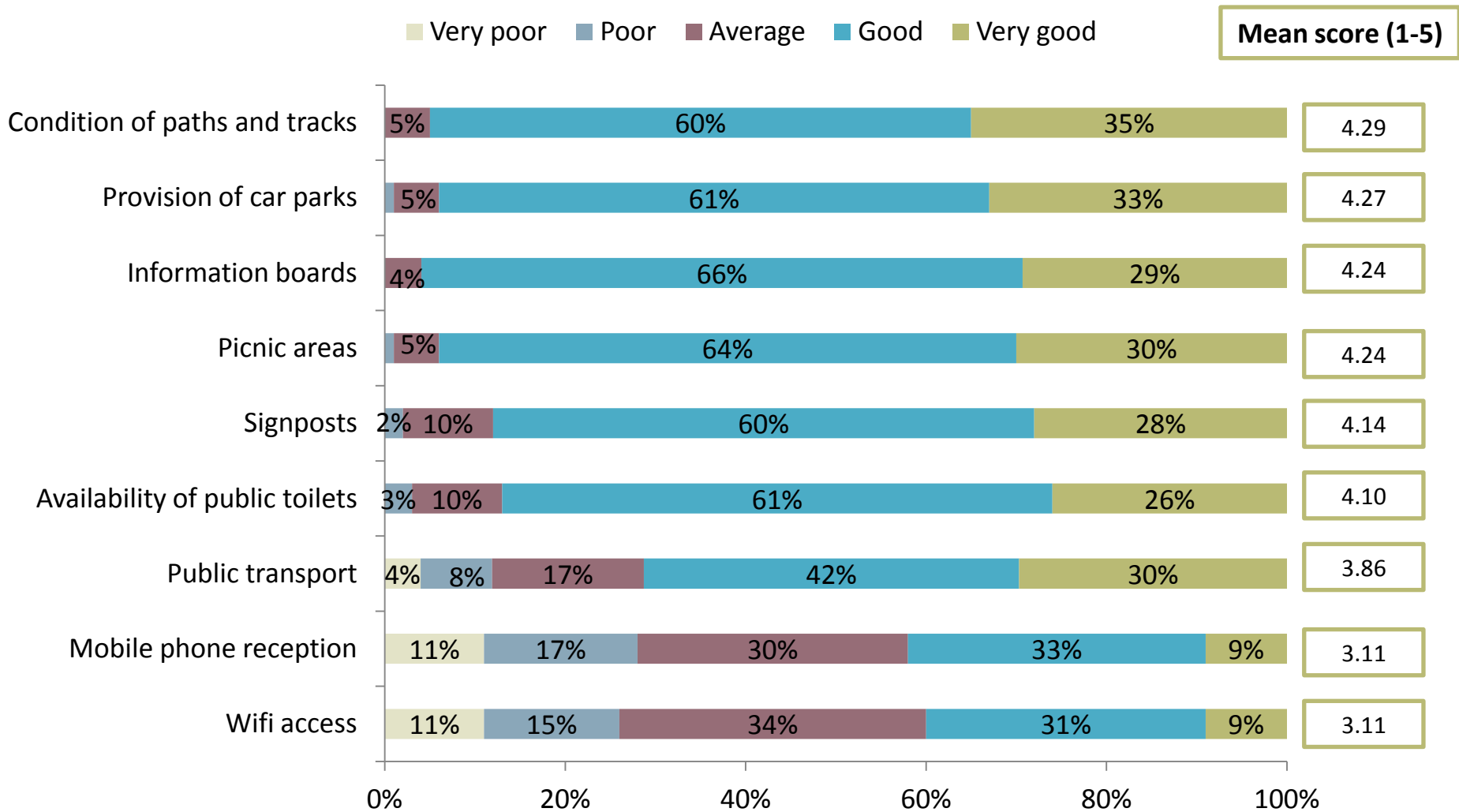
Perceptions of Cairngorms National Park



Positive perceptions – although some scope to move responses into 'agree strongly' category.

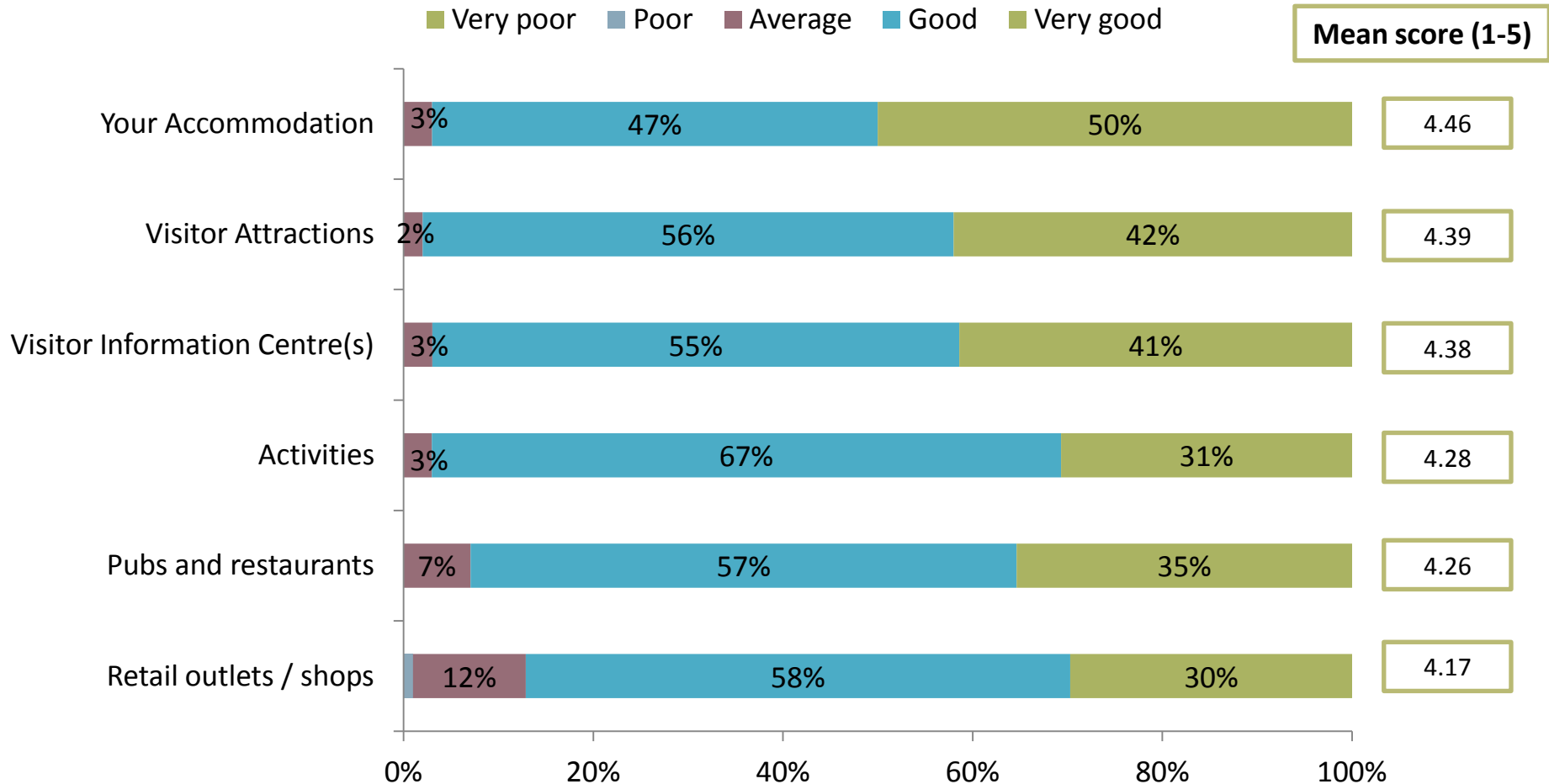
Base (All): 1519

Rating of facilities



Majority of facilities highly rated, with exceptions of mobile phone reception and Wi-Fi access.

Rating of customer service

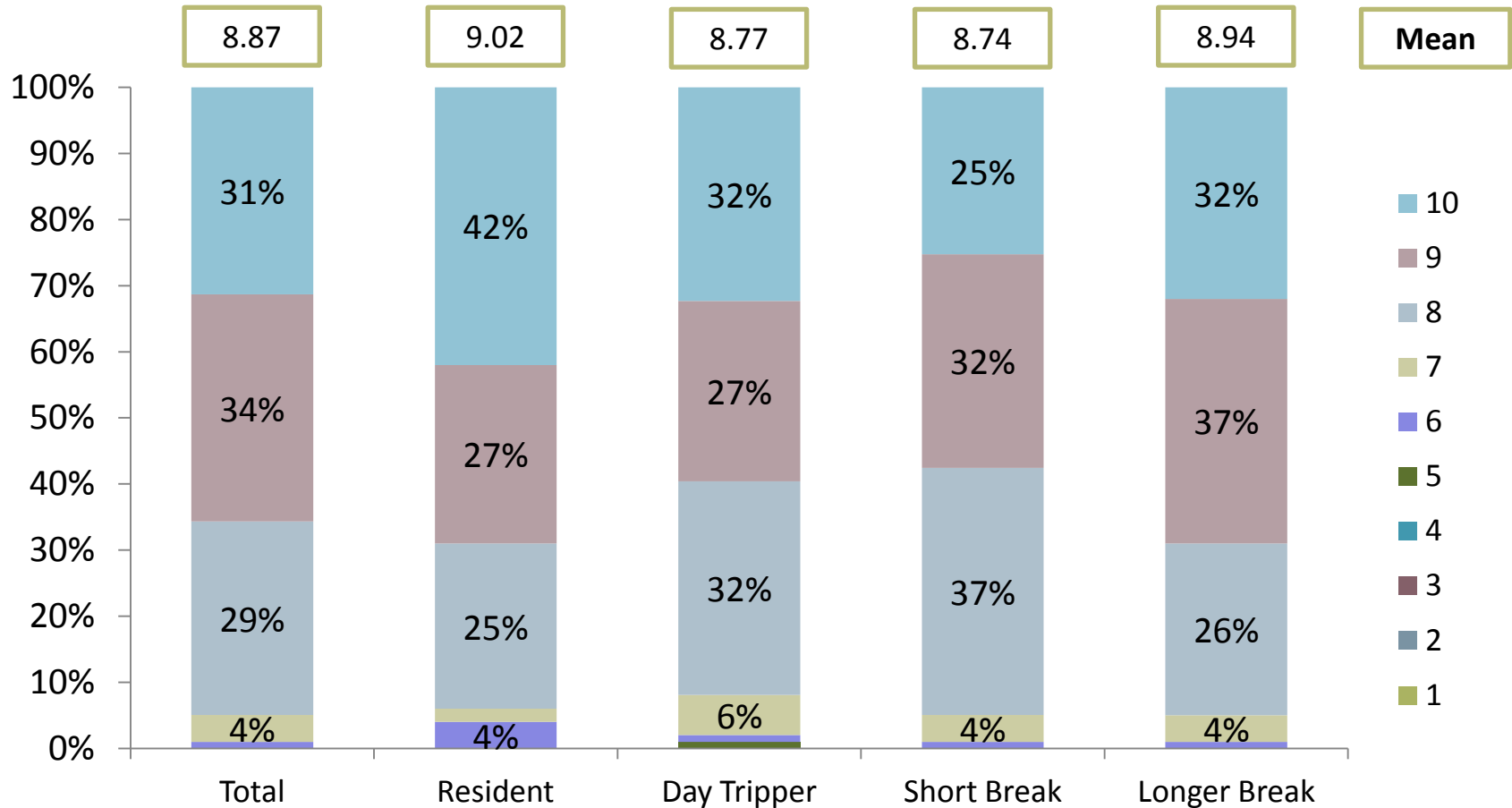


Very high approval of customer service across providers – some scope in future to move from 'good' to 'very good'.

Q21 - And please tell me how you would rate the customer service provided by staff at facilities you have used in the Cairngorms area this trip.

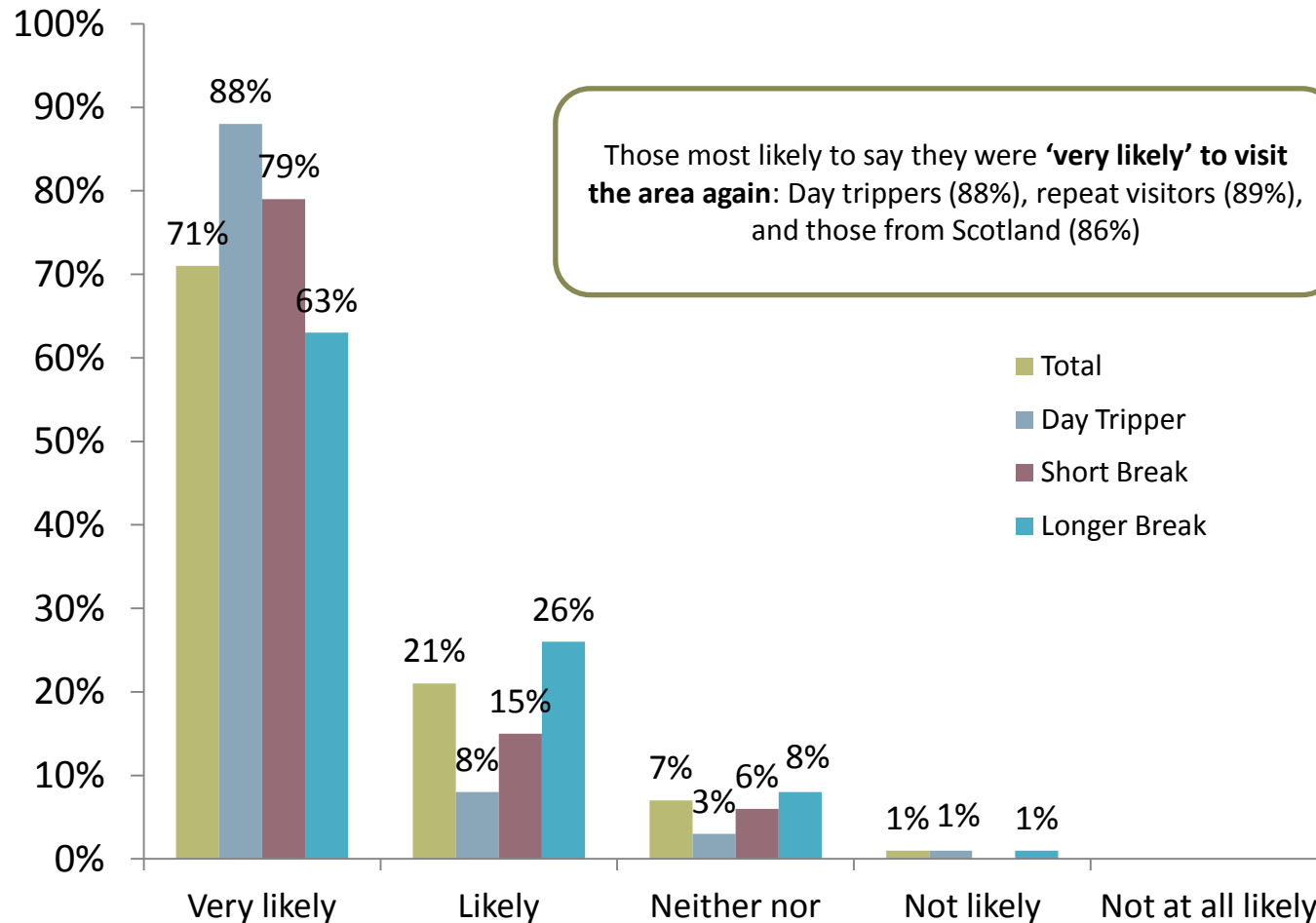
Base (All who used): 827-1040

Rating of overall visit



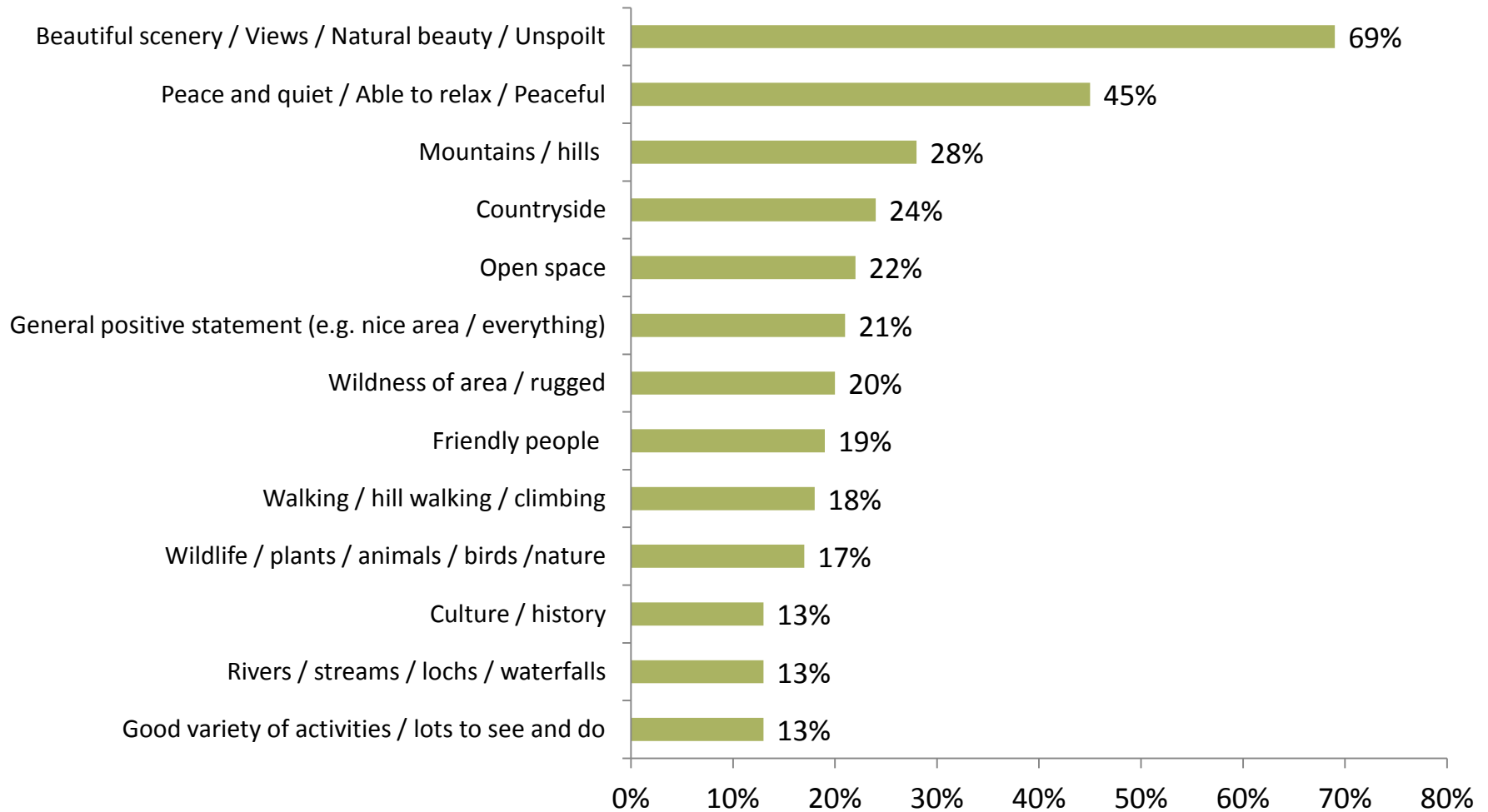
Almost all visitors rate their overall visit with 8, 9 or 10 out of 10 → very high satisfaction rating!

Likelihood to visit again



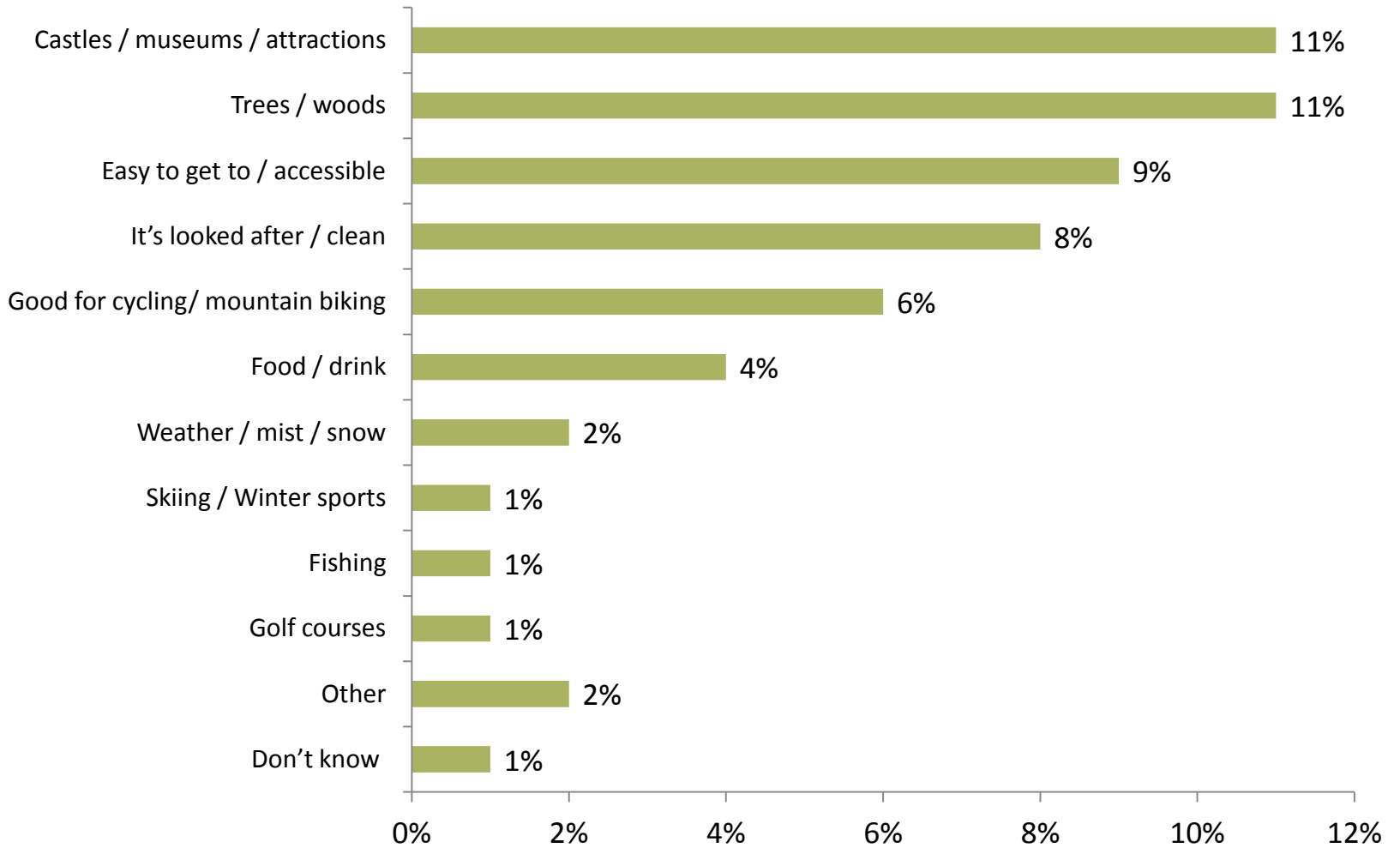
Those living close to Cairngorms most likely to return – but even overseas visitors plan to come back (48% very likely; 33% quite likely)

Enjoyed Most (1)

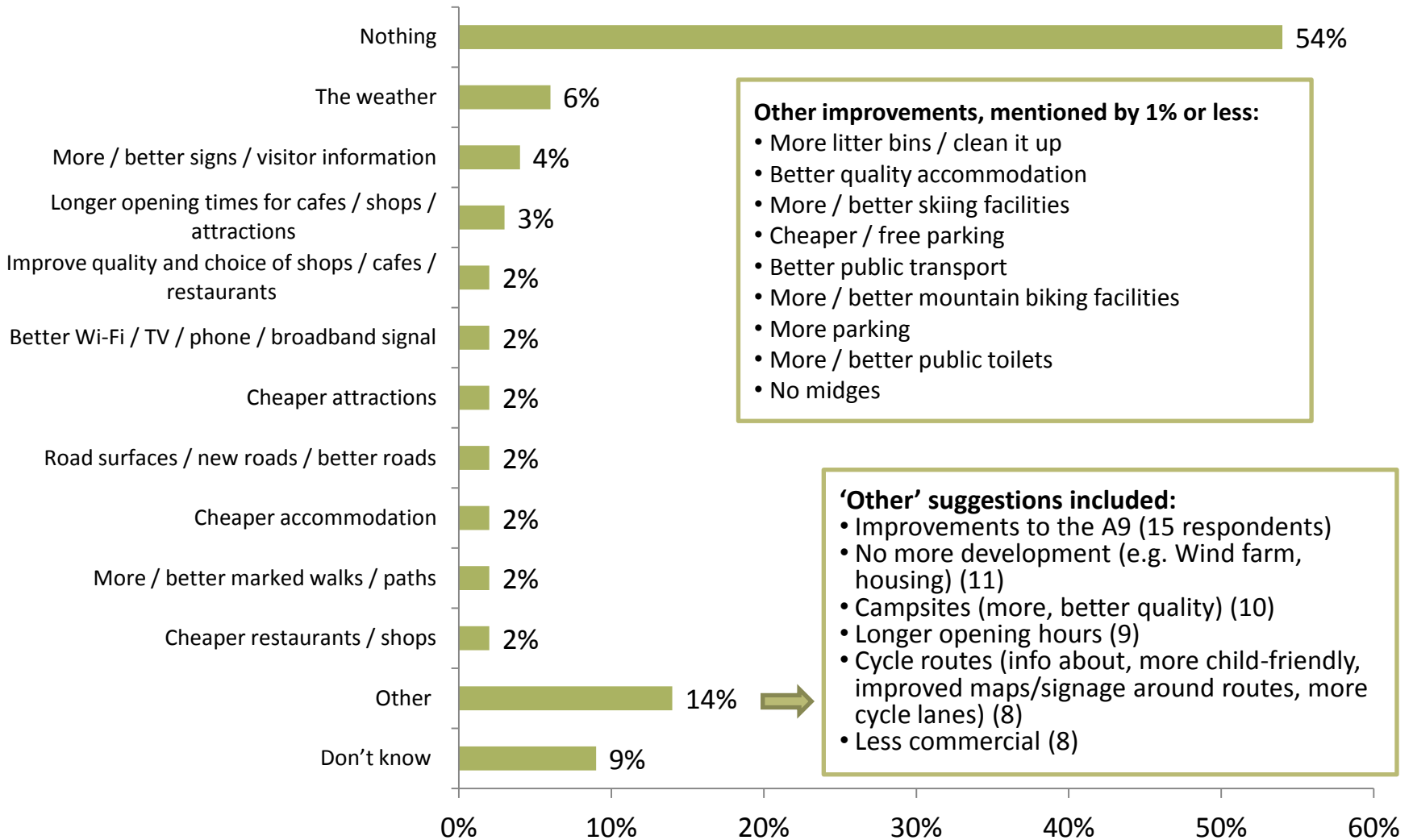


Confirms reasons for visiting → scenery, peace, tranquillity, outdoors, nature

Enjoyed Most (2)



Suggestions for Improvement



Summary: perceptions of the National Park

- Perceptions of the National Park are very positive, with a majority agreeing with statements such as ‘I enjoyed my visit and would recommend to friends’ and ‘I love this place’ – and 95% of respondents agreed that the National Park seems well managed and cared for.
- Ratings of facilities and customer service were also generally high, and all visitors groups gave ratings of their overall visit of at least 8.5 out of 10 (the average score overall was 8.87).
- 71% of visitors said they were ‘very likely’ to visit again, and a further 21% said they were ‘likely’ to come back.
- The most enjoyed aspects of the visit were the beautiful scenery / views and the peaceful / relaxing nature of the area.
- Over half of respondents (54%) could not think of anything that would have improved their visit and very small percentages mentioned any individual improvements.

Expenditure in the Cairngorms area

Spend in Cairngorms

| | Total | Resident | Day tripper | Short break | Longer break |
|---------------------------------|---------------|---------------|---------------|---------------|----------------|
| Accommodation | £69.30 | - | - | £50.60 | £101.80 |
| Food and drink elsewhere | £11.10 | £6.90 | £6.20 | £9.80 | £13.40 |
| Entertainment | £4.30 | £0.80 | £2.30 | £3.00 | £5.70 |
| Tourist shopping | £6.60 | £1.30 | £2.70 | £3.50 | £9.40 |
| Transport within the area | £3.20 | £2.10 | £2.00 | £2.60 | £3.80 |
| Miscellaneous/other expenditure | £1.20 | £0.20 | £0.30 | £1.20 | £1.50 |
| Total | £95.80 | £11.20 | £13.50 | £70.80 | £135.60 |

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

Conclusions

Conclusions

- The key drivers of visits to the Cairngorms area are: the beautiful scenery and countryside, the peace and quiet / relaxation, having visited before, and the opportunity to go hill walking.
- For those who seek information before their trip, the internet is a crucial information source, with the Cairngorms site and VisitScotland websites being mentioned frequently. Visitor Information Centres are important information sources for a significant minority of respondents during their visit to the area.
- For overnight visitors, longer trips of 5+ nights are common, although the average length of stay in the Cairngorms area itself is 4.4. Most stay in self-catering accommodation, in hotels, or camping.
- The most popular activities mentioned by visitors during their trip to the Cairngorms were general sightseeing, low level walking, visiting attractions and eating out. Commonly mentioned attractions were Balmoral Castle, Landmark Forest Heritage park and Glenlivet Distillery.
- When asked about their expectations prior to visiting and their experiences now they are in the area, visitors report that their expectations are being exceeded, which suggests the prospects for repeat visits are good (indeed, a majority say they are likely or very likely to visit again).

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