

Tourism and Future National Parks in Scotland

How more National Parks could grow
the visitor economy of Scotland



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A paper reviewing how more National Parks in Scotland could assist the development of the visitor economy.

Author : Graham C. Barrow BA(Hons) MSc MPhil
for the Scottish Campaign for National Parks (SCNP)
and the Association for the Protection of Rural Scotland
(APRS).



APRS

1. Introduction

1.1 This is the third topic report to be published by the Scottish Campaign for National Parks (SCNP) and the Association for the Protection of Rural Scotland (APRS) and has been drafted by Graham Barrow with input from staff of the APRS and board members of the SCNP. It builds upon from the Unfinished Business – a National Parks Strategy for Scotland report published in 2013 by SCNP/APRS. That strategy document put the case for the designation of at least seven more National Parks in Scotland (see appendix 1, *National Parks recommended by SCNP and APRS 2013*) to complement the existing two and it stated that...

“National Park status can attract more visitors, increase the average spend per visitor and lengthen the season, thereby increasing tourism-related employment and sustaining small-scale tourism businesses. National Parks tend to attract greater levels of inward investment, particularly for tourism, for outdoor recreation providers and for leisure developments.”

1.2 This paper explores the above statement with examples drawn from throughout the UK and internationally. A number of countries around the world have demonstrated that a good National Park system can be a major draw for tourists, increasing the number of visitors and helping the economy throughout the country, as well as in the local area of each park. Notable National Park systems that have shown this are for example in the United States, Canada, Australia and New Zealand, as well as in a number of less affluent countries such as Chile, Kenya and South Africa. Relatively small nations where the tourism economy has benefitted from having good National Park systems include Iceland, Malawi, Bhutan, Slovakia, Belize and Wales.

1.3 There have been a number of studies of the economic impact of tourism in the National Parks of the United Kingdom, such as *Valuing Wales’ National Parks (2013)* and *Valuing England’s National Parks (2013)*. In Scotland both of our existing two National Parks, which are now some 12 years old, have described the positive contribution that tourism makes to their local areas – for example, Loch Lomond and the Trossachs National Park – *Valuing the National Park (2011)*.

1.4 Wales has some geo-political similarities to Scotland within the UK and has three National Parks and four Areas of Outstanding Natural Beauty. A recent study has shown that the three Welsh National Parks attract around 12 million visits per annum and some £1billion pa of spending. A study calculated that £557 million per annum was added to the Welsh economy as a direct result of the presence of the National Parks with average visitor spend per head per day of £87. This was considerably higher than the UK average of £60 per day, primarily due to the longer overnight stays. There were almost 30,000 jobs located in the three Welsh National Parks and over 5,000 businesses, many of them tourism related.



Lake Tekapo National Park – New Zealand



Australia's Great Barrier Reef

1.5 Whilst these research reports and others demonstrate that recreation and tourism are very important to the economy of National Park areas and support significant numbers of jobs, they do not address the illusive issue of how much of this positive impact is the result of the National Park designation and how much would have occurred anyway in an area of fine landscape, potentially attractive to visitors. How much does the designation of a new National Parks assist in the growth of the local tourism economy? This is a difficult question to answer without pre and post-designation data and this is almost universally lacking. But there is qualitative and anecdotal evidence which together indicate that National Parks do offer a very significant benefit to tourism, although this possibly varies greatly between the different types of National Park around the world. We review some of this evidence below.

1.6 Scotland's Tourism Strategy 2020 published by The Scottish Tourism Alliance in 2012 reports that Scotland's tourism industry supports an estimated 200,000 jobs in 20,000 businesses, many of which are in rural areas. It states that Scotland has four major appeals with "nature, heritage and activities" being one.

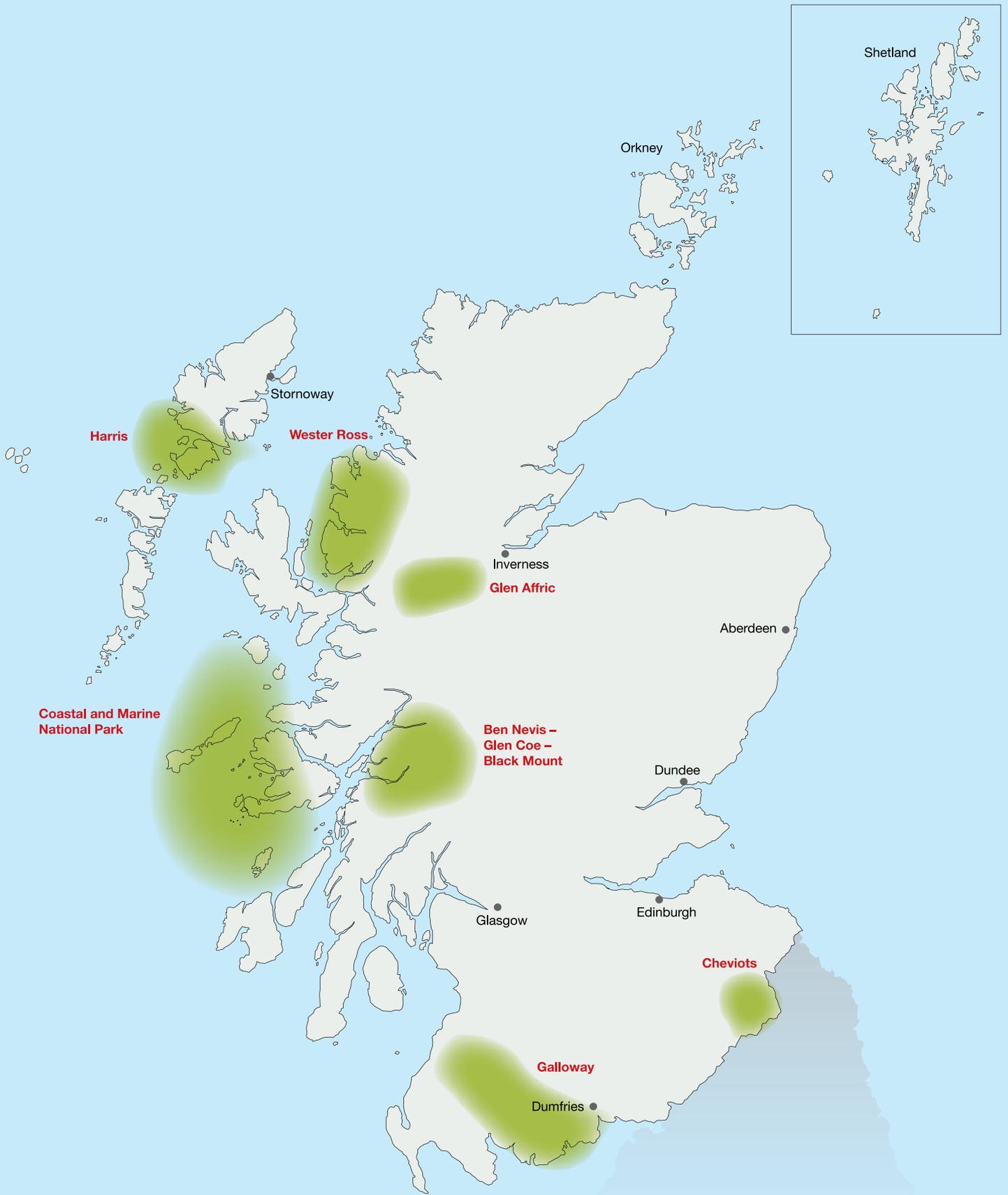
"With dramatic landscapes and seascapes, a rich and colourful history, and vibrant culture, Scotland serves as a truly unique backdrop for holidays and short breaks, offering visitors a wealth of things to see and do: golf, walking, wildlife-watching, adventure sports, visiting castles and historical sites, to name just a few.

In many of our rural destinations meanwhile, where tourism is often the mainstay of the local economy, businesses and industry groups are also working together to grow the value of tourism in their areas by making more of assets such as walking and cycling, adventure tourism, food and drink, and local history and culture."

Scotland's Tourism Strategy 2020.

1.7 Scotland's existing two National Parks, located in some of the most iconic areas of the country – the Cairngorms and Loch Lomond and The Trossachs – coupled with the designation of additional National Parks embracing more of Scotland's world class landscapes, can play a very important role in helping to achieve the national tourism growth targets. This is particularly the case in attracting visitors from priority international markets where the existence of a strong National Park system is known to be a key motivator in the decision to visit specific countries.





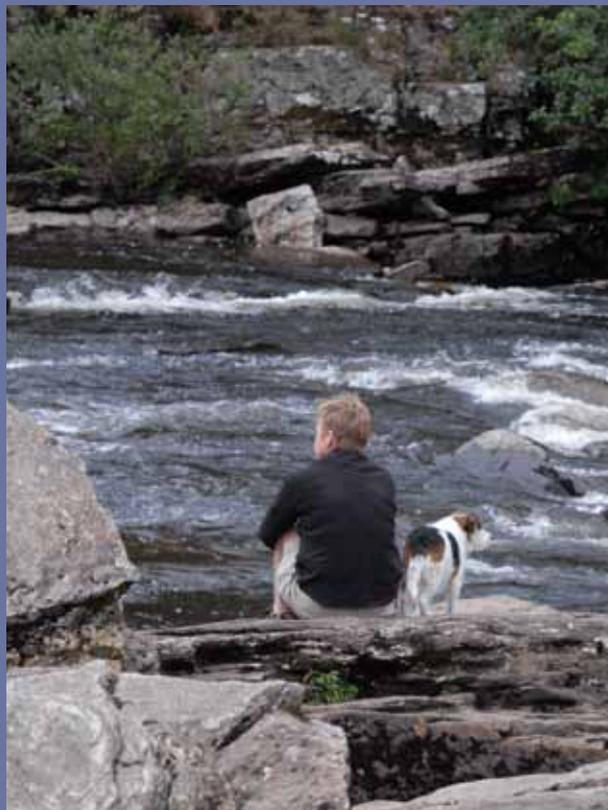
National Parks recommended by SCNP and APRS 2013

Map reproduced by permission of Ordnance Survey, licence number 100053751.
 * For layout purposes the Shetland Islands are not shown in the correct geographical position.

2. Motivations for tourists to visit the UK and Scotland

- 2.1 The UK and Scotland in particular has a strong positive image for its countryside and landscapes. Visit Britain research in 2011 showed that 18% of all visits and 22% of holiday visits were made to the countryside, accounting for over £4 billion of spending per annum. Research about what visitors are potentially interested in doing in Britain revealed that over 60% of visitors were interested in visiting the countryside – high up on a list of potential activities.
- 2.2 Research in Scotland by Visit Scotland (2012) showed that the most frequently stated motivator for visiting Scotland, mentioned by 58% of respondents, was to see the scenery/landscape and the second, mentioned by 31%, was to learn more about the history/culture of Scotland.
- 2.3 This research shows that there is a large percentage of international tourists to the UK that wish to visit the countryside and the recent visitor research undertaken in National Parks confirms that they attract high volumes of overseas visitors. A review of tour company promotional material also confirms that National Parks feature prominently in UK highlights tour programmes. This is clear evidence that those areas promoted and labelled as National Parks are playing an important role in attracting overseas visitors.

60% of visitors were interested in visiting the countryside ...



Falls of Dochart – Killin

58% to see the scenery and landscape ... 31% to learn more about the history and culture of Scotland



City of Edinburgh

3. Recognition of the National Park brand

- 3.1 The label “National Park” is probably the most internationally well-known countryside protection designation in the world, made famous by the universally acclaimed North American National Parks and reinforced by countries around the world that have applied the concept in various forms.
- 3.2 In 2012 the UK Association of National Park Authorities published a report on the public’s awareness and opinions about the UK National Parks. It was based on over 1,800 telephone interviews conducted in October and November 2011 with adults over 16 years of age throughout the UK. This showed that:
- 90% of people had heard of the term “National Park”, although one third of the people could not name any in the UK
 - 89% thought that National Parks were important to them
 - 93% agreed that they were a countryside area of national importance
 - 85% of people thought that National Parks were places that encouraged public recreation
 - 65% of those interviewed had visited a National Park in the last year with 30% having visited three or more times.
- 3.3 Research on public attitudes shows that the UK National Parks have, since the first were declared in the late 1950s, established themselves in the consciousness of the British public and are understood to be areas that are ‘open for business’ with regard to visitors.
- 3.4 It is generally understood that foreign visitors to the UK, especially from those countries with well established National Park systems of their own such as from North America, Australia, New Zealand and Scandinavia actively seek out National Parks as they recognise that they are of international scenic interest. These international visitors are often at the top end of the spending range of foreign tourists to the UK.
- 3.5 The Cairngorms National Park Authority carries out a regular annual survey of over 400 businesses in the National Park – the Cairngorms Business Barometer. Using a rating scale from 1 to 10, where 1 was ‘not at all influential’ and 10 was ‘very influential’, businesses were asked to rate the influence of the National Park in terms of attracting first and repeat customers and in relation to its perceived impact on their business operations and profitability. For the past 4 years businesses have given an average rating of over 6 for the positive influence of the National Park in attracting first time customers.

4. A promotional tool for National Tourist Boards

4.1 A survey of a number of the national tourism websites shows how some countries use their National Parks to promote the attractiveness of the country to potential tourists. Here are five examples:

Destination Canada has an opening website page with images from a number of the Canadian National Parks with the phrase: *“From coast to coast Canada is filled with unexpected wonders that are sure to awaken your inner explorer.”* An interactive map links the reader to each Province where the National Parks are clearly marked.

New Zealand uses the phrase *“100% Pure New Zealand”* and its website links easily to a destinations map where 14 National Parks are marked. Information on each National Park is provided.

Visit Chile has a vibrant website in three languages and focuses on a range of attractive destinations. The Torres del Paine and Natales National Parks and the Laguna San Rafael National Park are prominent in the promotion of the country.

Kenya uses the phrase *“Magical Kenya”* and under *“explore places to visit”* it introduces the country with... *“White Sandy beaches on the East African coast, more than 45 National Parks and Reserves, not to mention bustling metropolitan cities and towns”*

Visit Britain’s website’s opening page has *“Discover Britain’s Countryside”* and this links to a page entitled *‘Love Countryside’* with our 15 National Parks listed. The **Visit Scotland** website though does not give strong prominence to our two National Parks although they are listed under a link to *“Nature and Geography”*.

4.2 It is clear that some countries use their National Parks as a key component of their marketing offer. There is a substantial international interest in seeing National Parks by tourists from around the world (particularly for high spending visitors from North America and Europe) and Scotland could be using this marketing tool by developing and promoting a system of National Parks throughout the country.

5. Developing a National Parks system

5.1 Having a significant system of National Parks has greater impact and helps to create an ‘economy of scale’ to attract visitors who value the outdoors whether it is for gentle recreation or adventure style activities.

5.2 Some countries have only a small number of National Parks and in this case cannot use them to strongly promote inbound tourism. Many countries though have designated a range of National Parks and manage a coordinated parks system. Below is a list of a selection of countries where tourism is a very important part of their national economy showing the number of National Parks that have been declared.

Table 1

Country	Number of National Parks
Morocco	10
South Africa	19
Tanzania	16
Japan	29
Thailand	138
Turkey	41
Austria	7
Greece	10
Italy	24
Norway	36
Spain	14
Canada	43
Mexico	67
Chile	36
New Zealand	14

5.3 There is great potential for Scotland to use its existing National Parks as a stronger promotional tool with priority international markets. However, the international marketing effort would benefit greatly from an increase in the number of National Parks as this could contribute significantly to achieving growth targets and help spread the economic benefits more widely to some of the more fragile rural parts of Scotland.

5.4 A study “Recreation and Tourism – socio-cultural and socio-economic impacts on protected areas in Norway” by Knut Bjørn Stokke, Kristian Bjørnstad, Morten Clemetsen, Jan Vidar Haukeland in 2011 reported that:

1. National Parks have a great appeal to foreign tourists in Norway

A survey among German, Danish and Dutch motor tourists in the summer of 2008 demonstrated that 50% of the respondents maintained that the National Parks have a ‘very great appeal’ and 28% said that the Parks had (to a larger or smaller degree) influenced their decision to visit the country.

2. The economic impact is significant

A study in the Nord Gudbrandsdalen National Park area in southern Norway, revealed that 25% of Norwegian tourists’ expenditure in the area could be directly attributed to the NP status of the local mountains and 40% of foreign tourists’ expenditure is explained by the NP status.

3. Local residents acknowledge the significance of NP tourism

It was showed in the same survey that 90 per cent of the local people deemed the importance of NP tourism as ‘rather’ or ‘very high’ for income/ jobs in their local communities and 80 per cent saw the importance of NP tourism as ‘rather’ or ‘very high’ for the level of services/ infrastructure in their local communities.

6. Attracting visitors to otherwise lesser known places

6.1 SCNP/APRS (2015) have in their first topic paper on National Parks explored the positive economic impact that establishing National Parks in remote locations can have, showing the impact on local economies of relatively remote National Parks in countries such as Norway, Australia and New Zealand.

“National Parks attract large numbers of relatively wealthy domestic and international tourists to relatively remote rural areas. Many National Parks attract significant numbers of customers to the “product”... These relatively wealthy consumers attracted by nature based tourism constitute a potential market for tourism products based on natural resources and local culture.”

Luck and Kirstges (2003).

6.2 *“The declaration of National Parks in remote or lesser known rural areas can have a significant impact on visitor numbers to those areas. For example, in Kakadu National Park, in remote northern Australia, which was declared in three stages between 1979 and 1991, there are now thousands of visitors during the peak visitor season. 30 years ago, before the first part of the park was declared, only a handful of people visited the area annually. In the early years of the National Park visitor numbers grew from 46,000 in 1982 to 211,000 by 1991, with tourism spending reaching \$35 million p.a. by that time. Visitor numbers have been maintained at that level since then and the park is acknowledged as making a major contribution to tourism in the Northern Territories with its impact spreading over a wide area, including the small city of Darwin.”*

P. Tremblay (2007).

6.3 In Scotland, in some relatively remote locations, groups of local residents, particularly those with interests in the tourism industry, have been arguing that National Park status would be of assistance to their areas. Recent examples of this are on the Isle of Harris in the Western Isles, on the Isle of Mull, in Galloway and in the Cheviot Hills in the Borders. SCNP/APRS have been approached by groups in each of those areas seeking advice and assistance about how they could progress the designation of a new National Park.

7. Tourism can help sustain local services

7.1 It is well documented and understood that visitors in rural areas can make a significant contribution to sustaining local services. The increased expenditure in local shops, on rural transport and in restaurants and cafes can help sustain these services for local people. The spending by visitors on local crafts can also preserve and attract craft industries and help maintain the rural population. Specialist trip and wildlife viewing companies can also get established in areas where visitor numbers are sufficiently high.

7.2 In Australia for example a research report in 2004 showed how important the expenditure of tourists was to sustaining rural communities in four National Parks in Queensland.

“National Parks and other protected areas traditionally have been created and funded to provide conservation benefits. However, they also provide rural and regional economic benefits stemming from the jobs created both by management agency expenditure and by the spending of visitors who come to the parks. This contribution can be particularly important given that many communities in rural Australia have suffered declines in traditional resource-based industries like agriculture and forestry. Moreover, by contributing to rural economies, parks can promote community and industry support for the conservation of natural and cultural resources.”

K. Lindberg and J. N. Denstadli (2004).

7.3 Spending in the Queensland parks was primarily on accommodation, food and drink, specific tourist trips and in shops. The study concluded that approximately 50% of this spending was induced by the existence of the park – this being estimated by the results of a questionnaire that indicated that half the visitors would not have come if the area was not a National Park.

7.4 A study in 2006, funded by the New Zealand Conservation Board of Fiordland National Park in New Zealand, showed conclusively that it made a vital contribution to the sub-regional economy. Some of the main results of the research are summarised in points a. – d.

a. The Park attracts around 33,000 overnight visitors and 560,000 day visitors per year with about 80 per cent of these from overseas. On

average, day visitors to the Park say that they spend 1.3 nights more in the Queenstown Lakes District – Southland Region (including the Park) than they would in the absence of the Park. Overnight visitors to the Park spend an additional 3.8 nights in the region.

- b. The spending of visitors during their additional stay in the region plus the spending by the Department of Conservation in managing the Park generates direct and flow-on (multiplier) economic activity in the region. As a result of the Park, total regional economic output in 2005 increased by \$196 million beyond what it would otherwise have been. Associated with this increased output was regional income (value added) of \$78 million, including \$55 million of household income and 1,600 jobs.
- c. 10% of the overseas visitors to the park said that in the absence of the Park they would stay a shorter time in NZ and a further 12% said that they would not come to New Zealand at all. Foreign overnight visitors to the Park said that they would stay an average of 2.8 nights less in New Zealand while foreign day visitors to the Park said that they would stay an average of 1.6 nights less in New Zealand.
- d. The spending of visitors during their additional stay in New Zealand generates direct and flow-on (multiplier) economic activity in the region. As a result of the Park, total national economic output in 2005 increased by \$228 million beyond what it would otherwise have been. Associated with this increased output was national income (value added) of \$103million, including \$68 million of household income and 1,755 jobs.
- 7.5 In Scotland there are many remoter communities which would benefit greatly from an increase in tourism numbers and spending, even in modest proportion. If new National Parks can draw additional visitors to locations such as Mull, Coll, Tiree and Colonsay in Argyll, to the Western Isles or to the lesser known small towns in Galloway, such as Newton Stewart and Gatehouse of Fleet, then they can make a significant contribution to sustaining rural services in those and other locations in need of rural development.

8. Conclusions

- 8.1 Tourism and National Parks are natural partners and this is demonstrated around the world with the use of well-developed National Parks systems being applied very effectively for the marketing of countries, attracting more visitors and increased spending.
- 8.2 National Parks can attract more visitors and their spending and therefore assist with the development of sustainable tourism within a National Park management framework. This has much to offer the economies of some remoter rural areas in Scotland.
- 8.3 At present Scotland has not developed an extensive National Parks system and as a consequence is not able to fully capitalise on the opportunity to use this to attract more tourists to the country and more visits and holidaymakers to some of our remoter areas in particular. Scotland is therefore at a distinct competitive disadvantage compared with some other countries.



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If you would like further information on the activities of the Scottish Campaign for National Parks please contact:

John Thomson – Secretary

email thomsonhughes@btinternet.com

or visit the website www.scnp.org.uk

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For information on the activities of the Association for the Protection of Rural Scotland please contact:

John Mayhew – Director

email info@ruralscotland.org

or visit the website www.aprs.scot