

Annex 2: A summary of the Visitor and Business Context

1. There were an estimated 1.77 million visitors to the Cairngorms National Park in 2016 according to the latest STEAM report, with 3.91 million visitor days and direct expenditure of £203 million. It is estimated that there were 930,000 day visitors (52%) and 840,000 staying visitors (48%). Total visitor numbers have increased by 13.4% between 2009-2016 and direct expenditure has increased by 16% in the same period (adjusted for inflation).
2. Tourism is the largest industry in the National Park, accounting for around 29% of GVA, and 43% of employment.
3. There is no definitive data on the number of tourism businesses in the Cairngorms National Park. However, STEAM bedstock figures show an estimated 900 accommodation providers and the Cairngorms Business Partnership's website lists 56 visitor attractions, 91 restaurants and 98 shops. There is also a significant number of microbusiness who are not incorporated or registered for VAT. Current membership of the Cairngorms Business Partnership is over 380 businesses. The CBP estimates that there are around 1200 active businesses in the National Park and so their membership penetration is over 30%. For comparison, a typical Chamber of Commerce would aspire to include around 10% of registered businesses.
4. The most recent visitor survey, carried out in 2014/15 indicates that 25% of staying visitors were accommodated in hotels, 17% in Guest houses or B&Bs, 19% were camping or caravanning and 32% self-catering. 65% of staying visitors were staying for a longer break of at least five nights.
5. According to the visitor survey, average trip expenditure per person for day visitors is £13.90 for local residents and £15.50 for other day visitors. Average expenditure per person among staying visitors is £74.70 for people on a short break and £129.90 for those on a longer break.
6. The main reason for choosing to visit the Cairngorms National Park as a destination is for the scenery and countryside. During the visit the top activity undertaken is 'General sightseeing /just relaxing' (56%). For those who are more active, the top activity is low-level walking (44%) but there has been a notable increase in those cycling as well (13%, up from 5% previously).
7. When asked what they like most about the Cairngorms area the top responses were 'Beautiful scenery/views/natural beauty/unspoilt' (65%), 'Peace and quiet/able to relax/peaceful' (38%), 'Mountains & Hills' (28%).
8. When asked to rate a range of facilities, the condition of paths and tracks was particularly appreciated by visitors, with 94% of respondents rating this as 'good' or 'very good', up from 79% five years previously. There was also strong agreement that 'The Park seems well-managed and cared for' with 97% agreeing or agreeing strongly, up from 88% 5 years previously. 49% agreed or agreed strongly with the statement "I would consider donating a little time or money to help local conservation projects".