Cairngorms National Park

STEAM Tourism Economic Impacts
2014 Report
Narrative Summary

Cairngorms National Park's Visitor Economy 2014

This is a summary of the tourism trends research undertaken for Cairngorms National Park by Global Tourism Solutions (UK) Ltd.

1.68 million Tourism Visits to the national park area in 2014 **up 2.5% on the previous year**

859,000 visits were made by visitors **staying in the park** as part of a holiday or short break **up 20.2% since 2009**, generating **2.9 million nights** in accommodation across the area

3.7 million Visitor Days and Nights generated by **staying** and **day visitors** to the park in **2014**

£244 million was generated within the local economy through visitor and tourism business expenditure, **an increase of 9.5% on the previous year**

818,000 visits made by **Day Visitors** to the area in 2014

Day Visits generated **£35 million** for the economy of the park in 2014

On average, visitors **staying** in the park stay **3.4 nights** in the region and spend **£71.6 million** on local accommodation, up **18.5% since 2009**

Visitors to **the park** are vital to local businesses, supporting more than **5,477 full time equivalent jobs, up 6.6% on 2009**

Staying visitors generate a **total economic impact of £209 million** for businesses in the park

Economic Impact increased by 13.3% between 2009 and 2014

Total Visitor Numbers increased by 6.8% between 2009 and 2014

Total Visitor Day and Nights increased by 18.6% between 2009 and 2014

2009 2014

Visitor Types

Staying Visitors encompass all tourists staying overnight for at least one night in one of the following types of accommodation:

- **Serviced Accommodation** - including Hotels, Guest Houses, B&Bs, Inns
- **Non-Serviced Accommodation** – including Self-Catering properties such as Houses, Cottages, Chalets and Flats, as well as Camping and Caravanning, Hostels and University / College accommodation
- **Staying with Friends and Relatives (SFR)** – unpaid overnight accommodation with local residents

Day Visitors visiting the area on a non-routine and non-regular leisure day trip from a home or holiday base

Staying Visitors
51% of Visits

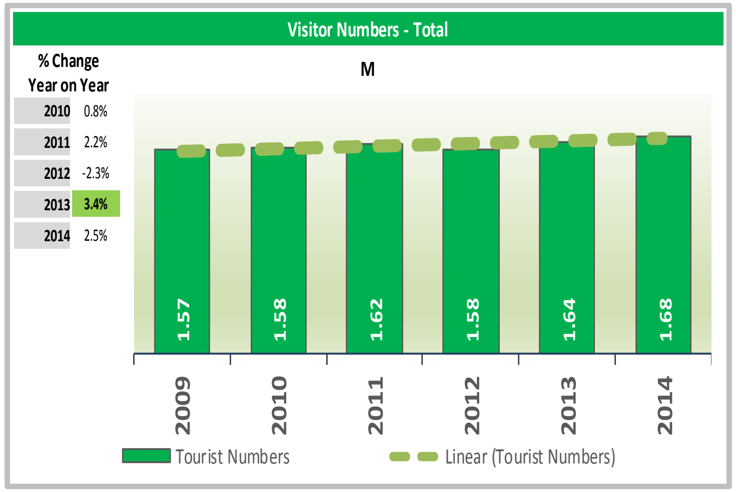
Day Visitors
49% of Visits

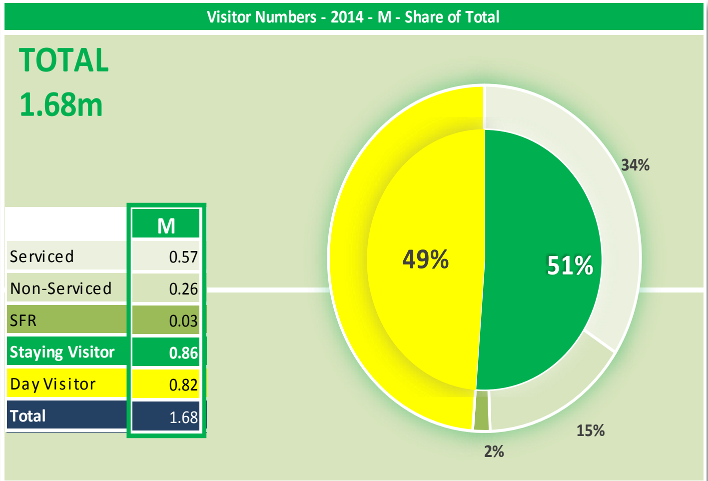
Total Visitor Numbers
1.68m

Visitor Numbers

In 2014, there were an estimated 1,677,000 tourism visits to the park; representing an increase of 2.5% on the previous year. Overall, 51% of all visitors (859,000) stayed in the area for one or more nights, a percentage that has increased from 45% over the past six years indicating that more visitors are opting to stay in accommodation; the remaining 49% of visitors (587,870) are Day Visitors to the park.

Within the staying visitors sector, those staying in serviced accommodation represent the majority of staying visitors at 34%, followed by those staying in non-serviced accommodation (15%). This masks the fact that **the non-serviced accommodation sector increased by 18% over the previous year and by 35% since 2009, pointing to strong growth in weekly rentals over the past six years.**





Key Figures: Visitor Numbers

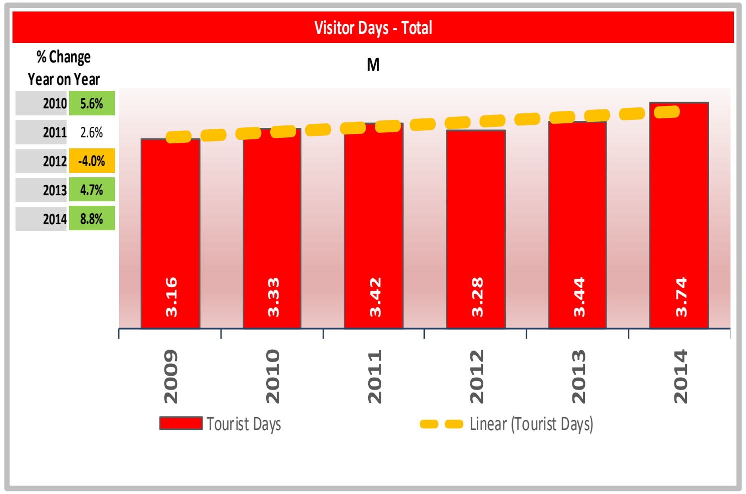
Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2014	**M**	**.573**	**.256**	**.030**	**.859**	**.818**	**1.677**
2013	M	.564	.217	.029	.809	.826	1.636
Change 13/14	**%**	**1.6**	**18.0**	**5.1**	**6.1**	**-1.0**	**2.5**

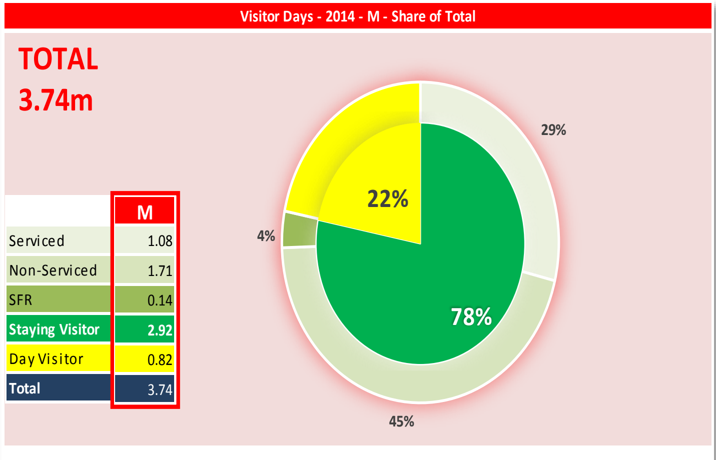
Total Visitor Days

3.74m

Visitor Days

Visitor Days take into account those visitors who stay at any destination for more than a day. For example, if a family of five stay three nights, they will account for five visitors, and fifteen visitor days. **Visitors to the Cairngorms National Park area spent an estimated 3,743,000 days in the area as part of a tourism day trip, holiday or short break in 2014; this represents an increase of 8.8% on the previous year and an 18.6% increase since 2009.**





Staying visitors account for over three-quarters (78%) of all visitor days. **There has been a sizeable increase (+47.9%) of non-serviced sector use over the past six years.** The average length of stay by all staying visitors to the park was 3.4 days; non-serviced accommodation stands at 6.7 days indicating a high rate of weekly rentals.

Key Figures: Visitor Days

Visitor Days		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2014	**M**	**1.079**	**1.708**	**.137**	**2.924**	**.818**	**3.743**
2013	M	1.070	1.412	.131	2.613	.826	3.440
Change 13/14	**%**	**0.9**	**20.9**	**4.9**	**11.9**	**-1.0**	**8.8**

Average length of stay in days for different visitor types to Cairngorms National Park 2014

Day Visitors	All Visitors	Serviced Accommodation	Non-Serviced Accommodation	Staying with Friends/Relatives	All Staying Visitors
1	2.2	1.9	6.7	4.6	3.4

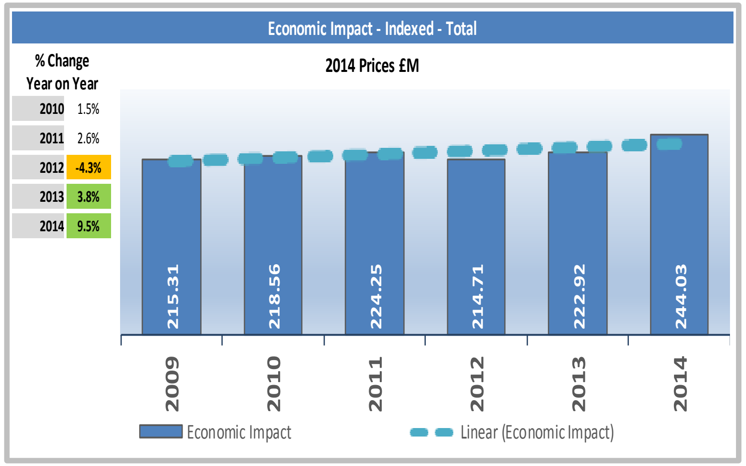
Total Economic Impact

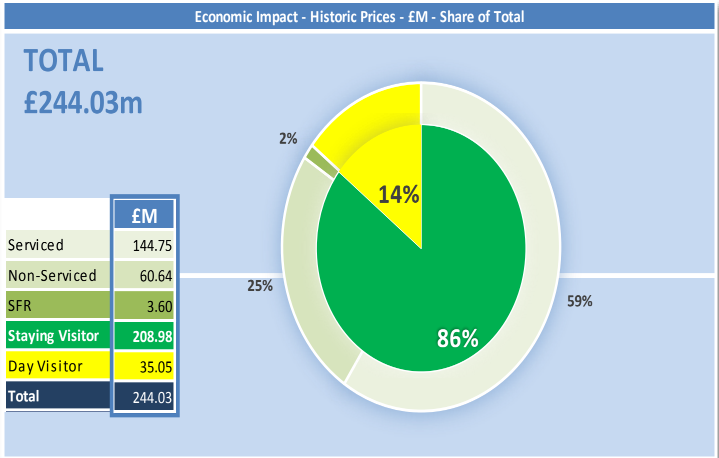
£244.03m

Economic Impact

Tourism visits to the Cairngorms National Park area in 2014 generated a total economic impact of £244,030,000, an increase of 9.5% on the previous year and 13.3% over the past six years. The total economic impact in 2014 comprises the expenditure of visitors on goods and services, totalling £196m, and the *indirect* and *induced* economic effects of local businesses and residents spending tourism revenues locally, accounting for a further £48m. In 2009 the economic impact was £215m (all 2009 monetary figures in this narrative report are indexed (1.203) to allow direct comparison with 2014 figures). **Mirroring increases in visitor numbers and days, the greatest gain in economic impact over the past six years took place within the non-serviced sector, which increased by 38.9%.**

Despite this, the serviced accommodation sector generates the most (59%) economic impact followed by the non-serviced accommodation sector and Day Visitors.





Key Figures: Economic Impact

Economic Impact		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2014	**£m**	**144.75**	**60.64**	**3.599**	**208.98**	**35.05**	**244.03**
2013	£m	132.59	46.40	3.340	182.33	34.59	216.92
Change 13/14	**%**	**9.2**	**30.7**	**7.7**	**14.6**	**1.3**	**12.5**

Average economic impact generated per person by each type of visitor in 2014

Day Visitors
£42.85 per Day

Staying with Friends and Relatives
£26.27 per Day
£120.84 per Visit

All Visitors
£65.20 per Day
£143.44 per Visit

Non-Serviced Accommodation
£35.50 per Day
£237.85 per Visit

All Staying Visitors
£71.47 per Day
£243.00 per Visit

Serviced Accommodation
£134.15 per Day
£254.86 per Visit

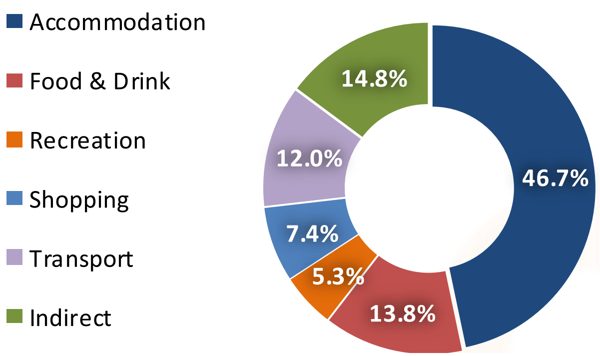
Total FTEs Supported in 2014	Definitions:
5,477	• **Accommodation:** Payments for overnight stays in accommodation, such as room rates for serviced accommodation, or pitch fees and hire charges for non-serviced accommodation. • **Recreation:** Covering expenditure on a wide range of leisure activities such as museum, event, concert / theatre and attractions attendance as well as sports participation and spectating. • **Transport:** Expenditure within the destination on travel, including fuel and public transport tickets. • **Food and Drink:** Spend on eating and drinking at restaurants, cafes and other venues, takeaway food, snacks and groceries. • **Shopping:** What visitors spend on items including clothing / jewellery, household items, music / films / games, gifts and smaller items, books and maps, plants and garden items. • **Indirect:** The expenditure by local tourism businesses within the local supply chain.

Employment Supported by Tourism

The expenditure and activity of visitors to the Cairngorms National Park in 2014 supported a total of 5,477 Full-Time Equivalent jobs (FTEs); this represents an increase of 6.6%, or 338 FTE jobs within the tourism sector within the past six years, with most gains being seen within the transport, accommodation and food & drink sub-categories. Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 4,665 FTEs in 2014, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 812 FTEs. **The three largest sectors for direct employment were Accommodation (2,558 FTEs); followed by Food & Drink (753 FTEs); and then Transport (657 FTEs).**

Employment Supported by Tourism 2009-2014: Full-Time Equivalents (FTEs) by Type

Sectors	Sectoral Distribution of Employment - FTEs		
	2014	2009	+/- %
Accommodation	2,558	2,401	6.5%
Food & Drink	753	712	5.8%
Recreation	291	280	4.2%
Shopping	405	383	5.7%
Transport	657	609	8.0%
TOTAL DIRECT	4,665	4,385	6.4%
Indirect	812	754	7.7%
TOTAL	5,477	5,139	6.6%



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2016

STEAM FINAL TREND REPORT FOR 2009-2014

CAIRNGORMS NATIONAL PARK

Comparing 2014 and 2013

2013 in 2014 prices (1.028)

COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2014 & 2013 - INDEXED TO 2014

KEY

- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

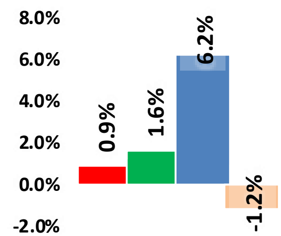
		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2014	2013	+/- %	2014	2013	+/- %	2014	2013	+/- %	2014	2013	+/- %	2014	2013	+/- %	2014	2013	+/- %
Visitor Days	M	1.079	1.070	0.9%	1.708	1.412	20.9%	0.137	0.131	4.9%	2.924	2.613	11.9%	0.818	0.826	-1.0%	3.743	3.440	8.8%
Visitor Numbers	M	0.573	0.564	1.6%	0.256	0.217	18.0%	0.030	0.029	5.1%	0.859	0.809	6.1%	0.818	0.826	-1.0%	1.677	1.636	2.5%
Direct Expenditure	£M																196.31	178.99	9.7%
Economic Impact	£M	144.75	136.26	6.2%	60.64	47.68	27.2%	3.599	3.432	4.8%	208.98	187.38	11.5%	35.05	35.54	-1.4%	244.03	222.92	9.5%
Direct Employment	FTEs	2,745	2,779	-1.2%	1,391	1,180	17.9%	49	47	4.8%	4,186	4,006	4.5%	479	486	-1.4%	4,665	4,492	3.9%
Total Employment	FTEs																5,477	5,240	4.5%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2014 & 2013 - INDEXED TO 2014

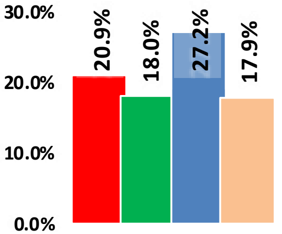
KEY

- Visitor Days
- Visitor Numbers
- Total Economic Impact
- Direct Employment

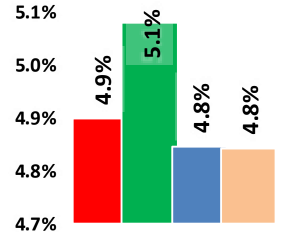
Serviced



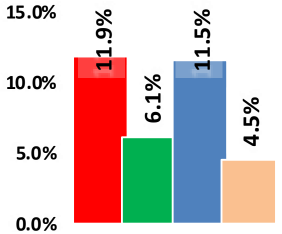
Non-Serviced



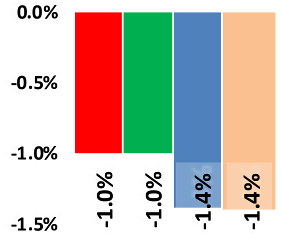
SFR



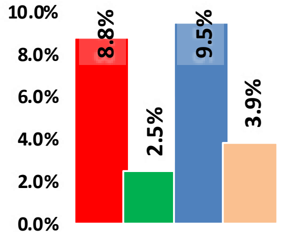
All Staying Visitors



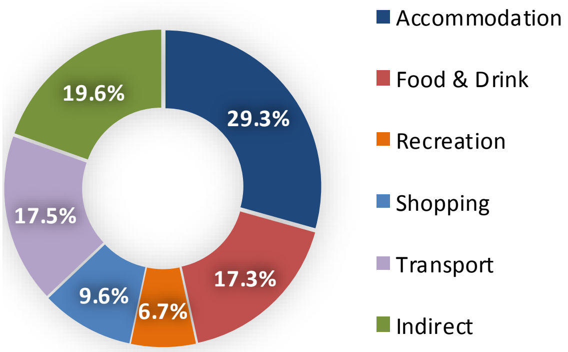
Day Visitors



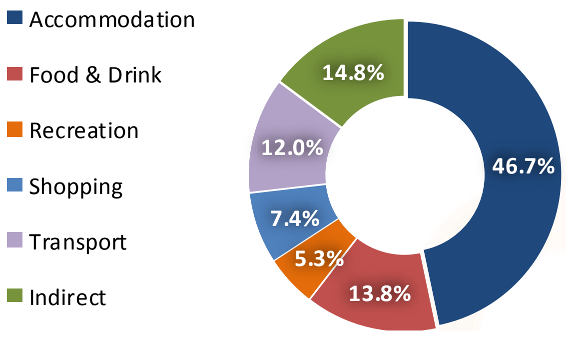
All Visitor Types



Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2014 / Sectoral Distribution of Employment - FTEs



Sectors	Economic Impact 2014	Economic Impact 2013	+/- %	Employment 2014	Employment 2013	+/- %
Accommodation	71.62	59.62	20.1%	2,558	2,475	3.4%
Food & Drink	42.12	40.41	4.2%	753	723	4.2%
Recreation	16.36	15.74	4.0%	291	280	4.0%
Shopping	23.47	22.44	4.6%	405	387	4.6%
Transport	42.74	40.79	4.8%	657	627	4.8%
TOTAL DIRECT	196.31	178.99	9.7%	4,665	4,492	3.9%
Indirect	47.72	43.93	8.6%	812	748	8.6%
TOTAL	244.03	222.92	9.5%	5,477	5,240	4.5%



Report Prepared by: Alison Tipler. Date of Issue: 29/03/16

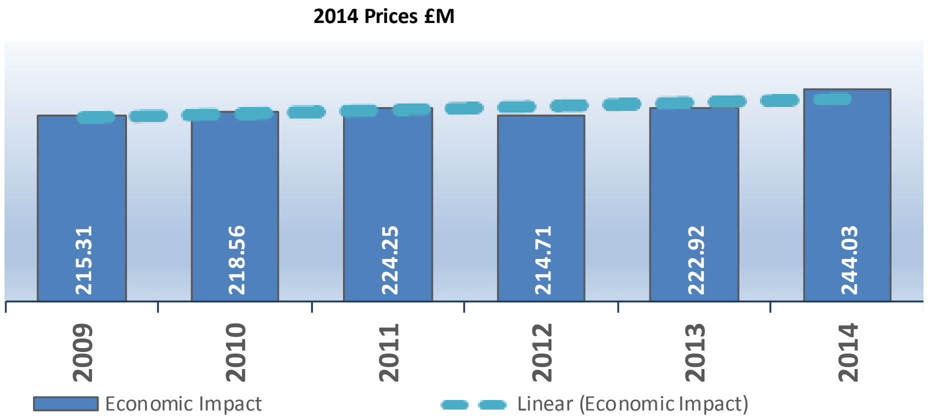
STEAM FINAL TREND REPORT FOR 2009-2014
CAIRNGORMS NATIONAL PARK

2009 to 2014 | **2014 Prices** | **TOTAL** | **KEY MEASURES Indexed**

Economic Impact - Indexed - Total

% Change Year on Year

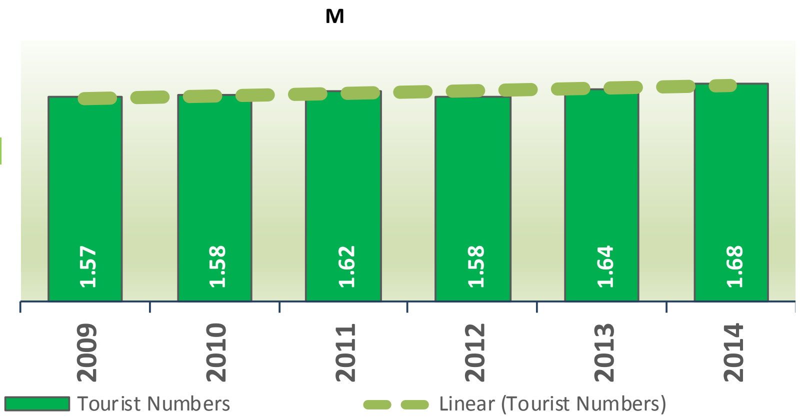
2010	1.5%
2011	2.6%
2012	-4.3%
2013	3.8%
2014	9.5%



Visitor Numbers - Total

% Change Year on Year

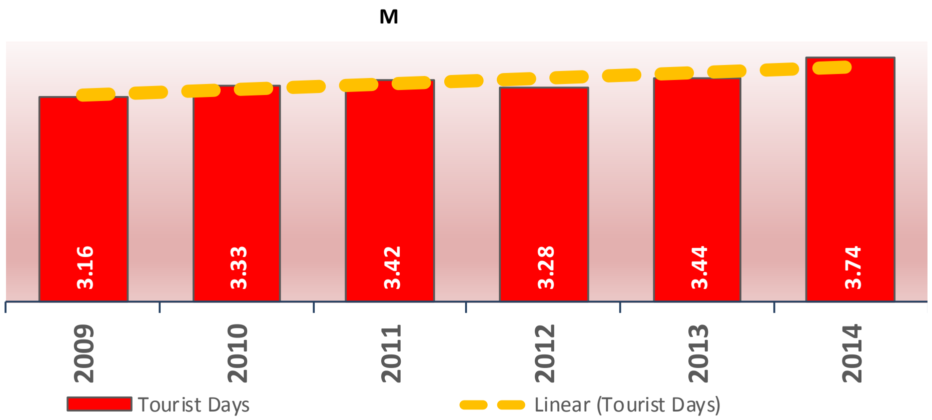
2010	0.8%
2011	2.2%
2012	-2.3%
2013	3.4%
2014	2.5%



Visitor Days - Total

% Change Year on Year

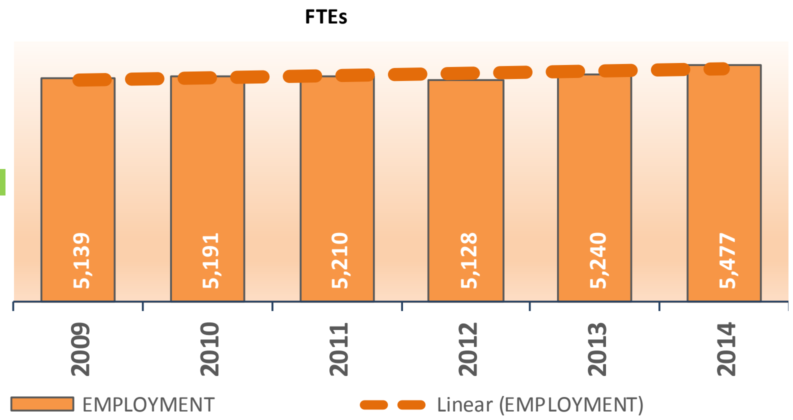
2010	5.6%
2011	2.6%
2012	-4.0%
2013	4.7%
2014	8.8%



Total Employment Supported - Total

% Change Year on Year

2010	1.0%
2011	0.4%
2012	-1.6%
2013	2.2%
2014	4.5%



% Change from 2009	2009	2010	2011	2012	2013	2014
Economic Impact - Indexed		1.5%	4.1%	-0.3%	3.5%	13.3%
Visitor Numbers		0.8%	3.1%	0.7%	4.2%	6.8%
Visitor Days		5.6%	8.4%	4.1%	9.0%	18.6%
Total Employment		1.0%	1.4%	-0.2%	2.0%	6.6%

"Linear" = *Linear Trendline*

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