

The Visitor Economy of the Cairngorms National Park

This is a summary of the annual tourism economic impact research undertaken for Cairngorms National Park for the calendar years 2013-2024. Outputs in this report have been generated using the Scottish Tourism Economic Activity Model (STEAM), owned and operated by Global Tourism Solutions (UK) Ltd.

COVID-19 /
STL Registration

Estimated tourism figures throughout Scotland appear to have returned to or surpassed pre-Covid estimates for the first time. In some cases, compulsory Short Term Let registration has caused changes in accommodation provision numbers, which can in turn affect STEAM estimates.



2024

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

53% of Visits

Day Visitors

47% of Visits

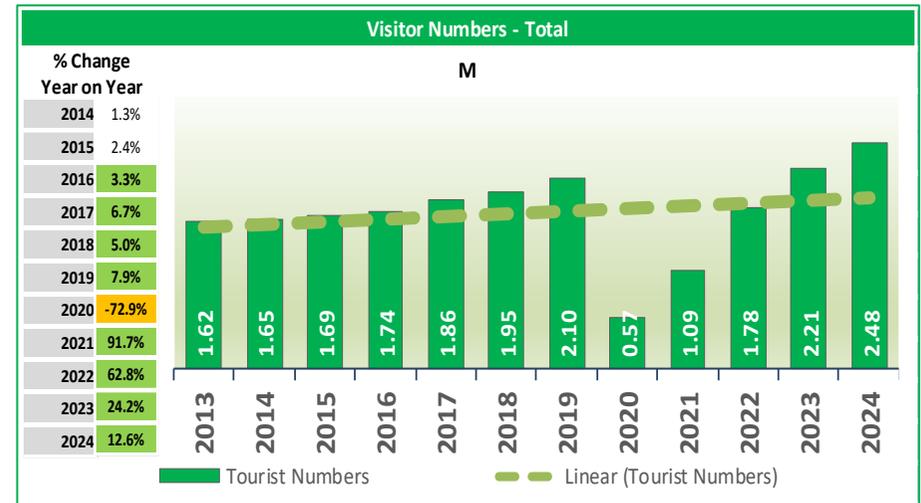
Total Visitor Numbers
2.5m

Visitor Numbers

There were an estimated 2.5m tourism visits to the Cairngorms National Park in 2024, up by 12.6% from the previous year, and also up 18.1% from estimated pre-covid levels reported in 2019, partially due to increases in the serviced and non-serviced accommodation sectors.

In 2024, 1.3 visitors stayed in some sort of accommodation within the area. This sector saw an increase of 19.3% when compared to the previous year and is now 27.8% above pre-covid levels. The serviced accommodation sector, primarily comprised of hotels, guest houses and B&Bs, saw a significant increase of 18.2% over the last year, and is well above 2019 pre-

covid levels. The much larger non-serviced accommodation sector was up substantially by 22.8% on the previous year and is now also well above pre-covid estimates, partially due to an increase in non-serviced accommodation within the area. Day visitors throughout many locations in the UK are just returning to pre-covid levels, especially in rural and semi-rural locations, so it is very encouraging to see that day visitors were up by 5.7% on the previous year. This has had a positive knock-on effect on total visitor numbers as a whole, as day visitors represent 47% of visitor numbers to the Cairngorms National Park.



Key Figures: Visitor Numbers 2024

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	M	0.793	0.496	0.033	1.322	1.161	2.484
2023 (Millions)	M	0.671	0.404	0.033	1.108	1.098	2.207
Change 23/24 (%)	%	+18.2	+22.8	+0.4	+19.3	+5.7	+12.6
Share of Total (%)	%	31.9	20.0	1.3	53.2	46.8	100.0

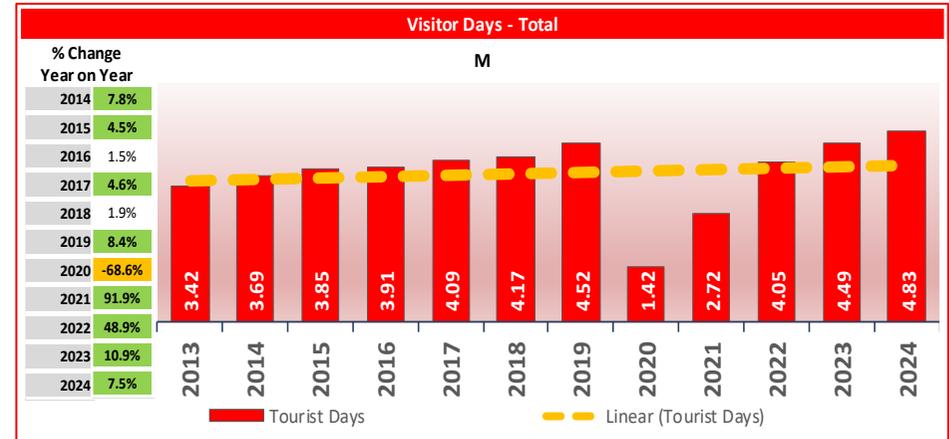
**Total
Visitor
Days
4.8m**

Visitor Days

Visitors spent an estimated 4.8m days in the Cairngorms National Park during 2024. Visitor days take into account multiple stays. For example, if a family of five stay three nights, they will not only account for five visitors, but also fifteen visitor days. On average, staying visitors to the area stay 2.8 days.

Total staying visitors accounted for 3.7m visitor days in 2024, an increase of 8.1% on the previous year, and are now 6.4% above 2019 pre-covid levels. The serviced accommodation sector decreased slightly by -4.4%

compared to the previous year (although numbers of visitors staying in serviced accommodation were up 18.2%); this 'more numbers but less visitor days' is a pattern seen throughout the UK and we attribute it to shorter stays due to the current economic climate. The much larger non-serviced accommodation sector was up by 13.8% on the previous year, and is now well above pre-covid 2019 levels. As mentioned before, day visitors to the area are up by 5.7% on the previous year, a very good result when compared to other areas, especially other rural ones.



Key Figures: Visitor Days 2024

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	M	0.917	2.604	0.148	3.669	1.161	4.830
2023 (Millions)	M	0.960	2.288	0.147	3.395	1.098	4.493
Change 23/24 (%)	%	-4.4	+13.8	+0.4	+8.1	+5.7	+7.5
Share of Total (%)	%	19.0	53.9	3.1	76.0	24.0	100.0

Average Length of Stay for Different Visitor Types: 2024



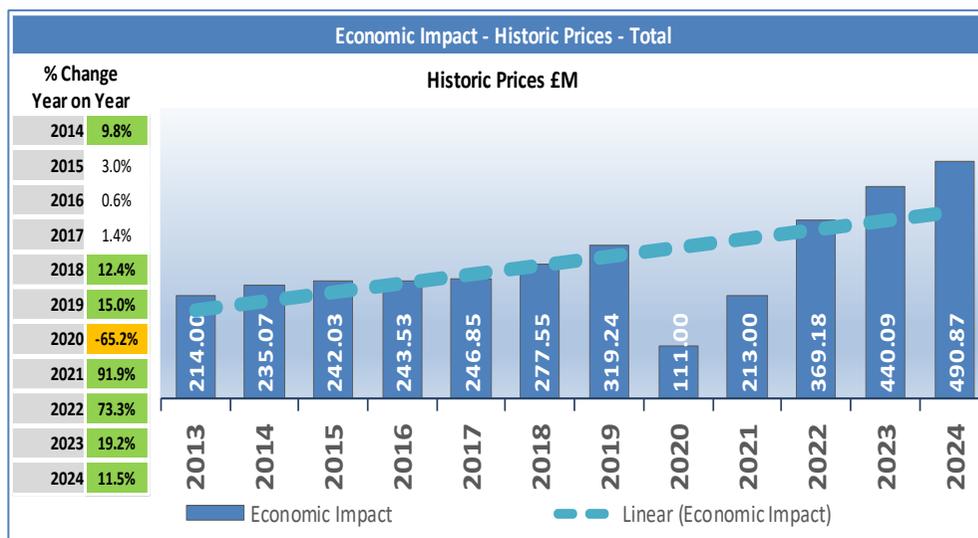
**Total
Economic
Impact
£491m**

Economic Impact

The value of tourism activity in the Cairngorms National Park was estimated to be £491m in 2024, up by 11.5% on the previous year, and up by 15.1% (when indexed for inflation) when compared to pre-covid levels.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £397m. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £94m, together totalling £491m. The largest

visitor spending sector by far was Accommodation (£171m), then Food & Drink (£76.2m), followed closely by Transport (£75.9m). The economic impact of the serviced sector was up by 4.7% on the previous year and is 19.8% (indexed) above estimated 2019 pre-covid levels. The larger non-serviced accommodation sector, comprising self-catering and some caravan, camping and touring sites, was up 23.7% on 2023 and is 11.8% (indexed) above pre-covid estimates. In terms of comparison, the non-serviced sector is more seasonal and has around four times more bedspaces than the serviced sector, but the serviced sector has far more economic impact. Meanwhile the day visitor economic impact is up by 11.4% on the previous year but has less than a fifth of the economic impact of the staying visitor sector.



- Accommodation:** Payments for overnight stays in accommodation, such as room rates, 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

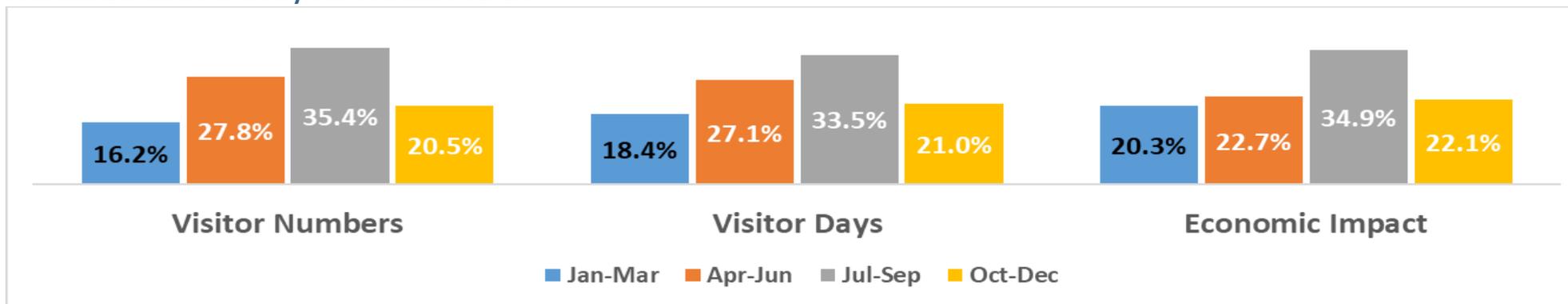
Key Figures: Economic Impact 2024

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (£ Millions)	£M	242.830	167.007	5.848	415.685	75.187	490.872
2023 (£ Millions)	£M	232.017	135.039	5.568	372.624	67.469	440.093
Change 23/24 (%)	%	+4.7	+23.7	+5.0	+11.6	+11.4	+11.5
Share of Total (%)	%	49.5	34.0	1.2	84.7	15.3	100.0

Average Economic Impact Generated by Each Type of Visitor: 2024

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	£ 264.74	£ 64.14	£ 39.53	£ 113.30	£ 64.74	£ 101.62
Economic Impact per Visit	£ 306.21	£ 336.44	£ 177.06	£ 314.33	£ 64.74	£ 197.63

Seasonal Distribution of Key Visitor Metrics: 2024



**Total
FTEs
Supported
6,291**

Employment Supported by Tourism

The expenditure and activity of visitors to Cairngorms National Park supported a total of 6,291 Full-Time Equivalent jobs (FTEs) in 2024; a increase of 3.2% on the year before.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 5,225 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 1,066 FTEs. The Accommodation sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 2,679 FTEs, followed by Food & Drink at 907 FTEs, then Transport at 777 FTEs followed by Shopping at 507 FTEs.

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2024

Employment Supported by Sector 2024	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	2,679	907	355	507	777	5,225	1,066	6,291

STEAM Comparative Headlines: 2023 and 2024 (Unindexed)

STEAM REPORT FOR 2013-2024 - FINAL
CAIRNGORMS NATIONAL PARK AUTHORITY

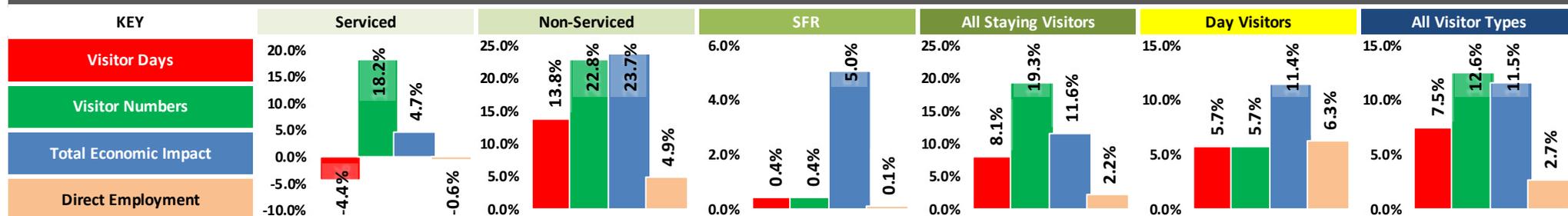
Comparing 2024 and 2023
All £'s Historic Prices

COMPARATIVE HEADLINES

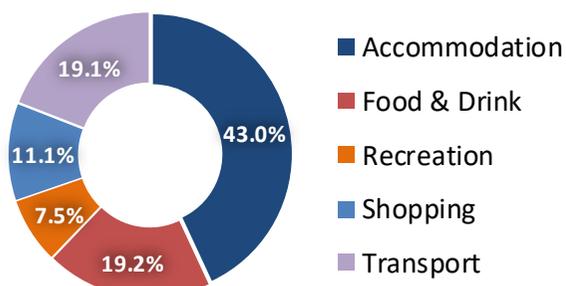
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2023 - IN HISTORIC PRICES

KEY	Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced																	
	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %			
Visitor Days	M	0.917	0.960	-4.4%	2.604	2.288	13.8%	0.148	0.147	0.4%	3.669	3.395	8.1%	1.161	1.098	5.7%	4.830	4.493	7.5%		
Visitor Numbers	M	0.793	0.671	18.2%	0.496	0.404	22.8%	0.033	0.033	0.4%	1.322	1.108	19.3%	1.161	1.098	5.7%	2.484	2.207	12.6%		
Direct Expenditure	£M																396.84	355.16	11.7%		
Economic Impact	£M	242.83	232.02	4.7%	167.01	135.04	23.7%	5.848	5.568	5.0%	415.68	372.62	11.6%	75.19	67.47	11.4%	490.87	440.09	11.5%		
Direct Employment	FTEs	2,144	2,158	-0.6%	2,343	2,233	4.9%	53	53	0.1%	4,540	4,444	2.2%	685	645	6.3%	5,225	5,089	2.7%		
Total Employment	FTEs																6,291	6,098	3.2%		

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2023 - IN HISTORIC PRICES



Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices



Direct Expenditure Categories

	2024	2023	+/- %
Accommodation	170.74	150.32	13.6%
Food & Drink	76.15	68.87	10.6%
Recreation	29.95	26.97	11.0%
Shopping	44.13	39.93	10.5%
Transport	75.87	69.07	9.8%
TOTAL DIRECT	396.84	355.16	11.7%
Indirect	94.03	84.93	10.7%
TOTAL	490.87	440.09	11.5%

Sectors

	2024	2023	+/- %
Accommodation	2,679	2,669	0.4%
Food & Drink	907	861	5.4%
Recreation	355	336	5.8%
Shopping	507	481	5.3%
Transport	777	742	4.7%
TOTAL DIRECT	5,225	5,089	2.7%
Indirect	1,066	1,010	5.5%
TOTAL	6,291	6,098	3.2%

Sectoral Distribution of Employment - FTEs



Direct Employment Categories

STEAM Comparative Headlines: 2019 and 2024 Covid Recovery (Indexed for inflation)

STEAM REPORT FOR 2013-2024 - FINAL
CAIRNGORMS NATIONAL PARK AUTHORITY

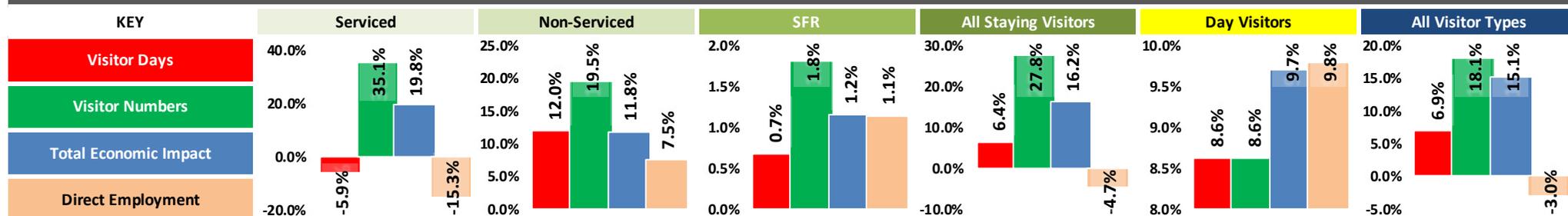
Comparing 2024 and 2019
2019 in 2024 prices (1.336)

COMPARATIVE HEADLINES

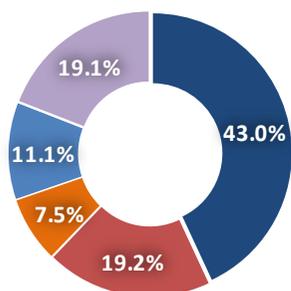
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2019 - INDEXED TO 2024

KEY	Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced			2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %
	2024	2019	+/- %	2024	2019	+/- %															
Visitor Days	M	0.917	0.975	-5.9%	2.604	2.325	12.0%	0.148	0.147	0.7%	3.669	3.447	6.4%	1.161	1.069	8.6%	4.830	4.516	6.9%		
Visitor Numbers	M	0.793	0.587	35.1%	0.496	0.416	19.5%	0.033	0.032	1.8%	1.322	1.035	27.8%	1.161	1.069	8.6%	2.484	2.104	18.1%		
Direct Expenditure	£M																396.84	344.94	15.0%		
Economic Impact	£M	242.83	202.69	19.8%	167.01	149.39	11.8%	5.848	5.781	1.2%	415.68	357.86	16.2%	75.19	68.54	9.7%	490.87	426.40	15.1%		
Direct Employment	FTEs	2,144	2,531	-15.3%	2,343	2,179	7.5%	53	52	1.1%	4,540	4,762	-4.7%	685	624	9.8%	5,225	5,386	-3.0%		
Total Employment	FTEs																6,291	6,310	-0.3%		

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2019 - INDEXED TO 2024



Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2024



- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport

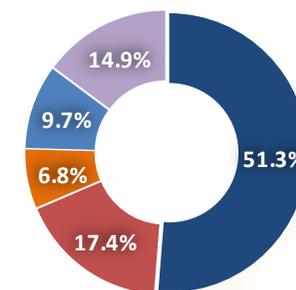
Direct Expenditure Categories

	2024	2019	+/- %
Accommodation	170.74	138.01	23.7%
Food & Drink	76.15	69.70	9.3%
Recreation	29.95	27.81	7.7%
Shopping	44.13	40.49	9.0%
Transport	75.87	68.94	10.1%
TOTAL DIRECT	396.84	344.94	15.0%
Indirect	94.03	81.46	15.4%
TOTAL	490.87	426.40	15.1%

Sectors

	2024	2019	+/- %
Accommodation	2,679	3,055	-12.3%
Food & Drink	907	830	9.3%
Recreation	355	330	7.7%
Shopping	507	465	9.0%
Transport	777	706	10.1%
TOTAL DIRECT	5,225	5,386	-3.0%
Indirect	1,066	923	15.4%
TOTAL	6,291	6,310	-0.3%

Sectoral Distribution of Employment - FTEs



- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport

Direct Employment Categories