Cairngorms National Park
STEAM Tourism Economic Impacts 2025 Year in Review Summary

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 2014-2025. 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 have returned to or surpassed pre-Covid estimates. In some cases, compulsory Short Term Let registration has caused changes in accommodation provision numbers, which can in turn affect STEAM estimates.**

2025

2.6m tourism visits to **Cairngorms National Park** in **2025**

1.3m visits were made by visitors **staying within the area** as part of a holiday or short break, generating **3.7 million nights** in local accommodation

5.0 million Visitor Days and Nights generated by Visitors in **2025**

On average, visitors **staying in the area** spend **2.9** nights in the area and spend a total of **£179.5 million** on local accommodation

1.3m tourism visits made by **Day Visitors**

Day Visits to Cairngorms National Park generated **£87.5 million** for the local economy in **2025**

In total, **staying visitors** generate a **total economic impact** of **£434 million** for local businesses and communities

Visitor activity and spend supports more than **6,183 full time equivalent jobs** locally

A total of **£522 million** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

Trends 2024-2025

Economic Impact +6.3%

Visitor Numbers +4.6%

Total Visitor Days and Nights 4.3%

2025

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
50% of Visits

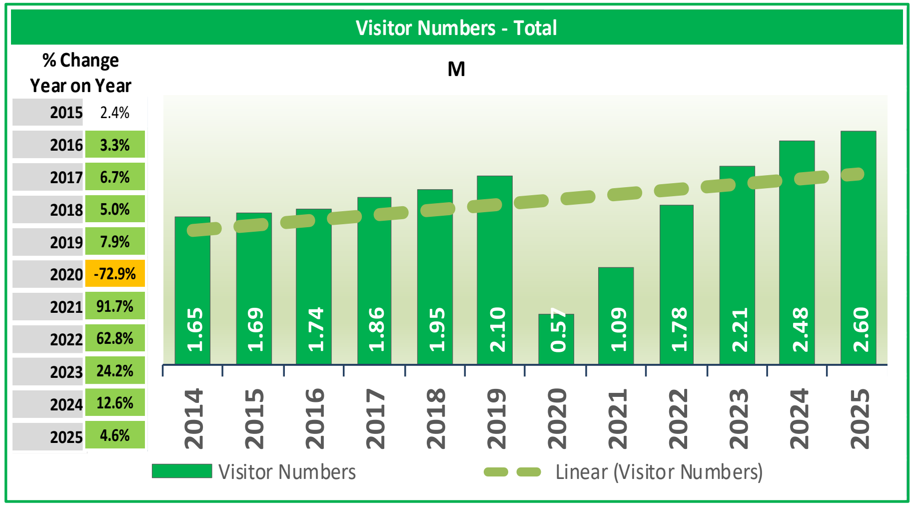
Day Visitors
50% of Visits

Total Visitor Numbers
2.6m

Visitor Numbers

There were an estimated 2.6m tourism visits to the Cairngorms National Park in 2025, up by 4.6% from the previous year, and also up 57.9% since 2014, due to increases across all visitor sectors, but especially in non-serviced accommodation and day visitors.

Between 2024 and 2025 total visitor numbers rose in the Park, but not uniformly. Visitor numbers were up in non-serviced accommodation (comprising self-catering options and some caravan, camping and touring sites) by 9.2% and within the Day Visitor sector visitor numbers rose by 12.2%. In contrast, visitors within the serviced accommodation sector (primarily comprised of hotels, guest houses and B&Bs) declined slightly by -9.2% on the year before. This is a consistent pattern seen throughout the United Kingdom, with negative percents in serviced accommodation being commonplace, and one we attribute to the current economic climate. It is more apparent in Badenoch & Strathspey, than the rest of the Park. The serviced sector is still by far the largest accommodation sector, with just under a third more visitor numbers than the non-serviced sector. Day visitor numbers are on the increase year-on-year, and this is both encouraging as they represent 50% of all visitors to the area.



Key Figures: Visitor Numbers 2025

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (Millions)	**M**	**0.720**	**0.542**	**0.033**	**1.295**	**1.303**	**2.599**
2024 (Millions)	M	0.793	0.496	0.033	1.322	1.161	2.484
Change 24/25 (%)	**%**	**-9.2**	**+9.2**	**+0.5**	**-2.1**	**+12.2**	**+4.6**
Share of Total (%)	%	27.7	20.9	1.3	49.8	50.2	100.0

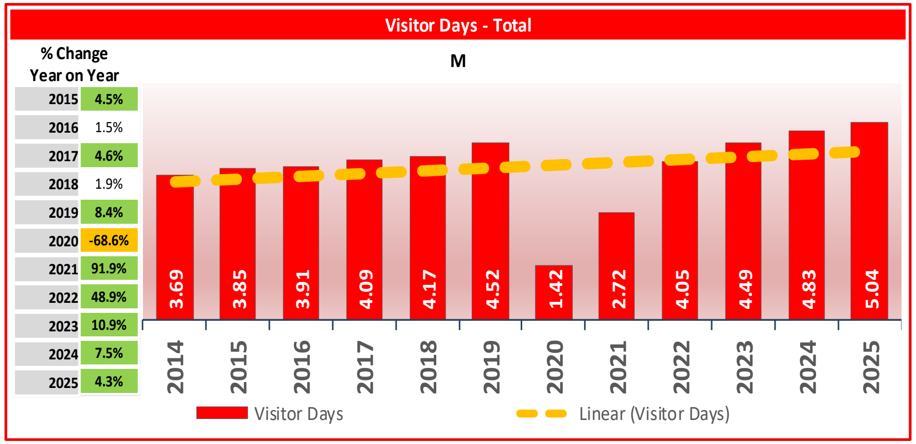
Total Visitor Days

5.0m

Visitor Days

Visitors spent an estimated 5.0m days in the Cairngorms National Park during 2025. 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 2.9 days.

Total visitor days were up 4.3% from the year before. But as we saw with visitor numbers, there are differences within the overall picture. The non-serviced accommodation sector saw an increase 2.8%; combined with a large rise in visitor numbers, this means more visits were made to non-serviced accommodation and visitors stayed *slightly* longer. As mentioned before, we have seen a small downturn in serviced accommodation numbers throughout the UK, and estimates show a fractional decrease in the Park of -1.0%. This means fewer days spent in serviced accommodation and visitors stayed *slightly* shorter stays, but marginally. Given the current economic uncertainties and constraints, this might be expected; it seems to be more apparent in urban locations. Day visitor numbers and days remain at 12.2% as day visitors do not stay overnight.



Key Figures: Visitor Days 2025

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (Millions)	**M**	**0.908**	**2.677**	**0.149**	**3.734**	**1.303**	**5.038**
2024 (Millions)	M	0.917	2.604	0.148	3.669	1.161	4.830
Change 24/25 (%)	**%**	**-1.0**	**+2.8**	**+0.5**	**+1.8**	**+12.2**	**+4.3**
Share of Total (%)	%	18.0	53.2	3.0	74.1	25.9	100.0

Average Length of Stay for Different Visitor Types: 2025

Day Visitors	All Visitors	Serviced Accommodation	Staying with Friends/Relatives	All Staying Visitors	Non-Serviced Accommodation
1.0	1.9	1.3	4.5	2.9	4.9

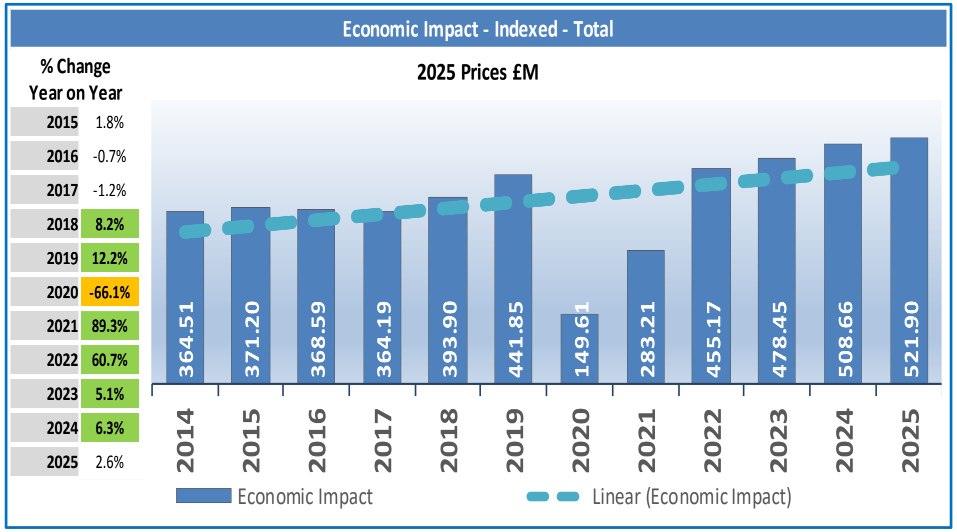
Total Economic Impact

£522m

Economic Impact

The value of tourism activity in the Cairngorms National Park was estimated to be £522m in 2025, up by 6.3% on the previous year, and up by 43.2% when indexed for inflation (as illustrated in the bar chart below) when compared to 2014 estimates.

Economic impact is comprised of two sections within the model. The first is the direct expenditure on good and services, in this case, £422 million. To this we conservatively add the indirect economic impact within the area of £100 million, to account for the supply chain- those suppling goods and services to support the visitor sector and its wider infrastructure. By far the most important sector is the serviced accommodation sector, at £249 million, up 2.6% on the previous year. This is followed by the non-serviced accommodation sector at £179 million and then the day visitor sector at £87.5 million. The model also estimates the sectoral distribution of the economic impact as follows: Accommodation £179.5m; Food & Drink £82m; followed very closely by Transport at £80m; then Shopping £48m; and Recreation at £33m. The non-serviced accommodation sector has around two-thirds the economic impact of the serviced sector. All staying visitors have around five times the economic impact of the day visitor sector within the Park, but the day visitors increased their economic impact by 16.3% compared to last year, which was the highest percentage gain of any sector in 2025.



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

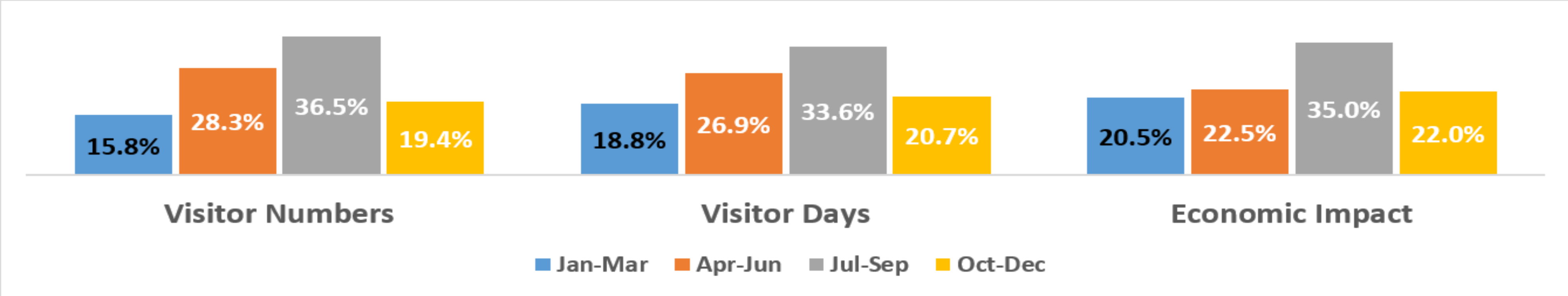
Key Figures: Economic Impact 2025 (Unindexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (£ Millions)	**£M**	**249.151**	**179.189**	**6.084**	**434.424**	**87.477**	**521.901**
2024 (£ Millions)	£M	242.830	167.007	5.848	415.685	75.187	490.872
Change 24/25 (%)	**%**	**+2.6**	**+7.3**	**+4.0**	**+4.5**	**+16.3**	**+6.3**
Share of Total (%)	%	47.7	34.3	1.2	83.2	16.8	100.0

Average Economic Impact Generated by Each Type of Visitor: 2025

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	**£ 274.41**	**£ 66.92**	**£ 40.93**	**£ 116.34**	**£ 67.11**	**£ 103.60**
Economic Impact per Visit	£ 346.19	£ 330.46	£ 183.35	£ 335.43	£ 67.11	£ 200.85

Seasonal Distribution of Key Visitor Metrics: 2025



Total FTEs Supported

6,183

Employment Supported by Tourism

The expenditure and activity of visitors to Cairngorms National Park supported a total of 6,183 Full-Time Equivalent jobs (FTEs) in 2025; a very slight decrease of -1.7% on the year before, but an increase of 15.8% since 2014.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 5,091 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 1,093 FTEs. The Accommodation sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 2,453 FTEs, followed by Food & Drink at 941 FTEs, then Transport at 793 FTEs followed by Shopping at 530 FTEs.

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2025

Employment Supported by Sector 2025	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	2,453	941	374	530	793	5,091	1,093	6,183

STEAM Comparative Headlines: 2024 and 2025 (Unindexed)

STEAM REPORT FOR 2014-2025 - FINAL CAIRNGORMS NATIONAL PARK AUTHORITY	Comparing 2025 and 2024 All £'s Historic Prices	COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2025 & 2024 - IN HISTORIC PRICES

KEY

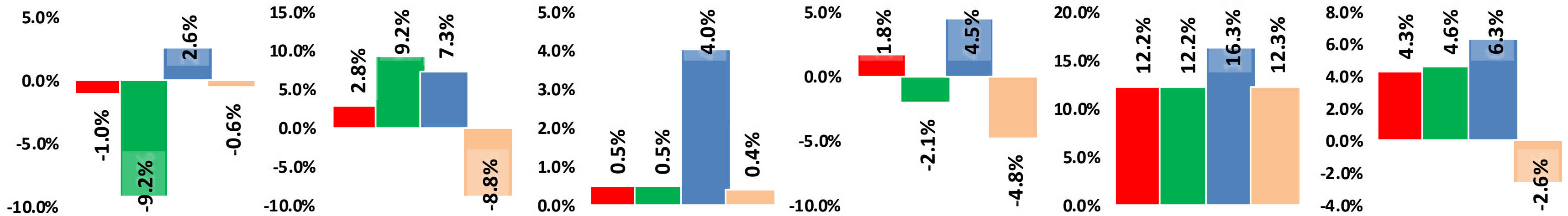
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %
Visitor Days	M	0.908	0.917	-1.0%	2.677	2.604	2.8%	0.149	0.148	0.5%	3.734	3.669	1.8%	1.303	1.161	12.2%	5.038	4.830	4.3%
Visitor Numbers	M	0.720	0.793	-9.2%	0.542	0.496	9.2%	0.033	0.033	0.5%	1.295	1.322	-2.1%	1.303	1.161	12.2%	2.599	2.484	4.6%
Direct Expenditure	£M																422.01	396.84	6.3%
Economic Impact	£M	249.15	242.83	2.6%	179.19	167.01	7.3%	6.084	5.848	4.0%	434.42	415.68	4.5%	87.48	75.19	16.3%	521.90	490.87	6.3%
Direct Employment	FTEs	2,132	2,144	-0.6%	2,136	2,343	-8.8%	53	53	0.4%	4,322	4,540	-4.8%	769	685	12.3%	5,091	5,225	-2.6%
Total Employment	FTEs																6,183	6,291	-1.7%

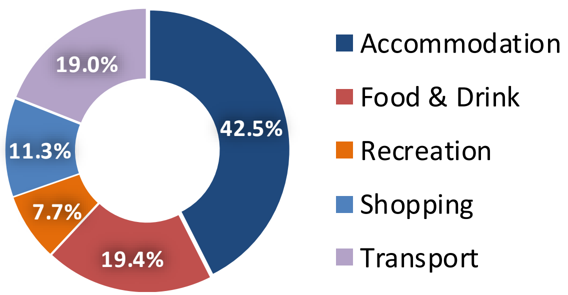
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2025 & 2024 - IN HISTORIC PRICES

KEY

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



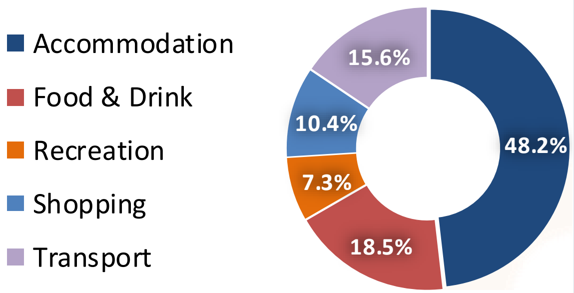
Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices



Direct Expenditure Categories

Sectoral Distribution of Employment - FTEs

Economic Impact 2025	Economic Impact 2024	+/- %	Sectors	Employment 2025	Employment 2024	+/- %
179.49	170.74	5.1%	Accommodation	2,453	2,679	-8.4%
81.83	76.15	7.5%	Food & Drink	941	907	3.7%
32.64	29.95	9.0%	Recreation	374	355	5.2%
47.81	44.13	8.4%	Shopping	530	507	4.6%
80.24	75.87	5.8%	Transport	793	777	2.1%
422.01	396.84	6.3%	TOTAL DIRECT	5,091	5,225	-2.6%
99.89	94.03	6.2%	Indirect	1,093	1,066	2.5%
521.90	490.87	6.3%	TOTAL	6,183	6,291	-1.7%



Direct Employment Categories

STEAM Comparative Headlines: 2014 and 2025 (Indexed for inflation)

STEAM REPORT FOR 2014-2025 - FINAL CAIRNGORMS NATIONAL PARK AUTHORITY	Comparing 2025 and 2014 2014 in 2025 prices (1.551)	COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2025 & 2014 - INDEXED TO 2025

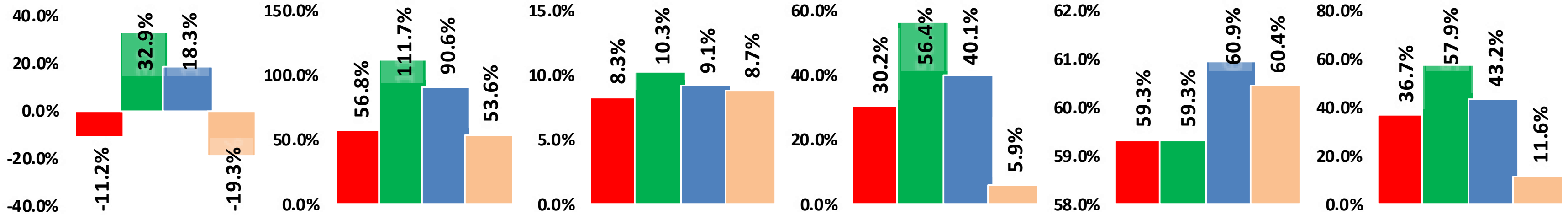
KEY
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

		Staying in Paid Accommodation: Serviced			Staying in Paid Accommodation: Non-Serviced			Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		2025	2014	+/- %	2025	2014	+/- %	2025	2014	+/- %	2025	2014	+/- %	2025	2014	+/- %	2025	2014	+/- %
Visitor Days	M	0.908	1.023	-11.2%	2.677	1.708	56.8%	0.149	0.137	8.3%	3.734	2.868	30.2%	1.303	0.818	59.3%	5.038	3.686	36.7%
Visitor Numbers	M	0.720	0.542	32.9%	0.542	0.256	111.7%	0.033	0.030	10.3%	1.295	0.828	56.4%	1.303	0.818	59.3%	2.599	1.646	57.9%
Direct Expenditure	£M																422.01	293.38	43.8%
Economic Impact	£M	249.15	210.56	18.3%	179.19	94.03	90.6%	6.084	5.575	9.1%	434.42	310.16	40.1%	87.48	54.35	60.9%	521.90	364.51	43.2%
Direct Employment	FTEs	2,132	2,640	-19.3%	2,136	1,391	53.6%	53	49	8.7%	4,322	4,081	5.9%	769	479	60.4%	5,091	4,560	11.6%
Total Employment	FTEs																6,183	5,341	15.8%

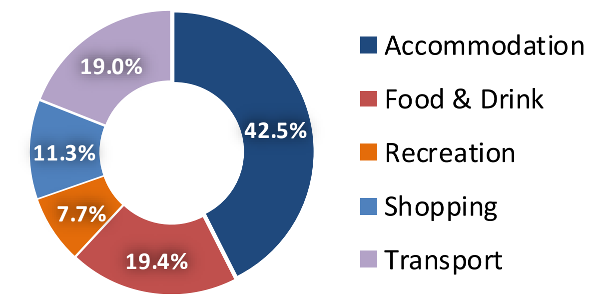
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2025 & 2014 - INDEXED TO 2025

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

Serviced | Non-Serviced | SFR | All Staying Visitors | Day Visitors | All Visitor Types

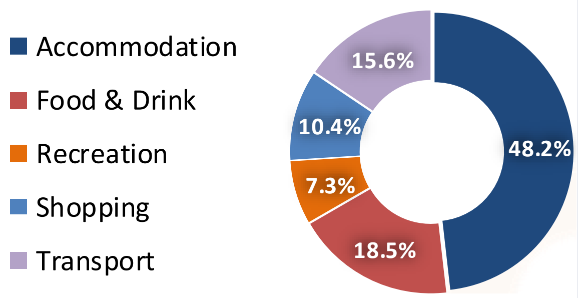


Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2025 / Sectoral Distribution of Employment - FTEs



Direct Expenditure Categories

Sectors	Economic Impact 2025	Economic Impact 2014	+/- %	Employment 2025	Employment 2014	+/- %
Accommodation	179.49	106.76	68.1%	2,453	2,526	-2.9%
Food & Drink	81.83	63.08	29.7%	941	728	29.3%
Recreation	32.64	24.75	31.9%	374	284	31.5%
Shopping	47.81	35.33	35.3%	530	393	34.9%
Transport	80.24	63.47	26.4%	793	629	26.0%
TOTAL DIRECT	422.01	293.38	43.8%	5,091	4,560	11.6%
Indirect	99.89	71.13	40.4%	1,093	781	40.0%
TOTAL	521.90	364.51	43.2%	6,183	5,341	15.8%



Direct Employment Categories