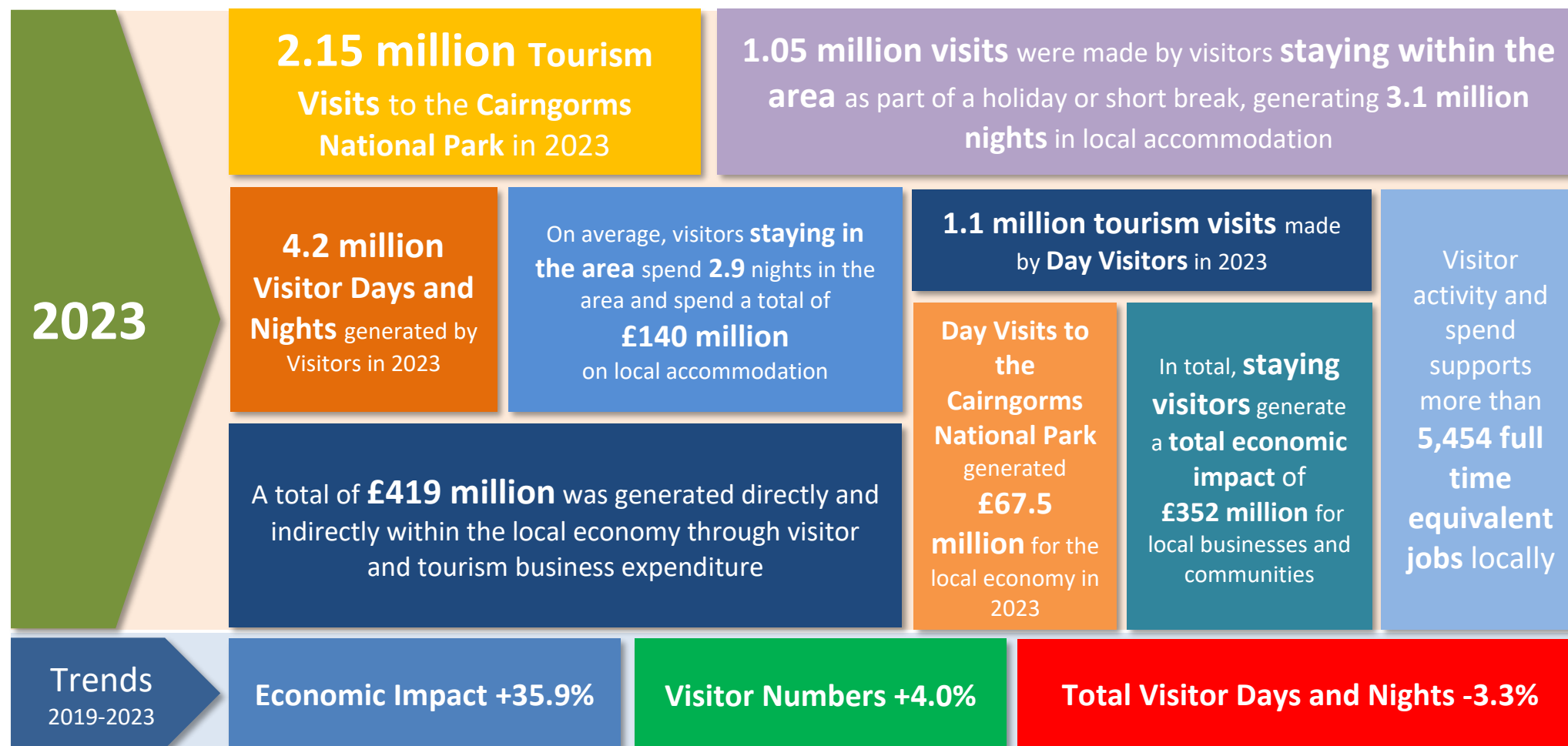


The Visitor Economy of Cairngorms National Park

This is a summary of the annual tourism economic impact research undertaken for the Cairngorms National Park for the calendar years 2012-2023. Outputs in this report have been generated using STEAM, the tourism specific economic impact model, owned and operated by Global Tourism Solutions (UK) Ltd.

**COVID-19
Pandemic**

Some STEAM outputs for 2023 remain below the level of usual economic outputs for the area, due to the residual effects of the COVID-19 pandemic on business and consumer activity. Comparisons have been made to show performance levels against a pre-COVID-19 baselines.



2023

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

49% of Visits

Day Visitors

51% of Visits

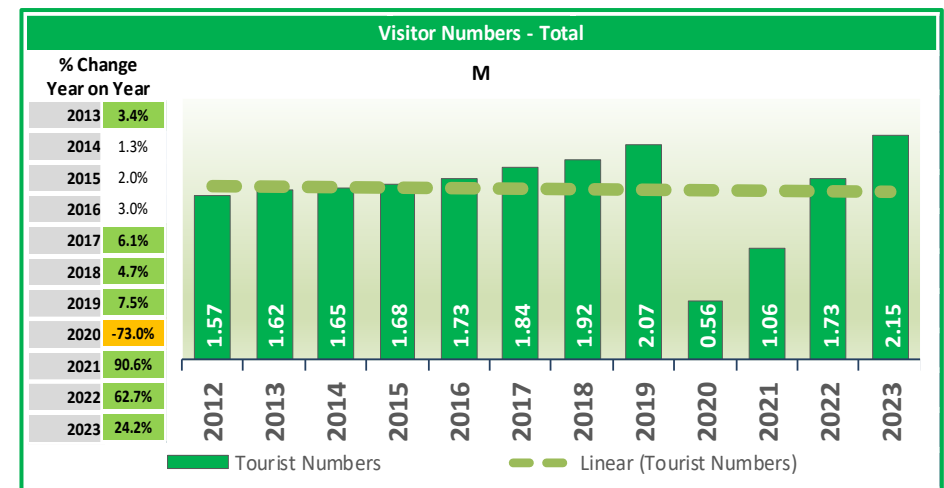
**Total
Visitor
Numbers
2.15m**

Visitor Numbers

There were an estimated 2.15m tourism visits to the Cairngorms National Park in 2023, up 24.2% from the previous year, and up 4.0% from estimated pre-covid levels reported in 2019.

In 2023, 1.05m visitors stayed in some sort of accommodation within the area. This sector saw an increase of 17.8% when compared to the previous year and is now 5.3% above pre-covid levels. The serviced accommodation sector, primarily comprised of hotels, guest houses and B&Bs, saw an increase of 19.0% over the last year and is now above 2019 pre-covid

levels by 14.4%. Serviced accommodation supply has decreased within the Park in the aftermath of covid, but this has failed to dampen down the National Park's recovery in this sector. The non-serviced accommodation sector also continues to recover steadily and is now just -8.3% below pre-covid 2019 figures, while up 16.4% on the previous year. Day visitors throughout many locations in the UK are still below pre-covid levels, especially in rural and semi-rural locations, so it is extremely encouraging to see day visitor numbers up 30.9% on 2022, and now up 2.7% on pre-covid estimates in 2019.



Key Figures: Visitor Numbers 2023

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (Millions)	M	0.671	0.347	0.033	1.051	1.098	2.149
2022 (Millions)	M	0.564	0.298	0.030	0.892	0.839	1.731
Change 22/23 (%)	%	+19.0	+16.4	+9.0	+17.8	+30.9	+24.2
Share of Total (%)	%	31.2	16.1	1.5	48.9	51.1	100.0

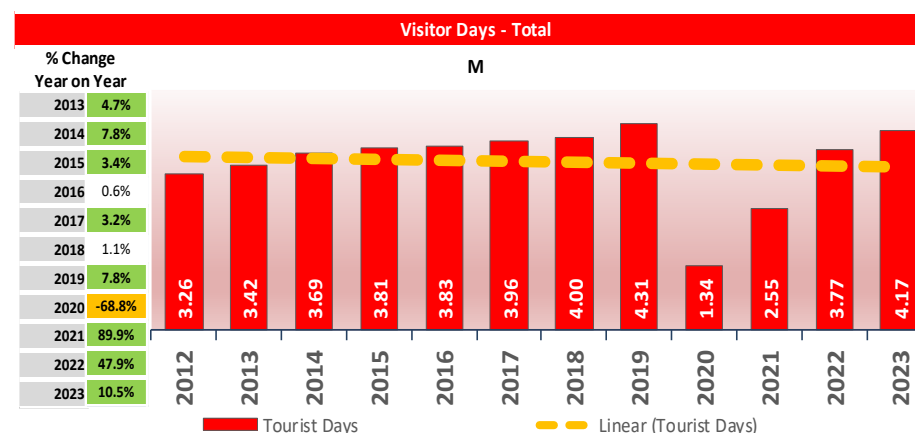
**Total
Visitor
Days**
4.17m

Visitor Days

Visitors spent an estimated 4.17m days in the Cairngorms National Park during 2023. 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 Park stay 2.9 days in the area.

Total staying visitors accounted for 3.1m visitor days in 2023, an increase of 4.7% on the previous year, and now only -5.2% below 2019 pre-covid levels. The serviced accommodation sector decreased slightly by -3.0%

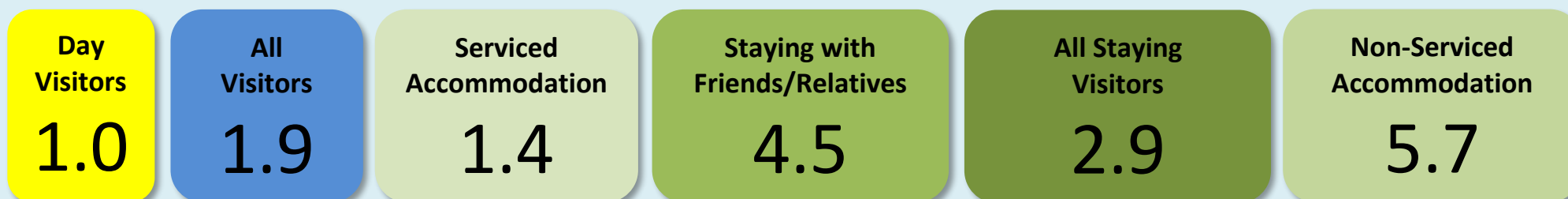
compared to 2022, and is now just fractionally -1.6% below pre-covid figures reported in 2019. Meanwhile the much larger non-serviced accommodation sector within the Park is up 8.6% on the previous year, but still down -7.3% on 2019, which points to the serviced sector recovering slightly ahead of the non-serviced sector. As mentioned before, day visitors to the Park are not only substantially up by 30.9% on the previous year, but they buck the overall slower recovery trend seen in other rural and semi-rural areas in the UK by now surpassing estimated pre-covid level by 2.7%.



Key Figures: Visitor Days 2023

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (Millions)	M	0.960	1.963	0.147	3.070	1.098	4.169
2022 (Millions)	M	0.989	1.808	0.136	2.933	0.839	3.772
Change 22/23 (%)	%	-3.0	+8.6	+8.4	+4.7	+30.9	+10.5
Share of Total (%)	%	23.0	47.1	3.5	73.7	26.3	100.0

Average Length of Stay for Different Visitor Types: 2023



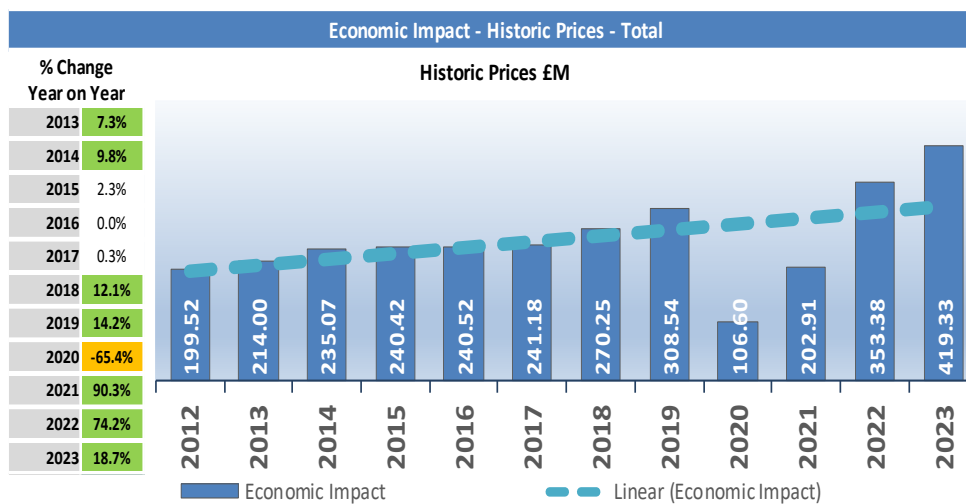
**Total
Economic
Impact
£419m**

Economic Impact

The value of tourism activity in the Caringorms National Park was estimated to be £419m in 2023, up by 18.7% on the previous year, and up by 35.9% when compared to pre-covid levels.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £338m. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £81, together totalling £419m. The largest

visitor spending sector was Accommodation (£140m), then Transport (£66.63m), followed extremely closely by Food & Drink (£66.58m) and then shopping (£38.5m). The economic impact of the serviced sector was up 11.3% on the previous year, reflecting increases in visitor numbers, and is now 52.9% up on estimated 2019 pre-covid levels. The Park's larger non-serviced accommodation sector, comprising self-catering and some caravan, camping and touring sites, was up by 20.6% on 2022, and since 2019 has increased by 13%. In terms of comparison, the non-serviced sector has over three times the bedspaces of the serviced sector, but less than half the economic impact. Day visitor economic impact to the Park is up 48.1% on the previous year, and is now 31.5% above 2019 pre-covid levels.



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

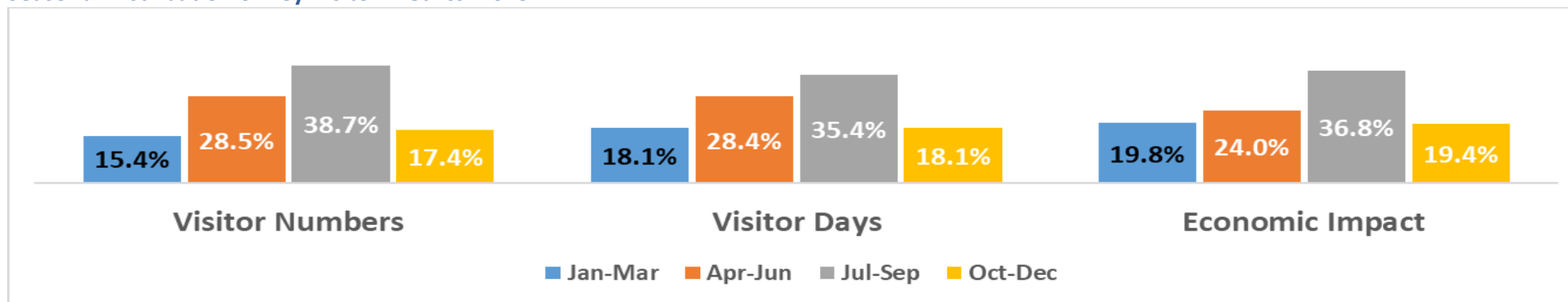
Key Figures: Economic Impact 2023

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (£ Millions)	£M	232.017	114.280	5.565	351.862	67.469	419.331
2022 (£ Millions)	£M	208.550	94.778	4.505	307.833	45.547	353.380
Change 22/23 (%)	%	+11.3	+20.6	+23.5	+14.3	+48.1	+18.7
Share of Total (%)	%	55.3	27.3	1.3	83.9	16.1	100.0

Average Economic Impact Generated by Each Type of Visitor: 2023

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	£ 241.73	£ 58.20	£ 37.79	£ 114.60	£ 61.42	£ 100.58
Economic Impact per Visit	£ 345.71	£ 329.36	£ 169.32	£ 334.80	£ 61.42	£ 195.09

Seasonal Distribution of Key Visitor Metrics: 2023



**Total
FTEs
Supported
5,454**

Employment Supported by Tourism

The expenditure and activity of visitors to the Cairngorms National Park supported a total of 5,454 Full-Time Equivalent jobs (FTEs) in 2023; an increase of 2.4% on the year before, and now just -8.2% below 2019 pre-covid levels.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 4,484 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 970 FTEs. The accommodation sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 2,149 FTEs, followed by Food & Drink at 832 FTEs, and then Transport at 716 FTEs.

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2023

Employment Supported by Sector 2023	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	2,149	832	323	464	716	4,484	970	5,454

STEAM Comparative Headlines: 2022 and 2023

STEAM REPORT FOR 2012-2023 - FINAL
CAIRNGORMS NATIONAL PARK AUTHORITY

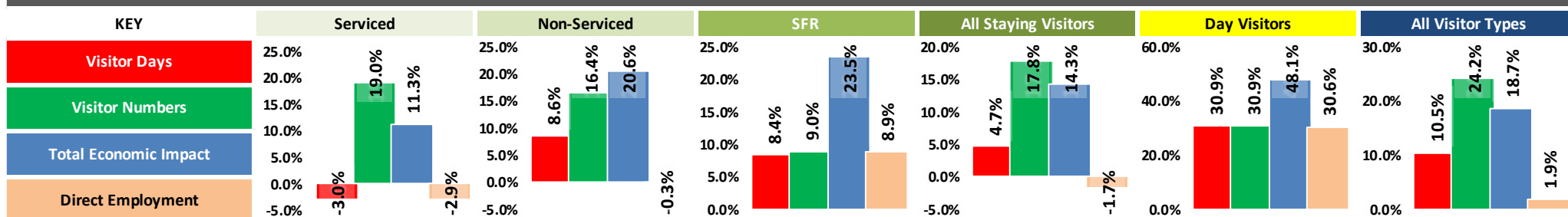
Comparing 2023 and 2022
All £'s Historic Prices

COMPARATIVE HEADLINES

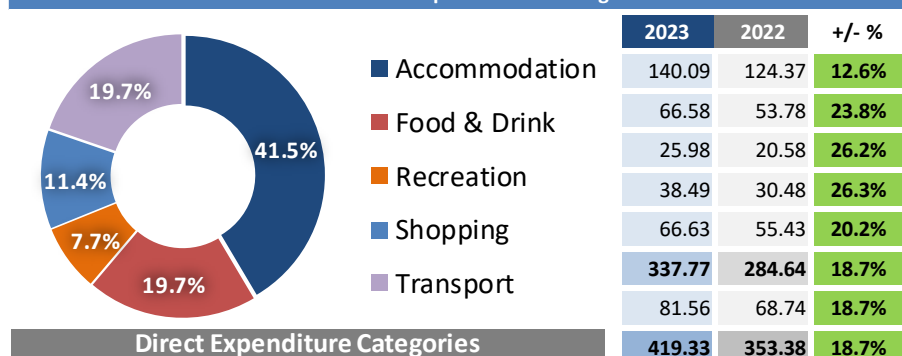
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2023 & 2022 - IN HISTORIC PRICES

KEY																			
An increase of 3% or more		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
Less than 3% change		Serviced			Non-Serviced														
A Fall of 3% or more		2023	2022	+/- %	2023	2022	+/- %	2023	2022	+/- %	2023	2022	+/- %	2023	2022	+/- %	2023	2022	+/- %
Visitor Days	M	0.960	0.989	-3.0%	1.963	1.808	8.6%	0.147	0.136	8.4%	3.070	2.933	4.7%	1.098	0.839	30.9%	4.169	3.772	10.5%
Visitor Numbers	M	0.671	0.564	19.0%	0.347	0.298	16.4%	0.033	0.030	9.0%	1.051	0.892	17.8%	1.098	0.839	30.9%	2.149	1.731	24.2%
Direct Expenditure	£M																337.77	284.64	18.7%
Economic Impact	£M	232.02	208.55	11.3%	114.28	94.78	20.6%	5.565	4.505	23.5%	351.86	307.83	14.3%	67.47	45.55	48.1%	419.33	353.38	18.7%
Direct Employment	FTEs	2,158	2,224	-2.9%	1,629	1,633	-0.3%	53	49	8.9%	3,840	3,905	-1.7%	645	494	30.6%	4,484	4,399	1.9%
Total Employment	FTEs																5,454	5,326	2.4%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2023 & 2022 - IN HISTORIC PRICES



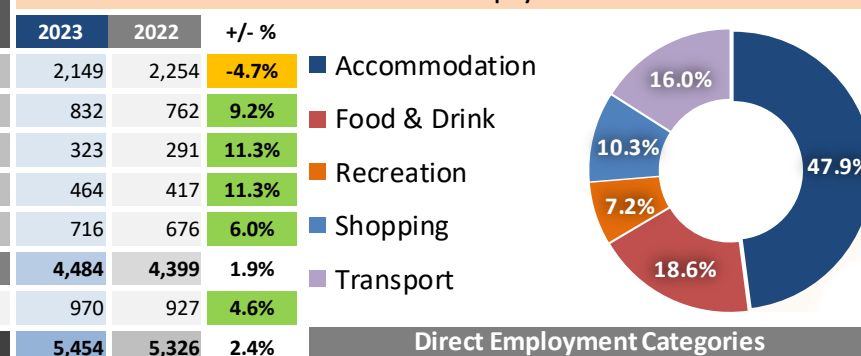
Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices



Sectors

	2023	2022	+/- %
Accommodation	2,149	2,254	-4.7%
Food & Drink	832	762	9.2%
Recreation	323	291	11.3%
Shopping	464	417	11.3%
Transport	716	676	6.0%
TOTAL DIRECT	4,484	4,399	1.9%
Indirect	970	927	4.6%
TOTAL	5,454	5,326	2.4%

Sectoral Distribution of Employment - FTEs



STEAM Comparative Headlines: 2019 and 2023 Covid Recovery (Unindexed)

STEAM REPORT FOR 2012-2023 - FINAL
CAIRNGORMS NATIONAL PARK AUTHORITY

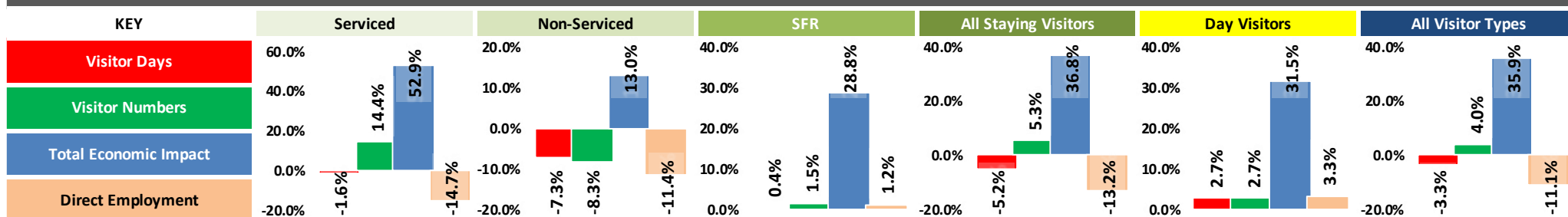
Comparing 2023 and 2019
All £'s Historic Prices

COMPARATIVE HEADLINES

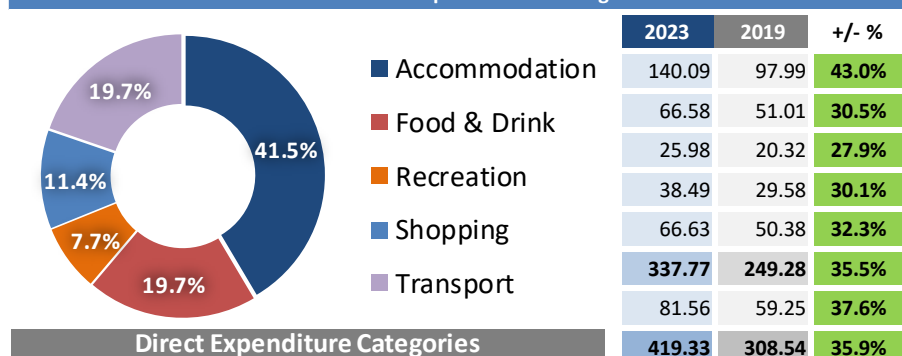
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2023 & 2019 - IN HISTORIC PRICES

KEY											Day Visitors			All Visitor Types		
		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors					
		Serviced			Non-Serviced											
		2023	2019	+/- %	2023	2019	+/- %	2023	2019	+/- %	2023	2019	+/- %	2023	2019	+/- %
Visitor Days	M	0.960	0.975	-1.6%	1.963	2.119	-7.3%	0.147	0.147	0.4%	3.070	3.240	-5.2%	1.098	1.069	2.7%
Visitor Numbers	M	0.671	0.587	14.4%	0.347	0.378	-8.3%	0.033	0.032	1.5%	1.051	0.998	5.3%	1.098	1.069	2.7%
Direct Expenditure	£M															
Economic Impact	£M	232.02	151.75	52.9%	114.28	101.15	13.0%	5.565	4.320	28.8%	351.86	257.22	36.8%	67.47	51.31	31.5%
Direct Employment	FTEs	2,158	2,531	-14.7%	1,629	1,838	-11.4%	53	52	1.2%	3,840	4,421	-13.2%	645	624	3.3%
Total Employment	FTEs															
														5,454	5,942	-8.2%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2023 & 2019 - IN HISTORIC PRICES



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



Sectors

	2023	2019	+/- %
Accommodation	2,149	2,769	-22.4%
Food & Drink	832	812	2.5%
Recreation	323	322	0.4%
Shopping	464	454	2.2%
Transport	716	689	3.9%
TOTAL DIRECT	4,484	5,045	-11.1%
Indirect	970	897	8.1%
TOTAL	5,454	5,942	-8.2%

Sectoral Distribution of Employment - FTEs

