Cairngorms National Park’s Visitor Economy 2018
This is a summary of the tourism trends research undertaken for Cairngorms National Park by Global Tourism Solutions (UK) Ltd.

- **1.9m Tourism Visits** to the national park area in 2018, up 4.7% on the previous year
- **914,500 visits** were made by visitors staying in the park as part of a holiday or short break up 29.7% since 2009, generating **3 million nights** in accommodation across the area

- **4 million Visitor Days and Nights** generated by staying and day visitors to the park in 2018
- **£270 million** was generated within the local economy through visitor and tourism business expenditure, an increase of 12% on the previous year

- **1,007,400 visits** made by Day Visitors to the park area in 2018
- **£47 million** for the economy of the park in 2018

- On average, visitors staying in the park stay **3.3 nights** in the region and spend **£78 million** on local accommodation

- Staying visitors generate a **total economic impact of £223 million** for businesses in the park

- Visitors to the park are vital to local businesses, supporting more than **4,800 full time equivalent jobs**, up 11% on 2009

- Economic impact increased by 16.5% between 2009 and 2018

- Total Visitor Numbers increased by 23% between 2009 and 2018

- Total Visitor Day and Nights increased by 28% between 2009 and 2018
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

Visitor Numbers

In 2018, there were an estimated 1.92m tourism visits to the park; representing an increase of 4.7% on the previous year. Overall, 48% of all visitors (914,500) stayed in the area for one or more nights (29% of those stayed in serviced accommodation; 17% in non-serviced), the remaining 52% of visitors (1,007,400) were Day Visitors to the park. Visitor numbers have increased steadily over the past ten years by 23%.

This is the first time since 2009 that Day Visitor have exceeded one million within the Cairngorms National Park. Over the past ten years, Day Visitors have increased by 18%, (with a corresponding gain of 42% during December). Over the same period, total Staying Visitor numbers have increased by 30% (with a corresponding gain of 68% for those staying in Non-serviced accommodation).

Key Figures: Visitor Numbers

<table>
<thead>
<tr>
<th>Year</th>
<th>Serviced</th>
<th>Non-Serviced</th>
<th>SFR</th>
<th>Staying Visitors</th>
<th>Day Visitors</th>
<th>All Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>0.565</td>
<td>0.318</td>
<td>0.032</td>
<td>0.914</td>
<td>1.007</td>
<td>1.922</td>
</tr>
<tr>
<td>2017</td>
<td>0.524</td>
<td>0.311</td>
<td>0.031</td>
<td>0.866</td>
<td>0.969</td>
<td>1.835</td>
</tr>
<tr>
<td>Change 17/18</td>
<td>%</td>
<td>7.7</td>
<td>2.1</td>
<td>3.6</td>
<td>5.6</td>
<td>4.0</td>
</tr>
</tbody>
</table>

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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 National Park spent an estimated 4 million days in the area as part of a tourism day trip, holiday or short break in 2018; a slight increase of 1.1% on the previous year and a 27.5% increase since 2009.

Staying visitors account for three-quarters (75%) of all visitor days, which is very high in comparison with other areas throughout Scotland, as is the high percent of non-serviced accommodation (47%). The average length of stay by all staying visitors to the park was 3.3 days; while non-serviced accommodation stands at 5.9 days indicating a high rate of weekly rentals.

Key Figures: Visitor Days

<table>
<thead>
<tr>
<th>Visitor Days</th>
<th>Serviced</th>
<th>Non-Serviced</th>
<th>SFR</th>
<th>Staying Visitors</th>
<th>Day Visitors</th>
<th>All Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>M 0.978</td>
<td>1.867</td>
<td>0.146</td>
<td>2.991</td>
<td>1.007</td>
<td>3.999</td>
</tr>
<tr>
<td>2017</td>
<td>M 0.945</td>
<td>1.900</td>
<td>0.142</td>
<td>2.987</td>
<td>0.969</td>
<td>3.956</td>
</tr>
<tr>
<td>Change 17/18</td>
<td>% 3.5</td>
<td>-1.8</td>
<td>3.1</td>
<td>0.1</td>
<td>4.0</td>
<td>1.1</td>
</tr>
</tbody>
</table>

Average length of stay in days for different visitor types in 2018

- **Day Visitors**: 1
- **All Visitors**: 2.1
- **Serviced Accommodation**: 1.7
- **Non-Serviced Accommodation**: 5.9
- **Staying with Friends/Relatives**: 4.6
- **All Staying Visitors**: 3.3
Economic Impact

Tourism visits to the Cairngorms National Park area in 2018 generated a total economic impact of £270.25 million, an increase of 12.1% on the previous year and an overall steady increase of 16.5% over the past ten years (all monetary figures in this narrative report are indexed, unless stated, to allow for direct comparison). The total economic impact in 2018 comprises the expenditure of visitors on goods and services, totalling £217.73m, and the indirect and induced economic effects of local businesses and residents spending tourism revenues locally, accounting for a further £52.52m.

The serviced accommodation sector again generated the highest (53%) economic impact, equating to £147.53 per person per day (pppd), followed by the non-serviced accommodation sector (28% / £39.92 pppd) and Day Visitors (17% / £46.91 pppd). The economic impact of the non-serviced sector has risen significantly by 56.4% since 2009, outstripping both the serviced or Day Visitor sectors.

### Key Figures: Economic Impact (Un-indexed)

<table>
<thead>
<tr>
<th>Economic Impact</th>
<th>Serviced</th>
<th>Non-Serviced</th>
<th>SFR</th>
<th>Staying Visitors</th>
<th>Day Visitors</th>
<th>All Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>£m</td>
<td>144.28</td>
<td>74.53</td>
<td>4.202</td>
<td>223.01</td>
<td>47.24</td>
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<td>2017</td>
<td>£m</td>
<td>119.61</td>
<td>74.97</td>
<td>3.840</td>
<td>198.42</td>
<td>42.76</td>
</tr>
<tr>
<td>Change 17/18</td>
<td>%</td>
<td>20.36</td>
<td>-0.6</td>
<td>9.4</td>
<td>12.4</td>
<td>10.5</td>
</tr>
</tbody>
</table>

### Average economic impact generated per person by each type of visitor in 2018

- **Day Visitors**
  - £46.91 per Day
  - £132.39 per Visit

- **Staying with Friends and Relatives**
  - £28.78 per Day
  - £132.39 per Visit

- **All Visitors**
  - £67.58 per Day
  - £141.92 per Visit

- **Non-Serviced Accommodation**
  - £39.92 per Day
  - £235.53 per Visit

- **All Staying Visitors**
  - £74.56 per Day
  - £246.05 per Visit

- **Serviced Accommodation**
  - £147.53 per Day
  - £250.79 per Visit
The expenditure and activity of visitors to the Cairngorms National Park in 2018 supported a total of 5,615 Full-Time Equivalent jobs (FTEs); this represents a slight decrease (-1.5%) within the tourism sector over the past year, but a steady rise of 10.6% since 2009. Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 4,800 FTEs, and the indirect and induced employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 815 FTEs. As with previous years, the largest sector for direct employment by far was related to Accommodation (2,645 FTEs) which has risen by 11.4% over the past ten years; followed by Food & Drink (771 FTEs); and then Transport (652 FTEs).

### Employment Supported by Tourism 2009-2018: Full-Time Equivalents (FTEs) by Type

<table>
<thead>
<tr>
<th>Sectors</th>
<th>2018</th>
<th>2009</th>
<th>+/- %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation</td>
<td>2,645</td>
<td>2,373</td>
<td>11.4%</td>
</tr>
<tr>
<td>Food &amp; Drink</td>
<td>771</td>
<td>703</td>
<td>9.6%</td>
</tr>
<tr>
<td>Recreation</td>
<td>306</td>
<td>277</td>
<td>10.5%</td>
</tr>
<tr>
<td>Shopping</td>
<td>426</td>
<td>379</td>
<td>12.5%</td>
</tr>
<tr>
<td>Transport</td>
<td>652</td>
<td>599</td>
<td>8.9%</td>
</tr>
<tr>
<td>TOTAL DIRECT</td>
<td>4,800</td>
<td>4,331</td>
<td>10.8%</td>
</tr>
<tr>
<td>Indirect</td>
<td>815</td>
<td>744</td>
<td>9.6%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>5,615</td>
<td>5,075</td>
<td>10.6%</td>
</tr>
</tbody>
</table>

#### Sectoral Distribution of Employment - FTEs

- **Accommodation:** 47.1%
- **Food & Drink:** 14.5%
- **Recreation:** 11.6%
- **Shopping:** 7.6%
- **Transport:** 5.5%
- **Indirect:** 13.7%

Definitions:

- **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.