



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



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

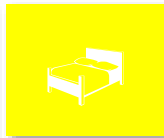


Day Visits generated **£47 million** for the economy of the park in 2018

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



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



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

2009
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

Staying Visitors

48% of Visits

Day Visitors

52% of Visits

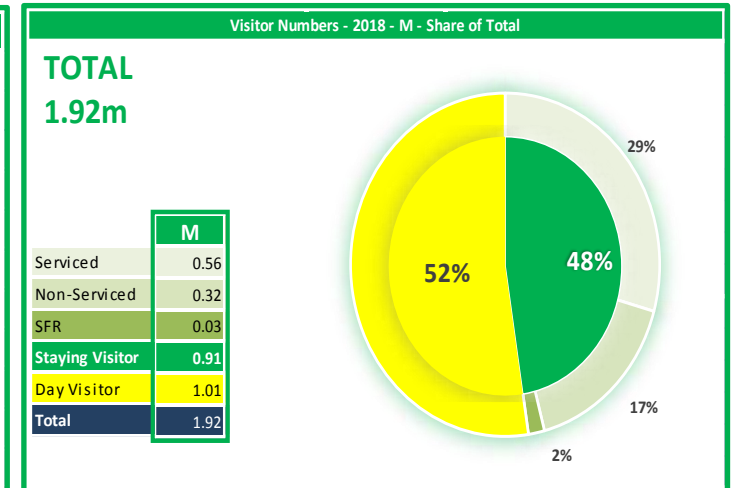
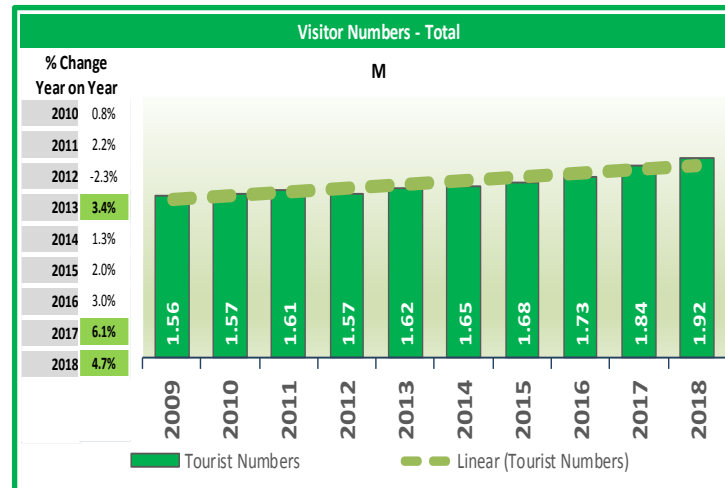
Total
Visitor
Numbers
1.92m

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

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2018	M	0.565	0.318	0.032	0.914	1.007	1.922
2017	M	0.524	0.311	0.031	0.866	0.969	1.835
Change 17/18	%	7.7	2.1	3.6	5.6	4.0	4.7

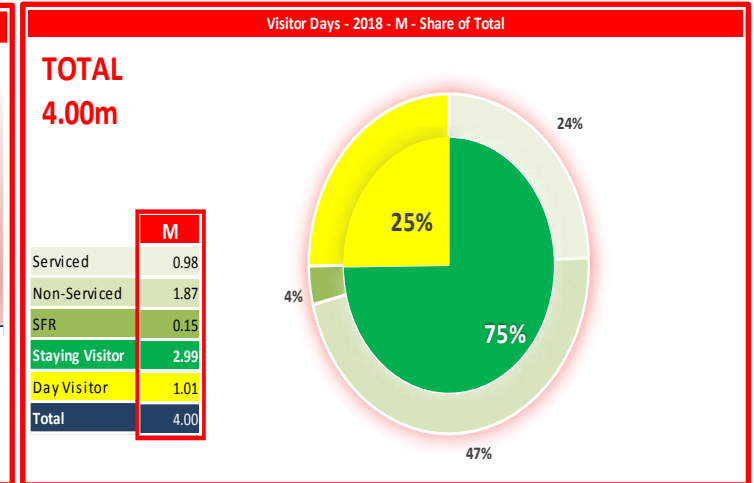
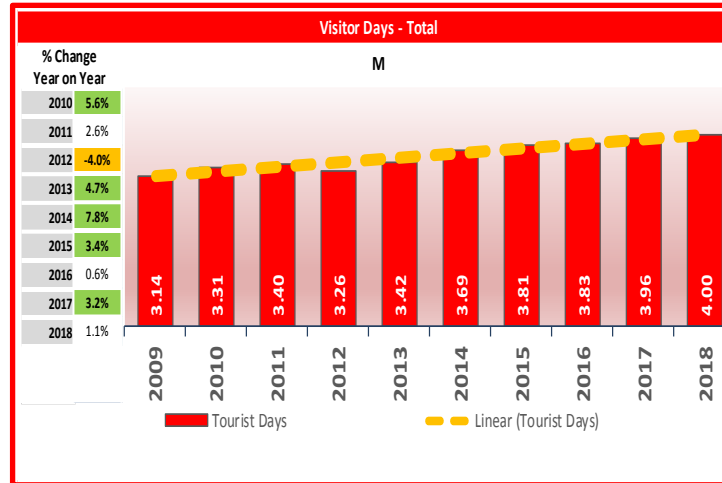
**Total
Visitor
Days**
4m

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**

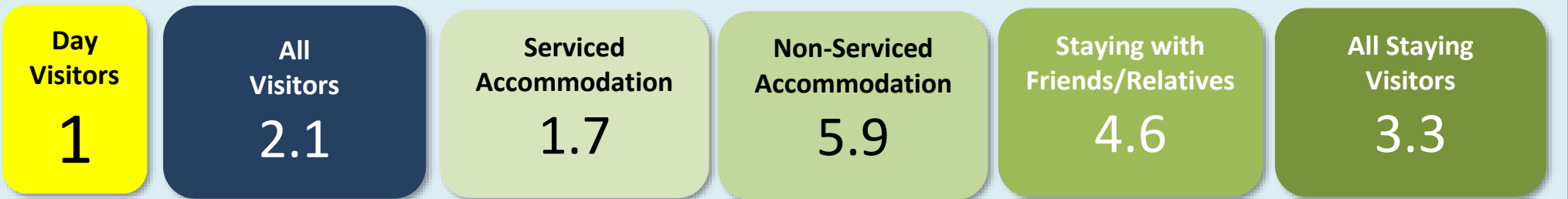
(75%) of all visitor days, which is very high in comparison with other areas throughout Scotland, as is the high percent of non-serviced accommodation (47%). The average length of stay by all staying visitors to the park was 3.3 days; while non-serviced accommodation stands at 5.9 days indicating a high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



Key Figures: Visitor Days

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

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

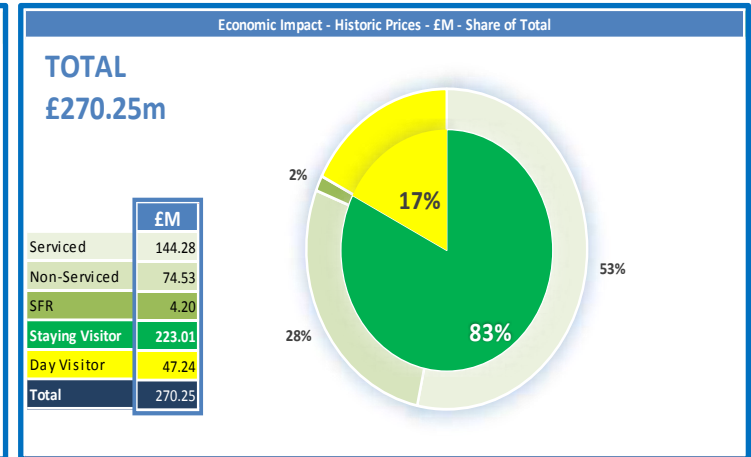
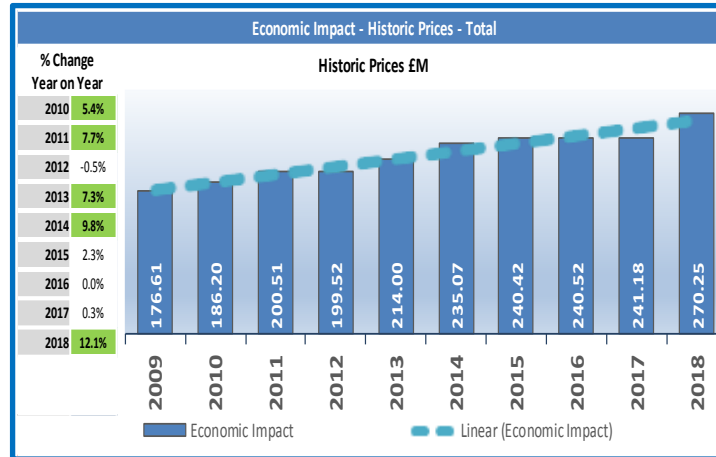


Total Economic Impact
£270m

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)

Economic Impact		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2018	£m	144.28	74.53	4.202	223.01	47.24	270.25
2017	£m	119.61	74.97	3.840	198.42	42.76	241.18
Change 17/18	%	20.36	-0.6	9.4	12.4	10.5	12.1

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



**Total
FTEs
Supported
in 2018
5,615**

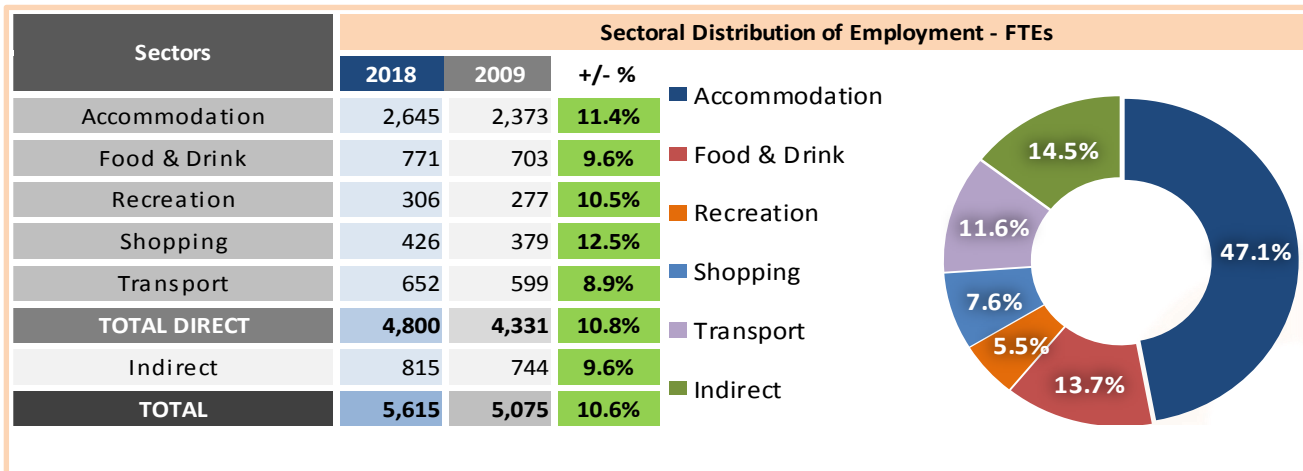
Definitions:

- **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.

Employment Supported by Tourism

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




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2019