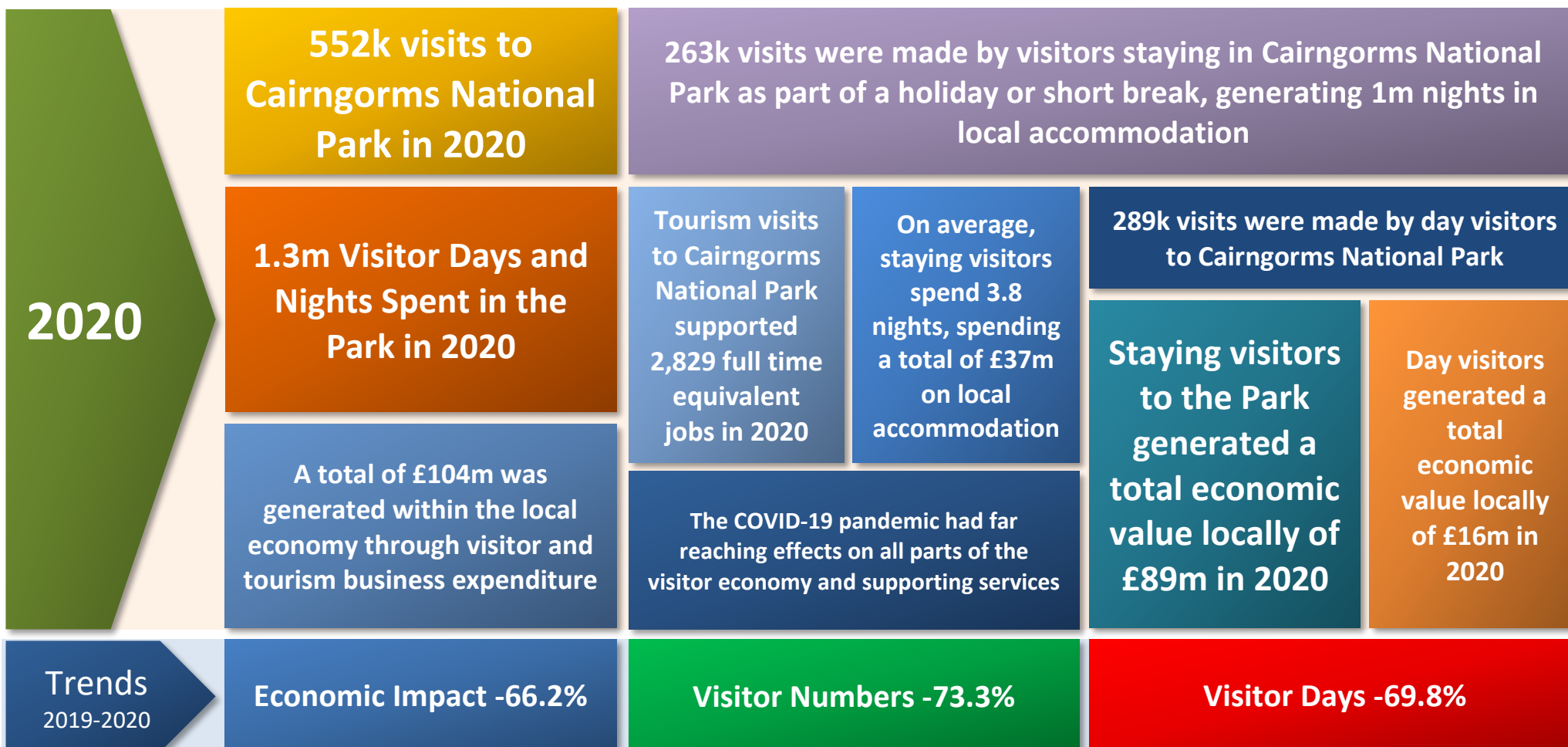


The Visitor Economy of Cairngorms National Park

This is a summary of the annual tourism economic impact research undertaken for Cairngorms National Park for the calendar year 2020, with comparisons to 2019. For context, trends from 2009-2020 are also shown. Outputs in this report have been generated using STEAM, the tourism specific economic impact model, owned and operated by Global Tourism Solutions (UK) Ltd.

Due to the significant disruption to the visitor economy caused by the COVID-19 pandemic, outputs for 2020 are not reflective of usual economic outputs for the area.



2020

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

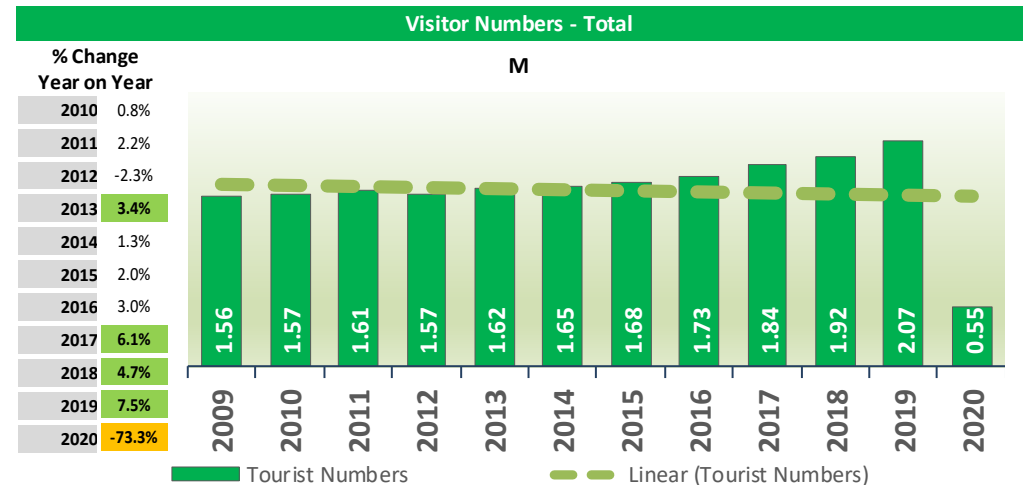
52% of Visits

Tourism Visits

In 2020, Cairngorms National Park received 551,470 tourism visits

There were an estimated 551,470 tourism visits to Cairngorms National Park in 2020, down 73.3% on the previous year. Between 2009 and 2019 the area had seen the total number of visits rise by 32% to a total of 2.07m visits. The significant drop off in trade, accounted for by the COVID-19 pandemic, affected all parts of the visitor economy, with the area's serviced accommodation sector suffering the largest fall in trade (-75.1%) between 2019 and 2020, followed by day visitors (-73.0%) and the non-serviced accommodation sector (-71.9%).

Day visitors accounted for 52% of all visits made to the area, but there were difficulties in tracking day visitor numbers during the pandemic. As a result, day visitors (and wild campers) who stayed away from retail outlets and closed visitor attractions, will have been under-represented. While both the day visitor and serviced accommodation sector continued to struggle throughout the year, the non-serviced accommodation sector did partially recover, but total visitor numbers again reduced in all sectors as restrictions were re-introduced.



Key Figures: Visitor Numbers: 2020

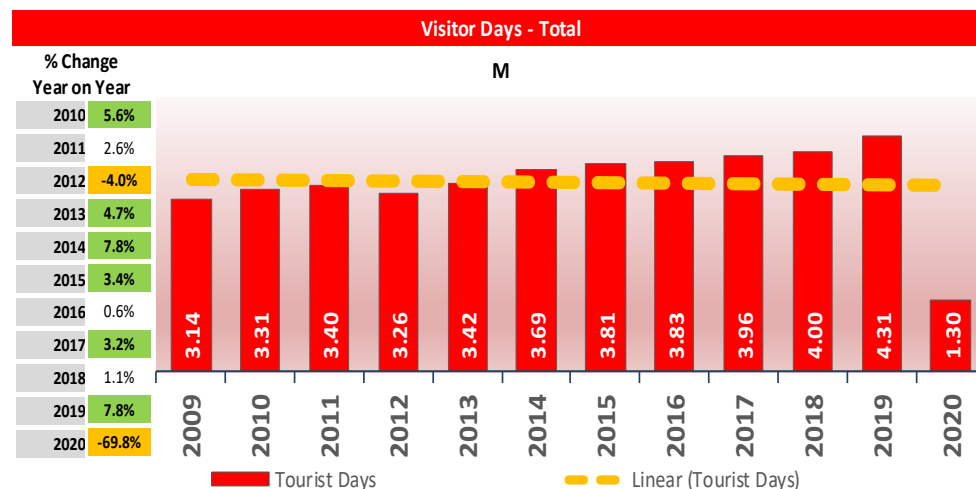
Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2020 (thousands)	000s	146.27	106.34	10.35	262.96	288.51	551.47
2019 (thousands)	000s	586.88	378.45	32.37	997.71	1,069.12	2,066.83
Change 19/20 (%)	%	-75.1	-71.9	-68.0	-73.6	-73.0	-73.3
Share of Total (%)	%	27	19	2	48	52	100

Visitor Days and Nights

In 2020, visitors generated 1,301,090 days and nights spent locally

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 not only account for five visitors, but also fifteen visitor days.

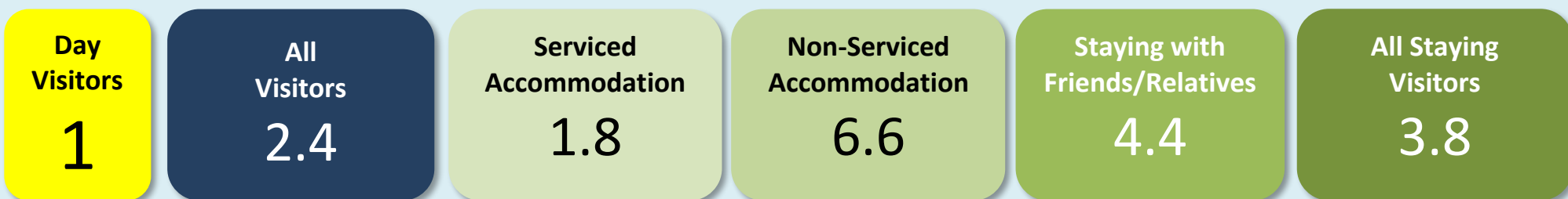
Despite the significant challenges posed by the COVID-19 pandemic, 1,301,090 visitor days were spent in the Park in 2020 (4.3m were spent in 2019). Staying visitors to the Cairngorms generated 1,012,580 days in the area, and day visitors spent an additional estimated 288,510 tourism day visits to the area during 2020. The effect of the pandemic on visiting behaviour and operating conditions meant that many visitor facilities were closed for significant periods and events and activities, including snow sports, that would ordinarily happen did not occur. A host of businesses which would ordinarily be bringing visitors into the area, were closed due to restrictions. As a result, staying visitor days were down significantly by 68.7% for the year, with day visitors down by 73.0%.



Key Figures: Visitor Days: 2020

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2020 (thousands)	000s	260.88	705.64	46.05	1,012.58	288.51	1,301.09
2019 (thousands)	000s	975.03	2,118.54	146.66	3,240.23	1,069.12	4,309.34
Change 19/20 (%)	%	-73.2	-66.7	-68.6	-68.7	-73.0	-69.8
Share of Total (%)	%	20	54	4	78	22	100

Average length of stay in days for different visitor types to Cairngorms National Park in 2020

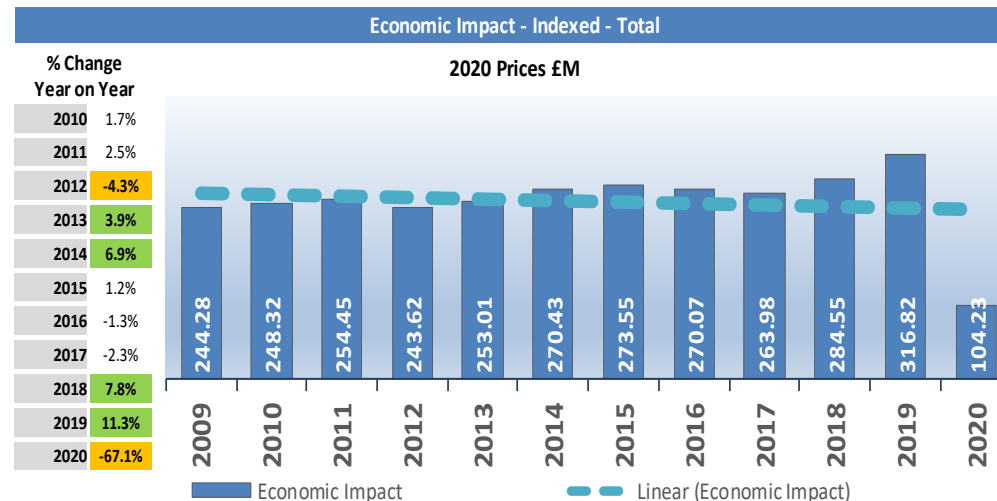


Total Economic Value

In 2020, the visitor economy was worth a total of £104m

By 2019, the annual value of tourism activity had grown steadily since 2009 by 30% to £317m (all monetary figures in this narrative report are indexed, unless stated, to allow direct comparison). Between 2019 and 2020, however, tourism activity in the Cairngorms National Park was substantially affected by the COVID-19 pandemic and as such, the economic impact of tourism was estimated to have fallen substantially by -66.2% to a figure of £104.23m.

The total economic impact in 2020 comprised the expenditure of visitors on goods and services, totalling £84.22m, and the *indirect* and *induced* economic effects of local businesses and residents spending tourism revenues locally, accounting for a further £20.02m. The economic impact was especially noticeable within serviced accommodation, which saw a drop of -65.7% on the previous year, resulting in a loss of around £100m, with an addition loss of 66m within the non-serviced accommodation sector, which experienced a drop of -65.3%.



Key Figures: Economic Impact (historic prices): 2020

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2020 (£ Millions)	£M	52.10	35.09	1.318	88.51	15.73	104.23
2019 (£ Millions)	£M	151.75	101.15	4.320	257.22	51.31	308.54
Change 19/20 (%)	%	-65.7	-65.3	-69.5	-65.6	-69.4	-66.2
Share of Total (%)	%	50	34	1	85	15	100

Average economic impact generated per person by each type of visitor to Cairngorms National Park in 2020

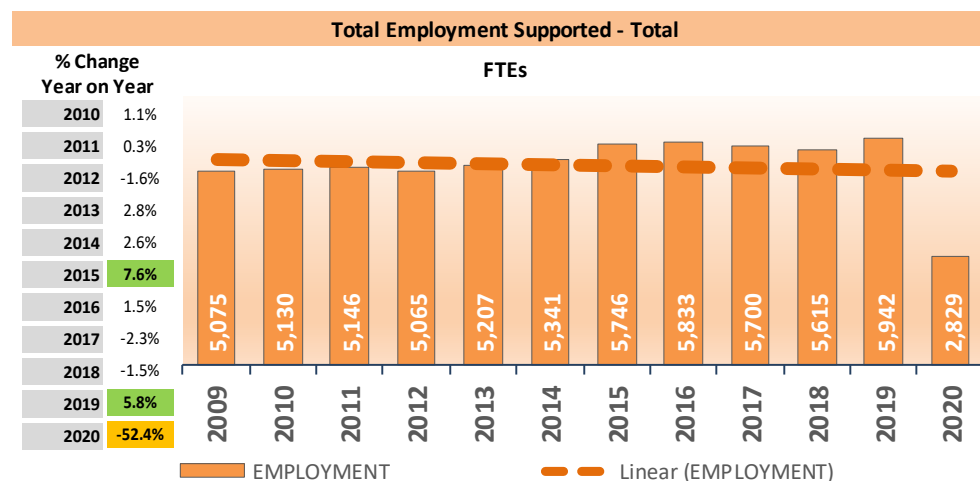


Employment Supported

In 2020, the visitor economy supported 2,829 Full Time Equivalent jobs

The expenditure and activity of visitors to the Park supported a total of 2,829 Full-Time Equivalent jobs (FTEs) in 2020, a drop of -52.4% from a total of 5,942 FTEs in 2019. Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 2,517 FTEs, and a further 312 indirect and induced jobs supported through local businesses.

The furlough scheme was an important employment support mechanism for the visitor economy during the pandemic. FTEs supported by the scheme are not included in the STEAM estimated employment totals for 2020 as they were not directly or indirectly supported by the activity of visitors, but rather through government subsidy. Survey data for UK visitor destinations suggests relatively low incidence of redundancy, due to the presence of the furlough scheme although it is important to note that not all sectors / employment would have been supported by the scheme.



Key Figures: Employment: 2020

Employment Supported by Sector 2020	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	1,775	271	115	138	218	2,517	312	2,829

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.



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2021

STEAM Comparative Headlines: 2019 and 2020

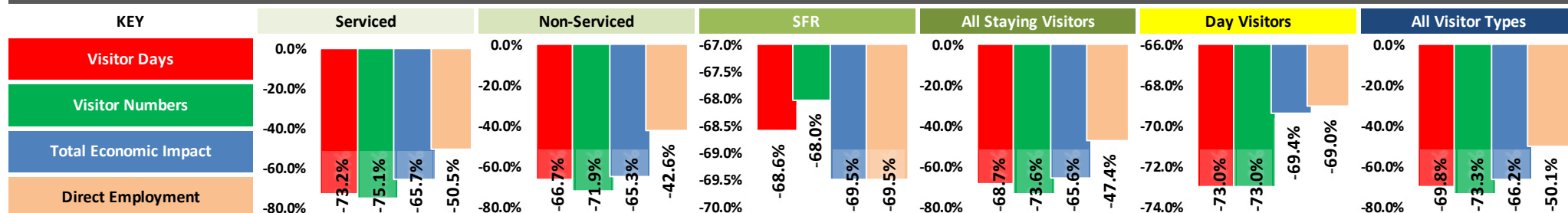
Due to the significant disruption to the visitor economy caused by the COVID-19 pandemic, outputs for 2020 are not reflective of usual economic outputs for the area.

STEAM FINAL TREND REPORT FOR 2009-2020										Comparing 2020 and 2019			COMPARATIVE HEADLINES		
CAIRNGORMS NATIONAL PARK										All £'s Historic Prices					

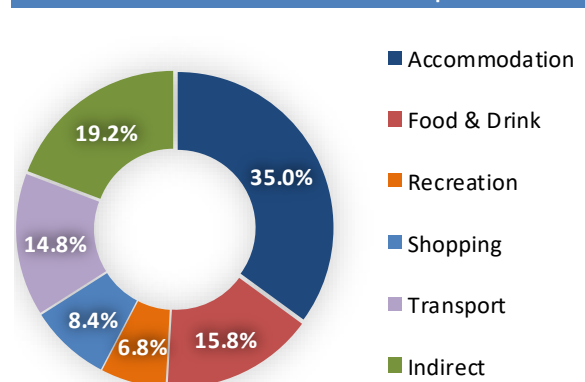
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2020 & 2019 - IN HISTORIC PRICES

KEY	Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced																	
	2020	2019	+/- %	2020	2019	+/- %	2020	2019	+/- %	2020	2019	+/- %	2020	2019	+/- %	2020	2019	+/- %			
Visitor Days 000s	260.88	975.03	-73.2%	705.64	2,118.54	-66.7%	46.05	146.66	-68.6%	1,012.58	3,240.23	-68.7%	288.51	1,069.12	-73.0%	1,301.09	4,309.34	-69.8%			
Visitor Numbers 000s	146.27	586.88	-75.1%	106.34	378.45	-71.9%	10.35	32.37	-68.0%	262.96	997.71	-73.6%	288.51	1,069.12	-73.0%	551.47	2,066.83	-73.3%			
Direct Expenditure £M																84.22	249.28	-66.2%			
Economic Impact £M	52.10	151.75	-65.7%	35.09	101.15	-65.3%	1.318	4.320	-69.5%	88.51	257.22	-65.6%	15.73	51.31	-69.4%	104.23	308.54	-66.2%			
Direct Employment FTEs	1,252	2,531	-50.5%	1,055	1,838	-42.6%	16	52	-69.5%	2,323	4,421	-47.4%	193	624	-69.0%	2,517	5,045	-50.1%			
Total Employment FTEs																2,829	5,942	-52.4%			

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2020 & 2019 - IN HISTORIC PRICES



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

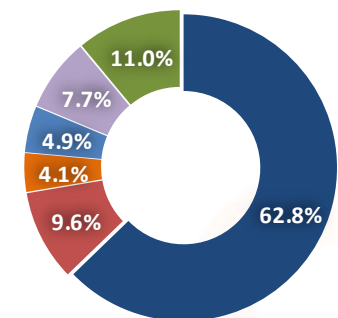


	2020	2019	+/- %
Accommodation	36.53	97.99	-62.7%
Food & Drink	16.51	51.01	-67.6%
Recreation	7.038	20.32	-65.4%
Shopping	8.709	29.58	-70.6%
Transport	15.43	50.38	-69.4%
TOTAL DIRECT	84.22	249.28	-66.2%
Indirect	20.02	59.25	-66.2%
TOTAL	104.23	308.54	-66.2%

Sectors	2020	2019	+/- %
Accommodation	1,775	2,769	-35.9%
Food & Drink	271	812	-66.6%
Recreation	115	322	-64.3%
Shopping	138	454	-69.7%
Transport	218	689	-68.4%
TOTAL DIRECT	2,517	5,045	-50.1%
Indirect	312	897	-65.2%
TOTAL	2,829	5,942	-52.4%

Sectoral Distribution of Employment - FTEs

	2020	2019	+/- %
Accommodation	1,775	2,769	-35.9%
Food & Drink	271	812	-66.6%
Recreation	115	322	-64.3%
Shopping	138	454	-69.7%
Transport	218	689	-68.4%
TOTAL DIRECT	2,517	5,045	-50.1%
Indirect	312	897	-65.2%
TOTAL	2,829	5,942	-52.4%



STEAM Comparative Headlines: 2009 to 2019

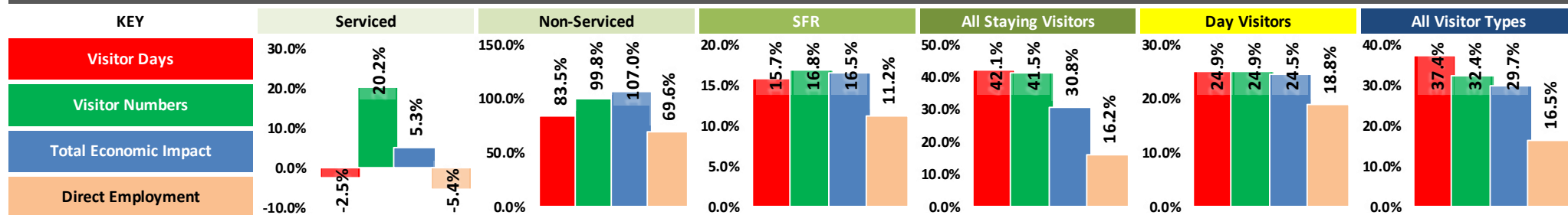
Outputs for the period to 2019 show recent performance levels in the area prior to the COVID-19 pandemic.

STEAM FINAL TREND REPORT FOR 2009-2020										Comparing 2019 and 2009			COMPARATIVE HEADLINES					
CAIRNGORMS NATIONAL PARK										2009 in 2019 prices (1.347)								

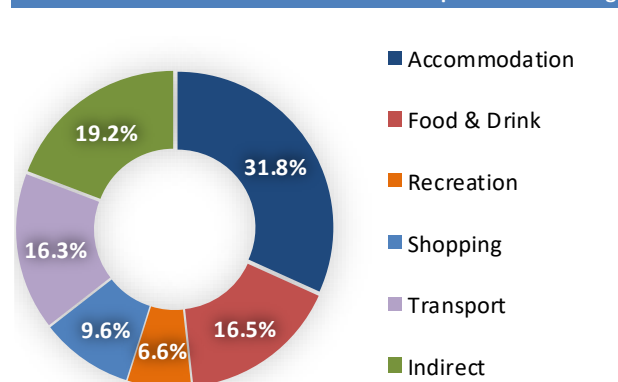
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2019 & 2009 - INDEXED TO 2019

KEY		Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced			2019	2009	+/- %	2019	2009	+/- %	2019	2009	+/- %	2019	2009	+/- %	2019	2009	+/- %
		2019	2009	+/- %	2019	2009	+/- %															
Visitor Days	M	0.975	1.000	-2.5%	2.119	1.154	83.5%	0.147	0.127	15.7%	3.240	2.281	42.1%	1.069	0.856	24.9%	4.309	3.137	37.4%			
Visitor Numbers	M	0.587	0.488	20.2%	0.378	0.189	99.8%	0.032	0.028	16.8%	0.998	0.705	41.5%	1.069	0.856	24.9%	2.067	1.561	32.4%			
Direct Expenditure	£M																249.28	190.99	30.5%			
Economic Impact	£M	151.75	144.11	5.3%	101.15	48.87	107.0%	4.320	3.708	16.5%	257.22	196.69	30.8%	51.31	41.20	24.5%	308.54	237.89	29.7%			
Direct Employment	FTEs	2,531	2,675	-5.4%	1,838	1,084	69.6%	52	47	11.2%	4,421	3,806	16.2%	624	525	18.8%	5,045	4,331	16.5%			
Total Employment	FTEs																5,942	5,075	17.1%			

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2019 & 2009 - INDEXED TO 2019



Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2019



Sectors	2019	2009	+/- %
Accommodation	97.99	66.75	46.8%
Food & Drink	51.01	42.17	21.0%
Recreation	20.32	16.71	21.6%
Shopping	29.58	23.57	25.5%
Transport	50.38	41.80	20.5%
TOTAL DIRECT	249.28	190.99	30.5%
Indirect	59.25	46.90	26.3%
TOTAL	308.54	237.89	29.7%

Sectoral Distribution of Employment - FTEs

