

The Visitor Economy of The Cairngorms National Park

This is a summary of the annual tourism economic impact research undertaken for the Cairngorms National Park for the calendar year 2022. Outputs in this report have been generated using STEAM, the tourism specific local economic impact model, owned and operated by Global Tourism Solutions (UK) Ltd.

COVID-19 Pandemic

Some STEAM outputs for 2022 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.



2022

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

51.5% of Visits

Day Visitors

48.5% of Visits

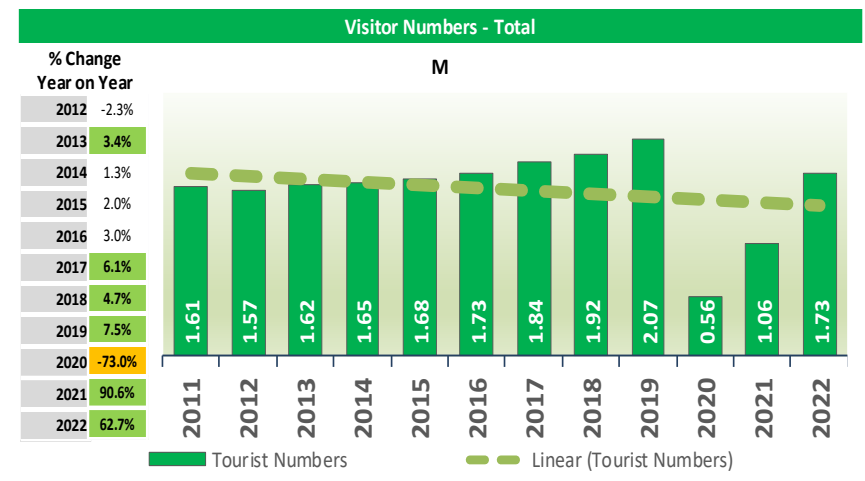
**Total
Visitor
Numbers
1.73m**

Visitor Numbers

There were an estimated 1.73m tourism visits to the Cairngorms National Park in 2022. Between 2012 and 2019 the Park had seen the total number of visits by rise by 31.6% to a pre-covid total of 2.07m, so visitor numbers in 2022 are still recovering to pre-covid levels.

In 2022, .89m visitors stayed in some sort of accommodation within the area. This sector, as a whole, saw a substantial increase of 58.6% compared to 2021, this continues the steady recovery we saw last year, and the sector is now -10.6% below pre-covid 2019 figures. Serviced accommodation rose substantially by 79.3% over the last year and is now just slightly below (-3.9%) pre-covid levels.

The non-serviced accommodation sector also continues a steady recovery, gaining 30% last year, but is still -21.3% below pre-covid figures. It should be noted that serviced accommodation supply has decreased in the aftermath of covid, which will act to dampen down the National Park's recovery post covid. While the Park's staying visitor numbers are gaining steadily, or have almost caught up on pre-covid levels, the day visitor sector has lagged slightly behind, as it has in many parts of the country, especially in rural locations. Despite growing significantly by 67.3% in 2022, it is still -21.5% below pre-covid levels.



Key Figures: Visitor Numbers 2022

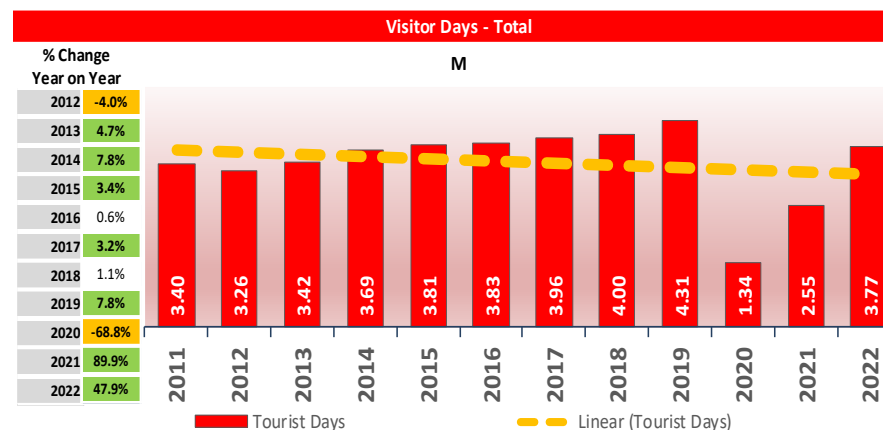
Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (Millions)	M	0.564	0.298	0.030	0.892	0.839	1.731
2021 (Millions)	M	0.314	0.229	0.018	0.562	0.502	1.064
Change 21/22 (%)	%	+79.3	+30.0	+63.7	+58.6	+67.3	+62.7
Share of Total (%)	%	32.6	17.2	1.7	51.5	48.5	100.0

**Total
Visitor
Days
3.77m**

Visitor Days

Visitors spent an estimated 3.77m days in the Cairngorms National Park during 2022. 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 3.3 days in the area.

Total staying visitors accounted for 2.93m visitor days in 2022, an increase of 43.2% on 2021; they are now just -9.5% below pre-covid 2019 figures. The serviced accommodation sector saw a substantial increase of 78.4% when compared to 2021 and is now 1.5% above figures reported in 2019. The non-serviced sector has recovered to -14.7% below pre-covid levels with an increase 28.7% compared to 2021, evidencing a steady recovery for both staying visitor sectors. While staying visitor numbers are hovering around pre-covid levels, day visitor numbers are still below pre-covid levels. They have increased year-on-year since 2019, and by 67.3% since 2021; they are still -21.5% below pre-covid day visitor numbers, matching a general negative day visitor trend seen throughout the rest of Scotland and the UK to varying degrees.



Key Figures: Visitor Days 2022

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (Millions)	M	0.989	1.808	0.136	2.933	0.839	3.772
2021 (Millions)	M	0.554	1.405	0.089	2.049	0.502	2.550
Change 21/22 (%)	%	+78.4	+28.7	+51.8	+43.2	+67.3	+47.9
Share of Total (%)	%	26.2	47.9	3.6	77.8	22.2	100.0

Average Length of Stay for Different Visitor Types: 2022



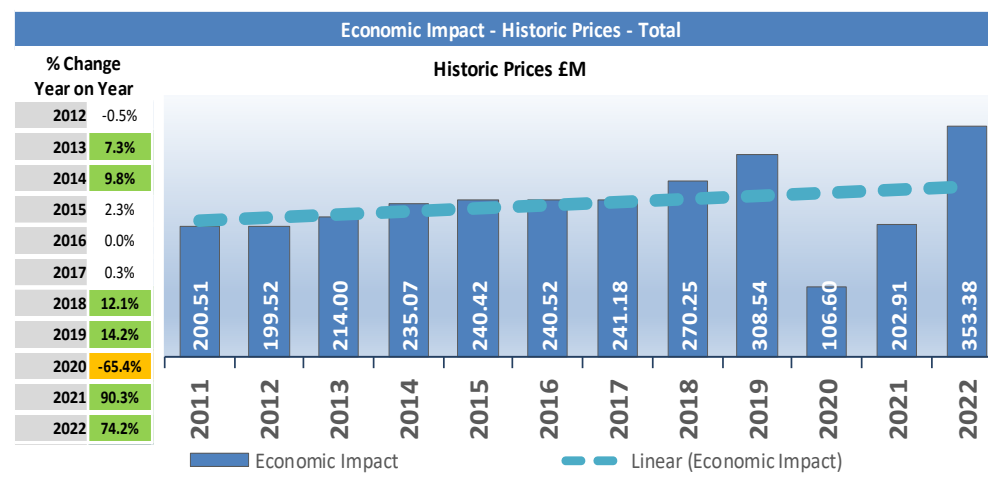
**Total
Economic
Impact
£353m**

Economic Impact

The value of tourism activity in the Cairngorms National Park was estimated to be £353m in 2022 (a substantial increase of 74.2% (61.5% indexed) on the previous year). In comparison, the Park's visitor economy was worth £308m in 2019, so the economic impact of tourism is now well above pre-covid levels by 14.5% which is positive news.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £284m. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were conservatively

estimated to account for a further £69m, together totalling £353m. The largest visitor spending sector was Accommodation (£124m), then Transport (£55m), closely followed by Food & Drink (£54m). In 2022, the Park's day visitor market accounted for just 12.9% of the value of tourism activity at £45.5m, just -11.2% below pre-covid economic activity. Meanwhile, the staying visitor market accounted for the remaining 87.1% of economic value at £308m, and as such is above pre-covid levels by 19.7%, boosted in part by a strong recovery in the Park's serviced sector which is now 37.4% above pre-covid levels reported in 2019.



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

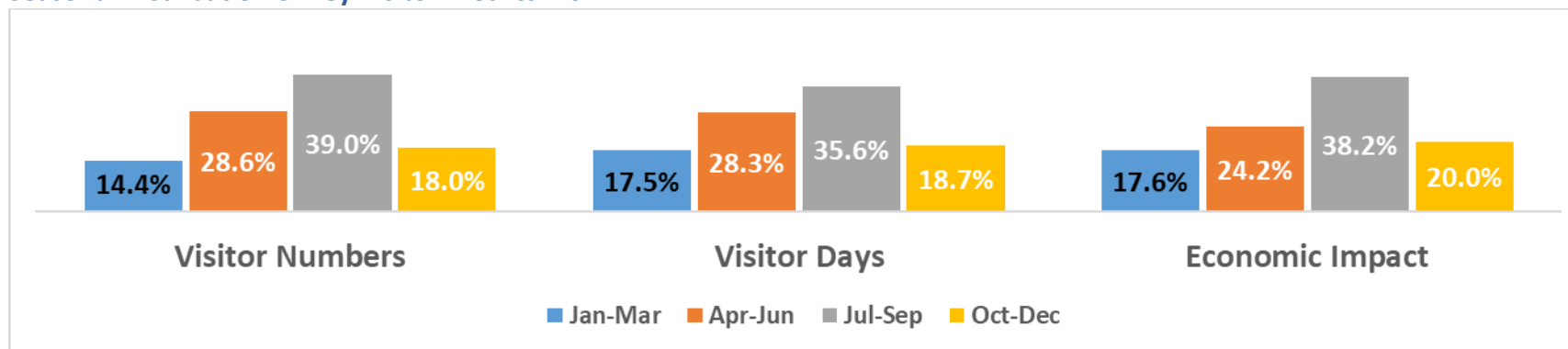
Key Figures: Economic Impact 2022

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (£ Millions)	£M	208.550	94.778	4.505	307.833	45.547	353.380
2021 (£ Millions)	£M	104.820	70.451	2.462	177.733	25.177	202.909
Change 21/22 (%)	%	+99.0	+34.5	+83.0	+73.2	+80.9	+74.2
Share of Total (%)	%	59.0	26.8	1.3	87.1	12.9	100.0

Average Economic Impact Generated by Each Type of Visitor: 2022

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	£ 210.79	£ 52.42	£ 33.16	£ 104.95	£ 54.28	£ 93.68
Economic Impact per Visit	£ 369.92	£ 318.08	£ 149.37	£ 345.14	£ 54.28	£ 204.15

Seasonal Distribution of Key Visitor Metrics: 2022



**Total
FTEs
Supported
5,326**

Employment Supported by Tourism

The expenditure and activity of visitors to the Cairngorms National Park supported a total of 5,326 Full-Time Equivalent jobs (FTEs) in 2022; an increase of 37.4% on the year before, driven largely by gains in the serviced accommodation sector over the same period.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 4,399 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 927 FTEs. The accommodation sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 2,254 FTEs, followed by Food & Drink at 762 FTEs.

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2022

Employment Supported by Sector 2022	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	2,254	762	291	417	676	4,399	927	5,326

STEAM Comparative Headlines: 2021 and 2022

STEAM REPORT FOR 2011-2022 - FINAL
CAIRNGORMS NATIONAL PARK AUTHORITY

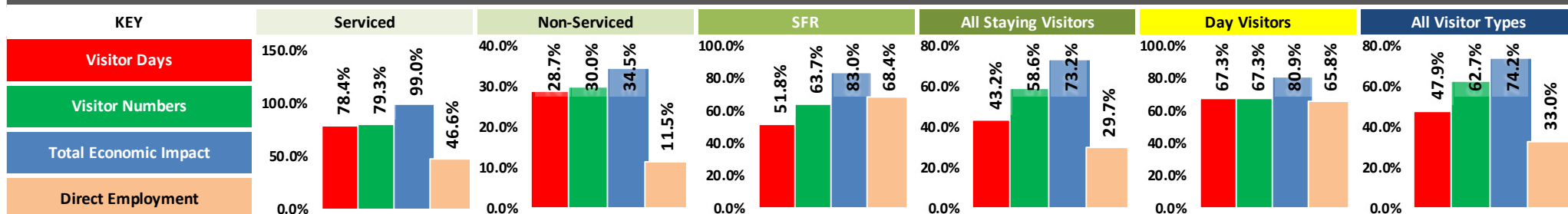
Comparing 2022 and 2021
All £'s Historic Prices

COMPARATIVE HEADLINES

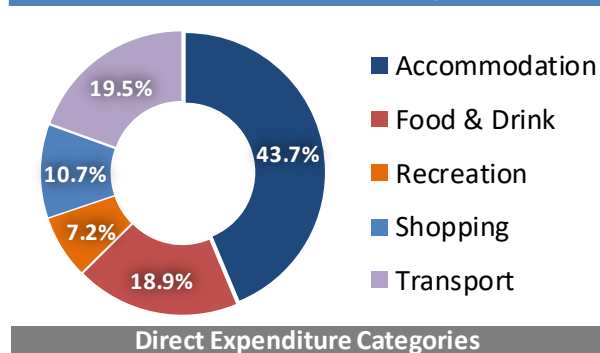
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2022 & 2021 - IN HISTORIC PRICES

KEY		Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types					
		Serviced			Non-Serviced																	
		2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %
Visitor Days	M	0.989	0.554	78.4%	1.808	1.405	28.7%	0.136	0.089	51.8%	2.933	2.049	43.2%	0.839	0.502	67.3%	3.772	2.550	47.9%			
Visitor Numbers	M	0.564	0.314	79.3%	0.298	0.229	30.0%	0.030	0.018	63.7%	0.892	0.562	58.6%	0.839	0.502	67.3%	1.731	1.064	62.7%			
Direct Expenditure	£M																284.64	163.99	73.6%			
Economic Impact	£M	208.55	104.82	99.0%	94.78	70.45	34.5%	4.505	2.462	83.0%	307.83	177.73	73.2%	45.55	25.18	80.9%	353.38	202.91	74.2%			
Direct Employment	FTEs	2,224	1,516	46.6%	1,633	1,465	11.5%	49	29	68.4%	3,905	3,010	29.7%	494	298	65.8%	4,399	3,308	33.0%			
Total Employment	FTEs																5,326	3,877	37.4%			

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2022 & 2021 - IN HISTORIC PRICES



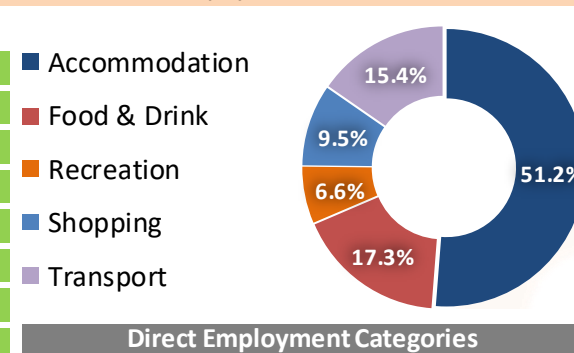
Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices



	2022	2021	+/- %
Accommodation	124.37	75.74	64.2%
Food & Drink	53.78	29.48	82.4%
Recreation	20.58	11.82	74.2%
Shopping	30.48	17.11	78.2%
Transport	55.43	29.85	85.7%
TOTAL DIRECT	284.64	163.99	73.6%
Indirect	68.74	38.92	76.6%
TOTAL	353.38	202.91	74.2%

Sectors	2022	2021	+/- %
Accommodation	2,254	2,027	11.2%
Food & Drink	762	453	68.3%
Recreation	291	181	60.6%
Shopping	417	253	64.3%
Transport	676	394	71.4%
TOTAL DIRECT	4,399	3,308	33.0%
Indirect	927	569	63.0%
TOTAL	5,326	3,877	37.4%

Sectoral Distribution of Employment - FTEs



STEAM Comparative Headlines: 2019 and 2022 Covid Recovery

STEAM REPORT FOR 2011-2022 - FINAL
CAIRNGORMS NATIONAL PARK AUTHORITY

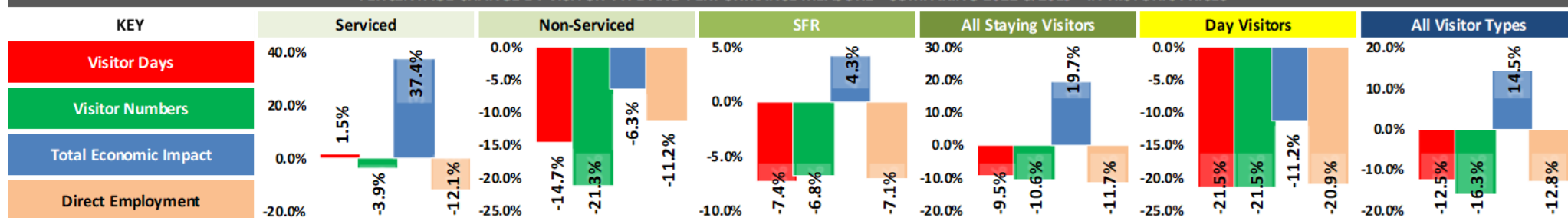
Comparing 2022 and 2019
All £'s Historic Prices

COMPARATIVE HEADLINES

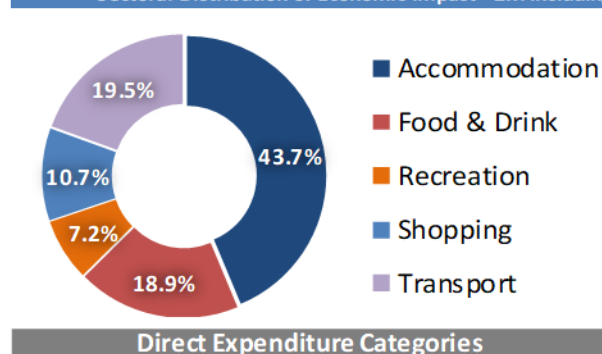
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2022 & 2019 - IN HISTORIC PRICES

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		2022	2019	+/- %	2022	2019	+/- %	2022	2019	+/- %	2022	2019	+/- %	2022	2019	+/- %	2022	2019	+/- %
Visitor Days	M	0.989	0.975	1.5%	1.808	2.119	-14.7%	0.136	0.147	-7.4%	2.933	3.240	-9.5%	0.839	1.069	-21.5%	3.772	4.309	-12.5%
Visitor Numbers	M	0.564	0.587	-3.9%	0.298	0.378	-21.3%	0.030	0.032	-6.8%	0.892	0.998	-10.6%	0.839	1.069	-21.5%	1.731	2.067	-16.3%
Direct Expenditure	£M																284.64	249.28	14.2%
Economic Impact	£M	208.55	151.75	37.4%	94.78	101.15	-6.3%	4.505	4.320	4.3%	307.83	257.22	19.7%	45.55	51.31	-11.2%	353.38	308.54	14.5%
Direct Employment	FTEs	2,224	2,531	-12.1%	1,633	1,838	-11.2%	49	52	-7.1%	3,905	4,421	-11.7%	494	624	-20.9%	4,399	5,045	-12.8%
Total Employment	FTEs																5,326	5,942	-10.4%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2022 & 2019 - IN HISTORIC PRICES



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

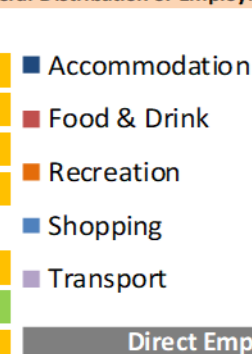


	2022	2019	+/- %
Accommodation	124.37	97.99	26.9%
Food & Drink	53.78	51.01	5.4%
Recreation	20.58	20.32	1.3%
Shopping	30.48	29.58	3.0%
Transport	55.43	50.38	10.0%
TOTAL DIRECT	284.64	249.28	14.2%
Indirect	68.74	59.25	16.0%
TOTAL	353.38	308.54	14.5%

Sectors

	2022	2019	+/- %
Accommodation	2,254	2,769	-18.6%
Food & Drink	762	812	-6.1%
Recreation	291	322	-9.8%
Shopping	417	454	-8.2%
Transport	676	689	-2.0%
TOTAL DIRECT	4,399	5,045	-12.8%
Indirect	927	897	3.3%
TOTAL	5,326	5,942	-10.4%

Sectoral Distribution of Employment - FTEs



Direct Employment Categories