



Cairngorms National Park's Visitor Economy 2019

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

2.1m Tourism Visits
to the national park area in 2019
up **7.5%** on the previous year

998,000 visits were made by visitors **staying in the park**
as part of a holiday or short break **up 41% since 2009**, generating
3.2 million nights in accommodation across the area

4.3 million Visitor Days and Nights
generated by **staying and day visitors** to the park in
2019

£308.5 million was generated within the local economy through visitor and tourism business expenditure, **an increase of 14% on the previous year**

1,069,000 visits made by **Day Visitors** to the park area in 2019



£ **Day Visits** generated **£51 million** for the economy of the park in 2019

On average, visitors **staying** in the park stay **3.3 nights** in the region and spend **£98 million** on local accommodation

Visitors to the park are vital to local businesses, supporting more than **5,942 full time equivalent jobs**, up **17%** on 2009



Staying visitors generate a **total economic impact of £257 million** for businesses in the park



Economic impact increased by 30% between 2009 and 2019

Total Visitor Numbers increased by 32% between 2009 and 2019

Total Visitor Day and Nights increased by 37% between 2009 and 2019

2009
2019

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
2.07m

Visitor Numbers

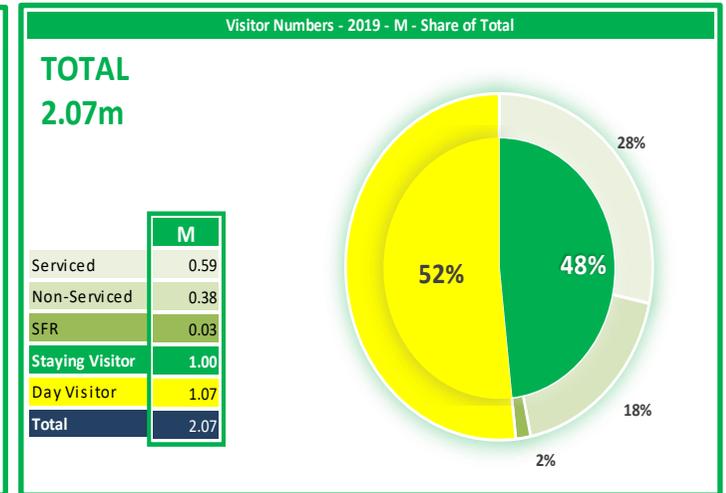
In 2019, there were an estimated 2,067,000 m tourism visits to the park; representing an increase of 7.5% on the previous year.

Overall, 52% of all visitors (1.07m) were Day Visitors; the remaining 48% (1.0m) stayed in the area for one or more nights (28% of those stayed in serviced accommodation; 18% in non-serviced). Visitor numbers have increased steadily since 2009 by 32%.

This is the first time since reporting that visitor numbers have broken the

two million mark within the Park.

Since 2009, Day Visitors have increased by 25%, (with a corresponding gain of 54% during December). Over the same period, total Staying Visitor numbers have increased by 42% (with a corresponding gain of 20% for those staying in serviced accommodation).



Key Figures: Visitor Numbers

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2019	M	0.587	0.378	0.032	0.998	1.069	2.067
2018	M	0.565	0.318	0.032	0.914	1.007	1.922
Change 18/19	%	4.0	19.1	0.3	9.1	6.1	7.5

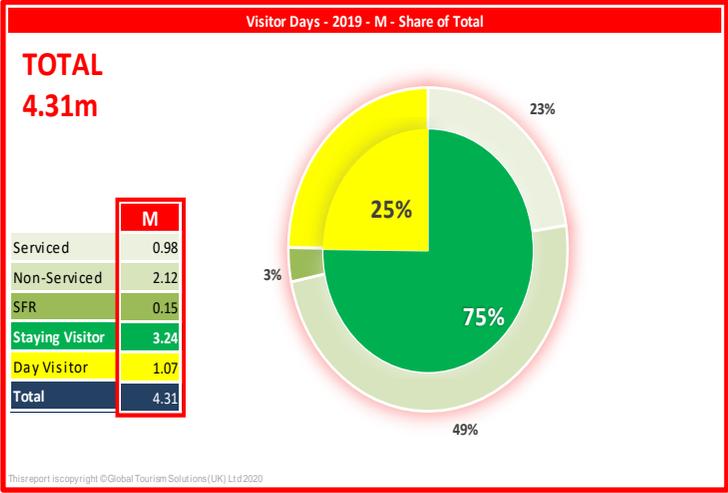
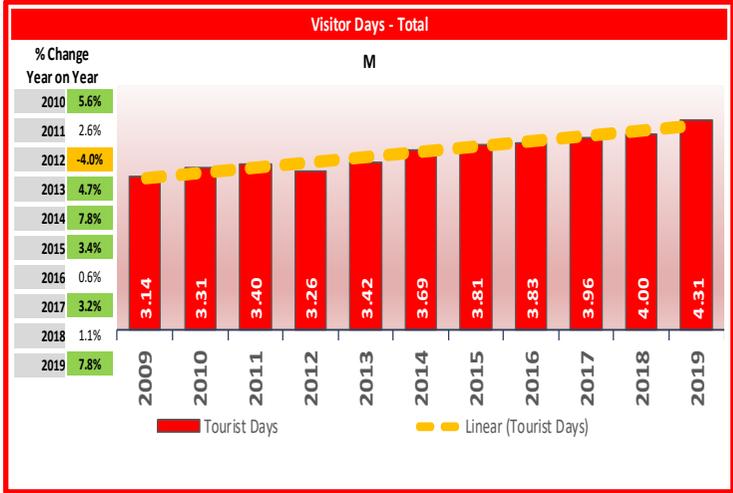
Total Visitor Days
4.31m

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 4,309,000 million days in the area as part of a tourism day trip, holiday or short break in 2019; an increase of 7.8% on the previous year and a 37% increase since 2009.**

Staying visitors still account for

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 (49%). The average length of stay by all staying visitors to the park remains 3.3 days; while non-serviced accommodation stands at 5.6 days indicating a high rate of weekly rentals within the area.



Key Figures: Visitor Days

Visitor Days		Served	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2019	M	0.975	2.119	0.147	3.240	1.069	4.309
2018	M	0.978	1.867	0.146	2.991	1.007	3.999
Change 18/19	%	-0.3	13.5	0.3	8.3	6.1	7.8

Average length of stay in days for different visitor types in 2019

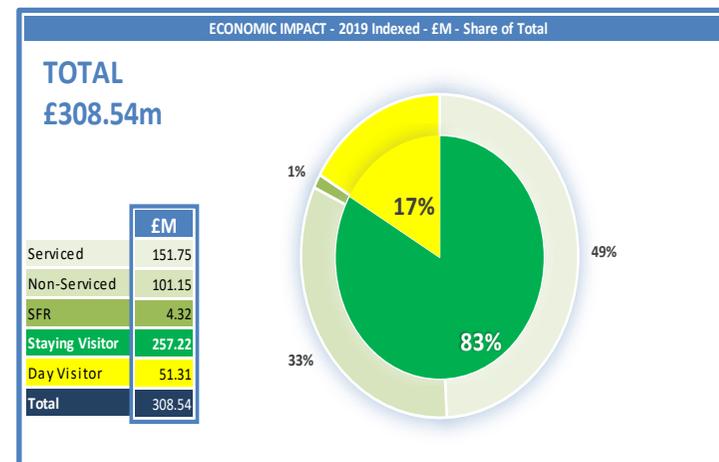
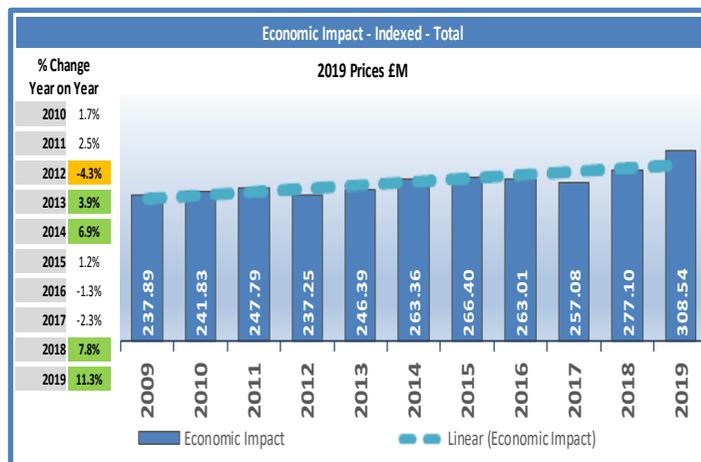
Day Visitors 1	All Visitors 2.1	Serviced Accommodation 1.7	Non-Serviced Accommodation 5.6	Staying with Friends/Relatives 4.6	All Staying Visitors 3.3
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**Total
Economic
Impact
£308.5m**

Economic Impact

For the first time, tourism visits to the Cairngorms National Park area generated a total economic impact of over £300 million (£308.54 m), an increase of 14.2% on the previous year and an overall steady increase of 30% since 2009 (all monetary figures in this narrative report are indexed, unless stated, to allow for direct comparison). The total economic impact in 2019 comprises the expenditure of visitors on goods and services, totalling £249.28m, and the *indirect* and *induced* economic effects of local businesses and residents spending tourism revenues locally, accounting for a further £59.25m. The serviced accommodation

sector again generated the highest (49%) economic impact, equating to £156 per person per day, followed by the non-serviced accommodation and Day Visitor sectors, both at £48. The economic impact of the Staying Visitor sector has increased by 31% since 2009, driven largely by the non-serviced component; Day Visitors' economic impact has risen by 25% over the same period.



Key Figures: Economic Impact (Un-indexed)

Economic Impact		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2019	£m	151.75	101.15	4.320	257.22	51.31	308.54
2018	£m	144.28	74.53	4.202	223.01	47.24	270.25
Change 18/19	%	5.2	35.7	2.8	15.3	8.6	14.2

Average economic impact generated per person by each type of visitor in 2019



**Total
FTEs
Supported
in 2019
5,942**

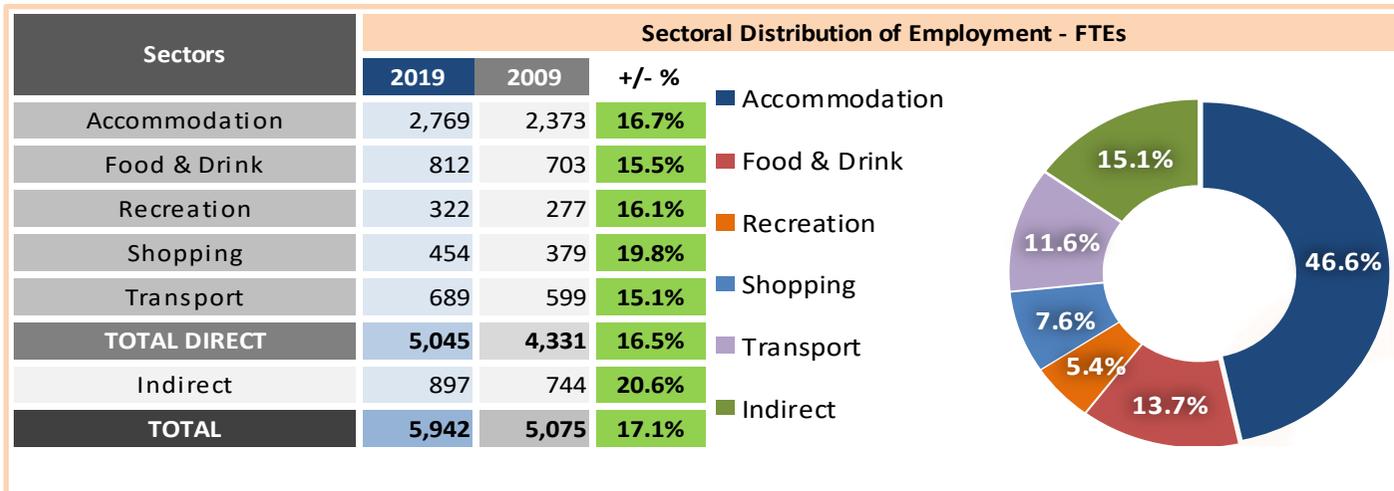
Definitions:

- **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 2019 supported a total of 5,942 Full-Time Equivalent jobs (FTEs); this represents not only an increase of 5.8% within the tourism sector over the past year, but also a steady rise of 17.1% since 2009. Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 5,045 FTEs, and the indirect and induced employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 897 FTEs. As with previous years, the largest sector for direct employment by far was related to Accommodation (2,769 FTEs) which has risen by 16.7% since 2009; followed by Food & Drink (812 FTEs); and then Transport (689 FTEs).

Employment Supported by Tourism 2009-2019: Full-Time Equivalents (FTEs) by Type




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