

# Scottish National Parks Sector Review-2012



Insight Department  
VisitScotland  
2013

## Welcome

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The following paper is a summary of the tourism performance at Scotland's National Parks between 2011 and 2012. Using data from the national monitors, The Great Britain Tourism Survey (GBTS), and International Passenger Survey (IPS), insight has been drawn to gain an accurate picture of Loch Lomond & Trossachs and Cairngorm National Parks volume, value and visitor profile.

## Key Insights

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- Overall domestic trips to Scotland's national parks grew by 25% in 2012, in comparison to the same period in 2011.
- 2012 generated over 1 million trips to the sector, with Cairngorms National Park accounting for 57% of the total visits to the sector.
- A total of £243million was spent within Scotland's national parks in 2012 by domestic visitors, a 25% increase on 2011. The average spend per trip to Scotland's national parks in 2012 was £226, a 1% increase from 2011's figure of £224. Spend per day increased by 17% to £70 on 2011's figure.
- The majority of domestic visitors to Loch Lomond and Trossachs National Park will stay for between 1-3 nights, and the spend an average of £255 per visit, and £83 per night.
- The most popular International visitors to the Loch Lomond and Trossachs National Park are from Germany, France and Spain. International visitors spent an average of £268 per trip and £64 a day between 2009 and 2011.
- 2012 saw a significant growth in solo travellers to the Loch Lomond and Trossachs National Park, with a 163% increase. Statistics suggest that Loch Lomond National Park is a more favourable destination for older couples and solo travellers with both groups accounting for 76% of the total visitors to the area.
- Walking and sightseeing are identified as the most popular activities for visitors to undertake during their trip to Loch Lomond & Trossachs National Park in 2012.
- 59% of the 571,000 trips made to the Cairngorms National Park in 2012 were made during a 1-3 nights stay in the area. The average spend per trip to the Cairngorms National Park was £202 in 2012, and spend per night was £59.
- The most popular International visitors to the Cairngorms National Park are from USA, Norway and Germany. International visitors spent an average of £439 per trip and £76 a day between 2009 and 2011.
- Statistics suggest that the Cairngorms is more geared towards younger consumers and larger parties, with more active pursuits in the top twenty activities for the area.

## Loch Lomond and Trossachs National Park

The Loch Lomond National Park generated 482,000 trips during 2012, a 16% increase on 2011's total figures. A slight decrease was also generated in overall nights with 1.5million coming to the park in 2012, a 1% decrease on 2011. Expenditure in the national park saw a healthy increase of 52% in 2012 in comparison to 2011, generating a total of £123million. The average spend per trip increased by 30% on 2011, generating £255 per visit. There was also an increase of 35% on 2011 in the average spend per night, with visitors now spending £83 per night in the national park.

### Trip Duration

57% of the 482,000 trips made to the Loch Lomond National Park in 2012 were made during a 1-3 nights stay in the area, a 20% increase on visits during 2011. Expenditure during this period also increased by 41% on 2011's figure, generating £51m during 1-3 night visits in 2012. 37% of the total visitors to the national park during 2012 spent 4-7 nights in the area, generating 14,000 more trips than in 2011. Expenditure was also higher than in 2011, with a 4% increase to £46million. 8+ night trips decreased by 5000 on 2011's figure to 28,000, but produced a healthy increase of £15m in expenditure on 2011's figure to achieve £25m in 2012.

### Party Composition

Loch Lomond	Trips (000's)			Expenditure (£m)		
	2011	2012	% of change	2011	2012	% of change
<b>Party Composition</b>						
<b>Total</b>	416	482	16%	74	95	28%
<b>Self Only</b>	52	137	163%	5	26	380%
<b>Husband/Wife/Partner</b>	291	228	-22%	52	43	-17%
<b>Children under 15</b>	88	114	23%	8	14	75%
<b>Male 16+</b>	100	90	-10%	27	23	-15%
<b>Female 16+</b>	81	92	14%	26	23	-12%

\*\*\* Please note that some figures may be based on a small sample size.

Loch Lomond saw an increase in the solo traveller for trips in 2012, a large 163% increase on 2011 with 137,000 visits, whilst couples decreased on 2011's figure by 22%. However, 23% more children under 15 travelled to the park in 2012, which may indicate an increase in school trip travel or more families with small children visiting the area, as opposed to the 'DINKY' or 'DINKER' culture (Dual income No Kids Yet, Dual Income No Kids Early Retirement).

The highest spenders in the national park were Husband/Wife/Partner groupings, which generated £43m to the area; however this is 17% down on last year's figure. The largest growth areas were seen in the self only and Children under 15 groups, which generated a growth of 380% and 75% respectively.

### Activities (Loch Lomond)

Walking and sightseeing are identified as the most popular activities for visitors to undertake during their trip to Loch Lomond National Park during 2012. 129,000 visitors (30%) made trips to sites of interest such as historical sites/buildings/houses/palaces during 2012. Special activities were also popular during 2012, with 32,000 visitors making trips to the national park for special shopping items.

#### Top ten activities

1. Long walk, hike or ramble (minimum of 2 miles\1 hour)	153,000
2. Sightseeing on foot	117,000
3. Sightseeing by car	102,000
4. Just relaxing	110,000
5. Short walk\ stroll - up to 2 miles\1 hour	94,000
6. Centre Based Walking	57,000
7. Visiting a castle\other historic site	50,000
8. Visiting a country park	43,000
9. Visiting a historic house, stately home, palace	36,000
10. Special shopping for items you do not regularly buy	32,000

### International Visitors

<b>Top Ten visiting nations to Loch Lomond National Park (000's)</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>Avg</b>
<b>Germany</b>	21	9	30	20
<b>France</b>	21	11	20	17
<b>Netherlands</b>	8	8	19	12
<b>Spain</b>	9	19	18	15
<b>USA</b>	18	14	13	15
<b>Canada</b>	6	6	9	7
<b>Switzerland</b>	1	6	7	4
<b>Australia</b>	11	9	4	8
<b>Italy</b>	12	2	4	6
<b>Ireland</b>	2	15	4	7

An average of 597,000 trips are made each year to the Loch Lomond and Trossachs National Park by International visitors between 2009 and 2011, spending an average of 2,4 million nights there and spending £160m. International visitors spent an average of £268 per trip to the national park, and £64 a day. In 2012, 147,000 international visitors made trips to the national park, a 21% increase on 2011's 121,000 figure.

The most popular visitors to the national park over the last three years have been from Germany, France and Spain with a collective total of 158,000 trips. The top 5 visiting nations to the national park between 2010 and 2012 are; Germany, France, Netherlands, Spain and USA

## Cairngorms National Park

The Cairngorms National Park saw trips to the area increase in 2012 by 32%, compared to 2011 with 593,000 trips in total. 16% more nights were also spent in the National Park during the same period, generating a total of 2m nights. Spend also rose during this period by 6% on 2011's figures, generating £120million. The average spend per trip to the Cairngorms National Park fell by 20% to £202 on 2011's £252 figure. Spend per night also decreased between this period to £59.

### Trip Duration

59% of the 593,000 trips made to the Cairngorms National Park in 2012 were made during a 1-3 nights stay in the area, a 52% increase in visitor numbers during this period on 2011. Visitors spent slightly more during their 1-3 night stay in 2012 than in 2011, with an 8% increase in overall expenditure to £28m. 33% of the total visitors to the national park during 2012 spent 4-7 night in the area. This was a 10% decrease on the total visitors during this period on 2011. Expenditure increased by 17% in comparison to 2011's performance of £53m. 8+ nights also increased in the Cairngorms during 2012 (5%) with 46,000 trips being made, 2000 more than in 2011. Expenditure decreased by 6% on 2011's figure with a total of £31m in 2012.

### Party Composition

Cairngorms	Trips (000's)			Expenditure (£m)		
	2011	2012	% of change	2011	2012	% of change
<b>Total</b>	447	593	<b>33%</b>	91	109	<b>20%</b>
<b>Self Only</b>	42	51	<b>21%</b>	5	12	<b>140%</b>
<b>Husband/Wife/Partner</b>	322	307	<b>-5%</b>	65	78	<b>20%</b>
<b>Children under 15</b>	209	268	<b>28%</b>	28	26	<b>-7%</b>
<b>Male 16+</b>	67	239	<b>256%</b>	21	27	<b>29%</b>
<b>Female 16+</b>	80	252	<b>215%</b>	22	37	<b>68%</b>

\*\*\* Please note that some figures may be based on a small sample size.

The Cairngorm National Park saw an overall increase of 33% in visits in 2012, in comparison to 2011. The largest increase came from male 16+ and female 16+ visitors, contributing a total of 491,000 visits during 2012. These groups also generated a high percentage of increase in expenditure, with Female 16+ and Male 16+ producing an increase of 68% and 29% respectively. The highest spending market in 2011, and 2012 was the Husband/Wife/Partner group, generating a total of £143million over two years.

### Activities (Cairngorms)

Sightseeing and walking were the most popular activities for visitors to the Cairngorms during 2012, followed by visiting attractions such as wildlife\nature reserves and scenic\historic railways. More visitors participated in active pursuits in the Cairngorms in 2012, than in Loch Lomond and the

Trossachs. Swimming, canal/boating, water sports, Mountain biking and horse riding were all popular activities in 2012.

### **Top ten activities**

1. Sightseeing on foot	255,000
2. Long walk, hike or ramble (minimum of 2 miles\1 hour)	230,000
3. Visiting a scenic\historic railway	162,000
4. Visiting a wildlife attraction\nature reserve	158,000
5. Swimming (indoors or outdoors)	151,000
6. Centre based walking (around a city\town centre)	143,000
7. Had a picnic or BBQ	141,000
8. Going on a guided tour - on foot, bus or other transport	131,000
9. Sightseeing by car	129,000
10. Visiting another type of attraction	129,000

### **International Visitors**

<b>Top ten visiting nations to Cairngorms National Park</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>Avg</b>
<b>USA</b>	25	34	52	37
<b>Norway</b>	33	43	35	37
<b>Germany</b>	28	32	30	30
<b>Netherlands</b>	20	26	28	25
<b>France</b>	21	21	25	22
<b>Denmark</b>	15	12	17	15
<b>Italy</b>	15	14	16	15
<b>Australia</b>	16	16	15	16
<b>Spain</b>	13	25	13	17
<b>Canada</b>	10	13	9	11

An average of 287,000 trips were made to the Cairngorms National park between 2009 and 2011, with visitors spending an average of 1.6million nights and spending £126m. International visitors spent an average of £439 per trip, and £76 per day to the national park. In 2012, there were 310,000 international visits to the Grampian area, which is a 5% decrease on 2011's 327,000 figure.

The most popular visitors to the national park over the last three years have been from USA, Norway and Germany with a collective total of 311,000 visits. The top 5 visiting nations to the national park between 2010 and 2012 are; USA, Norway, Germany, Netherlands, and France.

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## Appendices

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### **Sources**

Great Britain Tourism Survey  
International Passenger Survey

### **Disclaimer**

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**Date: 2013**