Loch Lomond & The Trossachs National Park

STEAM Tourism Economic Impacts
2017 Report
Narrative Summary

LOCH LOMOND & THE TROSSACHS NATIONAL PARK

Loch Lomond & The Trossachs National Park's Visitor Economy 2017

This is a summary of the tourism trends research undertaken for Loch Lomond & The Trossachs National Park by Global Tourism Solutions (UK) Ltd.

2.9m Tourism Visits to the national park area in 2017, up 5.4% on the previous year

783,000 visits were made by visitors **staying in the park** as part of a holiday or short break, generating **2.44 million nights** in accommodation across the area

4.6 million Visitor Days and Nights generated by **staying** and **day visitors** to the park in **2017**

£386 million was generated within the local economy through visitor and tourism business expenditure, **an increase of 13.5% on the previous year**

2.1m visits made by **Day Visitors** to the park area in 2017

Day Visits generated **£142 million** for the economy of the park in 2017

On average, visitors **staying** in the park stay **3.1 nights** in the region and spend **£78.5 million** on local accommodation

Visitors to **the park** are vital to local businesses, supporting more than **6,799 full time equivalent jobs, up 1.6% on 2016**

Staying visitors generate a **total economic impact** of **£244 million** for businesses in the park

Total Visitor Day and Nights increased by 9.2% between 2014 and 2017

Day Visitor numbers increased by 18.2% between 2014 and 2017

Total Visitor Numbers increased by 14% between 2014 and 2017

2014

2017

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
27% of Visits

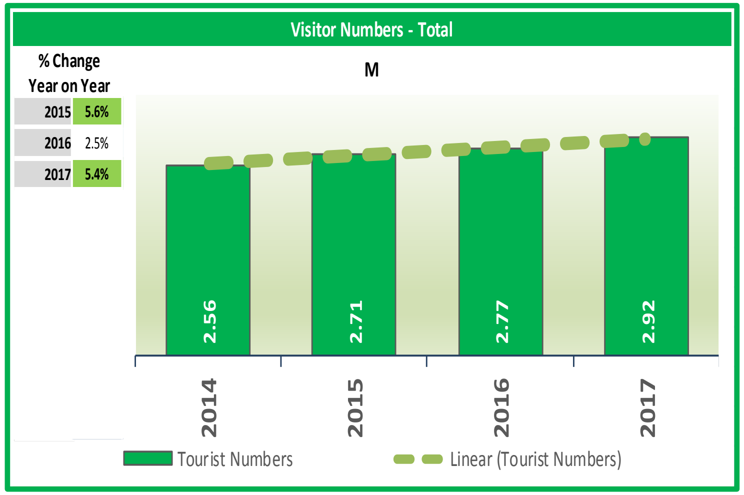
Day Visitors
73% of Visits

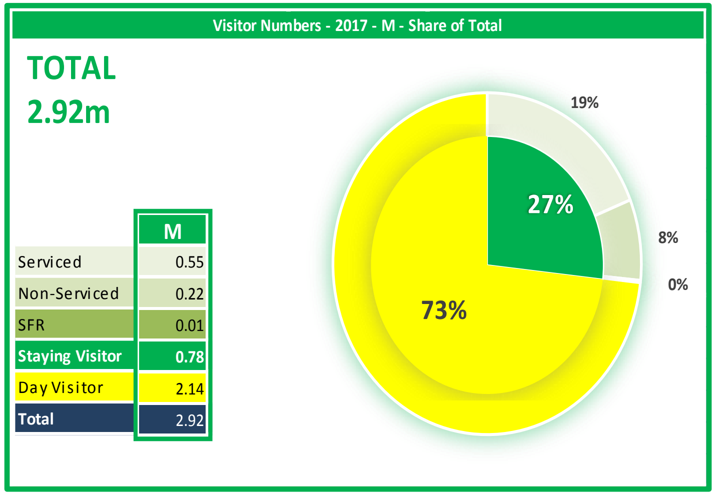
Total Visitor Numbers

2.92m

Visitor Numbers

In 2017, there were an estimated 2.92m tourism visits to the park; representing an increase of 5.4% on the previous year. Overall, 27% of all visitors (783,000) stayed in the area for one or more nights, the remaining 73% of visitors (2,141,000) were Day Visitors to the park. **Visitor numbers have increased steadily over the past four years by 14% (day visitors have increased by 18.2% over the same period of time).**





Within the staying visitors sector, those staying in serviced accommodation represent the majority of visitors at 19%. Staying visitor numbers were up on the previous year by 3.5%. **Day Visitor numbers increased by 6.1% over the same period and represent almost three-quarters of all visitors to the park, reflecting the park's closeness to Glasgow and its population of 600,000.**

Key Figures: Visitor Numbers

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2017	**M**	**0.553**	**0.224**	**0.006**	**0.783**	**2.141**	**2.924**
2016	M	0.536	0.214	0.006	0.756	2.018	2.774
Change 16/17	**%**	**3.1**	**4.6**	**1.7**	**3.5**	**6.1**	**5.4**

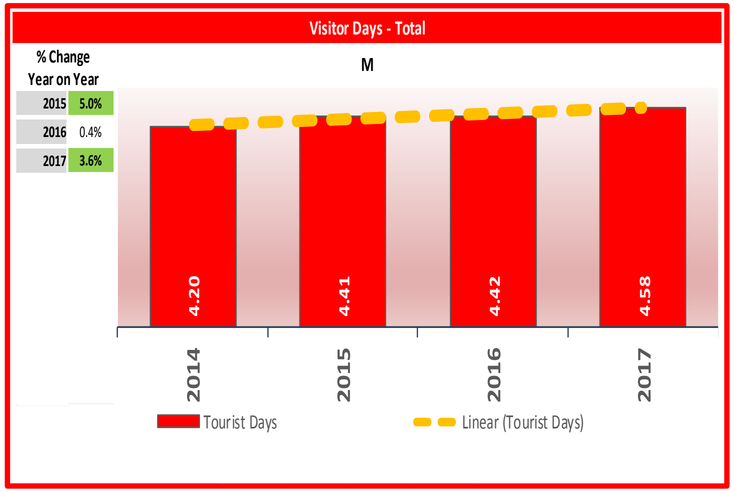
Total Visitor Days

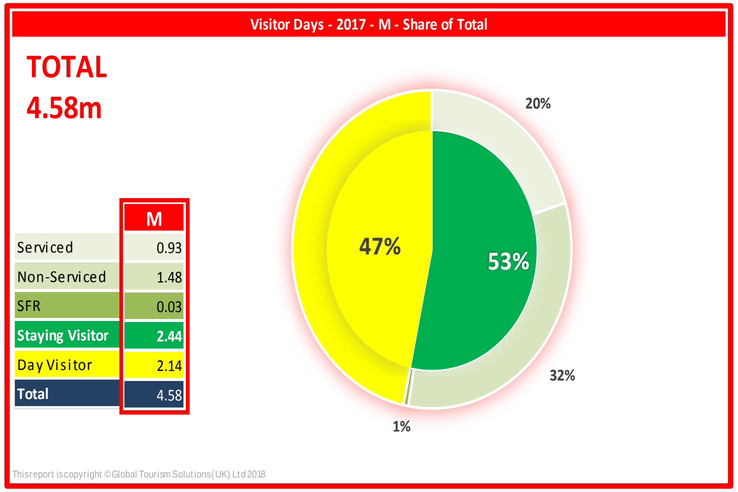
4.58m

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 area spent an estimated 4.58 million days in the area as part of a tourism day trip, holiday or short break in 2017; this represents an increase of 3.6% on the previous year and a 9.2% increase in visitor days since 2014**.

Staying visitors account for just over a half (53%) of all visitor days, with those staying in non-serviced representing almost a third (32%) of the total, which is high when compared to other areas. The average length of stay by all staying visitors to the park was 3.1 days; with non-serviced accommodation standing at 6.6 days, and serviced accommodation at 1.6.





Key Figures: Visitor Days

Visitor Days		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2017	**M**	**0.931**	**1.485**	**0.027**	**2.442**	**2.141**	**4.583**
2016	M	0.937	**1.442**	**0.026**	**2.405**	**2.018**	**4.423**
Change 16/17	**%**	**-0.6**	**3.0**	**1.3**	**1.6**	**6.1**	**3.6**

Average length of stay in days for different visitor types in 2017

Day Visitors	All Visitors	Serviced Accommodation	Non-Serviced Accommodation	Staying with Friends/Relatives	All Staying Visitors
1	1.6	1.7	6.6	4.5	3.1

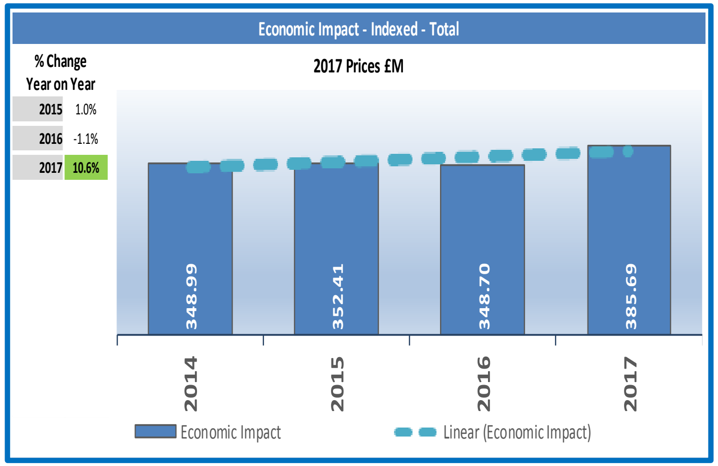
Total Economic Impact

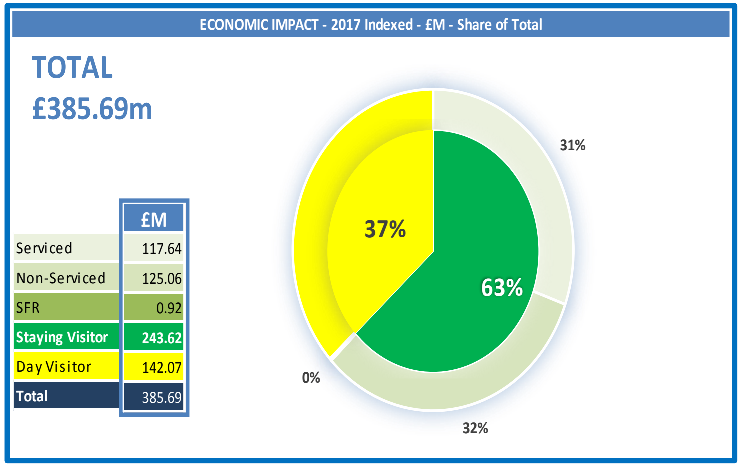
£386m

Economic Impact

Tourism visits to the Loch Lomond & The Trossachs National Park area in 2017 generated a total economic impact of £385.69 million, a healthy increase of 13.5% on the previous year and an overall increase of 10.5% over the past four years (all monetary figures in this narrative report are indexed, unless stated, to allow direct comparison with 2017 figures). The total economic impact comprises the expenditure of visitors on goods and services, totalling £274.61m, and the *indirect* and *induced* economic effects of local businesses and residents spending tourism revenues locally, accounting for a further £11.08m.

Day Visitor spend has increased substantially by 18.4% since 2014 including significant gains in the off-peak seasonal months of 19.9% in the first quarter, and 27.3% in the last quarter. Staying visitor spend has also increased, especially in the second quarter, with non-serviced accommodation increasing by 33.3% Apr to Jun over the past four years.





Key Figures: Economic Impact (Unindexed)

Economic Impact		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2017	**£m**	**117.64**	**125.06**	**0.924**	**243.62**	**142.07**	**385.69**
2016	£m	101.66	109.03	0.879	211.57	128.33	339.90
Change 16/17	**%**	**15.7**	**14.7**	**5.1**	**15.2**	**10.7**	**13.5**

Average economic impact generated per person by each type of visitor in 2017

Day Visitors
£66.36p er Day

Staying with Friends and Relatives
£34.22 per Day
£153.99 per Visit

All Visitors
£84.16 per Day
£134.65 per Visit

Non-Serviced Accommodation
£84.22 per Day
£555.82 per Visit

All Staying Visitors
£99.76 per Day
£309.26 per Visit

Serviced Accommodation
£126.36 per Day
£214.81 per Visit

Total FTEs Supported in 2017

6,799

Definitions:

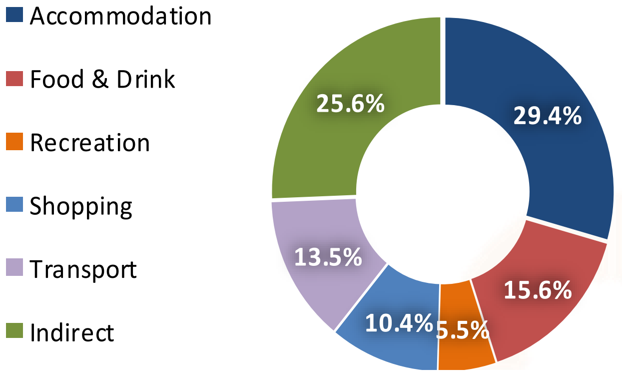
- **Accommodation:** Payments for overnight stays in accommodation, such as room rates for serviced accommodation, or pitch fees and hire charges for non-serviced accommodation.
- **Recreation:** Covering expenditure on a wide range of leisure activities such as museum, event, concert / theatre and attractions 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 Loch Lomond & The Trossachs National Park in 2017 supported a total of 6,799 Full-Time Equivalent jobs (FTEs); this represents an increase of 1.6% within the tourism sector over the past year, and a rise of 4.3% since 2014. Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 5,056 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 1,743 FTEs. **The largest sectors for direct employment by far was related to Accommodation (1,999 FTEs); followed by Food & Drink (1,058 FTEs); Transport (919 FTEs) and then Shopping (708).**

Employment Supported by Tourism 2014-2017: Full-Time Equivalents (FTEs) by Type

Sectors	Sectoral Distribution of Employment - FTEs		
	2017	2014	+/- %
Accommodation	1,999	2,156	-7.3%
Food & Drink	1,058	977	8.3%
Recreation	372	348	7.0%
Shopping	708	620	14.1%
Transport	919	847	8.5%
TOTAL DIRECT	5,056	4,948	2.2%
Indirect	1,743	1,570	11.0%
TOTAL	6,799	6,518	4.3%



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