

VisitAberdeenshire
Presents.....
The latest regional insights

What is “STEAM”?

Scottish Tourism Economic
Activity Model

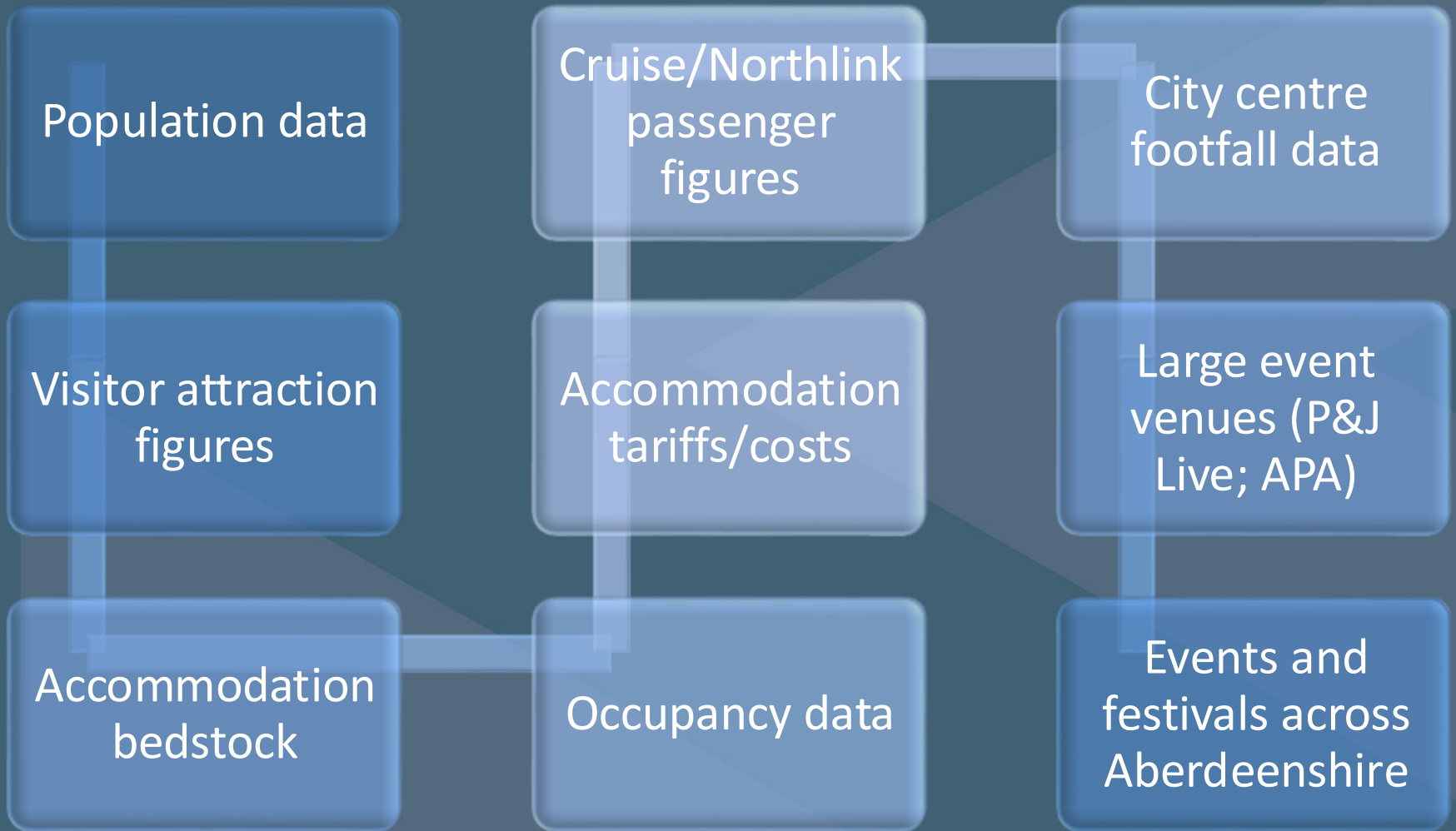
Quantitative: volume and
value data

Measures tourism from
bottom up

Blend of data provided by
GTS and by client (local
picture and data sources)

Directly informs several
Destination Strategy KPIs

2024 source examples



The 2024 Headlines

The value of tourism to the region's economy has risen to £1.27bn

The industry was directly responsible for sustaining over 11,400 jobs

The region attracted over 3.6 million staying visitors

Over 2.5 million day visitors spent time in the region

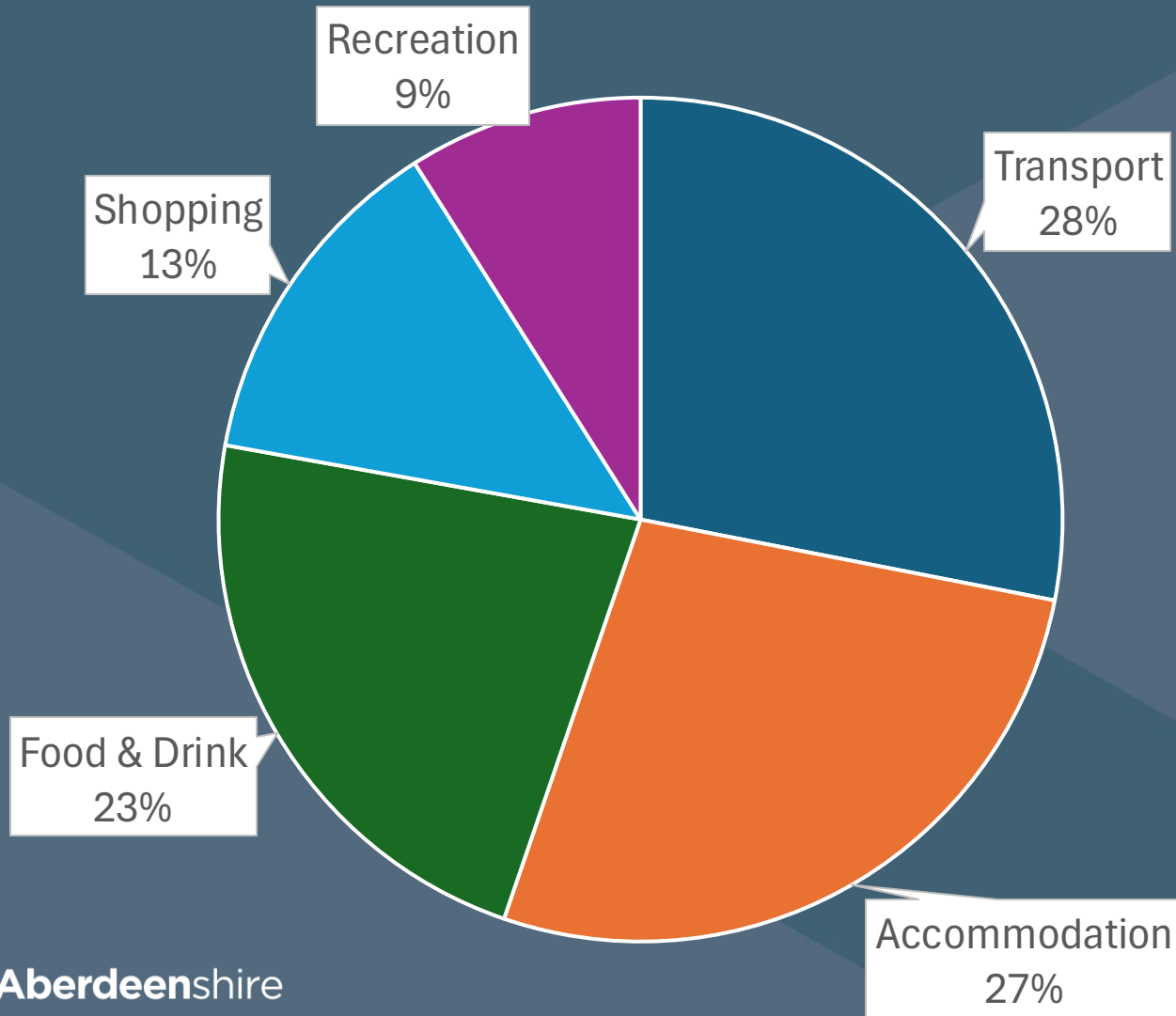
£232m was spent on accommodation

£193m was spent on food and drink in the region

STEAM 2024: up/down on previous year?

	2024	% change on 2023
Staying visitors	3.68m	+16.9%
Day visitors	2.59m	+2.8%
Direct Expenditure	£853.8m	+2.0%
Economic Impact	£1.27bn	+2.0%
Direct Full Time Equivalents (FTEs)	11,413	+1.5%
Total Employment (FTEs)	16,000	+1.6%

Breakdown of direct expenditure

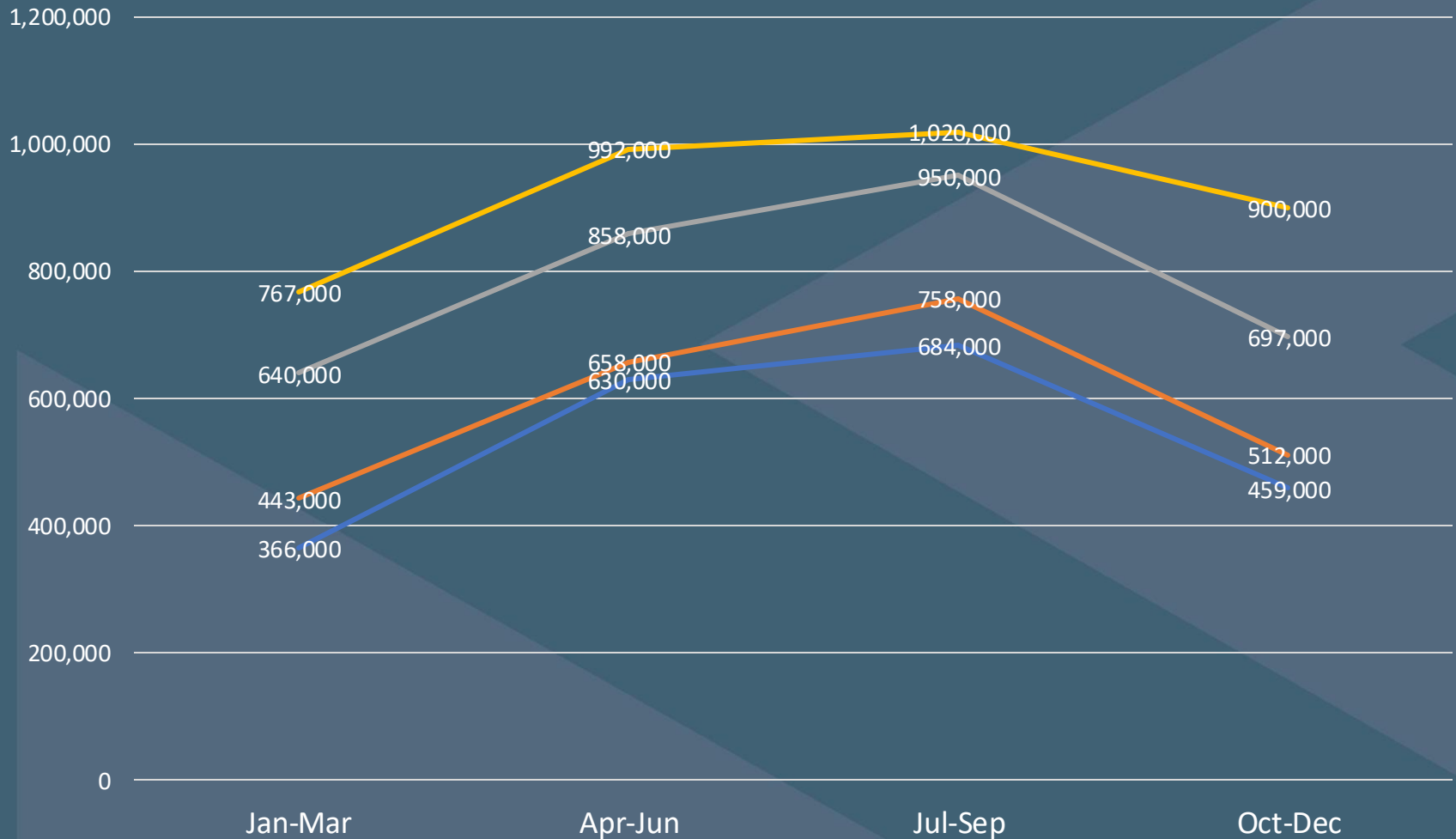


City and Shire: 2024 against 2023

	CITY	% share	SHIRE	% share
Staying visitors	2.225m (+19.9%)	61%	1.452m (+12.7%)	39%
Day visitors	1.504m (+0.9%)	58%	1.082m (+5.4%)	42%
Direct Expenditure	£502.18m (+2.2%)	59%	£351.63m (+1.6%)	41%
Economic Impact	£751.43m (+2.2%)	59%	£518.59m (+1.6%)	41%
Direct FTEs	5,718 (+1.0%)	50%	5,695 (+2.0%)	50%
Total Employment (FTEs)	8,465 (+1.4%)	53%	7,535 (+1.9%)	47%

Staying visitors

Quarterly spread of tourism in Aberdeen and Aberdeenshire



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— 2019 — 2022 — 2023 — 2024

Staying visitors

Monthly spread of tourism in Aberdeen and Aberdeenshire

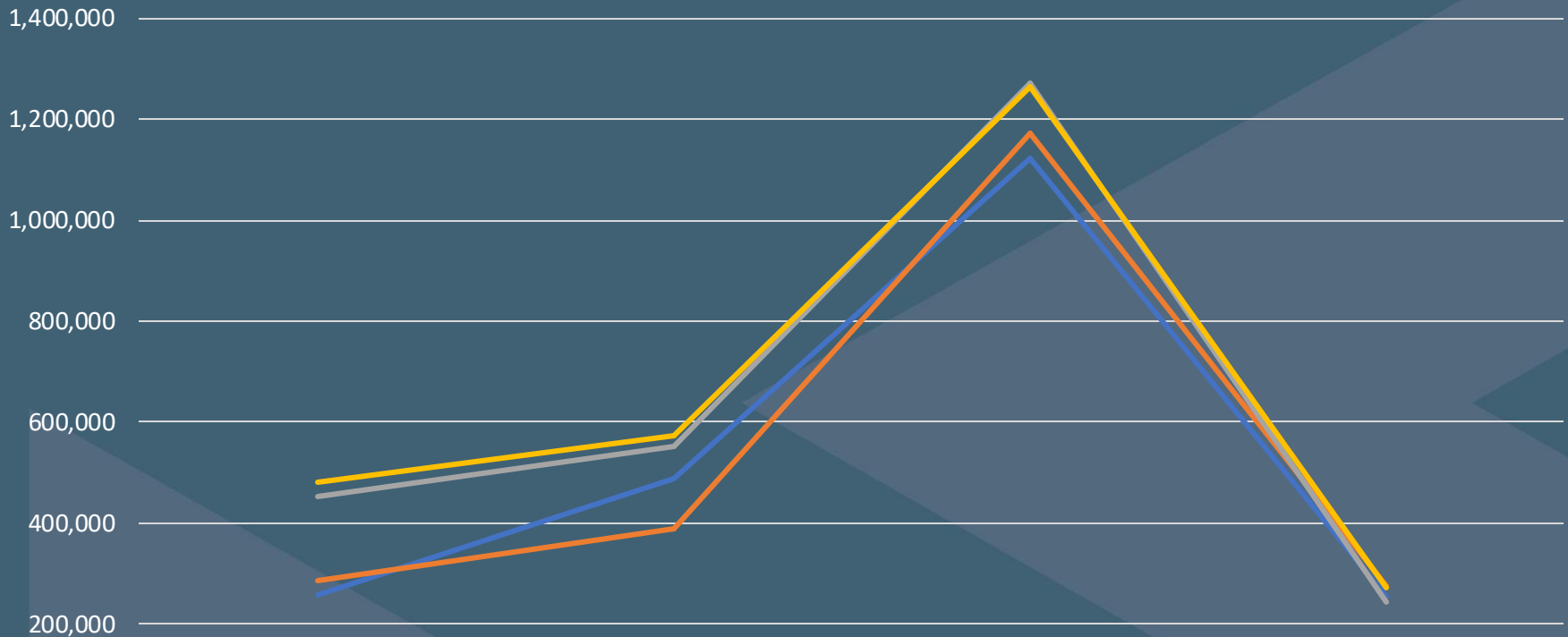


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	94,000	123,000	149,000	195,000	218,000	217,000	206,000	262,000	215,000	173,000	137,000	148,000
2022	107,000	166,000	170,000	244,000	199,000	214,000	243,000	263,000	252,000	201,000	161,000	151,000
2023	186,000	225,000	229,000	316,000	299,000	243,000	292,000	358,000	300,000	257,000	205,000	235,000
2024	189,000	268,000	309,000	277,000	366,000	349,000	338,000	399,000	282,000	329,000	264,000	307,000

— 2019 — 2022 — 2023 — 2024

Day visitors

Quarterly spread of tourism in Aberdeen and Aberdeenshire

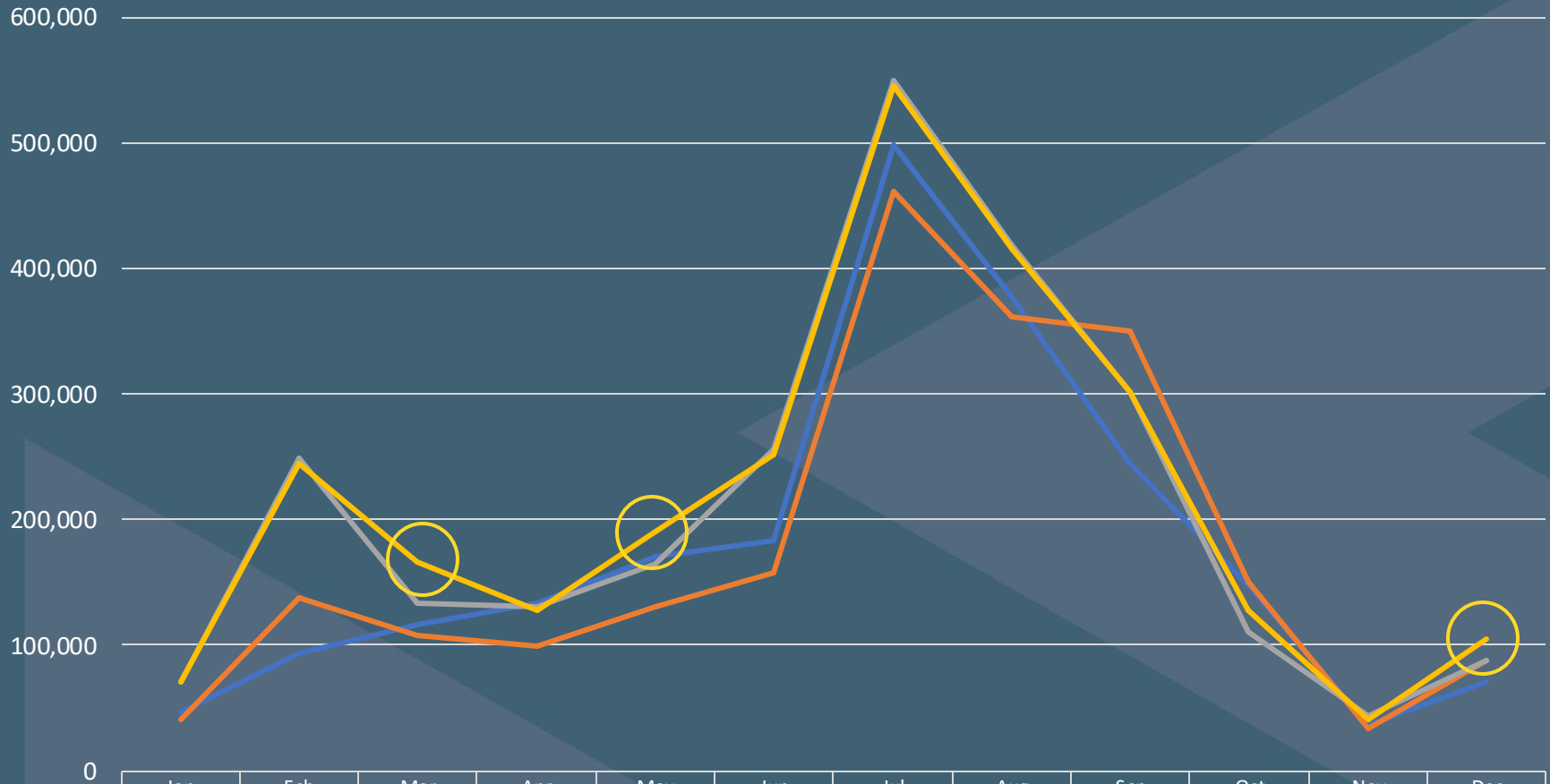


	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec
2019	257,000	487,000	1,121,000	254,000
2022	286,000	389,000	1,173,000	273,000
2023	452,000	551,000	1,271,000	242,000
2024	480,000	571,000	1,263,000	272,000

— 2019 — 2022 — 2023 — 2024

Day visitors

Monthly spread of tourism in Aberdeen and Aberdeenshire



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	47,000	93,000	116,000	133,000	171,000	183,000	498,000	377,000	245,000	148,000	36,000	71,000
2022	40,000	138,000	108,000	99,000	131,000	158,000	461,000	362,000	350,000	151,000	34,000	88,000
2023	70,000	249,000	133,000	131,000	165,000	256,000	550,000	418,000	302,000	111,000	43,000	88,000
2024	70,000	244,000	166,000	128,000	191,000	251,000	546,000	415,000	302,000	127,000	40,000	105,000

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