

# Volume and Value of Tourism in the North-east 2024: *Focus on Aberdeenshire* (exc. City)

# What is “STEAM”?

Scottish Tourism Economic  
Activity Model

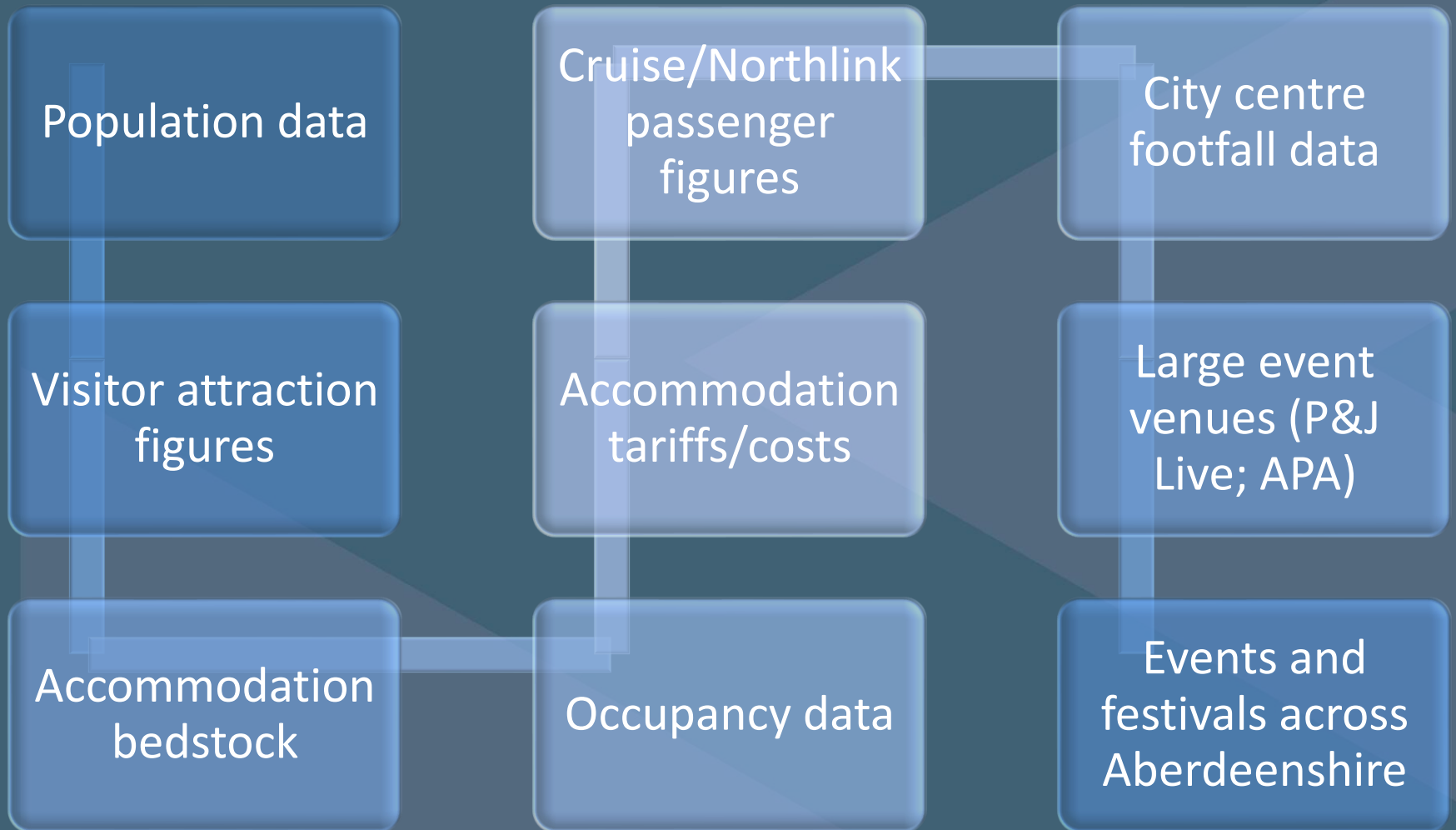
Quantitative: volume and  
value data

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



# Recap on regional headlines: *Aberdeen and Aberdeenshire*



# The 2024 regional 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%

# City and Shire: 2024 against 2023

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

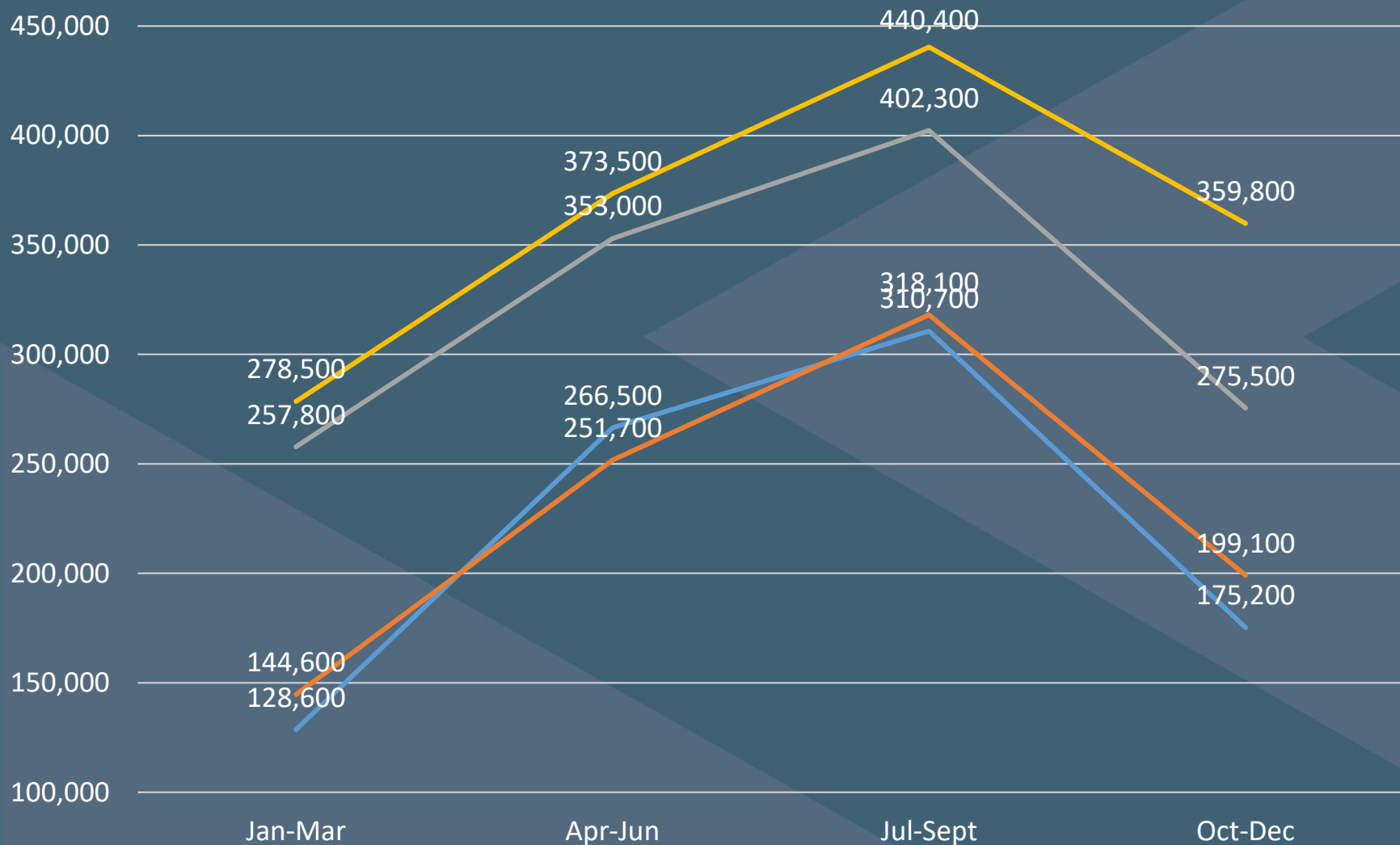
# *Aberdeenshire visitor flow*



# Staying visitors

## Quarterly spread of tourism in Aberdeenshire

### 2019, 2022-2024



Visit**Aberdeenshire**

— 2019

— 2022

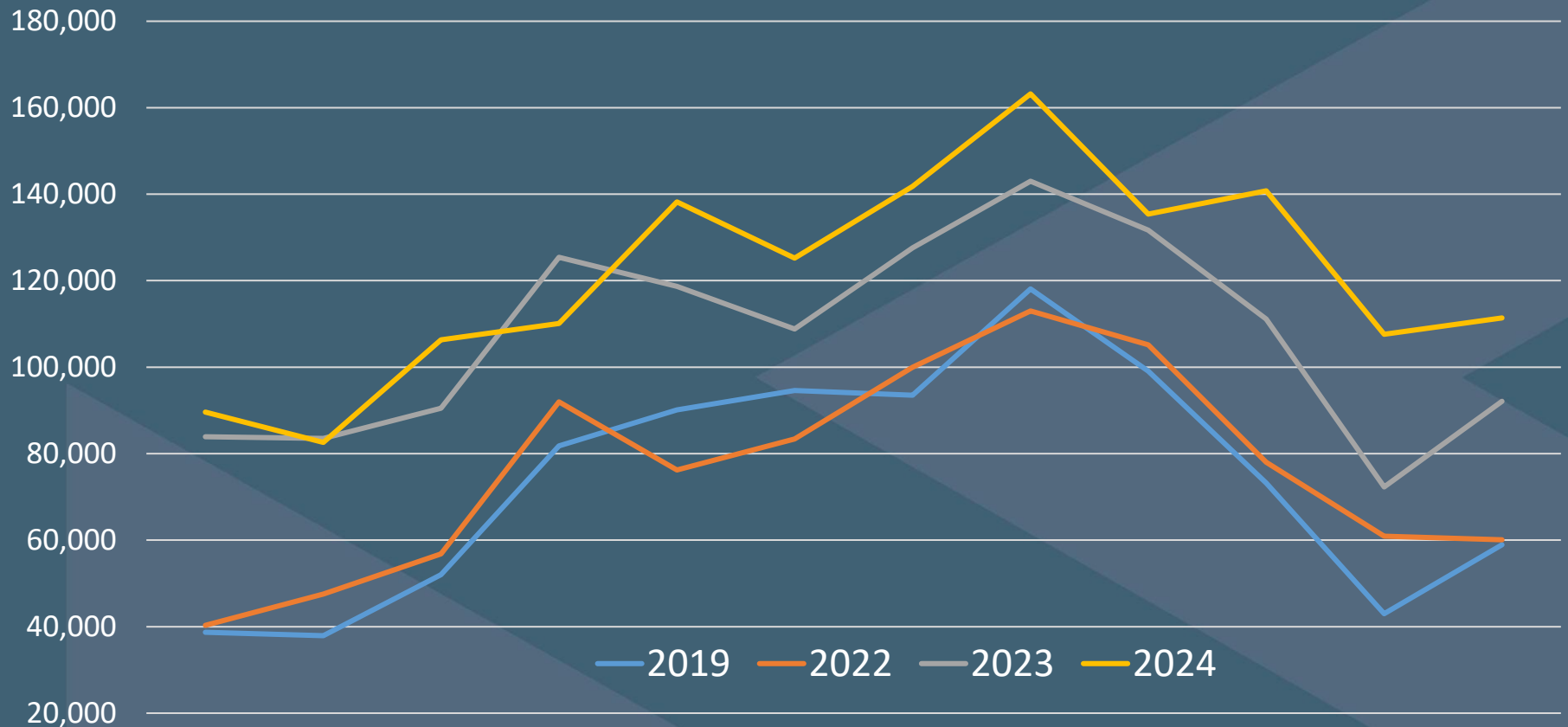
— 2023

— 2024

# Staying visitors

## Monthly spread of tourism in Aberdeenshire

### 2019, 2022-2024

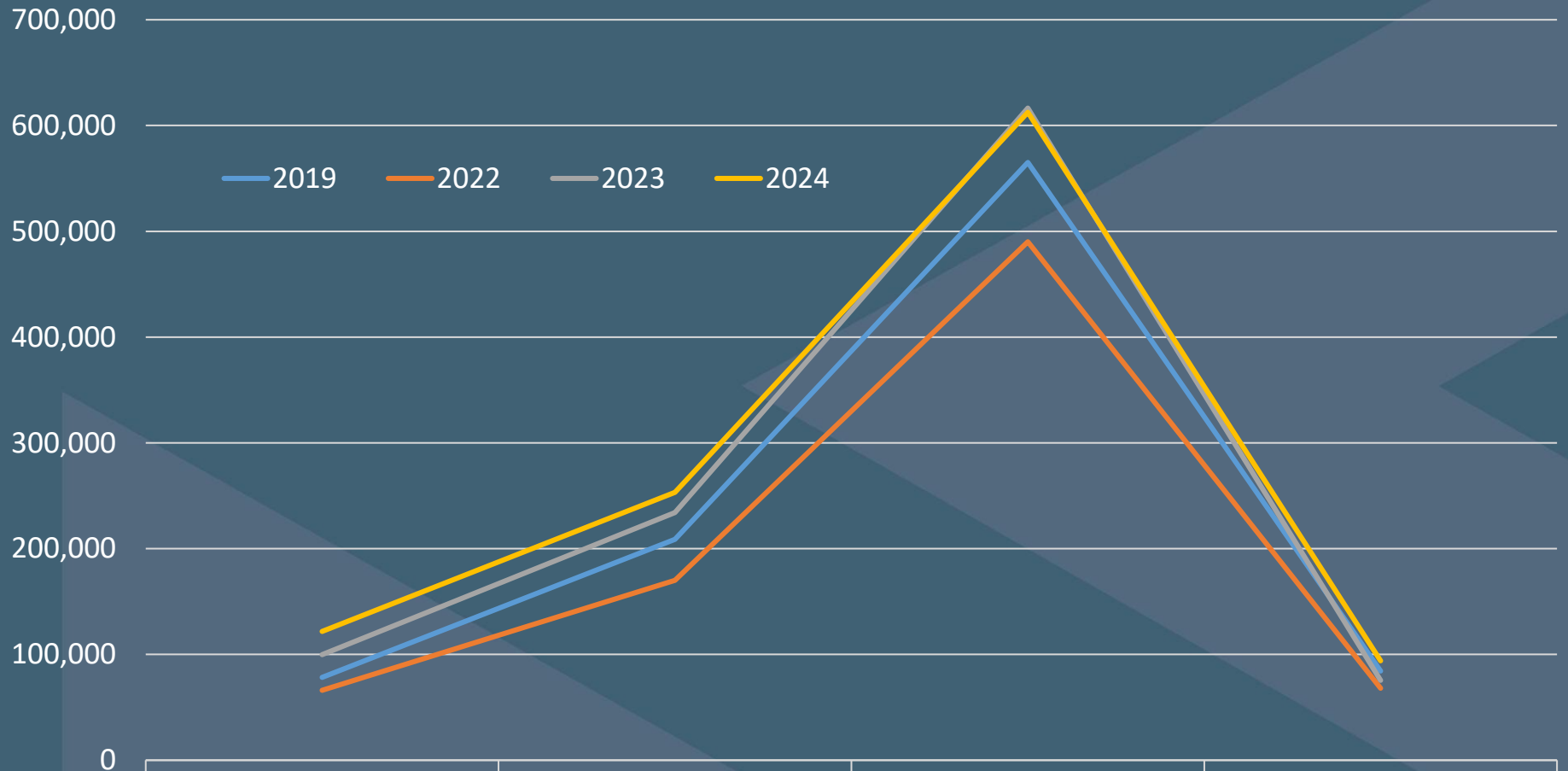


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	38,700	37,900	52,000	81,800	90,100	94,600	93,500	118,100	99,100	73,200	43,000	58,900
2022	40,300	47,500	56,800	92,000	76,200	83,400	100,000	113,000	105,200	78,000	60,900	60,100
2023	83,900	83,500	90,500	125,400	118,700	108,800	127,600	143,000	131,700	111,100	72,300	92,100
2024	89,600	82,600	106,300	110,100	138,200	125,200	141,800	163,200	135,400	140,800	107,600	111,400

# Day visitors

## Quarterly spread of tourism in Aberdeenshire

### 2019, 2022-2024



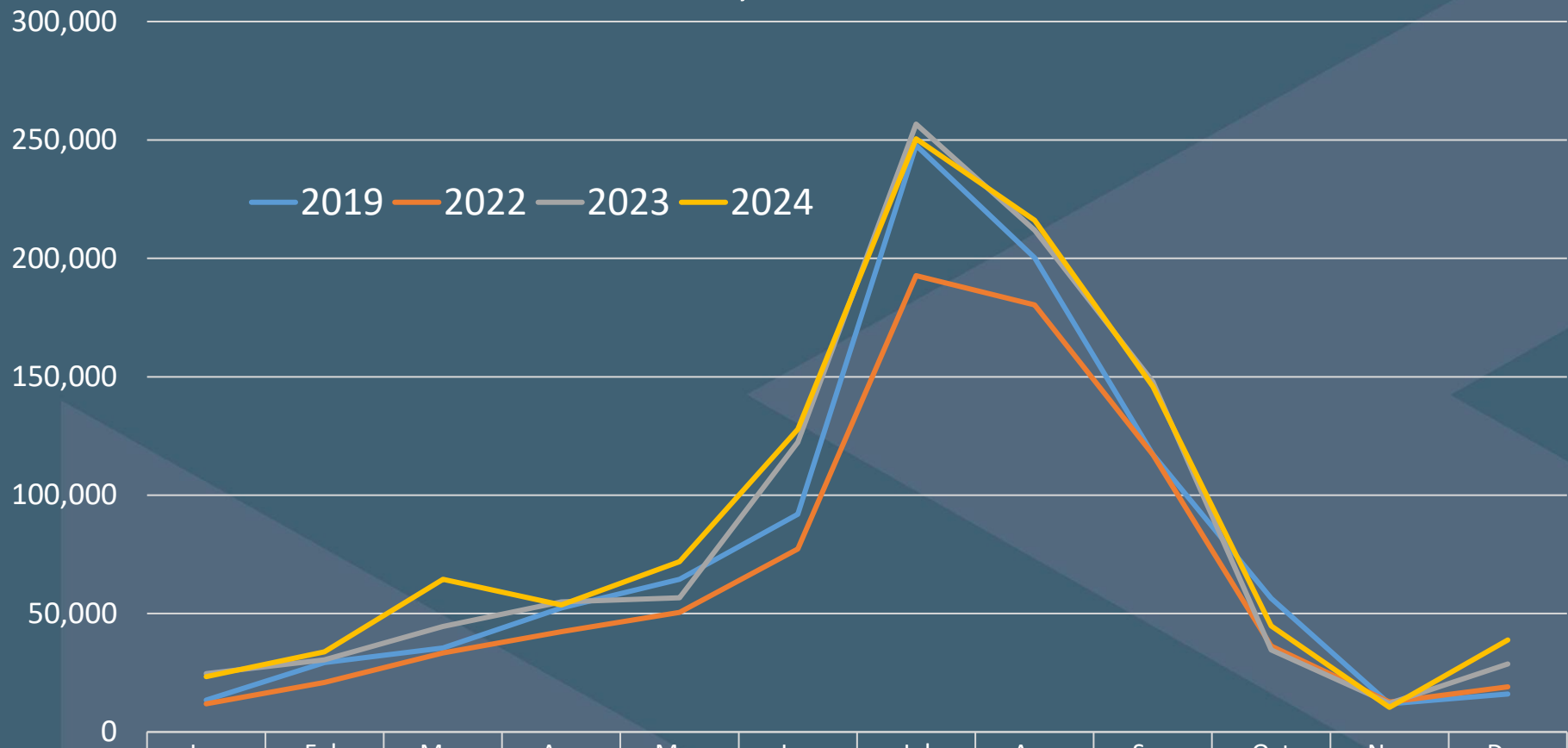
	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec
2019	78,300	208,900	565,100	84,300
2022	66,100	170,100	490,100	68,000
2023	99,800	234,000	616,500	75,500
2024	121,800	253,300	612,500	94,000



# Day visitors

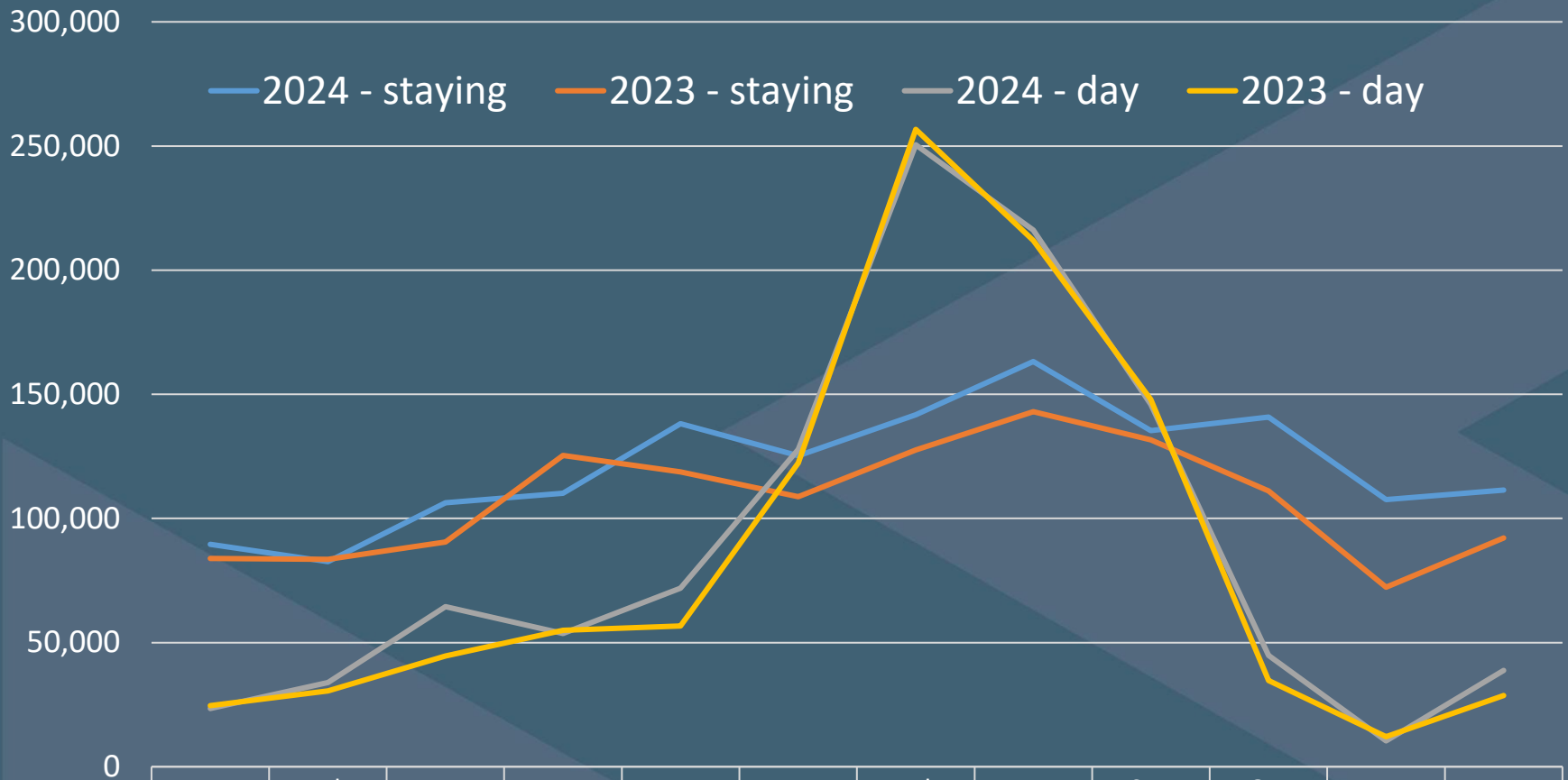
## Monthly spread of tourism in Aberdeenshire

### 2019, 2022-2024



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	13,500	29,300	35,500	52,400	64,500	92,000	247,700	200,200	117,200	56,400	11,900	16,000
2022	11,900	20,900	33,400	42,300	50,500	77,300	192,700	180,300	117,100	36,300	12,600	19,100
2023	24,600	30,500	44,600	54,900	56,700	122,400	256,700	211,900	147,900	34,700	12,100	28,700
2024	23,400	33,900	64,500	53,700	71,900	127,800	250,500	216,100	145,900	44,800	10,400	38,800

# Day and staying visitors combined: Aberdeenshire 2023-2024



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