



STEAM FINAL TREND REPORT FOR 2009-2019

Final

Visit Moray Speyside

Global Tourism Solutions (UK) Ltd

2 Union Place

Anstruther

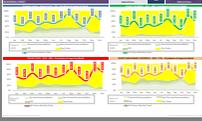
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Report Section Design and Features

Headers

At the top of each page is a band containing key information about your report



User Controls (Excel File)

Above the **Headers** is a band containing **User Controls**, these allow you to adjust various features of your report to suit your needs. When using these controls the report recalculates and represents your STEAM report outputs automatically. You may notice some delay between changing a setting and seeing the result, or being able to adjust a further setting, this is entirely normal.

Drop down fields allow you to change the **Years** shown in the tables and charts and in some sections of the report allow you to focus on specific **Visitor Types**. Where there is a financial component to the section you are viewing, you will be able to **Index** the historic financial data, by applying an inflationary factor based on the most recent report year shown in that report section. Where there is a **trend** or comparative element to the section and percentage changes are shown, you have the option to apply **highlighting** to those values that are above a certain percentage threshold (+/-3% for example). In the Comparative Headlines section, the **Focus Year** can be any year from the trend period, the **Comparison Year** can only be set as a year which is earlier than the focus year.



Units

Each section of the report automatically adjusts number formatting to present data in the most easily understandable way. Different visitor types can generate impacts at very different scales and as a result you may see figures for one group of visitors in thousands and another in millions. The units we use are:

- FTEs** = Full Time Equivalent jobs supported
- £000s / 000s** = thousands of pounds or thousands of tourist days / tourist numbers
- £m / m** = millions of pounds or millions of tourist days / tourist numbers
- £bn / bn** = billions of pounds or billions of tourist days / tourist numbers

Visitor Numbers / Visitor Days / Average Length of Stay

The term **Visitor Numbers** relates to the estimated number of individual **visits** to the area. Each type of visitor tends to stay, on average, a different length of time (Average Length of Stay). The term **Visitor Days** relates to the estimated number of **days** spent within the area by the different visitor types. If you divide the visitor days by visitor numbers, you have the **Average Length of Stay** for that Visitor Type

STEAM FINAL TREND REPORT FOR 2009-2019
VISIT MORAY SPEYSIDE

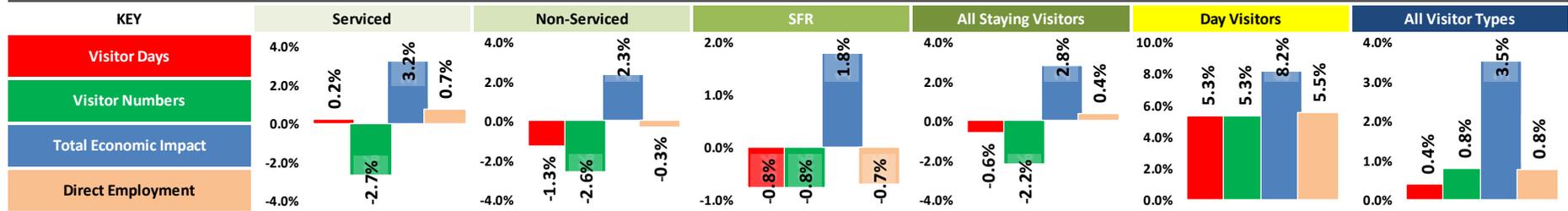
Comparing 2019 and 2018
All £'s Historic Prices

COMPARATIVE HEADLINES

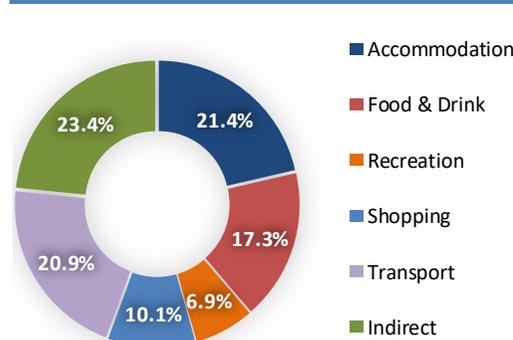
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2019 & 2018 - IN HISTORIC PRICES

KEY	KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2019 & 2018 - IN HISTORIC PRICES																	
	Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced														
	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %
Visitor Days 000s	505.09	503.93	0.2%	504.27	510.83	-1.3%	544.70	548.86	-0.8%	1,554.06	1,563.62	-0.6%	332.88	316.07	5.3%	1,886.94	1,879.70	0.4%
Visitor Numbers 000s	281.67	289.45	-2.7%	69.18	71.00	-2.6%	120.44	121.36	-0.8%	471.28	481.81	-2.2%	332.88	316.07	5.3%	804.16	797.88	0.8%
Direct Expenditure £M																102.77	99.29	3.5%
Economic Impact £M	72.09	69.82	3.2%	26.99	26.37	2.3%	16.89	16.59	1.8%	115.97	112.79	2.8%	18.21	16.84	8.2%	134.18	129.63	3.5%
Direct Employment FTEs	1,490	1,479	0.7%	547	548	-0.3%	192	194	-0.7%	2,229	2,221	0.4%	207	196	5.5%	2,436	2,417	0.8%
Total Employment FTEs																2,911	2,888	0.8%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2019 & 2018 - IN HISTORIC PRICES

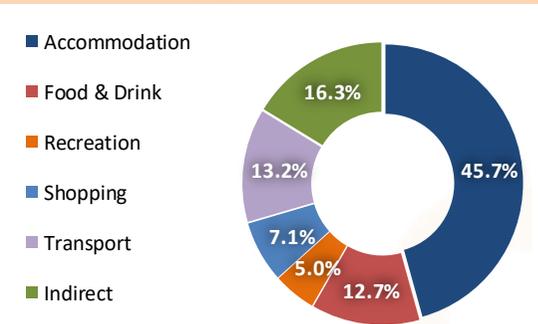


Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices



Sectors	2019	2018	+/- %
Accommodation	28.72	27.62	4.0%
Food & Drink	23.20	22.42	3.5%
Recreation	9.218	8.865	4.0%
Shopping	13.55	13.09	3.5%
Transport	28.08	27.28	2.9%
TOTAL DIRECT	102.77	99.29	3.5%
Indirect	31.41	30.34	3.5%
TOTAL	134.18	129.63	3.5%

Sectoral Distribution of Employment - FTEs



Unindexed Key Measures by Year and Visitor Type for the Period 2009 to 2019

Visitor Types: *Total*
Serviced Accommodation
Non-Serviced Accommodation
SFR
Staying Visitor
Day Visitor

STEAM FINAL TREND REPORT FOR 2009-2019

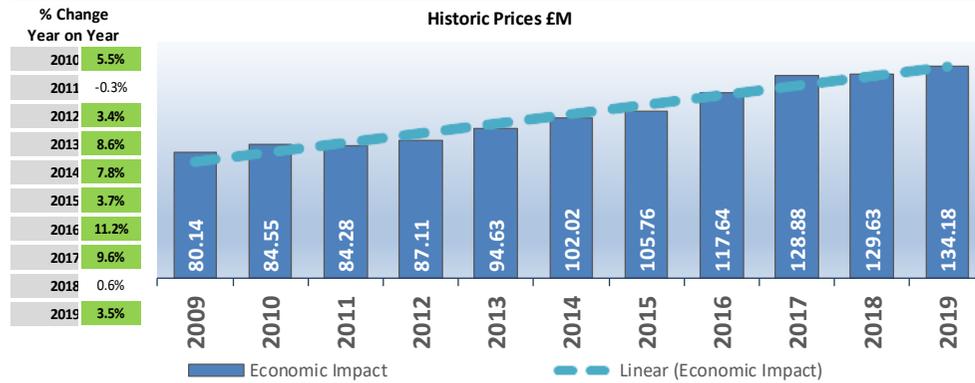
VISIT MORAY SPEYSIDE

2009 to 2019
Historic Prices

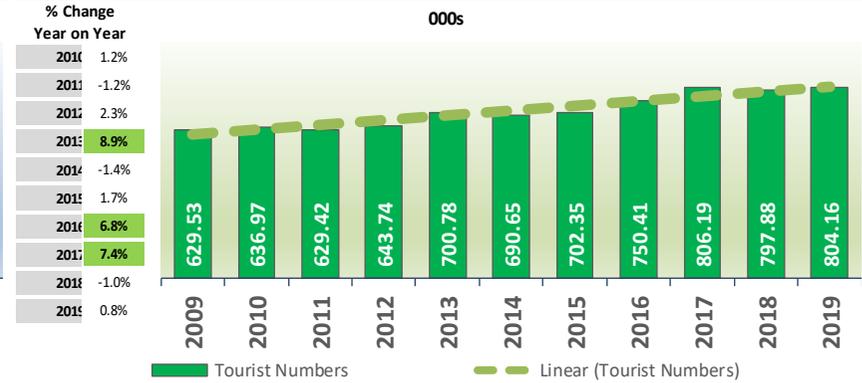
TOTAL

KEY MEASURES
Historic Prices

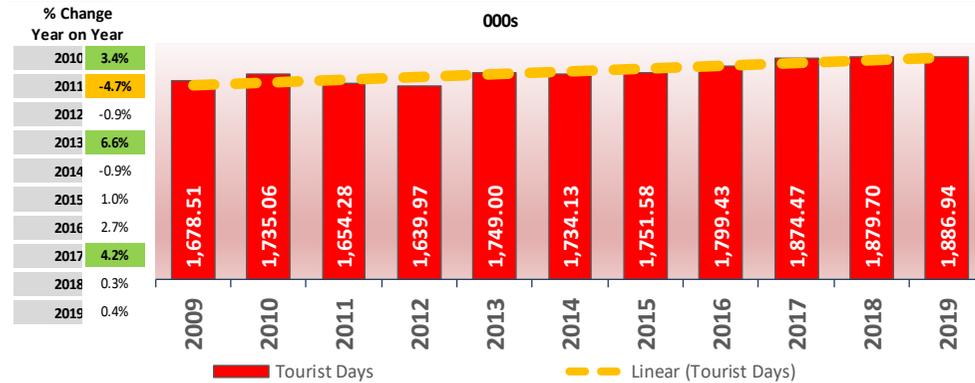
Economic Impact - Historic Prices - Total



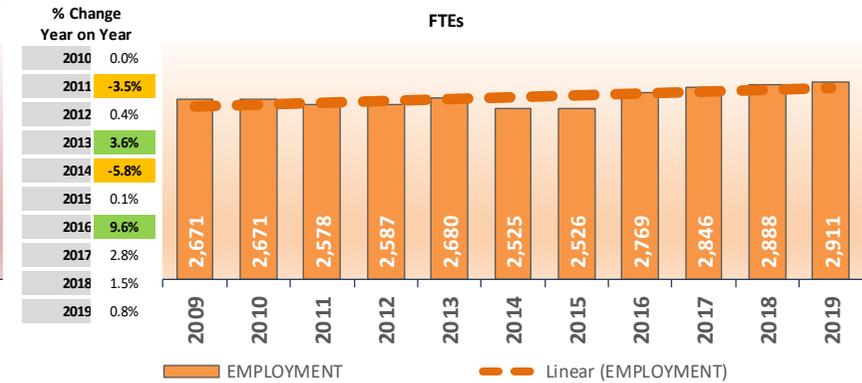
Visitor Numbers - Total



Visitor Days - Total



Total Employment Supported - Total



% Change from 2009	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Impact - Historic Prices		5.5%	5.2%	8.7%	18.1%	27.3%	32.0%	46.8%	60.8%	61.7%	67.4%
Visitor Numbers		1.2%	0.0%	2.3%	11.3%	9.7%	11.6%	19.2%	28.1%	26.7%	27.7%
Visitor Days		3.4%	-1.4%	-2.3%	4.2%	3.3%	4.4%	7.2%	11.7%	12.0%	12.4%
Total Employment		0.0%	-3.5%	-3.2%	0.3%	-5.5%	-5.4%	3.7%	6.5%	8.1%	9.0%

"Linear" = Linear Trendline

STEAM FINAL TREND REPORT FOR 2009-2019

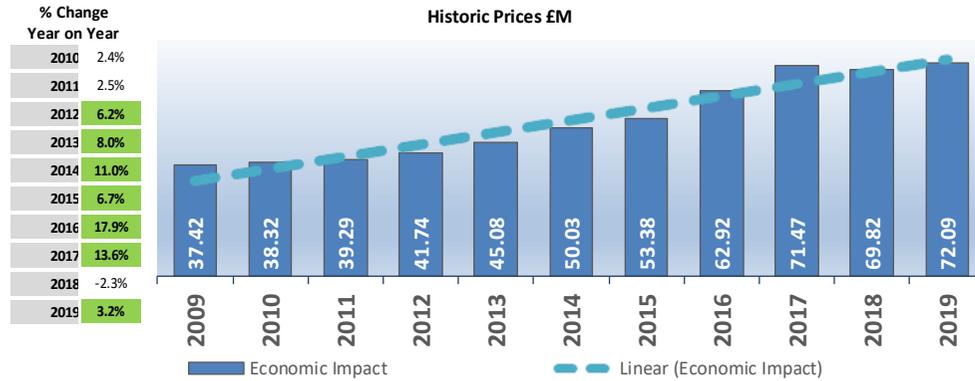
VISIT MORAY SPEYSIDE

2009 to 2019
Historic Prices

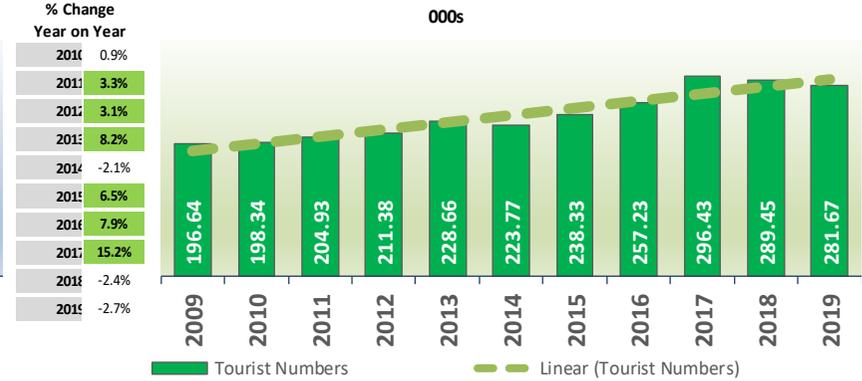
SERVICED
ACCOMMODATION

KEY MEASURES
Historic Prices

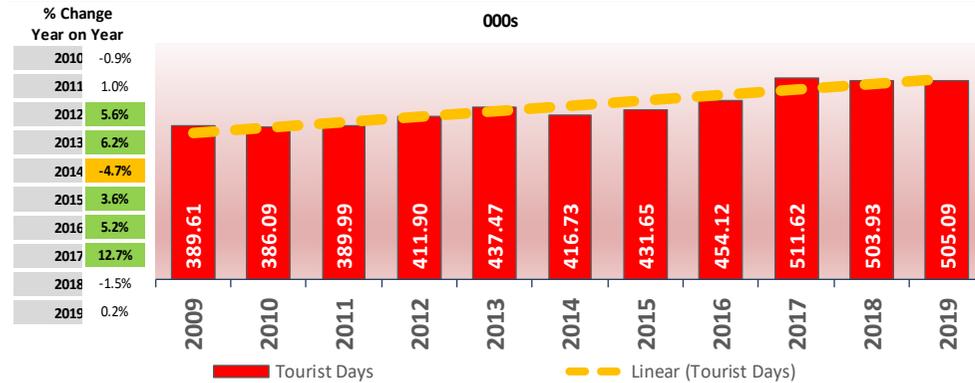
Economic Impact - Historic Prices - Serviced Accommodation



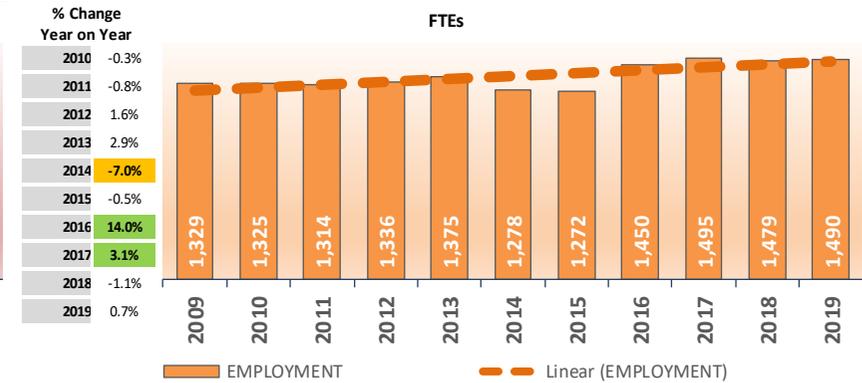
Visitor Numbers - Serviced Accommodation



Visitor Days - Serviced Accommodation



Direct Employment Supported - Serviced Accommodation



% Change from 2009	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Impact - Historic Prices		2.4%	5.0%	11.5%	20.5%	33.7%	42.6%	68.1%	91.0%	86.6%	92.7%
Visitor Numbers		0.9%	4.2%	7.5%	16.3%	13.8%	21.2%	30.8%	50.7%	47.2%	43.2%
Visitor Days		-0.9%	0.1%	5.7%	12.3%	7.0%	10.8%	16.6%	31.3%	29.3%	29.6%
Direct Employment		-0.3%	-1.1%	0.5%	3.5%	-3.8%	-4.3%	9.1%	12.5%	11.3%	12.2%

"Linear" = Linear Trendline

STEAM FINAL TREND REPORT FOR 2009-2019

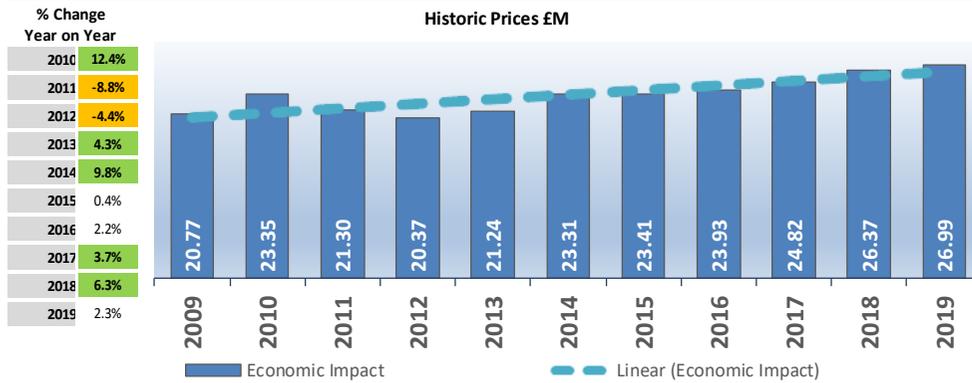
VISIT MORAY SPEYSIDE

2009 to 2019
Historic Prices

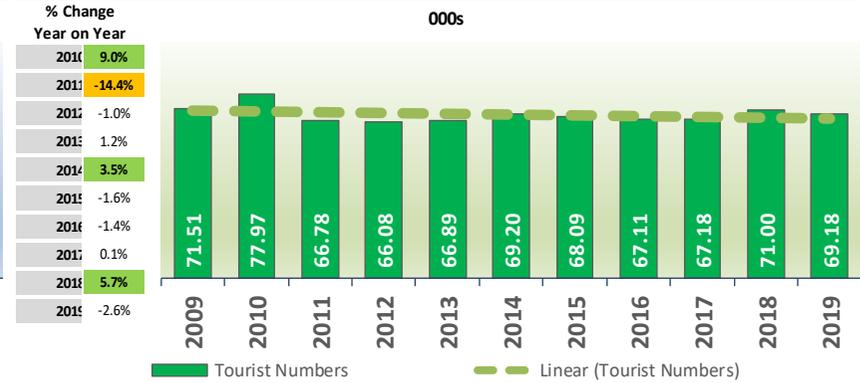
NON-SERVICED
ACCOMMODATION

KEY MEASURES
Historic Prices

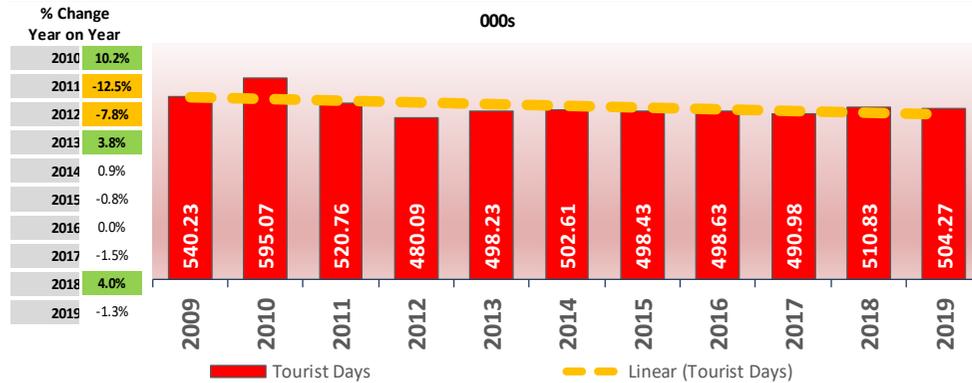
Economic Impact - Historic Prices - Non-Serviced Accommodation



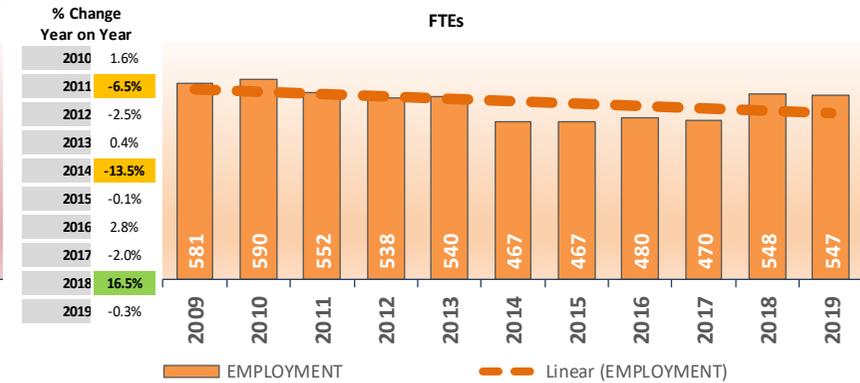
Visitor Numbers - Non-Serviced Accommodation



Visitor Days - Non-Serviced Accommodation



Direct Employment Supported - Non-Serviced Accommodation



% Change from 2009	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Impact - Historic Prices		12.4%	2.5%	-1.9%	2.3%	12.2%	12.7%	15.2%	19.5%	27.0%	30.0%
Visitor Numbers		9.0%	-6.6%	-7.6%	-6.5%	-3.2%	-4.8%	-6.2%	-6.1%	-0.7%	-3.3%
Visitor Days		10.2%	-3.6%	-11.1%	-7.8%	-7.0%	-7.7%	-7.7%	-9.1%	-5.4%	-6.7%
Direct Employment		1.6%	-5.1%	-7.4%	-7.1%	-19.6%	-19.7%	-17.4%	-19.1%	-5.7%	-6.0%

"Linear" = Linear Trendline

STEAM FINAL TREND REPORT FOR 2009-2019

VISIT MORAY SPEYSIDE

2009 to 2019

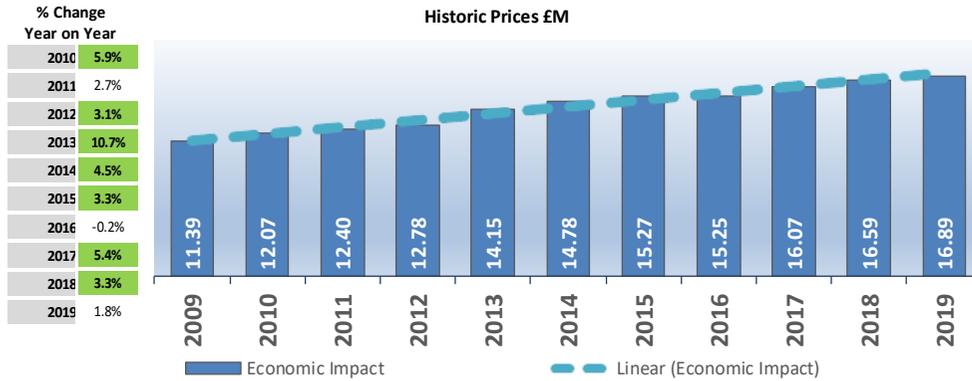
Historic Prices

SFR

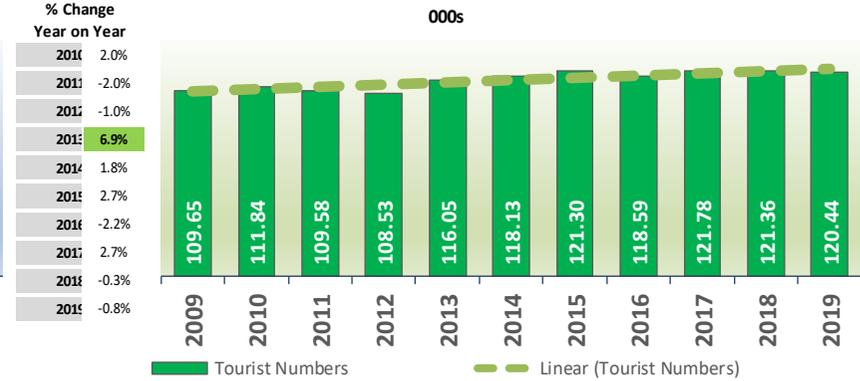
KEY MEASURES

Historic Prices

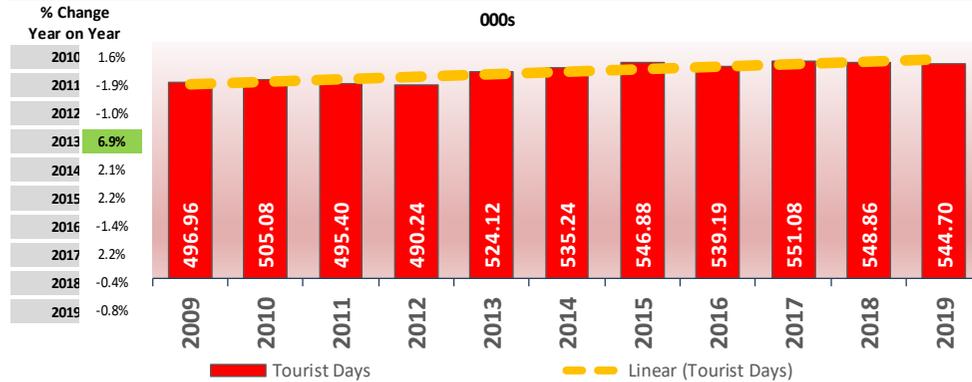
Economic Impact - Historic Prices - SFR



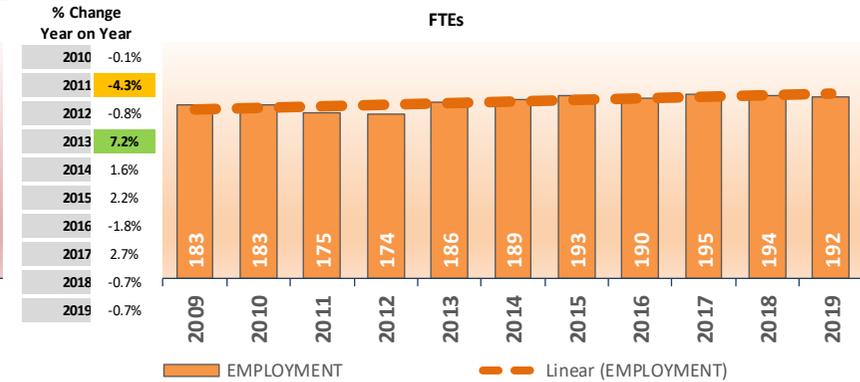
Visitor Numbers - SFR



Visitor Days - SFR



Direct Employment Supported - SFR



% Change from 2009	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Impact - Historic Prices		5.9%	8.8%	12.2%	24.2%	29.8%	34.0%	33.8%	41.0%	45.6%	48.2%
Visitor Numbers		2.0%	-0.1%	-1.0%	5.8%	7.7%	10.6%	8.2%	11.1%	10.7%	9.8%
Visitor Days		1.6%	-0.3%	-1.4%	5.5%	7.7%	10.0%	8.5%	10.9%	10.4%	9.6%
Direct Employment		-0.1%	-4.4%	-5.1%	1.7%	3.4%	5.6%	3.7%	6.5%	5.8%	5.0%

"Linear" = Linear Trendline

STEAM FINAL TREND REPORT FOR 2009-2019

VISIT MORAY SPEYSIDE

2009 to 2019
Historic Prices

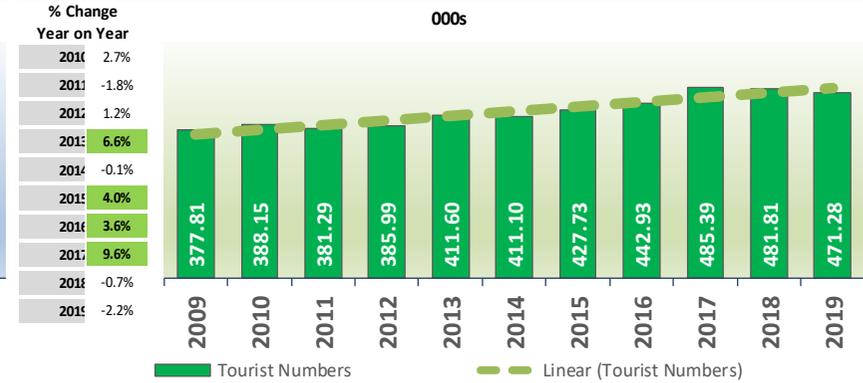
STAYING VISITOR

KEY MEASURES
Historic Prices

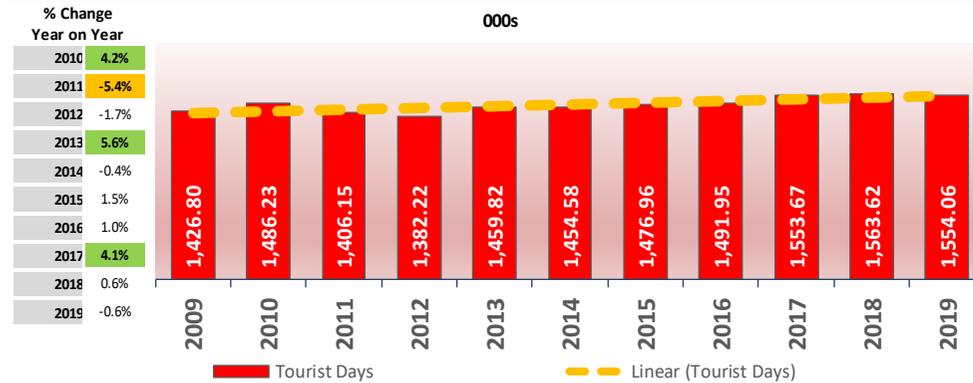
Economic Impact - Historic Prices - Staying Visitor



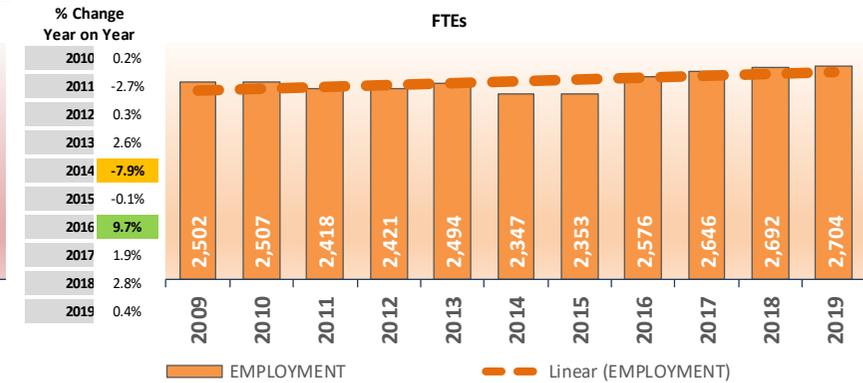
Visitor Numbers - Staying Visitor



Visitor Days - Staying Visitor



Direct Employment Supported - Staying Visitor



% Change from 2009	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Impact - Historic Prices		6.0%	4.9%	7.6%	15.6%	26.6%	32.3%	46.7%	61.5%	62.1%	66.7%
Visitor Numbers		2.7%	0.9%	2.2%	8.9%	8.8%	13.2%	17.2%	28.5%	27.5%	24.7%
Visitor Days		4.2%	-1.4%	-3.1%	2.3%	1.9%	3.5%	4.6%	8.9%	9.6%	8.9%
Direct Employment		0.2%	-3.3%	-3.2%	-0.3%	-6.2%	-5.9%	3.0%	5.8%	7.6%	8.1%

"Linear" = Linear Trendline

STEAM FINAL TREND REPORT FOR 2009-2019

VISIT MORAY SPEYSIDE

2009 to 2019
Historic Prices

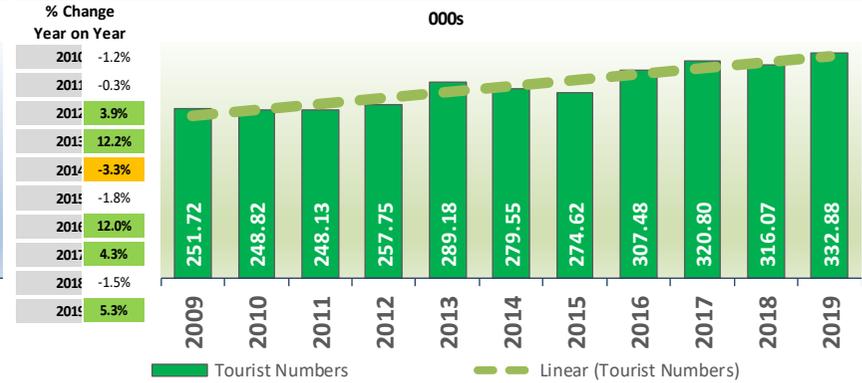
DAY VISITOR

KEY MEASURES
Historic Prices

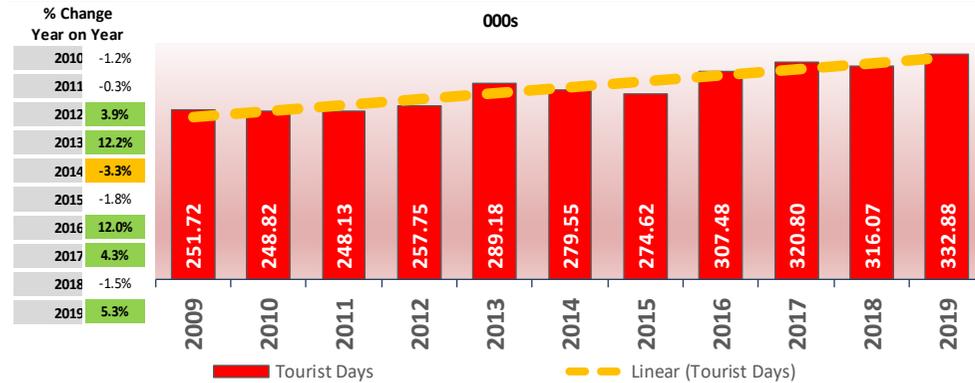
Economic Impact - Historic Prices - Day Visitor



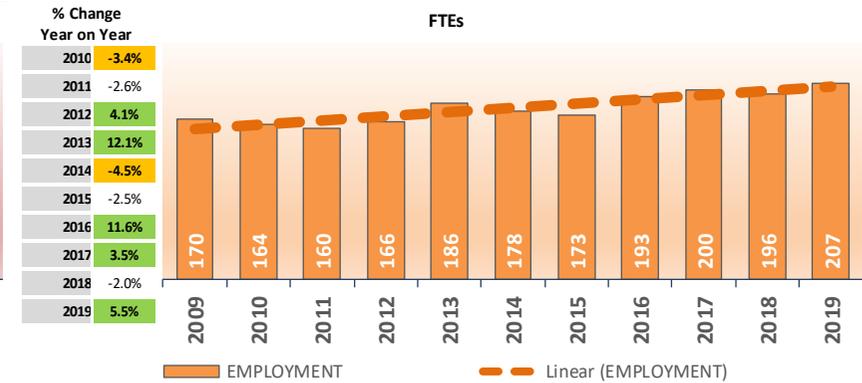
Visitor Numbers - Day Visitor



Visitor Days - Day Visitor



Direct Employment Supported - Day Visitor



% Change from 2009	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Impact - Historic Prices		2.4%	7.0%	15.8%	34.1%	31.6%	29.8%	47.3%	56.5%	59.5%	72.5%
Visitor Numbers		-1.2%	-1.4%	2.4%	14.9%	11.1%	9.1%	22.2%	27.4%	25.6%	32.2%
Visitor Days		-1.2%	-1.4%	2.4%	14.9%	11.1%	9.1%	22.2%	27.4%	25.6%	32.2%
Direct Employment		-3.4%	-6.0%	-2.1%	9.8%	4.8%	2.2%	14.0%	18.0%	15.6%	22.0%

"Linear" = Linear Trendline

Distribution of Key Impacts by Visitor Type, Month and Sector for the Period 2009 to 2019

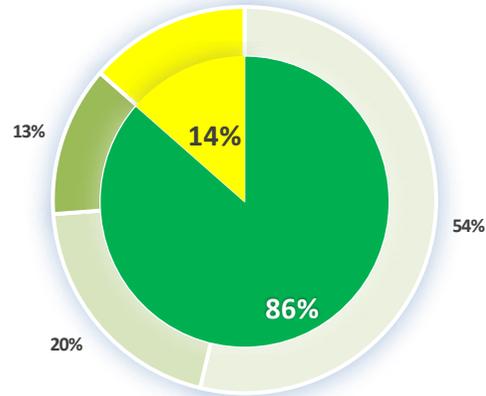
Visitor Types: *Total*
Serviced Accommodation
Non-Serviced Accommodation
SFR
Staying Visitor
Day Visitor

Economic Impact - Historic Prices - £M - Share of Total

Visitor Numbers - 2019 - M - Share of Total

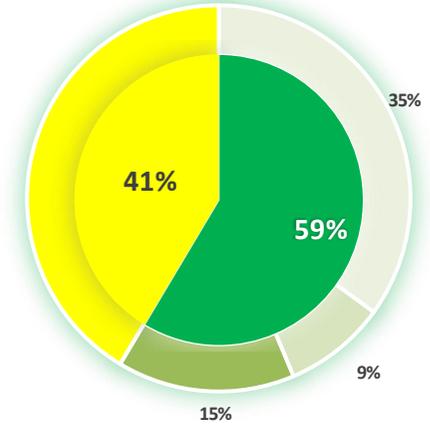
TOTAL
£134.18m

	£M
Serviced	72.09
Non-Serviced	26.99
SFR	16.89
Staying Visitor	115.97
Day Visitor	18.21
Total	134.18



TOTAL
0.80m

	M
Serviced	0.28
Non-Serviced	0.07
SFR	0.12
Staying Visitor	0.47
Day Visitor	0.33
Total	0.80

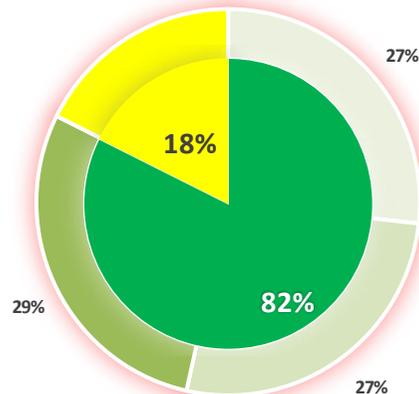


Visitor Days - 2019 - M - Share of Total

Direct Employment Supported - 2019 - FTEs - Share of Total

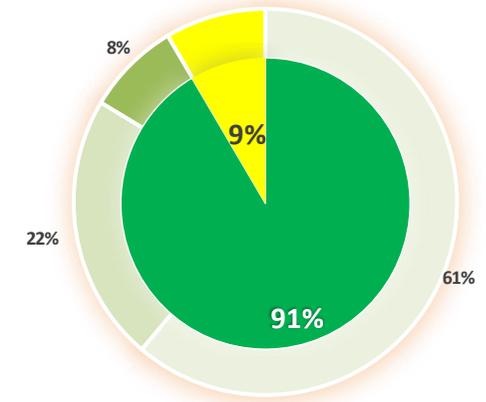
TOTAL
1.89m

	M
Serviced	0.51
Non-Serviced	0.50
SFR	0.54
Staying Visitor	1.55
Day Visitor	0.33
Total	1.89



TOTAL
2,436 Direct FTEs
2,911 Total FTEs

	FTEs
Serviced	1,490
Non-Serviced	547
SFR	192
Staying Visitor	2,229
Day Visitor	207
Total	2,436



STEAM FINAL TREND REPORT FOR 2009-2019

VISIT MORAY SPEYSIDE

2019

Historic Prices

TOTAL

DISTRIBUTION BY MONTH

Historic Prices

Economic Impact - Historic Prices - £M - Distribution of Impact by Month



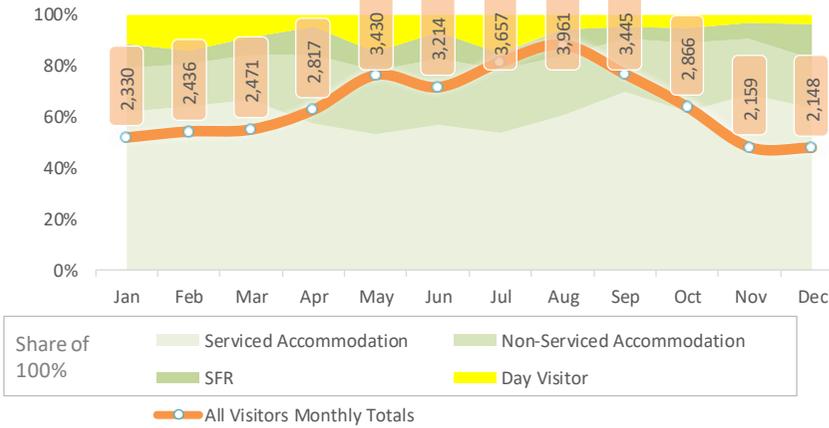
Visitor Numbers - 2019 - 000s - Distribution of Impact by Month



Visitor Days - 2019 - 000s - Distribution of Impact by Month

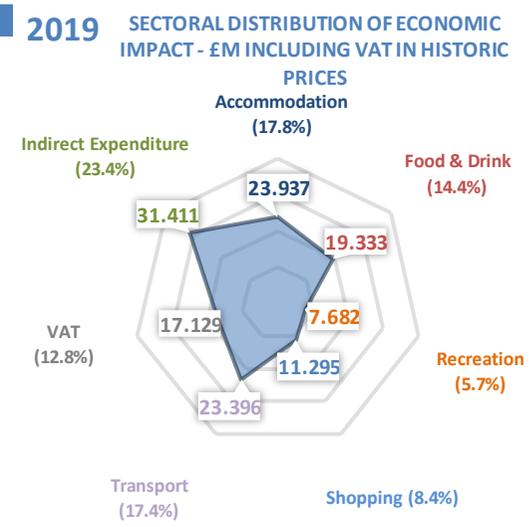


Direct Employment Supported - 2019 - FTEs - Distribution of Impact by Month



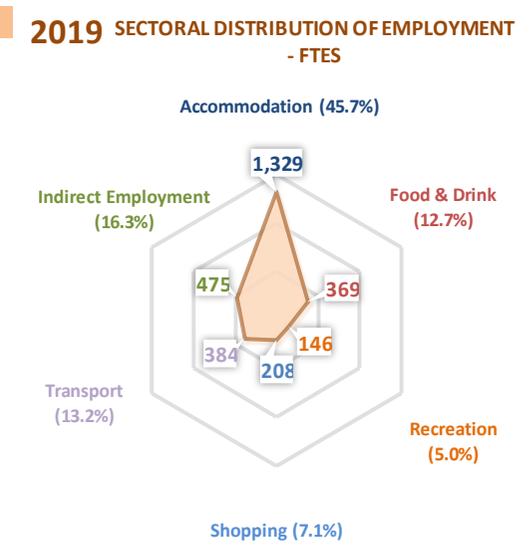
SECTORAL DISTRIBUTION OF ECONOMIC IMPACT - £M INCLUDING VAT IN HISTORIC PRICES

SECTOR / YEAR	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Accommodation £M	15.62	15.67	14.82	15.25	16.17	17.53	20.05	22.18	25.32	23.02	23.94
Food & Drink £M	11.54	12.00	11.91	12.54	13.88	14.88	14.86	16.55	18.05	18.69	19.33
Recreation £M	5.069	5.221	5.227	5.529	6.133	6.128	6.200	6.650	7.179	7.388	7.682
Shopping £M	6.847	7.118	7.032	7.298	8.048	8.679	8.709	9.699	10.45	10.91	11.30
Transport £M	13.96	14.67	14.50	14.74	15.89	17.63	17.48	19.99	21.32	22.73	23.40
Direct Revenue £M	53.04	54.67	53.50	55.36	60.12	64.85	67.29	75.07	82.32	82.74	85.64
VAT £M	7.956	9.568	10.70	11.07	12.02	12.97	13.46	15.01	16.46	16.55	17.13
Direct Expenditure £M	61.00	64.24	64.19	66.43	72.15	77.82	80.75	90.09	98.78	99.29	102.77
Indirect Expenditure £M	19.14	20.31	20.09	20.68	22.48	24.20	25.01	27.55	30.10	30.34	31.41
TOTAL £M	80.14	84.55	84.28	87.11	94.63	102.02	105.76	117.64	128.88	129.63	134.18



SECTORAL DISTRIBUTION OF EMPLOYMENT - FTES

SECTOR / YEAR	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Accommodation FTEs	1,354	1,350	1,340	1,354	1,375	1,158	1,162	1,276	1,270	1,319	1,329
Food & Drink FTEs	298	299	282	286	306	320	316	346	368	366	369
Recreation FTEs	130	129	123	125	134	131	131	138	145	144	146
Shopping FTEs	170	171	160	160	171	179	178	195	205	206	208
Transport FTEs	310	314	295	288	301	325	319	359	373	382	384
Direct Employment FTEs	2,263	2,262	2,201	2,214	2,288	2,113	2,106	2,313	2,361	2,417	2,436
Indirect Employment FTEs	409	409	377	373	393	412	421	456	485	471	475
TOTAL FTEs	2,671	2,671	2,578	2,587	2,680	2,525	2,526	2,769	2,846	2,888	2,911



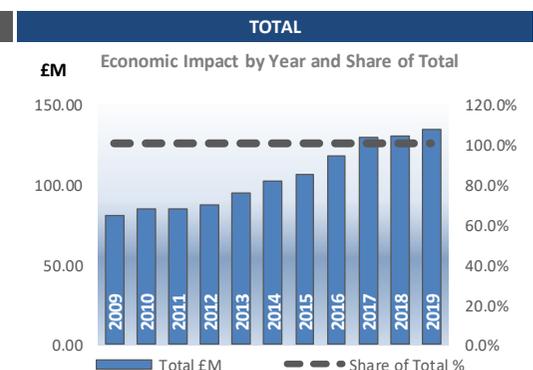
Note: This report caters for a period of up to 12 years. Parts of this page are intentionally left blank to accommodate new data as it becomes available.

Unindexed Economic Impact by Month, Year and Visitor Type for the Period 2009 to 2019

Visitor Types: *Total*
Serviced Accommodation
Non-Serviced Accommodation
SFR
Staying Visitor
Day Visitor

STEAM FINAL TREND REPORT FOR 2009-2019 VISIT MORAY SPEYSIDE													2009 to 2019 Historic Prices		TOTAL		ECONOMIC IMPACT Historic Prices				
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER						
KEY		TOTAL											TOTAL						% Change		
An increase of 3% or more		ECONOMIC IMPACT £M - IN HISTORIC PRICES / PERCENTAGE CHANGES											TOTAL		% Change		QUARTER				
Less than 3% change		Q1			Q2			Q3			Q4										
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL		% Change		Q1	Q2	Q3	Q4
% Change 2009 to 2019		29.2%	61.3%	54.0%	85.4%	86.4%	74.5%	55.2%	68.0%	97.0%	72.9%	45.9%	64.1%	67.4%	Annual Change	47.7%	81.8%	69.8%	62.4%		
% Change 2018 to 2019		5.9%	6.7%	5.2%	4.8%	3.9%	3.2%	3.7%	3.5%	3.3%	3.1%	-3.6%	1.1%	3.5%		5.9%	3.9%	3.5%	0.7%		
Average Annual Change		2.9%	6.1%	5.4%	8.5%	8.6%	7.4%	5.5%	6.8%	9.7%	7.3%	4.6%	6.4%	6.7%		4.8%	8.2%	7.0%	6.2%		
2009	£M	5.294	4.742	5.207	5.800	7.671	7.537	11.29	11.50	6.806	6.355	4.356	3.575	80.14		15.24	21.01	29.60	14.29		
2010	£M	4.943	4.506	6.796	6.716	8.662	9.229	10.97	11.46	7.231	6.811	3.707	3.517	84.55	5.5%	16.24	24.61	29.66	14.04		
2011	£M	4.234	5.279	6.193	7.382	7.887	8.734	10.72	11.29	6.801	7.067	4.359	4.341	84.28	-0.3%	15.71	24.00	28.81	15.77		
2012	£M	5.998	5.750	6.997	6.773	7.440	9.083	11.12	11.72	7.526	6.459	3.941	4.309	87.11	3.4%	18.74	23.30	30.36	14.71		
2013	£M	6.234	6.241	8.609	7.416	8.510	9.282	12.87	13.02	7.950	6.874	3.820	3.806	94.63	8.6%	21.08	25.21	33.84	14.50		
2014	£M	5.721	6.338	6.893	7.698	10.65	10.21	13.47	14.62	8.566	7.820	4.795	5.241	102.02	7.8%	18.95	28.56	36.65	17.86		
2015	£M	6.455	6.535	7.061	7.966	11.00	10.21	13.98	13.95	8.766	8.800	5.366	5.667	105.76	3.7%	20.05	29.18	36.69	19.83		
2016	£M	5.391	6.400	7.978	8.358	12.22	12.19	17.00	16.81	10.33	9.667	5.267	6.027	117.64	11.2%	19.77	32.77	44.14	20.96		
2017	£M	7.530	7.432	7.831	10.28	13.54	13.09	18.12	17.60	11.17	10.20	6.222	5.858	128.88	9.6%	22.79	36.91	46.89	22.28		
2018	£M	6.457	7.168	7.620	10.26	13.76	12.74	16.91	18.68	12.99	10.65	6.594	5.801	129.63	0.6%	21.25	36.77	48.57	23.05		
2019	£M	6.840	7.648	8.020	10.75	14.30	13.15	17.53	19.33	13.41	10.98	6.356	5.865	134.18	3.5%	22.51	38.20	50.27	23.21		

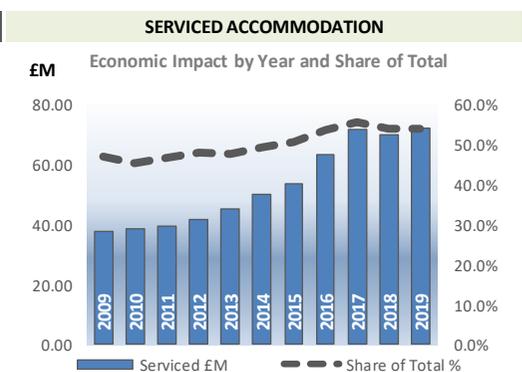
ECONOMIC IMPACT - IN HISTORIC PRICES												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total	£M	80.14	84.55	84.28	87.11	94.63	102.02	105.76	117.64	128.88	129.63	134.18
All Visitor Types	£M	80.14	84.55	84.28	87.11	94.63	102.02	105.76	117.64	128.88	129.63	134.18
Share of Total	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual Change in Share	%											
Change in Share from 2009	%											
Avg Ann. Change in Share	%											



Note: This report caters for a period of up to 12 years. Parts of this page are intentionally left blank to accommodate new data as it becomes available.

STEAM FINAL TREND REPORT FOR 2009-2019 VISIT MORAY SPEYSIDE													2009 to 2019 Historic Prices		SERVICED ACCOMMODATION		ECONOMIC IMPACT Historic Prices			
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		SERVICED ACCOMMODATION											TOTAL						% Change	
An increase of 3% or more		ECONOMIC IMPACT £M - IN HISTORIC PRICES / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4									
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4	
% Change 2009 to 2019		22.9%	65.7%	105.1%	111.1%	107.8%	118.4%	64.9%	125.8%	154.7%	92.6%	38.1%	88.8%	92.7%	Annual Change	62.3%	112.4%	110.2%	71.2%	
% Change 2018 to 2019		3.6%	0.7%	2.6%	4.5%	3.4%	3.4%	4.3%	3.5%	2.7%	4.4%	2.2%	1.8%	3.2%		2.2%	3.7%	3.5%	3.1%	
Average Annual Change		2.3%	6.6%	10.5%	11.1%	10.8%	11.8%	6.5%	12.6%	15.5%	9.3%	3.8%	8.9%	9.3%		6.2%	11.2%	11.0%	7.1%	
2009	£M	2.873	2.587	2.440	2.378	3.050	2.911	5.144	4.915	3.510	3.122	2.878	1.611	37.42		7.901	8.340	13.57	7.612	
2010	£M	2.402	2.164	3.633	2.773	3.704	3.601	5.299	5.050	3.577	3.136	1.790	1.196	38.32	2.4%	8.199	10.08	13.93	6.122	
2011	£M	1.850	2.883	3.363	2.882	3.050	3.324	4.984	5.078	3.537	3.650	2.599	2.095	39.29	2.5%	8.096	9.256	13.60	8.344	
2012	£M	3.390	3.060	3.893	2.936	2.679	3.571	5.432	5.520	3.984	3.181	2.212	1.878	41.74	6.2%	10.34	9.185	14.94	7.271	
2013	£M	3.449	3.233	4.707	3.104	2.995	3.735	6.232	6.199	4.287	3.452	2.115	1.570	45.08	8.0%	11.39	9.835	16.72	7.136	
2014	£M	2.908	3.319	3.885	3.304	4.344	4.447	6.472	7.052	4.828	3.922	2.939	2.608	50.03	11.0%	10.11	12.10	18.35	9.468	
2015	£M	3.499	3.791	4.194	3.642	4.953	4.426	6.707	6.712	4.616	4.630	3.383	2.821	53.38	6.7%	11.48	13.02	18.03	10.83	
2016	£M	2.640	3.650	4.991	3.928	5.615	5.817	8.869	9.018	6.280	5.229	3.362	3.523	62.92	17.9%	11.28	15.36	24.17	12.11	
2017	£M	4.408	4.511	5.263	5.051	6.468	6.622	9.462	9.859	6.999	5.715	3.891	3.224	71.47	13.6%	14.18	18.14	26.32	12.83	
2018	£M	3.410	4.255	4.880	4.803	6.128	6.148	8.134	10.72	8.707	5.758	3.889	2.990	69.82	-2.3%	12.54	17.08	27.56	12.64	
2019	£M	3.531	4.287	5.005	5.020	6.339	6.357	8.483	11.10	8.939	6.013	3.974	3.043	72.09	3.2%	12.82	17.72	28.52	13.03	

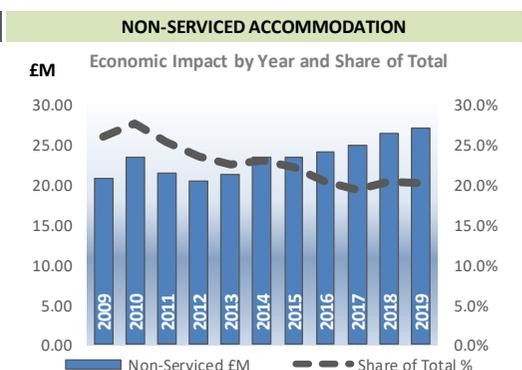
ECONOMIC IMPACT - IN HISTORIC PRICES												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Serviced	£M	37.42	38.32	39.29	41.74	45.08	50.03	53.38	62.92	71.47	69.82	72.09
All Visitor Types	£M	80.14	84.55	84.28	87.11	94.63	102.02	105.76	117.64	128.88	129.63	134.18
Share of Total	%	46.7%	45.3%	46.6%	47.9%	47.6%	49.0%	50.5%	53.5%	55.5%	53.9%	53.7%
Annual Change in Share	%		-2.9%	2.9%	2.8%	-0.6%	2.9%	2.9%	6.0%	3.7%	-2.9%	-0.3%
Change in Share from 2009	%		-2.9%	-0.2%	2.6%	2.0%	5.0%	8.1%	14.5%	18.8%	15.4%	15.1%
Avg Ann. Change in Share	%		-2.9%	-0.1%	0.9%	0.5%	1.0%	1.3%	2.1%	2.3%	1.7%	1.5%



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STEAM FINAL TREND REPORT FOR 2009-2019 VISIT MORAY SPEYSIDE													2009 to 2019 Historic Prices		NON-SERVICED ACCOMMODATION	ECONOMIC IMPACT Historic Prices			
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER				
KEY		NON-SERVICED ACCOMMODATION											TOTAL						% Change
An increase of 3% or more		ECONOMIC IMPACT £M - IN HISTORIC PRICES / PERCENTAGE CHANGES																	
Less than 3% change		Q1			Q2			Q3			Q4								
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4
% Change 2009 to 2019		-38.1%	-0.6%	43.8%	70.3%	30.0%	35.7%	15.8%	13.1%	6.5%	53.2%	276.5%	33.1%	30.0%	Annual Change	4.4%	42.4%	12.7%	74.8%
% Change 2018 to 2019		1.6%	9.2%	6.4%	5.4%	5.0%	1.9%	0.5%	2.5%	2.8%	-0.5%	-0.4%	-3.9%	2.3%	6.3%	4.0%	1.8%	-0.8%	
Average Annual Change		-3.8%	-0.1%	4.4%	7.0%	3.0%	3.6%	1.6%	1.3%	0.6%	5.3%	27.6%	3.3%	3.0%	0.4%	4.2%	1.3%	7.5%	
2009	£M	0.337	0.360	0.407	1.773	2.620	2.547	3.886	3.952	2.282	1.993	0.282	0.331	20.77		1.104	6.939	10.12	2.605
2010	£M	0.434	0.515	0.658	2.144	2.818	3.326	3.477	3.789	2.609	2.342	0.667	0.568	23.35	12.4%	1.606	8.288	9.875	3.577
2011	£M	0.297	0.347	0.418	2.521	2.628	3.000	3.462	3.594	2.194	2.055	0.430	0.352	21.30	-8.8%	1.062	8.148	9.250	2.837
2012	£M	0.274	0.348	0.428	1.904	2.427	2.970	3.282	3.527	2.409	1.917	0.467	0.417	20.37	-4.4%	1.049	7.301	9.218	2.801
2013	£M	0.161	0.261	0.682	2.191	2.667	2.864	3.754	3.745	2.329	1.904	0.400	0.278	21.24	4.3%	1.104	7.723	9.828	2.582
2014	£M	0.267	0.486	0.434	2.163	3.161	2.975	3.912	4.315	2.395	2.279	0.495	0.429	23.31	9.8%	1.187	8.299	10.62	3.203
2015	£M	0.312	0.392	0.574	2.133	2.802	3.061	3.820	4.034	2.649	2.496	0.585	0.554	23.41	0.4%	1.278	7.995	10.50	3.635
2016	£M	0.220	0.290	0.516	2.205	2.925	3.379	4.308	4.382	2.350	2.680	0.473	0.201	23.93	2.2%	1.025	8.509	11.04	3.354
2017	£M	0.171	0.280	0.397	2.709	2.997	3.362	4.341	4.289	2.350	2.730	0.800	0.390	24.82	3.7%	0.849	9.068	10.98	3.920
2018	£M	0.205	0.328	0.551	2.864	3.243	3.394	4.478	4.359	2.363	3.067	1.064	0.459	26.37	6.3%	1.084	9.501	11.20	4.590
2019	£M	0.209	0.358	0.586	3.020	3.405	3.457	4.502	4.470	2.430	3.053	1.060	0.441	26.99	2.3%	1.152	9.882	11.40	4.555

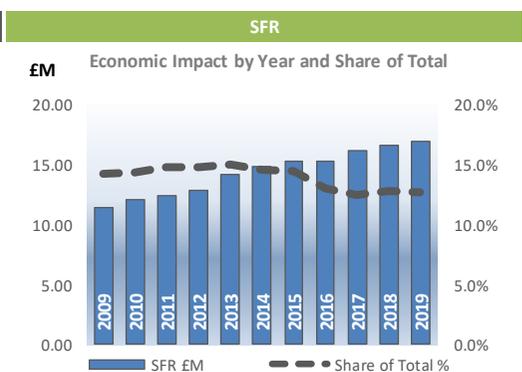
ECONOMIC IMPACT - IN HISTORIC PRICES												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Non-Serviced	£M	20.77	23.35	21.30	20.37	21.24	23.31	23.41	23.93	24.82	26.37	26.99
All Visitor Types	£M	80.14	84.55	84.28	87.11	94.63	102.02	105.76	117.64	128.88	129.63	134.18
Share of Total	%	25.9%	27.6%	25.3%	23.4%	22.4%	22.8%	22.1%	20.3%	19.3%	20.3%	20.1%
Annual Change in Share	%		6.6%	-8.5%	-7.5%	-4.0%	1.8%	-3.1%	-8.1%	-5.3%	5.7%	-1.1%
Change in Share from 2009	%		6.6%	-2.5%	-9.8%	-13.4%	-11.8%	-14.6%	-21.5%	-25.7%	-21.5%	-22.4%
Avg Ann. Change in Share	%		6.6%	-1.2%	-3.3%	-3.3%	-2.4%	-2.4%	-3.1%	-3.2%	-2.4%	-2.2%



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STEAM FINAL TREND REPORT FOR 2009-2019 VISIT MORAY SPEYSIDE													2009 to 2019 Historic Prices		SFR	ECONOMIC IMPACT Historic Prices			
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER				
KEY		SFR											TOTAL						% Change
An increase of 3% or more		ECONOMIC IMPACT £M - IN HISTORIC PRICES / PERCENTAGE CHANGES																	
Less than 3% change		Q1			Q2			Q3			Q4								
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4
% Change 2009 to 2019		27.8%	41.8%	54.3%	60.0%	50.7%	51.8%	42.0%	46.5%	51.6%	54.2%	53.6%	49.0%	48.2%	38.8%		54.3%	46.2%	51.3%
% Change 2018 to 2019		2.1%	1.5%	1.8%	2.6%	2.5%	1.7%	1.6%	1.9%	1.9%	1.4%	0.9%	1.1%	1.8%	1.8%		2.2%	1.8%	1.1%
Average Annual Change		2.8%	4.2%	5.4%	6.0%	5.1%	5.2%	4.2%	4.7%	5.2%	5.4%	5.4%	4.9%	4.8%	3.9%		5.4%	4.6%	5.1%
2009	£M	1.091	0.592	0.657	1.170	0.978	1.278	0.921	1.627	0.647	0.609	0.561	1.263	11.39	2.341		3.426	3.195	2.433
2010	£M	1.094	0.608	0.778	1.273	1.047	1.418	0.928	1.666	0.688	0.649	0.562	1.356	12.07	2.480		3.738	3.282	2.567
2011	£M	1.018	0.650	0.756	1.370	1.044	1.431	0.963	1.718	0.692	0.678	0.602	1.475	12.40	2.424		3.845	3.373	2.755
2012	£M	1.211	0.666	0.825	1.343	1.041	1.476	0.990	1.772	0.733	0.668	0.594	1.464	12.78	2.702		3.860	3.496	2.726
2013	£M	1.298	0.737	1.034	1.525	1.182	1.617	1.131	1.986	0.807	0.739	0.632	1.467	14.15	3.069		4.325	3.923	2.838
2014	£M	1.303	0.785	0.872	1.561	1.308	1.704	1.158	2.107	0.838	0.783	0.694	1.673	14.78	2.960		4.573	4.102	3.150
2015	£M	1.408	0.797	0.923	1.582	1.299	1.716	1.166	2.085	0.856	0.840	0.771	1.827	15.27	3.128		4.597	4.108	3.438
2016	£M	1.215	0.729	0.951	1.601	1.324	1.797	1.237	2.200	0.871	0.846	0.708	1.767	15.25	2.895		4.722	4.308	3.321
2017	£M	1.413	0.798	0.953	1.773	1.388	1.883	1.263	2.243	0.904	0.877	0.784	1.790	16.07	3.164		5.044	4.410	3.451
2018	£M	1.366	0.828	0.996	1.826	1.438	1.908	1.287	2.339	0.963	0.927	0.853	1.861	16.59	3.190		5.172	4.589	3.641
2019	£M	1.394	0.840	1.014	1.873	1.474	1.941	1.307	2.384	0.981	0.940	0.861	1.881	16.89	3.248		5.287	4.672	3.682

ECONOMIC IMPACT - IN HISTORIC PRICES												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
SFR	£M	11.39	12.07	12.40	12.78	14.15	14.78	15.27	15.25	16.07	16.59	16.89
All Visitor Types	£M	80.14	84.55	84.28	87.11	94.63	102.02	105.76	117.64	128.88	129.63	134.18
Share of Total	%	14.2%	14.3%	14.7%	14.7%	15.0%	14.5%	14.4%	13.0%	12.5%	12.8%	12.6%
Annual Change in Share	%		0.4%	3.0%	-0.2%	1.9%	-3.1%	-0.4%	-10.2%	-3.8%	2.7%	-1.7%
Change in Share from 2009	%		0.4%	3.4%	3.2%	5.2%	1.9%	1.6%	-8.9%	-12.3%	-10.0%	-11.5%
Avg Ann. Change in Share	%		0.4%	1.7%	1.1%	1.3%	0.4%	0.3%	-1.3%	-1.5%	-1.1%	-1.1%



Note: This report caters for a period of up to 12 years. Parts of this page are intentionally left blank to accommodate new data as it becomes available.

STEAM FINAL TREND REPORT FOR 2009-2019 VISIT MORAY SPEYSIDE													2009 to 2019 Historic Prices		STAYING VISITOR	ECONOMIC IMPACT Historic Prices			
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER				
KEY		STAYING VISITOR																	
An increase of 3% or more		ECONOMIC IMPACT £M - IN HISTORIC PRICES / PERCENTAGE CHANGES																	
Less than 3% change		Q1			Q2			Q3			Q4			TOTAL	% Change				
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4
% Change 2009 to 2019		19.4%	55.0%	88.4%	86.3%	68.8%	74.5%	43.6%	71.1%	91.8%	74.8%	58.5%	67.4%	66.7%	Annual Change	51.8%	75.8%	65.9%	68.1%
% Change 2018 to 2019		3.1%	1.4%	2.8%	4.4%	3.8%	2.7%	2.8%	3.1%	2.6%	2.6%	1.5%	1.0%	2.8%		2.4%	3.6%	2.9%	1.9%
Average Annual Change		1.9%	5.5%	8.8%	8.6%	6.9%	7.5%	4.4%	7.1%	9.2%	7.5%	5.8%	6.7%	6.7%		5.2%	7.6%	6.6%	6.8%
2009	£M	4.301	3.539	3.505	5.321	6.648	6.736	9.951	10.49	6.439	5.724	3.721	3.205	69.58		11.35	18.71	26.88	12.65
2010	£M	3.930	3.286	5.070	6.190	7.569	8.345	9.704	10.50	6.875	6.127	3.019	3.120	73.74	6.0%	12.29	22.10	27.08	12.27
2011	£M	3.164	3.880	4.538	6.773	6.722	7.754	9.408	10.39	6.423	6.383	3.631	3.922	72.99	-1.0%	11.58	21.25	26.22	13.94
2012	£M	4.875	4.074	5.146	6.183	6.147	8.017	9.704	10.82	7.127	5.766	3.273	3.758	74.89	2.6%	14.10	20.35	27.65	12.80
2013	£M	4.908	4.231	6.423	6.821	6.845	8.216	11.12	11.93	7.423	6.095	3.147	3.315	80.47	7.5%	15.56	21.88	30.47	12.56
2014	£M	4.478	4.590	5.191	7.029	8.813	9.127	11.54	13.47	8.061	6.983	4.127	4.710	88.12	9.5%	14.26	24.97	33.08	15.82
2015	£M	5.218	4.981	5.691	7.356	9.054	9.203	11.69	12.83	8.122	7.966	4.738	5.203	92.06	4.5%	15.89	25.61	32.65	17.91
2016	£M	4.074	4.669	6.457	7.734	9.864	10.99	14.41	15.60	9.501	8.754	4.543	5.491	102.09	10.9%	15.20	28.59	39.51	18.79
2017	£M	5.991	5.589	6.613	9.534	10.85	11.87	15.07	16.39	10.25	9.322	5.475	5.403	112.36	10.1%	18.19	32.25	41.71	20.20
2018	£M	4.981	5.411	6.426	9.493	10.81	11.45	13.90	17.42	12.03	9.753	5.806	5.310	112.79	0.4%	16.82	31.75	43.35	20.87
2019	£M	5.134	5.484	6.605	9.913	11.22	11.76	14.29	17.95	12.35	10.01	5.896	5.364	115.97	2.8%	17.22	32.89	44.60	21.27

ECONOMIC IMPACT - IN HISTORIC PRICES												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Staying Visitor	£M	69.58	73.74	72.99	74.89	80.47	88.12	92.06	102.09	112.36	112.79	115.97
All Visitor Types	£M	80.14	84.55	84.28	87.11	94.63	102.02	105.76	117.64	128.88	129.63	134.18
Share of Total	%	86.8%	87.2%	86.6%	86.0%	85.0%	86.4%	87.0%	86.8%	87.2%	87.0%	86.4%
Annual Change in Share	%		0.4%	-0.7%	-0.7%	-1.1%	1.6%	0.8%	-0.3%	0.5%	-0.2%	-0.7%
Change in Share from 2009	%		0.4%	-0.3%	-1.0%	-2.1%	-0.5%	0.2%	0.0%	0.4%	0.2%	-0.5%
Avg Ann. Change in Share	%		0.4%	-0.1%	-0.3%	-0.5%	-0.1%	0.0%	0.0%	0.1%	0.0%	0.0%



Note: This report caters for a period of up to 12 years. Parts of this page are intentionally left blank to accommodate new data as it becomes available.

STEAM FINAL TREND REPORT FOR 2009-2019 VISIT MORAY SPEYSIDE													2009 to 2019 Historic Prices		DAY VISITOR		ECONOMIC IMPACT Historic Prices			
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		DAY VISITOR											TOTAL						% Change	
An increase of 3% or more		ECONOMIC IMPACT £M - IN HISTORIC PRICES / PERCENTAGE CHANGES											TOTAL		% Change		QUARTER			
Less than 3% change		Q1			Q2			Q3			Q4									
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4	
% Change 2009 to 2019		71.8%	79.9%	-16.9%	75.5%	200.7%	74.3%	141.1%	36.0%	189.0%	55.1%	-27.6%	35.3%	72.5%	Annual Change	35.6%	130.7%	108.5%	18.5%	
% Change 2018 to 2019		15.6%	23.1%	18.5%	9.7%	4.2%	8.0%	7.7%	9.3%	11.3%	8.6%	-41.6%	2.0%	8.2%	Annual Change	19.3%	6.0%	8.8%	-11.0%	
Average Annual Change		7.2%	8.0%	-1.7%	7.6%	20.1%	7.4%	14.1%	3.6%	18.9%	5.5%	-2.8%	3.5%	7.2%	Annual Change	3.6%	13.1%	10.9%	1.9%	
2009	£M	0.993	1.202	1.702	0.479	1.024	0.801	1.344	1.011	0.366	0.631	0.636	0.370	10.56	2.4%	3.897	2.304	2.721	1.636	
2010	£M	1.013	1.219	1.726	0.526	1.093	0.884	1.265	0.957	0.356	0.684	0.689	0.397	10.81		3.959	2.504	2.577	1.770	
2011	£M	1.069	1.399	1.656	0.610	1.165	0.979	1.308	0.901	0.378	0.684	0.727	0.419	11.30		4.124	2.754	2.587	1.831	
2012	£M	1.123	1.675	1.852	0.590	1.293	1.066	1.414	0.897	0.399	0.693	0.668	0.551	12.22		4.650	2.949	2.711	1.912	
2013	£M	1.326	2.011	2.187	0.595	1.665	1.066	1.751	1.087	0.527	0.780	0.673	0.491	14.16		5.523	3.325	3.365	1.944	
2014	£M	1.243	1.748	1.702	0.669	1.836	1.083	1.931	1.142	0.506	0.837	0.668	0.531	13.90		-1.8%	4.693	3.588	3.579	2.036
2015	£M	1.237	1.554	1.370	0.610	1.950	1.009	2.285	1.120	0.644	0.834	0.628	0.463	13.70		-1.4%	4.161	3.570	4.048	1.925
2016	£M	1.317	1.731	1.521	0.625	2.360	1.197	2.582	1.209	0.833	0.913	0.724	0.536	15.55		13.4%	4.569	4.182	4.623	2.173
2017	£M	1.539	1.843	1.218	0.750	2.683	1.224	3.054	1.211	0.918	0.881	0.746	0.454	16.52		6.3%	4.600	4.657	5.183	2.082
2018	£M	1.476	1.757	1.194	0.767	2.954	1.292	3.007	1.258	0.952	0.901	0.788	0.491	16.84		1.9%	4.427	5.013	5.216	2.180
2019	£M	1.706	2.163	1.415	0.841	3.079	1.396	3.239	1.375	1.059	0.979	0.460	0.500	18.21	8.2%	5.283	5.315	5.673	1.939	

ECONOMIC IMPACT - IN HISTORIC PRICES												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Day Visitor	£M	10.56	10.81	11.30	12.22	14.16	13.90	13.70	15.55	16.52	16.84	18.21
All Visitor Types	£M	80.14	84.55	84.28	87.11	94.63	102.02	105.76	117.64	128.88	129.63	134.18
Share of Total	%	13.2%	12.8%	13.4%	14.0%	15.0%	13.6%	13.0%	13.2%	12.8%	13.0%	13.6%
Annual Change in Share	%		-2.9%	4.8%	4.7%	6.6%	-9.0%	-4.9%	2.0%	-3.0%	1.3%	4.5%
Change in Share from 2009	%		-2.9%	1.7%	6.5%	13.6%	3.4%	-1.6%	0.3%	-2.7%	-1.4%	3.0%
Avg Ann. Change in Share	%		-2.9%	0.9%	2.2%	3.4%	0.7%	-0.3%	0.0%	-0.3%	-0.2%	0.3%



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Visitor Numbers by Month, Year and Visitor Type for the Period 2009 to 2019

Visitor Types: *Total*
Serviced Accommodation
Non-Serviced Accommodation
SFR
Staying Visitor
Day Visitor

STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		TOTAL		VISITOR NUMBERS				
VISIT MORAY SPEYSIDE																					
VISITOR NUMBERS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER						
KEY		TOTAL																			
An increase of 3% or more		VISITOR NUMBERS IN THOUSANDS / PERCENTAGE CHANGES																			
Less than 3% change		Q1			Q2			Q3			Q4			TOTAL		% Change					
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC					Q1	Q2	Q3	Q4
% Change 2009 to 2019		11.6%	18.9%	-17.4%	28.8%	66.6%	31.9%	42.1%	26.5%	60.5%	22.2%	-6.4%	13.0%	27.7%	Annual Change		2.5%	44.8%	40.5%	10.6%	
% Change 2018 to 2019		5.1%	10.8%	3.4%	0.6%	-0.4%	1.1%	1.9%	3.5%	-2.5%	-2.5%	-12.8%	-0.7%	0.8%			6.5%	0.3%	1.2%	-5.0%	
Average Annual Change		1.2%	1.9%	-1.7%	2.9%	6.7%	3.2%	4.2%	2.6%	6.1%	2.2%	-0.6%	1.3%	2.8%			0.3%	4.5%	4.0%	1.1%	
2009	000s	41.6	43.7	55.0	46.0	69.2	60.3	78.2	74.4	45.8	46.6	36.3	32.4	629.5			140.4	175.5	198.4	115.3	
2010	000s	39.8	42.0	59.5	49.7	73.6	67.0	73.1	73.0	47.8	47.2	33.6	30.7	637.0	1.2%			141.3	190.3	193.9	111.5
2011	000s	36.3	46.8	52.7	52.4	69.3	65.3	72.5	69.6	44.6	48.1	36.6	35.3	629.4	-1.2%			135.8	187.0	186.7	119.9
2012	000s	42.1	49.4	57.2	46.7	70.4	69.1	76.3	71.5	49.3	43.8	32.6	35.5	643.7	2.3%			148.7	186.2	197.1	111.8
2013	000s	45.5	55.5	69.9	49.0	81.5	70.0	86.1	79.2	53.1	47.8	31.1	32.0	700.8	8.9%			171.0	200.5	218.4	110.9
2014	000s	41.2	49.1	50.5	50.7	89.1	70.3	85.6	81.6	51.1	48.6	34.9	37.9	690.6	-1.4%			140.8	210.1	218.3	121.4
2015	000s	43.2	47.2	45.9	47.9	91.5	65.6	92.1	78.6	53.1	55.6	40.9	40.8	702.3	1.7%			136.2	205.0	223.8	137.2
2016	000s	38.9	45.3	50.9	49.3	102.4	73.4	106.3	87.2	64.1	54.6	36.1	42.1	750.4	6.8%			135.1	225.1	257.6	132.7
2017	000s	49.8	49.8	45.7	59.8	112.7	81.5	116.6	86.6	68.5	57.3	39.5	38.3	806.2	7.4%			145.3	254.0	271.8	135.1
2018	000s	44.1	47.0	44.0	58.8	115.7	78.7	109.0	90.9	75.4	58.4	38.9	36.9	797.9	-1.0%			135.1	253.2	275.3	134.3
2019	000s	46.4	52.0	45.5	59.2	115.3	79.5	111.1	94.1	73.5	57.0	34.0	36.7	804.2	0.8%			143.9	254.0	278.6	127.6

VISITOR NUMBERS												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total	000s	629.5	637.0	629.4	643.7	700.8	690.6	702.3	750.4	806.2	797.9	804.2
All Visitor Types	000s	629.5	637.0	629.4	643.7	700.8	690.6	702.3	750.4	806.2	797.9	804.2
Share of Total	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual Change in Share	%											
Change in Share from 2009	%											
Avg Ann. Change in Share	%											



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STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		SERVICED		VISITOR NUMBERS			
VISIT MORAY SPEYSIDE																				
VISITOR NUMBERS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		SERVICED ACCOMMODATION																		
An increase of 3% or more		VISITOR NUMBERS IN THOUSANDS / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4		TOTAL	% Change						
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV			DEC	Q1	Q2	Q3	Q4	
% Change 2009 to 2019		3.0%	3.2%	27.7%	40.8%	44.5%	60.7%	31.8%	85.2%	87.8%	29.4%	8.3%	25.2%	43.2%	11.6%	49.3%	66.9%	21.3%		
% Change 2018 to 2019		-7.3%	-4.2%	-9.1%	-2.7%	-3.6%	-1.5%	-1.0%	4.4%	-8.0%	-7.2%	4.3%	1.2%	-2.7%	-7.1%	-2.6%	-1.6%	-2.0%		
Average Annual Change		0.3%	0.3%	2.8%	4.1%	4.5%	6.1%	3.2%	8.5%	8.8%	2.9%	0.8%	2.5%	4.3%	1.2%	4.9%	6.7%	2.1%		
2009	000s	9.9	11.2	11.3	14.4	20.1	19.3	24.4	23.5	20.5	18.2	14.3	9.5	196.6	32.4	53.8	68.4	42.0		
2010	000s	8.2	9.6	14.2	15.9	22.8	21.3	24.7	25.0	22.2	17.5	10.1	6.7	198.3	32.1	60.0	71.9	34.3		
2011	000s	6.7	12.8	12.8	16.2	20.0	20.7	24.6	25.4	20.5	20.3	13.9	11.3	204.9	3.3%	32.2	56.9	70.5	45.4	
2012	000s	11.0	11.2	14.3	11.7	20.3	23.1	28.6	28.3	24.1	17.5	11.6	9.6	211.4	3.1%	36.5	55.1	81.0	38.7	
2013	000s	11.4	12.5	19.4	13.8	22.1	24.4	30.1	30.4	26.1	19.7	10.6	8.1	228.7	8.2%	43.3	60.3	86.7	38.4	
2014	000s	9.2	10.5	12.2	14.4	24.6	25.0	27.5	30.7	25.0	18.8	14.2	11.7	223.8	-2.1%	31.8	64.1	83.2	44.6	
2015	000s	10.9	12.6	12.9	14.4	25.7	22.8	27.9	29.3	23.2	24.4	19.9	14.3	238.3	6.5%	36.4	62.9	80.4	58.6	
2016	000s	7.3	9.2	15.9	16.1	26.9	25.9	34.6	36.8	31.0	22.4	14.6	16.5	257.2	7.9%	32.3	69.0	102.4	53.5	
2017	000s	14.1	12.3	16.9	22.0	31.3	34.3	37.2	38.0	35.0	24.9	16.7	13.8	296.4	15.2%	43.3	87.6	110.1	55.5	
2018	000s	11.0	12.1	15.9	20.9	30.2	31.5	32.5	41.8	41.7	25.4	14.9	11.7	289.4	-2.4%	38.9	82.5	116.0	52.0	
2019	000s	10.2	11.6	14.4	20.3	29.1	31.0	32.2	43.6	38.4	23.6	15.5	11.9	281.7	-2.7%	36.2	80.4	114.2	51.0	

VISITOR NUMBERS												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Serviced	000s	196.6	198.3	204.9	211.4	228.7	223.8	238.3	257.2	296.4	289.4	281.7
All Visitor Types	000s	629.5	637.0	629.4	643.7	700.8	690.6	702.3	750.4	806.2	797.9	804.2
Share of Total	%	31.2%	31.1%	32.6%	32.8%	32.6%	32.4%	33.9%	34.3%	36.8%	36.3%	35.0%
Annual Change in Share	%		-0.3%	4.6%	0.9%	-0.6%	-0.7%	4.7%	1.0%	7.3%	-1.3%	-3.4%
Change in Share from 2009	%		-0.3%	4.2%	5.1%	4.5%	3.7%	8.6%	9.7%	17.7%	16.1%	12.1%
Avg Ann. Change in Share	%		-0.3%	2.1%	1.7%	1.1%	0.7%	1.4%	1.4%	2.2%	1.8%	1.2%



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STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		NON-SERVICED		VISITOR NUMBERS			
VISIT MORAY SPEYSIDE																				
VISITOR NUMBERS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		NON-SERVICED ACCOMMODATION																		
An increase of 3% or more		VISITOR NUMBERS IN THOUSANDS / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4		TOTAL	% Change						
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV			DEC	Q1	Q2	Q3	Q4	
% Change 2009 to 2019		-47.6%	-39.3%	2.5%	17.6%	-11.6%	-5.6%	-10.9%	-14.2%	-21.0%	26.7%	143.1%	35.5%	-3.3%	-26.0%	-1.7%	-14.5%	41.8%		
% Change 2018 to 2019		31.9%	4.5%	1.9%	-3.3%	-5.0%	-1.6%	-3.2%	-1.3%	-0.5%	-3.9%	-4.4%	-7.8%	-2.6%	7.2%	-3.4%	-1.9%	-4.5%		
Average Annual Change		-4.8%	-3.9%	0.3%	1.8%	-1.2%	-0.6%	-1.1%	-1.4%	-2.1%	2.7%	14.3%	3.6%	-0.3%	-2.6%	-0.2%	-1.5%	4.2%		
2009	000s	1.1	1.6	1.6	6.9	10.0	8.4	12.8	11.8	7.8	7.1	1.1	1.1	71.5	4.3	25.3	32.4	9.4		
2010	000s	1.7	2.1	3.0	7.8	10.6	10.9	10.8	11.2	8.5	7.6	2.3	1.5	78.0	9.0%	6.7	29.3	30.6	11.4	
2011	000s	0.7	1.4	1.2	8.5	9.1	8.8	10.9	10.1	7.3	6.4	1.3	0.9	66.8	-14.4%	3.3	26.4	28.3	8.7	
2012	000s	0.8	1.5	1.4	9.0	8.1	9.0	9.6	10.1	8.0	5.7	1.6	1.3	66.1	-1.0%	3.7	26.1	27.7	8.6	
2013	000s	0.5	1.1	2.6	8.6	8.1	8.9	10.9	11.1	6.9	5.8	1.3	1.1	66.9	1.2%	4.2	25.7	28.9	8.2	
2014	000s	0.7	1.8	1.5	8.3	9.5	8.7	10.4	12.1	6.6	6.7	1.3	1.5	69.2	3.5%	4.0	26.5	29.1	9.5	
2015	000s	0.6	1.4	1.8	7.1	8.7	8.4	9.7	11.7	7.6	7.7	1.7	1.8	68.1	-1.6%	3.8	24.2	29.0	11.1	
2016	000s	0.5	1.1	1.6	6.7	9.2	8.6	11.6	10.8	7.2	7.7	1.5	0.6	67.1	-1.4%	3.2	24.5	29.6	9.8	
2017	000s	0.4	1.0	1.1	7.8	8.9	8.2	11.5	9.7	6.3	8.6	2.2	1.3	67.2	0.1%	2.5	25.0	27.5	12.1	
2018	000s	0.4	0.9	1.6	8.4	9.3	8.0	11.8	10.2	6.2	9.4	2.9	1.7	71.0	5.7%	3.0	25.8	28.3	14.0	
2019	000s	0.6	1.0	1.6	8.1	8.9	7.9	11.4	10.1	6.2	9.1	2.7	1.5	69.2	-2.6%	3.2	24.9	27.7	13.3	

VISITOR NUMBERS												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Non-Serviced	000s	71.5	78.0	66.8	66.1	66.9	69.2	68.1	67.1	67.2	71.0	69.2
All Visitor Types	000s	629.5	637.0	629.4	643.7	700.8	690.6	702.3	750.4	806.2	797.9	804.2
Share of Total	%	11.4%	12.2%	10.6%	10.3%	9.5%	10.0%	9.7%	8.9%	8.3%	8.9%	8.6%
Annual Change in Share	%		7.8%	-13.3%	-3.2%	-7.0%	5.0%	-3.2%	-7.8%	-6.8%	6.8%	-3.3%
Change in Share from 2009	%		7.8%	-6.6%	-9.6%	-16.0%	-11.8%	-14.7%	-21.3%	-26.6%	-21.7%	-24.3%
Avg Ann. Change in Share	%		7.8%	-3.3%	-3.2%	-4.0%	-2.4%	-2.4%	-3.0%	-3.3%	-2.4%	-2.4%



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STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		SFR	VISITOR NUMBERS			
VISIT MORAY SPEYSIDE																			
VISITOR NUMBERS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER				
KEY		SFR																	
An increase of 3% or more		VISITOR NUMBERS IN THOUSANDS / PERCENTAGE CHANGES																	
Less than 3% change		Q1			Q2			Q3			Q4			TOTAL	% Change				
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4
% Change 2009 to 2019		-5.5%	4.8%	14.1%	18.3%	11.5%	12.3%	5.0%	8.4%	12.1%	14.0%	13.6%	10.2%	9.8%		3.0%	14.3%	8.6%	12.1%
% Change 2018 to 2019		-0.5%	-1.0%	-0.7%	0.0%	0.0%	-0.8%	-0.9%	-0.6%	-0.6%	-1.1%	-1.5%	-1.4%	-0.8%		-0.7%	-0.2%	-0.7%	-1.4%
Average Annual Change		-0.6%	0.5%	1.4%	1.8%	1.1%	1.2%	0.5%	0.8%	1.2%	1.4%	1.4%	1.0%	1.0%		0.3%	1.4%	0.9%	1.2%
2009	000s	9.9	5.9	6.7	10.3	8.6	8.8	7.4	13.9	8.4	8.1	7.6	14.1	109.6		22.4	27.7	29.7	29.8
2010	000s	9.5	5.8	7.6	10.8	8.8	9.4	7.2	13.8	8.6	8.3	7.3	14.6	111.8	2.0%	22.9	29.1	29.6	30.3
2011	000s	8.4	5.9	7.0	11.1	8.4	9.1	7.1	13.5	8.2	8.3	7.5	15.1	109.6	-2.0%	21.4	28.5	28.8	30.9
2012	000s	9.7	5.8	7.4	10.5	8.0	9.0	7.1	13.4	8.4	7.9	7.1	14.4	108.5	-1.0%	22.9	27.5	28.8	29.4
2013	000s	10.0	6.2	9.0	11.5	8.8	9.5	7.8	14.5	8.9	8.4	7.3	14.0	116.0	6.9%	25.2	29.9	31.3	29.7
2014	000s	9.8	6.4	7.4	11.5	9.5	9.8	7.8	15.0	9.0	8.7	7.8	15.5	118.1	1.8%	23.6	30.8	31.8	32.0
2015	000s	10.5	6.5	7.7	11.5	9.4	9.7	7.8	14.7	9.1	9.2	8.6	16.8	121.3	2.7%	24.6	30.6	31.5	34.5
2016	000s	8.9	5.8	7.8	11.4	9.4	10.0	8.1	15.3	9.1	9.1	7.7	16.0	118.6	-2.2%	22.5	30.8	32.4	32.8
2017	000s	10.1	6.2	7.6	12.3	9.6	10.2	8.0	15.2	9.2	9.2	8.4	15.7	121.8	2.7%	23.9	32.2	32.4	33.3
2018	000s	9.4	6.2	7.7	12.2	9.6	10.0	7.9	15.2	9.4	9.4	8.7	15.7	121.4	-0.3%	23.2	31.7	32.5	33.9
2019	000s	9.3	6.1	7.6	12.2	9.5	9.9	7.8	15.1	9.4	9.3	8.6	15.5	120.4	-0.8%	23.1	31.7	32.3	33.4

VISITOR NUMBERS												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
SFR	000s	109.6	111.8	109.6	108.5	116.0	118.1	121.3	118.6	121.8	121.4	120.4
All Visitor Types	000s	629.5	637.0	629.4	643.7	700.8	690.6	702.3	750.4	806.2	797.9	804.2
Share of Total	%	17.4%	17.6%	17.4%	16.9%	16.6%	17.1%	17.3%	15.8%	15.1%	15.2%	15.0%
Annual Change in Share	%		0.8%	-0.8%	-3.2%	-1.8%	3.3%	1.0%	-8.5%	-4.4%	0.7%	-1.5%
Change in Share from 2009	%		0.8%	0.0%	-3.2%	-4.9%	-1.8%	-0.8%	-9.3%	-13.3%	-12.7%	-14.0%
Avg Ann. Change in Share	%		0.8%	0.0%	-1.1%	-1.2%	-0.4%	-0.1%	-1.3%	-1.7%	-1.4%	-1.4%



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STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		STAYING VISITOR		VISITOR NUMBERS			
VISIT MORAY SPEYSIDE																				
VISITOR NUMBERS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		STAYING VISITOR																		
An increase of 3% or more		VISITOR NUMBERS IN THOUSANDS / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4		TOTAL	% Change						
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4	
% Change 2009 to 2019		-3.7%	0.0%	21.0%	28.4%	22.6%	33.8%	15.0%	39.7%	47.3%	25.1%	16.7%	17.1%	24.7%		5.6%	28.2%	33.4%	20.3%	
% Change 2018 to 2019		-3.4%	-2.7%	-5.8%	-2.0%	-3.2%	-1.4%	-1.5%	2.4%	-6.0%	-5.2%	1.4%	-0.7%	-2.2%		-4.1%	-2.2%	-1.5%	-2.1%	
Average Annual Change		-0.4%	0.0%	2.1%	2.8%	2.3%	3.4%	1.5%	4.0%	4.7%	2.5%	1.7%	1.7%	2.5%		0.6%	2.8%	3.3%	2.0%	
2009	000s	20.9	18.7	19.6	31.7	38.7	36.5	44.7	49.2	36.6	33.5	23.0	24.7	377.8		59.1	106.9	130.6	81.2	
2010	000s	19.4	17.5	24.8	34.6	42.2	41.6	42.7	50.0	39.3	33.5	19.7	22.7	388.2	2.7%	61.7	118.5	132.0	75.9	
2011	000s	15.9	20.0	21.0	35.8	37.5	38.6	42.6	49.0	36.0	35.0	22.7	27.3	381.3	-1.8%	56.9	111.8	127.6	84.9	
2012	000s	21.4	18.6	23.1	31.2	36.4	41.1	45.3	51.8	40.5	31.0	20.3	25.3	386.0	1.2%	63.1	108.7	137.5	76.6	
2013	000s	21.9	19.7	31.0	33.9	39.1	42.8	48.8	56.1	41.9	33.9	19.1	23.3	411.6	6.6%	72.6	115.9	146.8	76.3	
2014	000s	19.7	18.8	21.0	34.2	43.6	43.5	45.6	57.9	40.6	34.1	23.3	28.7	411.1	-0.1%	59.5	121.3	144.2	86.1	
2015	000s	22.0	20.5	22.4	32.9	43.8	40.9	45.4	55.7	39.9	41.3	30.1	32.8	427.7	4.0%	64.9	117.6	141.0	104.2	
2016	000s	16.7	16.1	25.3	34.2	45.5	44.6	54.3	62.9	47.3	39.2	23.9	33.0	442.9	3.6%	58.0	124.4	164.4	96.1	
2017	000s	24.5	19.5	25.7	42.2	49.8	52.8	56.7	62.9	50.5	42.8	27.2	30.9	485.4	9.6%	69.7	144.8	170.0	100.9	
2018	000s	20.8	19.2	25.1	41.5	49.0	49.5	52.2	67.2	57.4	44.2	26.5	29.2	481.8	-0.7%	65.1	140.1	176.8	99.8	
2019	000s	20.1	18.7	23.7	40.7	47.5	48.8	51.4	68.8	54.0	41.9	26.9	28.9	471.3	-2.2%	62.4	137.0	174.2	97.7	

VISITOR NUMBERS												
SHARE OF MARKET	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Staying Visitor	000s	377.8	388.2	381.3	386.0	411.6	411.1	427.7	442.9	485.4	481.8	471.3
All Visitor Types	000s	629.5	637.0	629.4	643.7	700.8	690.6	702.3	750.4	806.2	797.9	804.2
Share of Total	%	60.0%	60.9%	60.6%	60.0%	58.7%	59.5%	60.9%	59.0%	60.2%	60.4%	58.6%
Annual Change in Share	%		1.5%	-0.6%	-1.0%	-2.0%	1.3%	2.3%	-3.1%	2.0%	0.3%	-2.9%
Change in Share from 2009	%		1.5%	0.9%	-0.1%	-2.1%	-0.8%	1.5%	-1.6%	0.3%	0.6%	-2.3%
Avg Ann. Change in Share	%		1.5%	0.5%	0.0%	-0.5%	-0.2%	0.2%	-0.2%	0.0%	0.1%	-0.2%



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STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		DAY VISITOR		VISITOR NUMBERS			
VISIT MORAY SPEYSIDE																				
VISITOR NUMBERS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		DAY VISITOR																		
An increase of 3% or more		VISITOR NUMBERS IN THOUSANDS / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4		TOTAL	% Change						
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV			DEC	Q1	Q2	Q3	Q4	
% Change 2009 to 2019		27.1%	33.0%	-38.5%	29.8%	122.4%	28.9%	78.3%	0.6%	113.7%	14.7%	-46.5%	0.1%	32.2%	0.3%	70.6%	54.2%	-12.4%		
% Change 2018 to 2019		12.7%	20.1%	15.6%	7.0%	1.6%	5.4%	5.1%	6.6%	8.5%	5.9%	-43.0%	-0.5%	5.3%	16.4%	3.4%	6.1%	-13.2%		
Average Annual Change		2.7%	3.3%	-3.9%	3.0%	12.2%	2.9%	7.8%	0.1%	11.4%	1.5%	-4.6%	0.0%	3.2%	0.0%	7.1%	5.4%	-1.2%		
2009	000s	20.7	25.1	35.5	14.3	30.5	23.8	33.5	25.2	9.1	13.2	13.3	7.7	251.7	81.2	68.6	67.8	34.1		
2010	000s	20.4	24.5	34.7	15.1	31.4	25.4	30.4	23.0	8.5	13.7	13.8	8.0	248.8	-1.2%	79.5	71.9	61.8	35.6	
2011	000s	20.4	26.8	31.7	16.7	31.8	26.7	29.9	20.6	8.6	13.1	13.9	8.0	248.1	-0.3%	78.9	75.2	59.1	35.0	
2012	000s	20.7	30.8	34.1	15.5	34.0	28.0	31.1	19.7	8.8	12.8	12.3	10.1	257.7	3.9%	85.5	77.5	59.6	35.2	
2013	000s	23.6	35.8	39.0	15.1	42.4	27.1	37.3	23.1	11.2	13.9	12.0	8.7	289.2	12.2%	98.4	84.6	71.6	34.6	
2014	000s	21.6	30.3	29.5	16.6	45.5	26.8	40.0	23.6	10.5	14.5	11.6	9.2	279.5	-3.3%	81.3	88.8	74.1	35.3	
2015	000s	21.2	26.6	23.5	14.9	47.8	24.7	46.8	22.9	13.2	14.3	10.8	7.9	274.6	-1.8%	71.3	87.4	82.9	33.0	
2016	000s	22.2	29.2	25.6	15.0	56.8	28.8	52.0	24.3	16.8	15.4	12.2	9.0	307.5	12.0%	77.0	100.7	93.1	36.6	
2017	000s	25.3	30.3	20.0	17.6	63.0	28.7	59.9	23.8	18.0	14.5	12.3	7.5	320.8	4.3%	75.6	109.3	101.7	34.2	
2018	000s	23.3	27.8	18.9	17.3	66.7	29.2	56.8	23.7	18.0	14.2	12.5	7.8	316.1	-1.5%	70.0	113.2	98.5	34.5	
2019	000s	26.3	33.4	21.8	18.5	67.8	30.7	59.7	25.3	19.5	15.1	7.1	7.7	332.9	5.3%	81.5	117.0	104.5	29.9	

		VISITOR NUMBERS										
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Day Visitor	000s	251.7	248.8	248.1	257.7	289.2	279.5	274.6	307.5	320.8	316.1	332.9
All Visitor Types	000s	629.5	637.0	629.4	643.7	700.8	690.6	702.3	750.4	806.2	797.9	804.2
Share of Total	%	40.0%	39.1%	39.4%	40.0%	41.3%	40.5%	39.1%	41.0%	39.8%	39.6%	41.4%
Annual Change in Share	%		-2.3%	0.9%	1.6%	3.1%	-1.9%	-3.4%	4.8%	-2.9%	-0.4%	4.5%
Change in Share from 2009	%		-2.3%	-1.4%	0.1%	3.2%	1.2%	-2.2%	2.5%	-0.5%	-0.9%	3.5%
Avg Ann. Change in Share	%		-2.3%	-0.7%	0.0%	0.8%	0.2%	-0.4%	0.4%	-0.1%	-0.1%	0.4%



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Visitor Days by Month, Year and Visitor Type for the Period 2009 to 2019

Visitor Types: *Total*
Serviced Accommodation
Non-Serviced Accommodation
SFR
Staying Visitor
Day Visitor

STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		TOTAL	VISITOR DAYS			
VISIT MORAY SPEYSIDE																			
VISITOR DAYS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER				
KEY		TOTAL																	
An increase of 3% or more		VISITOR DAYS IN THOUSANDS / PERCENTAGE CHANGES																	
Less than 3% change		Q1			Q2			Q3			Q4			TOTAL	% Change				
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4
% Change 2009 to 2019		-7.2%	9.6%	-3.9%	26.3%	30.5%	15.1%	7.6%	4.1%	18.9%	17.8%	10.6%	12.0%	12.4%	Annual Change	-1.0%	23.7%	8.8%	14.0%
% Change 2018 to 2019		3.6%	6.3%	3.2%	1.6%	1.1%	0.2%	0.1%	0.1%	0.4%	-0.9%	-7.5%	-1.8%	0.4%		4.4%	0.9%	0.2%	-2.9%
Average Annual Change		-0.7%	1.0%	-0.4%	2.6%	3.0%	1.5%	0.8%	0.4%	1.9%	1.8%	1.1%	1.2%	1.2%		-0.1%	2.4%	0.9%	1.4%
2009	000s	91.9	78.3	91.3	130.2	170.3	172.0	231.2	262.4	147.7	127.3	79.6	96.4	1,678.5		261.5	472.5	641.3	303.2
2010	000s	87.7	76.8	106.8	144.2	182.0	198.8	214.7	254.0	156.4	135.3	76.1	102.2	1,735.1	3.4%	271.4	525.1	625.1	313.6
2011	000s	74.4	80.6	93.7	152.0	165.0	184.1	206.9	239.8	140.2	132.1	78.1	107.2	1,654.3	-4.7%	248.6	501.1	587.0	317.5
2012	000s	89.7	85.0	102.8	136.0	156.2	184.7	205.9	237.5	149.0	119.7	70.4	102.8	1,640.0	-0.9%	277.5	477.0	592.5	293.0
2013	000s	92.1	90.7	127.5	147.5	176.7	185.5	233.7	257.4	154.0	124.3	67.8	91.7	1,749.0	6.6%	310.4	509.7	645.1	283.9
2014	000s	84.3	86.1	89.4	141.3	195.6	186.2	223.7	264.2	149.1	128.9	76.7	108.5	1,734.1	-0.9%	259.8	523.1	637.1	314.1
2015	000s	90.6	82.2	88.2	138.8	190.7	180.9	226.4	249.1	153.8	142.7	88.5	119.6	1,751.6	1.0%	261.0	510.3	629.4	350.9
2016	000s	75.0	75.9	93.1	138.7	202.1	197.2	253.7	272.8	158.6	142.7	76.4	113.0	1,799.4	2.7%	244.0	538.1	685.1	332.1
2017	000s	91.6	82.9	84.8	163.1	215.1	204.7	258.5	267.5	164.0	144.8	87.9	109.4	1,874.5	4.2%	259.4	582.9	690.0	342.2
2018	000s	82.3	80.8	85.0	161.8	219.7	197.7	248.5	272.8	175.0	151.2	95.2	109.9	1,879.7	0.3%	248.0	579.2	696.2	356.3
2019	000s	85.2	85.8	87.7	164.4	222.2	198.0	248.9	273.2	175.6	149.9	88.0	107.9	1,886.9	0.4%	258.8	584.7	697.7	345.8

VISITOR DAYS												
SHARE OF MARKET	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Total	000s	1,678.5	1,735.1	1,654.3	1,640.0	1,749.0	1,734.1	1,751.6	1,799.4	1,874.5	1,879.7	1,886.9
All Visitor Types	M	1.7	1.7	1.7	1.6	1.7	1.7	1.8	1.8	1.9	1.9	1.9
Share of Total	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual Change in Share	%											
Change in Share from 2009	%											
Avg Ann. Change in Share	%											



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STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		SERVICED		VISITOR DAYS			
VISIT MORAY SPEYSIDE																				
VISITOR DAYS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		SERVICED ACCOMMODATION																		
An increase of 3% or more		VISITOR DAYS IN THOUSANDS / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4		TOTAL	% Change						
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV			DEC	Q1	Q2	Q3	Q4	
% Change 2009 to 2019		-19.8%	5.7%	30.6%	42.6%	40.4%	39.5%	12.1%	46.1%	70.8%	31.6%	-3.4%	31.6%	29.6%	4.6%	40.6%	41.0%	18.5%		
% Change 2018 to 2019		1.4%	-2.4%	-0.8%	1.5%	0.8%	0.4%	1.3%	0.7%	-0.6%	1.0%	-1.5%	-1.3%	0.2%	-0.8%	0.8%	0.4%	-0.3%		
Average Annual Change		-2.0%	0.6%	3.1%	4.3%	4.0%	3.9%	1.2%	4.6%	7.1%	3.2%	-0.3%	3.2%	3.0%	0.5%	4.1%	4.1%	1.8%		
2009	000s	24.3	22.7	21.7	28.1	37.8	37.7	48.0	47.0	38.5	35.0	31.4	17.4	389.6		68.8	103.7	133.4	83.8	
2010	000s	19.3	17.9	28.2	30.7	43.4	42.1	48.4	47.7	39.4	34.5	19.1	15.3	386.1	-0.9%	65.4	116.2	135.5	68.9	
2011	000s	14.0	24.1	27.0	30.2	36.0	39.1	44.7	45.5	38.3	40.9	26.6	23.5	390.0	1.0%	65.2	105.3	128.5	91.0	
2012	000s	25.5	25.0	32.8	34.2	33.8	42.3	50.5	49.5	42.9	35.1	21.5	18.8	411.9	5.6%	83.3	110.3	142.9	75.4	
2013	000s	26.5	26.6	40.6	34.2	37.1	44.3	56.7	54.3	45.8	37.2	19.9	14.2	437.5	6.2%	93.7	115.6	156.8	71.3	
2014	000s	19.4	21.9	24.8	31.6	42.9	45.5	49.8	54.8	43.7	35.2	26.1	21.0	416.7	-4.7%	66.1	120.0	148.3	82.3	
2015	000s	22.6	23.9	25.2	32.0	45.3	41.2	49.2	49.4	39.9	43.5	34.1	25.3	431.7	3.6%	71.7	118.5	138.5	103.0	
2016	000s	14.3	19.9	29.3	31.5	46.5	46.9	60.0	61.8	49.1	40.2	26.1	28.6	454.1	5.2%	63.4	124.8	170.9	95.0	
2017	000s	24.7	25.1	30.5	41.5	54.6	56.6	61.1	63.8	55.3	44.4	29.7	24.2	511.6	12.7%	80.3	152.7	180.3	98.3	
2018	000s	19.2	24.6	28.6	39.5	52.7	52.4	53.1	68.1	66.1	45.6	30.7	23.2	503.9	-1.5%	72.5	144.6	187.3	99.6	
2019	000s	19.5	24.0	28.4	40.1	53.1	52.6	53.8	68.6	65.7	46.0	30.3	22.9	505.1	0.2%	71.9	145.8	188.1	99.2	

VISITOR DAYS												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Serviced	000s	389.6	386.1	390.0	411.9	437.5	416.7	431.7	454.1	511.6	503.9	505.1
All Visitor Types	M	1.7	1.7	1.7	1.6	1.7	1.7	1.8	1.8	1.9	1.9	1.9
Share of Total	%	23.2%	22.3%	23.6%	25.1%	25.0%	24.0%	24.6%	25.2%	27.3%	26.8%	26.8%
Annual Change in Share	%		-4.1%	5.9%	6.5%	-0.4%	-3.9%	2.5%	2.4%	8.2%	-1.8%	-0.2%
Change in Share from 2009	%		-4.1%	1.6%	8.2%	7.8%	3.5%	6.2%	8.7%	17.6%	15.5%	15.3%
Avg Ann. Change in Share	%		-4.1%	0.8%	2.7%	1.9%	0.7%	1.0%	1.2%	2.2%	1.7%	1.5%



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STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		NON-SERVICED		VISITOR DAYS			
VISIT MORAY SPEYSIDE																				
VISITOR DAYS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		NON-SERVICED ACCOMMODATION																		
An increase of 3% or more		VISITOR DAYS IN THOUSANDS / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4		TOTAL	% Change						
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV			DEC	Q1	Q2	Q3	Q4	
% Change 2009 to 2019		-55.9%	-29.2%	2.4%	22.3%	-6.7%	-1.8%	-17.1%	-18.6%	-21.9%	11.1%	169.4%	-4.8%	-6.7%	-25.7%	2.7%	-18.8%	26.3%		
% Change 2018 to 2019		-2.8%	4.5%	1.9%	1.5%	1.7%	-1.6%	-3.2%	-1.3%	-0.5%	-3.9%	-4.4%	-7.8%	-1.3%	1.8%	0.4%	-1.8%	-4.4%		
Average Annual Change		-5.6%	-2.9%	0.2%	2.2%	-0.7%	-0.2%	-1.7%	-1.9%	-2.2%	1.1%	16.9%	-0.5%	-0.7%	-2.6%	0.3%	-1.9%	2.6%		
2009	000s	9.7	10.3	11.7	47.2	68.1	66.1	98.7	100.2	64.3	48.7	7.0	8.2	540.2		31.7	181.4	263.2	64.0	
2010	000s	12.1	14.4	18.4	55.9	72.2	83.9	86.4	94.4	71.7	55.8	16.1	13.7	595.1	10.2%	44.9	212.0	252.5	85.7	
2011	000s	8.1	9.4	11.3	61.6	64.0	72.8	83.5	86.5	58.2	47.2	10.1	8.2	520.8	-12.5%	28.8	198.3	228.1	65.5	
2012	000s	7.2	9.1	11.2	45.2	56.7	69.3	76.0	81.7	61.5	42.5	10.5	9.4	480.1	-7.8%	27.4	171.1	219.2	62.4	
2013	000s	4.2	6.8	17.8	52.9	62.2	66.2	86.2	86.0	58.9	41.7	9.0	6.2	498.2	3.8%	28.9	181.3	231.1	56.9	
2014	000s	6.4	11.7	10.4	48.1	69.6	64.8	80.7	88.8	56.4	46.6	10.3	8.9	502.6	0.9%	28.5	182.4	225.8	65.9	
2015	000s	7.4	9.3	13.6	46.7	60.5	66.0	77.4	81.9	61.7	50.5	12.0	11.4	498.4	-0.8%	30.4	173.3	220.9	73.9	
2016	000s	5.1	6.7	12.0	47.3	61.7	71.1	86.3	88.2	53.8	53.0	9.5	4.0	498.6	0.0%	23.8	180.1	228.2	66.5	
2017	000s	3.7	6.1	8.6	55.5	59.6	67.9	82.3	82.1	51.2	51.5	15.2	7.4	491.0	-1.5%	18.5	183.0	215.5	74.0	
2018	000s	4.4	7.0	11.7	56.9	62.5	66.0	84.6	82.7	50.5	56.3	19.7	8.5	510.8	4.0%	23.1	185.4	217.7	84.6	
2019	000s	4.3	7.3	12.0	57.8	63.5	64.9	81.9	81.6	50.2	54.1	18.9	7.8	504.3	-1.3%	23.5	186.2	213.7	80.8	

VISITOR DAYS												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Non-Serviced	000s	540.2	595.1	520.8	480.1	498.2	502.6	498.4	498.6	491.0	510.8	504.3
All Visitor Types	M	1.7	1.7	1.7	1.6	1.7	1.7	1.8	1.8	1.9	1.9	1.9
Share of Total	%	32.2%	34.3%	31.5%	29.3%	28.5%	29.0%	28.5%	27.7%	26.2%	27.2%	26.7%
Annual Change in Share	%		6.6%	-8.2%	-7.0%	-2.7%	1.7%	-1.8%	-2.6%	-5.5%	3.8%	-1.7%
Change in Share from 2009	%		6.6%	-2.2%	-9.0%	-11.5%	-9.9%	-11.6%	-13.9%	-18.6%	-15.6%	-17.0%
Avg Ann. Change in Share	%		6.6%	-1.1%	-3.0%	-2.9%	-2.0%	-1.9%	-2.0%	-2.3%	-1.7%	-1.7%



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STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		SFR		VISITOR DAYS			
VISIT MORAY SPEYSIDE																				
VISITOR DAYS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		SFR																		
An increase of 3% or more		VISITOR DAYS IN THOUSANDS / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4			TOTAL	% Change					
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4	
% Change 2009 to 2019		-5.5%	4.8%	14.1%	18.3%	11.5%	12.3%	5.0%	8.4%	12.1%	14.0%	13.6%	10.2%	9.6%	2.6%	14.1%	8.1%	11.9%		
% Change 2018 to 2019		-0.5%	-1.0%	-0.7%	0.0%	0.0%	-0.8%	-0.9%	-0.6%	-0.6%	-1.1%	-1.5%	-1.4%	-0.8%	-0.7%	-0.3%	-0.7%	-1.4%		
Average Annual Change		-0.6%	0.5%	1.4%	1.8%	1.1%	1.2%	0.5%	0.8%	1.2%	1.4%	1.4%	1.0%	1.0%	0.3%	1.4%	0.8%	1.2%		
2009	000s	37.2	20.2	22.4	40.6	33.9	44.3	51.0	90.1	35.9	30.4	28.0	63.0	497.0		79.8	118.9	176.9	121.4	
2010	000s	35.9	20.0	25.6	42.6	35.0	47.4	49.5	88.9	36.7	31.2	27.0	65.2	505.1	1.6%	81.5	125.0	175.2	123.4	
2011	000s	31.8	20.3	23.6	43.6	33.2	45.5	48.9	87.3	35.1	31.0	27.5	67.5	495.4	-1.9%	75.8	122.3	171.3	126.0	
2012	000s	36.4	20.0	24.8	41.1	31.9	45.2	48.4	86.6	35.8	29.4	26.1	64.5	490.2	-1.0%	81.3	118.2	170.8	120.0	
2013	000s	37.8	21.5	30.1	45.2	35.0	47.9	53.5	94.0	38.2	31.5	26.9	62.5	524.1	6.9%	89.4	128.2	185.6	121.0	
2014	000s	36.9	22.2	24.7	45.0	37.7	49.1	53.3	97.0	38.6	32.5	28.8	69.4	535.2	2.1%	83.9	131.9	188.9	130.6	
2015	000s	39.5	22.3	25.9	45.1	37.1	49.0	53.1	95.0	39.0	34.5	31.6	75.0	546.9	2.2%	87.7	131.1	187.1	141.0	
2016	000s	33.5	20.1	26.2	44.9	37.1	50.4	55.4	98.5	39.0	34.1	28.6	71.3	539.2	-1.4%	79.8	132.5	192.9	134.0	
2017	000s	38.0	21.4	25.6	48.5	38.0	51.5	55.1	97.9	39.5	34.5	30.8	70.4	551.1	2.2%	85.0	137.9	192.5	135.7	
2018	000s	35.3	21.4	25.7	48.0	37.8	50.2	54.0	98.2	40.4	35.1	32.3	70.4	548.9	-0.4%	82.4	136.0	192.7	137.7	
2019	000s	35.1	21.2	25.6	48.1	37.8	49.8	53.5	97.6	40.2	34.7	31.8	69.4	544.7	-0.8%	81.9	135.6	191.3	135.8	

VISITOR DAYS												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
SFR	000s	497.0	505.1	495.4	490.2	524.1	535.2	546.9	539.2	551.1	548.9	544.7
All Visitor Types	M	1.7	1.7	1.7	1.6	1.7	1.7	1.8	1.8	1.9	1.9	1.9
Share of Total	%	29.6%	29.1%	29.9%	29.9%	30.0%	30.9%	31.2%	30.0%	29.4%	29.2%	28.9%
Annual Change in Share	%		-1.7%	2.9%	-0.2%	0.2%	3.0%	1.2%	-4.0%	-1.9%	-0.7%	-1.1%
Change in Share from 2009	%		-1.7%	1.1%	1.0%	1.2%	4.3%	5.5%	1.2%	-0.7%	-1.4%	-2.5%
Avg Ann. Change in Share	%		-1.7%	0.6%	0.3%	0.3%	0.9%	0.9%	0.2%	-0.1%	-0.2%	-0.3%



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STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		STAYING VISITOR		VISITOR DAYS			
VISIT MORAY SPEYSIDE																				
VISITOR DAYS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		STAYING VISITOR																		
An increase of 3% or more		VISITOR DAYS IN THOUSANDS / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4			TOTAL	% Change					
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC							
% Change 2009 to 2019		-17.2%	-1.4%	18.1%	25.8%	10.5%	12.9%	-4.3%	4.5%	12.7%	18.1%	22.0%	13.0%	8.9%	Annual Change	-1.6%	15.8%	3.4%	17.4%	
% Change 2018 to 2019		0.0%	-0.9%	-0.3%	1.0%	0.9%	-0.8%	-1.3%	-0.5%	-0.5%	-1.6%	-2.2%	-1.9%	-0.6%		-0.4%	0.3%	-0.8%	-1.8%	
Average Annual Change		-1.7%	-0.1%	1.8%	2.6%	1.0%	1.3%	-0.4%	0.4%	1.3%	1.8%	2.2%	1.3%	0.9%		-0.2%	1.6%	0.3%	1.7%	
2009	000s	71.2	53.2	55.8	115.9	139.8	148.1	197.7	237.3	138.6	114.1	66.3	88.7	1,426.8		180.2	403.9	573.6	269.1	
2010	000s	67.4	52.3	72.2	129.1	150.7	173.4	184.3	231.0	147.9	121.6	62.3	94.2	1,486.2	4.2%	191.8	453.2	563.2	278.0	
2011	000s	53.9	53.8	62.0	135.3	133.2	157.4	177.1	219.3	131.6	119.1	64.2	99.2	1,406.1	-5.4%	169.8	425.9	527.9	282.5	
2012	000s	69.1	54.2	68.7	120.5	122.3	156.7	174.9	217.8	140.2	107.0	58.1	92.7	1,382.2	-1.7%	192.0	399.5	532.9	257.8	
2013	000s	68.5	54.9	88.6	132.4	134.3	158.4	196.4	234.2	142.8	110.4	55.8	83.0	1,459.8	5.6%	212.0	425.1	573.5	249.2	
2014	000s	62.7	55.8	59.9	124.7	150.2	159.4	183.8	240.6	138.7	114.3	65.1	99.3	1,454.6	-0.4%	178.5	434.3	563.0	278.8	
2015	000s	69.4	55.6	64.7	123.8	143.0	156.1	179.7	226.2	140.6	128.4	77.8	111.7	1,477.0	1.5%	189.7	422.9	546.5	317.9	
2016	000s	52.8	46.7	67.5	123.7	145.3	168.4	201.7	248.5	141.9	127.3	64.2	104.0	1,492.0	1.0%	167.0	437.4	592.0	295.5	
2017	000s	66.4	52.6	64.8	145.5	152.1	176.0	198.6	243.8	146.0	130.4	75.7	102.0	1,553.7	4.1%	183.8	473.6	588.3	308.0	
2018	000s	58.9	53.0	66.1	144.5	153.0	168.5	191.7	249.0	157.0	137.0	82.7	102.1	1,563.6	0.6%	178.0	466.0	597.8	321.8	
2019	000s	58.9	52.5	65.9	145.9	154.4	167.3	189.2	247.9	156.1	134.8	80.9	100.2	1,554.1	-0.6%	177.3	467.6	593.2	315.9	

VISITOR DAYS												
SHARE OF MARKET	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Staying Visitor	000s	1,426.8	1,486.2	1,406.1	1,382.2	1,459.8	1,454.6	1,477.0	1,492.0	1,553.7	1,563.6	1,554.1
All Visitor Types	M	1.7	1.7	1.7	1.6	1.7	1.7	1.8	1.8	1.9	1.9	1.9
Share of Total	%	85.0%	85.7%	85.0%	84.3%	83.5%	83.9%	84.3%	82.9%	82.9%	83.2%	82.4%
Annual Change in Share	%		0.8%	-0.8%	-0.8%	-1.0%	0.5%	0.5%	-1.7%	0.0%	0.4%	-1.0%
Change in Share from 2009	%		0.8%	0.0%	-0.8%	-1.8%	-1.3%	-0.8%	-2.5%	-2.5%	-2.1%	-3.1%
Avg Ann. Change in Share	%		0.8%	0.0%	-0.3%	-0.5%	-0.3%	-0.1%	-0.4%	-0.3%	-0.2%	-0.3%



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STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		DAY VISITOR		VISITOR DAYS			
VISIT MORAY SPEYSIDE																				
VISITOR DAYS BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		DAY VISITOR																		
An increase of 3% or more		VISITOR DAYS IN THOUSANDS / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4		TOTAL	% Change						
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV			DEC	Q1	Q2	Q3	Q4	
% Change 2009 to 2019		27.1%	33.0%	-38.5%	29.8%	122.4%	28.9%	78.3%	0.6%	113.7%	14.7%	-46.5%	0.1%	32.2%	0.3%	70.6%	54.2%	-12.4%		
% Change 2018 to 2019		12.7%	20.1%	15.6%	7.0%	1.6%	5.4%	5.1%	6.6%	8.5%	5.9%	-43.0%	-0.5%	5.3%	16.4%	3.4%	6.1%	-13.2%		
Average Annual Change		2.7%	3.3%	-3.9%	3.0%	12.2%	2.9%	7.8%	0.1%	11.4%	1.5%	-4.6%	0.0%	3.2%	0.0%	7.1%	5.4%	-1.2%		
2009	000s	20.7	25.1	35.5	14.3	30.5	23.8	33.5	25.2	9.1	13.2	13.3	7.7	251.7		81.2	68.6	67.8	34.1	
2010	000s	20.4	24.5	34.7	15.1	31.4	25.4	30.4	23.0	8.5	13.7	13.8	8.0	248.8	-1.2%	79.5	71.9	61.8	35.6	
2011	000s	20.4	26.8	31.7	16.7	31.8	26.7	29.9	20.6	8.6	13.1	13.9	8.0	248.1	-0.3%	78.9	75.2	59.1	35.0	
2012	000s	20.7	30.8	34.1	15.5	34.0	28.0	31.1	19.7	8.8	12.8	12.3	10.1	257.7	3.9%	85.5	77.5	59.6	35.2	
2013	000s	23.6	35.8	39.0	15.1	42.4	27.1	37.3	23.1	11.2	13.9	12.0	8.7	289.2	12.2%	98.4	84.6	71.6	34.6	
2014	000s	21.6	30.3	29.5	16.6	45.5	26.8	40.0	23.6	10.5	14.5	11.6	9.2	279.5	-3.3%	81.3	88.8	74.1	35.3	
2015	000s	21.2	26.6	23.5	14.9	47.8	24.7	46.8	22.9	13.2	14.3	10.8	7.9	274.6	-1.8%	71.3	87.4	82.9	33.0	
2016	000s	22.2	29.2	25.6	15.0	56.8	28.8	52.0	24.3	16.8	15.4	12.2	9.0	307.5	12.0%	77.0	100.7	93.1	36.6	
2017	000s	25.3	30.3	20.0	17.6	63.0	28.7	59.9	23.8	18.0	14.5	12.3	7.5	320.8	4.3%	75.6	109.3	101.7	34.2	
2018	000s	23.3	27.8	18.9	17.3	66.7	29.2	56.8	23.7	18.0	14.2	12.5	7.8	316.1	-1.5%	70.0	113.2	98.5	34.5	
2019	000s	26.3	33.4	21.8	18.5	67.8	30.7	59.7	25.3	19.5	15.1	7.1	7.7	332.9	5.3%	81.5	117.0	104.5	29.9	

VISITOR DAYS												
SHARE OF MARKET	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Day Visitor	000s	251.7	248.8	248.1	257.7	289.2	279.5	274.6	307.5	320.8	316.1	332.9
All Visitor Types	M	1.7	1.7	1.7	1.6	1.7	1.7	1.8	1.8	1.9	1.9	1.9
Share of Total	%	15.0%	14.3%	15.0%	15.7%	16.5%	16.1%	15.7%	17.1%	17.1%	16.8%	17.6%
Annual Change in Share	%		-4.4%	4.6%	4.8%	5.2%	-2.5%	-2.7%	9.0%	0.2%	-1.7%	4.9%
Change in Share from 2009	%		-4.4%	0.0%	4.8%	10.3%	7.5%	4.5%	13.9%	14.1%	12.1%	17.6%
Avg Ann. Change in Share	%		-4.4%	0.0%	1.6%	2.6%	1.5%	0.8%	2.0%	1.8%	1.3%	1.8%



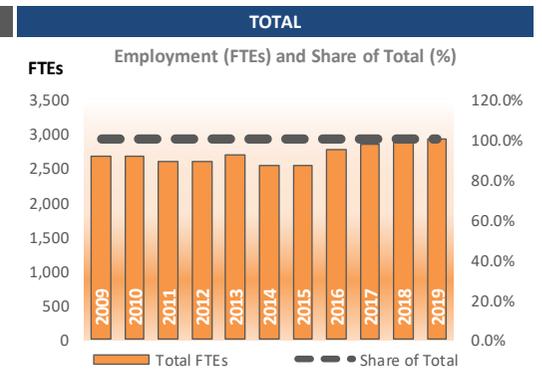
Note: This report caters for a period of up to 12 years. Parts of this page are intentionally left blank to accommodate new data as it becomes available.

Direct and Total Employment by Month, Year and Visitor Type for the Period 2009 to 2019

Visitor Types: *Total*
Serviced Accommodation
Non-Serviced Accommodation
SFR
Staying Visitor
Day Visitor

STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		TOTAL		TOTAL EMPLOYMENT				
VISIT MORAY SPEYSIDE																					
EMPLOYMENT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER						
KEY		TOTAL																			
An increase of 3% or more		TOTAL EMPLOYMENT IN FULL TIME EQUIVALENTS (FTEs) / PERCENTAGE CHANGES																			
Less than 3% change		Q1			Q2			Q3			Q4		TOTAL		% Change						
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC					Q1	Q2	Q3	Q4
% Change 2009 to 2019		-4.9%	5.1%	0.5%	11.9%	18.2%	11.6%	6.1%	10.6%	29.1%	9.9%	-0.5%	4.6%	9.0%			0.1%	14.0%	14.1%	5.0%	
% Change 2018 to 2019		2.2%	2.9%	2.0%	1.5%	1.0%	0.7%	1.1%	0.6%	0.3%	0.6%	-2.9%	-0.2%	0.8%			2.3%	1.0%	0.6%	-0.7%	
Average Annual Change		-0.5%	0.5%	0.1%	1.2%	1.8%	1.2%	0.6%	1.1%	2.9%	1.0%	0.0%	0.5%	0.9%			0.0%	1.4%	1.4%	0.5%	
2009	FTEs	2,450	2,318	2,459	2,518	2,902	2,881	3,446	3,581	2,669	2,608	2,169	2,054	2,671			2,409	2,767	3,232	2,277	
2010	FTEs	2,328	2,225	2,703	2,633	2,998	3,131	3,279	3,397	2,693	2,635	2,024	2,005	2,671	0.0%		2,419	2,921	3,123	2,221	
2011	FTEs	2,135	2,303	2,495	2,680	2,774	2,929	3,125	3,223	2,522	2,574	2,079	2,092	2,578	-3.5%		2,311	2,795	2,957	2,248	
2012	FTEs	2,414	2,364	2,595	2,513	2,660	2,933	3,229	3,226	2,601	2,439	1,991	2,078	2,587	0.4%		2,458	2,702	3,019	2,169	
2013	FTEs	2,434	2,434	2,832	2,586	2,812	2,923	3,603	3,477	2,636	2,485	1,959	1,983	2,680	3.6%		2,567	2,774	3,239	2,142	
2014	FTEs	2,127	2,220	2,331	2,401	2,927	2,842	3,196	3,354	2,529	2,428	1,917	2,023	2,525	-5.8%		2,226	2,724	3,026	2,122	
2015	FTEs	2,214	2,211	2,304	2,404	2,930	2,795	3,222	3,202	2,520	2,516	1,949	2,050	2,526	0.1%		2,243	2,710	2,981	2,172	
2016	FTEs	2,149	2,295	2,532	2,546	3,208	3,183	3,768	3,710	2,844	2,750	2,052	2,193	2,769	9.6%		2,325	2,979	3,441	2,332	
2017	FTEs	2,454	2,424	2,462	2,771	3,351	3,220	3,787	3,697	2,913	2,764	2,162	2,145	2,846	2.8%		2,446	3,114	3,466	2,357	
2018	FTEs	2,281	2,368	2,424	2,774	3,397	3,193	3,619	3,939	3,435	2,850	2,223	2,152	2,888	1.5%		2,358	3,121	3,664	2,408	
2019	FTEs	2,330	2,436	2,471	2,817	3,430	3,214	3,657	3,961	3,445	2,866	2,159	2,148	2,911	0.8%		2,412	3,154	3,688	2,391	

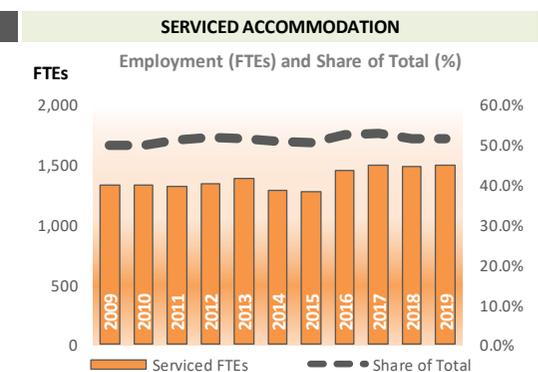
EMPLOYMENT												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total	FTEs	2,671	2,671	2,578	2,587	2,680	2,525	2,526	2,769	2,846	2,888	2,911
Total Employment	FTEs	2,671	2,671	2,578	2,587	2,680	2,525	2,526	2,769	2,846	2,888	2,911
Share of Total	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual Change in Share	%											
Change in Share from 2009	%											
Avg Ann. Change in Share	%											



Note: This report caters for a period of up to 12 years. Parts of this page are intentionally left blank to accommodate new data as it becomes available.

STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		SERVICED		DIRECT EMPLOYMENT			
VISIT MORAY SPEYSIDE																				
EMPLOYMENT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		SERVICED ACCOMMODATION																		
An increase of 3% or more		DIRECT EMPLOYMENT IN FULL TIME EQUIVALENTS (FTEs) / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4		TOTAL	% Change						
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV			DEC	Q1	Q2	Q3	Q4	
% Change 2009 to 2019		-6.2%	3.0%	10.2%	9.0%	13.9%	16.2%	5.0%	30.9%	44.0%	11.1%	-0.7%	5.8%	12.2%	2.2%	13.1%	26.3%	5.5%		
% Change 2018 to 2019		1.1%	0.2%	0.8%	1.4%	0.9%	0.9%	1.3%	0.5%	-0.2%	1.1%	0.6%	0.5%	0.7%	0.7%	1.1%	0.5%	0.8%		
Average Annual Change		-0.6%	0.3%	1.0%	0.9%	1.4%	1.6%	0.5%	3.1%	4.4%	1.1%	-0.1%	0.6%	1.2%	0.2%	1.3%	2.6%	0.5%		
2009	FTEs	1,357	1,313	1,295	1,240	1,315	1,293	1,483	1,456	1,396	1,340	1,308	1,144	1,329	1,322	1,283	1,445	1,264		
2010	FTEs	1,281	1,247	1,450	1,280	1,378	1,369	1,482	1,452	1,384	1,327	1,169	1,079	1,325	1,326	1,342	1,439	1,192		
2011	FTEs	1,194	1,318	1,383	1,279	1,287	1,316	1,426	1,427	1,358	1,358	1,250	1,175	1,314	1,298	1,294	1,404	1,261		
2012	FTEs	1,374	1,329	1,426	1,263	1,234	1,329	1,560	1,459	1,393	1,301	1,206	1,155	1,336	1,376	1,275	1,471	1,220		
2013	FTEs	1,368	1,338	1,502	1,279	1,259	1,335	1,762	1,602	1,414	1,322	1,192	1,123	1,375	1,403	1,291	1,593	1,212		
2014	FTEs	1,178	1,230	1,301	1,174	1,306	1,310	1,422	1,471	1,373	1,273	1,169	1,130	1,278	1,237	1,263	1,422	1,191		
2015	FTEs	1,222	1,258	1,310	1,181	1,323	1,276	1,400	1,400	1,311	1,293	1,169	1,121	1,272	1,263	1,260	1,370	1,194		
2016	FTEs	1,232	1,344	1,482	1,302	1,480	1,514	1,726	1,729	1,563	1,461	1,282	1,285	1,450	1,263	1,260	1,370	1,194		
2017	FTEs	1,409	1,424	1,498	1,389	1,540	1,552	1,685	1,744	1,617	1,494	1,328	1,257	1,495	1,444	1,494	1,682	1,360		
2018	FTEs	1,258	1,349	1,415	1,333	1,486	1,489	1,538	1,898	2,015	1,473	1,291	1,204	1,479	1,341	1,436	1,817	1,323		
2019	FTEs	1,272	1,352	1,427	1,352	1,499	1,503	1,558	1,907	2,011	1,490	1,299	1,211	1,490	1,351	1,451	1,825	1,333		

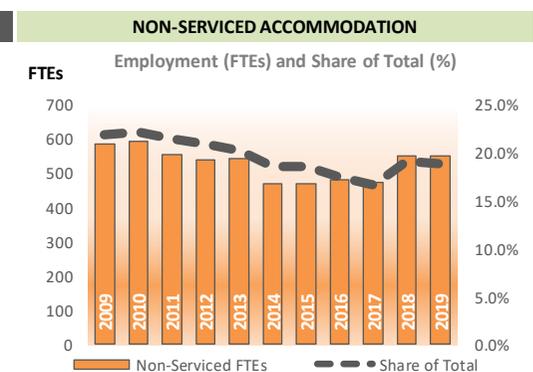
EMPLOYMENT												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Serviced	FTEs	1,329	1,325	1,314	1,336	1,375	1,278	1,272	1,450	1,495	1,479	1,490
Total Employment	FTEs	2,671	2,671	2,578	2,587	2,680	2,525	2,526	2,769	2,846	2,888	2,911
Share of Total	%	49.7%	49.6%	51.0%	51.6%	51.3%	50.6%	50.3%	52.4%	52.5%	51.2%	51.2%
Annual Change in Share	%		-0.3%	2.8%	1.3%	-0.7%	-1.3%	-0.6%	4.0%	0.3%	-2.5%	-0.1%
Change in Share from 2009	%		-0.3%	2.5%	3.8%	3.1%	1.8%	1.2%	5.3%	5.6%	3.0%	2.9%
Avg Ann. Change in Share	%		-0.3%	1.3%	1.3%	0.8%	0.4%	0.2%	0.8%	0.7%	0.3%	0.3%



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STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		NON-SERVICED		DIRECT EMPLOYMENT			
VISIT MORAY SPEYSIDE																				
EMPLOYMENT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		NON-SERVICED ACCOMMODATION																		
An increase of 3% or more		DIRECT EMPLOYMENT IN FULL TIME EQUIVALENTS (FTEs) / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4		TOTAL	% Change						
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV			DEC	Q1	Q2	Q3	Q4	
% Change 2009 to 2019		-8.1%	-6.5%	-3.3%	4.8%	-4.5%	-3.8%	-13.0%	-19.8%	-8.4%	0.8%	8.8%	-3.5%	-6.0%	-5.9%	-1.5%	-14.3%	1.8%		
% Change 2018 to 2019		-0.1%	0.3%	0.2%	1.1%	0.6%	-0.5%	-1.3%	-0.6%	0.0%	-1.3%	-0.8%	-0.7%	-0.3%	0.1%	0.4%	-0.7%	-1.0%		
Average Annual Change		-0.8%	-0.7%	-0.3%	0.5%	-0.4%	-0.4%	-1.3%	-2.0%	-0.8%	0.1%	0.9%	-0.4%	-0.6%	-0.6%	-0.2%	-1.4%	0.2%		
2009	FTEs	377	375	391	601	725	720	829	903	660	637	377	380	581		381	682	797	465	
2010	FTEs	383	386	410	632	725	803	764	803	699	665	412	401	590	1.6%	393	720	755	492	
2011	FTEs	361	361	378	664	683	729	736	741	618	605	376	369	552	-6.5%	367	692	699	450	
2012	FTEs	360	362	379	584	654	715	704	727	636	579	380	375	538	-2.5%	367	651	689	445	
2013	FTEs	352	355	398	597	669	697	744	740	615	578	374	364	540	0.4%	369	654	700	438	
2014	FTEs	286	297	307	508	613	606	642	671	539	522	313	306	467	-13.5%	297	575	618	380	
2015	FTEs	289	290	316	507	583	611	624	643	562	545	319	315	467	-0.1%	298	567	610	393	
2016	FTEs	289	289	318	518	600	647	676	688	554	571	316	294	480	2.8%	298	588	639	394	
2017	FTEs	283	285	305	542	599	618	644	654	535	544	333	302	470	-2.0%	291	587	611	393	
2018	FTEs	346	349	378	623	688	696	731	729	604	650	414	369	548	16.5%	358	669	688	478	
2019	FTEs	346	350	378	630	693	693	722	725	604	642	411	367	547	-0.3%	358	672	683	473	

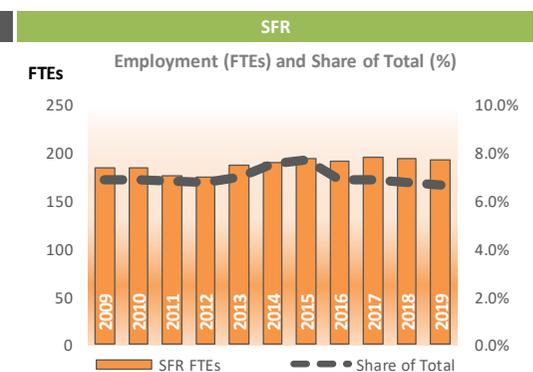
EMPLOYMENT												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Non-Serviced	FTEs	581	590	552	538	540	467	467	480	470	548	547
Total Employment	FTEs	2,671	2,671	2,578	2,587	2,680	2,525	2,526	2,769	2,846	2,888	2,911
Share of Total	%	21.8%	22.1%	21.4%	20.8%	20.2%	18.5%	18.5%	17.3%	16.5%	19.0%	18.8%
Annual Change in Share	%		1.6%	-3.1%	-2.8%	-3.1%	-8.1%	-0.2%	-6.2%	-4.6%	14.8%	-1.1%
Change in Share from 2009	%		1.6%	-1.6%	-4.4%	-7.4%	-14.9%	-15.0%	-20.3%	-24.0%	-12.8%	-13.7%
Avg Ann. Change in Share	%		1.6%	-0.8%	-1.5%	-1.8%	-3.0%	-2.5%	-2.9%	-3.0%	-1.4%	-1.4%



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STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		SFR	DIRECT EMPLOYMENT			
VISIT MORAY SPEYSIDE																			
EMPLOYMENT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER				
KEY		SFR																	
An increase of 3% or more		DIRECT EMPLOYMENT IN FULL TIME EQUIVALENTS (FTEs) / PERCENTAGE CHANGES																	
Less than 3% change		Q1			Q2			Q3			Q4		TOTAL	% Change					
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4
% Change 2009 to 2019		-9.4%	0.5%	9.3%	13.4%	6.8%	7.6%	0.6%	3.8%	7.4%	9.3%	8.9%	5.6%	5.0%		-1.7%	9.4%	3.6%	7.3%
% Change 2018 to 2019		-0.5%	-1.0%	-0.7%	0.0%	0.0%	-0.8%	-0.9%	-0.6%	-0.6%	-1.1%	-1.5%	-1.4%	-0.7%		-0.7%	-0.3%	-0.7%	-1.4%
Average Annual Change		-0.9%	0.0%	0.9%	1.3%	0.7%	0.8%	0.1%	0.4%	0.7%	0.9%	0.9%	0.6%	0.5%		-0.2%	0.9%	0.4%	0.7%
2009	FTEs	210	114	127	226	189	247	178	314	125	117	108	243	183		150	221	206	156
2010	FTEs	199	110	141	232	191	258	169	304	125	118	102	246	183	-0.1%	150	227	199	155
2011	FTEs	172	110	128	233	177	243	163	292	117	115	102	249	175	-4.3%	137	218	191	155
2012	FTEs	197	108	134	219	170	241	162	289	120	109	97	238	174	-0.8%	147	210	190	148
2013	FTEs	205	116	163	241	187	256	179	314	128	116	100	231	186	7.2%	161	228	207	149
2014	FTEs	200	120	134	240	201	262	178	324	129	120	106	256	189	1.6%	151	235	210	161
2015	FTEs	214	121	140	241	198	261	177	317	130	127	117	277	193	2.2%	158	233	208	174
2016	FTEs	181	109	142	240	198	269	185	329	130	126	106	263	190	-1.8%	144	236	215	165
2017	FTEs	205	116	139	259	203	275	184	327	132	127	114	260	195	2.7%	153	245	214	167
2018	FTEs	191	116	139	256	202	268	181	328	135	130	119	260	194	-0.7%	149	242	215	170
2019	FTEs	190	115	138	256	202	266	179	326	134	128	117	256	192	-0.7%	148	241	213	167

EMPLOYMENT											
SHARE OF MARKET	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
SFR FTEs	183	183	175	174	186	189	193	190	195	194	192
Total Employment FTEs	2,671	2,671	2,578	2,587	2,680	2,525	2,526	2,769	2,846	2,888	2,911
Share of Total %	6.9%	6.8%	6.8%	6.7%	6.9%	7.5%	7.7%	6.9%	6.9%	6.7%	6.6%
Annual Change in Share %		-0.1%	-0.8%	-1.1%	3.5%	7.9%	2.1%	-10.4%	-0.1%	-2.1%	-1.5%
Change in Share from 2009 %		-0.1%	-0.9%	-2.0%	1.4%	9.4%	11.7%	0.0%	0.0%	-2.1%	-3.6%
Avg Ann. Change in Share %		-0.1%	-0.5%	-0.7%	0.3%	1.9%	1.9%	0.0%	0.0%	-0.2%	-0.4%



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STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		STAYING VISITOR		DIRECT EMPLOYMENT			
VISIT MORAY SPEYSIDE																				
EMPLOYMENT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		STAYING VISITOR																		
An increase of 3% or more		DIRECT EMPLOYMENT IN FULL TIME EQUIVALENTS (FTEs) / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4		TOTAL	% Change						
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV			DEC	Q1	Q2	Q3	Q4	
% Change 2009 to 2019		-7.0%	0.9%	7.2%	8.2%	7.3%	8.9%	-1.3%	10.6%	26.1%	7.9%	1.9%	3.8%	6.5%	0.2%	8.2%	11.2%	4.7%		
% Change 2018 to 2019		0.7%	0.2%	0.6%	1.1%	0.7%	0.4%	0.4%	0.1%	-0.2%	0.3%	0.1%	0.0%	0.4%	0.5%	0.7%	0.1%	0.2%		
Average Annual Change		-0.7%	0.1%	0.7%	0.8%	0.7%	0.9%	-0.1%	1.1%	2.6%	0.8%	0.2%	0.4%	0.7%	0.0%	0.8%	1.1%	0.5%		
2009	FTEs	1,944	1,802	1,812	2,067	2,230	2,260	2,490	2,674	2,181	2,094	1,793	1,767	2,093		1,853	2,186	2,448	1,885	
2010	FTEs	1,863	1,743	2,002	2,144	2,294	2,430	2,415	2,558	2,209	2,110	1,683	1,726	2,098	0.2%	1,869	2,289	2,394	1,840	
2011	FTEs	1,728	1,788	1,889	2,175	2,147	2,288	2,326	2,460	2,093	2,078	1,728	1,793	2,041	-2.7%	1,802	2,204	2,293	1,866	
2012	FTEs	1,932	1,799	1,940	2,067	2,058	2,285	2,426	2,476	2,149	1,989	1,682	1,768	2,047	0.3%	1,890	2,137	2,350	1,813	
2013	FTEs	1,924	1,809	2,064	2,117	2,114	2,288	2,685	2,656	2,157	2,016	1,665	1,718	2,101	2.6%	1,932	2,173	2,499	1,800	
2014	FTEs	1,664	1,647	1,742	1,922	2,120	2,178	2,243	2,467	2,041	1,915	1,588	1,692	1,935	-7.9%	1,685	2,073	2,250	1,732	
2015	FTEs	1,725	1,669	1,766	1,929	2,104	2,149	2,201	2,361	2,003	1,965	1,605	1,713	1,932	-0.1%	1,720	2,060	2,188	1,761	
2016	FTEs	1,702	1,741	1,941	2,059	2,278	2,431	2,586	2,747	2,247	2,158	1,704	1,842	2,120	9.7%	1,795	2,256	2,527	1,901	
2017	FTEs	1,897	1,825	1,941	2,190	2,342	2,445	2,514	2,725	2,284	2,166	1,775	1,819	2,160	1.9%	1,888	2,326	2,508	1,920	
2018	FTEs	1,796	1,814	1,932	2,212	2,376	2,452	2,449	2,955	2,754	2,252	1,824	1,834	2,221	2.8%	1,848	2,347	2,719	1,970	
2019	FTEs	1,809	1,817	1,944	2,238	2,393	2,461	2,458	2,957	2,750	2,260	1,827	1,834	2,229	0.4%	1,857	2,364	2,722	1,974	

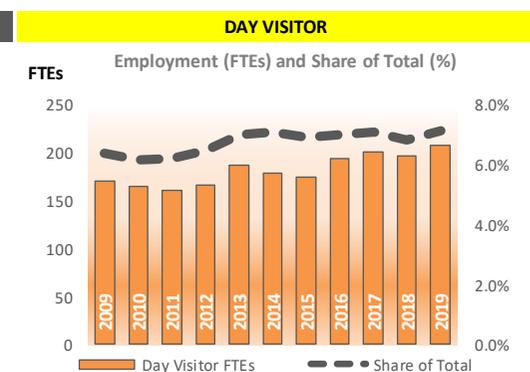
EMPLOYMENT												
SHARE OF MARKET	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Staying Visitor FTEs	2,502	2,507	2,418	2,421	2,494	2,347	2,353	2,576	2,646	2,692	2,704	
Total Employment FTEs	2,671	2,671	2,578	2,587	2,680	2,525	2,526	2,769	2,846	2,888	2,911	
Share of Total %	93.6%	93.9%	93.8%	93.6%	93.0%	93.0%	93.1%	93.0%	93.0%	93.2%	92.9%	
Annual Change in Share %		0.2%	-0.1%	-0.2%	-0.6%	-0.1%	0.2%	-0.1%	-0.1%	0.3%	-0.3%	
Change in Share from 2009 %		0.2%	0.2%	-0.1%	-0.6%	-0.7%	-0.5%	-0.7%	-0.7%	-0.5%	-0.8%	
Avg Ann. Change in Share %		0.2%	0.1%	0.0%	-0.2%	-0.1%	-0.1%	-0.1%	-0.1%	-0.1%	-0.1%	



Note: This report caters for a period of up to 12 years. Parts of this page are intentionally left blank to accommodate new data as it becomes available.

STEAM FINAL TREND REPORT FOR 2009-2019													2009 to 2019		DAY VISITOR		DIRECT EMPLOYMENT			
VISIT MORAY SPEYSIDE																				
EMPLOYMENT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		DAY VISITOR																		
An increase of 3% or more		DIRECT EMPLOYMENT IN FULL TIME EQUIVALENTS (FTEs) / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4		TOTAL	% Change	QUARTER					
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV			DEC	Q1	Q2	Q3	Q4	
% Change 2009 to 2019		21.8%	27.5%	-41.1%	24.4%	113.1%	23.5%	70.8%	-3.6%	104.8%	9.9%	-48.7%	-4.1%	22.0%	-3.9%	63.5%	47.8%	-16.0%		
% Change 2018 to 2019		12.7%	20.1%	15.6%	7.0%	1.6%	5.4%	5.1%	6.6%	8.5%	5.9%	-43.0%	-0.5%	5.5%	16.4%	3.4%	6.1%	-13.2%		
Average Annual Change		2.2%	2.7%	-4.1%	2.4%	11.3%	2.4%	7.1%	-0.4%	10.5%	1.0%	-4.9%	-0.4%	2.2%	-0.4%	6.4%	4.8%	-1.6%		
2009	FTEs	193	234	331	92	197	154	257	193	70	123	124	72	170	252	148	173	106		
2010	FTEs	186	224	316	95	198	160	228	172	64	125	126	73	164	-3.4%	242	151	155	108	
2011	FTEs	183	239	283	103	197	165	219	151	63	117	124	72	160	-2.6%	235	155	145	104	
2012	FTEs	184	275	304	96	210	173	228	145	64	114	110	91	166	4.1%	255	160	146	105	
2013	FTEs	211	320	348	93	262	168	274	170	82	124	107	78	186	12.1%	293	174	175	103	
2014	FTEs	192	271	263	102	281	166	294	174	77	130	103	82	178	-4.5%	242	183	181	105	
2015	FTEs	189	238	210	92	295	153	344	168	97	128	96	71	173	-2.5%	212	180	203	98	
2016	FTEs	198	261	229	93	351	178	382	179	123	138	109	81	193	11.6%	229	207	228	109	
2017	FTEs	226	270	179	109	389	178	440	175	132	129	110	67	200	3.5%	225	225	249	102	
2018	FTEs	208	248	169	107	412	180	417	174	132	127	111	69	196	-2.0%	208	233	241	103	
2019	FTEs	235	298	195	115	419	190	438	186	143	135	63	69	207	5.5%	243	241	256	89	

EMPLOYMENT												
SHARE OF MARKET	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Day Visitor	FTEs	170	164	160	166	186	178	173	193	200	196	207
Total Employment	FTEs	2,671	2,671	2,578	2,587	2,680	2,525	2,526	2,769	2,846	2,888	2,911
Share of Total	%	6.4%	6.1%	6.2%	6.4%	7.0%	7.0%	6.9%	7.0%	7.0%	6.8%	7.1%
Annual Change in Share	%		-3.4%	0.9%	3.7%	8.2%	1.3%	-2.6%	1.8%	0.7%	-3.4%	4.7%
Change in Share from 2009	%		-3.4%	-2.5%	1.1%	9.4%	10.9%	8.0%	10.0%	10.7%	7.0%	12.0%
Avg Ann. Change in Share	%		-3.4%	-1.3%	0.4%	2.4%	2.2%	1.3%	1.4%	1.3%	0.8%	1.2%



Note: This report caters for a period of up to 12 years. Parts of this page are intentionally left blank to accommodate new data as it becomes available.

STEAM FINAL TREND REPORT FOR 2009-2019
VISIT MORAY SPEYSIDE

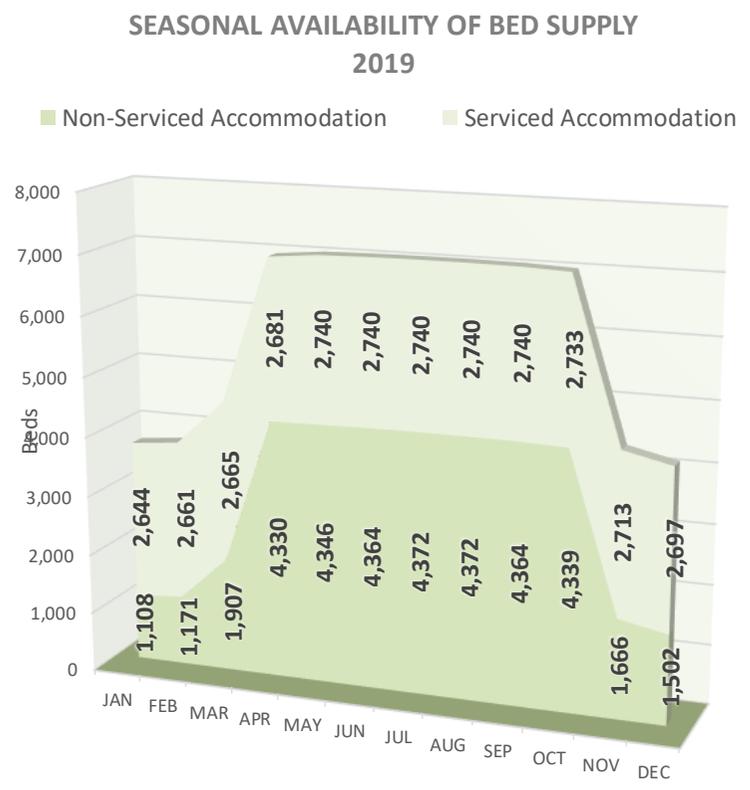
2019 **STAYING VISITORS** **ACCOMMODATION SUPPLY DISTRIBUTION BY TYPE**

SERVICED ACCOMMODATION 2019	2019		Change on 2018		Change on 2009	
	Est.	Beds	Est.	Beds	Est.	Beds
Serviced Accommodation Total	179	2,740	+1	+18	-29	+107
+50 Room	3	453	0	0	+1	+234
26-50 Room	3	226	0	0	-1	-43
<26 Room	76	1,223	+1	+18	-1	+16
Guest Houses/B&Bs	97	838	0	0	-28	-100

NON-SERVICED ACCOMMODATION 2019	2019		Change on 2018		Change on 2009	
	Est.	Beds	Est.	Beds	Est.	Beds
Non-Serviced Accommodation Total	194	4,372	0	+12	-7	+138
Self-Catering	174	2,173	0	+12	-9	+135
Touring/Camping	20	2,199	0	0	+2	+3

DISTRIBUTION BY TYPE OF ACCOMMODATION 2019	2019		Change on 2018		Change on 2009	
	Est.	Beds	Est.	Beds	Est.	Beds
All Paid Accommodation Total	373	7,112	+1	+30	-36	+245
Serviced Accommodation Share of Total	48%	39%				
Non-Serviced Accommodation Share of Total	52%	61%				

SEASONAL AVAILABILITY OF BED SUPPLY 2019	2019											
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
All Paid Accommodation Total	3,752	3,832	4,572	7,011	7,086	7,104	7,112	7,112	7,104	7,072	4,379	4,199
Serviced Accommodation	2,644	2,661	2,665	2,681	2,740	2,740	2,740	2,740	2,740	2,733	2,713	2,697
Non-Serviced Accommodation	1,108	1,171	1,907	4,330	4,346	4,364	4,372	4,372	4,364	4,339	1,666	1,502



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Report Prepared by: Alison Tipler, Date of Issue: 12/05/20

Report Sections With Historic Financial Data Indexed to 2019 Prices

Sections:	<i>Comparative Headlines</i>	Visitor Types:	<i>Total</i>
	<i>Key Measures</i>		<i>Serviced Accommodation</i>
	<i>Economic Impact</i>		<i>Non-Serviced Accommodation</i>
	<i>Sectoral Analysis</i>		<i>SFR</i>
			<i>Staying Visitor</i>
			<i>Day Visitor</i>

Indexation: *Indexation to: 2019*

2009	<i>1.35</i>
2010	<i>1.30</i>
2011	<i>1.24</i>
2012	<i>1.19</i>
2013	<i>1.15</i>
2014	<i>1.12</i>
2015	<i>1.11</i>
2016	<i>1.09</i>
2017	<i>1.07</i>
2018	<i>1.03</i>
2019	<i>1.00</i>

STEAM FINAL TREND REPORT FOR 2009-2019
VISIT MORAY SPEYSIDE

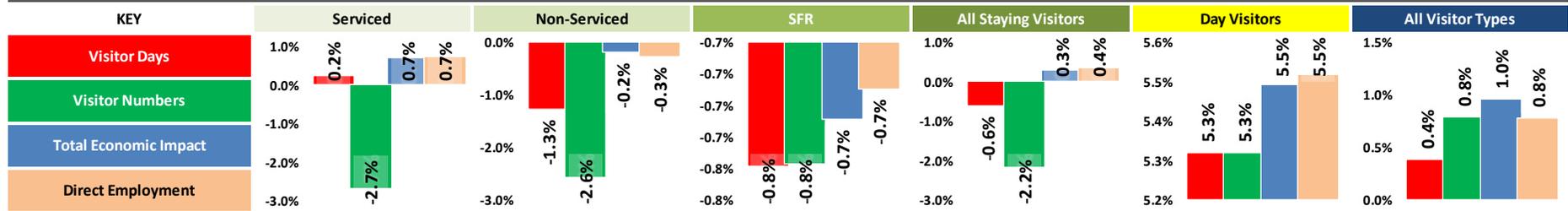
Comparing 2019 and 2018
 2018 in 2019 prices (1.025)

COMPARATIVE HEADLINES

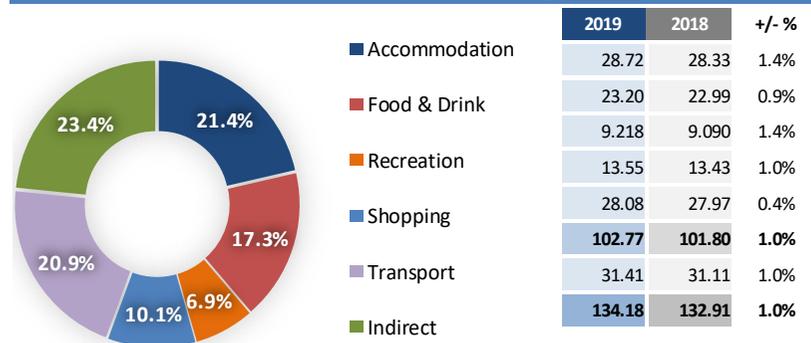
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2019 & 2018 - INDEXED TO 2019

KEY	Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced																	
	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %			
Visitor Days 000s	505.09	503.93	0.2%	504.27	510.83	-1.3%	544.70	548.86	-0.8%	1,554.06	1,563.62	-0.6%	332.88	316.07	5.3%	1,886.94	1,879.70	0.4%			
Visitor Numbers 000s	281.67	289.45	-2.7%	69.18	71.00	-2.6%	120.44	121.36	-0.8%	471.28	481.81	-2.2%	332.88	316.07	5.3%	804.16	797.88	0.8%			
Direct Expenditure £M																102.77	101.80	1.0%			
Economic Impact £M	72.09	71.59	0.7%	26.99	27.04	-0.2%	16.89	17.01	-0.7%	115.97	115.65	0.3%	18.21	17.26	5.5%	134.18	132.91	1.0%			
Direct Employment FTEs	1,490	1,479	0.7%	547	548	-0.3%	192	194	-0.7%	2,229	2,221	0.4%	207	196	5.5%	2,436	2,417	0.8%			
Total Employment FTEs																2,911	2,888	0.8%			

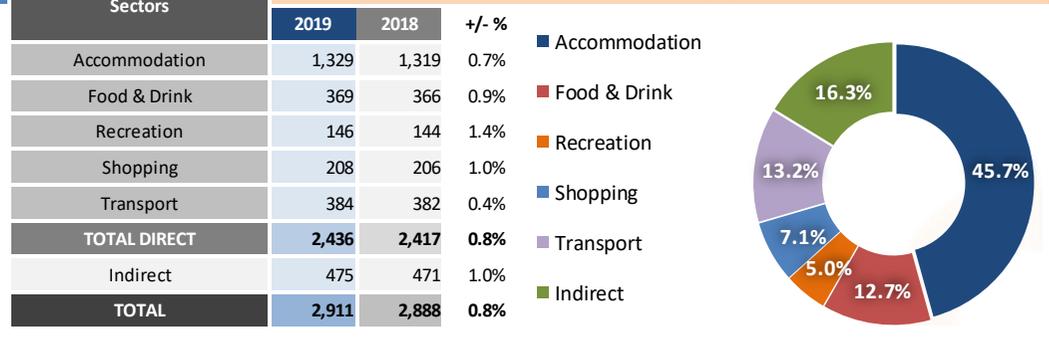
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2019 & 2018 - INDEXED TO 2019



Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2019



Sectoral Distribution of Employment - FTEs



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Report Prepared by: Alison Tipler. Date of Issue: 12/05/20

STEAM FINAL TREND REPORT FOR 2009-2019

VISIT MORAY SPEYSIDE

2009 to 2019
2019 Prices

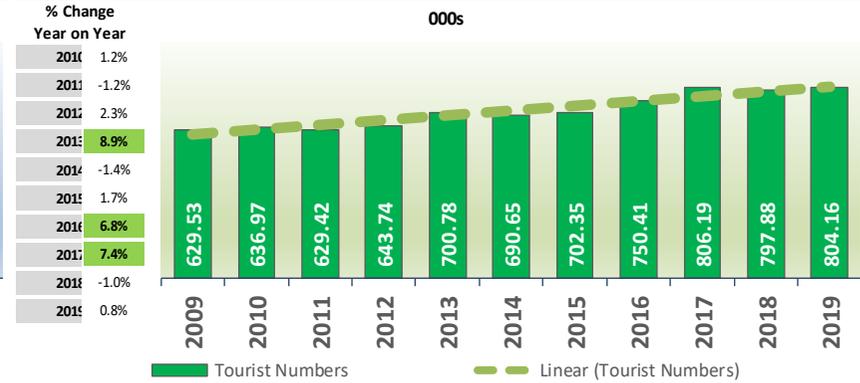
TOTAL

KEY MEASURES
Indexed

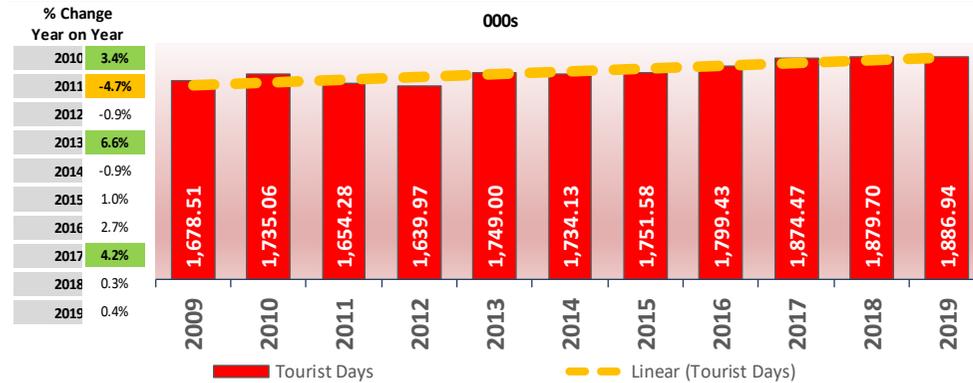
Economic Impact - Indexed - Total



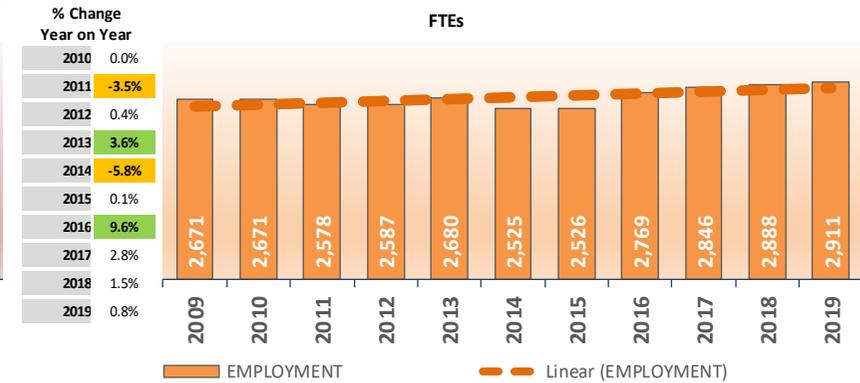
Visitor Numbers - Total



Visitor Days - Total



Total Employment Supported - Total



% Change from 2009	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Impact - Indexed		1.7%	-3.5%	-4.0%	0.9%	5.9%	8.6%	19.2%	27.3%	23.1%	24.3%
Visitor Numbers		1.2%	0.0%	2.3%	11.3%	9.7%	11.6%	19.2%	28.1%	26.7%	27.7%
Visitor Days		3.4%	-1.4%	-2.3%	4.2%	3.3%	4.4%	7.2%	11.7%	12.0%	12.4%
Total Employment		0.0%	-3.5%	-3.2%	0.3%	-5.5%	-5.4%	3.7%	6.5%	8.1%	9.0%

"Linear" = Linear Trendline

STEAM FINAL TREND REPORT FOR 2009-2019

VISIT MORAY SPEYSIDE

2009 to 2019
2019 Prices

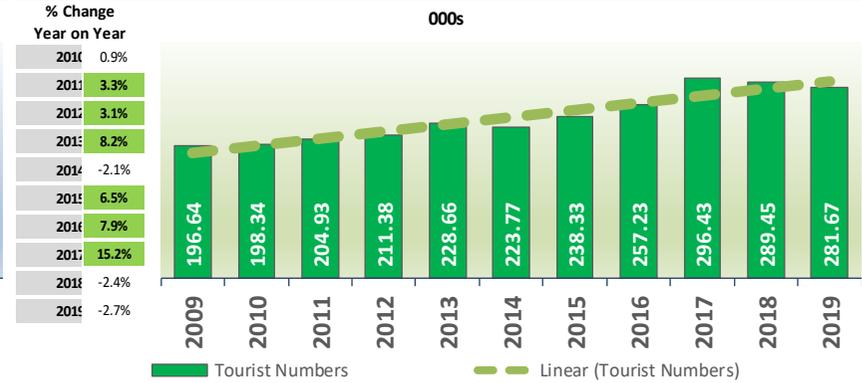
SERVICED
ACCOMMODATION

KEY MEASURES
Indexed

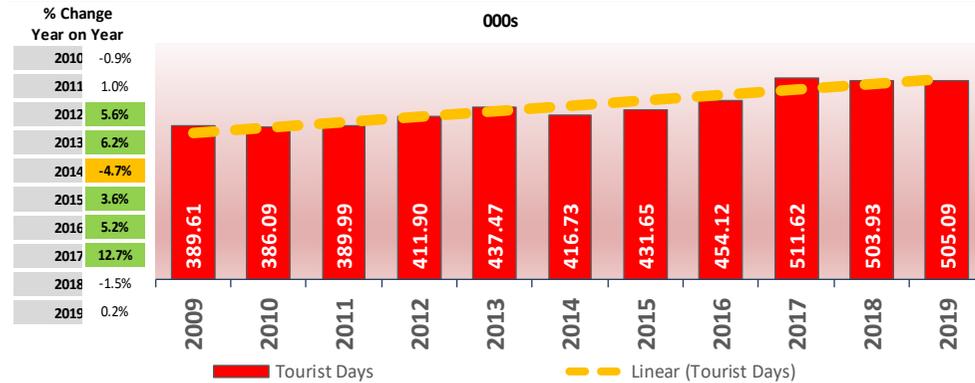
Economic Impact - Indexed - Serviced Accommodation



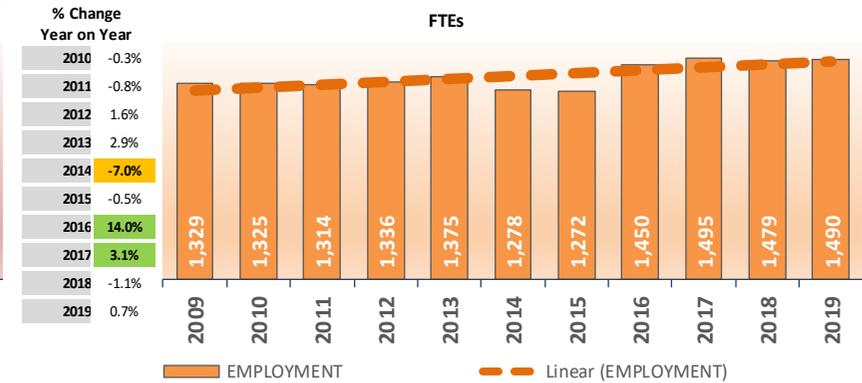
Visitor Numbers - Serviced Accommodation



Visitor Days - Serviced Accommodation



Direct Employment Supported - Serviced Accommodation



% Change from 2009	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Impact - Indexed		-1.3%	-3.7%	-1.5%	3.0%	11.2%	17.3%	36.5%	51.1%	42.0%	43.0%
Visitor Numbers		0.9%	4.2%	7.5%	16.3%	13.8%	21.2%	30.8%	50.7%	47.2%	43.2%
Visitor Days		-0.9%	0.1%	5.7%	12.3%	7.0%	10.8%	16.6%	31.3%	29.3%	29.6%
Direct Employment		-0.3%	-1.1%	0.5%	3.5%	-3.8%	-4.3%	9.1%	12.5%	11.3%	12.2%

"Linear" = Linear Trendline

STEAM FINAL TREND REPORT FOR 2009-2019

VISIT MORAY SPEYSIDE

2009 to 2019
2019 Prices

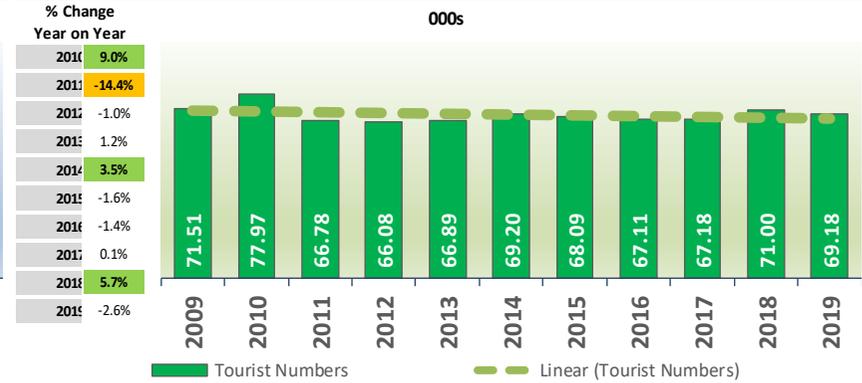
NON-SERVICED
ACCOMMODATION

KEY MEASURES
Indexed

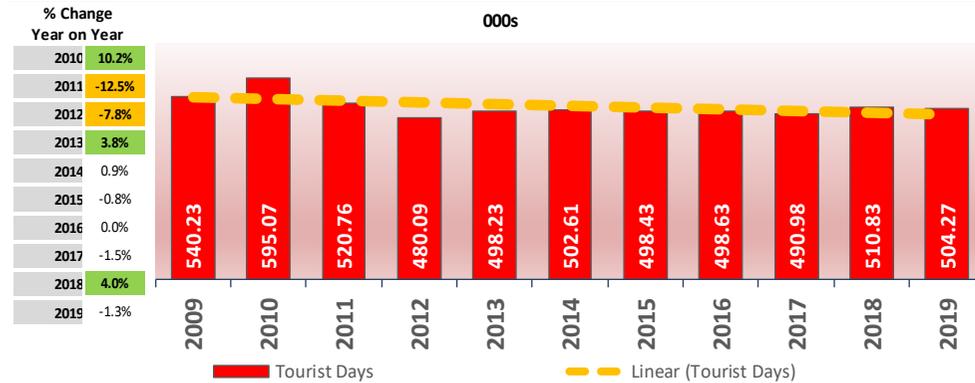
Economic Impact - Indexed - Non-Serviced Accommodation



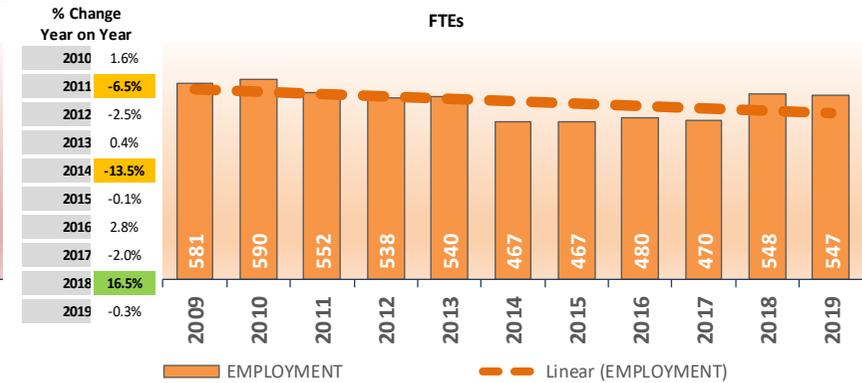
Visitor Numbers - Non-Serviced Accommodation



Visitor Days - Non-Serviced Accommodation



Direct Employment Supported - Non-Serviced Accommodation



% Change from 2009	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Impact - Indexed		8.4%	-5.9%	-13.4%	-12.6%	-6.6%	-7.3%	-6.5%	-5.4%	-3.3%	-3.5%
Visitor Numbers		9.0%	-6.6%	-7.6%	-6.5%	-3.2%	-4.8%	-6.2%	-6.1%	-0.7%	-3.3%
Visitor Days		10.2%	-3.6%	-11.1%	-7.8%	-7.0%	-7.7%	-7.7%	-9.1%	-5.4%	-6.7%
Direct Employment		1.6%	-5.1%	-7.4%	-7.1%	-19.6%	-19.7%	-17.4%	-19.1%	-5.7%	-6.0%

"Linear" = Linear Trendline

STEAM FINAL TREND REPORT FOR 2009-2019

VISIT MORAY SPEYSIDE

2009 to 2019
2019 Prices

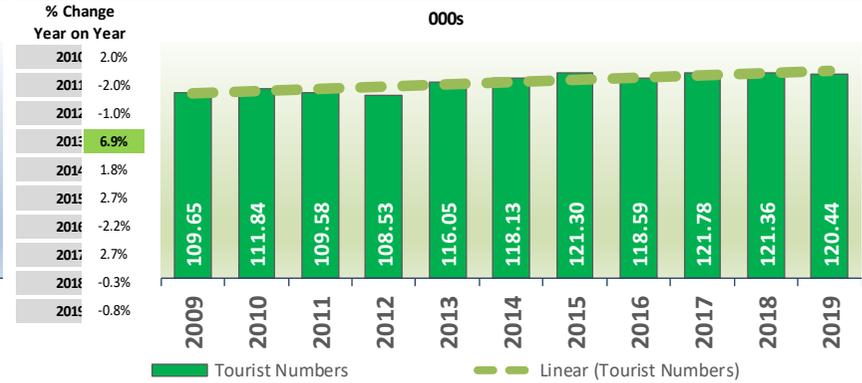
SFR

KEY MEASURES
Indexed

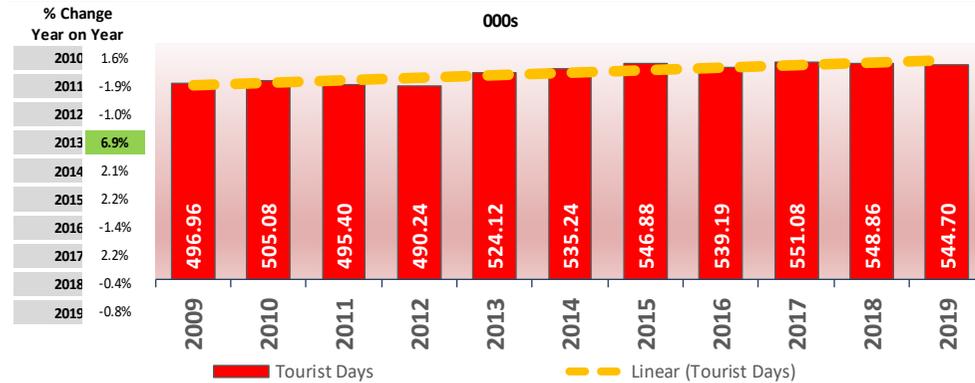
Economic Impact - Indexed - SFR



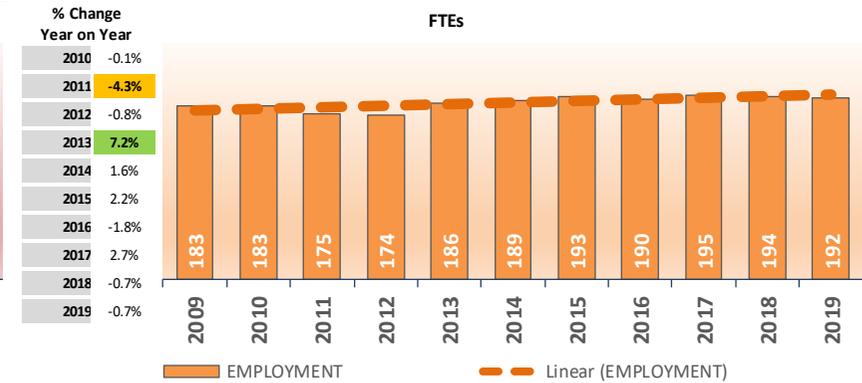
Visitor Numbers - SFR



Visitor Days - SFR



Direct Employment Supported - SFR



% Change from 2009	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Impact - Indexed		2.1%	-0.2%	-1.0%	6.2%	7.9%	10.2%	8.6%	11.6%	10.8%	10.0%
Visitor Numbers		2.0%	-0.1%	-1.0%	5.8%	7.7%	10.6%	8.2%	11.1%	10.7%	9.8%
Visitor Days		1.6%	-0.3%	-1.4%	5.5%	7.7%	10.0%	8.5%	10.9%	10.4%	9.6%
Direct Employment		-0.1%	-4.4%	-5.1%	1.7%	3.4%	5.6%	3.7%	6.5%	5.8%	5.0%

"Linear" = Linear Trendline

STEAM FINAL TREND REPORT FOR 2009-2019

VISIT MORAY SPEYSIDE

2009 to 2019
2019 Prices

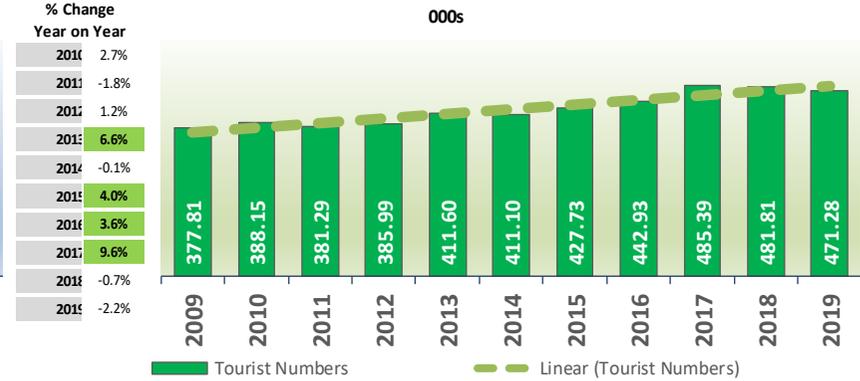
STAYING VISITOR

KEY MEASURES
Indexed

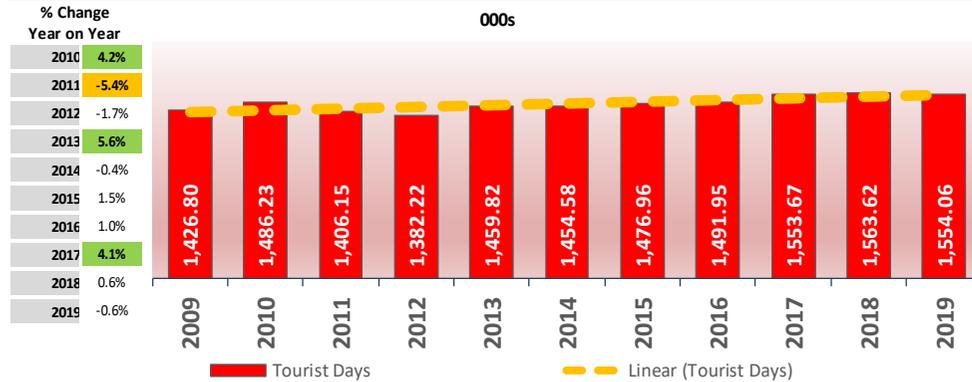
Economic Impact - Indexed - Staying Visitor



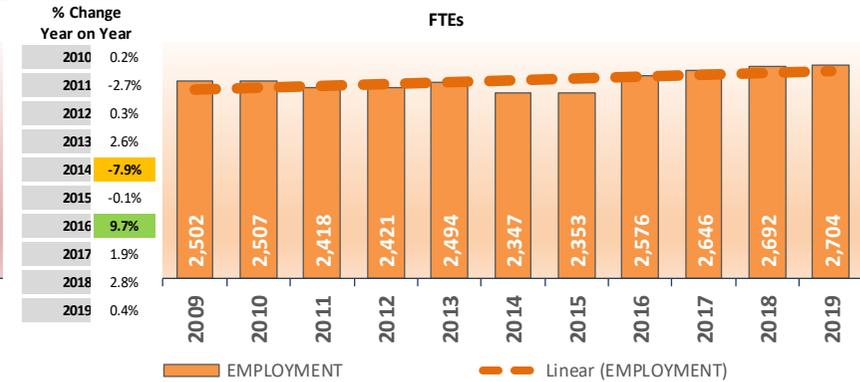
Visitor Numbers - Staying Visitor



Visitor Days - Staying Visitor



Direct Employment Supported - Staying Visitor



% Change from 2009	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Impact - Indexed		2.2%	-3.8%	-5.0%	-1.2%	5.3%	8.8%	19.1%	27.8%	23.4%	23.7%
Visitor Numbers		2.7%	0.9%	2.2%	8.9%	8.8%	13.2%	17.2%	28.5%	27.5%	24.7%
Visitor Days		4.2%	-1.4%	-3.1%	2.3%	1.9%	3.5%	4.6%	8.9%	9.6%	8.9%
Direct Employment		0.2%	-3.3%	-3.2%	-0.3%	-6.2%	-5.9%	3.0%	5.8%	7.6%	8.1%

"Linear" = Linear Trendline

STEAM FINAL TREND REPORT FOR 2009-2019

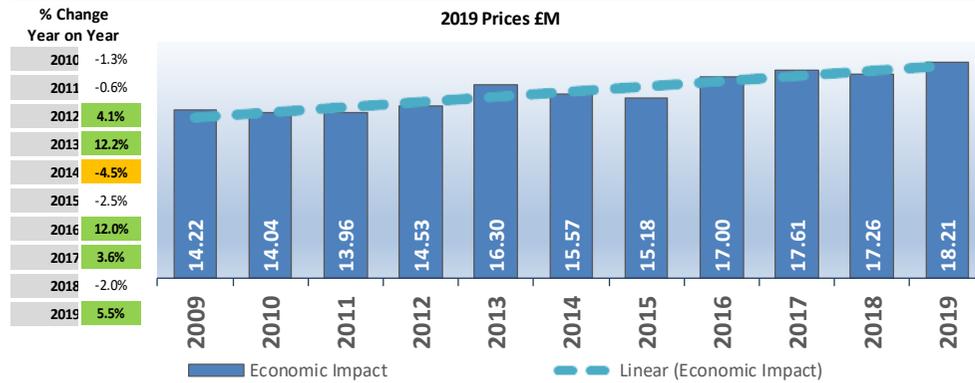
VISIT MORAY SPEYSIDE

2009 to 2019
2019 Prices

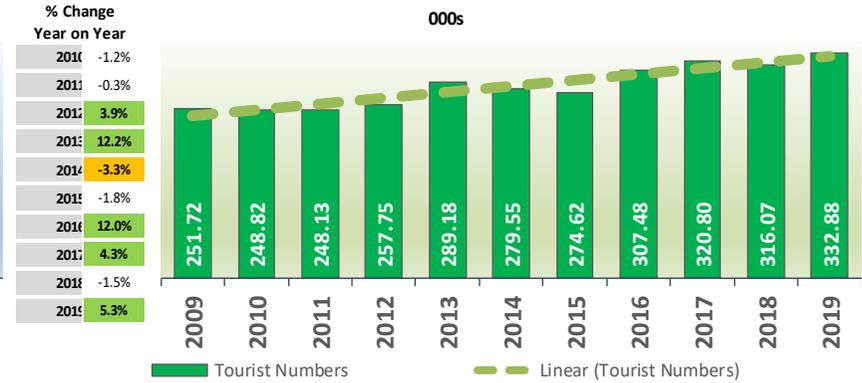
DAY VISITOR

KEY MEASURES
Indexed

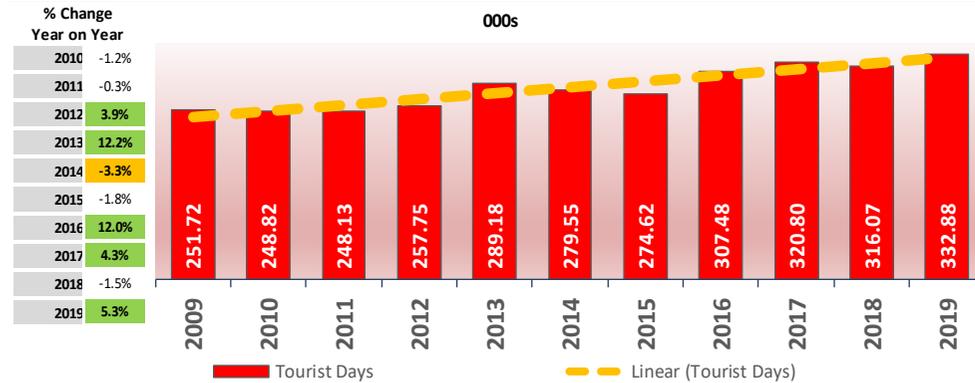
Economic Impact - Indexed - Day Visitor



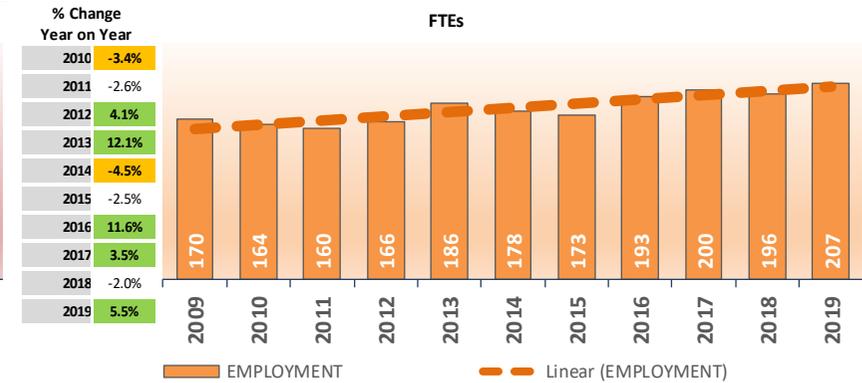
Visitor Numbers - Day Visitor



Visitor Days - Day Visitor



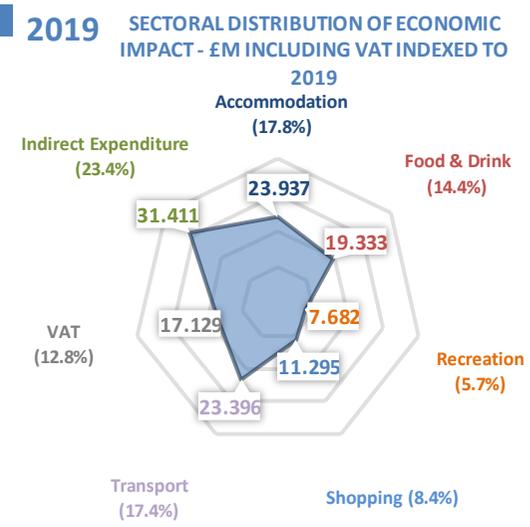
Direct Employment Supported - Day Visitor



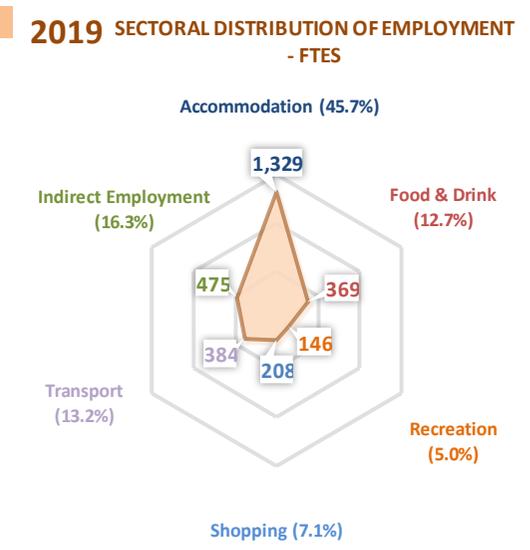
% Change from 2009	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Impact - Indexed		-1.3%	-1.8%	2.2%	14.6%	9.5%	6.8%	19.5%	23.8%	21.4%	28.1%
Visitor Numbers		-1.2%	-1.4%	2.4%	14.9%	11.1%	9.1%	22.2%	27.4%	25.6%	32.2%
Visitor Days		-1.2%	-1.4%	2.4%	14.9%	11.1%	9.1%	22.2%	27.4%	25.6%	32.2%
Direct Employment		-3.4%	-6.0%	-2.1%	9.8%	4.8%	2.2%	14.0%	18.0%	15.6%	22.0%

"Linear" = Linear Trendline

SECTORAL DISTRIBUTION OF ECONOMIC IMPACT - £M INCLUDING VAT INDEXED TO 2019												
SECTOR / YEAR		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Accommodation	£M	21.04	20.35	18.32	18.13	18.62	19.64	22.21	24.26	26.98	23.60	23.94
Food & Drink	£M	15.55	15.58	14.72	14.91	15.98	16.67	16.46	18.10	19.24	19.16	19.33
Recreation	£M	6.828	6.780	6.459	6.574	7.062	6.865	6.870	7.271	7.652	7.575	7.682
Shopping	£M	9.222	9.245	8.690	8.678	9.266	9.723	9.650	10.61	11.14	11.19	11.30
Transport	£M	18.80	19.06	17.92	17.53	18.29	19.76	19.37	21.86	22.73	23.31	23.40
Direct Revenue	£M	71.45	71.01	66.11	65.82	69.22	72.65	74.57	82.09	87.75	84.84	85.64
VAT	£M	10.72	12.43	13.22	13.16	13.84	14.53	14.91	16.42	17.55	16.97	17.13
Direct Expenditure	£M	82.16	83.43	79.33	78.99	83.07	87.18	89.48	98.51	105.30	101.80	102.77
Indirect Expenditure	£M	25.79	26.37	24.83	24.60	25.88	27.12	27.71	30.13	32.08	31.11	31.41
TOTAL	£M	107.95	109.81	104.16	103.58	108.95	114.30	117.19	128.64	137.37	132.91	134.18



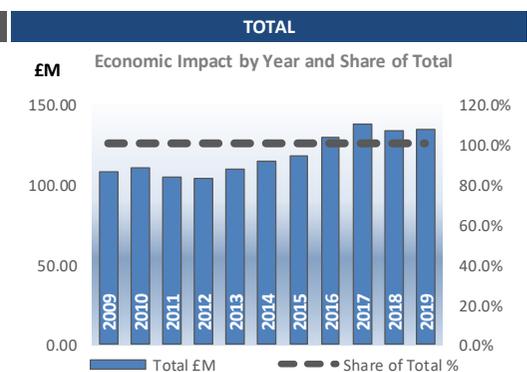
SECTORAL DISTRIBUTION OF EMPLOYMENT - FTEs												
SECTOR / YEAR		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Accommodation	FTEs	1,354	1,350	1,340	1,354	1,375	1,158	1,162	1,276	1,270	1,319	1,329
Food & Drink	FTEs	298	299	282	286	306	320	316	346	368	366	369
Recreation	FTEs	130	129	123	125	134	131	131	138	145	144	146
Shopping	FTEs	170	171	160	160	171	179	178	195	205	206	208
Transport	FTEs	310	314	295	288	301	325	319	359	373	382	384
Direct Employment	FTEs	2,263	2,262	2,201	2,214	2,288	2,113	2,106	2,313	2,361	2,417	2,436
Indirect Employment	FTEs	409	409	377	373	393	412	421	456	485	471	475
TOTAL	FTEs	2,671	2,671	2,578	2,587	2,680	2,525	2,526	2,769	2,846	2,888	2,911



Note: This report caters for a period of up to 12 years. Parts of this page are intentionally left blank to accommodate new data as it becomes available.

STEAM FINAL TREND REPORT FOR 2009-2019 VISIT MORAY SPEYSIDE													2009 to 2019 2019 Prices	TOTAL	ECONOMIC IMPACT Indexed				
ECONOMIC IMPACT BY:	MONTH AND QUARTER												CALENDAR YEAR		QUARTER				
KEY	TOTAL												TOTAL	% Change					
An increase of 3% or more	ECONOMIC IMPACT £M - INDEXED TO 2019 / PERCENTAGE CHANGES												TOTAL	% Change					
Less than 3% change	Q1			Q2			Q3			Q4					Q1	Q2	Q3	Q4	
A Fall of 3% or more	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC							
% Change 2009 to 2019	-4.1%	19.7%	14.3%	37.6%	38.4%	29.5%	15.2%	24.7%	46.3%	28.3%	8.3%	21.8%	24.3%	9.6%	35.0%	26.1%	20.6%		
% Change 2018 to 2019	3.3%	4.1%	2.6%	2.2%	1.3%	0.7%	1.1%	0.9%	0.7%	0.6%	-6.0%	-1.4%	1.0%	3.3%	1.3%	0.9%	-1.8%		
Average Annual Change	-0.4%	2.0%	1.4%	3.8%	3.8%	3.0%	1.5%	2.5%	4.6%	2.8%	0.8%	2.2%	2.4%	1.0%	3.5%	2.6%	2.1%		
2009	£M	7.131	6.387	7.014	7.813	10.33	10.15	15.21	15.50	9.167	8.560	5.868	4.815	107.95	20.53	28.30	39.88	19.24	
2010	£M	6.420	5.852	8.826	8.722	11.25	11.99	14.25	14.89	9.391	8.846	4.815	4.568	109.81	21.10	31.96	38.52	18.23	
2011	£M	5.232	6.524	7.654	9.123	9.747	10.79	13.24	13.95	8.404	8.734	5.386	5.365	104.16	-5.1%	19.41	29.66	35.60	19.48
2012	£M	7.132	6.837	8.320	8.054	8.846	10.80	13.22	13.93	8.950	7.680	4.687	5.124	103.58	-0.6%	22.29	27.70	36.10	17.49
2013	£M	7.177	7.186	9.912	8.538	9.798	10.69	14.82	14.99	9.153	7.915	4.398	4.382	108.95	5.2%	24.28	29.02	38.96	16.70
2014	£M	6.410	7.101	7.722	8.625	11.93	11.44	15.09	16.37	9.597	8.762	5.372	5.872	114.30	4.9%	21.23	31.99	41.07	20.01
2015	£M	7.153	7.241	7.824	8.827	12.19	11.32	15.49	15.46	9.713	9.751	5.946	6.279	117.19	2.5%	22.22	32.34	40.66	21.98
2016	£M	5.895	6.999	8.724	9.140	13.37	13.33	18.58	18.38	11.30	10.57	5.759	6.591	128.64	9.8%	21.62	35.84	48.26	22.92
2017	£M	8.027	7.922	8.348	10.96	14.43	13.95	19.31	18.76	11.91	10.88	6.632	6.244	137.37	6.8%	24.30	39.34	49.98	23.75
2018	£M	6.621	7.350	7.814	10.52	14.11	13.06	17.33	19.15	13.31	10.92	6.762	5.948	132.91	-3.2%	21.78	37.70	49.80	23.63
2019	£M	6.840	7.648	8.020	10.75	14.30	13.15	17.53	19.33	13.41	10.98	6.356	5.865	134.18	1.0%	22.51	38.20	50.27	23.21

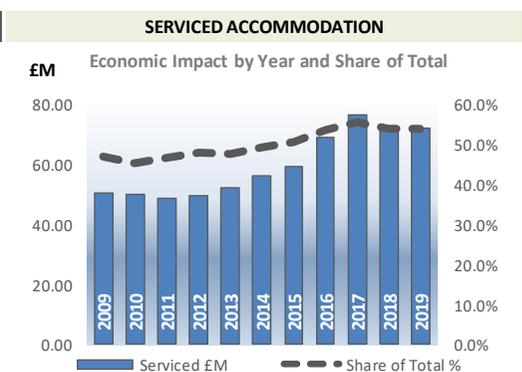
ECONOMIC IMPACT - INDEXED TO 2019												
SHARE OF MARKET	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Total	£M	107.95	109.81	104.16	103.58	108.95	114.30	117.19	128.64	137.37	132.91	134.18
All Visitor Types	£M	107.95	109.81	104.16	103.58	108.95	114.30	117.19	128.64	137.37	132.91	134.18
Share of Total	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual Change in Share	%											
Change in Share from 2009	%											
Avg Ann. Change in Share	%											



Note: This report caters for a period of up to 12 years. Parts of this page are intentionally left blank to accommodate new data as it becomes available.

STEAM FINAL TREND REPORT FOR 2009-2019 VISIT MORAY SPEYSIDE													2009 to 2019 2019 Prices		SERVICED ACCOMMODATION		ECONOMIC IMPACT Indexed			
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		SERVICED ACCOMMODATION											TOTAL						% Change	
An increase of 3% or more		ECONOMIC IMPACT £M - INDEXED TO 2019 / PERCENTAGE CHANGES													Annual Change					
Less than 3% change		Q1			Q2			Q3			Q4									
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4	
% Change 2009 to 2019		-8.8%	23.0%	52.3%	56.7%	54.3%	62.1%	22.4%	67.7%	89.1%	43.0%	2.5%	40.2%	43.0%		20.5%	57.7%	56.1%	27.1%	
% Change 2018 to 2019		1.0%	-1.8%	0.0%	1.9%	0.9%	0.9%	1.7%	1.0%	0.1%	1.8%	-0.3%	-0.8%	0.7%		-0.3%	1.2%	0.9%	0.6%	
Average Annual Change		-0.9%	2.3%	5.2%	5.7%	5.4%	6.2%	2.2%	6.8%	8.9%	4.3%	0.3%	4.0%	4.3%		2.0%	5.8%	5.6%	2.7%	
2009	£M	3.871	3.484	3.287	3.203	4.109	3.921	6.928	6.621	4.728	4.206	3.877	2.171	50.41		10.64	11.23	18.28	10.25	
2010	£M	3.120	2.810	4.719	3.601	4.811	4.676	6.882	6.558	4.646	4.073	2.324	1.554	49.77	-1.3%	10.65	13.09	18.09	7.951	
2011	£M	2.286	3.563	4.157	3.562	3.769	4.107	6.159	6.276	4.371	4.511	3.212	2.589	48.56	-2.4%	10.00	11.44	16.81	10.31	
2012	£M	4.031	3.639	4.630	3.491	3.185	4.246	6.459	6.564	4.738	3.783	2.631	2.233	49.63	2.2%	12.30	10.92	17.76	8.646	
2013	£M	3.971	3.722	5.419	3.574	3.449	4.300	7.175	7.137	4.936	3.974	2.435	1.808	51.90	4.6%	13.11	11.32	19.25	8.217	
2014	£M	3.258	3.719	4.353	3.702	4.867	4.983	7.250	7.900	5.409	4.394	3.292	2.922	56.05	8.0%	11.33	13.55	20.56	10.61	
2015	£M	3.877	4.201	4.648	4.036	5.488	4.905	7.431	7.438	5.115	5.131	3.749	3.126	59.14	5.5%	12.73	14.43	19.98	12.01	
2016	£M	2.887	3.991	5.457	4.295	6.140	6.361	9.698	9.861	6.867	5.717	3.676	3.852	68.80	16.3%	12.34	16.80	26.43	13.25	
2017	£M	4.698	4.809	5.609	5.384	6.894	7.059	10.09	10.51	7.460	6.091	4.148	3.436	76.18	10.7%	15.12	19.34	28.05	13.68	
2018	£M	3.496	4.363	5.004	4.925	6.284	6.304	8.340	10.99	8.928	5.904	3.987	3.066	71.59	-6.0%	12.86	17.51	28.26	12.96	
2019	£M	3.531	4.287	5.005	5.020	6.339	6.357	8.483	11.10	8.939	6.013	3.974	3.043	72.09	0.7%	12.82	17.72	28.52	13.03	

ECONOMIC IMPACT - INDEXED TO 2019												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Serviced	£M	50.41	49.77	48.56	49.63	51.90	56.05	59.14	68.80	76.18	71.59	72.09
All Visitor Types	£M	107.95	109.81	104.16	103.58	108.95	114.30	117.19	128.64	137.37	132.91	134.18
Share of Total	%	46.7%	45.3%	46.6%	47.9%	47.6%	49.0%	50.5%	53.5%	55.5%	53.9%	53.7%
Annual Change in Share	%		-2.9%	2.9%	2.8%	-0.6%	2.9%	2.9%	6.0%	3.7%	-2.9%	-0.3%
Change in Share from 2009	%		-2.9%	-0.2%	2.6%	2.0%	5.0%	8.1%	14.5%	18.8%	15.4%	15.1%
Avg Ann. Change in Share	%		-2.9%	-0.1%	0.9%	0.5%	1.0%	1.3%	2.1%	2.3%	1.7%	1.5%



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STEAM FINAL TREND REPORT FOR 2009-2019 VISIT MORAY SPEYSIDE													2009 to 2019 2019 Prices		NON-SERVICED ACCOMMODATION	ECONOMIC IMPACT Indexed			
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER				
KEY		NON-SERVICED ACCOMMODATION											TOTAL						Annual Change
An increase of 3% or more		ECONOMIC IMPACT £M - INDEXED TO 2019 / PERCENTAGE CHANGES																	
Less than 3% change		Q1			Q2			Q3			Q4								
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4
% Change 2009 to 2019		-54.0%	-26.2%	6.8%	26.5%	-3.5%	0.8%	-14.0%	-16.0%	-21.0%	13.8%	179.5%	-1.2%	-3.5%	-22.5%	5.7%	-16.4%	29.8%	
% Change 2018 to 2019		-1.0%	6.5%	3.8%	2.8%	2.4%	-0.7%	-1.9%	0.0%	0.3%	-2.9%	-2.9%	-6.2%	-0.2%	3.7%	1.4%	-0.7%	-3.2%	
Average Annual Change		-5.4%	-2.6%	0.7%	2.6%	-0.3%	0.1%	-1.4%	-1.6%	-2.1%	1.4%	17.9%	-0.1%	-0.4%	-2.3%	0.6%	-1.6%	3.0%	
2009	£M	0.454	0.485	0.549	2.388	3.528	3.431	5.235	5.323	3.074	2.684	0.379	0.446	27.98	1.487	9.347	13.63	3.509	
2010	£M	0.563	0.668	0.855	2.785	3.660	4.320	4.516	4.921	3.388	3.042	0.866	0.738	30.32	8.4%	2.086	10.76	12.83	4.646
2011	£M	0.367	0.429	0.517	3.115	3.248	3.707	4.278	4.441	2.711	2.540	0.532	0.435	26.32	-13.2%	1.312	10.07	11.43	3.506
2012	£M	0.326	0.414	0.508	2.264	2.886	3.532	3.902	4.194	2.865	2.279	0.556	0.495	24.22	-8.0%	1.248	8.682	10.96	3.331
2013	£M	0.186	0.300	0.786	2.523	3.071	3.297	4.322	4.312	2.682	2.193	0.461	0.320	24.45	1.0%	1.272	8.891	11.32	2.973
2014	£M	0.299	0.544	0.487	2.424	3.541	3.333	4.383	4.835	2.683	2.553	0.554	0.481	26.12	6.8%	1.330	9.298	11.90	3.588
2015	£M	0.345	0.435	0.636	2.363	3.105	3.392	4.233	4.470	2.936	2.766	0.648	0.614	25.94	-0.7%	1.416	8.859	11.64	4.028
2016	£M	0.240	0.317	0.564	2.411	3.198	3.695	4.710	4.791	2.570	2.931	0.518	0.220	26.17	0.9%	1.121	9.305	12.07	3.668
2017	£M	0.182	0.298	0.424	2.887	3.195	3.583	4.627	4.571	2.505	2.910	0.853	0.416	26.45	1.1%	0.904	9.665	11.70	4.179
2018	£M	0.211	0.336	0.565	2.937	3.325	3.480	4.591	4.470	2.423	3.145	1.091	0.470	27.04	2.2%	1.111	9.742	11.48	4.707
2019	£M	0.209	0.358	0.586	3.020	3.405	3.457	4.502	4.470	2.430	3.053	1.060	0.441	26.99	-0.2%	1.152	9.882	11.40	4.555

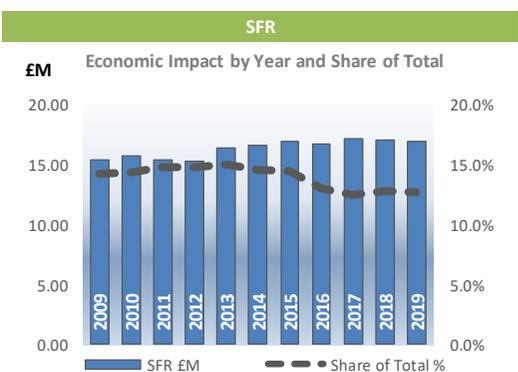
ECONOMIC IMPACT - INDEXED TO 2019												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Non-Serviced	£M	27.98	30.32	26.32	24.22	24.45	26.12	25.94	26.17	26.45	27.04	26.99
All Visitor Types	£M	107.95	109.81	104.16	103.58	108.95	114.30	117.19	128.64	137.37	132.91	134.18
Share of Total	%	25.9%	27.6%	25.3%	23.4%	22.4%	22.8%	22.1%	20.3%	19.3%	20.3%	20.1%
Annual Change in Share	%		6.6%	-8.5%	-7.5%	-4.0%	1.8%	-3.1%	-8.1%	-5.3%	5.7%	-1.1%
Change in Share from 2009	%		6.6%	-2.5%	-9.8%	-13.4%	-11.8%	-14.6%	-21.5%	-25.7%	-21.5%	-22.4%
Avg Ann. Change in Share	%		6.6%	-1.2%	-3.3%	-3.3%	-2.4%	-2.4%	-3.1%	-3.2%	-2.4%	-2.2%



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STEAM FINAL TREND REPORT FOR 2009-2019 VISIT MORAY SPEYSIDE													2009 to 2019 2019 Prices		SFR	ECONOMIC IMPACT Indexed					
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER						
KEY		SFR											TOTAL						% Change		
An increase of 3% or more		ECONOMIC IMPACT £M - INDEXED TO 2019 / PERCENTAGE CHANGES											TOTAL		% Change						
Less than 3% change		Q1			Q2			Q3			Q4			TOTAL		% Change					
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL		% Change					
% Change 2009 to 2019		-5.1%	5.3%	14.5%	18.8%	11.9%	12.7%	5.4%	8.8%	12.5%	14.5%	14.0%	10.6%	10.0%	Annual Change		3.0%	14.6%	8.6%	12.4%	
% Change 2018 to 2019		-0.5%	-1.0%	-0.7%	0.0%	-0.1%	-0.8%	-1.0%	-0.6%	-0.6%	-1.1%	-1.6%	-1.4%	-0.7%	Annual Change		-0.7%	-0.3%	-0.7%	-1.4%	
Average Annual Change		-0.5%	0.5%	1.5%	1.9%	1.2%	1.3%	0.5%	0.9%	1.3%	1.4%	1.4%	1.1%	1.0%	Annual Change		0.3%	1.5%	0.9%	1.2%	
2009	£M	1.470	0.798	0.886	1.577	1.317	1.722	1.240	2.191	0.872	0.821	0.755	1.701	15.35	Annual Change		3.153	4.615	4.303	3.277	
2010	£M	1.421	0.790	1.010	1.653	1.360	1.842	1.205	2.164	0.894	0.843	0.730	1.761	15.67	2.1%	Annual Change		3.221	4.854	4.263	3.334
2011	£M	1.258	0.803	0.934	1.693	1.290	1.768	1.190	2.123	0.855	0.838	0.744	1.823	15.32	-2.3%	Annual Change		2.996	4.751	4.168	3.405
2012	£M	1.440	0.792	0.981	1.597	1.238	1.756	1.178	2.107	0.872	0.794	0.706	1.741	15.20	-0.8%	Annual Change		3.213	4.590	4.157	3.241
2013	£M	1.495	0.848	1.190	1.756	1.361	1.862	1.302	2.286	0.929	0.851	0.728	1.689	16.30	7.2%	Annual Change		3.533	4.979	4.517	3.267
2014	£M	1.460	0.880	0.977	1.749	1.465	1.909	1.297	2.360	0.939	0.877	0.777	1.874	16.56	1.6%	Annual Change		3.316	5.124	4.596	3.529
2015	£M	1.560	0.883	1.023	1.752	1.440	1.902	1.292	2.311	0.949	0.931	0.854	2.025	16.92	2.2%	Annual Change		3.466	5.094	4.552	3.810
2016	£M	1.328	0.798	1.040	1.750	1.448	1.965	1.353	2.406	0.952	0.925	0.774	1.933	16.67	-1.5%	Annual Change		3.166	5.163	4.711	3.632
2017	£M	1.506	0.851	1.016	1.890	1.480	2.007	1.346	2.391	0.964	0.935	0.836	1.907	17.13	2.7%	Annual Change		3.373	5.377	4.701	3.678
2018	£M	1.401	0.849	1.021	1.873	1.474	1.956	1.320	2.398	0.988	0.951	0.875	1.908	17.01	-0.7%	Annual Change		3.271	5.303	4.706	3.733
2019	£M	1.394	0.840	1.014	1.873	1.474	1.941	1.307	2.384	0.981	0.940	0.861	1.881	16.89	-0.7%	Annual Change		3.248	5.287	4.672	3.682

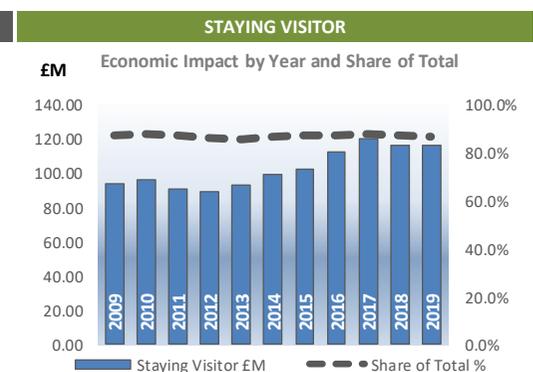
ECONOMIC IMPACT - INDEXED TO 2019												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
SFR	£M	15.35	15.67	15.32	15.20	16.30	16.56	16.92	16.67	17.13	17.01	16.89
All Visitor Types	£M	107.95	109.81	104.16	103.58	108.95	114.30	117.19	128.64	137.37	132.91	134.18
Share of Total	%	14.2%	14.3%	14.7%	14.7%	15.0%	14.5%	14.4%	13.0%	12.5%	12.8%	12.6%
Annual Change in Share	%		0.4%	3.0%	-0.2%	1.9%	-3.1%	-0.4%	-10.2%	-3.8%	2.7%	-1.7%
Change in Share from 2009	%		0.4%	3.4%	3.2%	5.2%	1.9%	1.6%	-8.9%	-12.3%	-10.0%	-11.5%
Avg Ann. Change in Share	%		0.4%	1.7%	1.1%	1.3%	0.4%	0.3%	-1.3%	-1.5%	-1.1%	-1.1%



Note: This report caters for a period of up to 12 years. Parts of this page are intentionally left blank to accommodate new data as it becomes available.

STEAM FINAL TREND REPORT FOR 2009-2019 VISIT MORAY SPEYSIDE													2009 to 2019 2019 Prices		STAYING VISITOR		ECONOMIC IMPACT Indexed			
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		STAYING VISITOR											TOTAL						% Change	
An increase of 3% or more		ECONOMIC IMPACT £M - INDEXED TO 2019 / PERCENTAGE CHANGES											TOTAL		% Change					
Less than 3% change		Q1			Q2			Q3			Q4			TOTAL		% Change				
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL		% Change				
% Change 2009 to 2019		-11.4%	15.0%	39.9%	38.3%	25.3%	29.6%	6.6%	27.0%	42.4%	29.8%	17.6%	24.3%	23.7%	12.7%	30.5%	23.2%	24.8%		
% Change 2018 to 2019		0.5%	-1.1%	0.2%	1.8%	1.2%	0.1%	0.3%	0.5%	0.1%	0.1%	-1.0%	-1.5%	0.3%	-0.1%	1.0%	0.3%	-0.6%		
Average Annual Change		-1.1%	1.5%	4.0%	3.8%	2.5%	3.0%	0.7%	2.7%	4.2%	3.0%	1.8%	2.4%	2.4%	1.3%	3.1%	2.3%	2.5%		
2009	£M	5.794	4.767	4.721	7.168	8.954	9.074	13.40	14.13	8.674	7.710	5.012	4.317	93.73	15.28	25.20	36.21	17.04		
2010	£M	5.104	4.268	6.584	8.039	9.830	10.84	12.60	13.64	8.929	7.958	3.920	4.053	95.77	15.96	28.71	35.17	15.93		
2011	£M	3.911	4.795	5.608	8.370	8.307	9.583	11.63	12.84	7.937	7.888	4.488	4.847	90.20	-5.8%	14.31	26.26	32.40	17.22	
2012	£M	5.797	4.845	6.119	7.352	7.309	9.533	11.54	12.87	8.475	6.856	3.892	4.469	89.05	-1.3%	16.76	24.19	32.88	15.22	
2013	£M	5.651	4.871	7.395	7.853	7.881	9.459	12.80	13.74	8.546	7.017	3.623	3.817	92.65	4.0%	17.92	25.19	35.08	14.46	
2014	£M	5.017	5.143	5.816	7.875	9.874	10.23	12.93	15.10	9.031	7.824	4.624	5.277	98.73	6.6%	15.98	27.97	37.06	17.72	
2015	£M	5.782	5.519	6.306	8.151	10.03	10.20	12.96	14.22	8.999	8.827	5.250	5.765	102.01	3.3%	17.61	28.38	36.17	19.84	
2016	£M	4.455	5.106	7.061	8.457	10.79	12.02	15.76	17.06	10.39	9.573	4.968	6.005	111.64	9.4%	16.62	31.26	43.21	20.55	
2017	£M	6.386	5.958	7.049	10.16	11.57	12.65	16.06	17.47	10.93	9.936	5.836	5.760	119.76	7.3%	19.39	34.38	44.46	21.53	
2018	£M	5.108	5.548	6.589	9.734	11.08	11.74	14.25	17.86	12.34	10.00	5.954	5.445	115.65	-3.4%	17.25	32.56	44.45	21.40	
2019	£M	5.134	5.484	6.605	9.913	11.22	11.76	14.29	17.95	12.35	10.01	5.896	5.364	115.97	0.3%	17.22	32.89	44.60	21.27	

ECONOMIC IMPACT - INDEXED TO 2019												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Staying Visitor	£M	93.73	95.77	90.20	89.05	92.65	98.73	102.01	111.64	119.76	115.65	115.97
All Visitor Types	£M	107.95	109.81	104.16	103.58	108.95	114.30	117.19	128.64	137.37	132.91	134.18
Share of Total	%	86.8%	87.2%	86.6%	86.0%	85.0%	86.4%	87.0%	86.8%	87.2%	87.0%	86.4%
Annual Change in Share	%		0.4%	-0.7%	-0.7%	-1.1%	1.6%	0.8%	-0.3%	0.5%	-0.2%	-0.7%
Change in Share from 2009	%		0.4%	-0.3%	-1.0%	-2.1%	-0.5%	0.2%	0.0%	0.4%	0.2%	-0.5%
Avg Ann. Change in Share	%		0.4%	-0.1%	-0.3%	-0.5%	-0.1%	0.0%	0.0%	0.1%	0.0%	0.0%



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STEAM FINAL TREND REPORT FOR 2009-2019 VISIT MORAY SPEYSIDE													2009 to 2019 2019 Prices		DAY VISITOR		ECONOMIC IMPACT Indexed			
ECONOMIC IMPACT BY:		MONTH AND QUARTER											CALENDAR YEAR		QUARTER					
KEY		DAY VISITOR											TOTAL						% Change	
An increase of 3% or more		ECONOMIC IMPACT £M - INDEXED TO 2019 / PERCENTAGE CHANGES																		
Less than 3% change		Q1			Q2			Q3			Q4									
A Fall of 3% or more		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			Q1	Q2	Q3	Q4	
% Change 2009 to 2019		27.6%	33.6%	-38.3%	30.3%	123.3%	29.4%	79.0%	1.0%	114.6%	15.2%	-46.2%	0.5%	28.1%	Annual Change	0.7%	71.3%	54.8%	-12.0%	
% Change 2018 to 2019		12.7%	20.1%	15.6%	7.0%	1.6%	5.4%	5.1%	6.6%	8.5%	5.9%	-43.0%	-0.6%	5.5%		16.4%	3.4%	6.1%	-13.2%	
Average Annual Change		2.8%	3.4%	-3.8%	3.0%	12.3%	2.9%	7.9%	0.1%	11.5%	1.5%	-4.6%	0.0%	2.8%		0.1%	7.1%	5.5%	-1.2%	
2009	£M	1.337	1.620	2.292	0.646	1.379	1.079	1.810	1.361	0.494	0.850	0.856	0.498	14.22		5.249	3.103	3.665	2.204	
2010	£M	1.316	1.584	2.242	0.683	1.420	1.149	1.642	1.242	0.462	0.888	0.895	0.516	14.04	-1.3%	5.141	3.252	3.347	2.299	
2011	£M	1.322	1.729	2.046	0.754	1.440	1.210	1.616	1.114	0.467	0.845	0.899	0.518	13.96	-0.6%	5.097	3.403	3.197	2.262	
2012	£M	1.335	1.992	2.202	0.702	1.537	1.267	1.681	1.067	0.475	0.824	0.795	0.655	14.53	4.1%	5.529	3.506	3.223	2.274	
2013	£M	1.526	2.315	2.518	0.685	1.917	1.227	2.016	1.251	0.607	0.898	0.775	0.565	16.30	12.2%	6.359	3.829	3.874	2.238	
2014	£M	1.393	1.958	1.906	0.750	2.057	1.213	2.164	1.280	0.567	0.938	0.748	0.595	15.57	-4.5%	5.258	4.020	4.010	2.281	
2015	£M	1.371	1.722	1.518	0.676	2.161	1.119	2.532	1.241	0.714	0.924	0.696	0.514	15.18	-2.5%	4.610	3.956	4.486	2.133	
2016	£M	1.440	1.893	1.663	0.683	2.581	1.309	2.823	1.322	0.911	0.999	0.791	0.586	17.00	12.0%	4.996	4.573	5.056	2.376	
2017	£M	1.640	1.964	1.298	0.800	2.860	1.305	3.255	1.291	0.979	0.940	0.795	0.484	17.61	3.6%	4.903	4.964	5.524	2.219	
2018	£M	1.513	1.802	1.224	0.786	3.029	1.325	3.083	1.289	0.976	0.924	0.808	0.503	17.26	-2.0%	4.539	5.140	5.349	2.235	
2019	£M	1.706	2.163	1.415	0.841	3.079	1.396	3.239	1.375	1.059	0.979	0.460	0.500	18.21	5.5%	5.283	5.315	5.673	1.939	

ECONOMIC IMPACT - INDEXED TO 2019												
SHARE OF MARKET		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Day Visitor	£M	14.22	14.04	13.96	14.53	16.30	15.57	15.18	17.00	17.61	17.26	18.21
All Visitor Types	£M	107.95	109.81	104.16	103.58	108.95	114.30	117.19	128.64	137.37	132.91	134.18
Share of Total	%	13.2%	12.8%	13.4%	14.0%	15.0%	13.6%	13.0%	13.2%	12.8%	13.0%	13.6%
Annual Change in Share	%		-2.9%	4.8%	4.7%	6.6%	-9.0%	-4.9%	2.0%	-3.0%	1.3%	4.5%
Change in Share from 2009	%		-2.9%	1.7%	6.5%	13.6%	3.4%	-1.6%	0.3%	-2.7%	-1.4%	3.0%
Avg Ann. Change in Share	%		-2.9%	0.9%	2.2%	3.4%	0.7%	-0.3%	0.0%	-0.3%	-0.2%	0.3%



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