

# Volume and Value of Tourism in the North-east 2025: *Focus on Aberdeen City*

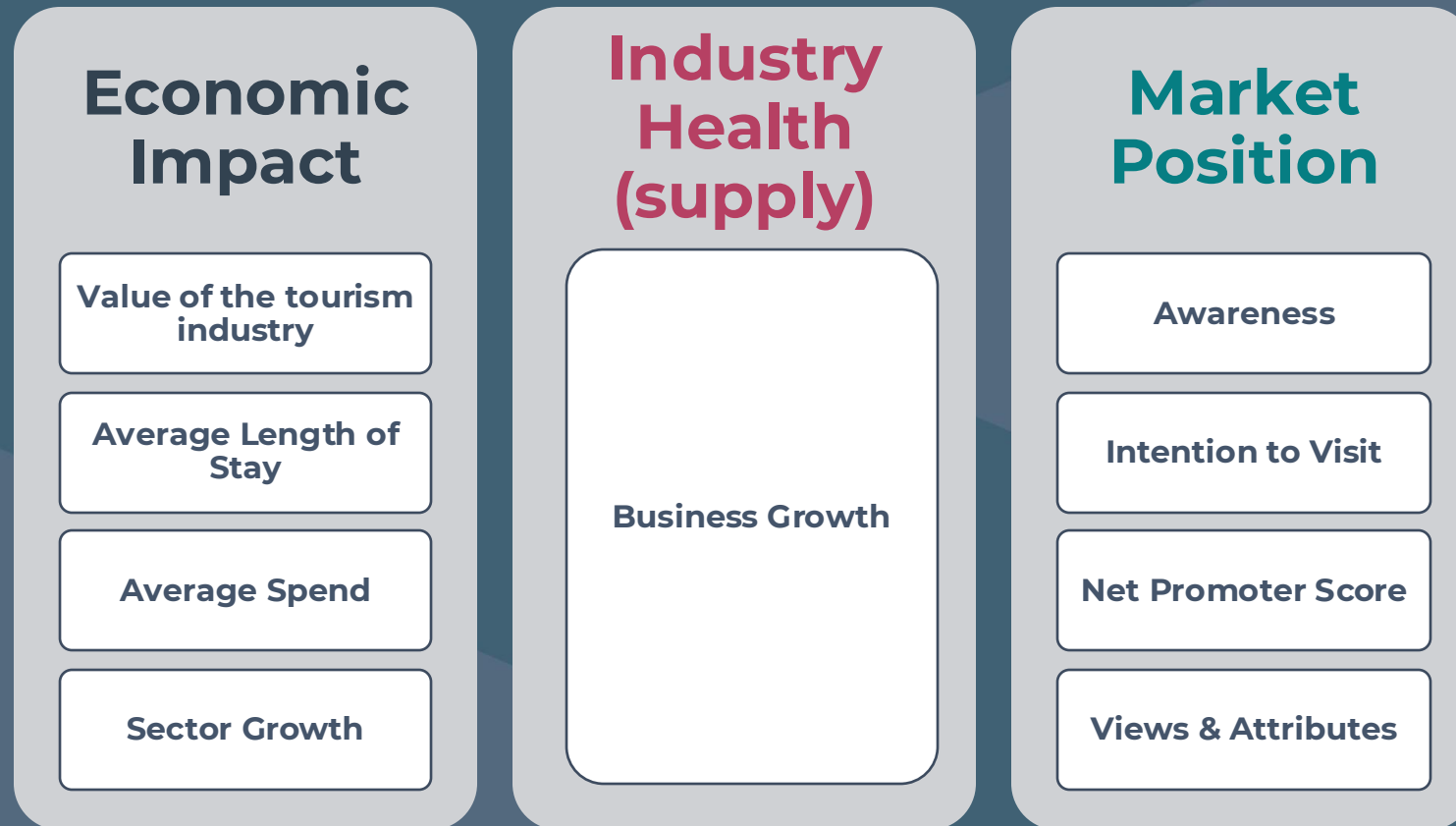


# What is “STEAM”

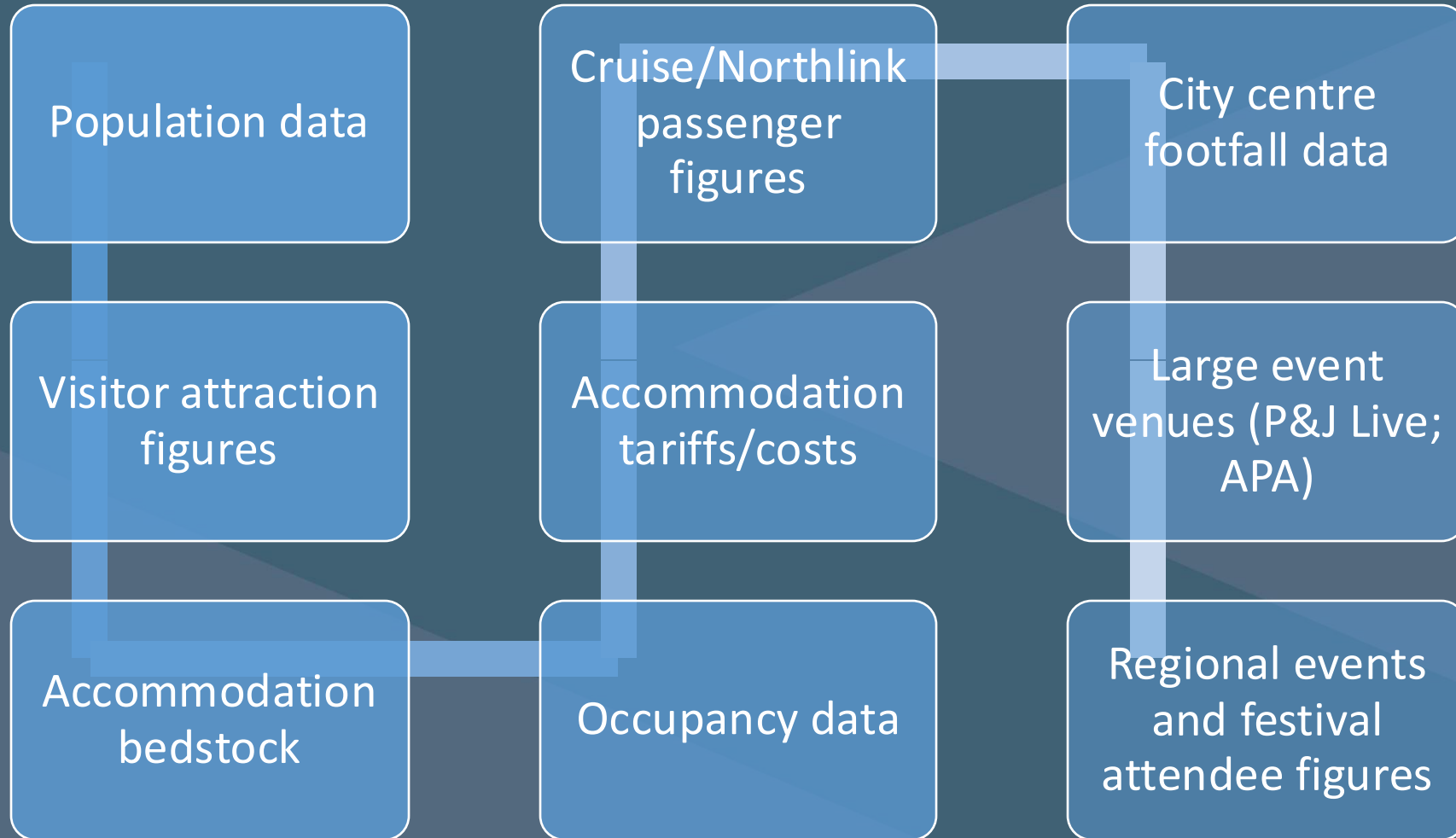
- Scottish Tourism Economic Activity Model
- Measures the volume and value of tourism
- Measures tourism from grass-roots up
- Multiple data sources (national & regional)
- Results inform Destination Strategy KPIs
- Used by many DMOs and Local Authorities across the UK

# Destination Strategy KPIs:

STEAM data feeds directly into the four economic impact KPIs



# STEAM inputs



Recap on regional headlines:  
*Aberdeen and Aberdeenshire  
combined*



# The 2025 regional headlines

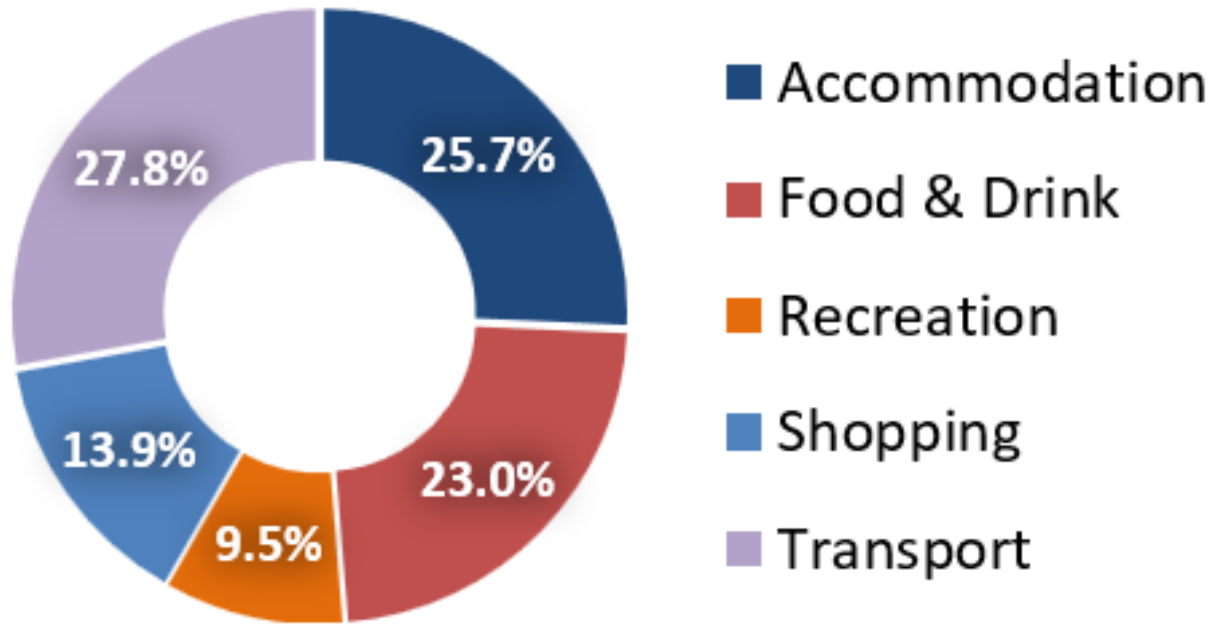
- Value of tourism: £1.37bn
- Directly sustains over 11,700 jobs
- Over 3.6 million *staying* visitors
- Almost 3.5 million *day* visitors
- Accommodation spend: £238m
- Food and drink spend: £213m



# How do these figures compare with 2024?

|                                     | 2025           | % change on 2024 |
|-------------------------------------|----------------|------------------|
| Staying visitors                    | 3,646,000      | -0.90%           |
| Day visitors                        | 3,448,000      | 33.4%            |
| Economic Impact                     | £1,375,000,000 | 4.50%            |
| Direct Full-time equivalents (FTEs) | 11,721         | +2.70%           |

# Breakdown of direct expenditure



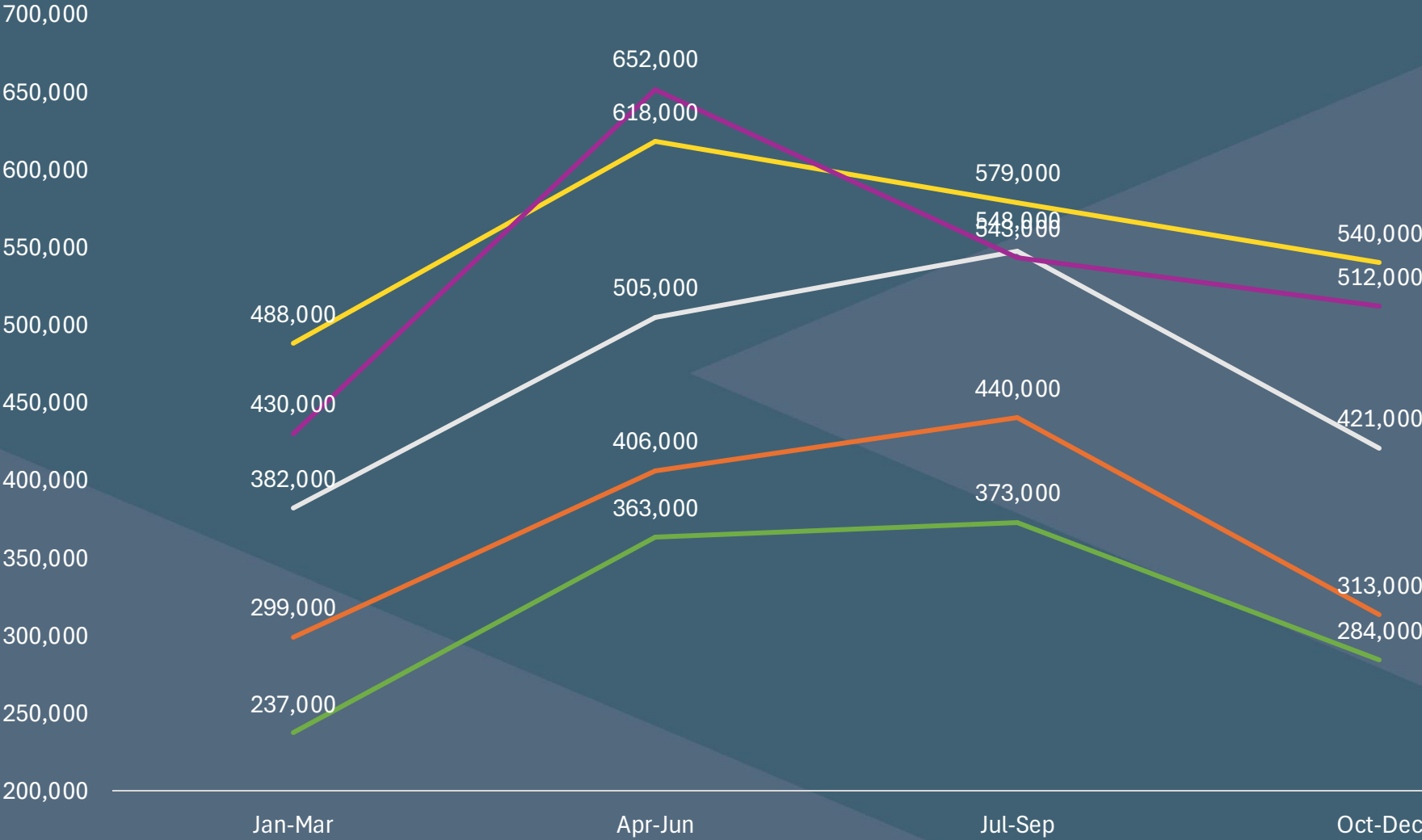
# City and Shire breakdown

|  | <b>CITY</b>          | <b>% SHARE</b> | <b>SHIRE</b>        | <b>% SHARE</b> |
|--|----------------------|----------------|---------------------|----------------|
| <b>Staying visitors</b>                    | 2,137,000 (-3.9%)    | 59%            | 1,508,000 (+3.9%)   | 41%            |
| <b>Day visitors</b>                        | 2,280,000 (+51.6%)   | 66%            | 1,169,000 (+8.1%)   | 34%            |
| <b>Economic Impact</b>                     | £821,330,000 (+5.5%) | 60%            | 554,170,000 (+3.1%) | 40%            |
| <b>Direct Full-time equivalents (FTEs)</b> | 6,050 (+5.8%)        | 52%            | 5,672 (-0.4%)       | 48%            |

# Aberdeen city visitor flow



# City Staying Visitors: Quarterly Spread



# City Staying Visitors: Monthly Spread



|      | Jan     | Feb     | Mar     | Apr     | May     | Jun     | Jul     | Aug     | Sep     | Oct     | Nov     | Dec     |
|------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| 2019 | 55,000  | 85,000  | 97,000  | 113,000 | 128,000 | 122,000 | 113,000 | 144,000 | 116,000 | 100,000 | 94,000  | 89,000  |
| 2022 | 67,000  | 119,000 | 113,000 | 152,000 | 123,000 | 131,000 | 143,000 | 150,000 | 147,000 | 123,000 | 100,000 | 90,000  |
| 2023 | 102,000 | 141,000 | 139,000 | 191,000 | 180,000 | 134,000 | 165,000 | 215,000 | 168,000 | 146,000 | 132,000 | 143,000 |
| 2024 | 100,000 | 186,000 | 203,000 | 167,000 | 227,000 | 224,000 | 196,000 | 236,000 | 146,000 | 188,000 | 156,000 | 196,000 |
| 2025 | 92,000  | 163,000 | 176,000 | 177,000 | 240,000 | 235,000 | 192,000 | 209,000 | 141,000 | 178,000 | 151,000 | 184,000 |

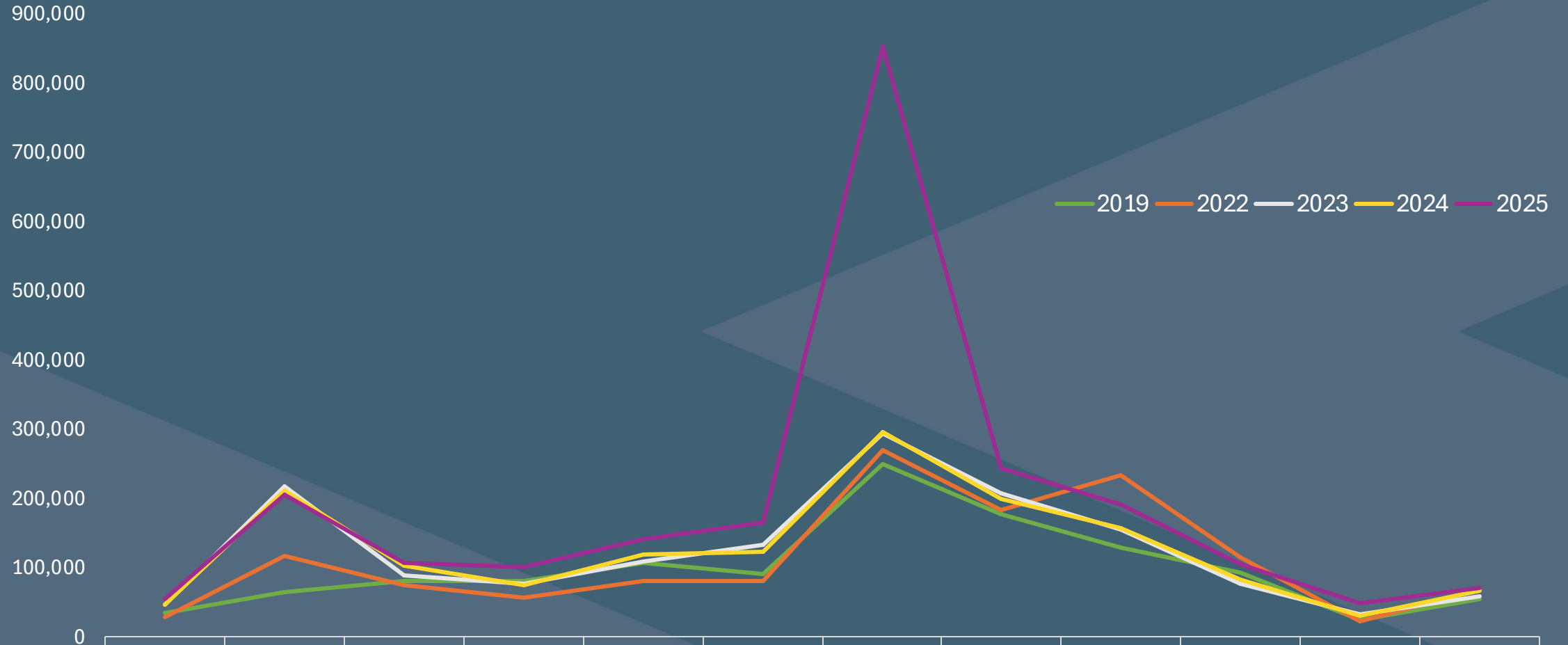
# City Day Visitors: Quarterly Spread

1,400,000  
1,200,000  
1,000,000  
800,000  
600,000  
400,000  
200,000  
0



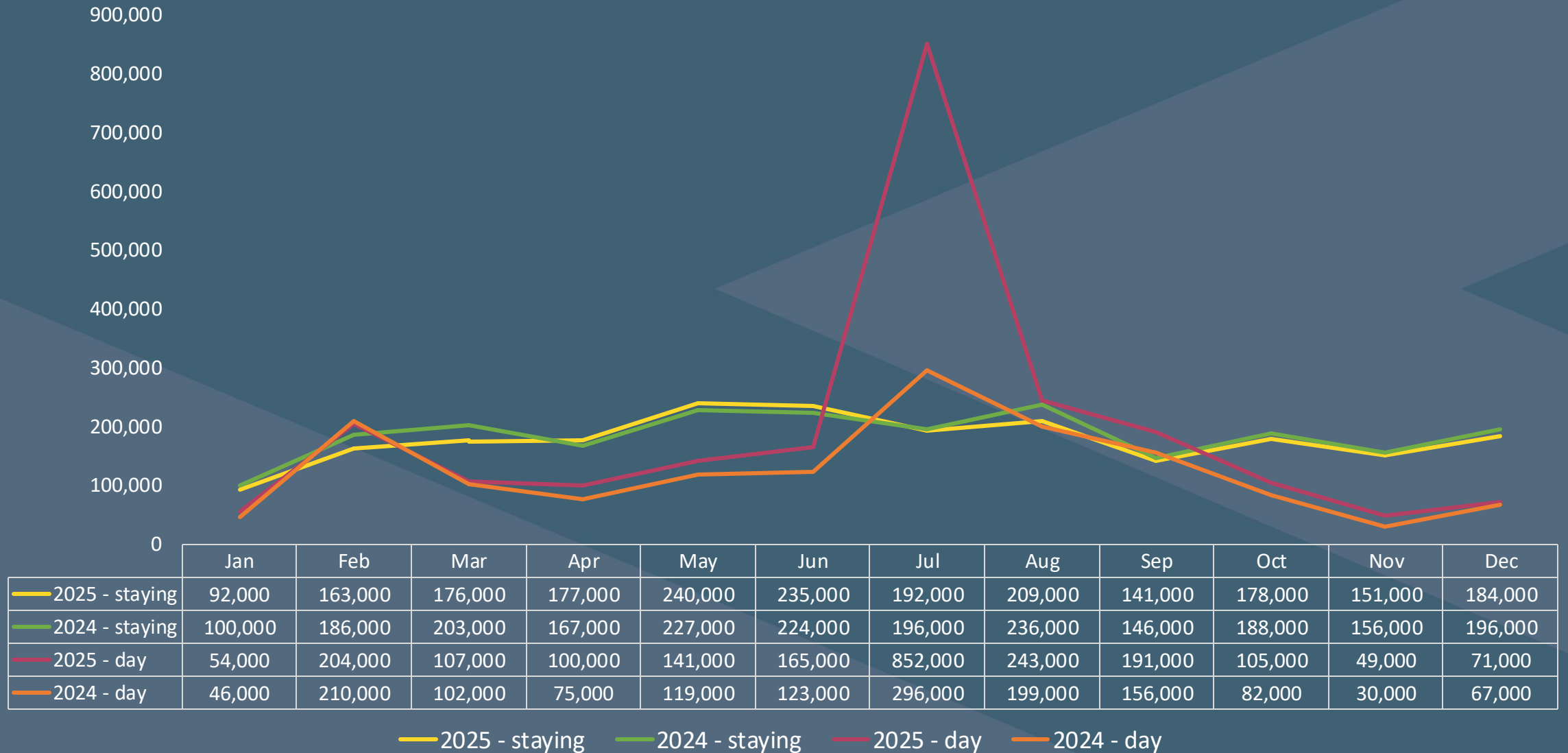
|      | Jan-Mar | Apr-Jun | Jul-Sep   | Oct-Dec |
|------|---------|---------|-----------|---------|
| 2019 | 178,000 | 278,000 | 556,000   | 170,000 |
| 2022 | 220,000 | 219,000 | 683,000   | 205,000 |
| 2023 | 352,000 | 317,000 | 654,000   | 166,000 |
| 2024 | 358,000 | 317,000 | 650,000   | 178,000 |
| 2025 | 364,000 | 405,000 | 1,285,000 | 225,000 |

# City Day Visitors: Monthly Spread



|      | Jan    | Feb     | Mar     | Apr     | May     | Jun     | Jul     | Aug     | Sep     | Oct     | Nov    | Dec    |
|------|--------|---------|---------|---------|---------|---------|---------|---------|---------|---------|--------|--------|
| 2019 | 34,000 | 64,000  | 81,000  | 81,000  | 106,000 | 91,000  | 250,000 | 177,000 | 128,000 | 92,000  | 24,000 | 55,000 |
| 2022 | 28,000 | 117,000 | 75,000  | 57,000  | 81,000  | 81,000  | 269,000 | 182,000 | 233,000 | 115,000 | 22,000 | 69,000 |
| 2023 | 46,000 | 218,000 | 88,000  | 76,000  | 108,000 | 133,000 | 294,000 | 206,000 | 154,000 | 76,000  | 31,000 | 59,000 |
| 2024 | 46,000 | 210,000 | 102,000 | 75,000  | 119,000 | 123,000 | 296,000 | 199,000 | 156,000 | 82,000  | 30,000 | 67,000 |
| 2025 | 54,000 | 204,000 | 107,000 | 100,000 | 141,000 | 165,000 | 852,000 | 243,000 | 191,000 | 105,000 | 49,000 | 71,000 |

# City Combined Visitor Patterns: 2024 & 2025



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