

Volume and Value of Tourism  
in the North-east 2025:  
*Focus on Aberdeenshire (excl. city)*

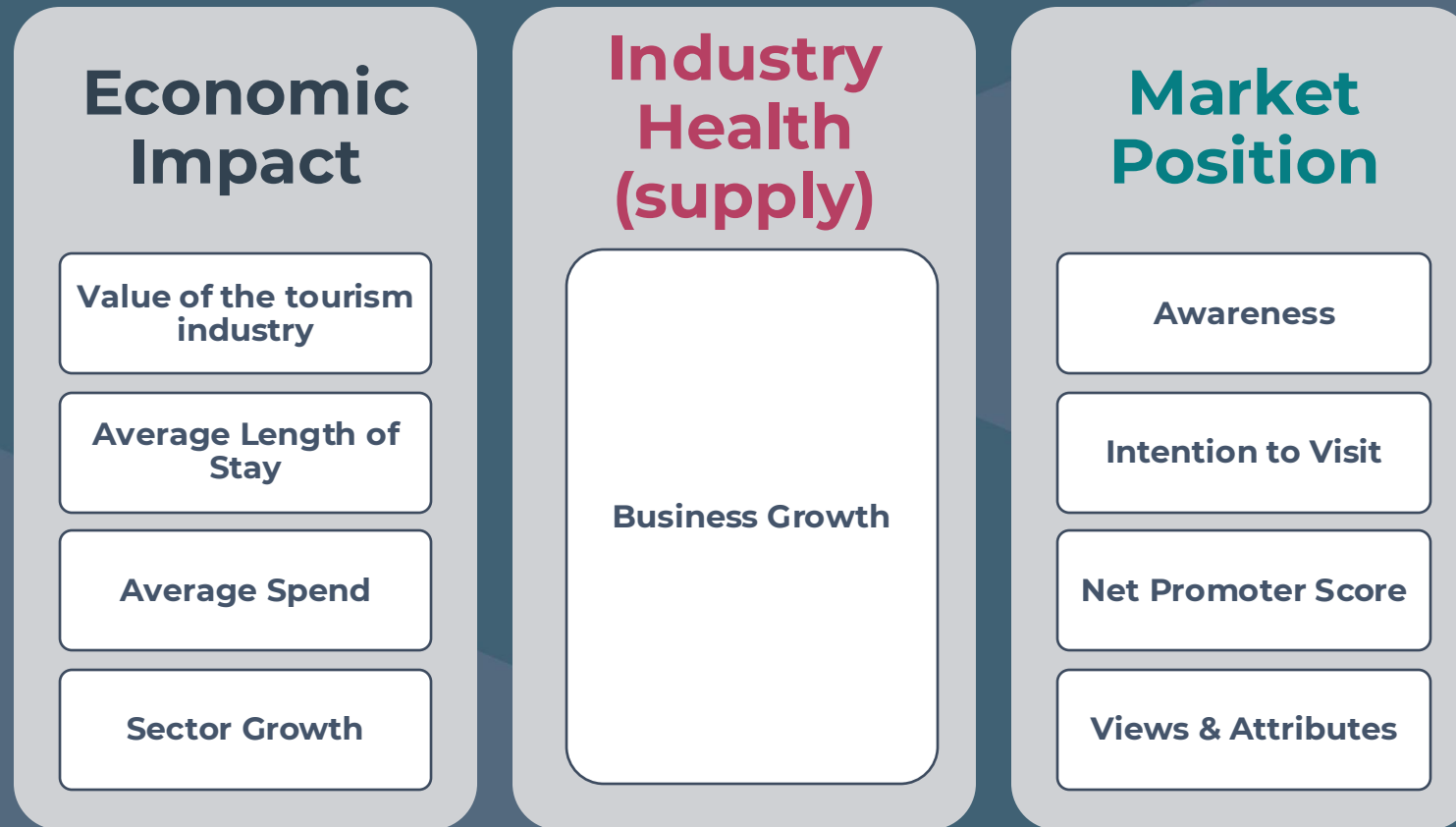


# What is “STEAM”

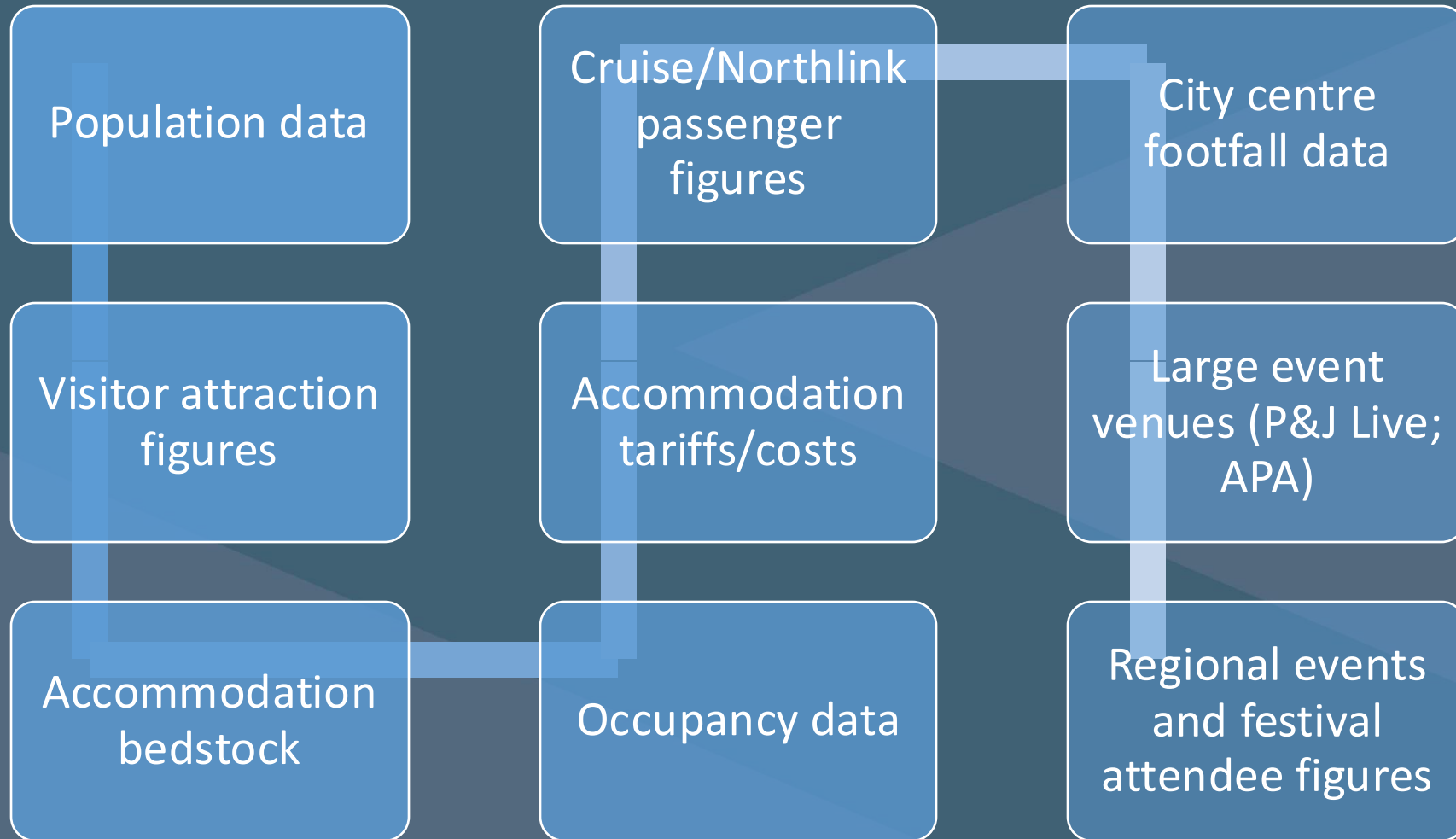
- Scottish Tourism Economic Activity Model
- Measures the volume and value of tourism
- Measures tourism from grass-roots up
- Multiple data sources (national & regional)
- Results inform Destination Strategy KPIs
- Used by many DMOs and Local Authorities across the UK

# 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

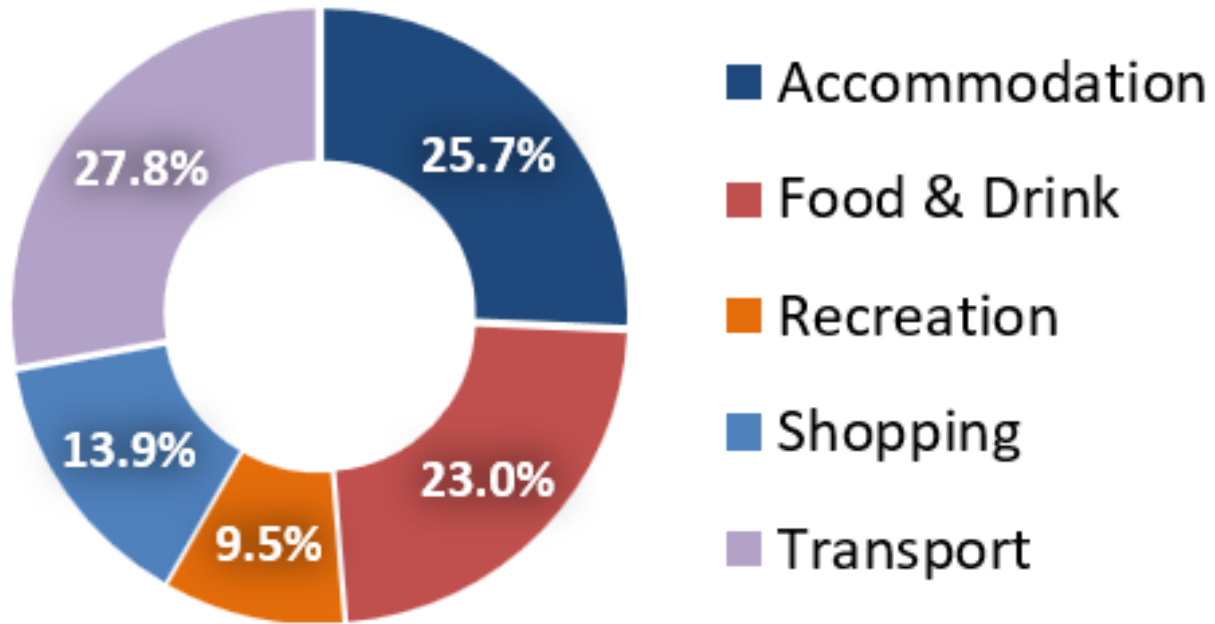
- Value of tourism: £1.37bn
- Directly sustains over 11,700 jobs
- Over 3.6 million *staying* visitors
- Almost 3.5 million *day* visitors
- Accommodation spend: £238m
- Food and drink spend: £213m



# 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



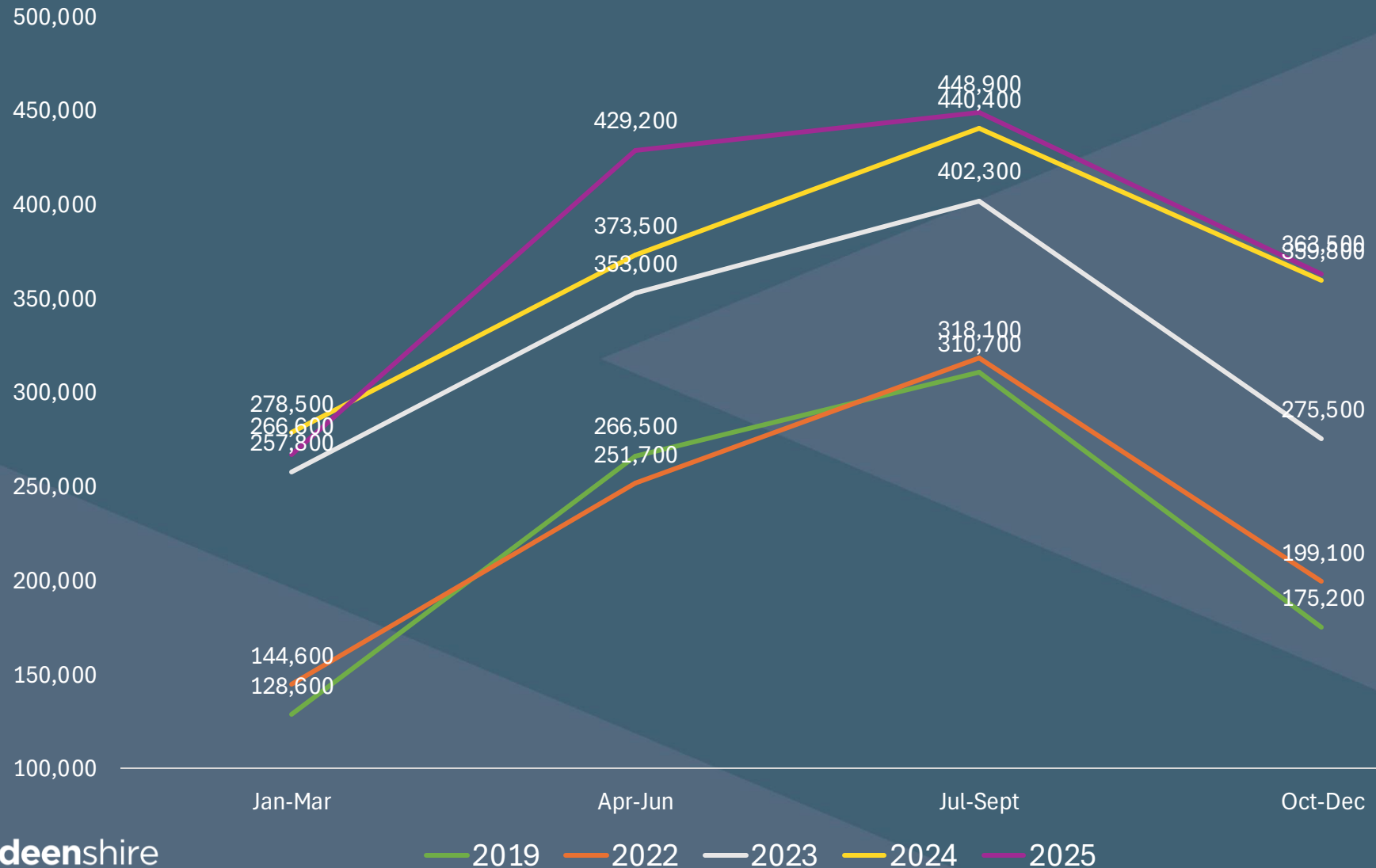
# City and Shire breakdown

	<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%

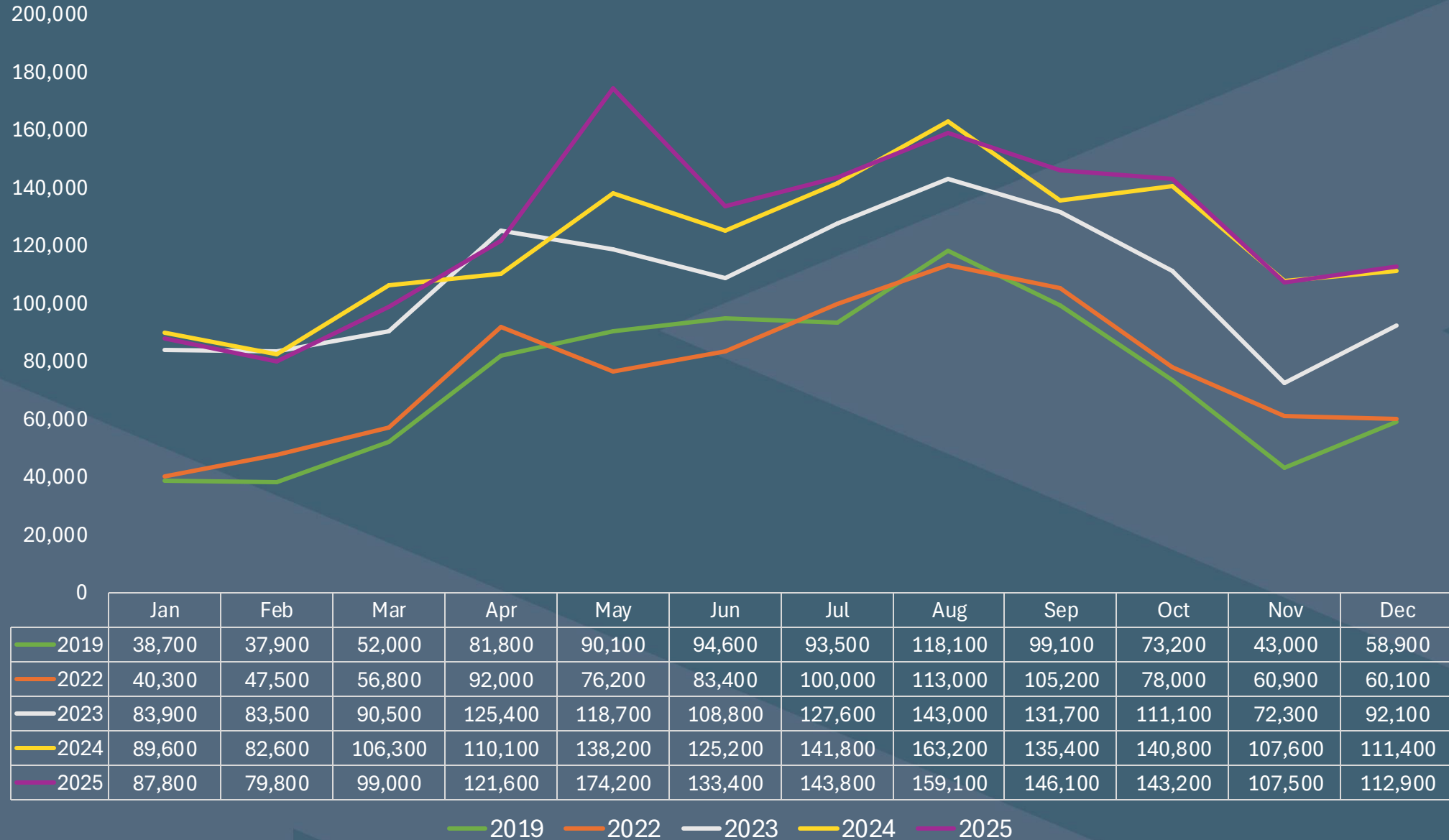
# Aberdeenshire visitor flow



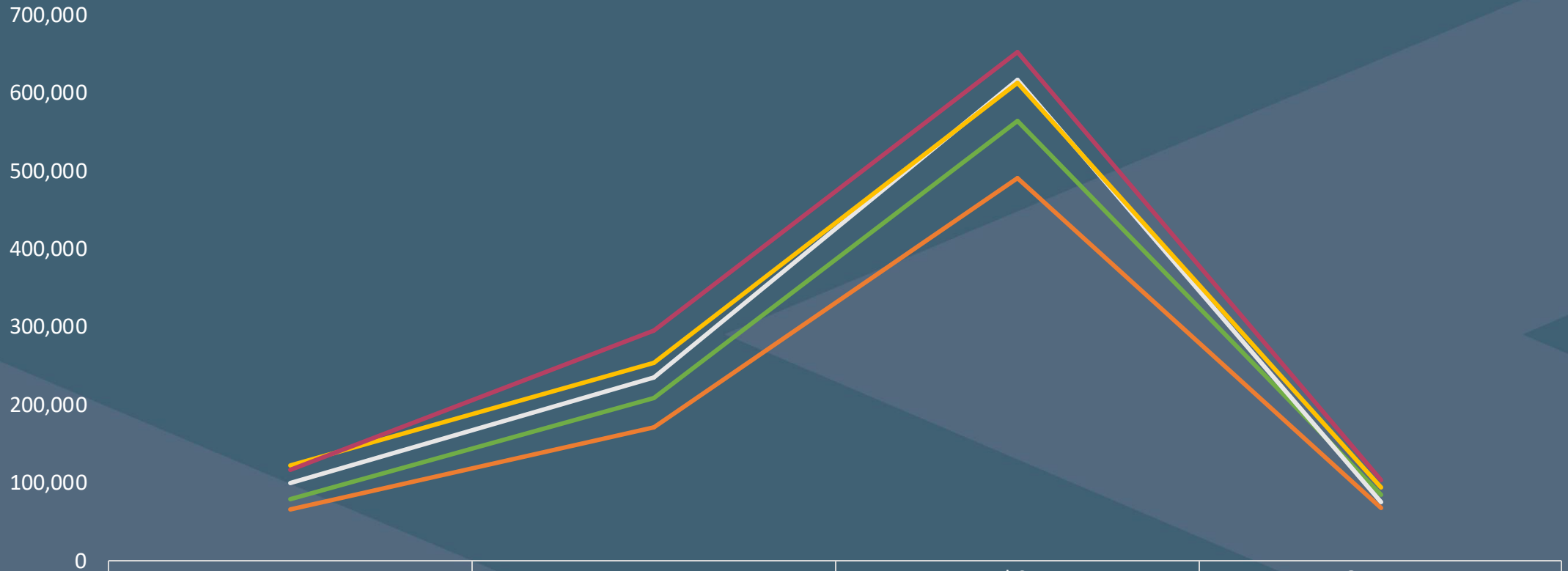
# Aberdeenshire Staying Visitors: Quarterly Spread



# Aberdeenshire Staying Visitors: Monthly Spread



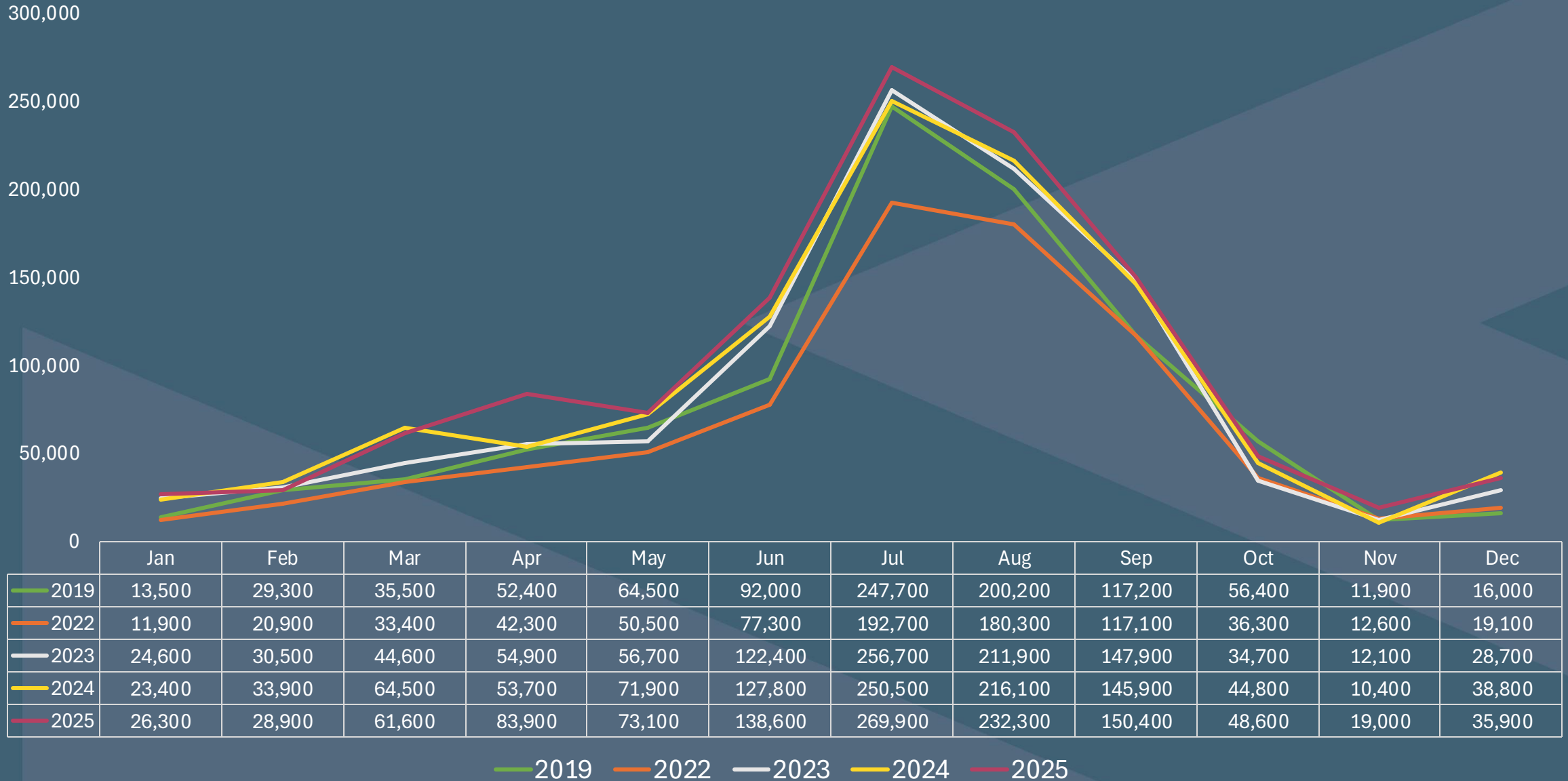
# Aberdeenshire Day Visitors: Quarterly Spread



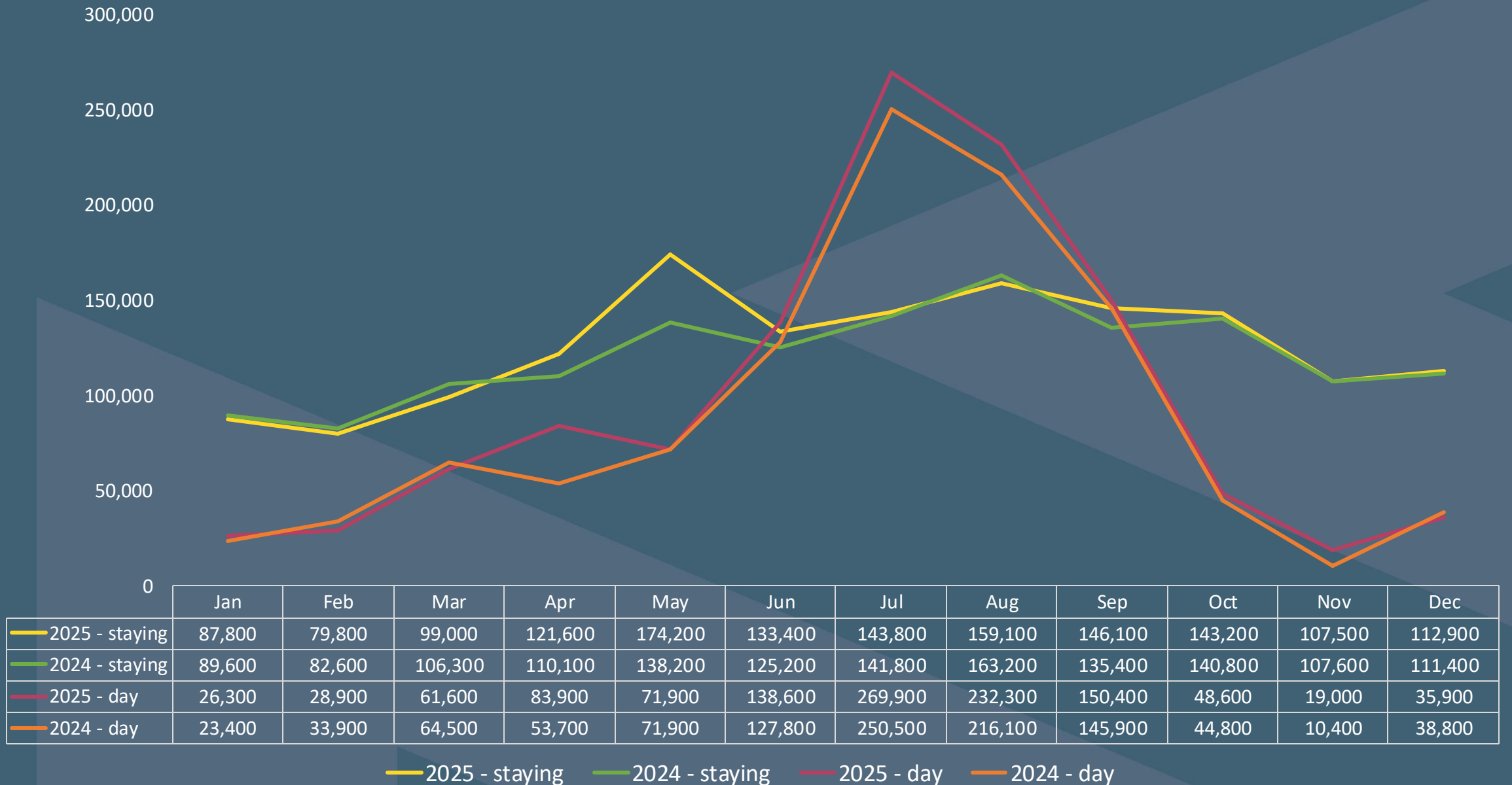
	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec
2019	78,300	208,900	565,100	84,300
2022	66,100	170,100	490,100	68,000
2023	99,800	234,000	616,500	75,500
2024	121,800	253,300	612,500	94,000
2025	116,800	295,700	652,600	103,600

— 2019 — 2022 — 2023 — 2024 — 2025

# Aberdeenshire Day Visitors: Monthly Spread



# Aberdeenshire Combined Visitor Patterns: 2024 & 2025



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