

VisitAberdeenshire Presents:
Latest regional insights



“STEAM”

Volume and Value of Tourism Project

What is “STEAM”

- **S**cottish **T**ourism **E**conomic **A**ctivity **M**odel
- Measures the volume and value of tourism
- Measures tourism from grass-roots up
- Relies on multiple data sources (national & regional)
- Results inform Destination Strategy KPIs
- Used by many DMOs and Local Authorities across UK

Destination Strategy KPIs: the wider context

Economic Impact

Value of the tourism industry

Average Length of Stay

Average Spend

Sector Growth

Industry Health (supply)

Business Growth

Market Position

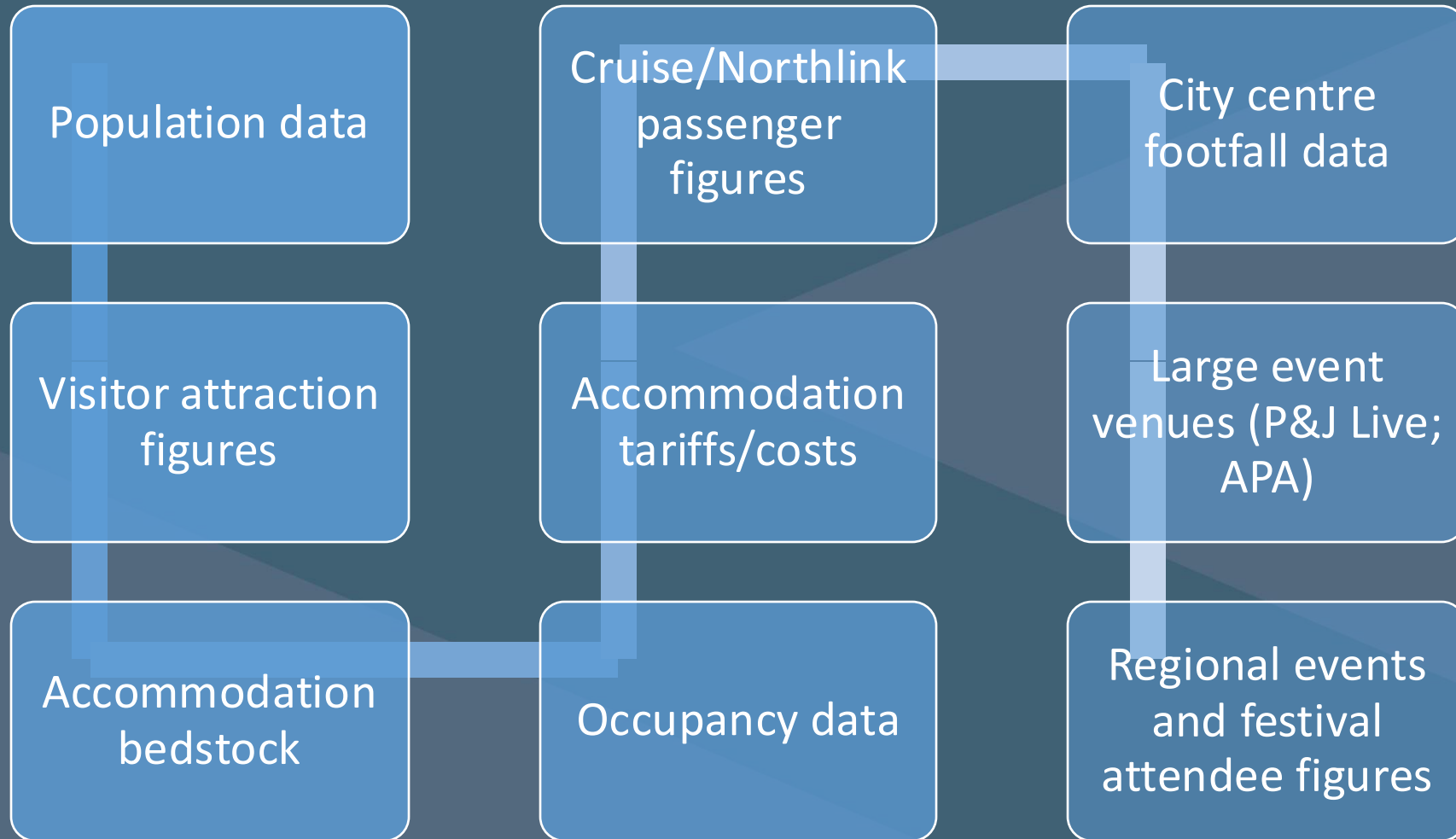
Awareness

Intention to Visit

Net Promoter Score

Views & Attributes

STEAM inputs



The 2025 Headlines

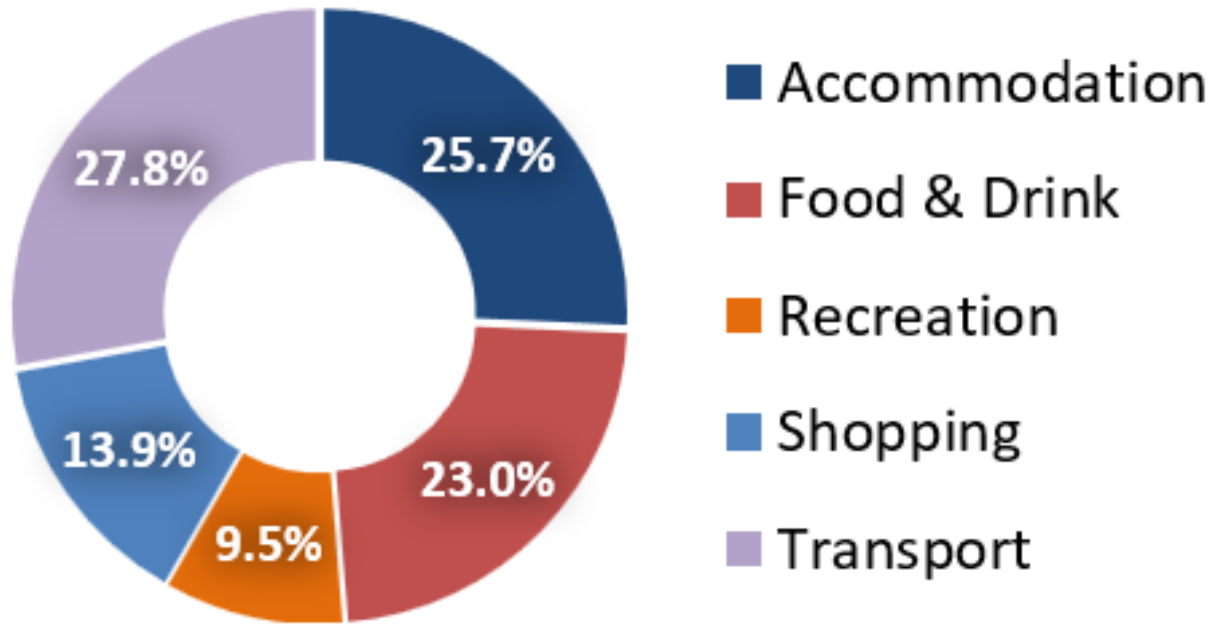
- Value of tourism: £1.37bn
- Directly sustained over 11,700 jobs
- Over 3.6 million *staying* visitors
- Almost 3.5 million *day* visitors
- Accommodation spend: £238m
- Food and drink spend: £213m



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%

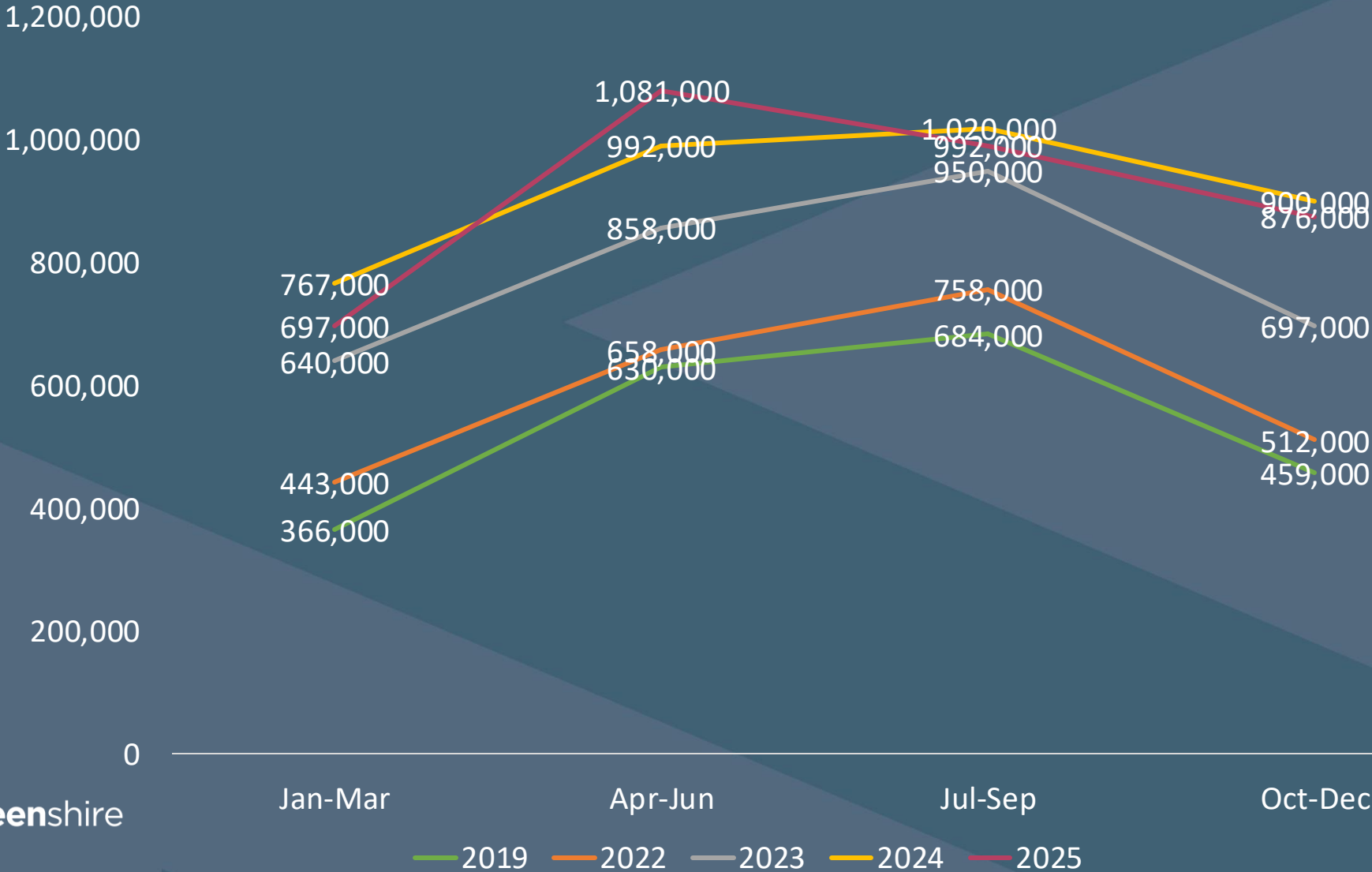
Breakdown of direct expenditure



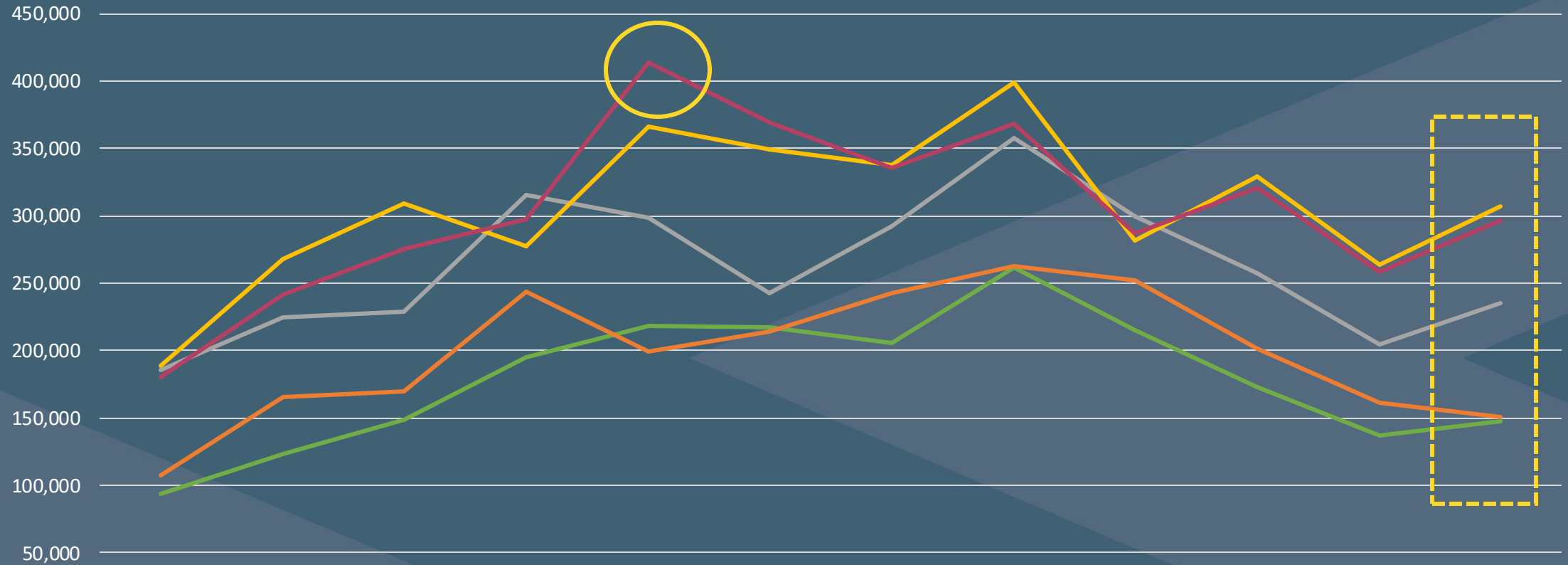
City and Shire breakdown

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

Quarterly Spread: Staying Visitors

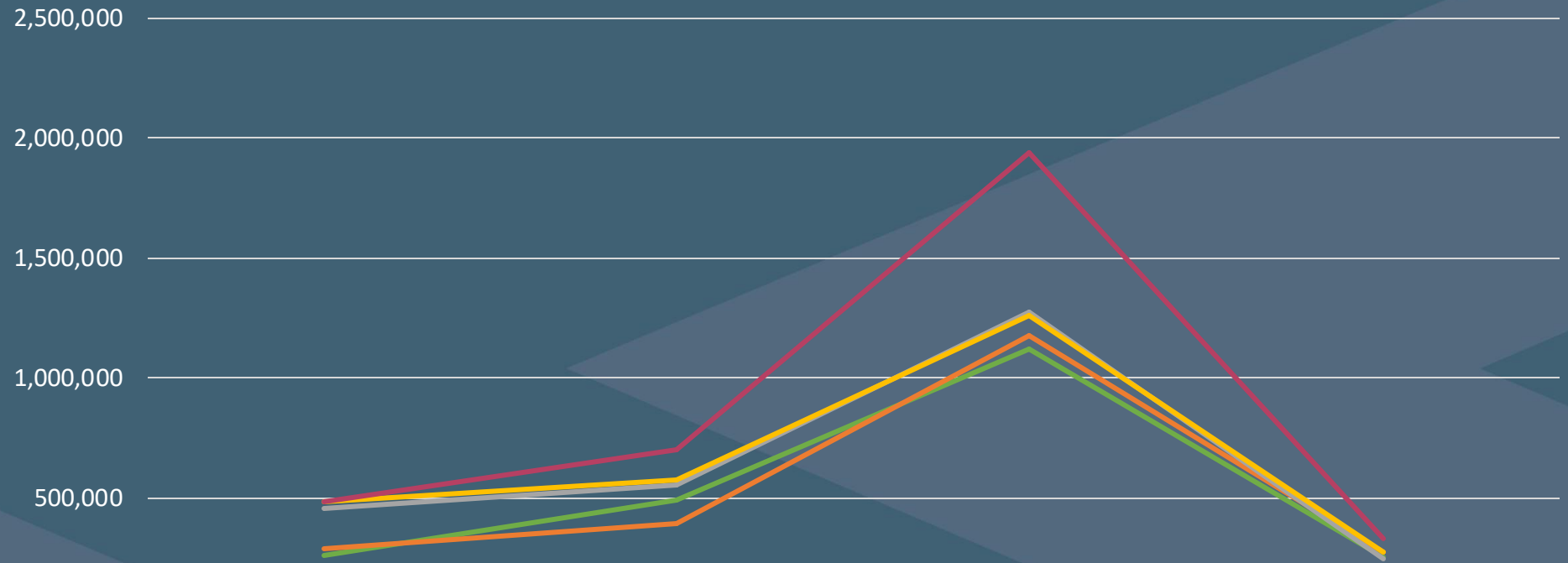


Monthly Spread: Staying Visitors



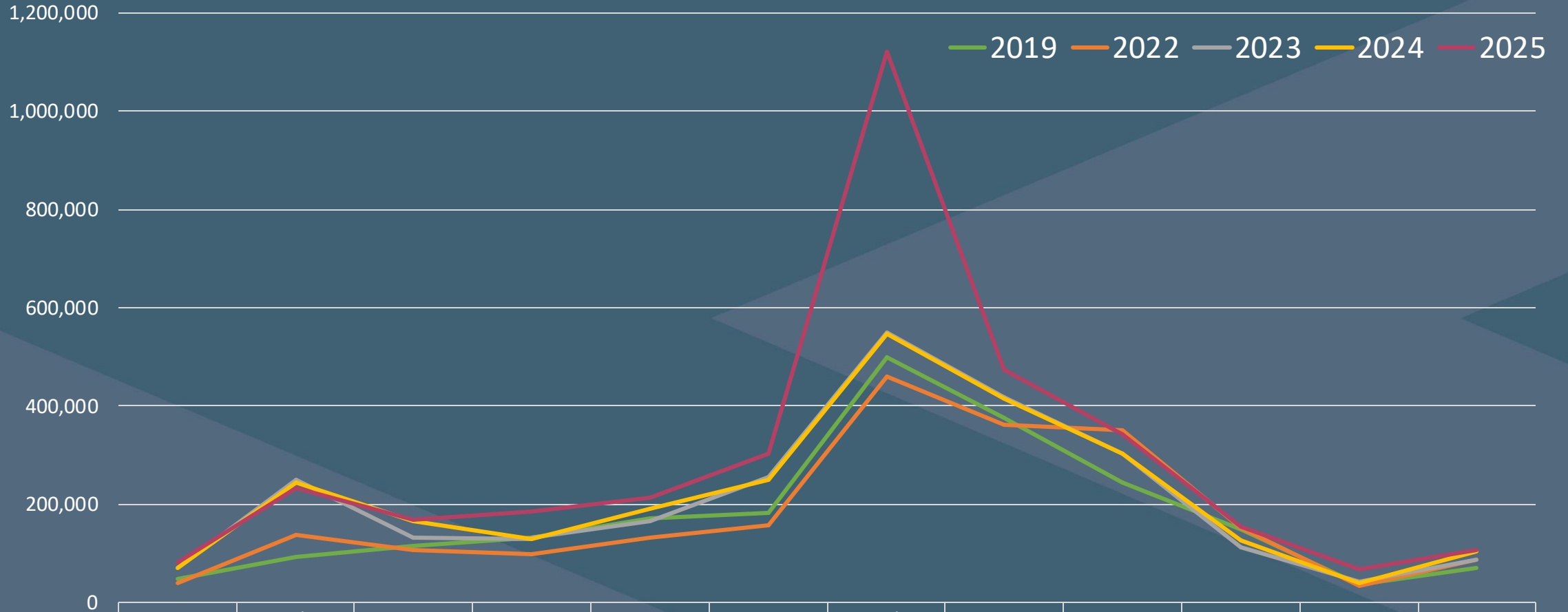
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	94,000	123,000	149,000	195,000	218,000	217,000	206,000	262,000	215,000	173,000	137,000	148,000
2022	107,000	166,000	170,000	244,000	199,000	214,000	243,000	263,000	252,000	201,000	161,000	151,000
2023	186,000	225,000	229,000	316,000	299,000	243,000	292,000	358,000	300,000	257,000	205,000	235,000
2024	189,000	268,000	309,000	277,000	366,000	349,000	338,000	399,000	282,000	329,000	264,000	307,000
2025	180,000	242,000	275,000	298,000	414,000	369,000	336,000	368,000	287,000	321,000	258,000	297,000

Quarterly Spread: Day Visitors



	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec
2019	257,000	487,000	1,121,000	254,000
2022	286,000	389,000	1,173,000	273,000
2023	452,000	551,000	1,271,000	242,000
2024	480,000	571,000	1,263,000	272,000
2025	481,000	701,000	1,938,000	328,000

Monthly Spread: Day Visitors



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	47,000	93,000	116,000	133,000	171,000	183,000	498,000	377,000	245,000	148,000	36,000	71,000
2022	40,000	138,000	108,000	99,000	131,000	158,000	461,000	362,000	350,000	151,000	34,000	88,000
2023	70,000	249,000	133,000	131,000	165,000	256,000	550,000	418,000	302,000	111,000	43,000	88,000
2024	70,000	244,000	166,000	128,000	191,000	251,000	546,000	415,000	302,000	127,000	40,000	105,000
2025	81,000	233,000	168,000	184,000	214,000	303,000	1,122,000	475,000	341,000	154,000	68,000	107,000

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