

## The Visitor Economy of Angus Council

This is a summary of the annual tourism economic impact research undertaken for Angus Council for the calendar year 2022. Outputs in this report have been generated using STEAM, the tourism specific economic impact model, owned and operated by Global Tourism Solutions (UK) Ltd.

COVID-19  
Pandemic

Some STEAM outputs for 2022 remain below the level of usual economic outputs for the area, due to the residual effects of the COVID-19 pandemic on business and consumer activity. Comparisons have been made to show performance levels against a pre-COVID-19 baselines.

2022

1.05m visits to  
Angus in 2022

.42m visits were made by visitors staying in Angus as part of a holiday or short break, generating 1.76m nights in local accommodation

2.39m Visitor Days and  
Nights Spent in Angus  
in 2022

Tourism visits  
to Angus  
supported  
3,612 full time  
equivalent  
jobs in 2022

On average,  
staying visitors  
spend 4.2  
nights, spending  
a total of £34m  
on local  
accommodation

.63m visits were made by day visitors  
to Angus

A total of £259m was  
generated within the local  
economy through visitor and  
tourism business expenditure

In some sectors, Angus' tourism activity  
is very close to, or above, pre-Covid  
2019 levels

Staying visitors  
to Angus  
generated a  
total economic  
value locally of  
£217m in 2022

Day visitors  
generated a  
total  
economic  
value locally  
of £42m in  
2022

Trends  
2021-2022

Economic Impact +45.7%

Visitor Numbers +89.5%

Visitor Days +54.3%

# 2022

## Visitor Types

**Staying Visitors** encompass all tourists staying overnight for at least one night in one of the following types of accommodation:

- **Serviced Accommodation** - including Hotels, Guest Houses, B&Bs, Inns
- **Non-Serviced Accommodation** – including Self-Catering properties such as Houses, Cottages, Chalets and Flats, as well as Camping and Caravanning, Hostels and University / College accommodation
- **Staying with Friends and Relatives (SFR)** – unpaid overnight accommodation with local residents

**Day Visitors** visiting the area on a non-routine and non-regular leisure day trip from a home or holiday base

**Staying Visitors**

**40%** of Visits

**Day Visitors**

**60%** of Visits

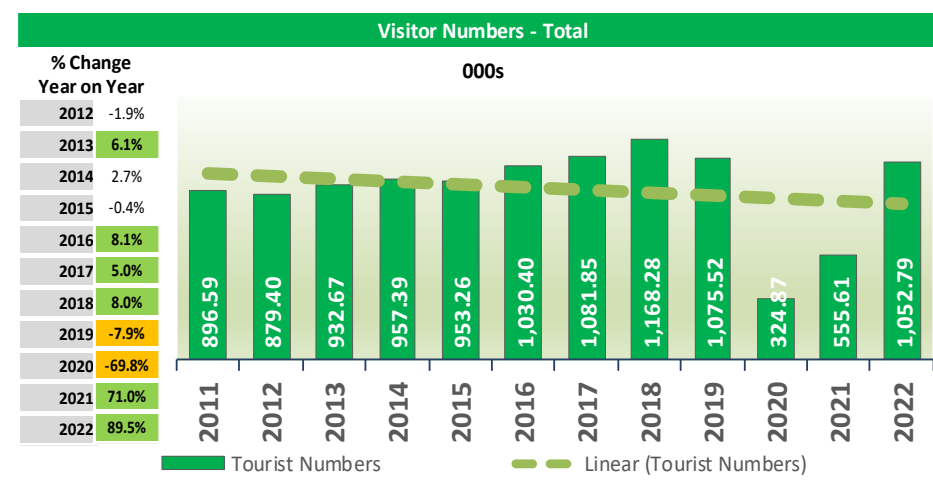
**Total  
Visitor  
Numbers  
1.053m**

## Visitor Numbers

There were an estimated 1.053m tourism visits to Angus in 2022, up substantially 89.5% on the previous year. Between 2010 and 2019 the area had seen the total number of visits rise by 20% to a total of 1.075m visits. The results from 2022 evidence a strong recovery from the height of the covid pandemic, total visitor numbers are now just fractionally (-2.1%) below 2019 pre-covid levels.

In 2022, .423m visitors stayed in some sort of accommodation within the area. This sector, as a whole, saw an increase of 45.9% compared to 2021, this continues the strong recovery we saw last year, and it is now just -7.1% below pre-covid

2019 figures. Serviced accommodation rose by 62.9% over the last year and is now 4.2% above pre-covid levels. The non-serviced accommodation sector continues to recover, gaining 24.3% last year, but is still below pre-covid levels by -19.9%. For the most part Angus' staying visitor numbers are approaching or have surpassed pre-covid levels, the day visitor sector has also recovered. It increased substantially by 137.2% in 2022, due in part to the 150<sup>th</sup> Open Golf tournament close by in St Andrews generating day visitors to Angus; the day visitor sector is now 1.6% above pre-covid levels.



## Key Figures: Visitor Numbers: 2022

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (Millions)	M	0.146	0.133	0.145	0.423	0.630	1.053
2021 (Millions)	M	0.090	0.107	0.094	0.290	0.265	0.556
Change 21/22 (%)	%	+62.9	+24.3	+54.2	+45.9	+137.2	+89.5
Share of Total (%)	%	13.9	12.6	13.7	40.2	59.8	100.0

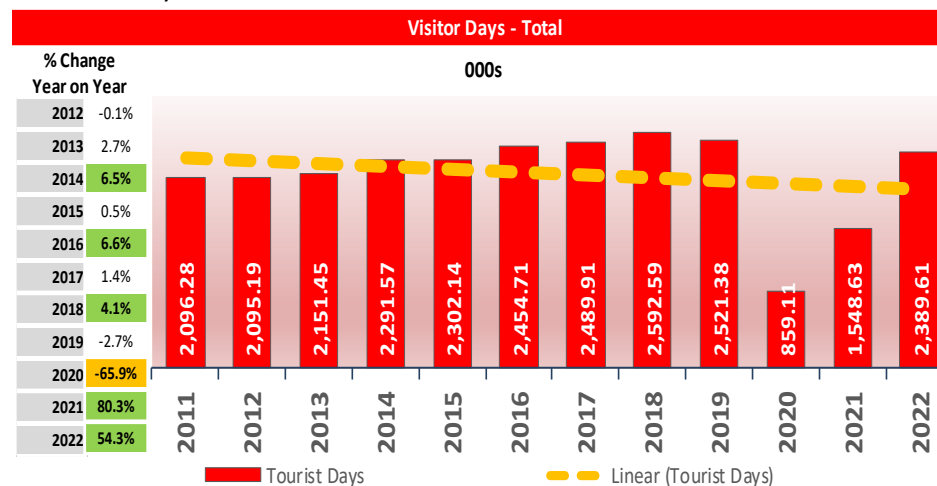
**Total  
Visitor  
Days  
2.39m**

## Visitor Days

Visitor days take into account those visitors who stay at any destination for more than a day. For example, if a family of five stay three nights, they will not only account for five visitors, but also fifteen visitor days.

Total staying visitors to Angus accounted for 2.39m visitor days in 2022, an increase of 54.3% on 2021 and they are now just -5.2% below pre-covid 2019 figures. The serviced accommodation sector saw a 59.6% increase when compared to 2021 and is now 10.1% above pre-covid figures reported in 2019. The non-serviced sector continues

to recover with an increase of 22.8% compared to 2021, but as with visitor numbers, it is still sitting below 2019 pre-covid levels at -16.2%. As with visitor numbers, day visitors have increased year-on-year since 2019, and by 137.2% since 2021, and are now 1.6% above pre-covid numbers. This is especially encouraging as day visitor numbers continue to lag behind other sectors in the majority of other local authority areas, a general pattern seen throughout the UK.



### Key Figures: Visitor Days: 2022

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (Millions)	M	0.339	0.765	0.657	1.760	0.630	2.390
2021 (Millions)	M	0.212	0.623	0.448	1.283	0.265	1.549
Change 21/22 (%)	%	+59.6	+22.8	+46.4	+37.2	+137.2	+54.3
Share of Total (%)	%	14.2	32.0	27.5	73.7	26.3	100.0

### Average length of stay in days for different visitor types to Angus in 2022

Day  
Visitors  
**1**

All  
Visitors  
**2.3**

Serviced  
Accommodation  
**2.3**

Non-Serviced  
Accommodation  
**5.8**

Staying with  
Friends/Relatives  
**4.5**

All Staying  
Visitors  
**4.2**

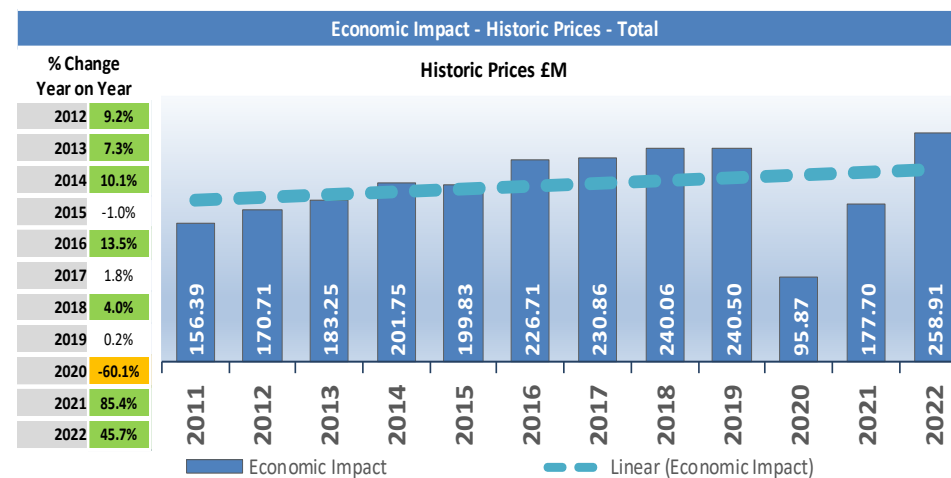
**Total  
Economic  
Impact  
£259m**

## Economic Impact

The value of tourism activity in Angus was estimated to be £259m in 2022 (an increase of 45.7% on the previous year). In comparison, the area's visitor economy was worth £240m in 2019, so the economic impact of tourism has surpassed pre-covid levels (by 7.7%) for the first time since the pandemic affected tourism activity.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £186m. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £73m. The largest

visitor spending sector was Transport (£49m), closely followed by Food & Drink (£45m), and Shopping (£43m). In 2022, the area's day visitor market accounted for 16% of the value of tourism activity (£41.6m), 11.7% above pre-covid economic activity. Meanwhile, the staying visitor market accounted for the remaining 84% of economic value (£217m) and as such has surpassed pre-covid levels by 6.9%, with the serviced sector already 25.3% above pre-covid levels.



### Key Figures: Economic Impact: 2022

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2022 (£ Millions)	£M	51.478	109.030	56.802	217.310	41.597	258.906
2021 (£ Millions)	£M	33.100	87.969	40.575	161.644	16.060	177.704
Change 21/22 (%)	%	+55.5	+23.9	+40.0	+34.4	+159.0	+45.7
Share of Total (%)	%	19.9	42.1	21.9	83.9	16.1	100.0

### Average economic impact generated per person by each type of visitor to Angus in 2022

**Day  
Visitors**  
£66 per  
Day

**Staying with Friends  
and Relatives**  
£86 per Day  
£392 per Visit

**All  
Visitors**  
£108 per Day  
£246 per Visit

**Non-Serviced  
Accommodation**  
£143 per Day  
£821 per Visit

**All Staying  
Visitors**  
£123 per Day  
£513 per Visit

**Serviced  
Accommodation**  
£152 per Day  
£353 per Visit

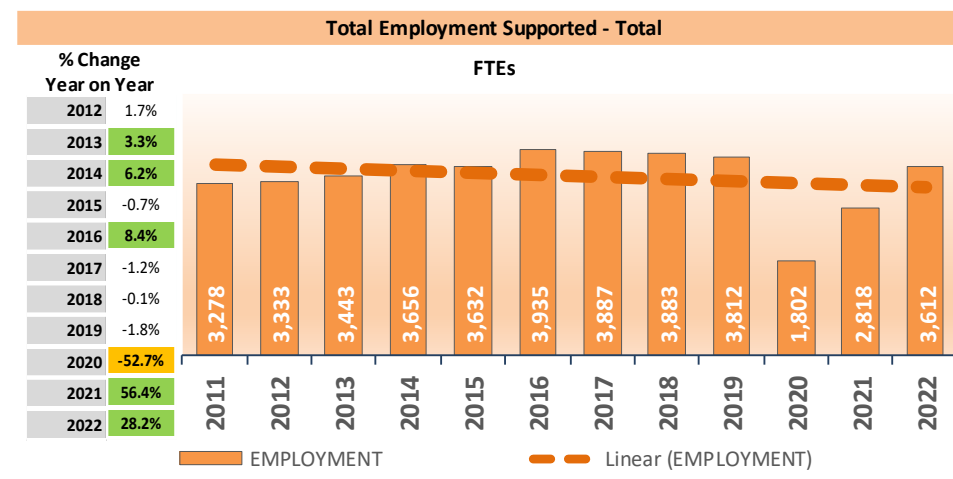
**Total  
FTEs  
Supported  
3,612**

## Employment Supported by Tourism

The expenditure and activity of visitors to Angus supported a total of 3,612 Full-Time Equivalent jobs (FTEs) in 2022, up by 28.2% when compared to 2021, but still slightly down by - 5.2% when compared to 2019 pre-covid levels, when employment was estimated to have been 3,812 FTEs. Nationally, there have been many reports of businesses facing challenges in job recruitment and retention, with evidence to suggest that this was serving to reduce

operating capacities in some cases.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 2,652 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 960 FTEs.



### Key Figures: Employment: 2022

Employment Supported by Sector 2022	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	£33.69m	£45.20m	£13.60m	£43.38m	£49.81m	£185.69m	£73.22m	£258.91m

### Definitions:

- **Accommodation:** Payments for overnight stays in accommodation, such as room rates for serviced accommodation, or pitch fees and hire charges for non-serviced accommodation.
- **Recreation:** Covering expenditure on a wide range of leisure activities such as museum, event, concert / theatre and attractions attendance as well as sports participation and spectating.
- **Transport:** Expenditure within the destination on travel, including fuel and public transport tickets.
- **Food and Drink:** Spend on eating and drinking at restaurants, cafes and other venues, takeaway food, snacks and groceries.
- **Shopping:** What visitors spend on items including clothing / jewellery, household items, music / films / games, gifts and smaller items, books and maps, plants and garden items.
- **Indirect:** The expenditure by local tourism businesses within the local supply chain.



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2023

# STEAM Comparative Headlines: 2021 and 2022

STEAM REPORT FOR 2011-2022 - FINAL

ANGUS COUNCIL

Comparing 2022 and 2021

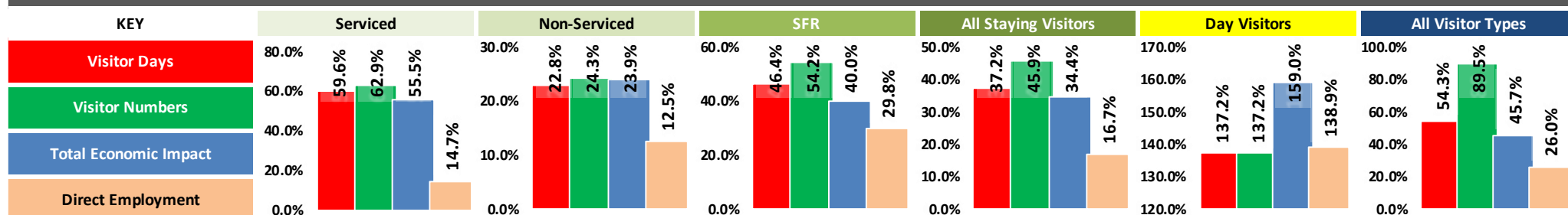
All £'s Historic Prices

COMPARATIVE HEADLINES

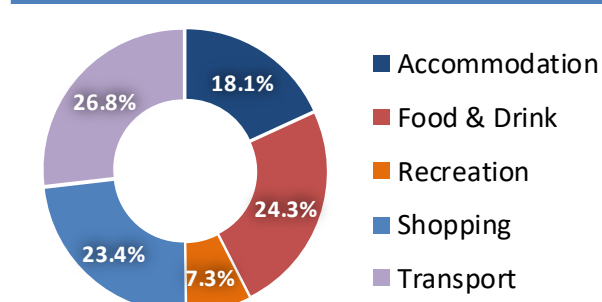
## KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2022 & 2021 - IN HISTORIC PRICES

KEY																			
An increase of 3% or more		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
Less than 3% change		Serviced			Non-Serviced														
A Fall of 3% or more		2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %	2022	2021	+/- %
Visitor Days	M	0.339	0.212	59.6%	0.765	0.623	22.8%	0.657	0.448	46.4%	1.760	1.283	37.2%	0.630	0.265	137.2%	2.390	1.549	54.3%
Visitor Numbers	M	0.146	0.090	62.9%	0.133	0.107	24.3%	0.145	0.094	54.2%	0.423	0.290	45.9%	0.630	0.265	137.2%	1.053	0.556	89.5%
Direct Expenditure	£M																185.69	127.28	45.9%
Economic Impact	£M	51.48	33.10	55.5%	109.03	87.97	23.9%	56.80	40.58	40.0%	217.31	161.64	34.4%	41.60	16.06	159.0%	258.91	177.70	45.7%
Direct Employment	FTEs	686	598	14.7%	1,064	946	12.5%	519	400	29.8%	2,269	1,944	16.7%	383	160	138.9%	2,652	2,104	26.0%
Total Employment	FTEs																3,612	2,818	28.2%

## PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2022 & 2021 - IN HISTORIC PRICES



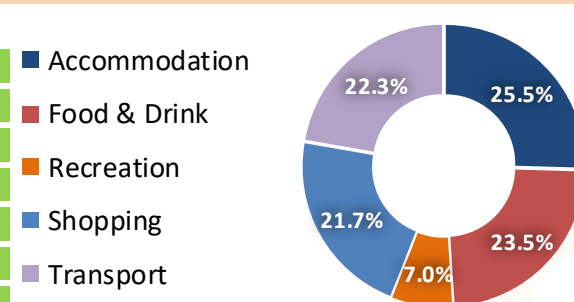
## Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices



Direct Expenditure Categories

2022	2021	+/- %	Sectors	2022	2021	+/- %
33.69	22.54	49.5%	Accommodation	675	634	6.6%
45.20	30.41	48.7%	Food & Drink	624	453	37.7%
13.60	8.969	51.6%	Recreation	186	133	40.4%
43.38	31.09	39.5%	Shopping	576	446	29.2%
49.81	34.28	45.3%	Transport	590	439	34.6%
185.69	127.28	45.9%	TOTAL DIRECT	2,652	2,104	26.0%
73.22	50.42	45.2%	Indirect	960	714	34.5%
258.91	177.70	45.7%	TOTAL	3,612	2,818	28.2%

## Sectoral Distribution of Employment - FTEs



Direct Employment Categories



# STEAM Comparative Headlines: 2019 and 2022 Covid Recovery

STEAM REPORT FOR 2011-2022 - FINAL

ANGUS COUNCIL

Comparing 2022 and 2019

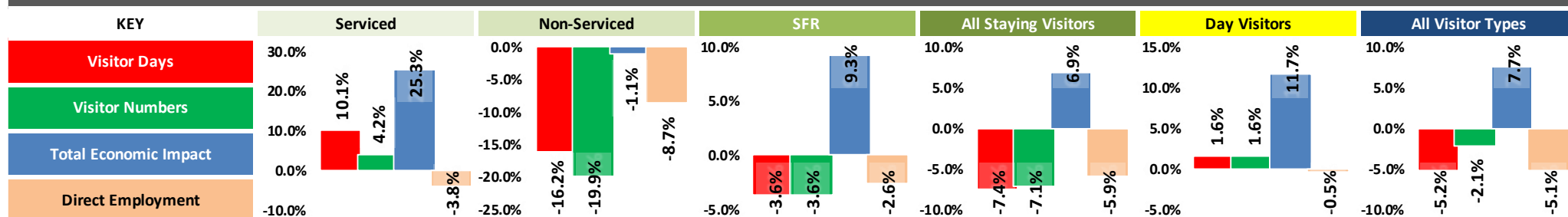
All £'s Historic Prices

COMPARATIVE HEADLINES

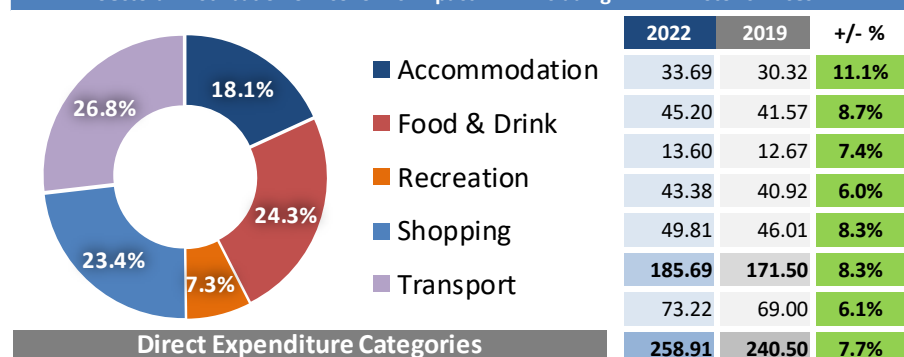
## KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2022 & 2019 - IN HISTORIC PRICES

KEY																			
An increase of 3% or more		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
Less than 3% change		Serviced			Non-Serviced														
A Fall of 3% or more		2022	2019	+/- %	2022	2019	+/- %	2022	2019	+/- %	2022	2019	+/- %	2022	2019	+/- %	2022	2019	+/- %
Visitor Days	M	0.339	0.308	10.1%	0.765	0.912	-16.2%	0.657	0.681	-3.6%	1.760	1.902	-7.4%	0.630	0.620	1.6%	2.390	2.521	-5.2%
Visitor Numbers	M	0.146	0.140	4.2%	0.133	0.166	-19.9%	0.145	0.150	-3.6%	0.423	0.456	-7.1%	0.630	0.620	1.6%	1.053	1.076	-2.1%
Direct Expenditure	£M																185.69	171.50	8.3%
Economic Impact	£M	51.48	41.08	25.3%	109.03	110.22	-1.1%	56.80	51.97	9.3%	217.31	203.27	6.9%	41.60	37.23	11.7%	258.91	240.50	7.7%
Direct Employment	FTEs	686	714	-3.8%	1,064	1,165	-8.7%	519	533	-2.6%	2,269	2,411	-5.9%	383	385	-0.5%	2,652	2,796	-5.1%
Total Employment	FTEs																3,612	3,812	-5.2%

## PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2022 & 2019 - IN HISTORIC PRICES



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



## Sectoral Distribution of Employment - FTEs

