

## The Visitor Economy of Angus

This is a summary of the annual tourism economic impact research undertaken for Angus Council for the calendar years 2012-2023. 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 2023 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.



# 2023

## 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**

**39%** of Visits

**Day Visitors**

**61%** of Visits

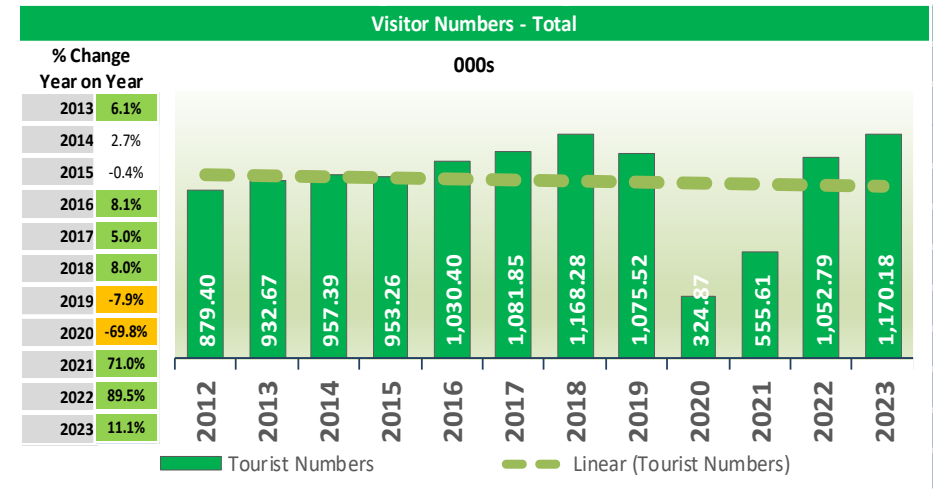
**Total Visitor Numbers**  
**1.2m**

## Visitor Numbers

There were an estimated 1.2m tourism visits to Angus in 2023, up by 11.1% from the previous year, and also up 8.8% from estimated pre-covid levels reported in 2019, mainly due to the serviced accommodation sector and day visitor numbers.

In 2023, .458m visitors stayed in some sort of accommodation within the area. This sector saw a small increase of 8.3% when compared to the previous year and is now 0.5% above pre-covid levels. The serviced accommodation sector, primarily comprised of hotels, guest houses and B&Bs, also saw an increase of 9.9% over the last year and is now above 2019 pre-covid levels by 14.5%.

The larger non-serviced accommodation sector continues to recover steadily and although up by 16.6% on the previous year, it still -6.6% below 2019 pre-covid levels. Day visitors throughout many locations in the UK are still well below pre-covid levels, especially in rural and semi-rural locations, so it is encouraging to see that day visitors were up significantly by 13.1% on the previous year, and are now 14.9% above pre-covid estimates, which has had a positive knock-on effect on total numbers as a whole, as day visitors represent 61% of visitor numbers to the area.



## Key Figures: Visitor Numbers 2023

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (Millions)	M	0.160	0.155	0.143	0.458	0.712	1.170
2022 (Millions)	M	0.146	0.133	0.145	0.423	0.630	1.053
Change 22/23 (%)	%	+9.9	+16.6	-0.9	+8.3	+13.1	+11.1
Share of Total (%)	%	13.7	13.2	12.2	39.2	60.8	100.0

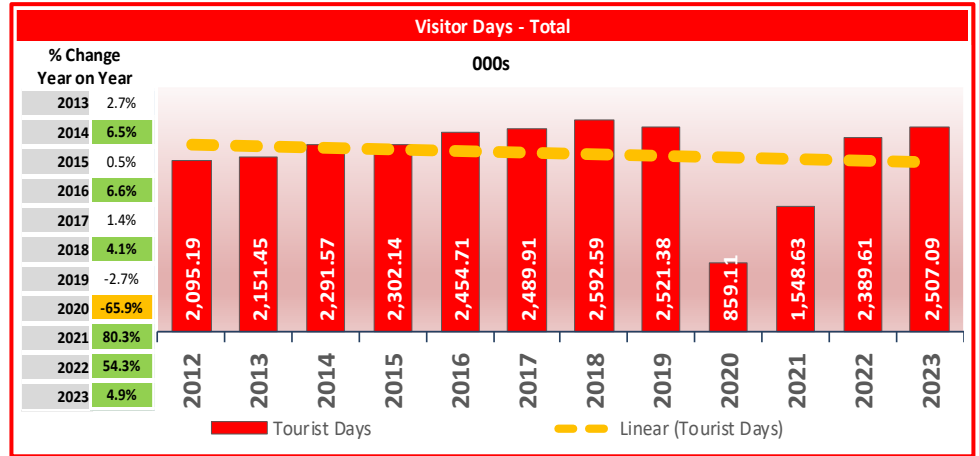
**Total  
Visitor  
Days  
2.5m**

## Visitor Days

Visitors spent an estimated 2.5m days in Angus during 2023. Visitor days take into account multiple stays. For example, if a family of five stay three nights, they will not only account for five visitors, but also fifteen visitor days. On average, staying visitors to the area stay 3.9 days.

Total staying visitors accounted for 1.8m visitor days in 2023, an increase of 2.0% on the previous year, and just -5.6% below 2019 pre-covid levels. The serviced accommodation sector decreased by -10.3% when

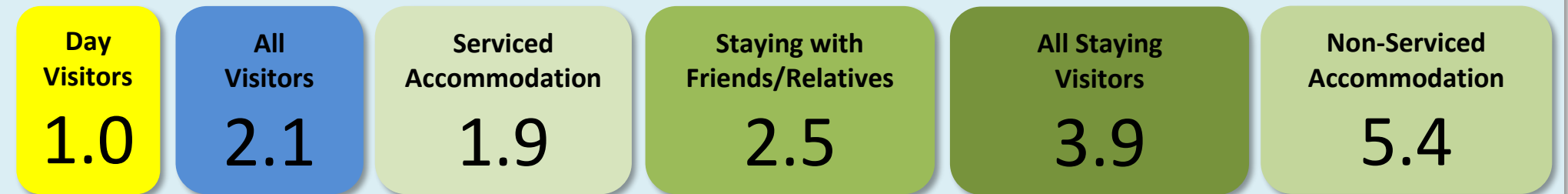
compared to 2022 and is now just -1.3% below pre-covid figures reported in 2019. In contrast, the larger non-serviced accommodation sector is up by 9.8% on the previous year, but as with serviced accommodation, is still below pre-covid 2019 levels, by -8.0%, which points to the non-serviced sector recovering slightly behind the serviced sector but performing well over the past year. As mentioned before, day visitors to Angus are up by 13.1% on the previous year and at 14.9% above pre-covid levels, they are bucking the slow recovery trend typically seen across the UK.



### Key Figures: Visitor Days 2023

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (Millions)	M	0.304	0.840	0.652	1.795	0.712	2.507
2022 (Millions)	M	0.339	0.765	0.657	1.760	0.630	2.390
Change 22/23 (%)	%	-10.3	+9.8	-0.7	+2.0	+13.1	+4.9
Share of Total (%)	%	12.1	33.5	26.0	71.6	28.4	100.0

### Average Length of Stay for Different Visitor Types: 2023



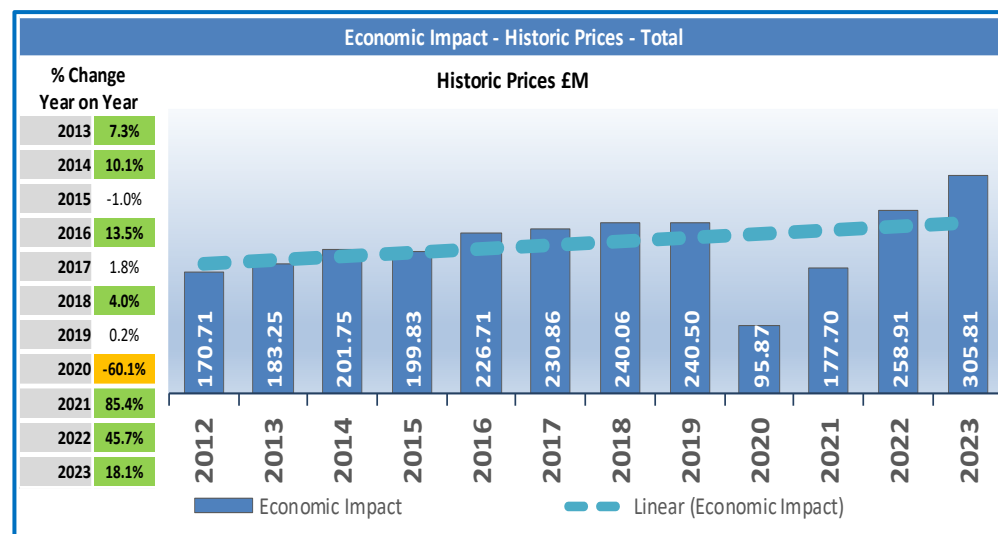
**Total  
Economic  
Impact  
£306m**

## Economic Impact

The value of tourism activity in Angus was estimated to be £306m in 2023, up by 18.1% on the previous year, and up by 27.2% when compared to pre-covid levels.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £218m. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £88m, together totalling £306m. The

largest visitor spending sector was Transport (£57m), then Food & Drink (£53m), followed closely by Shopping (£50m). The economic impact of the serviced sector was up 2.5% on the previous year and is now 28.4% up on estimated 2019 pre-covid levels. The larger non-serviced accommodation sector, comprising self-catering and some caravan, camping and touring sites, was up significantly by 23.5% on 2022, and since 2019 has increased by 22.1%. In terms of comparison, the non-serviced sector has over four times the bedspaces of the serviced sector and has around 2.5 times the economic impact. Day visitor economic impact is up 29.3% on the previous year, and is now 44.4% above 2019 pre-covid levels, and has a very similar economic impact as the serviced sector does.



- Accommodation:** Payments for overnight stays in accommodation, such as room rates, 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

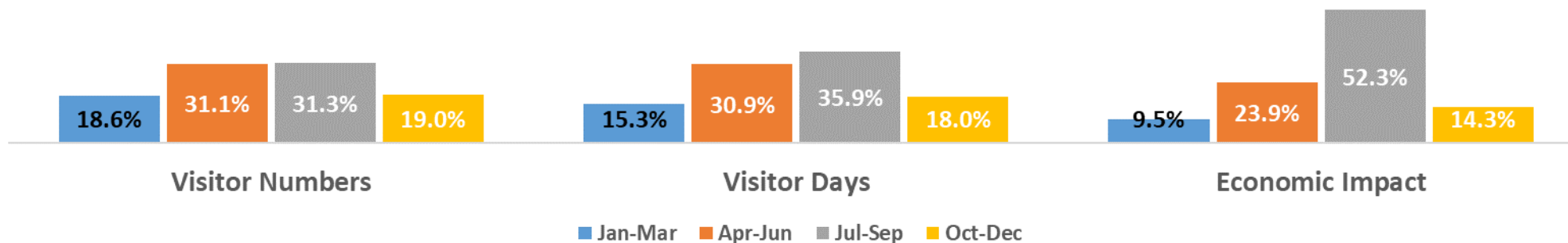
### Key Figures: Economic Impact 2023

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2023 (£ Millions)	£M	52.744	134.624	64.672	252.040	53.770	305.810
2022 (£ Millions)	£M	51.478	109.030	56.802	217.310	41.597	258.906
Change 22/23 (%)	%	+2.5	+23.5	+13.9	+16.0	+29.3	+18.1
Share of Total (%)	%	17.2	44.0	21.1	82.4	17.6	100.0

### Average Economic Impact Generated by Each Type of Visitor: 2023

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	£151.96	£142.58	£86.51	£123.47	£66.08	£108.35
Economic Impact per Visit	£352.93	£821.07	£392.77	£513.41	£66.08	£245.92

### Seasonal Distribution of Key Visitor Metrics: 2023



**Total FTEs Supported**  
**3,725**

### Employment Supported by Tourism

The expenditure and activity of visitors to Angus supported a total of 3,725 Full-Time Equivalent jobs (FTEs) in 2023; an increase of 3.1% on the year before, and now just -2.3% below 2019 pre-covid levels.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 2,705 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 1,020 FTEs. The Accommodation sector is the largest employment sector supported by tourism activity, accounting for an estimated 683 FTEs, followed by Food & Drink at 639 FTEs, just ahead of Transport at 601 FTEs.

### Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2023

Employment Supported by Sector 2023	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	683	639	192	590	601	2,705	1,020	3,725

# STEAM Comparative Headlines: 2022 and 2023

STEAM REPORT FOR 2012-2023 - FINAL

Comparing 2023 and 2022

COMPARATIVE HEADLINES

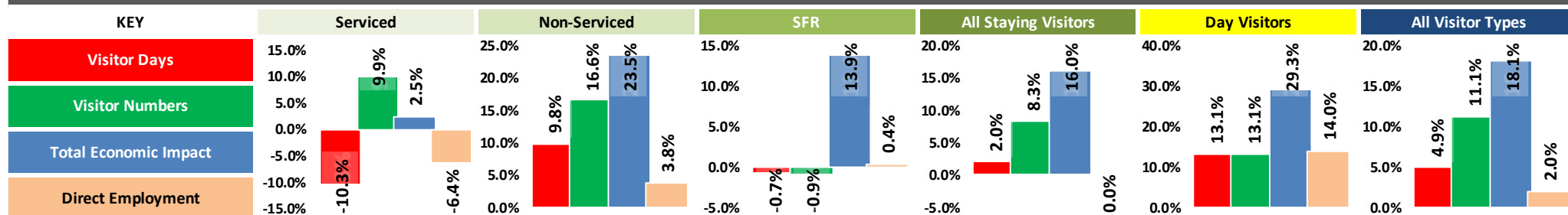
ANGUS COUNCIL

All £'s Historic Prices

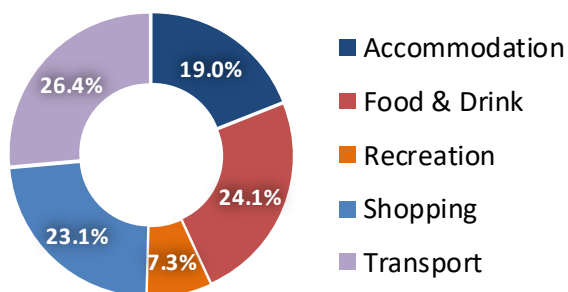
## KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2023 & 2022 - IN HISTORIC PRICES

KEY	Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced																	
	2023	2022	+/- %	2023	2022	+/- %	2023	2022	+/- %	2023	2022	+/- %	2023	2022	+/- %	2023	2022	+/- %			
Visitor Days	M	0.304	0.339	-10.3%	0.840	0.765	9.8%	0.652	0.657	-0.7%	1.795	1.760	2.0%	0.712	0.630	13.1%	2.507	2.390	4.9%		
Visitor Numbers	M	0.160	0.146	9.9%	0.155	0.133	16.6%	0.143	0.145	-0.9%	0.458	0.423	8.3%	0.712	0.630	13.1%	1.170	1.053	11.1%		
Direct Expenditure	£M																217.59	185.69	17.2%		
Economic Impact	£M	52.74	51.48	2.5%	134.62	109.03	23.5%	64.67	56.80	13.9%	252.04	217.31	16.0%	53.77	41.60	29.3%	305.81	258.91	18.1%		
Direct Employment	FTEs	643	686	-6.4%	1,105	1,064	3.8%	521	519	0.4%	2,268	2,269	0.0%	436	383	14.0%	2,705	2,652	2.0%		
Total Employment	FTEs																3,725	3,612	3.1%		

## PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2023 & 2022 - IN HISTORIC PRICES



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



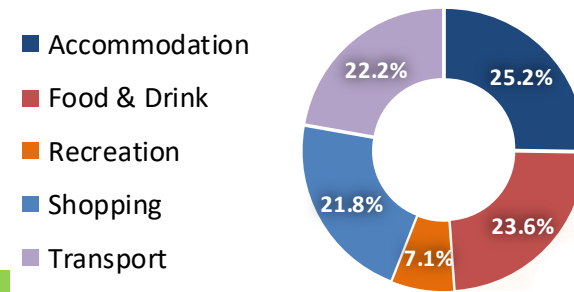
Direct Expenditure Categories

	2023	2022	+/- %
Accommodation	41.34	33.69	22.7%
Food & Drink	52.51	45.20	16.2%
Recreation	15.88	13.60	16.7%
Shopping	50.35	43.38	16.1%
Transport	57.51	49.81	15.4%
<b>TOTAL DIRECT</b>	<b>217.59</b>	<b>185.69</b>	<b>17.2%</b>
Indirect	88.22	73.22	20.5%
<b>TOTAL</b>	<b>305.81</b>	<b>258.91</b>	<b>18.1%</b>

### Sectors

	2023	2022	+/- %
Accommodation	683	675	1.1%
Food & Drink	639	624	2.4%
Recreation	192	186	2.9%
Shopping	590	576	2.4%
Transport	601	590	1.8%
<b>TOTAL DIRECT</b>	<b>2,705</b>	<b>2,652</b>	<b>2.0%</b>
Indirect	1,020	960	6.2%
<b>TOTAL</b>	<b>3,725</b>	<b>3,612</b>	<b>3.1%</b>

### Sectoral Distribution of Employment - FTEs



Direct Employment Categories

# STEAM Comparative Headlines: 2019 and 2023 Covid Recovery (Unindexed)

STEAM REPORT FOR 2012-2023 - FINAL

Comparing 2023 and 2019

COMPARATIVE HEADLINES

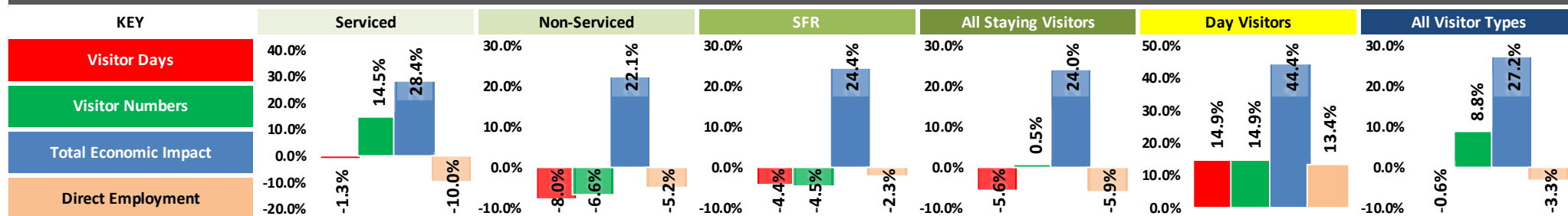
ANGUS COUNCIL

All £'s Historic Prices

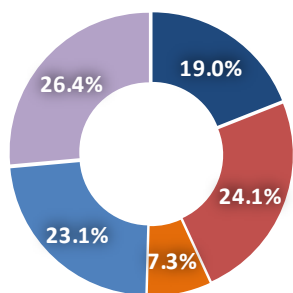
## KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2023 & 2019 - IN HISTORIC PRICES

KEY	Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced																	
	2023	2019	+/- %	2023	2019	+/- %	2023	2019	+/- %	2023	2019	+/- %	2023	2019	+/- %	2023	2019	+/- %			
Visitor Days	M	0.304	0.308	-1.3%	0.840	0.912	-8.0%	0.652	0.681	-4.4%	1.795	1.902	-5.6%	0.712	0.620	14.9%	2.507	2.521	-0.6%		
Visitor Numbers	M	0.160	0.140	14.5%	0.155	0.166	-6.6%	0.143	0.150	-4.5%	0.458	0.456	0.5%	0.712	0.620	14.9%	1.170	1.076	8.8%		
Direct Expenditure	£M																217.59	171.50	26.9%		
Economic Impact	£M	52.74	41.08	28.4%	134.62	110.22	22.1%	64.67	51.97	24.4%	252.04	203.27	24.0%	53.77	37.23	44.4%	305.81	240.50	27.2%		
Direct Employment	FTEs	643	714	-10.0%	1,105	1,165	-5.2%	521	533	-2.3%	2,268	2,411	-5.9%	436	385	13.4%	2,705	2,796	-3.3%		
Total Employment	FTEs																3,725	3,812	-2.3%		

## PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2023 & 2019 - IN HISTORIC PRICES



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



- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport

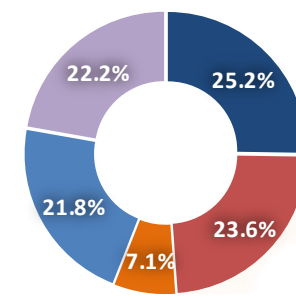
Direct Expenditure Categories

	2023	2019	+/- %
Accommodation	41.34	30.32	36.3%
Food & Drink	52.51	41.57	26.3%
Recreation	15.88	12.67	25.3%
Shopping	50.35	40.92	23.1%
Transport	57.51	46.01	25.0%
<b>TOTAL DIRECT</b>	<b>217.59</b>	<b>171.50</b>	<b>26.9%</b>
Indirect	88.22	69.00	27.9%
<b>TOTAL</b>	<b>305.81</b>	<b>240.50</b>	<b>27.2%</b>

### Sectors

	2023	2019	+/- %
Accommodation	683	735	-7.1%
Food & Drink	639	644	-0.8%
Recreation	192	195	-1.6%
Shopping	590	610	-3.3%
Transport	601	612	-1.8%
<b>TOTAL DIRECT</b>	<b>2,705</b>	<b>2,796</b>	<b>-3.3%</b>
Indirect	1,020	1,016	0.4%
<b>TOTAL</b>	<b>3,725</b>	<b>3,812</b>	<b>-2.3%</b>

### Sectoral Distribution of Employment - FTEs



- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport

Direct Employment Categories