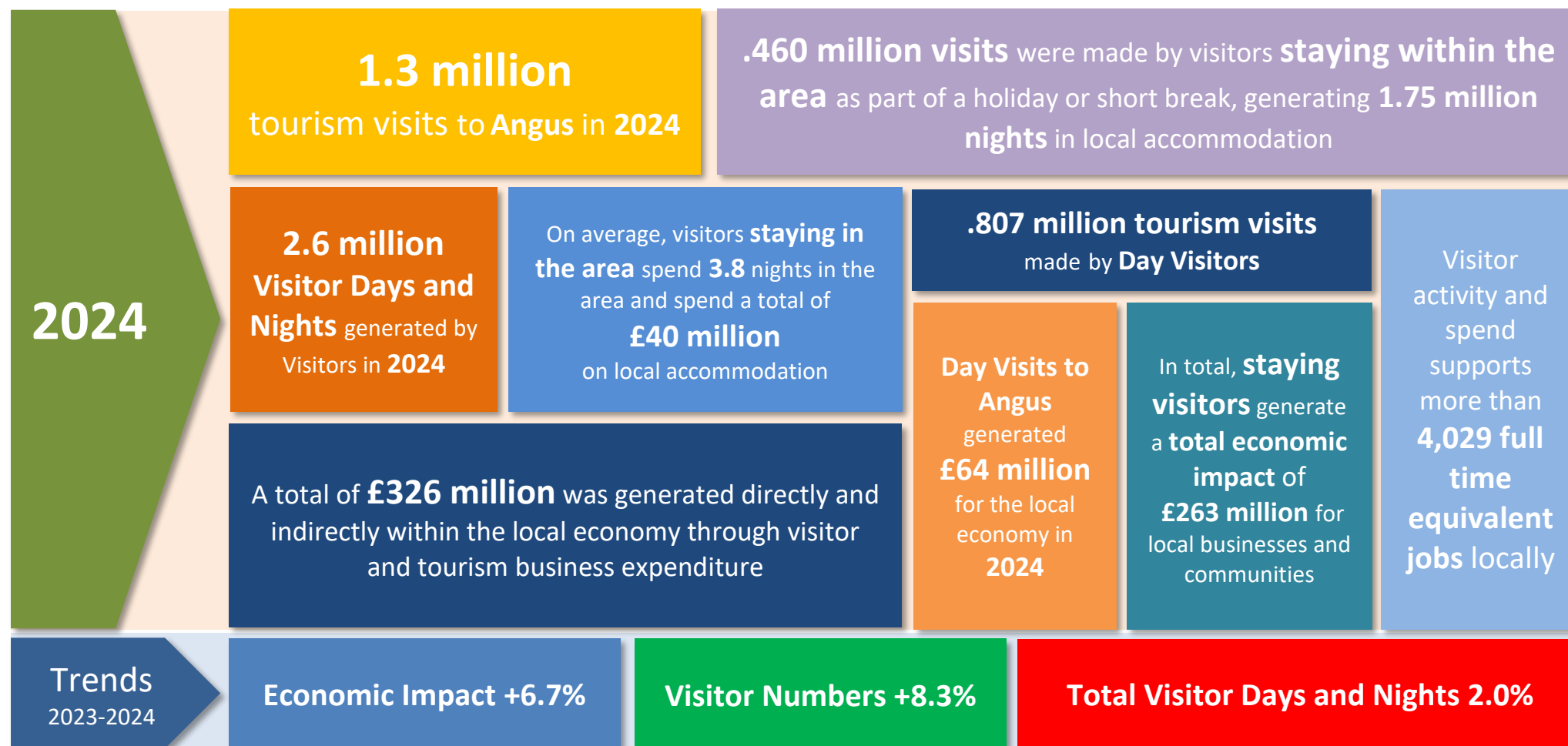


## The Visitor Economy of Angus

This is a summary of the annual tourism economic impact research undertaken for Angus Council for the calendar years 2013-2024. Outputs in this report have been generated using the Scottish Tourism Economic Activity Model (STEAM), owned and operated by Global Tourism Solutions (UK) Ltd.

COVID-19 /  
STL Registration

Estimated tourism figures throughout Scotland appear to have returned to or surpassed pre-Covid estimates for the first time. In some cases, compulsory Short Term Let registration has caused changes in accommodation provision numbers, which can in turn affect STEAM estimates.



# 2024

## 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**

**36%** of Visits

**Day Visitors**

**64%** of Visits

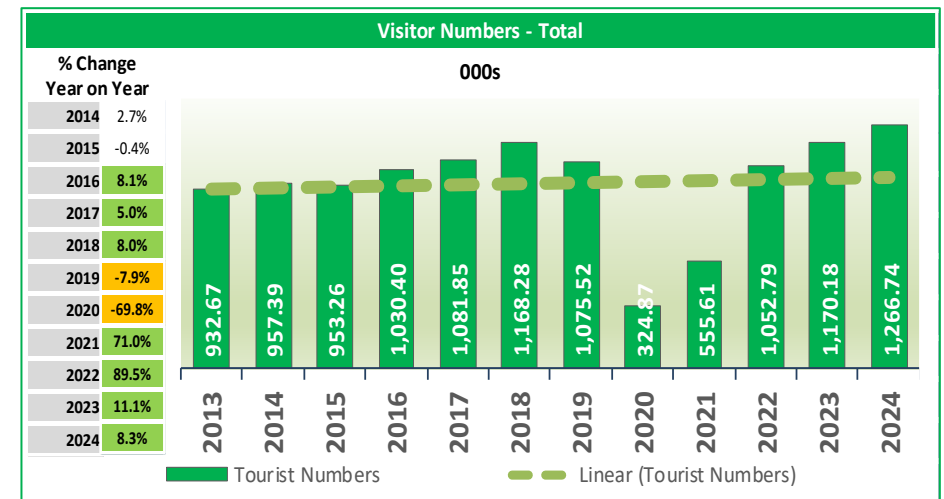
**Total  
Visitor  
Numbers  
1.3m**

## Visitor Numbers

There were an estimated 1.3m tourism visits to Angus in 2024, up by 8.3% from the previous year, and also up 17.8% from estimated pre-covid levels reported in 2019, mainly due to increases in the non-serviced accommodation sector and day visitor numbers.

In 2024, .460m visitors stayed in some sort of accommodation within the area. This sector saw a fractional increase of 0.3% when compared to the previous year and is now 0.9% above pre-covid levels. The serviced accommodation sector, primarily comprised of hotels, guest houses and B&Bs, saw a decrease of -8.5% over the last year, but is 4.8% above 2019 pre-covid

levels. In contrast, the larger non-serviced accommodation sector was up 12.5% on the previous year, partially due to an increase in registered non-serviced accommodation within the area. Day visitors throughout many locations in the UK are just returning to pre-covid levels, especially in rural and semi-rural locations, so it is very encouraging to see that day visitors were up by 13.3% on the previous year, and they are now 30.2% above pre-covid estimates. This has had a positive knock-on effect on total visitor numbers as a whole, as day visitors represent 64% of visitor numbers to Angus.



## Key Figures: Visitor Numbers 2024

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	M	0.147	0.174	0.139	0.460	0.807	1.267
2023 (Millions)	M	0.160	0.155	0.143	0.458	0.712	1.170
Change 23/24 (%)	%	-8.5	+12.5	-2.9	+0.3	+13.3	+8.3
Share of Total (%)	%	11.6	13.8	11.0	36.3	63.7	100.0

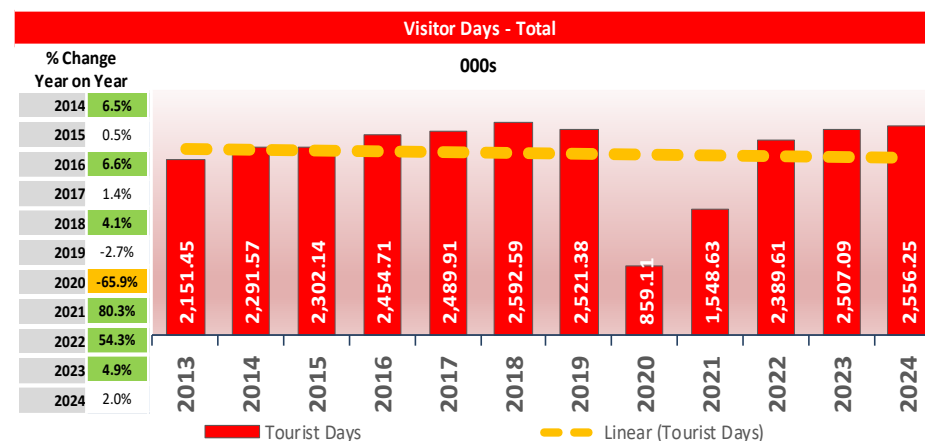
**Total  
Visitor  
Days  
2.6m**

## Visitor Days

Visitors spent an estimated 2.6m days in Angus during 2024. 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 3.8 days.

Total staying visitors accounted for 1.75m visitor days in 2024, a slight decrease of -2.6% on the previous year, and also -8.0% below 2019 pre-covid levels. The serviced accommodation sector decreased significantly by -24.8%

when compared to 2023, and is also below pre-Covid figures reported in 2019. In contrast, the larger non-serviced accommodation sector is up 5.4% on the previous year, and is only -3.0% below pre-covid 2019 levels. This points to the non-serviced sector recovering well ahead of the serviced sector, in part due to reductions in B&Bs and guest houses over the past year, perhaps as a result of compulsory registration. As mentioned before, day visitors to the area are up by 13.3% on the previous year, a good result when compared to other areas, especially rural ones.



### Key Figures: Visitor Days 2024

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	M	0.228	0.885	0.636	1.749	0.807	2.556
2023 (Millions)	M	0.304	0.840	0.652	1.795	0.712	2.507
Change 23/24 (%)	%	-24.8	+5.4	-2.5	-2.6	+13.3	+2.0
Share of Total (%)	%	8.9	34.6	24.9	68.4	31.6	100.0

### Average Length of Stay for Different Visitor Types: 2024



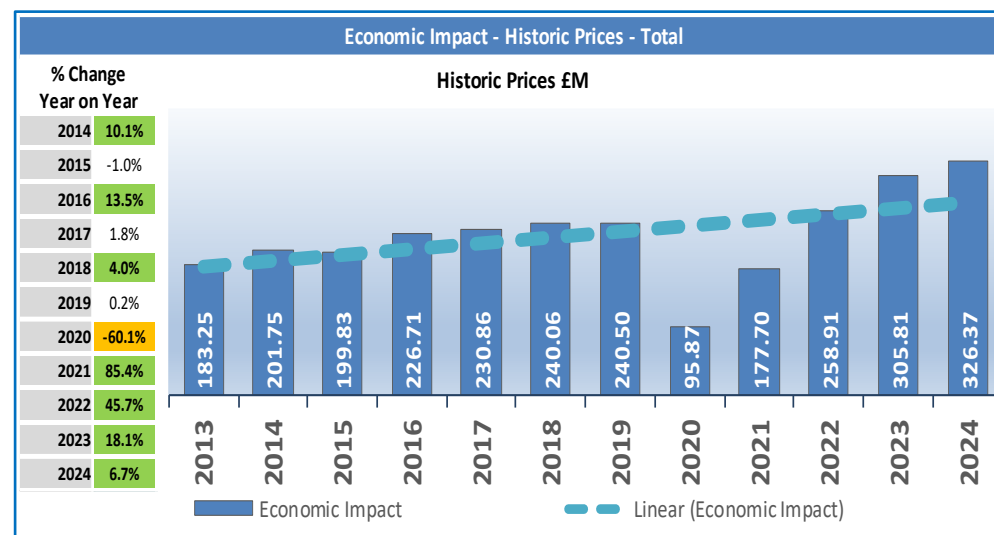
**Total  
Economic  
Impact  
£326m**

## Economic Impact

The value of tourism activity in Angus was estimated to be £326m in 2024, up by 6.7% on the previous year, and up by 1.6% (indexed for inflation) when compared to pre-covid levels.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £231.4m. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £94.9m, together totalling £326m.

The largest visitor spending sector was Transport (£61m), then Food & Drink (£57m), followed closely by Shopping (£55m). The economic impact of the serviced sector was down -9.9% on the previous year due to closures and as a result is still below estimated 2019 pre-covid levels. The larger non-serviced accommodation sector, comprising self-catering and some caravan, camping and touring sites, was up 10.3% on 2023 and is also above pre-covid estimates. In terms of comparison, the non-serviced sector has over five times the bedspaces of the serviced sector and has around three times the economic impact. Meanwhile the day visitor economic impact is up 18.7% on the previous year, and is now 28.4% above pre-covid levels when indexed for inflation.



<b>Accommodation:</b>	Payments for overnight stays in accommodation, such as room rates, pitch fees and hire charges for non-serviced accommodation
<b>Recreation:</b>	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.
<b>Transport:</b>	Expenditure within the destination on travel, including fuel and public transport tickets
<b>Food and Drink:</b>	Spend on eating and drinking at restaurants, cafes and other venues, takeaway food, snacks and groceries
<b>Shopping:</b>	What visitors spend on items including clothing / jewellery, household items, music / films / games, gifts and smaller items, books and maps, plants and garden items
<b>Indirect:</b>	The expenditure by local tourism businesses within the local supply chain

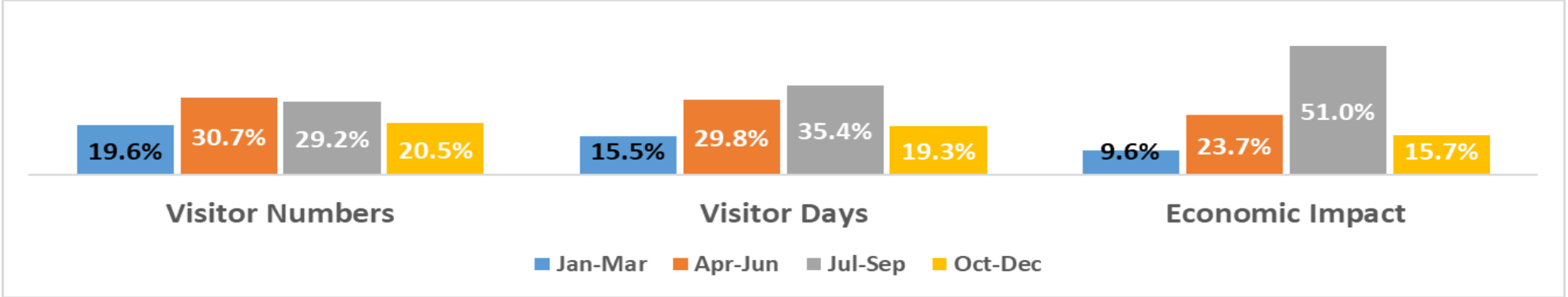
## Key Figures: Economic Impact 2024

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (£ Millions)	£M	47.524	148.526	66.503	262.553	63.821	326.375
2023 (£ Millions)	£M	52.744	134.624	64.672	252.040	53.770	305.810
Change 23/24 (%)	%	-9.9	+10.3	+2.8	+4.2	+18.7	+6.7
Share of Total (%)	%	14.6	45.5	20.4	80.4	19.6	100.0

Average Economic Impact Generated by Each Type of Visitor: 2024

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	£ 208.01	£ 167.77	£ 104.63	£ 150.08	£ 79.10	£ 127.68
Economic Impact per Visit	£ 324.10	£ 852.73	£ 478.24	£ 570.93	£ 79.10	£ 257.65

Seasonal Distribution of Key Visitor Metrics: 2024



Total FTEs Supported  
**3,342**

Employment Supported by Tourism

The expenditure and activity of visitors to Angus supported a total of 4,029 Full-Time Equivalent jobs (FTEs) in 2024; an increase of 8.2% on the year before, and 5.7% above 2019 pre-covid levels.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 2,983 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 1,046 FTEs. The Accommodation sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 892 FTEs, followed by Food & Drink at 665 FTEs, then Shopping at 620 FTEs closely followed by Transport at 611 FTEs.

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2024

Employment Supported by Sector 2024	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	892	665	195	620	611	2,983	1,046	4,029

# STEAM Comparative Headlines: 2023 and 2024 (Unindexed)

STEAM REPORT FOR 2013-2024 - FINAL

ANGUS COUNCIL

Comparing 2024 and 2023

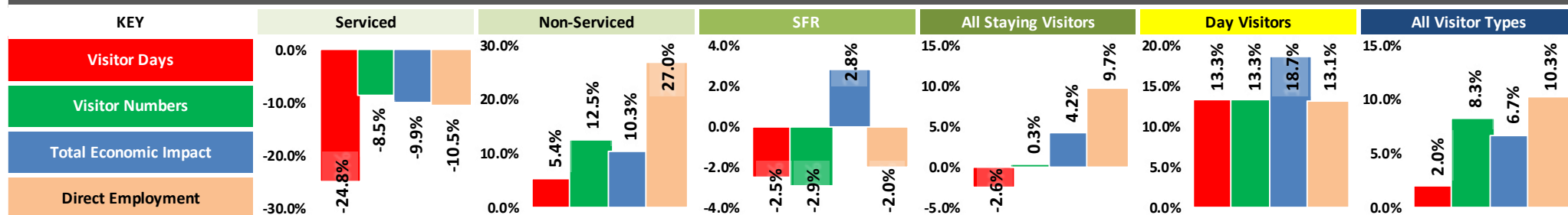
All £'s Historic Prices

COMPARATIVE HEADLINES

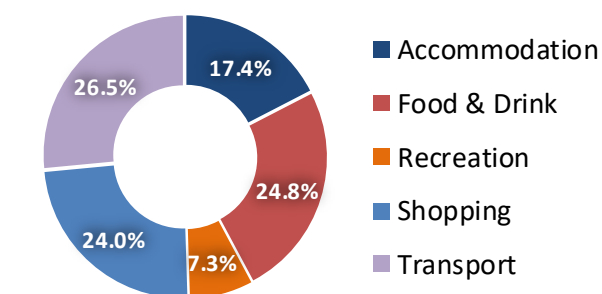
## KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2023 - IN HISTORIC PRICES

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		2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %
Visitor Days	M	0.228	0.304	-24.8%	0.885	0.840	5.4%	0.636	0.652	-2.5%	1.749	1.795	-2.6%	0.807	0.712	13.3%	2.556	2.507	2.0%
Visitor Numbers	M	0.147	0.160	-8.5%	0.174	0.155	12.5%	0.139	0.143	-2.9%	0.460	0.458	0.3%	0.807	0.712	13.3%	1.267	1.170	8.3%
Direct Expenditure	£M																231.43	217.59	6.4%
Economic Impact	£M	47.52	52.74	-9.9%	148.53	134.62	10.3%	66.50	64.67	2.8%	262.55	252.04	4.2%	63.82	53.77	18.7%	326.37	305.81	6.7%
Direct Employment	FTEs	575	643	-10.5%	1,403	1,105	27.0%	510	521	-2.0%	2,489	2,268	9.7%	494	436	13.1%	2,983	2,705	10.3%
Total Employment	FTEs																4,029	3,725	8.2%

## PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2023 - IN HISTORIC PRICES



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



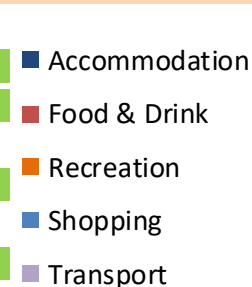
Direct Expenditure Categories

	2024	2023	+/- %
Accommodation	40.29	41.34	-2.5%
Food & Drink	57.34	52.51	9.2%
Recreation	16.93	15.88	6.6%
Shopping	55.51	50.35	10.2%
Transport	61.34	57.51	6.7%
<b>TOTAL DIRECT</b>	<b>231.43</b>	<b>217.59</b>	<b>6.4%</b>
Indirect	94.95	88.22	7.6%
<b>TOTAL</b>	<b>326.37</b>	<b>305.81</b>	<b>6.7%</b>

### Sectors

	2024	2023	+/- %
Accommodation	892	683	30.6%
Food & Drink	665	639	4.1%
Recreation	195	192	1.6%
Shopping	620	590	5.1%
Transport	611	601	1.7%
<b>TOTAL DIRECT</b>	<b>2,983</b>	<b>2,705</b>	<b>10.3%</b>
Indirect	1,046	1,020	2.6%
<b>TOTAL</b>	<b>4,029</b>	<b>3,725</b>	<b>8.2%</b>

### Sectoral Distribution of Employment - FTEs



Direct Employment Categories

# STEAM Comparative Headlines: 2019 and 2024 Covid Recovery (Indexed for inflation)

STEAM REPORT FOR 2013-2024 - FINAL

ANGUS COUNCIL

Comparing 2024 and 2019

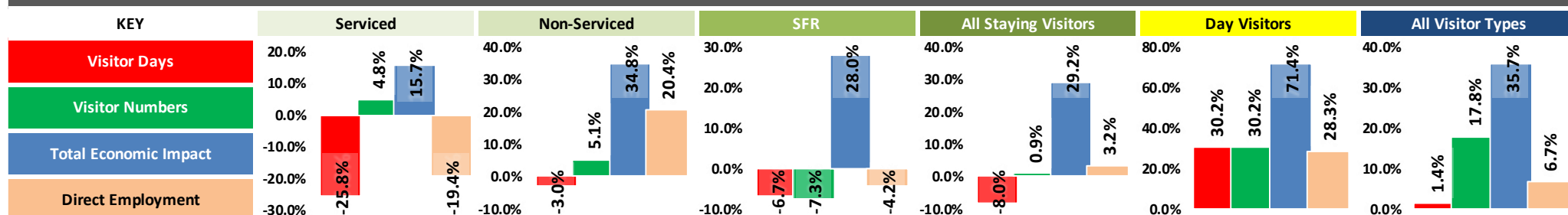
All £'s Historic Prices

COMPARATIVE HEADLINES

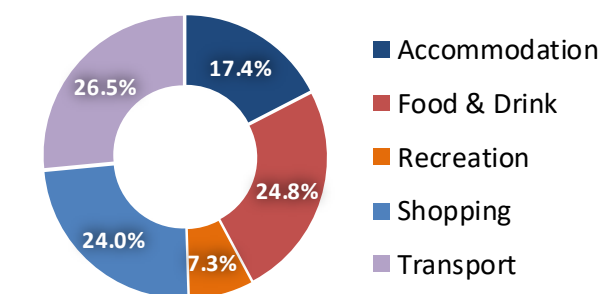
## KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2019 - IN HISTORIC PRICES

KEY		Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced						Non-Serviced			2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %
		2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %												
An increase of 3% or more																						
Less than 3% change																						
A Fall of 3% or more																						
Visitor Days	M	0.228	0.308	-25.8%	0.885	0.912	-3.0%	0.636	0.681	-6.7%	1.749	1.902	-8.0%	0.807	0.620	30.2%	2.556	2.521	1.4%			
Visitor Numbers	M	0.147	0.140	4.8%	0.174	0.166	5.1%	0.139	0.150	-7.3%	0.460	0.456	0.9%	0.807	0.620	30.2%	1.267	1.076	17.8%			
Direct Expenditure	£M																			231.43	171.50	34.9%
Economic Impact	£M	47.52	41.08	15.7%	148.53	110.22	34.8%	66.50	51.97	28.0%	262.55	203.27	29.2%	63.82	37.23	71.4%	326.37	240.50	35.7%			
Direct Employment	FTEs	575	714	-19.4%	1,403	1,165	20.4%	510	533	-4.2%	2,489	2,411	3.2%	494	385	28.3%	2,983	2,796	6.7%			
Total Employment	FTEs																			4,029	3,812	5.7%

## PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2019 - IN HISTORIC PRICES



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



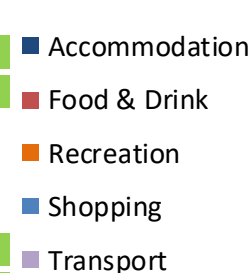
Direct Expenditure Categories

	2024	2019	+/- %
Accommodation	40.29	30.32	32.9%
Food & Drink	57.34	41.57	37.9%
Recreation	16.93	12.67	33.6%
Shopping	55.51	40.92	35.7%
Transport	61.34	46.01	33.3%
<b>TOTAL DIRECT</b>	<b>231.43</b>	<b>171.50</b>	<b>34.9%</b>
Indirect	94.95	69.00	37.6%
<b>TOTAL</b>	<b>326.37</b>	<b>240.50</b>	<b>35.7%</b>

### Sectors

	2024	2019	+/- %
Accommodation	892	735	21.4%
Food & Drink	665	644	3.3%
Recreation	195	195	0.1%
Shopping	620	610	1.6%
Transport	611	612	-0.2%
<b>TOTAL DIRECT</b>	<b>2,983</b>	<b>2,796</b>	<b>6.7%</b>
Indirect	1,046	1,016	3.0%
<b>TOTAL</b>	<b>4,029</b>	<b>3,812</b>	<b>5.7%</b>

### Sectoral Distribution of Employment - FTEs



Direct Employment Categories