Angus Council

STEAM Tourism Economic Impacts 2025 Year in Review Summary

Angus Council
Comhairle Aonghais

The Visitor Economy of Angus

This is a summary of the annual tourism economic impact research undertaken for Angus Council for the calendar years 2014-2025. 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 have returned to or surpassed pre-Covid estimates. In some cases, compulsory Short Term Let registration has caused changes in accommodation provision numbers, which can in turn affect STEAM estimates.**

2025

1.3 million tourism visits to **Angus** in **2025**

.479 million visits were made by visitors **staying within the area** as part of a holiday or short break, generating **1.85 million nights** in local accommodation

2.7 million Visitor Days and Nights generated by Visitors in **2025**

On average, visitors **staying in the area** spend **3.85** nights in the area and spend a total of **£45.8 million** on local accommodation

.814 million tourism visits made by **Day Visitors**

Visitor activity and spend supports more than **4,119 full time equivalent jobs** locally

A total of **£350 million** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

Day Visits to Angus generated **£67 million** for the local economy in **2025**

In total, **staying visitors** generate a **total economic impact** of **£283 million** for local businesses and communities

Trends 2024-2025

Economic Impact +7.3%	Visitor Numbers +2.1%	Total Visitor Days and Nights 4.1%

2025

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

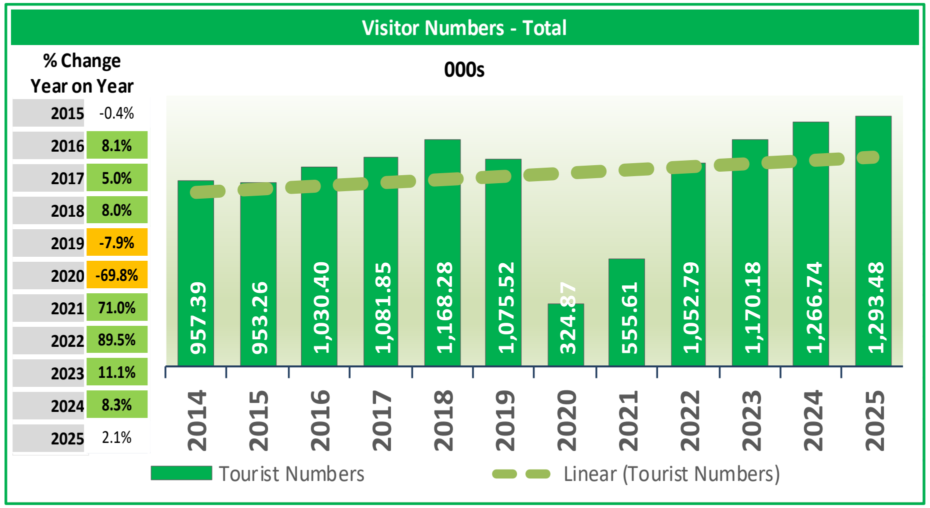
Staying Visitors
37% of Visits

Day Visitors
63% of Visits

Total Visitor Numbers
1.3m

Visitor Numbers

There were an estimated 1.3m tourism visits to Angus in 2025, up by 2.1% from the previous year, and also up 35.1% from estimated levels reported in 2014, due to increases throughout all visitor sectors.



Between 2024 and 2025 visitor numbers rose in Angus, but not uniformly. Visitor numbers were up in non-serviced accommodation (comprising self-catering options and some caravan, camping and touring sites) by 11.1%. But within the Day Visitor sector visitor numbers only rose by 0.9% and within the serviced accommodation sector (primarily comprised of hotels, guest houses and B&Bs) numbers declined fractionally by -0.6% on the year before. This is a consistent pattern seen throughout the United Kingdom, with negative percents in serviced accommodation being commonplace, and one we attribute to the current economic climate. The non-serviced sector is the largest accommodation sector, with 25% more visitor numbers than the serviced sector. Day visitor numbers are on the increase year-on-year, and this is important as they represent 63% of all visitors to Angus and the sector records far more visitor numbers than all accommodation sectors combined.

Key Figures: Visitor Numbers 2025

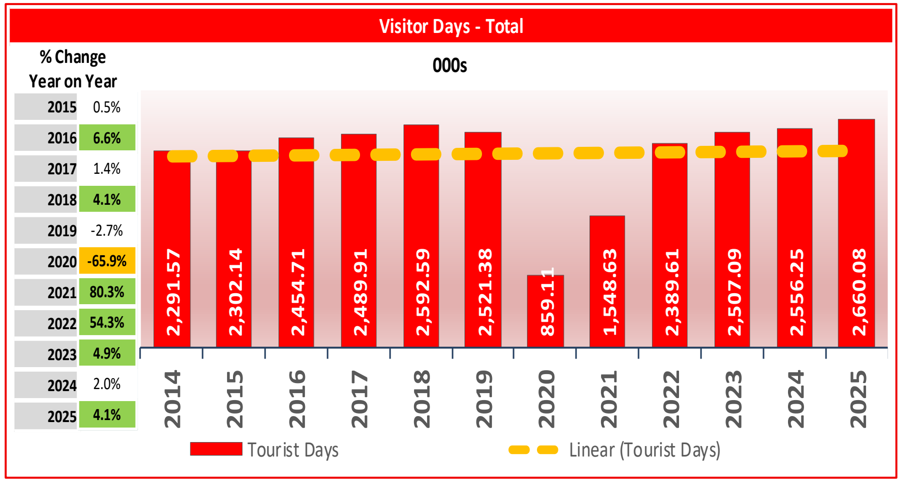
Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (Millions)	**M**	**0.146**	**0.194**	**0.140**	**0.479**	**0.814**	**1.293**
2024 (Millions)	M	0.147	0.174	0.139	0.460	0.807	1.267
Change 24/25 (%)	**%**	**-0.6**	**+11.1**	**+0.8**	**+4.3**	**+0.9**	**+2.1**
Share of Total (%)	%	11.3	15.0	10.8	37.1	62.9	100.0

Total Visitor Days

2.7m

Visitor Days

Visitors spent an estimated 2.7m days in Angus during 2025. 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 3.85 days.



Total visitor days were up 4.1% from the year before. But as we saw with visitor numbers, there are differences within the overall picture. The non-serviced accommodation sector saw a healthy increase 10.6%; combined with a rise in visitor numbers, this means more visits were made to non-serviced accommodation and visitors stayed slightly longer. As mentioned before, we have seen a small downturn in serviced accommodation numbers throughout the UK, and estimates show a fractional decrease in the area of -0.8%. This means days spent in serviced accommodation remained stable with no significant movement. Given the current economic uncertainties and constraints, this might be expected; downturns seem to be more apparent in urban locations. Day visitor numbers and days remain at an increase of 0.9% as day visitors do not stay overnight.

Key Figures: Visitor Days 2025

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (Millions)	**M**	**0.227**	**0.979**	**0.641**	**1.846**	**0.814**	**2.660**
2024 (Millions)	M	0.228	0.885	0.636	1.749	0.807	2.556
Change 24/25 (%)	**%**	**-0.8**	**+10.6**	**+0.8**	**+5.5**	**+0.9**	**+4.1**
Share of Total (%)	%	8.5	36.8	24.1	69.4	30.6	100.0

Average Length of Stay for Different Visitor Types: 2025

Day Visitors	All Visitors	Serviced Accommodation	Staying with Friends/Relatives	All Staying Visitors	Non-Serviced Accommodation
1.0	2.1	1.6	4.5	3.85	5.1

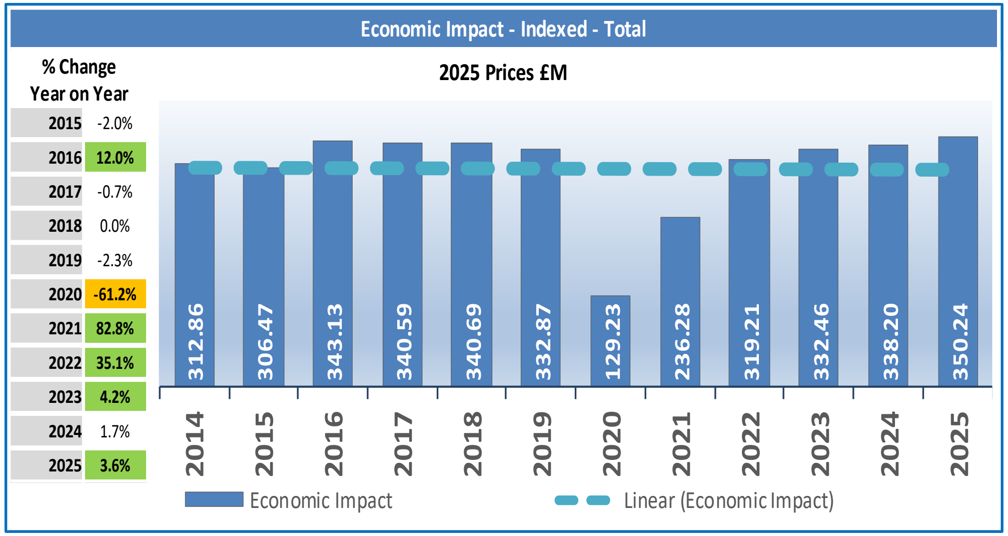
Total Economic Impact

£350m

Economic Impact

The value of tourism activity in Angus was estimated to be £350m in 2025, up by 7.3% on the previous year, and up by 12.0% when indexed for inflation, as illustrated in the bar chart below.

Economic impact is comprised of two sections within the model. The first is the direct expenditure on good and services, in this case, £447 million. To this we conservatively add the indirect economic impact within the area of £103 million, to account for the supply chain- those suppling goods and services to support the visitor sector and its wider infrastructure. By far the most important sector is the non-serviced accommodation sector, at £165 million, up 10.9% on the previous year. This is followed by the day visitor sector at £67 million and then the serviced accommodation sector at £49 million. The model also estimates the sectoral distribution of the economic impact as follows: Transport £64.5m; Food & Drink £60m; followed very closely by Shopping at £59m; then Accommodation £46m; and Recreation at £18m. The non-serviced sector not only has over three times the economic impact of the serviced sector, which is unusual (serviced is usually much larger), but also close to two and a half times the economic impact of the day visitor sector within Angus.



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

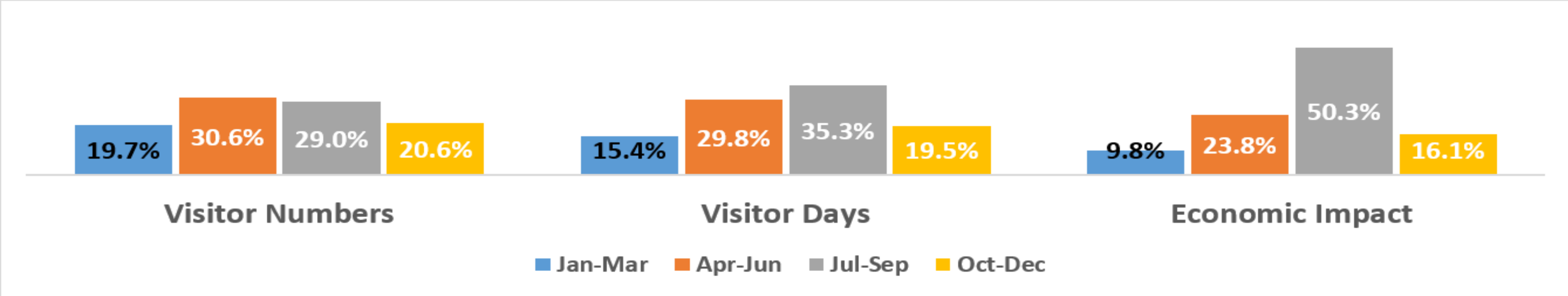
Key Figures: Economic Impact 2025 (Unindexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (£ Millions)	**£M**	**49.239**	**164.769**	**69.500**	**283.508**	**66.737**	**350.244**
2024 (£ Millions)	£M	47.524	148.526	66.503	262.553	63.821	326.375
Change 24/25 (%)	**%**	**+3.6**	**+10.9**	**+4.5**	**+8.0**	**+4.6**	**+7.3**
Share of Total (%)	%	14.1	47.0	19.8	80.9	19.1	100.0

Average Economic Impact Generated by Each Type of Visitor: 2025

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	**£ 217.22**	**£ 168.34**	**£ 108.49**	**£ 153.57**	**£ 81.98**	**£ 131.67**
Economic Impact per Visit	£ 337.82	£ 851.44	£ 495.78	£ 591.31	£ 81.98	£ 270.78

Seasonal Distribution of Key Visitor Metrics: 2025



Total FTEs Supported

4,119

Employment Supported by Tourism

The expenditure and activity of visitors to Angus supported a total of 4,119 Full-Time Equivalent jobs (FTEs) in 2025; an increase of 2.2% on the year before, and 12.6% above 2014 levels.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 3,024 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 1,094 FTEs. The Accommodation sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 896 FTEs, followed by Food & Drink at 677 FTEs, then Shopping at 633 FTEs closely followed by Transport at 620 FTEs.

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2025

Employment Supported by Sector 2025	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	896	677	199	633	620	3,024	1,094	4,119

STEAM Comparative Headlines: 2024 and 2025 (Unindexed)

STEAM REPORT FOR 2014-2025 - FINAL ANGUS	Comparing 2025 and 2024 All £'s Historic Prices	COMPARATIVE HEADLINES

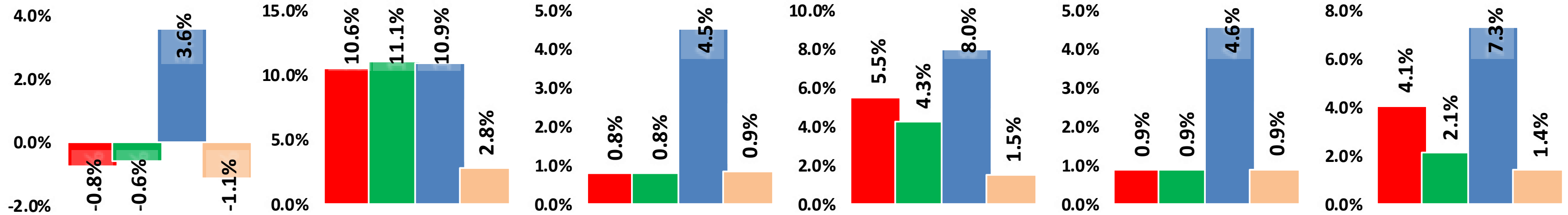
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2025 & 2024 - IN HISTORIC PRICES

KEY
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

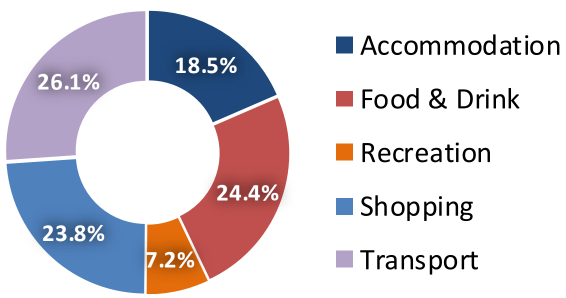
		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %
Visitor Days	M	0.227	0.228	-0.8%	0.979	0.885	10.6%	0.641	0.636	0.8%	1.846	1.749	5.5%	0.814	0.807	0.9%	2.660	2.556	4.1%
Visitor Numbers	M	0.146	0.147	-0.6%	0.194	0.174	11.1%	0.140	0.139	0.8%	0.479	0.460	4.3%	0.814	0.807	0.9%	1.293	1.267	2.1%
Direct Expenditure	£M																247.36	231.43	6.9%
Economic Impact	£M	49.24	47.52	3.6%	164.77	148.53	10.9%	69.50	66.50	4.5%	283.51	262.55	8.0%	66.74	63.82	4.6%	350.24	326.37	7.3%
Direct Employment	FTEs	569	575	-1.1%	1,443	1,403	2.8%	515	510	0.9%	2,526	2,489	1.5%	498	494	0.9%	3,024	2,983	1.4%
Total Employment	FTEs																4,119	4,029	2.2%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2025 & 2024 - IN HISTORIC PRICES

KEY
- Visitor Days
- Visitor Numbers
- Total Economic Impact
- Direct Employment



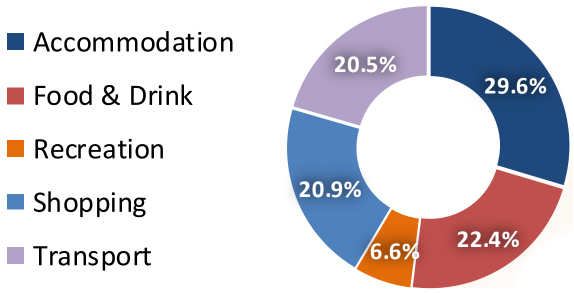
Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices



Direct Expenditure Categories

Sectoral Distribution of Employment - FTEs

Sectors	Economic Impact 2025	Economic Impact 2024	+/- %	Employment 2025	Employment 2024	+/- %
Accommodation	45.76	40.29	13.6%	896	892	0.5%
Food & Drink	60.44	57.34	5.4%	677	665	1.7%
Recreation	17.86	16.93	5.5%	199	195	1.8%
Shopping	58.76	55.51	5.8%	633	620	2.1%
Transport	64.54	61.34	5.2%	620	611	1.5%
TOTAL DIRECT	247.36	231.43	6.9%	3,024	2,983	1.4%
Indirect	102.88	94.95	8.4%	1,094	1,046	4.6%
TOTAL	350.24	326.37	7.3%	4,119	4,029	2.2%



Direct Employment Categories

STEAM Comparative Headlines: 2014 and 2025 (Indexed for inflation)

STEAM REPORT FOR 2014-2025 - FINAL ANGUS	Comparing 2025 and 2014 2014 in 2025 prices (1.551)	COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2025 & 2014 - INDEXED TO 2025

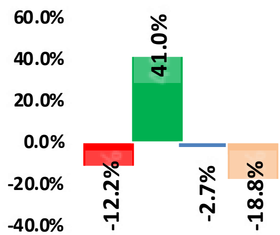
KEY
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2025	2014	+/- %	2025	2014	+/- %	2025	2014	+/- %	2025	2014	+/- %	2025	2014	+/- %	2025	2014	+/- %
Visitor Days	M	0.227	0.258	-12.2%	0.979	0.786	24.6%	0.641	0.660	-2.9%	1.846	1.704	8.4%	0.814	0.588	38.5%	2.660	2.292	16.1%
Visitor Numbers	M	0.146	0.103	41.0%	0.194	0.122	58.2%	0.140	0.144	-2.5%	0.479	0.370	29.8%	0.814	0.588	38.5%	1.293	0.957	35.1%
Direct Expenditure	£M																247.36	223.81	10.5%
Economic Impact	£M	49.24	50.61	-2.7%	164.77	140.88	17.0%	69.50	72.55	-4.2%	283.51	264.04	7.4%	66.74	48.81	36.7%	350.24	312.86	12.0%
Direct Employment	FTEs	569	700	-18.8%	1,443	1,101	31.0%	515	539	-4.5%	2,526	2,340	7.9%	498	366	36.2%	3,024	2,706	11.8%
Total Employment	FTEs																4,119	3,656	12.6%

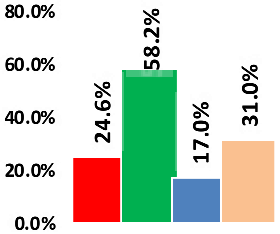
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2025 & 2014 - INDEXED TO 2025

KEY
- Visitor Days
- Visitor Numbers
- Total Economic Impact
- Direct Employment

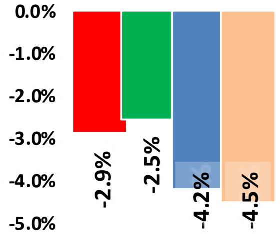
Serviced



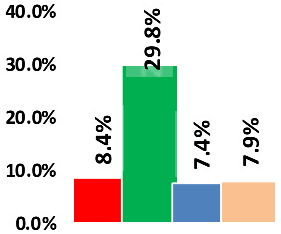
Non-Serviced



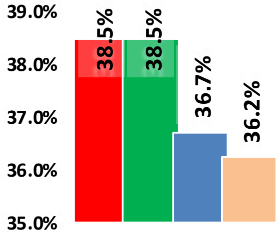
SFR



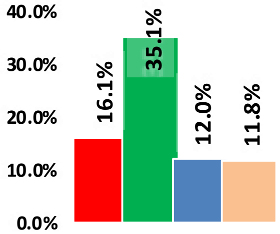
All Staying Visitors



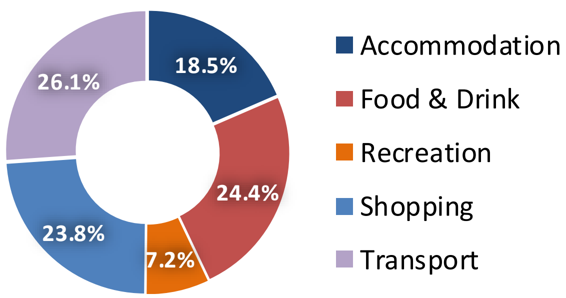
Day Visitors



All Visitor Types

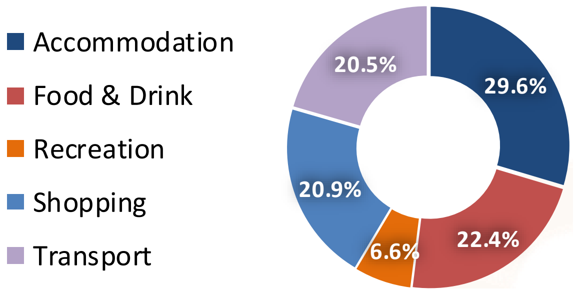


Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2025 / Sectoral Distribution of Employment - FTEs



Direct Expenditure Categories

Economic Impact 2025	Economic Impact 2014	+/- %	Sectors	Employment 2025	Employment 2014	+/- %
45.76	33.98	34.6%	Accommodation	896	697	28.5%
60.44	56.03	7.9%	Food & Drink	677	629	7.5%
17.86	16.42	8.8%	Recreation	199	183	8.4%
58.76	55.36	6.1%	Shopping	633	599	5.8%
64.54	62.02	4.1%	Transport	620	598	3.7%
247.36	223.81	10.5%	TOTAL DIRECT	3,024	2,706	11.8%
102.88	89.05	15.5%	Indirect	1,094	950	15.2%
350.24	312.86	12.0%	TOTAL	4,119	3,656	12.6%



Direct Employment Categories