

# Angus Tourism Framework

**2019 - 2024**



## **Our Vision:**

'To work together with pride and passion to create, deliver and share inspirational experiences for all visitors to Angus'.



## Angus Tourism Framework 2019 - 2024

The Angus Tourism Cooperative (ATC) was established in 2017 and is comprised of Angus businesses whose aim is to work together to improve the tourism offer in Angus.



The current Angus Tourism Framework which runs until 2020, identified the development of an Angus Tourism Leadership Group as a priority.

As the industry body for tourism in Angus, the ATC were keen to identify specific activity they could drive forward. As such, it was decided to review the framework in partnership with industry.

In November 2018, over 30 stakeholders, including the ATC, local businesses, VisitScotland, Angus Council and the Scottish Tourism Alliance, met to discuss a revised tourism framework for Angus.

A steering group made up of representatives from a variety of sectors was formed to develop the new framework.

### Tay Cities Region Tourism Strategy 2019-2024

The first Tay Cities Regional Tourism Strategy has been developed.

By working together and focusing on the region's strengths, the aim is to grow the value of tourism across the region.

The Tay Cities Region Tourism Strategy will recommend activity to be delivered regionally, where there is rationale for doing so, with certain activity continuing to be delivered locally.

Three common strengths or 'connectors' have been identified for the region;



Culture &  
Creative  
Industries



Food  
& Drink



Outdoor  
Activities

Other connectors for the region include golf, business events and cruise tourism.

Regional activity will focus on;

- Building our capabilities
- Improving the customer journey
- Supporting leadership and collaboration

Work is ongoing to determine the governance and delivery of the regional tourism strategy; however, the ambition is that a regional tourism partnership will be established.

Work is also underway to develop a new **National Tourism Strategy**, with the launch planned for October 2019.



#### Tay Cities Region

- Angus
- Dundee
- North East Fife
- Perth & Kinross

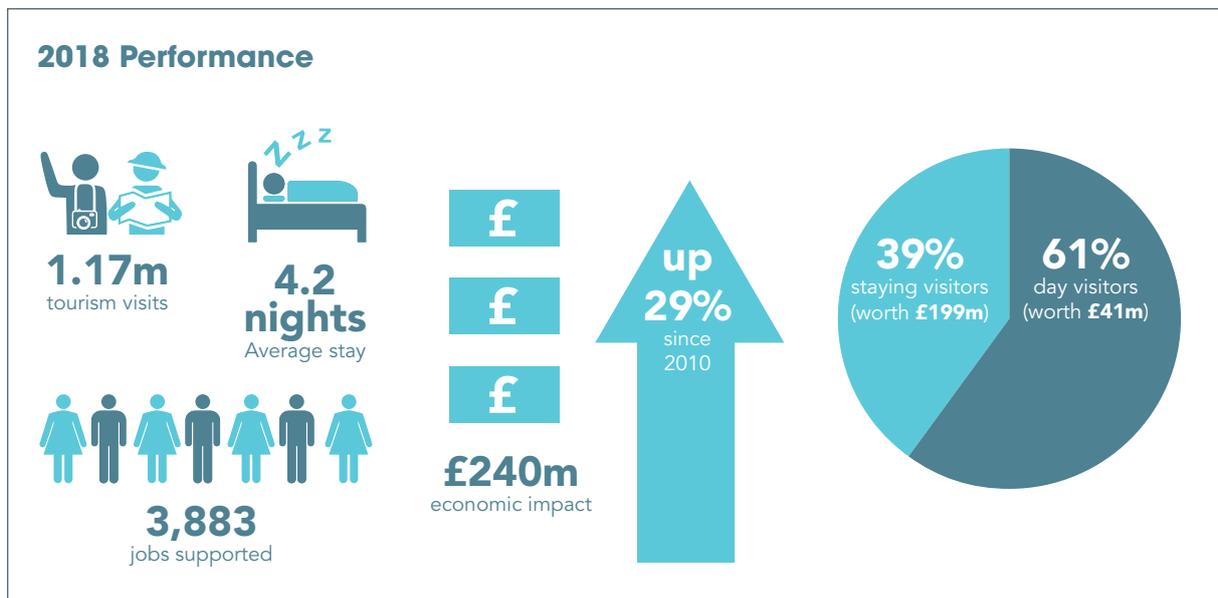
## Tourism in Angus

Angus has seen an increase in the volume and value of tourism since 2010.

The ambition outlined in the Angus Tourism Framework 2015–2020, was to increase the economic impact of tourism to Angus to £220 million (+9%) by 2020, against a baseline of £202 million in 2014. The value of tourism in Angus has since surpassed this target.

	2014	2015	2016	2017
<b>Economic Impact</b>	£202m	£200m	£227m	£231m
<b>No. of Tourism Visits</b>	957,390	953,260	1,030,400	1,081,850
<b>Full-Time Equivalent Jobs (FTE)</b>	3,656	3,632	3,935	3,887

Source: Scottish Tourism Economic Activity Monitor (STEAM)



The framework steering group identified the following key strengths and opportunities for Angus;

### Strengths

- Location – Angus is easy to get to, yet offers an authentic, diverse, rural landscape.
- Lots to see and do
- Abundance of history and heritage
- Unique cultural offer
- Strong golf product

### Opportunities

- Maximise the food and drink offer in Angus
- Target new audiences, such as visitors to V&A Dundee and the cruise market
- Network and collaborate more effectively, to share information and best practice
- Work together to offer a programme of joined up events and experiences, such as culture, heritage, and food & drink

## Trends

The following tourism trends were considered to be relevant for reference and inclusion within the revised tourism framework for Angus:

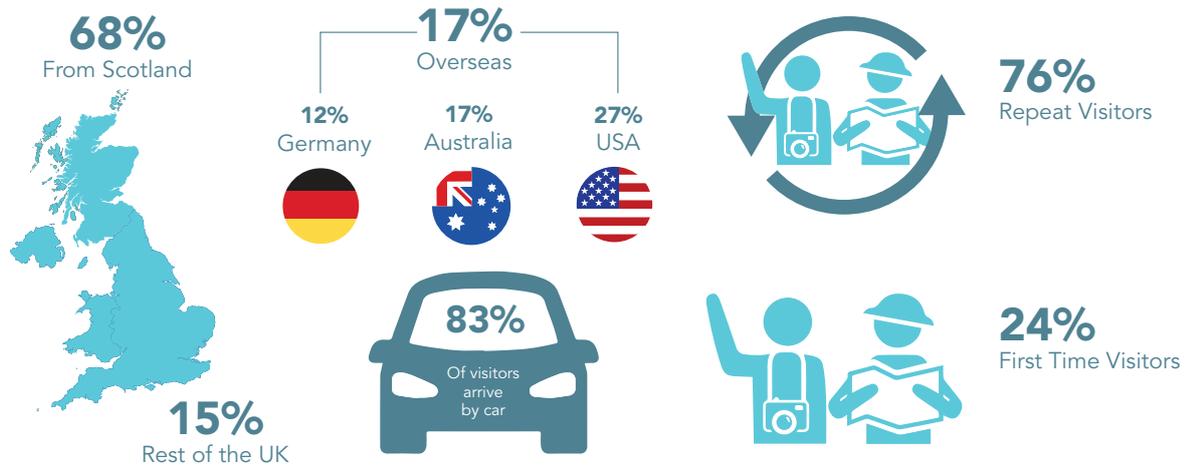
- The evolving influence of the **Angus Tourism Cooperative** and increased collaborative activity within the tourism sector in Angus.
- The opening of **V&A Dundee** and the potential impact for Angus.
- Increased competition from the **'Sharing Economy'** e.g. AirBnB.
- The importance of **digital connectivity** and the impact **technological advances** are having on consumer behaviour, such as the increased use of smartphones to curate personal experiences, and the influence of Online Travel Agents (OTAs).
- Greater access to **data/market intelligence**.
- The increase in **multi-generational travel** and the growing importance of the **accessibility** market.
- Increased awareness of **'green'/environmental responsibility**.
- The increase in **staycations** and **short breaks**.
- More visitors are **travelling with a purpose** e.g. 'Gap' Year, Business, Sporting, and Experiential.
- Growth markets to Scotland, e.g. **China**.
- **Higher visitor expectations** and greater demand for **experiences**.
- **Local food and drink** as an important part of the experience.
- Increased interest in local **culture, history and heritage**.
- **Film Tourism** (location) in Scotland.
- Increase in demand for **Wild Camping and Glamping**.

Understanding these trends can help businesses identify opportunities to develop products and experiences which meet the needs of current and future visitors to Angus.



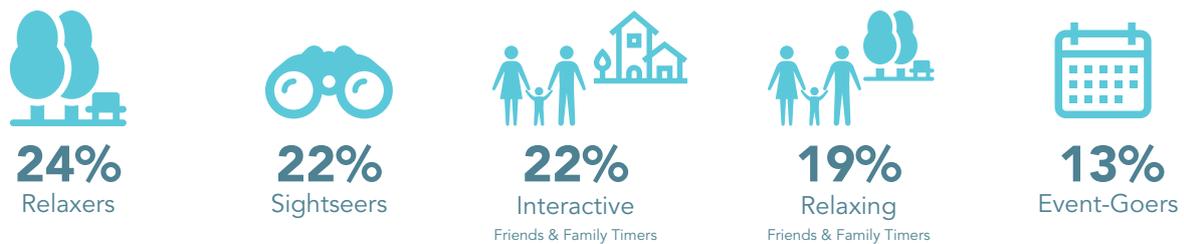
## Target Markets

The Angus Visitor Survey was undertaken between July 2016 and June 2017.



The survey results provide an insight into visitor behaviour and perceptions of the area as well as an understanding of purchasing behaviour.

Five segments were identified based on visiting motivations and attitudes towards Angus as well as their needs, activities and behaviours.



The VisitScotland segmentation model identifies five primary UK target segments;

- Engaged Sightseers
- Adventure Seekers
- Curious Travellers
- Natural Advocates
- Food-Loving Culturalists

The following geographic target markets have been identified based on the results of the Angus Visitor Survey; VisitScotland insights and industry insights.

Geographic Markets	Channels	Segments
<b>Primary</b>		
Scotland UK Germany Netherlands USA Canada Australia	Consumer (direct) Travel Trade (group and FIT) Cruise Market Media and Travel Influencers Dundee & Angus Convention Bureau (DACB)	Relaxers Sightseers (Engaged Sightseers) Interactive Friends and Family Timers Relaxing Friends and Family Timers (Natural Advocates) Event-Goers Local Audience Visiting Friends & Relatives (VFR)
<b>Secondary</b>		
France Spain Italy Scandinavia Emerging Markets e.g. China/Asia	Travel Trade (group and FIT) Media and Travel Influencers Dundee & Angus Convention Bureau (DACB)	Adventure Seekers Food Loving Culturalists Curious Travellers Business Events

## Our Vision:

'To work together with pride and passion to create, deliver and share inspirational experiences for all visitors to Angus'.

## Objectives:

- To grow the economic impact of tourism to Angus from £231 million in 2017 to £266 million by 2024 (+15%).
- To increase the overall number of staying visitors to Angus from 40% in 2017 to 45% by 2024.

## Aims:

- To have an industry-led, collaborative approach to identifying opportunities for growth and for delivering support.
- To harness the positivity and ambition of local communities to share their pride of Angus with visitors.
- To gather data to enable all businesses to better understand current and future markets in order to meet and exceed their expectations.
- To deliver innovative and inspirational products and experiences for all visitors to Angus.
- To raise the profile of Angus locally, nationally and internationally in order to attract more visitors to the area.

## Strategic Themes

<b>Industry Leadership &amp; Collaboration</b>	<ul style="list-style-type: none"><li>- Strengthen the role of the ATC.</li><li>- Improve the capabilities of tourism businesses.</li><li>- Develop and support industry leaders.</li><li>- Support initiatives to promote tourism as a career choice.</li></ul>
<b>Pride of Place</b>	<ul style="list-style-type: none"><li>- Engage local communities in the design and delivery of the visitor experience.</li><li>- Encourage local people to be advocates for Angus.</li><li>- Create opportunities to share stories and experiences with locals and visitors.</li><li>- Encourage cultural and heritage venues to play a central role in Place Making across Angus.</li></ul>
<b>Data &amp; Insights</b>	<ul style="list-style-type: none"><li>- Understand our visitors and create products and experiences to meet their needs and expectations.</li><li>- Develop a visitor survey to identify opportunities to improve the visitor experience as well as measure customer satisfaction.</li><li>- Work together to collect, share and analyse a range of data.</li></ul>
<b>Product &amp; Experience Development</b>	<ul style="list-style-type: none"><li>- Adopt innovative ways to meet customer requirements.</li><li>- Work together to ensure a more joined up approach to product and experience development across Angus.</li><li>- Review all aspects of the customer journey and identify areas for development.</li><li>- Improve the online visibility of products &amp; experiences across Angus.</li><li>- Maximise the opportunities around the national theme years, as well as significant local anniversaries.</li></ul>
<b>Marketing</b>	<ul style="list-style-type: none"><li>- Work together to deliver the Visit Angus destination marketing campaign.</li><li>- Use data and insights to inform Visit Angus and increase engagement across digital channels.</li><li>- Align campaign activity to specific visitor profiles and identify the most effective channels to reach them.</li><li>- Engage with the regional and national campaigns, to maximise the value for Angus.</li></ul>

## Implementation, Review and Monitoring

An industry lead and working groups are in place for each strategic theme.

In addition, the following measures will be used to monitor and evaluate activity;

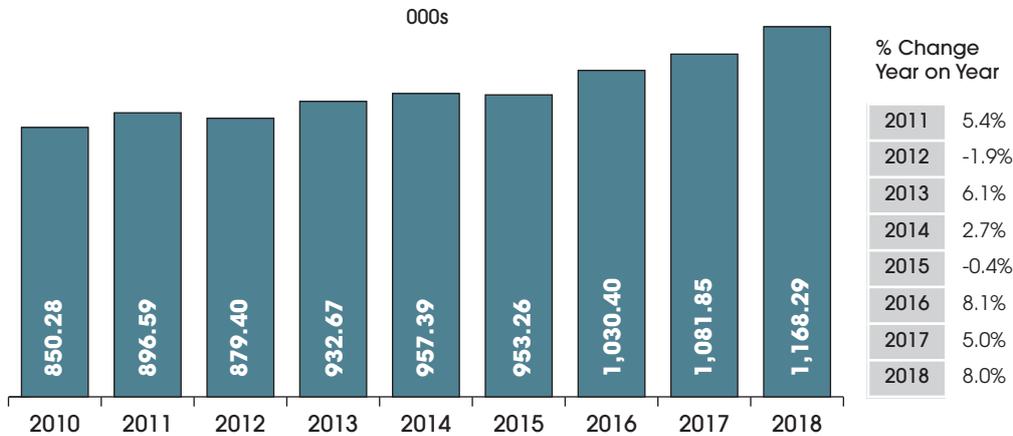
- Scottish Tourism Economic Activity Monitor (STEAM) (see below)
- Local Tourism Industry Barometer
- Visitor survey
- Visit Angus Digital Analytics

The figures below are indexed, to allow an accurate year on year comparison.

### Economic Impact - Indexed - total

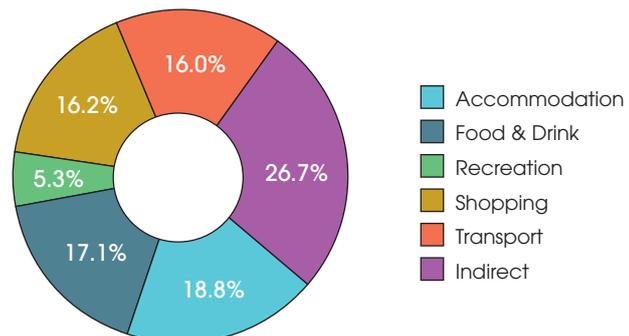


### Visitor Numbers - total



### Sectoral Distribution of Employment - FTEs

Sectors	2018	2010	+/- %
Accommodation	729	734	-0.7%
Food & Drink	666	561	18.7%
Recreation	204	161	26.4%
Shopping	629	529	19.0%
Transport	620	539	15.1%
Total Direct	2,848	2,524	12.8%
Indirect	1,035	807	28.2%
TOTAL	3,883	3,331	16.6%



Source: Scottish Tourism Economic Activity Monitor (STEAM)