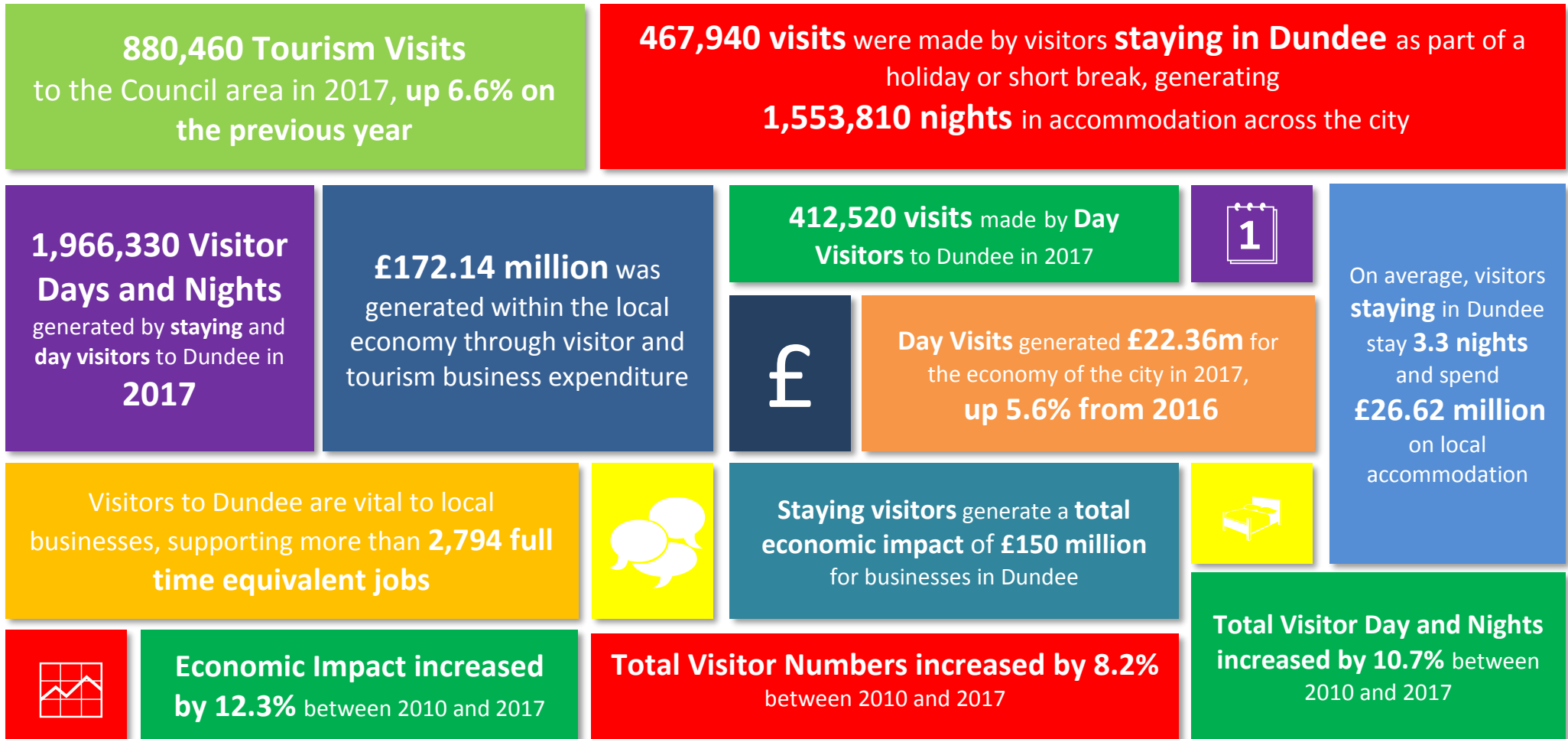




Dundee City Council's Visitor Economy 2017

This is a summary of the tourism trends research undertaken for Dundee City Council by Global Tourism Solutions (UK) Ltd.



2009
2017

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

53% of Visits

Day Visitors

47% of Visits

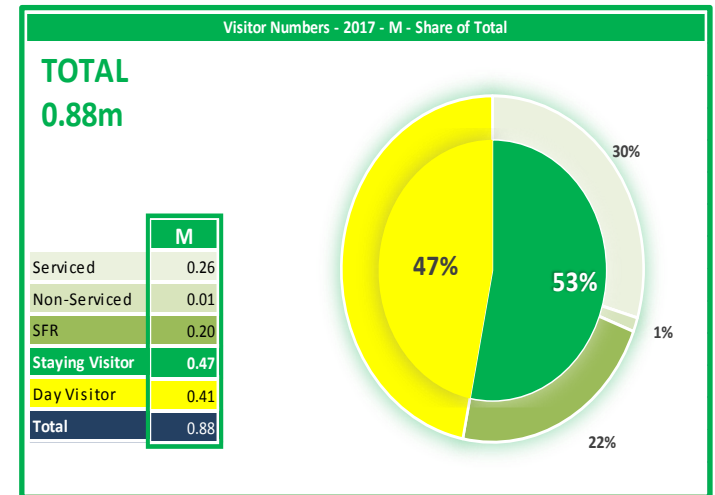
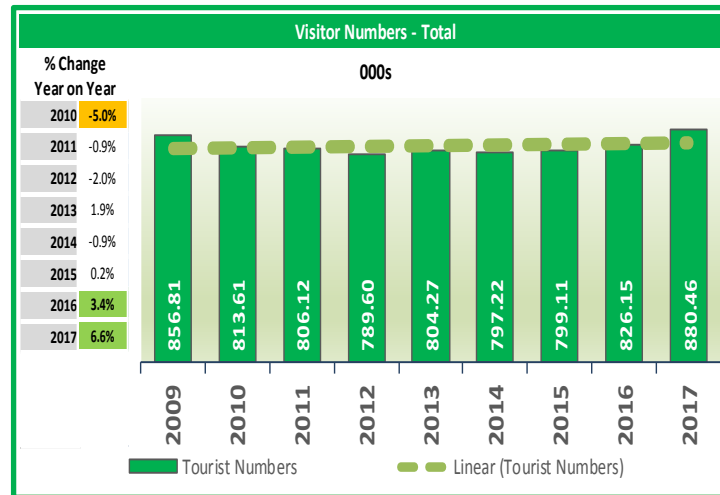
Total
Visitor
Numbers
880,460

Visitor Numbers

In 2017, there were an estimated 880,460 tourism visits to Dundee; representing an increase of 6.6% on the previous year. Overall, 53% of all visitors (467,940) stayed in the city for one or more nights. The remaining 47% of visitors (412,520) are Day Visitors to the city, including cruise ship passengers whose numbers are steadily increasing year-on-year. Visitor numbers, along with visitor days and expenditure, all increased in 2017.

Within the staying visitors sector,

those staying in serviced accommodation represent the majority of staying visitors at 30%, and displayed a 18.4% increase in numbers over the previous year. **Day Visitors numbers to Dundee are now at 412,520, a record high since numbers began to be tracked within this report in 2009, and have grown steadily by 5.3% since 2011.**



Key Figures: Visitor Numbers

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2017	000s	260.21	11.61	196.11	467.94	412.52	880.46
2016	000s	219.74	11.25	195.26	426.26	399.89	826.15
Change 16/17	%	18.4	3.2	0.4	9.8	3.2	6.6

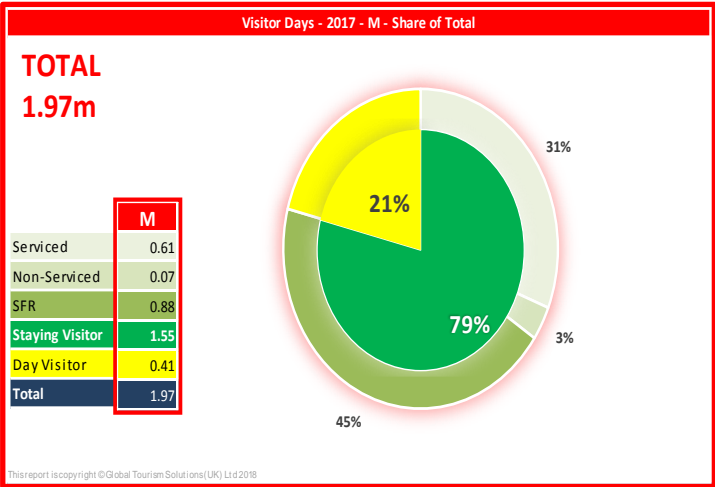
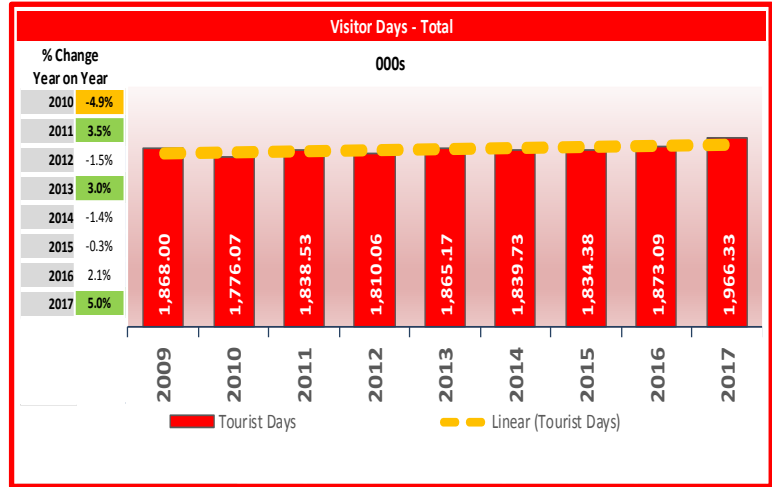
**Total
Visitor
Days**
1,966,330

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 account for five visitors, and fifteen visitor days. **Visitors to Dundee spent an estimated 1,966,330 days in the city as part of a tourism day trip, holiday or short break in 2017; this represented a rise of 5.0% on the previous year.**

Staying visitors account for almost eighty percent of all

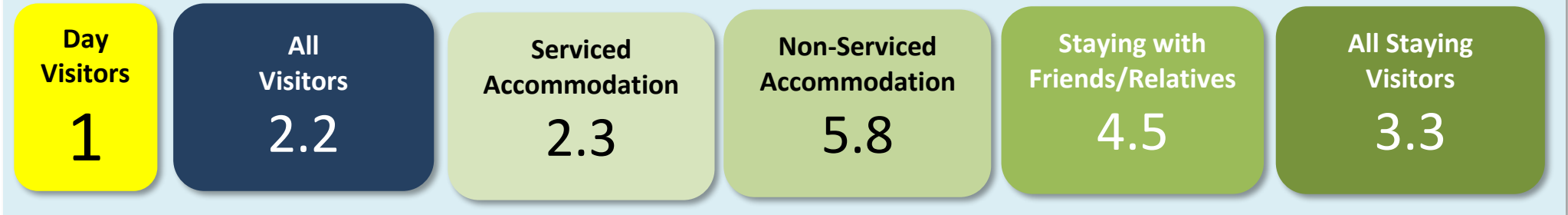
visitor days, with serviced accommodation accounting for 31% of the total. **Since 2010 visitor days for day visitors and staying visitors have increased gradually over the years by 10.7%.** The average length of stay for all staying visitors is 3.3 days; for serviced accommodation 2.3 days; and for the small non-serviced sector in Dundee, 5.8 days.



Key Figures: Visitor Days

Visitor Days		Served	Non-Served	SFR	Staying Visitors	Day Visitors	All Visitors
2017	000s	609.86	697.44	876.51	1,553.81	412.52	1,966.33
2016	000s	533.15	69.89	870.17	1,473.20	399.89	1,873.09
Change 16/17	%	14.4	-3.5	0.7	5.5	3.2	5.0

Average length of stay in days for different visitor types to Dundee in 2017



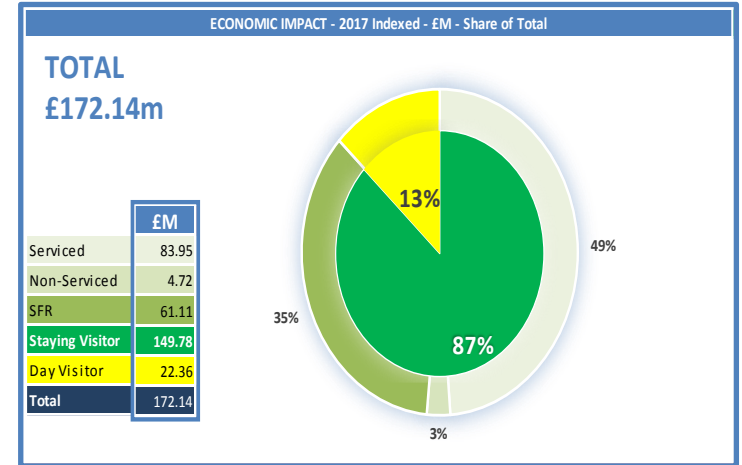
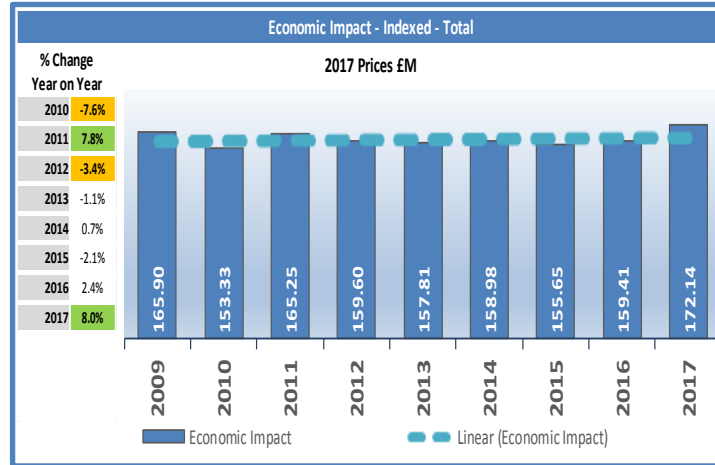
Total Economic Impact
£172.14m

Economic Impact

Tourism visits to Dundee in 2017 generated a total economic impact of £172.14m, an increase of 10.8% on 2016, and a gradual increase of 12.3% since 2010 (all monetary figures unless stated, in this narrative report are indexed to allow direct comparison). The total economic impact in 2017 comprises the expenditure of visitors on goods and services, totalling £128.89m, and the indirect and induced economic effects of local businesses and residents spending tourism revenues locally, accounting for a further £43.25m.

The greatest gain in economic since 2010 took

place within the small but growing non-serviced sector, which increased by 28.7%. Over the past year, the day visitor economic impact increased by 5.6%, all staying visitors by 11.6%. The average spend per visitor per day to Dundee is £87.54; per Day Visitor is £54.20 and in serviced accommodation is £137.66 per day and £316.61 per visit.



Key Figures: Economic Impact (un-indexed)

Economic Impact		Served	Non-Served	SFR	Staying Visitors	Day Visitors	All Visitors
2017	£m	83.95	4.72	61.11	149.78	22.36	172.14
2016	£m	70.65	4.87	58.70	134.21	21.17	155.38
Change 16/17	%	18.8	-3.1	401	11.6	5.6	10.8

Average economic impact generated per person by each type of visitor in 2017

Day Visitors £54.20 per Day	Staying with Friends and Relatives £69.71 per Day £313.74 per Visit	All Visitors £87.54 per Day £192.60 per Visit	Non-Serviced Accommodation £69.93 per Day £405.59 per Visit	All Staying Visitors £96.40 per Day £318.11 per Visit	Serviced Accommodation £137.66 per Day £316.61 per Visit
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**Total
FTEs
Supported
in 2017
2,794**

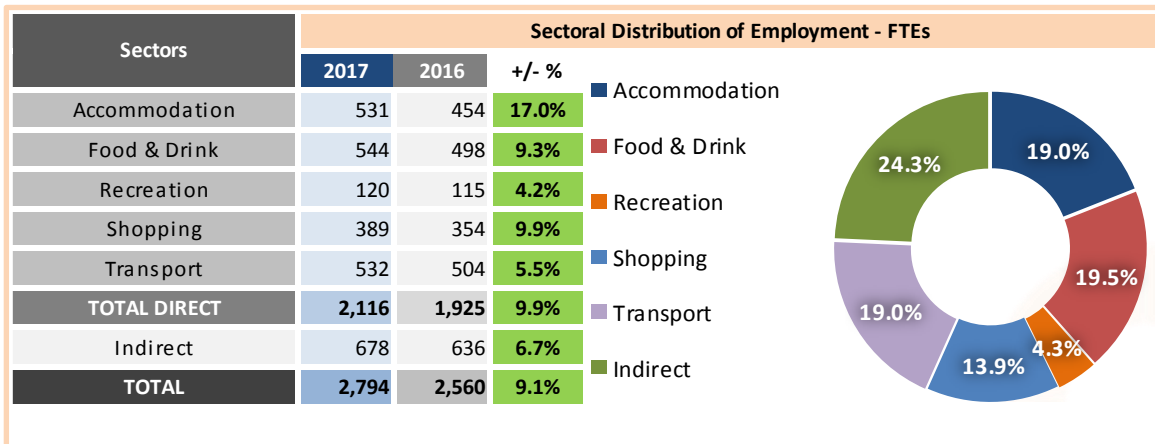

Definitions:

- **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.

Employment Supported by Tourism

The expenditure and activity of visitors to Dundee City in 2017 supported a total of 2,794 Full-Time Equivalent jobs (FTEs), an increase of 9.1% on the previous year, and an increase of 9.8% since 2010. Employment has remained stable since 2010, with modest gains being seen within the transport, food & drink and shopping sub-categories, with larger gains across all categories in 2017. Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 2,116 FTEs in 2017, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 678 FTEs. **The three largest sectors for direct employment were Food & Drink (544 FTEs); which for the first time eclipsed Transport (532 FTEs); Accommodation (531 FTEs) and then Shopping (389 FTEs).**

Employment Supported by Tourism 2017: Full-Time Equivalents (FTEs) by Type

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