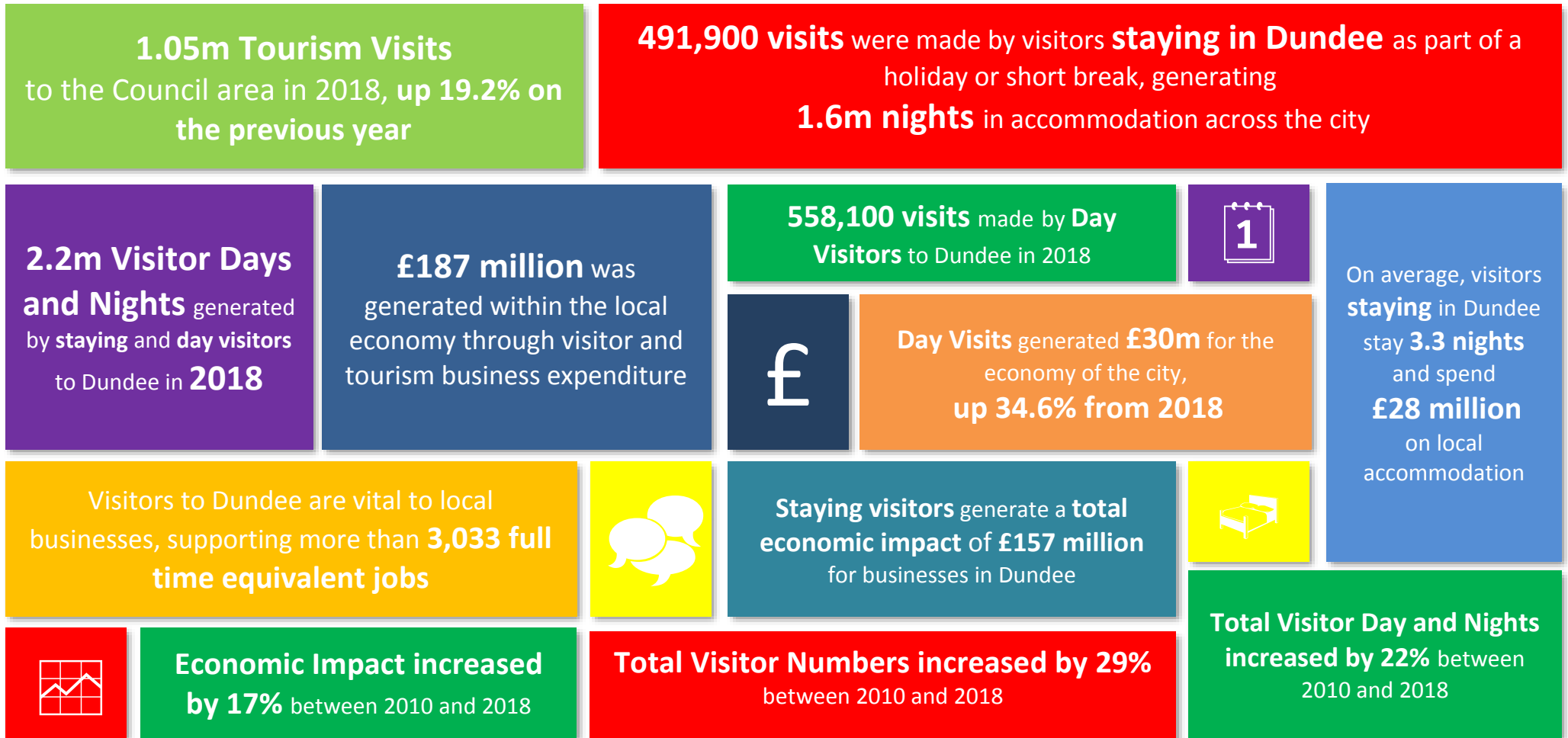




Dundee City Council's Visitor Economy 2018

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



2009
2018

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

47% of Visits

Day Visitors

53% of Visits

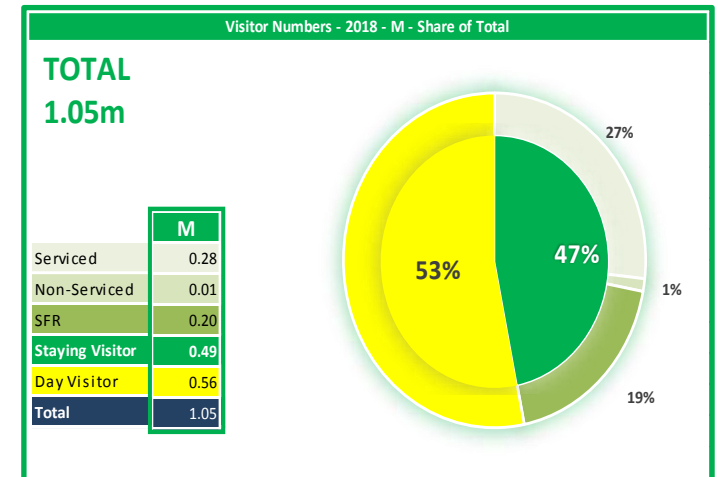
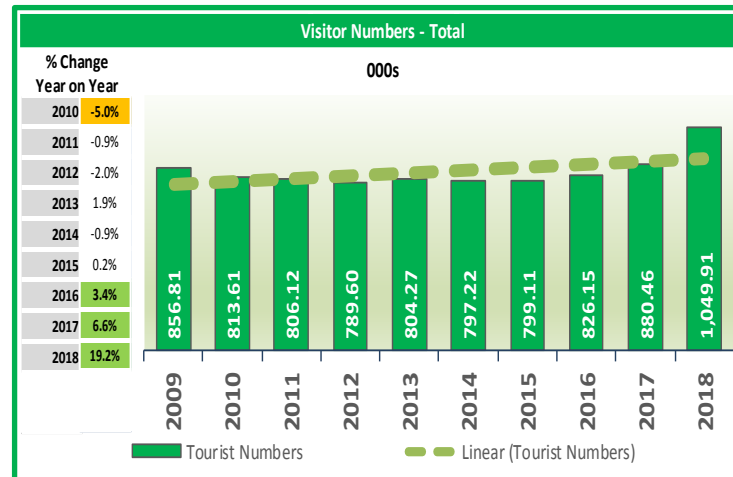
Total
Visitor
Numbers
1.05

Visitor Numbers

In 2018, there were an estimated 1,049,910 tourism visits to Dundee; representing an increase of 19.2% on the previous year. Overall, 47% of all visitors (.49m) stayed in the city for one or more nights. The remaining 53% of visitors (.56m) were Day Visitors to the city, including cruise ship passengers whose numbers are steadily increasing year-on-year. **Open in September, the impact of the Victoria & Albert Museum of Design is seen through increase in visitors to over a million for the**

first time, and an increase in Day Visitors who are up 35.3% over the previous year.

In the last quarter (Oct-Dec 2018), total visitor numbers to Dundee increased by 36.2%, visitors staying in serviced accommodation rose by 18.3% and Day Visitors increased substantially by 75.8%.



Key Figures: Visitor Numbers

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2018	Ms	0.281	0.013	0.198	0.492	0.558	1.050
2017	Ms	0.260	0.012	0.196	0.468	0.413	0.880
Change 17/18	%	8.0	10.6	1.0	5.1	35.3	19.2

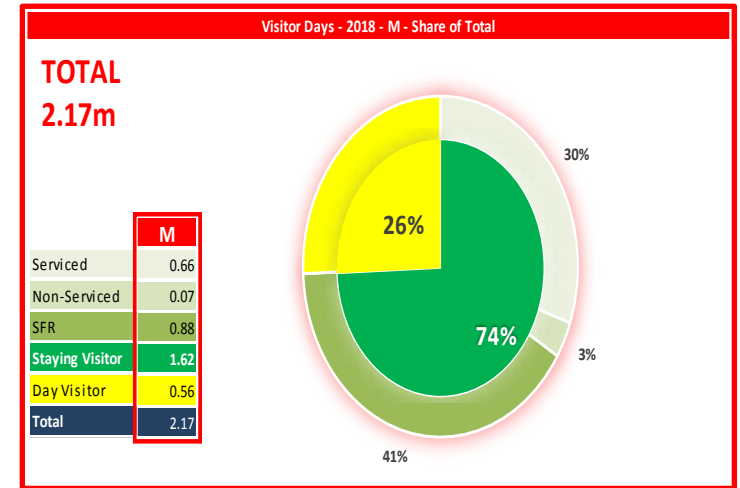
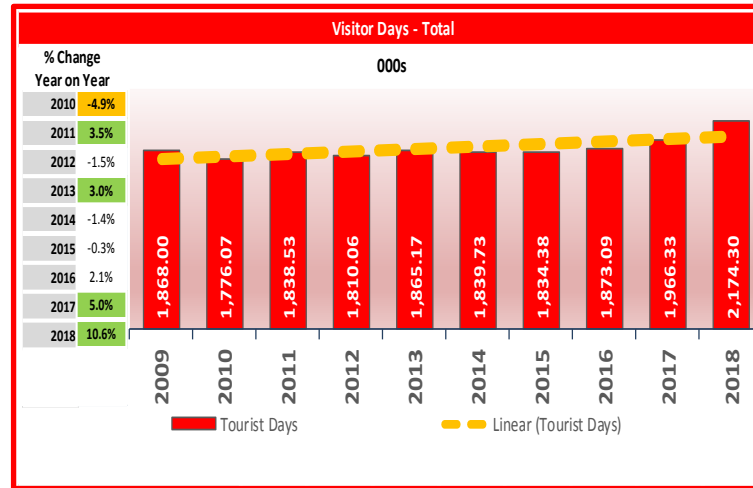
**Total
Visitor
Days**
2.17m

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 2,174,300 days in the city as part of a tourism day trip, holiday or short break in 2018; this represented a rise of 10.6% on the previous year, and 19% in the last quarter.**

**Staying visitors
accounted for
74% of all visitor
days, with**

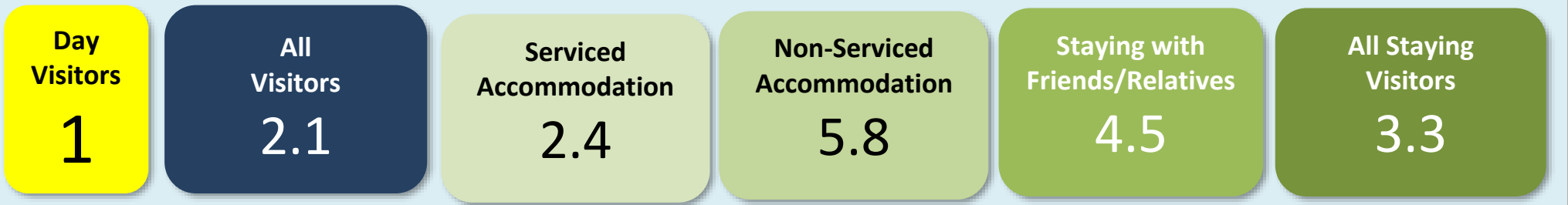
serviced accommodation accounting for 30% of the total. **Since 2010 visitor days for day visitors and staying visitors have increased gradually over the years by 22%.** The average length of stay for all staying visitors is 3.3 days; for serviced accommodation 2.4 days; and for the small non-serviced sector in Dundee, 5.8 days.



Key Figures: Visitor Days

Visitor Days		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2018	Ms	0.660	0.075	0.881	1.616	0.558	2.174
2017	Ms	0.610	0.067	0.877	1.554	0.413	1.966
Change 17/18	%	8.3	10.7	0.5	4.0	35.3	10.6

Average length of stay in days for different visitor types to Dundee in 2018



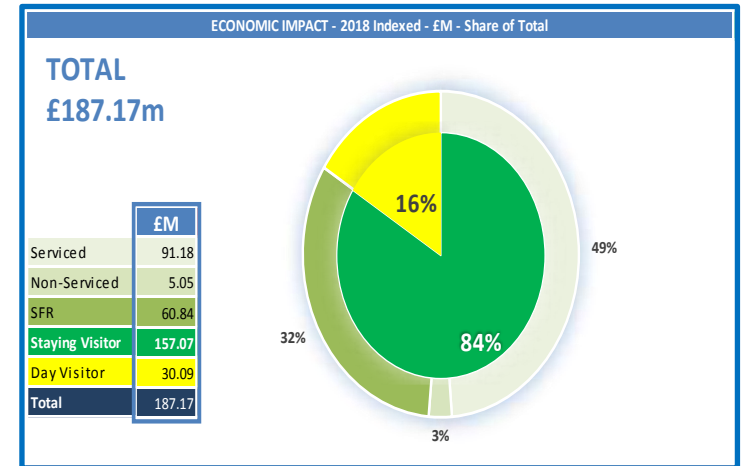
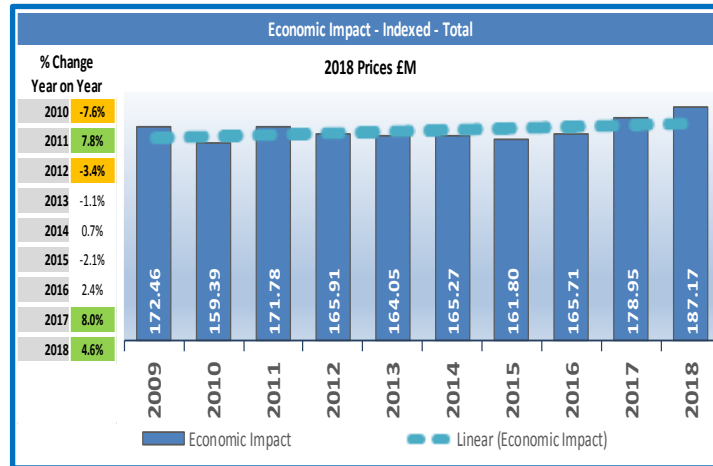
Total Economic Impact
£187.17m

Economic Impact

Tourism visits to Dundee in 2018 generated a total economic impact of £187.17m, an increase of 8.7% on 2017, and a gradual increase of 17% since 2010 (all monetary figures, unless stated, in this narrative report are indexed to allow direct comparison). The total economic impact in 2018 comprises the expenditure of visitors on goods and services, totalling £140.05m, and the indirect and induced economic effects of local businesses and residents spending tourism revenues locally, accounting for a further £47.11m.

In the last quarter (Oct-Dec 2018), since the

V&A Museum of Design opened, total economic impact increased by 15.1%; within the serviced sector it rose by 13.3% and within the Day Visitors sector it rose substantially by 69.1%. The average spend per visitor per day to Dundee is £86.10; per Day Visitor is £53.93; and in serviced accommodation is £138.15 per day and £331.56 per visit.



Key Figures: Economic Impact (un-indexed)

Economic Impact		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2018	£m	91.18	5.050	60.84	157.07	30.09	187.17
2017	£m	83.95	4.716	61.11	149.78	22.36	172.14
Change 17/18	%	8.6	7.1	-0.4	4.9	34.6	8.7

Average economic impact generated per person by each type of visitor in 2018



**Total
FTEs
Supported
in 2018
3,033**

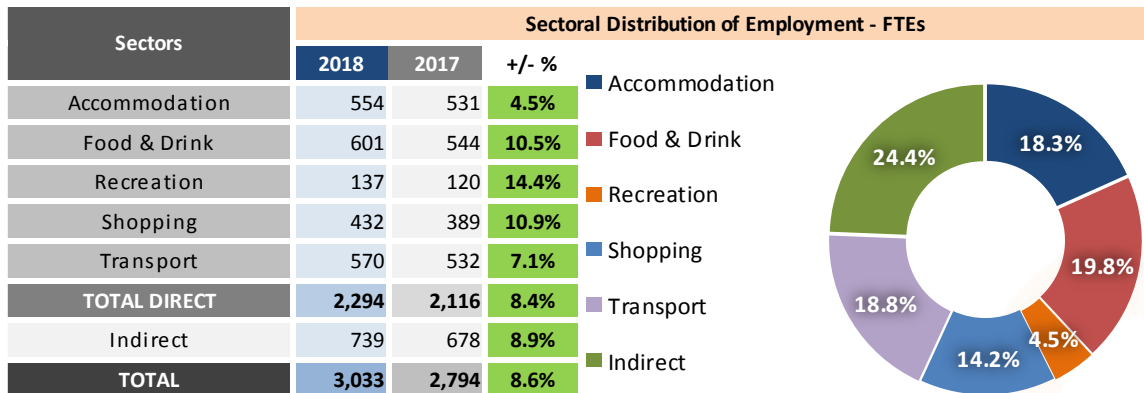
Definitions:

- **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 2018 supported a total of 3,033 Full-Time Equivalent jobs (FTEs), an increase of 8.6% on the previous year, an increase of 19.2% since 2010, and an increase of 18.8% in the last quarter of 2018. 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 and 2018. Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 2,294 FTEs in 2018, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 739 FTEs. **The largest sectors for direct employment remains Food & Drink (601 FTEs); followed by Transport (570 FTEs); Accommodation (554 FTEs) and then Shopping (432 FTEs).**

Employment Supported by Tourism 2018: Full-Time Equivalents (FTEs) by Type



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 2019