



Insight Department:  
Dundee and Angus Factsheet | 2019

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# Introduction

## Background Information and Aim

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This report provides a summary of statistics on tourism in Scotland's Dundee and Angus region. It gathers information from a suite of tourism monitors managed by VisitScotland's Insight Department, and other national statistics and commissioned research.

Most of the statistics are produced from surveys. The primary surveys used are:

- **The Great Britain Tourism Survey** (GBTS) that provides data for overnight visitors resident in Scotland, England and Wales. The survey is conducted through face-to-face interviews and is jointly commissioned by VisitScotland, VisitEngland and VisitWales. More information about the survey can be found on [visitbritain.org](http://visitbritain.org).
- **The International Passenger Survey** (IPS) which is run by the Office for National Statistics (ONS). This survey provides data for overseas visitors. Details about the survey and methodology used can be found on the ONS website and the VisitBritain website.  
**Please note:** In 2020, the methodology of IPS was revised to represent more accurately international visitors and all data was recalculated back to 2009. As a result, international figures in this report might differ from, and supersede, previously published IPS data.
- **The Great Britain Day Visits Survey** (GBDVS) that provides data for tourism day visitors resident in Scotland, England and Wales. More information about the survey can be found on [visitbritain.org](http://visitbritain.org).
- **The Scottish Accommodation Occupancy Survey** (SAOS) that provides data on occupancy in Scotland's tourist accommodation sectors.

While results from these surveys can give good precision at national level, at regional level they can be less reliable because they can be based on a relatively small sample size. This incurs a larger margin of statistical error reducing data reliability. Therefore results should be treated with caution.

To reduce error margins, it is sometimes useful to take an average over three years to provide a larger sample size. In this report, 3-year average figures have been calculated to provide a more robust basis for analysis of detailed data such as visitors' region of residence, purpose of travel, or seasonality of trips.

Annual visitor figures are provided on pages 6 and 7, as well as in the form of a historical trend chart on page 9. These ensure the publication is consistent with other regional factsheets published on [visitscotland.org](http://visitscotland.org) and indicate changes in tourism performance over time. Yet, it is recommended to refer to the 3-year average figures on page 3 when analysing volume and value of tourism in the region.

There are some differences between regions as identified by the GBTS and GBDVS, IPS, and SAOS.

This report starts with an **overall** evaluation of Dundee and Angus tourism performance in 2019. It then looks in more detail into the **international** and **domestic** overnight visitors to the region. Lastly, the report focuses on tourism day visits and the historical trend of tourism performance in the region since 2013.

### Sources

- Great Britain Tourism Survey (GBTS) 2019
- International Passenger Survey (IPS) 2019
- Great Britain Day Visits Survey (GBDVS) 2019
- Scottish Accommodation Occupancy Survey (SAOS) 2019
- Moffat Centre Visitor Attraction Monitor (VAM) 2019
- Scottish Annual Business Statistics (SABS): Sustainable Tourism by Local Authority Area 2018

# I. Overall Tourism in Dundee & Angus

## Latest Figures

The RRS Discovery and the V&A Dundee  
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### Overall Tourism Summary: Visits, Nights and Spend in Dundee & Angus, 2017-2019 Annual Average Figures

VISITS BREAKDOWN	Visits		Nights		Spend	
	2017-19 Average (000s)	% Change 2016-18/ 2017-19	2017-19 Average (000s)	% Change 2016-18/ 2017-19	2017-19 Average (£m)	% Change 2016-18/ 2017-19
Europe	40	-11%	318	+34%	17	+27%
North America	21	0%	80	-54%	11	-9%
Rest of World	14	-7%	192	+17%	11	+13%
<b>Total International Overnight</b>	<b>74</b>	<b>-9%</b>	<b>590</b>	<b>+3%</b>	<b>39</b>	<b>+11%</b>
Scotland	202	+7%	526	+6%	33	+15%
Rest of Great Britain	144	-2%	497	-18%	35	+4%
<b>Total Domestic Overnight</b>	<b>346</b>	<b>+3%</b>	<b>1,023</b>	<b>-7%</b>	<b>69</b>	<b>+10%</b>
<b>Total Overnight Tourism</b>	<b>420</b>	<b>+1%</b>	<b>1,613</b>	<b>-4%</b>	<b>108</b>	<b>+10%</b>
<b>Total Day Tourism</b>	<b>7,553</b>	<b>-4%</b>	<b>N/A</b>	<b>N/A</b>	<b>206</b>	<b>+3%</b>
<b>Grand Total</b>	<b>7,973</b>	<b>-4%</b>	<b>1,613</b>	<b>-4%</b>	<b>315</b>	<b>+5%</b>

Sources: IPS/GBTS/GBDVS, 2017-19. Figures may not sum up due to rounding.

National figures are available in the *Key Facts on Tourism in Scotland 2019* report published on [visitscotland.org](https://visitscotland.org).

# Visitors to Dundee & Angus

## Tourism Performance | 2019

Annual data suggests big **increases in the volume and value** of overnight tourism to Dundee and Angus from 2018 when they were at their lowest in half a decade. Total number of trips and overnight expenditure in 2019 were at their **highest since 2013**. While this growth was mostly driven by British travellers to the region, international spend estimates also indicate a significant rise.

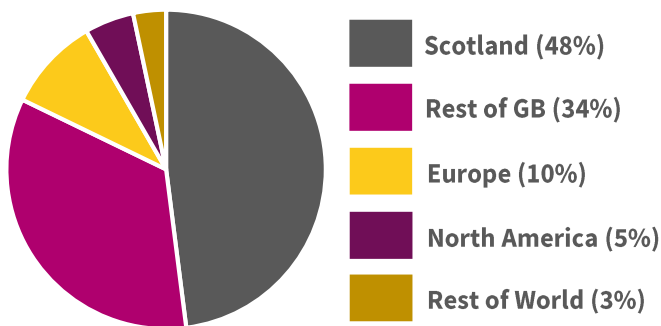
Between 2017 and 2019, Dundee and Angus welcomed **420,000 overnight visits** per year on average. The annual number of **bednights** was **1.6 million**, and associated tourism spend **£108 million** per year. These figures represent a 1% increase in trips and 10% growth in spend from 2016-2018. Bednights decreased by 4% over the same period due to the record-high number of nights spent by domestic visitors to the region in 2016.

Nearly half of all trips and a third of the total overnight spend in Dundee and Angus in 2017-2019 were made by **residents of Scotland**. While tourism expenditure increased across most markets, Scotland residents were the sole driver behind the rise in visits from 2016-2018.

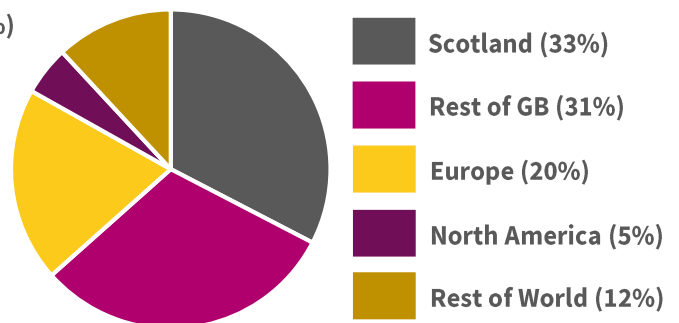
International visitors made 18% of all overnight visits to Dundee and Angus between 2017 and 2019. Most of these were undertaken by **European** residents who on average stayed longer and spend more money in the region compared to 2016-2018.

Domestic day tourism trips to Dundee and Angus were **7.6 million** per year in 2017-2019. Day tourism expenditure rose by 3% to reach **£206 million** annually over the same period.

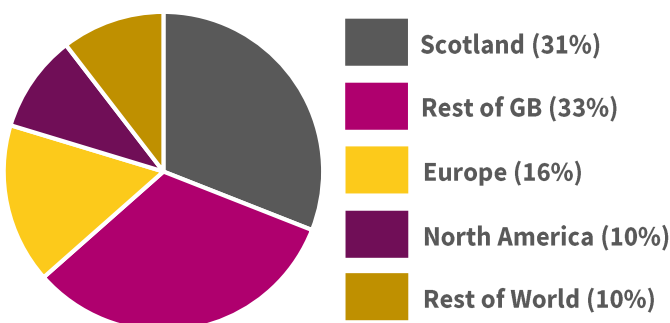
### Overnight Visits



### Nights



### Overnight Spend



Sources: GBTS/IPS, 2017-19. Figures may not sum up due to rounding.

# Regional Tourism Performance

## Local Statistics

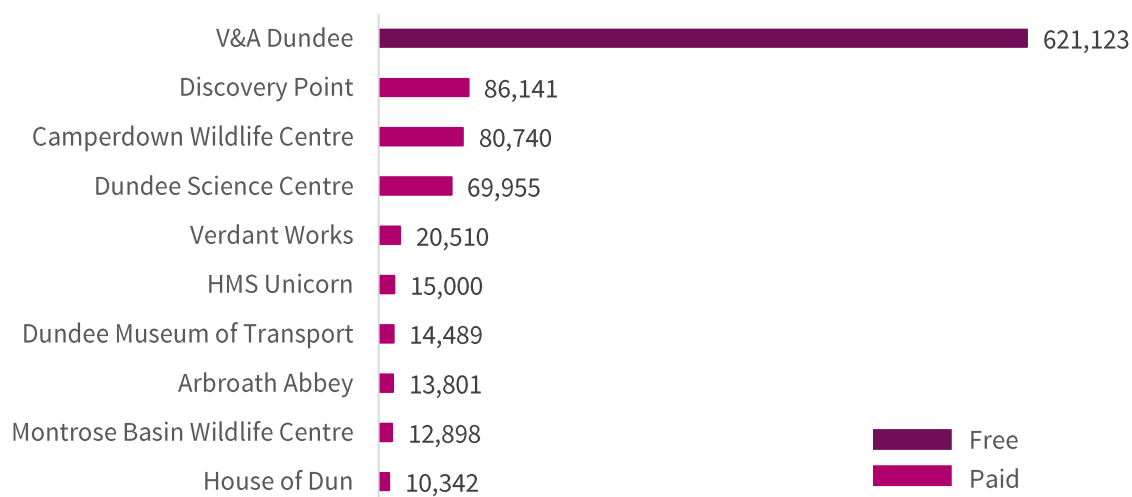
### Regional Sustainable Tourism\* – Business Units, Employment and Gross Value Added, 2018

Local Authority/ Region	Units		Employment		GVA	
	Number	% Change 2017/18	(000s)	% Change 2017/18	(£m)	% Change 2017/18
Angus	358	+3%	3.2	-3%	51.0	-20%
Dundee	448	+3%	5.5	+2%	90.3	-13%
<b>Dundee &amp; Angus</b>	<b>806</b>	<b>+3%</b>	<b>8.7</b>	<b>0%</b>	<b>141.3</b>	<b>-16%</b>

Source: SABS, 2018. Figures may not sum up due to rounding. For more information, visit [visitscotland.org](http://visitscotland.org).

\*The Scottish Government defines sustainable tourism as a growth sector including a number of business types [detailed on their website](#). Latest statistics were published on 24<sup>th</sup> June 2020 and cover the period up to 2018.

### Top Ten Visitor Attractions in Dundee and Angus (with Visitor Numbers), 2019



Source: Moffat Centre Visitor Attraction Monitor, Glasgow Caledonian University, 2019.

VAM is solely owned and distributed by Glasgow Caledonian University Moffat Centre. If you are interested in participating in the accompanying survey or subscribing to the publication, please contact [info@moffatcentre.com](mailto:info@moffatcentre.com).

### Occupancy Rates by Accommodation Type and Month, Dundee & Angus 2019

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Hotel (Room Occ.)	56%	66%	75%	70%	76%	78%	75%	85%	81%	73%	58%	50%	<b>70%</b>
Guest House/B&B (Room Occ.)	7%	20%	20%	32%	25%	47%	42%	49%	51%	26%	15%	15%	<b>30%</b>
Self-Catering (Unit Occ.)	40%	57%	61%	72%	55%	67%	69%	77%	73%	55%	23%	35%	<b>57%</b>

Source: SAOS, 2019.

## II. International Visitors to Dundee & Angus Overnight Tourism

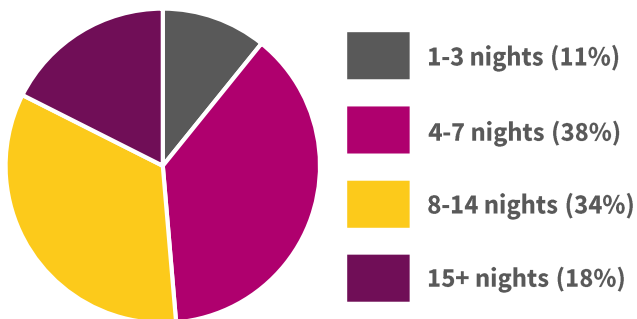
International visitors made **74,000 trips** per year to Dundee and Angus in 2017-2019. While this marks a 9% drop from 2016-2018, figures suggest a significant rise in travellers from 2018 when numbers plunged. **Bednights** and tourism **expenditure** both **grew** in 2017-2019 indicating increases in average length of stay (**8 nights**) and spend per visit (£531). The significant average length of stay of overseas visitors to Dundee and Angus is underlain by the **high proportion of VFR trips** – 36% of all visits, the highest share across all of Scotland’s regions. There is a clear preference for summer travel to the region, with 52% of all trips in 2017-2019 occurring between July and September.

### International Tourism Performance, 2019 and 2017-19 Annual Average Figures

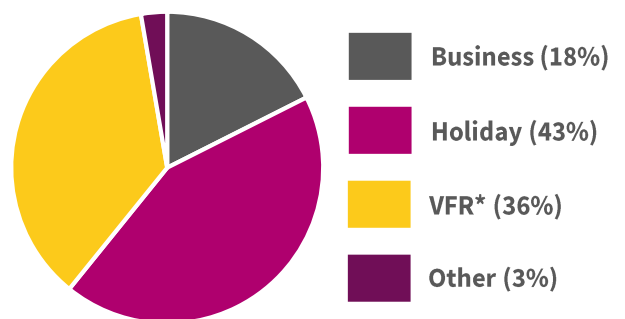
Indicators	Scotland		Dundee & Angus			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019*	% Change 2018/19	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	3,460	-7%	69	+21%	74	-9%
Spend (£M)	2,538	+7%	47	+49%	39	+11%
Nights (000s)	27,385	+8%	780	+89%	590	+3%
Average length of stay	7.9 nights	+16%	11.3 nights	+56%	8 nights	+12%
Average spend per day	£93	0%	£61	-21%	£67	+8%
Average spend per visit	£734	+15%	£684	+23%	£531	+22%

Source: IPS, 2019. \*Annual Dundee & Angus data is based on low sample sizes.

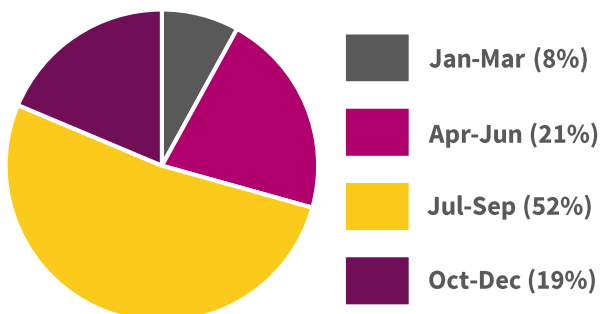
#### Duration of Stay



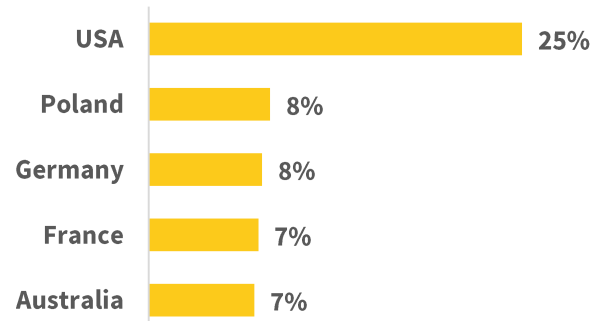
#### Purpose of Travel



#### Seasonality



#### Top 5 Overseas Markets



Source: IPS. All charts are based on 3-year average data (2017-2019). Figures may not sum up due to rounding. Top Markets chart is based on very low sample sizes. \*VFR = Visiting friends or relatives.

# III. Domestic Visitors to Dundee & Angus

## Overnight Tourism

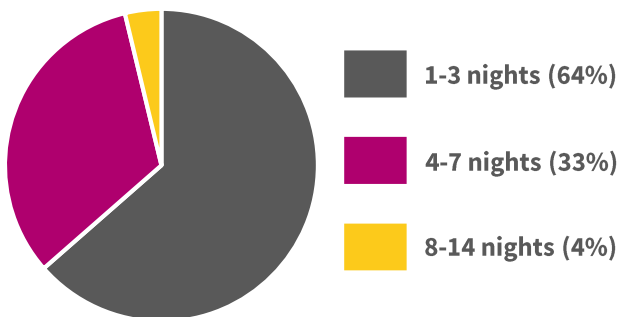
Between 2017 and 2019, British residents made **346,000 overnight trips** per year to Dundee and Angus, spending just over a **million nights** and **£69 million** annually. The average domestic visitor spent 3 nights and nearly £200 in the region. More than half of all trips were undertaken by holidaymakers. **Business trips** accounted for a fifth of all visits which is significantly above the national average of 13%. It is interesting to note that the seasonal spread of British trips to the region differs drastically from the one of overseas visits. Between 2017 and 2019, the **last quarter** of the calendar year attracted the most domestic trips (32% of all), while spring was the second most popular season to visit.

### Domestic Overnight Tourism Performance, 2019 and 2017-19 Annual Average Figures

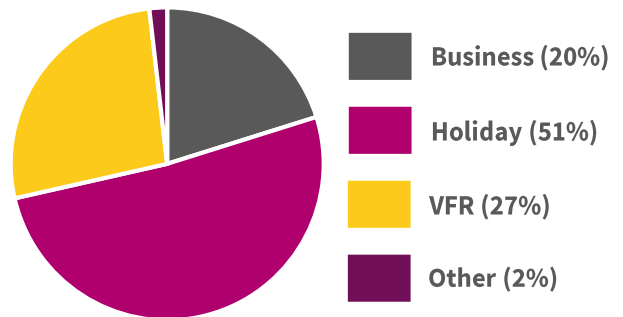
Indicators	Scotland		Dundee & Angus			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019*	% Change 2018/19	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	13,810	+17%	433	+56%	346	+3%
Spend (£M)	3,200	+16%	91	+78%	69	+10%
Nights (000s)	46,413	+15%	1,196	+56%	1,023	-7%
Average length of stay	3.4 nights	-2%	2.8 nights	0%	3 nights	-10%
Average spend per day	£69	+1%	£76	+15%	£67	+18%
Average spend per visit	£232	-1%	£210	+15%	£199	+6%

Source: GBTS, 2019. \*Annual Dundee & Angus data is based on relatively low sample sizes.

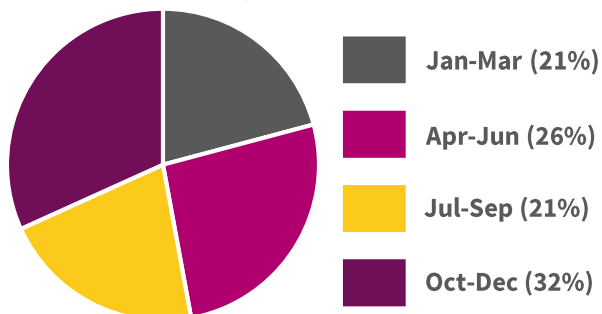
#### Duration of Stay



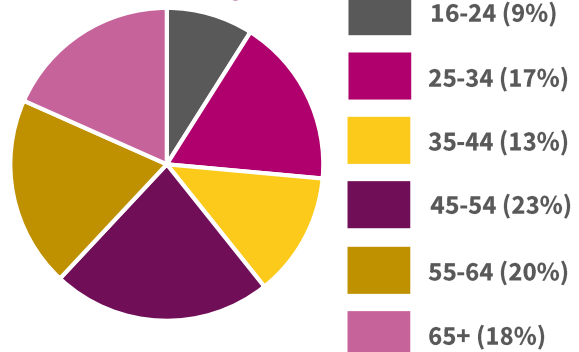
#### Purpose of Travel



#### Seasonality



#### Visitors' Age



Source: IPS. All charts are based on 3-year average data (2017-2019). Figures may not sum up due to rounding.

# Domestic Day Visits to Dundee & Angus

## Tourism Performance and Activities

### National and Regional Domestic Day Visit Tourism Performance, 2017-2019 Average Figures

	Visits		Spend	
	2017-19 Average (million)	% Change 2016-18/2017-19	2017-19 Average (£ million)	% Change 2016-18/2017-19
Scotland	140.8	-2%	5,749	+5%
Dundee & Angus	7.6	-4%	206	+3%
Angus	3.4	+4%	44	+7%
Dundee	4.1	-9%	162	+1%

Source: GBDVS. Figures may not sum up due to rounding.

### Most Popular Activities Undertaken as Part of a Day Trip, Dundee & Angus: 2016-18 Average Annual Figures (Number of Day Trips in Millions)



Source: GBDVS.



Vintage Tour Bus at Glamis Castle  
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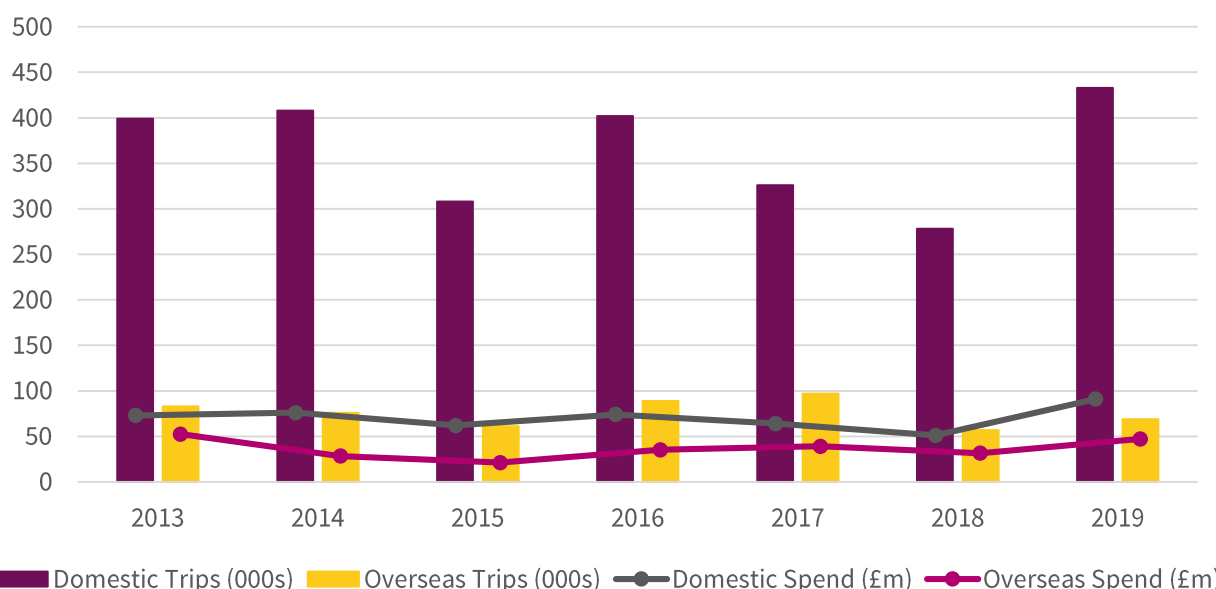


# Visitors to Dundee & Angus

## Historical Trend Information | 2013 - 2019

Annual data suggests that 2019 was the **best year for overnight tourism** to Dundee and Angus **since 2013**. This was mostly result of a strong performance of the **domestic** market where, following two consecutive years of decline, total visits and spend reached their **highest in seven years**. International trips were below their average for 2013-2018. Despite that, associated overseas spend notably exceeded the average for the same period. A comparison between the 2014-2016 and the 2017-2019 periods reveals a 6% drop in the total number of overnight visits and a 9% growth in the total tourism expenditure in the region, indicating **rising average spend** of visitors.

### Domestic and International Overnight Tourism, 2013-2019



Sources: GBTS, IPS.

### Domestic and International Overnight Visits, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (000s)	399	408	308	402	326	278	433
International (000s)	83	76	61	89	97	57	69
Total Overnight (000s)	482	484	369	491	423	335	502

Sources: GBTS, IPS.

### Domestic and International Overnight Spend, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (£m)	73	76	62	74	64	51	91
International (£m)	52	28	21	35	39	32	47
Total Overnight (£m)	125	104	83	109	103	83	138

Sources: GBTS, IPS.



## Appendix

### USING AND INTERPRETING STATISTICAL DATA

Sources: Data is sourced from the Office for National Statistics' International Passenger Survey (IPS), The Great Britain Tourism Survey (GBTS), The Great Britain Day Visits Survey (GBDVS), Scottish Accommodation Occupancy Survey (SAOS), Moffat Centre's Scottish Visitor Attraction Monitor (VAM) and ONS' Scottish Annual Business Survey (SABS).

### SAMPLE SIZES

Analysis of sub-groups, such as trips by purpose or demographic group, relies on smaller sample sizes that can be unreliable. Where this is a particular issue, methods to aggregate data, such as using a 3-year average instead of single-year data, have been used. Before using the data, it is important to recognise the limitations of using a small sample size. Further information, including methodology and sample sizes, can be found on the VisitBritain website [www.visitbritain.org](http://www.visitbritain.org) (Insights & Statistics section).

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