

Tay Cities Region

ANGUS | DUNDEE | NORTH EAST FIFE | PERTH AND KINROSS

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Tourism Strategy 2019 – 2024



Introduction

Over the coming years, the four distinct areas that line the River Tay - Angus, Dundee, North East Fife, Perth and Kinross - have a significant opportunity to collectively grow the volume and value of tourism to the Tay Cities Region. Few areas of Scotland share the density and diversity of our visitor experiences, and we can be proud of the high quality of life that visitors and local residents enjoy. With this first Tay Cities Region Tourism Strategy we want to ensure that the sector is playing its part in delivering the Tay Cities Regional Economic Strategy by supporting businesses, generating employment and capitalising on new developments, all of which will help enhance our common strengths for the benefit of communities across the whole region.

Visitor arrivals (particularly from overseas) are increasing in Scotland. Visitors from all over the world are seeking transformative cultural experiences, deep and meaningful connections with Scottish culture, high-quality food and drink and fresh air in the great outdoors. Fortunately, the creative industries, food and drink and outdoor adventures are all major strengths for our region. Building on these assets and enhancing the quality of what we offer visitors under these 'connector' themes will enable us to attract more visitors to the region as a whole, turn day visits into extended stays and increase visitor spend.

In recent years, other destinations in Scotland have benefitted from a team approach to tourism development and marketing, driven by strong industry leadership, helping to stimulate economic development and provide the basis for sustained growth. For this reason, we're taking a new approach to developing tourism in the Tay Cities Region from the start. A broad range of voices from across the tourism industry in the Tay Cities Region have helped to shape the ambitions and priorities in this strategy. Collaboration and shared decision-making will define how we will implement this strategy too. We are taking a fresh, ambitious approach to developing the Tay Cities Region as an outstanding destination that encourages visitors to stay longer, explore and return on a regular basis, and we look forward to working together to deliver it.



TAY CITIES REGION MAP

The Tay Cities Region: facts & figures

- **Regional population: 500,000, 9% of Scotland's total**
- **1,580 businesses operate in the tourism sector, 12% of the region's total¹**
- **Across the region, the tourism sector employs 28,000 people²**
- **V&A Dundee is projected to attract up to 360,000 visits per year³**
- **During the 10 years to 2027, an additional £37 million will be invested in the tourism and cultural sectors as part of the Tay Cities Deal, subject to the approval of a business case⁴**

Tay Cities Tourism

- **In 2016 the Tay Cities Region welcomed 1,549,000 domestic overnight visitors (82% of overnight stays) and 333,000 international overnight visitors who spent a combined total of £433 million**
- **In the same year, the region received 19.36m day visitors, who spent a total of £603 million⁵**

A Vision for Tourism in the Tay Cities Region

Our vision

By 2024, tourism will play a greater role in the Tay Cities Region by supporting an inclusive, innovative, international, connected and empowered Tay Cities regional economy.

Our mission

To work collaboratively to strengthen tourism in the Tay Cities Region, ensuring regional and seasonal spread and a continued commitment to delivering quality visitor experiences for all.

Our strategic objectives

In order to grow the value of the visitor economy in the Tay Cities Region, our strategic objectives will be:

- 1. Grow the value of overnight stays across the region from £433m in 2016 to £550m in 2024 (approximately 3% growth year on year);**
- 2. Improve the all-round experience for visitors across the region;**
- 3. Address common challenges, such as connectivity, accessibility, seasonality and productivity.**

These objectives will be delivered using the shared values of collaboration, leadership, sustainable growth, quality of life and professional development; and we will achieve the ambition by seizing the new opportunities which working together will present. The result is a stronger, more competitive and more resilient tourism sector across the region that delivers jobs and prosperity to the many communities it touches.

In order to deliver the objectives, an action plan will be developed using the priorities for action below as a starting point and drawing on the broader list of actions provided in Appendix 2. To track progress of the strategy, a monitoring framework will be established. A number of key performance indicators (KPIs) are available and are shown in Appendix 1



Perthshire – Scottish Crannog Centre

Figure 1
**Overview of the Tay Cities Region
 Tourism Strategy**



A new basis for regional collaboration

Initiated by four local authorities (Angus Council, Dundee City Council, Fife Council and Perth & Kinross Council), Scottish Enterprise and VisitScotland, this strategy is the result of wide consultation with tourism industry organisations and individual businesses and attractions. It is presented with the full acknowledgement that its development and delivery will depend on sharing decision-making and responsibility across the tourism sector.

At the time of publication, a new structure is in the making to take this strategy and its development forward, led by the tourism industry and offering opportunities for tourism businesses of all sizes to have their say and contribute to delivering on this strategy.

The rationale for this strategy

The Tay Cities Region Tourism Strategy identifies common themes that link destinations across the region and sets out a roadmap on how to develop these themes in order to meet our objective of increasing the value of tourism to the region. Here, we outline the ways in which destinations across the region and their constituent businesses can seize opportunities and solve common challenges together, where there is clear rationale to do so. As a result, it is intended to support, and not supersede the work being done within Angus, Dundee, Fife and Perth and Kinross to develop individual destinations, deliver marketing campaigns or build networks of tourism stakeholders. In short, this strategy outlines ways in which the Tay Cities Region as a whole can become stronger through regional-level collaboration and planning.

Wherever our visitors go in the Tay Cities Region, it is important that they find a consistently high quality tourism experience that will encourage them to stay longer and spend more. The aim is to ensure that by taking a region-wide approach, we can ensure an all-round improved experience for our visitors and provide lasting economic and social benefits for communities across the region.

The Tay Cities Region visitor economy should:

- Contribute to an inclusive, innovative, international, connected and empowered Tay Cities Region
- Support economic growth and deliver fair, sustainable employment
- Help to develop the Tay Cities Region in a way that makes it an even more attractive place to live, work and visit, improving the prosperity and wellbeing of its residents

The regional approach to tourism development should:

- Strengthen our product offer in a way that capitalises on our strengths as a region and contributes to sustainable growth across the region
- Complement and enhance local identity and the process of local destination development
- Be industry-led and offer widespread opportunities for businesses of all sizes to be involved in decision-making and implementation



The Tay Cities Connectors

Our competitive strengths

Variety and density of attractions

Across the Tay Cities Region visitors can find a diverse range of natural scenery, food & drink, cultural events, landscapes and local traditions – all in close proximity to our major towns and cities. Our beautiful rural and coastal areas are within easy reach, helping both residents and visitors to escape from the city to access fulfilling time out.



The River Tay

The River Tay itself and its wider catchment area create a natural connector for the region. As well as flowing through dramatic countryside and two of the UK's best small cities, the river itself is becoming the focus of water sports and other leisure activities.



A natural welcome to Scotland

Most of the Tay Cities Region lies within a one-hour drive from the City of Edinburgh and its airport, 'Scotland's gateway'. Easy road and rail access to Edinburgh and Glasgow make the Tay Cities Region a natural place to offer visitors a taste of Scotland beyond the big cities.



Icons that really stand out

The recently-opened V&A Dundee has attracted attention from around the world for outstanding design; both inside and out. Other attractions, such as Dundee Contemporary Arts, Glamis Castle, St Andrews ('The Home of Golf') and Glenturret Distillery (the oldest in Scotland) are all outstanding in their field. Together with other classic and emerging cultural icons, these attractions are bringing new profiles of visitor to the region as well as boosting its reputation as a great place to live and work.



Sunny days and happy visitors

Comprising highland, lowland, countryside and coast, the Tay Cities Region's relatively mild climate has helped to make it one of the most important agricultural producers in the UK, providing a wealth of opportunities to see food production in action and try high-quality food and drink close to its place of origin. Our mild climate also makes it easier for visitors to explore the great outdoors all-year round.



Focus on our Visitors

Tourism is growing globally and travellers have an increasing choice of where to go and what to do when they get there. By working together to give visitors more reasons to stay, explore and return, we can help to increase the value of the visitor economy, create jobs and support the region's long-term economic success.

Tourism businesses across the Tay Cities Region tell us that our visitors are:



Online everywhere

Online research, planning and booking continues to increase. More and more visitors are using mobile devices as their 'control pad' to plan their trips whilst on the road, search for inspiration on what to see and do, and make bookings.



Looking for authentic experiences

In a globalised world, visitors like to feel a genuine connection with the local people and culture of the places they visit. Whether it's through attending an event or purchasing a unique gift, visitors are paying closer attention to uniqueness and quality.



International

Improved connectivity has brought visitors from many more parts of the globe to explore Scotland. In line with the national pattern, the USA, Germany, Netherlands, France and the Nordic countries are the most important international markets to the Tay Cities Region.



Caring more about the impact of their visit

Concerns about the environment, social issues and the concentration of tourism in some locations are leading visitors to seek to reduce their use of resources, spend money with local businesses and seek out locations that are away from crowded hotspots.



Taking short breaks more often

Visitors are looking for opportunities to disconnect from their busy lives with short breaks that offer the opportunity to learn something new, spend time with family and concentrate on their physical and mental wellbeing.



Exploring on the open road

With mobile devices to hand, visitors are exploring with a flexible itinerary. Often inspired by social media (and sharing what they find), they're prepared to explore as they go, shunning fixed schedules and the traditional tourist circuit.

Shared Values

The priority themes and opportunities identified within this Tay Cities Region Tourism Strategy and the resulting actions that will flow from it will be based on the following shared values:



Collaboration

All tourism stakeholders should work together in pursuit of the mission of this strategy, coordinating with national and other regional bodies where relevant.



Quality of life

Actions taken to develop destinations and improve the visitor experience should always seek to ensure a positive contribution to the prosperity and wellbeing of local residents.



Leadership

Businesses should take the lead in finding ways to collaborate, improve the visitor experience and engage in decision making on destination development and marketing.



Professional development

The tourism sector should ensure that careers in the sector are rewarding, and offer continued opportunities for personal and professional development.



Sustainable growth

Initiatives to stimulate growth must be taken with a long-term view of delivering sustained economic and social impacts, while protecting the built and natural environment.



Fife - St Monans Windmill

Connecting the Destination

Our Regional Strengths

We are best placed to deliver a great visitor experience when we play to our competitive strengths as a destination. Together we can develop products and services which not only reflect the distinct nature of the region, but also exceed visitors' expectations and keep them coming back time and again to discover more.

The Tay Cities Region is enormously varied in terms of the experiences on offer (a competitive strength in itself), however there are three particular strengths, or 'connectors' that are common to the whole region:

Connector 1

Culture and the creative industries



Connector 2

Food and drink



Connector 3

Outdoor adventures



Other 'connectors' for destinations in the Tay Cities Region include major events, especially sporting events, golf, business events and cruise tourism.

Additional investment in tourism & culture: The Tay Cities Region Deal

In November 2018 the Scottish Government and UK Government together with Angus, Dundee City, Fife and Perth & Kinross Councils signed the Heads of Terms for the Tay Cities Region Deal, a funding package of more than £300 million, aimed at making the region one of the most productive, knowledge-led economies in Europe.

A total of £37 million has been designated to support a Regional Culture and Tourism Investment Programme that will invest in key economic assets that will expand the region's national and international visitor offer. The Programme is designed to maximise the use of public funds and leverage additional private sector investment.

Connector 1 CULTURE AND THE CREATIVE INDUSTRIES



A vibrant contemporary culture and a rich cultural heritage that is celebrated and brought to life throughout the year are not just great reasons to visit the Tay Cities Region; they are essential ingredients to a high quality of life here. Whether ancient or modern, visitors are looking to discover our culture in new, stimulating ways that can offer unique, transformative experiences.

Consumers today are also taking a renewed interest in the design, provenance and authenticity of the products they buy, as well as the opportunity to meet the people who are involved in their production. With iconic cultural attractions such as V&A Dundee, a history of creativity and innovation and an education sector specialised in the arts, The Tay Cities Region has the opportunity to excel at offering visitors a chance to immerse themselves in cultural and creative experiences that are hard to find elsewhere.



Angus - Glamis Castle



Dundee - V&A Dundee



Fife - East Neuk Glass



Perthshire - Perth Theatre

Our Strengths

- Over 6,000 years of heritage, showcased through a wide range of museums, cultural attractions and archaeological sites
- Dundee is a UNESCO City of Design, part of the Global Creative Cities Network and home to V&A Dundee, the only design museum in the UK outside London
- Wide range of small and microbusinesses in creative industries such as arts, crafts, textiles and ceramics offering visitors the opportunity to see and do across the region
- Diverse programme of cultural events and festivals and a strong network of performing arts organisations
- Higher education network specialised in the arts, as well as high-tech digital creative industries such as gaming and graphic design

Priorities for Action

1. Improve joint working between cultural and tourism establishments to ensure joined-up experiences for visitors, maximise reach for promotional activities and sharing of best practice in audience development and saleable products.
2. Establish the region’s reputation for creative tourism, building on established events, the profile of iconic cultural venues and the growing network of makers and creators across the region.
3. Encourage small and micro-enterprises in the creative and cultural sectors to engage with the tourism sector and visitors to further strengthen their businesses and demonstrate the rich cultural tradition in the region.
4. Utilise the high profile and international reach of the V&A Dundee to create a strong association of the museum with existing and new cultural attractions in the region.

Further suggested priorities are provided in Appendix 2.



Fife - Falkland Palace



Perthshire - Drummond Garden and Castle



Angus – House of Dun



Dundee - McManus Galleries



Angus - Hospitalfield



Dundee – Dundee Contemporary Arts



Fife - Max McCance Furniture Maker



Perthshire – Pitlochry Festival Theatre



V&A Dundee currently sets out five pillars for its audience development

1. **Building the core audience from scratch, connecting with target audiences and convincing them to visit**
2. **Encouraging repeat visits and increasing involvement**
3. **Creating exhibitions and events that appeal to target audiences**
4. **Positioning V&A Dundee as a must-see and must-do destination for tourists**
5. **Building out from the core audience to attract audiences who are specialist, niche or less traditionally predisposed to visiting museums.**



V&A Dundee

V&A Dundee is an international centre for design and the first design museum in the UK to be built outside of London and the largest cultural project of its kind to be developed in Scotland for many years. Standing on Dundee's waterfront (currently undergoing a 30-year, £1 billion development), the museum showcases the brilliance of Scottish creativity and the best of design from around the world. The year one visitor number estimate of 500,000 was exceeded within six months of opening. It is anticipated that the annual visitors numbers will settle at around 360,000 each year making it one of the most highly visited attractions in Scotland.

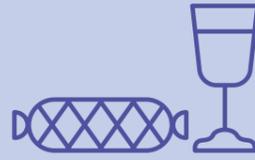
The museum currently has the largest temporary exhibition space of any museum in Scotland, giving local people and visitors a good reason to return again and again. In addition, it aims to be a "living room for the city" and an education venue, offering dynamic learning spaces, a design residency studio, events spaces as well as a large café and restaurant.

Since opening in September 2018, V&A Dundee has made a promising start as a catalyst for economic development in City of Dundee and the surrounding area. Combined with attractions such as Dundee Contemporary Arts, the McManus Galleries and Museum, Dundee Rep and Studio Dundee (currently under development), V&A Dundee has underpinned Dundee's status as a UNESCO Design City, the first in the UK to receive this title.



Connector 2

FOOD AND DRINK



Food and drink – its origin, preparation, presentation and enjoyment - are occupying an increasingly important place in travellers' itineraries. Today it also plays a major role in the 'experience economy' where special, unique food experiences are attracting a premium. Food and drink offer visitors a unique way to connect across the whole region by linking its people, culture, customs and landscapes.

By building on the region's status as a major agricultural producer, ensuring that local agricultural production is well connected with the hospitality industry, and increasing the opportunities for visitors to learn more about the food production process through visitor attractions, we have a major opportunity to grow the visitor economy in a way that creates a lasting economic impact across the region.

Our Strengths

- The Tay Cities Region is one of the largest agricultural-producing regions of the UK, offering visitors an unparalleled opportunity to understand the region's food story from field to fork.
- The number of food-related events and attractions in the region is steadily growing, providing more touch points for visitors and creating more reasons to stay longer.
- The region is home to leading research centres in food production and technology.
- We are host to a wide range of higher-education establishments specialised in food technology and hospitality, providing an important skills base for the hospitality industry.

Priorities for Action

1. Working with the tourism and food & drink sectors, develop a regional Food Tourism Action Plan in line with the national Food Tourism Action Plan, including local provenance, seasonality and sustainability.
2. Raise the region's profile with visitors as one of the most important agricultural areas in the UK, focussing on the range of food & drink related tourism experiences available throughout the region.
3. Provide greater opportunities for food and drink enterprises to engage with the tourism sector and visitors to further strengthen their businesses and demonstrate the rich food and drink tradition in the region.

Further suggested priorities are provided in Appendix 2.



Perthshire – Loch Leven Larder



Fife - Farm shops



Dundee – Dundee Cake



Angus – Arbroath Smokies



Fife - St Andrews Farmhouse Cheese



Angus – Glenesk Hotel 360' Bar



Dundee - 71 Brewery Tour



Perthshire – Highland Chocolatier

Scotland's Primary Food & Drink Region:

The region's contribution to the food and drink sector is second to none in Scotland. The region grows 82% of Scotland's fruit crop, 60% of the vegetable production, 37% of the wheat and 25% of the barley and oilseeds crops. Our local fisheries have a strong international market and the region is the base for major players such as Kettle Produce, Quaker, Marine Harvest and Highland Spring.

It is no wonder that the region's reputation as a food tourism destination is growing, with more and more opportunities for visitors to taste, experience and learn about the region's rich larder. These experiences may take place at world-class restaurants such as The Peat Inn, Andrew Fairlie @ Gleneagles or The Newport, or by sampling award-winning handmade chocolates, scones or fish and chips at a local café.

There are opportunities to build on the food tourism groups and initiatives already in place in the region, such as Food from Fife, Taste of Angus, Dundee Flower & Food Festival and the newly emerging food tourism group in Perth and Kinross.

From the oldest, smallest and most well-known whisky distilleries, such as Glenturret, Edradour and Dewars, to new spirit distilleries, such as Arbikie, Gin Bothy and Lindores Abbey Distillery, offering bespoke, high quality tours and craft beers, such as Inveralmond Brewery and St Andrews Brewing Company reaching into pubs and bars across the region. From hands-on cook school experiences such as Ballintaggart Farm in Perthshire to foraging weekends learning about our natural larder, the region has something for everyone.

Connector 3 OUTDOOR ADVENTURES



In an era of digital-overload and busy lives, adventures in the great outdoors offer residents and visitors an opportunity to 'get away from it all', spend time with friends and family, and enhance their physical and mental wellbeing. With growing participation in walking, cycling and running, there is a growing desire to do similar activities whilst on holiday, combining adventures in the outdoors with stays in cosy, comfortable locations as well as visits to cultural attractions.

With its blend of highland and lowland landscapes, lochs, rivers and coastline, together with a growing number of long-established, award-winning activity providers and facilities, the Tay Cities Region is well placed to offer visitors a wide variety of outdoor adventures without having to travel great distances. There is also significant potential for developing water-borne tours and activities along the River Tay itself.



Dundee - Verdant Spirits



Fife - Tayport Distillery



Angus - Ogilvy Visitor Centre



Perthshire - Glenturret Distillery



Angus - Boat tours around Arbroath



Dundee - Tay Estuary, Dundee



Angus - Glen Clova



Fife - Bunnet Stane, Lomond Hills



Perthshire - Night kayaking on the Tay

Our Strengths

- Wide variety of landscapes including highland, low-land and coastal scenery
- A variety of established walking/cycling routes within easy reach of urban centres and visitor attractions
- The River Tay creates a clear natural link between the Tay Cities and wider region
- Growing number of professional activity providers, guides and facilities, providing expert, entertaining and safe activities for all
- Our relatively mild climate provides optimal conditions for a wider range of visitors to engage in outdoor activities

Priorities for Action

1. Improve understanding of the adventure market in the region, in order to identify the opportunity to further support the development of outdoor activities in the region. This would include consideration of the current provision, different market segments (such as families, individuals, ageing markets, groups) and emerging trends (such as wellness).
2. Encourage greater networking between outdoor activity providers and activities across the region to ensure joined-up experiences for visitors, maximise reach for promotional activities and sharing of best practice, such as online booking platforms, digital marketing and innovative business models which enable more sustainable growth across the sector.
3. Ensure that the broad range of outdoor experiences on offer across the region (both free and paid) is capitalised on in order to position the region as Scotland's most accessible outdoor destination.

Further suggested priorities are provided in Appendix 2.

Scotland's Playground:

Connected by the River Tay, Scotland's longest river, the Tay Cities Region offers outdoor experiences from mountain climbing, bungee jumping, cycling and canoeing to wildlife-watching and meditation retreats.

To the north is Highland Perthshire and the Angus Glens offering hill-walking and mountain biking in spectacular scenery on the edge of Cairngorms National Park. To the west, iconic mountains such as Ben Lawers and Schiehallion provide the backdrop for famous lochs, rivers and natural attractions such as Loch Tay and the Pass of Killiecrankie, all steeped in history and stories and popular with walkers, watersports enthusiasts and munro-baggers. The wild Rannoch Moor provides access to some of Scotland's wild lands. To the east is the coast, with the beautiful golden beaches and rocky foreshores of Angus and Fife, amongst which nestle charming villages connected by coastal paths. And the River Tay links all four regions, creating the perfect conditions for internationally acclaimed golf

courses such as The Old Course in St Andrews and Carnoustie, sailing and watersports and an ideal habitat for seabirds, dolphins and seals.

The region's long distance footpaths - The Fife Pilgrim Way, Fife Coastal Path, Rob Roy Way and Cateran Trail - enable visitors to reach deeper into the region, and there are a growing number of companies providing guided activities and walks throughout the region. The growing interest in health and well-being is also resulting in more operators providing health and yoga holidays, spa days and for the more active running or cycling holidays.

All of these activities are supported by a programme of both one-off and well-established sporting events, with a particular strength being golf. The region regularly plays host to The Open at both Carnoustie and St Andrews, with The Solheim Cup being held at Gleneagles in 2019 and the 150th Open being held in St Andrews in 2021.



Dundee – Pirate Boats



Fife - Isle of May



Perthshire – Enchanted Forest



Angus – Montrose Basin Visitor Centre



Dundee – Foxlake Adventures



Fife - The Old Course, St Andrews



Perthshire – Scottish Crannog Centre

Strengthening the Tourism Sector across the Tay Cities Region

In order to grow the value and sustainability of the visitor economy across the Tay Cities Region, it is important to ensure that destinations can reach their full potential through 'destination development and joint destination planning'. This means building our capability to give visitors the experiences they are looking for, encouraging industry leadership and collaboration, and delivering great experiences for our visitors based on the destination 'connectors' in this strategy.

By taking a region-wide approach to destination development we aim to make the best use of resources and ensure that our actions have the greatest impact.

Building our Capabilities

1 Employment and skills

Almost 30,000 people are employed in the tourism industry across the region. It is a key economic sector, both in terms of GVA and jobs. Ensuring that our businesses thrive and that visitors enjoy a high-quality experience means having staff who are skilled, empowered and motivated to deliver that experience. This means starting early to highlight the attractiveness of careers in tourism to young people in education, ensuring those working in the sector can travel safely and easily to work and live locally (a particular issue in rural areas) and that the sector is delivering fair, inclusive and rewarding jobs for the long-term. Continued work is needed to support business leaders to operate their businesses efficiently, and to ensure that staff at all levels have the skills (especially digital) to ensure that they meet the needs of connected consumers, wherever they visit in the Tay Cities Region.

2 Business leadership

Ultimately, much of the visitor experience relies upon the vision and drive of the people they meet during their journey. This is why it is important to support and develop leaders in businesses of all sizes to build skills among their workforce, operate their business efficiently and collaborate with the wider tourism industry.

Micro-businesses, small and medium-sized enterprises make up the majority of the business base in Scotland, and the Tay Cities Region in particular. Focussing on serving customers and the day-to-day essentials often leaves few resources for business development, training and participation in business networks. Therefore, responses to the wider aims of the strategy should be built with this in mind.



3 Business innovation and intelligence

In order to create innovative products and experiences it is essential to keep up with emerging consumer and industry data and trends, understand how our visitors perceive and consume our products and make the most of opportunities to share knowledge on how we improve experiences in the region. Innovation is more likely to be prioritised in well led businesses and having access to insights helps businesses make intelligent decisions in order to grow.

4 Effective communication

It takes time, skills and effort to stand out in a competitive environment, therefore it is important to support local destinations and tourism suppliers in reaching their consumer and trade marketing goals. We can do this by helping industry stakeholders to develop a clear and coherent message about the Tay Cities Region and encouraging a team approach to communicating it with consumers and the travel trade.

Priorities for Action

1. Work with tourism stakeholders region-wide to identify the skills gaps and employment opportunities (supporting ongoing work on a regional skills plan and Tourism Skills Investment Plan).
2. Facilitate greater engagement between tourism sector and education sector (schools, further and higher) to highlight career opportunities (and help change perceptions of the industry) and provide a strong pipeline of young people entering the sector (through national skills programmes where appropriate).
3. Support business leaders to play an active role in decision-making around tourism in the region, in particular the delivery of local and regional tourism strategies.
4. Create opportunities for innovative thinking within the sector, harnessing academic strengths where appropriate. Areas of consideration may include insights into customer behaviour, use of new technologies, effective use of data and insights.
5. Support businesses and local destinations to work more effectively together, providing opportunities to joint market, engage with travel trade and media and access funding.

Further suggested priorities are provided in Appendix 2.

Improving the Customer Journey

1 Connectivity & Visitor Infrastructure

If visitors are to spend longer in the Tay Cities Region and enjoy the full range of what it has to offer, they will need to be able to travel around the region with confidence, easily reach the attractions they wish to visit, and plan and book their visits online quickly and efficiently. To lessen the environmental impact of tourism, we must make it easier for visitors to choose environmentally friendly options, such as public transport and shared transport methods such as e-bikes and e-vehicles.



2 Visitor Services & Facilities

In addition to our outstanding scenery, it is our visitor infrastructure such as accommodation, attractions, restaurants and transport facilities that encourages visitors to visit and return therefore we must ensure that visitors find attractive, high-quality facilities, and that these are developed with the long-term needs of visitors and the local community in mind.

Priorities for Action

1. Work with partners to take advantage of the region's SMART Transport Hub investment to pilot innovative transport solutions including CAVs (Connected Autonomous Vehicles).
2. Investigate collaborative solutions to ensure seamless visitor experience across the region and the 'final mile' from public transport to the front door.
3. Maximise government investment into World Class digital infrastructure across the region, ensuring businesses have skills and capabilities to use it.
4. Clearly articulate gaps in regional tourism infrastructure and collaborate with national agencies to encourage appropriate investment (such as hotels, attractions etc).
5. Support businesses across the region to benefit from Tay Cities Deal infrastructure investment to help futureproof services and products.

Further suggested priorities are provided in Appendix 2.

Supporting Leadership and Collaboration

1 Leadership

It is time to take a fresh approach to tourism development in the Tay Cities Region; one that is led by industry needs and enables tourism enterprises of all kinds to create and sustain jobs. Opportunities will be developed for those working in the industry to strengthen their leadership skills, both within their own enterprises and at an area level by strengthening tourism groups. The result will be a drive to deliver greater consistency in the quality and value of visitor experiences.

Priorities for Action

1. Using the enterprise and skills networks, showcase industry leadership opportunities for tourism businesses, including mentoring, peer-to-peer learning, courses and training.
2. Working with industry groups, establish a programme of (existing and/or new) industry networking opportunities which bring tourism enterprises together in an environment where new ideas and partnerships can be created.

2 Collaboration

In order to address barriers to growth, influence investment, spark innovation in service and product delivery, we must strengthen businesses so that we can collaborate more effectively.

3. Ensure a mechanism is in place for industry to oversee and steer the delivery and direction of the Tay Cities Region Tourism Strategy, with annual reporting.

Further suggested priorities are provided in Appendix 2.



Leadership, Governance and Delivery

The next stage of the strategy's implementation is to assess and prioritise the proposed actions in conjunction with the industry and public sector partners. These will be assessed against the strategy's key objectives as well as the financial and human resources required to effectively deliver them.

In order to successfully deliver and drive forwards a strategy of this scale and ambition, consideration on the appropriate structure and mechanism is required. This structure will provide direction, oversight, and monitoring of the implementation of the strategy and related action plan. Furthermore, this structure should include industry representation as well as agency and stakeholder participation.

It is acknowledged that governance arrangements are being put in place with regards to the Tay Cities Deal and that this includes a structure to oversee the regional Culture and Tourism Investment Programme.

Accordingly, there is both a need and opportunity to develop clear structures and connections which address, in an integrated approach, the regional Tourism Strategy, the Investment Programme and the wider collaborative regional economic development activity.

The initial governance structure is outlined in the Appendix 3 and will be finalised in line with the action plan.



Appendix 1 Examples of Key Performance Indicators

In order to track progress of the strategy's delivery, a monitoring framework will be established. The framework will be developed in line with the action plan. Below are the main key performance indicators (KPIs) available. Additional sources may need to be used or developed depending on the actions.

Headline Indicators

Indicator	Source	Frequency
UK Visits (000s)	Great Britain Tourism Survey (GBTS)	Annual
UK Visitor Expenditure	Great Britain Tourism Survey (GBTS)	Annual
Int'l Visits (000s)	International Passenger Survey (IPS)	Annual
Int'l Visitor Expenditure	International Passenger Survey (IPS)	Annual
Tourism GVA	Growth Sector Statistics Database; Scottish Annual Business Statistics	Annual
Productivity Tourism GVA Per Employee	Growth Sector Statistics Database; Scottish Annual Business Statistics	Annual
Tourism Related Employment FTEs	Growth Sector Statistics Database; Scottish Annual Business Statistics	Annual

Supporting Indicators

Indicator	Source	Frequency
Accommodation Occupancy	Scottish Accommodation Occupancy Survey (SAOS)	
~ Hotels		Monthly
~ GH/B&B		Monthly
~Self-Catering		Monthly
~Camping/Caravan		Monthly
UK Visits: Avg Length of Stay	Great Britain Tourism Survey (GBTS)	Annual
UK Visits: Avg Spend per Day	Great Britain Tourism Survey (GBTS)	Annual
Int'l Visits: Avg Length of Stay	International Passenger Survey (IPS)	Annual
Int'l Visits: Avg Spend Per Day	International Passenger Survey (IPS)	Annual
Seasonality: visits by quarter	GBTS/IPS	Annual
Visitor Sentiment overall visitor satisfaction rating	Scotland Visitor Survey	3-4 years

Factors to be taken into consideration when developing the framework include:

- Frequency of collection
- Recency of data
- Consistency of data
- Regional accuracy of data
(e.g. only part of Fife is included in the region)

Appendix 2

Looking ahead: Opportunities & Priorities for Action

From the work undertaken in developing the strategic framework, a number of actions and opportunities were captured. Keen not to lose the breadth of the discussion and ambition demonstrated during the strategy process, the actions which were gathered are shown below.

The next stage of the strategy's implementation is to develop the action plan. This process will take the Priorities for Action referenced in the main strategy above. These will be assessed against the strategy's key objectives as well as the financial and human resources required to effectively deliver them.

The opportunities and further actions shown below will be considered within this discussion.

Delivering a Great Visitor Experience

Connector 1

Culture and the creative industries

Suggested Actions

- Create synergies between our local culture and the creative industries, and other elements of the visitor journey, such as food and drink, accommodation, or business events
- Create products (such as passes and joint ticketing) and itineraries that encourage visitors to explore our cultural heritage assets more widely and easily
- Examine the potential for further assets in the region that would enhance the visitor offer in the field of culture and the creative industries while strengthening the asset base for this sector
- Attract visitors based on our strengths in high-tech creative industries
- Use iconic events related to our culture and creative industries to address challenges such as seasonality
- Support rural economic development by developing creative tourism in small and microenterprises

V&A Dundee

Suggested Actions

- Proactively structure a regional tourism offer (such as associated attractions and events) around V&A Dundee’s audience objectives outlined above, in order to encourage V&A visitors to explore the wider Tay Cities Region. This offer should be linked with the museum visitors’ needs and expectations
- Connect the tourism sector of the wider Tay Cities Region with developments taking place at V&A Dundee, and share knowledge on how businesses can capitalise on linkages with the museum
- Track insights on visitor profile and behaviour and use these to adapt product development and marketing actions in Dundee and the wider Tay Cities Region
- Create a strong association in the minds of current and potential visitors between V&A Dundee and other attractions in the region through themes such as design, architecture, food and drink, wellbeing, and learning something new
- Develop an events agenda that compliments the profile and cultural programme on offer at V&A Dundee

Food and drink

Suggested Actions

- Enhance connections between growers, producers, retailers, food service providers and visitors in order to support local jobs and keep visitor spending within the region
- Strengthen links between the region’s food and drink produce and other major sectors such as the creative industries, business events and the cruise industry
- Evaluate, in line with the Food Tourism Scotland Strategy, the potential for increased tourism assets in the region that capitalise on the strong reputation for food and drink production and improve the offer for visitors

- Improve insights and business intelligence on food and drink tourism to support business development
- Develop events and attractions that help to drive tourism during low-season and encourage visitor dispersal throughout the region
- Create stronger, wider connections across the region between hospitality providers and the education sector (schools, colleges and universities) to promote careers, skills and opportunities in the local food and drink sectors
- Use linkages between food producers and the tourism sector to ensure a more sustainable future for the rural and coastal economy, and the environment

Outdoor adventures

Suggested Actions

- Capitalise on consumers’ interest in health and wellbeing to encourage visitors to include outdoor adventures as part of their stay
- Develop synergies with neighbouring cities and regions (Edinburgh, the Cairngorms National Park, Loch Lomond National Park and the Trossachs National Park) to increase the flow of visitors coming to the Tay Cities Region for outdoor adventure activities
- Develop relationships between suppliers offering outdoor adventure experiences and the wider travel industry in the region
- Improve facilities for outdoor activities to improve health and wellbeing of local residents
- Develop events that capitalise on the region’s natural assets and encourage touring and longer stays

Building our Capabilities

Employment and skills

Suggested Actions

- Develop a skilled workforce that can contribute to a growing visitor economy, by anticipating future trends and patterns of demand in the tourism sector and building the skills of our workforce around these
- Work with tourism stakeholders region-wide in order to identify and map skills gaps and employment opportunities (supporting ongoing work on a regional skills plan)
- Conduct regional-level planning with the education sector to fill skills gaps in line with national skills programmes
- Work with the education sector in order to highlight the opportunities offered by careers in the tourism sector and connect young people with workplace training programmes

Business leadership

Suggested Actions

- Work to inspire business leaders in skills development in line with the objectives of this strategy
- Carry out region-wide industry engagement and training programmes (working in alignment with national programmes by VisitScotland and Scottish Enterprise) that inspire business leaders and build their capacity to innovate
- Empower business leaders to play an active role in decision-making on the implementation of this strategy

Business innovation and intelligence

Suggested Actions

- Develop region-wide initiatives to collect and disseminate knowledge on customer behaviour and market trends
- Develop region-wide culture of innovation in tourism businesses, helping businesses to understand how to enhance their products and services in order to compete more effectively
- Harness the region’s academic and digital strengths to develop innovative approaches to using data, to deliver insights that can underpin business decisions
- Encourage B2B knowledge sharing and collaboration using tools such as online networking, news updates, peer support and mentoring programmes, and sector-based meet-ups for tourism stakeholders from across the Tay Cities Region

Effective communication

Suggested Actions

- Support businesses and local destinations in engaging with the travel-trade, using resources (e.g. knowledge, content) from across the region in order to support local destination marketing efforts
- Establish networks to provide region-wide marketing support for tourism businesses in consumer marketing, in particular digital marketing skills
- Develop and nurture common set of content resources to support businesses in communicating effectively about the Tay Cities Region

Improving the Customer Journey

Connectivity & visitor infrastructure

Suggested Actions

- Identify connectivity gaps in partnership with local stakeholders and map current and potential future tourism demand around attractions and events
- Address challenges to the ‘final mile’ of visitor journeys by maximising new approaches to transportation across the region, such as SMART City & SMART Transport initiatives (e.g. e-bikes, e-vehicles)
- Facilitate public transport planning between local authorities, attractions, event organisers and transport operators
- Work with public transport operators to promote connectivity between the Tay Cities Region and the major gateways of Edinburgh, Glasgow and their respective airports, and to position the region better in the minds of potential visitors
- Work with public bodies to ensure that the region’s road network is optimised, with good signage and other facilities for visitors
- Develop tools to encourage easy route and itinerary planning among visitors

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Visitor services & facilities

Suggested Actions

- Coordinate our work at regional level to plan and improve visitor facilities based on current and future visitor demand
- Develop visitor attractions that strongly enhance our offer around the connector themes identified in this strategy
- Work to increase the quality and variety of visitor accommodation, in particular around the connector themes identified in this strategy
- Coordinate regional leisure and business events where possible in order to capitalise on accommodation capacity
- Facilitate business networks that help accommodation suppliers, attractions and food and drink providers to learn and enhance their product range

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Supporting Leadership and Collaboration

Leadership

Suggested Actions

- Ensure that the action plan from this strategy is developed through a process of co-creation and that is delivered through long-term, widespread cooperation between the tourism industry and public agencies
- Establish and nurture a formal structure for regional tourism development and cooperation to take on this strategy and oversee its implementation. The starting point for this structure shall be the existing network of Area Tourism Partnerships
- Encourage tourism industry leadership across the Tay Cities Region by implementing national leadership programmes across the region

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Collaboration

Suggested Actions

- Establish and nurture a go-to channel for regional B2B news, networking and partnership building
- Support the development of experiential tourism products on a region-wide basis
- Establish a clear and coherent structure for industry engagement at regional level
- Implement actions resulting from this strategy through action-oriented short-life working groups involving relevant stakeholders

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Leadership, governance & delivery

Suggested Actions

- Establish an appropriate structure for destination planning and management of tourism for the Tay Cities Region, in line with the recommendations and actions set out in this strategy
- Ensure that destination planning and management decisions are taken and implemented on a region-wide basis, where there is clear rationale to do so

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Appendix 3

Tay Cities Region Tourism Strategy Governance Structure

In order to ensure effective leadership and oversight of the strategy it is necessary to consider an appropriate structure that includes private sector and public sector stakeholder interests. This needs to be cognisant of broader relationships in respect of the collaborative approach to economic development at the regional level, in particular the Tay Cities Regional Economic Strategy and the Tay Cities Deal (see Figure 2 below), whilst being sensitive to the existing local area structures for the tourism sector. Moreover, it is important to ensure as streamlined an approach as possible given the resources required to service the structure as well as the necessary commitment from the private sector and partner agencies’ officers alike.

The following governance structure is proposed (illustrated in Figure 3 below). It will be kept under review to ensure alignment with the evolving Tay Cities Deal governance structure (in particular the Culture and Tourism Advisory Board which is still to be established) and to minimise duplication with other regional groups and activities.

Regional Tourism Leadership Group (RTLG)

The responsibilities of this group will be to:

- **Oversee the implementation of the Tay Cities Region Tourism Strategy**
- **Influence and support the prioritisation of activities associated with the strategy delivery, including the allocation of resources**
- **Monitor strategy progress**
- **Provide progress updates to relevant bodies, such as Tay Cities Region Joint Committee**
- **Encourage and support regional collaboration**

Group composition

The group will be made up of senior industry stakeholders from across the region who are able to provide strategic expertise and direction on the themes included in the strategy. This will include representatives from the following organisations:

Angus Tourism Cooperative (or equivalent)	Angus Council
Fife Tourism Partnership (or equivalent)	Dundee City Council
Dundee Tourism Action Group (or equivalent)	Fife Council
Perthshire Tourism Partnership (or equivalent)	Perth & Kinross Council
Tay Cities Enterprise Forum	Scottish Enterprise
	VisitScotland

The RTLG will meet 4 times per year and be chaired by an industry representative. If required, short-term working groups may be formed.

This structure seeks to encourage broad regional business engagement coupled with strategic input and direction from leaders across the sector. It builds on existing collaborative networks, whilst bringing industry and public sector together around clear actions.

The RTLG has overall responsibility for the strategy, ensuring delivery with a focus on efforts to increase industry collaboration and develop the broader tourism economy, contributing positively to the region and Scotland’s tourism ambitions.

With a clear governance structure in place, the cross-agency team supporting the industry to deliver should be agile and able to respond quickly to a broad range of regional and national opportunities. A coordinated approach to delivery allows economies of scale to be achieved – particularly around pan-area connector themes – e.g. outdoors

Working collaboratively across the region with a strong leadership group will allow the strategic investments being

made through the Tay Cities Deal (TCD) to be maximised over the lifetime of the Deal. Alignment with the TCD governance structure, in particular the TCD Enterprise Forum and Management Team will be important (see Figure 3 below). Value could be added, for example, around complementary product or experience development on the back of some of the planned major infrastructure investment.

Consideration of the commitment of industry and public sector representatives at the appropriate level is required as the RTLG will need to assume its leadership responsibility quickly. In addition, national agencies may be required to commit resources to this regional structure as well as local authority partners and the lack of one lead or coordinating body may make project delivery and management challenging.

The strategy’s alignment with other related strategies and the proposed governance structure in relation to the Tay Cities Deal management structure are illustrated in figures 2 and 3 below.

Figure 2
Tay Cities Region Tourism Strategy 2019 – 2024
Alignment with other strategies

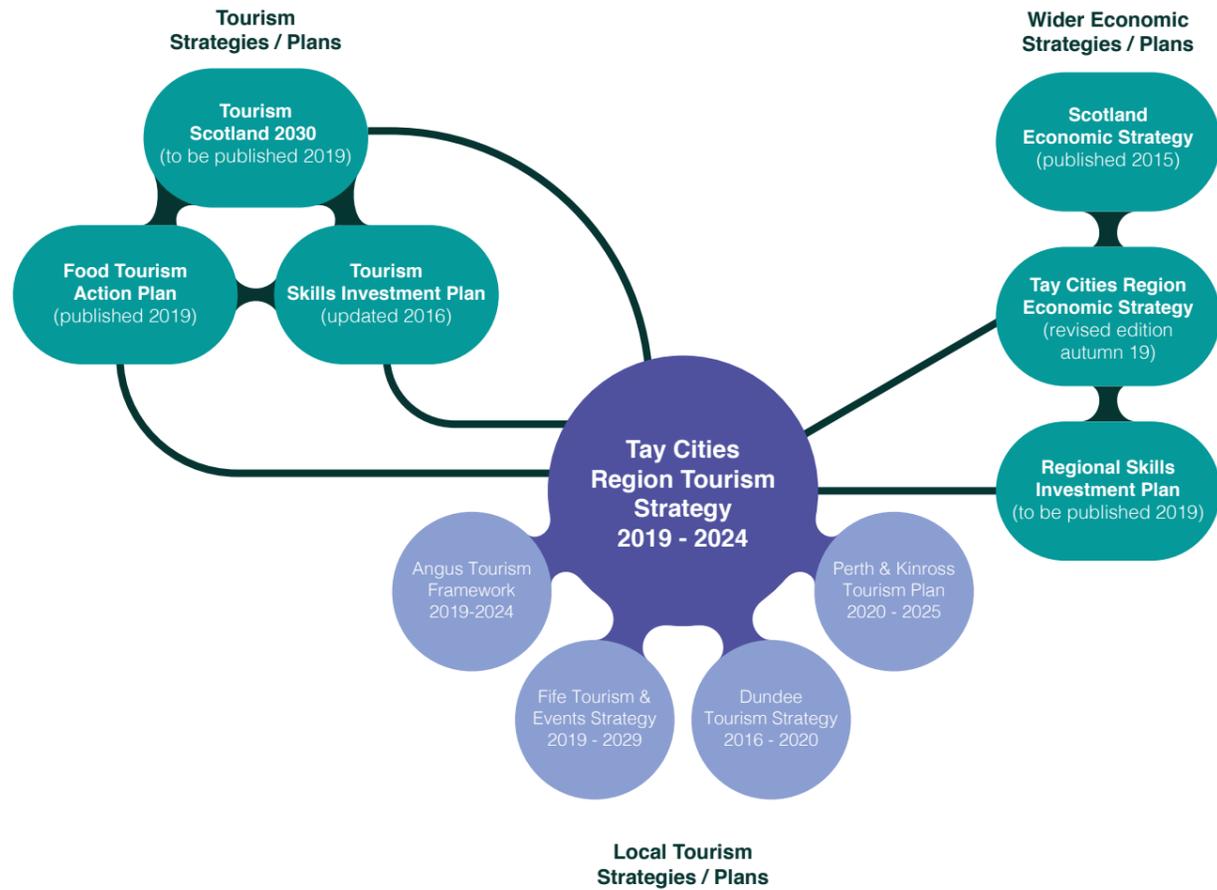
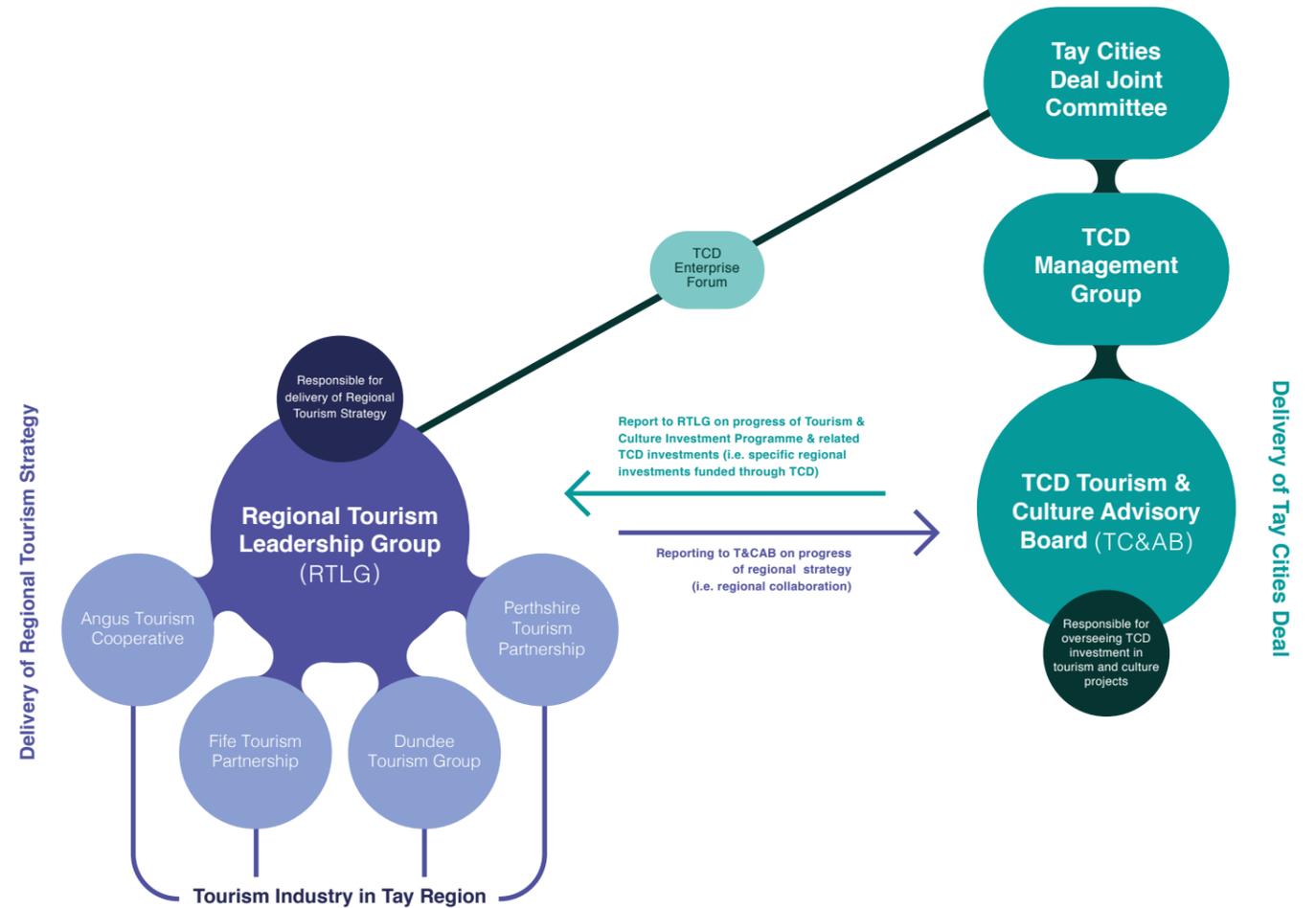


Figure 3
Regional Tourism Leadership
Group structure



SUPPORTED BY

Angus Council

Dundee City Council

Fife Council

Perth and Kinross Council

Scottish Enterprise

VisitScotland

DEVELOPED
IN COLLABORATION WITH

TOPOSOPHY
PLACE MAKING & MARKETING AGENCY

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