

MID TERM REVIEW OF DUNDEE TOURISM STRATEGY

2016-2020

1 2018 STRATEGIC CONTEXT AND ACHIEVEMENTS TO DATE

This strategy's original vision was to make Dundee one of the best small cities in the UK for cultural short breaks and this continues to be relevant and current for the remainder of the strategy's life. The most recent statistics from 2017 show evidence of increasing progress in extending overnight stays, highlighting good progress is already being made towards achieving this shared vision.

V&A Dundee will open its first museum outside of London in Dundee on the 15th of September. It is the cultural showpiece of the city's 30 year, award winning, £1 billion Dundee Waterfront. Dundee's status as the first UNESCO City of Design in the UK recognises our cultural and creative credentials. Recent accolades, such as the Top Ten European Destination by the Lonely Planet for 2018, fit well with our journey to becoming a cultural break destination of choice.

Overall, our 2017 figures show a significant increase in value and volume and an economic impact value of £172m (+8%) which shows we are on target to reach the figures identified in the Dundee Tourism Strategy 2016 – 2020 – increasing value to £185m by 2020.

Tourism and all that draws visitors to the city, makes a significant contribution to Dundee. It supports the city's profile and reputation, stimulates new investment, and it helps to attract and retain talented people. The visitor economy impacts on the entire city region, bringing new business opportunities and jobs for local people. The recently launched Scotland's Tay Country destination brand and its associated campaigns and collateral adds value to our individual destination brands and activity.

Dundee is now on the radar with the travel and tourism media worldwide, it is recognised as a new destination and this provides an additional opportunity at a local regional and national level. Visit-Scotland now considers Dundee and the Tay Cities Region as a key tourism priority area.

The vitality, passion and enthusiasm within the sector to engage and drive the strategy forward continues and tools to facilitate this, such as a new Strategy Group and DTAG website have been built and are in development. The VS Dundee Facebook page has 185 members and the Dundee Food & Drink Facebook page has 90 members, both with 90% active members group sharing information and assisting each other. The Dundee Tourism Action Group (DTAG) meets quarterly and shares information regularly by email and the B2B website will offer a one stop resource for information, toolkits, imagery and insights.

A mid-term review session was held in May with over 50 businesses represented to share the achievements to date. As a result a strategy group was formed representing a cross sector of the tourism offer which met in June to prioritise the key actions going forward.

The identified target markets remain the same with a priority focus on: Food Loving Culturalists and Curious Travellers within the UK and Europe as well as Business Tourism; Cruise Tourism; Golf; Travel Trade and Staying with Friends & Relatives.

Some notable achievements from our work packages have already been mentioned and there are many more, and a brief overview of some of these are highlighted under each work packages for the purposes of this review. Significant progress and activity has taken place under each of the work packages and all the partners are to be congratulated on these achievements so far. The fact that we can see this affecting the number and value of visitors to the city is testament to the impact the actions within the strategy are having.

GOING FORWARD - PHASE 2 DUNDEE TOURISM STRATEGY 2018 - 2020

However, gaps and challenges remain and it is these that we need to focus on in the next phase of the strategy's delivery.

The recent meeting of Strategy Group identified the *following areas* should be prioritised at a strategic level for the next phase and some initial ideas are listed in the action plan:

- The welcome
- Information resources for visitors
- Information resource for businesses
- Actions to encourage longer stays
- Maintaining and continuing to build on the positive image and perception of the city
- Development of visitor packages
- Increasing the quality and variety of food and drink options
- Development of regional activity where appropriate

The DTAG quarterly meetings provide a forum for industry and other partners to report on progress, make any adaptations required and identify key individuals or groups to lead and drive some of the actions forward.

We are in a phase of great change for tourism locally and undoubtedly new opportunities and challenges will arise which we may not be able to anticipate or imagine at this stage, therefore, we are keen to remain flexible and adaptable in relation to the key actions.

The attached action plan is a working document which will be updated and adapted as we navigate the next 30 months.

Delivery Model

The current Dundee Tourism Action Group is well attended and inclusive. Anyone working in the sector is free to attend the meeting and also access the soon to be launched website and other assets such as the Facebook page. The group is a useful and effective forum for exchanging information and identifying any trends and issues as the sector in the city grows. However, it is recognised it is too large and unwieldy to be useful when identifying and delivering specific actions to drive the strategy forward. As a result, a smaller more industry focussed and dedicated group is required to achieve this.

A group of industry partners came forward and met in June to lead on the delivery of the strategy and also to act as a link to the other groups within the city who will be able to drive the strategy forward. The partners involved in the resulting DTAG Strategy Group include:

Forbes of Kingennie, also representing Dundee & Angus Visitor Accommodation Association

Leisure & Culture, also representing the Cultural Agencies Network

Dundee Social Enterprise Network

DCA and representing Visit Dundee

Majr Properties, also representing DD One

V&A Dundee

Broughty Ferry Traders

Dark Dundee

Dundee Industrial Heritage

Creative Dundee

UNESCO city of Design

Hotel Indigo

Tayberry

University of Dundee, also representing UNESCO City of Design

Dundee City Council

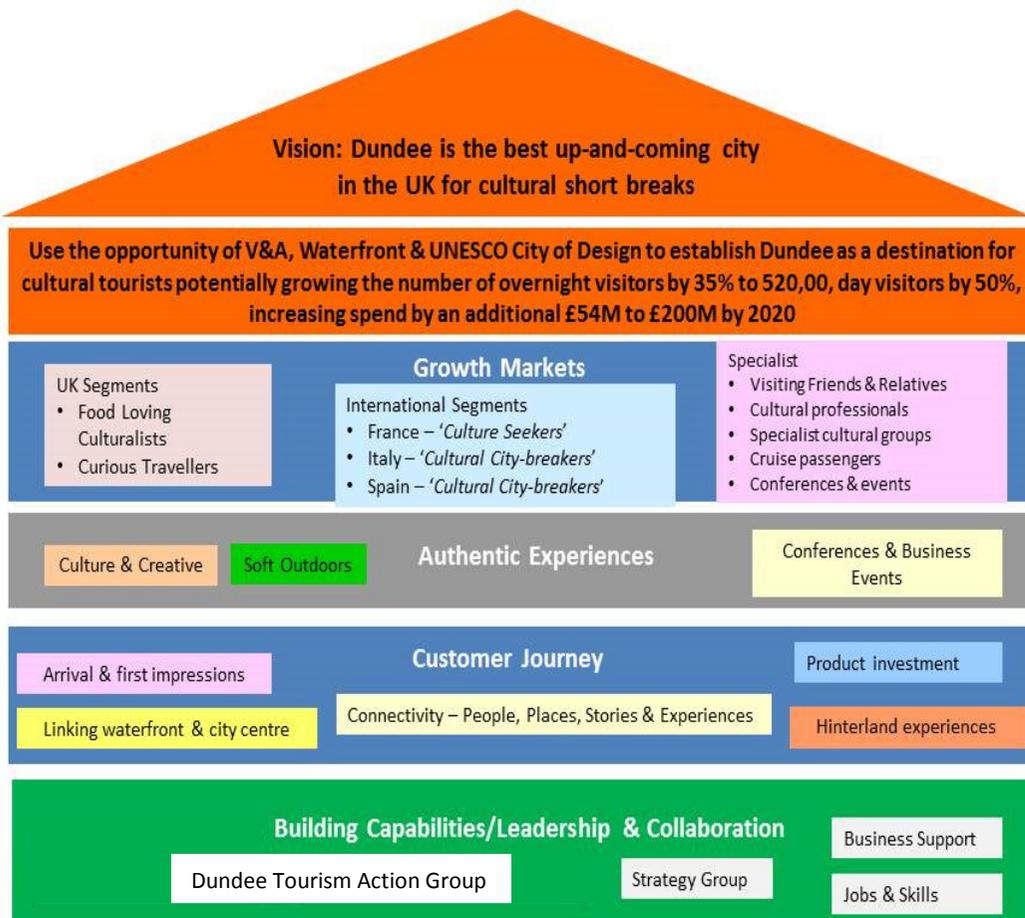
Scottish Enterprise

VisitScotland

The strategy identifies our best prospect target markets, what we have to offer them and where the gaps are. It identifies where investment is needed to give our visitors more reasons to stay longer, and the programmes we need to pursue together to deliver the strategy. Some actions within the plan fall to the private sector to deliver, others to the public sector – and some to imaginative and creative partnerships and collaborations of different agencies and businesses.

Monitoring Progress

Each year we undertake a Hotel Demand Study with CBRE which also provides occupancy data; whilst Scottish Tourism Economic Monitor (STEAM) which provides value & volume and we will explore a Sentiment Analysis. These help us to monitor progress towards achieving our proposed outcomes.



The ‘rocket’ on the left mirrors that of the national tourism strategy, Tourism Scotland 2020 and shows the priorities and opportunities that will

Year	Total Visitor numbers	Total Visitor value	Total Staying Visitor numbers	Total Staying Visitor value	Total Day Visitor numbers	Total Day Visitor value
2020 Midrange Forecast	1,120,000 +37%	£185mn +28%	520,000 +25%	£155mn +25%	600,000 +50%	£30mn +50%
2020 Top range Forecast	1,160,000 +44%	£200mn +37%	560,000 +35%	£169mn +44%	600,000 +50%	£30mn +50%
2013	804,000	£146mn	415,000	£126mn	390,000	£19.5mn

directly contribute towards the national priorities.

Source: Dundee STEAM Global Tourism Solutions Final Trend Report for 2013. 2020 forecasts Blue Sail analysis. Price base 2011 (as National Tourism Strategy).

7 WORK PROGRAMMES

Five programmes were developed and reported on at each of the DTAG quarterly meetings.

1. Programme 1: Establishing the profile

Highlights – One City Many Discoveries campaign (videos, journalists, bloggers); Dundee.com; Dundee Waterfront; V&A Dundee; Cruise; Travel Trade; Golf; UNESCO, Universities

2. Programme 2: Investing in our tourism offer

Highlights – New hotels; New products/attractions such as new exhibits at Dundee Science Centre and Discovery Point; Itinerary Development; East Scotland Explorer Card; Industry Fam Trips

3. Programme 3: Managing the place for visitors

Highlights – Dundee Waterfront infrastructure; Rail Station; Wayfinding; WorldHost™; Tourism Trails

4. Programme 4: Jobs & Enterprise

Highlights – Scottish Enterprise Cultural Tourism Fund; Connect Local; Destination Leaders Programme; Chefs@school; Chef Recruitment event with Dundee & Angus College; Youth Conference; WorldHost™

5. Programme 5: Working Together

Highlights – Dundee Tourism Action Group quarterly meetings; closed Facebook pages; formation of Dundee & Angus Visitor Accommodation Association Scottish Enterprise Events; Scottish Development International workshops; Business Gateway Digital Boost; Visit-Scotland

Mid Term Action Plan

Digital

Action	Lead
Create City Brand Toolkit	Dundee Brand Group
Social Media Content Plan & Take Over	Dundee Brand Group
Bookable Products – we need to increase the no. of products/services that can be booked online	All – DAVAA, Food & Drink, DSEN, Cultural Agencies Network, Visit-Scotland
What's On/The List	One City Many Discoveries
Resource for Businesses	Dundee Tourism Action Group
Digital Capabilities	All delivered by Digital Tourism Scotland

Welcome

Action	Lead
WorldHost™ Customer Service	Dundee City Council & Tourism Industry
Street Dressing	Dundee City Council
Skills Gap/Social Justice	DAVAA, Food & Drink
Inclusive City	All & Dundee Social Enterprise Network/Euan's Guide
Creative Concierge	V&A Dundee
Volunteer Programme	Dundee City Council, DSEN & DVA

Accommodation/Overnight Stays

Action	Lead
Development of Bookable Packages	All – DAVAA, Food & Drink, DSEN, Cultural Agencies Network, VisitScotland
City Pass	All – DAVAA, Food & Drink, DSEN, Cultural Agencies Network, VisitScotland
Price Point for Accommodation	DAVAA
Bookable Products (as listed in Digital)	DAVAA

Food & Drink

Action	Lead
Create Food & Drink Network	Fuller Thomson & DAVAA
Feasibility of Food Market	Scottish Enterprise/Scotland's Food & Drink
Food Tours	Dark Dundee