

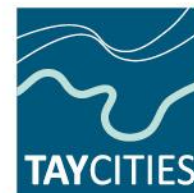
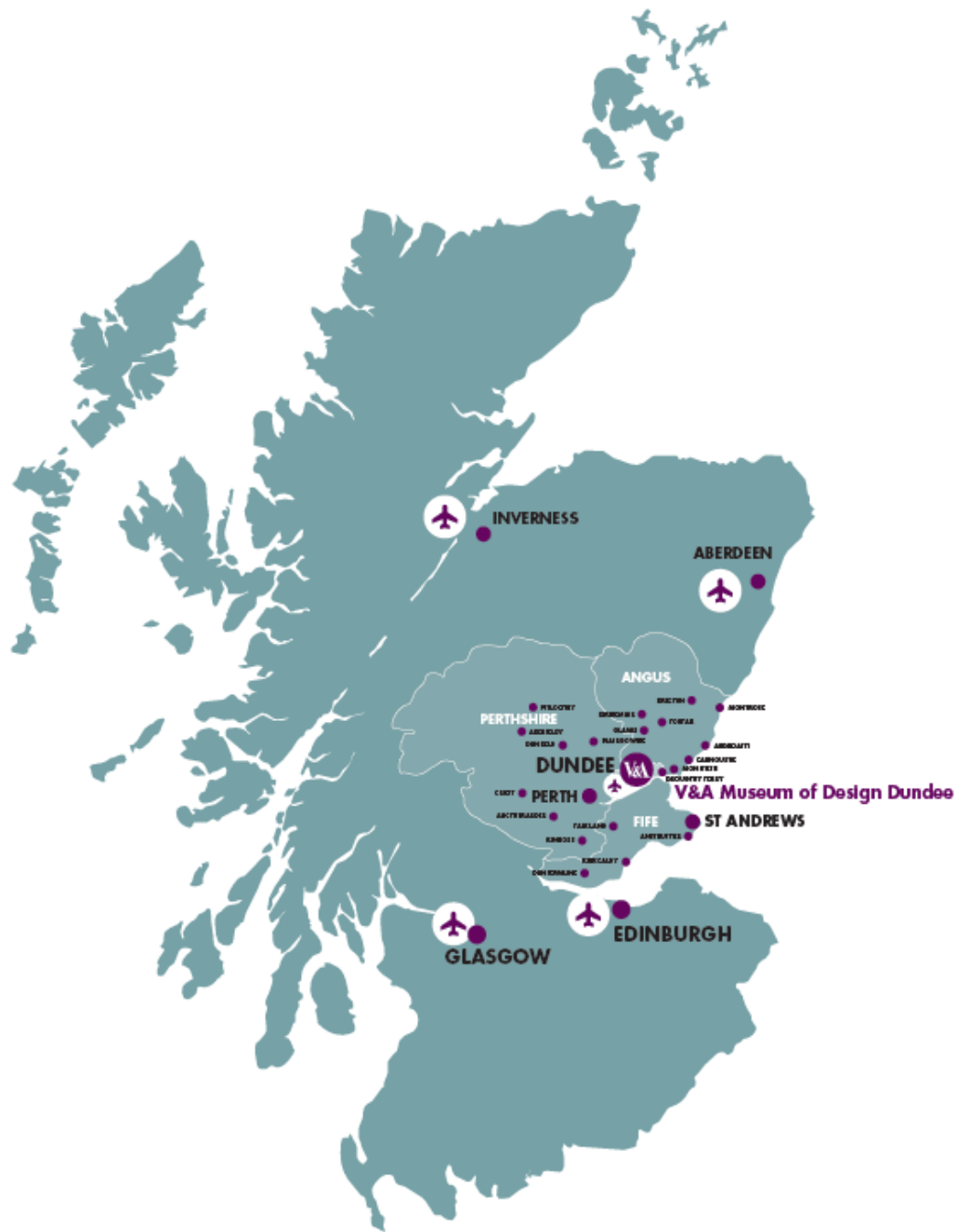


# A Regional Approach to Tourism

Tay Cities Region Joint Committee

18 May 2018





Smarter + Fairer

## Background

- Audit and Appraisal of Tourism Opportunities in the East of Scotland
- Focus on Angus, Dundee, Fife and Perthshire going forward

## Rationale for Greater Collaboration

- V&A Dundee
- Regional proposition to strengthen destination appeal
- Pool resources

## Tay Cities Deal

- A new approach to economic development
- Asks/Offers

# Regional Tourism Performance

Strong tourism business base – 2,455 (2016)

- Accounts for 11% of business base
- Most businesses in Perth & Kinross
- Slower growth (8%) than region's overall business base (14%) since 2010
- But growth greater in Dundee (15%) – driven by expansion of accommodation and food service

Employment in tourism-related sectors is 26,200 (2015) – 15% of overall employment

- Highest in Perth & Kinross (19%)

But productivity is low – GVA per tourism employee is £14,600 v. £16,900 across Scottish tourism economy

- Tay Cities Region average is £39,000 per employee

# Regional Tourism Performance

## Visitors to Tay Cities Region in 2015

- 1.5m overnight visitors
  - 1.3m UK overnight visitors, remainder overseas
  - 18.6m day visitors
- 5% decline in visitor numbers since 2009
  - 27% decrease in Angus and Dundee
  - Increase in overseas visitors offset by fall in UK visitors
- £358m spent by staying visitors (7% of Scottish total)
- £429m spent by day visitors



# Regional Approach

## Strategic Context

- Tourism 2020 – national strategy
- Tay Cities Deal 2017-27
- Regional economic strategy and partnership arrangements
- Formalise regional tourism partnership arrangements



# Developing a World Class Tourism Offer

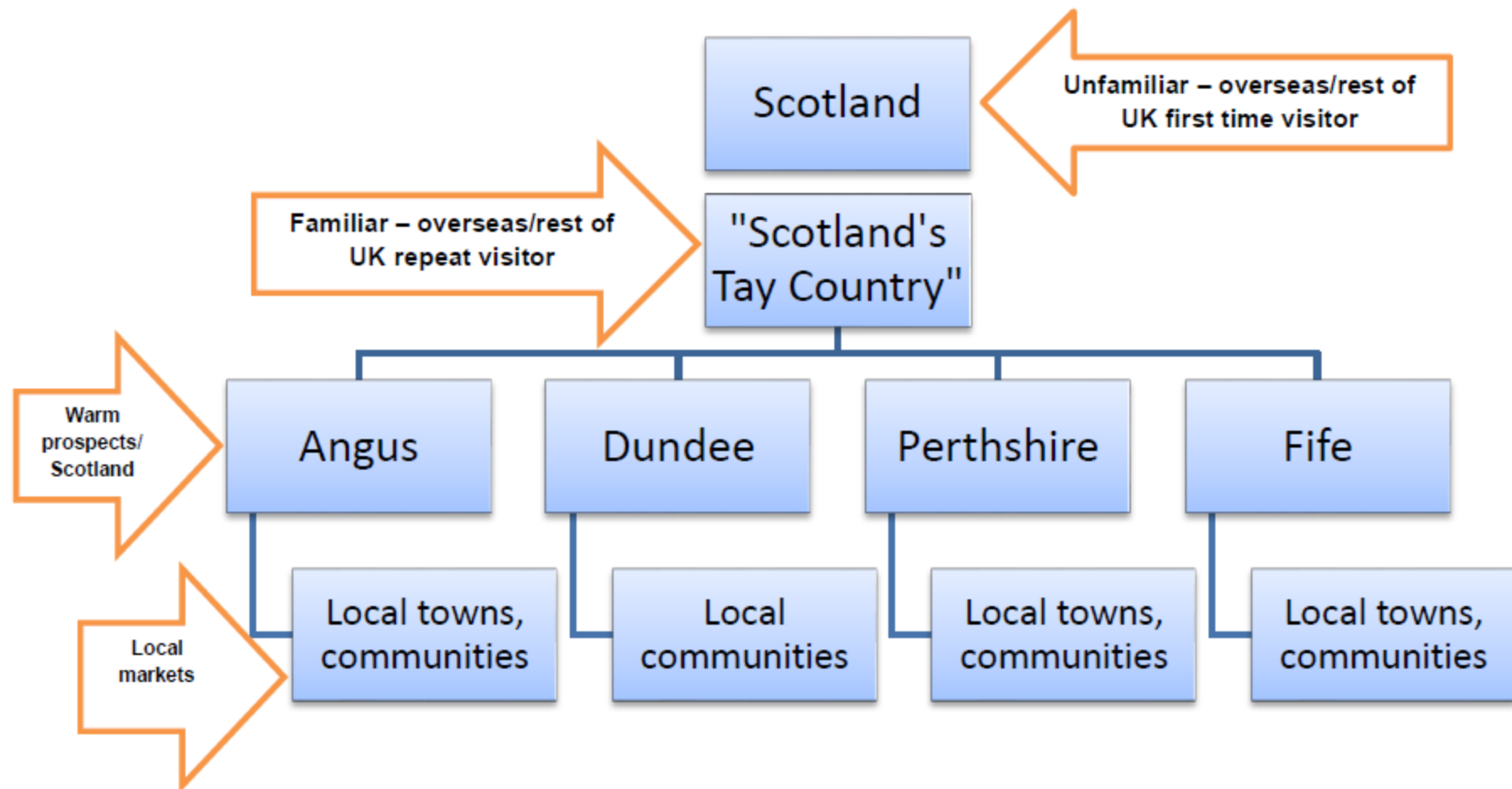
## Investment in Key Areas of Strength

- Cultural and heritage tourism investment programme

## Regional Destination Development

- Regional strategy & RTP strategic outline case
- Events and festivals development
- Business and skills development – digital capabilities
- Product development – meeting the needs of new and emerging markets
- Destination promotion to business and consumer markets – *“Scotland’s Tay Country”*







# Marketing Activities

## What have we done to date?

### Awareness Raising

- Travel media
  - International Media Marketplace
  - Travel writers & bloggers visits



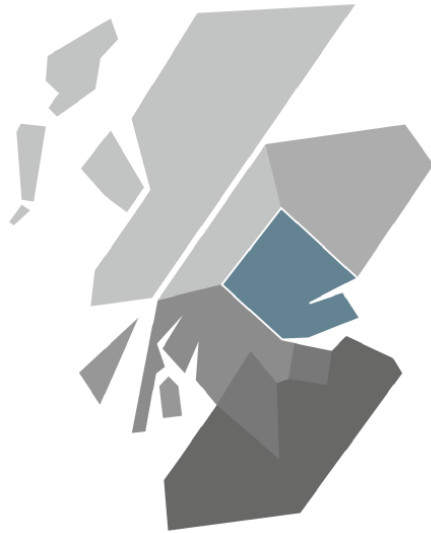
### Travel Trade Engagement

- Explore GB
- VisitScotland Expo
- World Travel Market
- Business Development Missions
- Tour operator visits and meetings
- Itineraries and experiences



design your stay in

# Scotland's **Tay** Country



# Consumer Campaign

## Campaign development

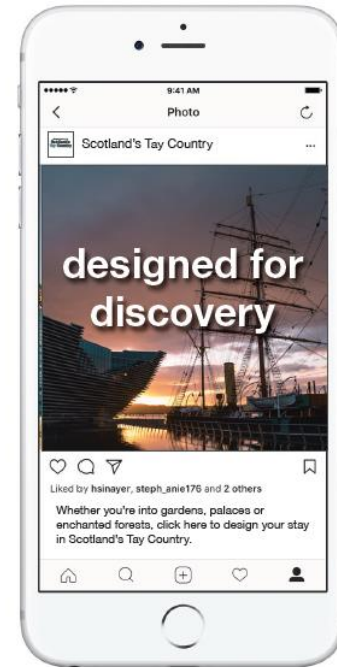
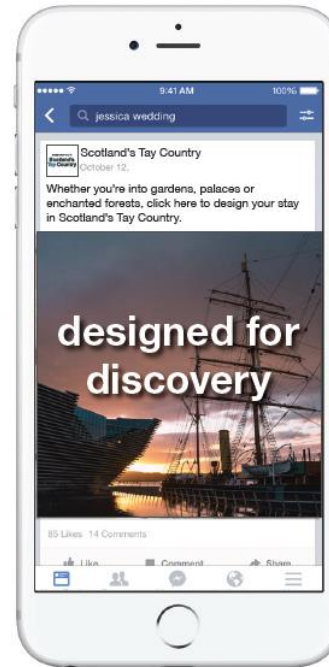
- Research & industry engagement; VS Growth Fund

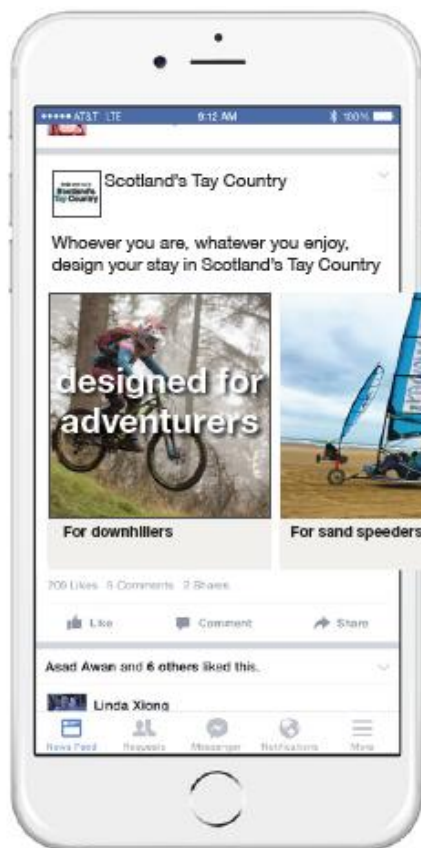
## Target segments

- *Food loving culturalists*
- *Adventure seekers*
- *Curious travellers*

## Digital campaign

- Display banners
- Paid social media: Facebook; Instagram
- Social media: #TayCountry
- Microsite: taycountry.uk
- Two bursts: May/June; Aug/Sept
- KPIs: impressions; reach; CTR; CPC...





For sand speeders



For dolphin spotters



For pin-seekers



For jumpers



For climbers



For explorers



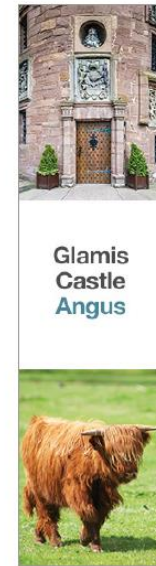
For adventurers

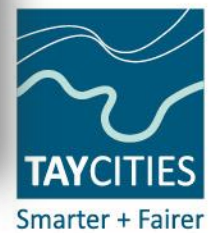
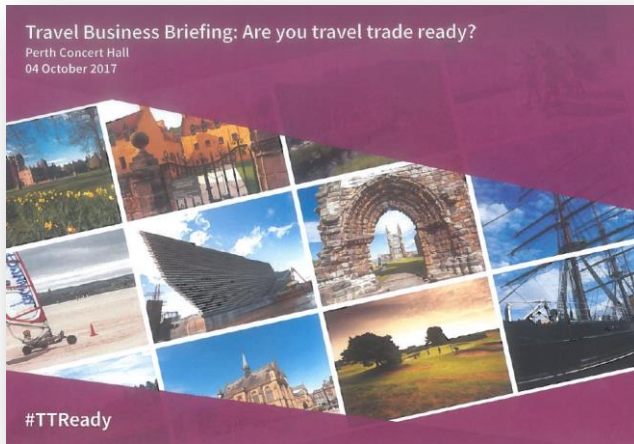


For hitchhikers









# Next Steps

Campaign Evaluation

Implementation of Early Action Programme

Alignment with Scotland is Now

Regional Tourism Partnership development

- Strategic Outline Case

Regional Tourism Strategy

Industry Engagement

