A Regional Approach to Tourism

Tay Cities Region Joint Committee
18 May 2018
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...
Scotland's Tay Country

Whoever you are, whatever you enjoy, design your stay in Scotland's Tay Country

designed for adventurers

For downhillers
For sand speeders
For dolphin spotters
For pin-seekers
For jumpers
For climbers

For explorers
For adventurers
For hitchhikers

design your stay in Scotland's Tay Country

TAYCITIES
Smarter + Fairer
designed for adventurers

White water rafting on River Tay

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designed for design lovers

V&A Dundee
Scotland’s first design museum

designed for drama

Glamis Castle
Angus

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TAYCITIES
Smarter + Fairer
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