

**Dundee's 5-Year
Tourism Strategy
2025–2030**

THE
UK'S
COOLEST
LITTLE
CITY

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This document provides **Dundee's Tourism Strategy** for the period 2025–2030. It starts by setting out the background including the strategic, market and industry context, based on which it proposes Dundee tourism's target audience, strategic priorities and headline KPIs against which successful delivery of the strategy may be measured.

This document has also been developed based on a review of national and local tourism strategies, input from the TLG's draft strategy as well as a series of consultations with stakeholders across Dundee's visitor economy.







Setting the Scene

Dundee has quickly evolved into one of Scotland's most exciting emerging cultural destinations, building international recognition for its unique blend of creativity, heritage, and ambition. Recent years have seen transformational developments, including the opening of V&A Dundee, the Waterfront, and the growth of an independent food and drink scene, all of which have elevated Dundee's profile as a vibrant destination.

The city's optimum location, surrounded by natural landscapes that invite adrenaline seekers, hikers and cyclists all add to the overall appeal of a city region with an ever-expanding range of activities that encourage visitors to stay longer. Broughty Ferry (included within the scope of this strategy) and its thriving small business community strengthens this appeal further, making Dundee a true 'city by the sea.'

Looking ahead, Dundee's visitor economy is well poised for further growth, with new projects such as the development of the Leisure Marina, Phase 2 of Discovery Point, and further ahead, the highly anticipated Eden Project Dundee. In addition, the £300 million Tay Cities Region Deal is helping to support a range of tourism and cultural projects that will further boost the appeal of Dundee as a prime place to live, work, study and invest.

However, challenges remain. As the city recovers from the COVID-19 pandemic and navigates economic pressures, a strategic and coordinated approach is essential to maintain momentum, build resilience, and adapt to new visitor demands. The strategy and action plan aims to bring Dundee's tourism sector together, aligning principally with Scotland Outlook 2023 and the Dundee City Plan 2022–2032, helping stakeholders to identify clear actions and pathways to capitalise on this momentum and broader opportunities.

Strategic Context

This strategy is aligned with key national and local policies including Scotland Outlook 2023, Dundee Strategic Investment Plan 2025, Dundee City Council Plan 2022–2027, among others referenced below. The key priorities set out in those documents include the need for:

- **Tourism-led Economic Growth** – Leveraging culture, events and the visitor offer as economic drivers is a central theme across Dundee's City Centre Strategic Investment Plan, Events Strategy and Cultural Strategy. Landmark attractions like V&A Dundee have underscored Dundee's positioning as a cultural hub. Even greater investment in community-based and neighbourhood initiatives could help to solidify this status further and foster a more balanced distribution of economic benefits, while expanding on the existing volunteering opportunities to deliver visitor experiences could help to bring visitors more frequently into contact with local people.
- **Commitment to Environmental Sustainability** – Dundee's plans consistently emphasise sustainability, with ambitious targets such as achieving net zero emissions by 2045. This priority is evident in the Climate Action Plan, Sustainable Transport Delivery Plan, and the integration of sustainability into the Events Strategy and Cultural Strategy. Across sectors, there's a clear commitment to promoting low-carbon transportation, active travel, and sustainable urban development. Tourism can make an important contribution to achieving all of these, including setting short-term goals that build momentum for longer-term progress.
- **Integrated urban development and infrastructure** – Various strategies such as the Waterfront Development Masterplan and Sustainable Transport Delivery Plan highlight the transformational impact of major infrastructure projects in the city. There is a clear intention to integrate better transport options, green spaces, and landmark features to improve both the functionality and aesthetics of the city. Looking ahead, it will be important to ensure that we boost the city's appeal by ensuring that visitors are able to enjoy these improvements in the same way as local residents.





- **Inclusive growth and social equity** – The City Plan and Council Plan prioritise tackling social inequalities and promoting inclusive economic growth. This includes efforts to reduce poverty, improve educational and employment opportunities, and ensure that development benefits all residents, particularly those from disadvantaged backgrounds. Ensuring that job creation, housing, and tourism benefits are equitably distributed will require ongoing monitoring and community involvement. Improving the social sustainability of tourism is a rapidly evolving area, and various areas of action have been brought into this strategy to reflect this.
- **Collaboration and financial sustainability** –Almost all the documents stress the importance of collaboration, between government bodies, local businesses, or community organisations. The Communications Strategy and Council Plan both highlight the need for strong partnerships, while the Events Strategy calls for greater volunteer engagement and sponsorship to overcome financial constraints. Several plans mention challenges related to funding and budget limitations. In tourism, there's an opportunity to explore more innovative financing models, such as public-private partnerships or community-led initiatives, to ensure financial sustainability and support the ambitious targets outlined.



Market Context

The following section explores a series of market trends that are particularly relevant to Dundee's evolution as a destination in recent years. Many of these trends were evident prior to the COVID-19 pandemic, however some trends have emerged since. Each trend is presented with implications for Dundee.

This strategy will address these priorities through the lens of tourism, ensuring that key stakeholders across sectors will have concrete, collaborative, and coherent actions plans to take forward in ensuring the tourism sector is fully prepared to capitalise on upcoming opportunities.

Trends	Implications for Dundee
Trend 1: City Breaks Are Back City breaks reclaimed their title from beach holidays as the favourite type of trip for British travellers, having grown significantly in popularity over the course of 2022–2023.¹	Dundee's growing appeal as a compact, culturally vibrant city makes it an ideal destination for short, accessible getaways. With its walkable layout, unique cultural landmarks, scenic waterfront and quick access to the River Tay, coast and countryside, Dundee is well-positioned to attract city break travellers from within Scotland, the UK and abroad with a compelling offer of 'Dundee Plus...'
Trend 2: Local People Matter (Even More) 79% of Gen-Z and Millennial respondents agree that they would love to partake in a day in the life of locals in the destination they are visiting – compared to 73% of respondents overall.²	Cities across Europe are connecting visitors with their neighbourhoods. With its naturally distinctive city areas and upcoming developments, Dundee has a unique opportunity to coordinate across sectors to enhance its destination offering. Greater exploration encourages visitors to stay longer and explore further; this also applies to local residents, including the city's many students and those coming to visit them. Developing and promoting tourism in city neighbourhoods can spread positive socio-economic impact across the city. At the same time, tourism development should always be done with communities not to them, with close coordination required among a wide range of stakeholders a prerequisite.

¹ Source: Holiday Habits 2023-24 Report (ABTA, 2023)

² Source: Global Travel Trends Report (American Express Travel, 2023)

Trends	Implications for Dundee
Trend 3: Local immersion and authenticity drive cultural tourism On holiday, British travellers want to experience the culture, learn something new, and look for enrichment through travel. 79% of British travellers agree that cultural experience is key to getting to know a country/place.³ Over 25% of British travellers choose their next holiday destination based on 'Having culture and historical sites in/near my holiday destination', ranking the second most important influence factor after 'climate' among British travellers in 2023.	With recent global events, local immersion and authentic experiences are increasingly becoming a priority, with strong interest in culture, communities and nature driving tourism demand. Along with arts and heritage, there is an opportunity for Dundee to further develop other authentic experiences across outdoor, leisure and wellness themes.⁴ Placing a strong emphasis on authenticity, sustainability, and personal enrichment across these offers is key to engaging with cultural travellers.
Trend 4: The Rise of Conscious Travel 76% travellers want to travel more sustainably in 2024⁵, Consumers around the world are making more mindful decisions when travelling, such as visiting local cultural or historical sites (46%), using more environmentally friendly transportation options (43%), and travelling to smaller, lesser-known destinations (41%) – and more want to do so in the future⁶.	Sustainability has been the shared top priority across key policies in Dundee and there is now an opportunity to showcase the city's innovation and ambition in this field and tell its sustainability story with pride. Furthermore, visitors are increasingly looking to seek beyond the 'postcard attractions' and post-pandemic destination marketing campaigns are responding by becoming less 'product driven' and more about how the city will make people feel, the effect it will have on them; amplifying the essence of the place, its people and its culture. This, as well as a focus on sustainability could provide an opportunity for Dundee to refresh messaging around the city's core proposition.

³ Source: UK travel trends 2024 (YouGov, 2024)

⁴ Source: The expanding role of cultural explorers in shaping global tourism (Euromonitor, 2024)

⁵ [Source](#): Sustainable Travel Report (Booking.com, 2023)

⁶ [Source](#): Travelers' interest in sustainable tourism options increases (Expedia Group, 2023)

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Trends	Implications for Dundee
Trend 5: Our Data-Driven World Increasing capabilities in data management for business intelligence, marketing and community engagement is included among Top 10 strategies for destinations for 2024.⁷	Dundee has many visitor touchpoints that could help add valuable layers of information about who's consuming our leisure and cultural attractions. There is an opportunity for Dundee to increase its capabilities for capturing, analysing and sharing data to empower members and inform city-wide intelligence and guide marketing, collaboration and innovation.
Trend 6: Social Media Rules The Roost 40% of Gen Z (18 to 24-year-old) users are turning to TikTok or Instagram instead of Google Search or Google Maps when it comes to looking for information – this also extends to the world of travel.⁸ Yet the influence of social networks in trip planning isn't limited to younger consumers, as social media use becomes more consistent and widespread across all age groups.	The heavy use of social media among consumers of all ages, (notably those in the Gen Z, Y, and X brackets, underlines the need to boost our digital capability and maximise opportunities to harness local pride and passion through online channels. The power of mobilising tech more broadly to pique visitors' interest shouldn't be underestimated for Dundee, particularly with its unique appeal from being the birthplace of Scotland's video gaming industry and the new cultural hub. Therefore, to attract younger visitors and Gen X alike, there is a significant opportunity for Dundee to enhance its profile on these highly visual, inspiration-leaning social media platforms such as Instagram and TikTok.

40% of Gen Z users are turning to TikTok or Instagram when searching for information.

⁷ [Source](#): For the NEXT Generation of Destination Organisations (Destinations International, 2023)

⁸ Source: Travel Trends Report (Ogilvy, 2023)



Industry Context

Dundee's tourism offer is on a dynamic growth trajectory, bolstered by substantial investments, a strong collaborative approach, and a series of large-scale infrastructure projects. This momentum is establishing Dundee as a must-visit emerging city destination in Scotland, attracting both new developments and visitor interests. Developments underway include:

- **HMS Unicorn:** One of the oldest ships afloat in the world, HMS Unicorn will undergo development to feature a new visitor centre and be relocated to the restored historic East Graving Dock, with an anticipated opening by 2028/29. (Part of Tay Cities Deal, conditional on match funding)
- **Tay Adventures & Leisure Marina:** A new leisure marina facilitating a series of land- and water-based projects at the mouth of the River Tay, the largest river in Scotland, enhancing Dundee's waterfront appeal and boating tourism. (Part of Tay Cities Deal, conditional on match funding)
- **Dundee Museum of Transport:** Work is underway to transform Dundee's last remaining tram depot into a brand new visitor attraction out with the city centre to accommodate Dundee's Museum of Transport.
- **Discovery Point Phase 2:** This redevelopment will transform the café to feature river views and establish a permanent exhibition space, creating an enhanced visitor experience along the Tay. (Part of Tay Cities Deal, conditional on match funding)
- **Eden Project Dundee:** The highly anticipated Eden Project will establish Dundee as a flagship destination for ecological engagement and immersive visitor experiences. Currently forecasted to open in 2029, this project aligns with Dundee's environmental priorities, promising to attract significant visitor numbers and drive positive economic impact.

The Eden Project will establish Dundee as a flagship destination for ecological engagement and immersive visitor experiences.

- **New Feasibility Studies:** Two feasibility studies have recently been completed to assess Dundee's needs in live entertainment and conference/meeting facilities. Additionally, a forthcoming hotel demand study will provide insights into the city's future accommodation needs, especially as visitor numbers grow.
- **Cruise Arrivals:** Dundee's popularity as a cruise destination is expected to remain or to increase, with 16 cruises docking in 2024 and passenger numbers exceeding 16,000. The city's welcoming approach, supported by volunteer-led greeting services and visitor resources, has garnered positive feedback from passengers, adding value to Dundee's reputation. With plans to develop more shore-based experiences for cruise visitors, the city could stand to gain further from cruise visits.
- **Hotel Developments:** Recently, there has been extra investment in refurbishing hotels across the city to make the spaces more attractive for visitors. This includes the refurbishment of Malmaison, renowned for its distinctive character, and the £1 Million refurbishment of Hotel Indigo and Staybridge Suites, contender in the Scottish Design Awards in 2019, to develop a new bar area, which opened this April.
- **Business tourism:** The Dundee City Region Convention Bureau secured 24 conferences for the city last year attracting over 6,000 delegates. They have already secured 12 conferences for 2025 and are forecasting 6,000–10,000 delegates over 20–30 events with approximately £6–10 million in economic impact.
- **Dundee's growing appeal as a food and drink destination:** A cultural scene and cityscape in continual evolution are further boosted by the continual expansion of Dundee's food and drink offer. The city lies close to one of the most important food producing regions of the UK, and is well positioned to pitch the close provenance of its food and drink as a key asset, further strengthening the itineraries which are now available [online](#). 2024 saw the launch of the Dundee Food Festival together with an array of fringe events, and the city continues to see new openings of independent and charismatic bars, cafes and restaurants, attracting locals and visitors of all age groups.





Audience Profile

In recent years, Dundee has seen gradual increases in visits from the rest of GB and internationally (a 72% rise in visits since 2012), as well as a rise in the number of tour groups including the city in their itineraries. This is in addition to the powerful local/regional market, and overall has driven a recovery in visitor numbers from pre-pandemic levels. Using data from visitor research and existing data from VisitScotland, Dundee City Council and V&A Dundee, the following table gives a glimpse of the visitors who come to Dundee (*NB: more in-depth visitor profiling research is foreseen as one of the recommendations in this strategy*):

Source	Key Insights relevant to Dundee
Scotland Visitor Survey 2023 ¹	• Country of Residence: 73% of visitors to Scotland came from the domestic market, with 27% within Scotland and the rest from England, Wales and Northern Ireland. • Demographic: 50% of visitors to Scotland are aged over 55. Almost is in the 35-54 range, and 17% aged 16-34. • Life stage: 44% were at an older/independent life stage with a further 25% being of retirement age. Families made up 14%, with 15% in the pre-nester life stage. • Motivation: 85% of visitors to Scotland is purely on a leisure break. 13% were visiting friends and family. Only 4% were combining a business visit with a leisure trip. • Travel size: the average number of visitors in a party is 2.8. 66% of visitors to Scotland travelled with their partner or spouse, 16% were travelling with children under 16. Only 9% is solo traveller. Among European travellers: • 50% of travellers were first time visitors to Scotland. • 28% were in the 16-34 age range, youngest of all markets. • 72% toured around Scotland staying in 2 or more places. • The average number of nights spent is 10.4.

¹ [Source:](#) Scotland Visitor Survey 2023 (VisitScotland, 2023)





Visit Scotland Visitor Survey, Local Area Factsheet- Dundee ²	Based on a sample of 200 overnight visitors, in 2023: • 65% were domestic visitors (18% Scotland, 48% rest of UK) • 35% were international visitor (incl. 14% from Europe and 18% long haul) • 16% were pre-nesters and families, 52% were older independents and 31% were of retirement age • 82% were repeat visitors to Scotland • Visitors were spending 2.7 nights in Dundee, as part of their average 8.7 night stay in Scotland
Visit Scotland Research and insights on tourism in Dundee and Angus ³	In 2021, Dundee saw a turnover from tourism of £121 million In 2022, tourism represented nearly 10% of employment in Dundee, accounting for 6,000 jobs. In 2023, the city had 400 tourism businesses, accounting for nearly 12% of all businesses in the city.
STEAM Report for 2012-2023 ⁴	Visitor Numbers: total visitors in 2023 reached 1.36 million, marking a 10.4% increase from 2022 (and a 72% increase since 2012) Day visitors accounted for 48% of the total visitors, representing a 15.1% increase from 2022, while staying visitors comprised 52% of the total visitors, marketing a 5.8% decrease from 2022. Visitor Days: Dundee saw 2.53 million visitor days in 2023, with staying visitors contributing to 74% of the total visitor days.
V&A Dundee visitor research 2018-2023 ⁵	International visitors: overseas visitors have accounted for between 9% and 11% of respondents in exit surveys from 2018 to 2023 (excluding the period 2020-2022 when it was <1% due to Covid travel restriction). Dundee local resident visitors: local residents have accounted for between 14% and 25% in exit surveys from 2018 to 2023. Scottish visitors: have accounted for 41% - 65% of the respondents, representing the majority of V&A Dundee's visitors since it opened. Visitors from the rest of the UK: have accounted for between 14% to 25% of respondents from 2018 to 2023.

² Visit Scotland Research and Insights on Dundee and Angus, [source](#)

³ Visit Scotland Research and Insights on Dundee and Angus, [source](#)

⁴ Source: Dundee City Council, confidential

⁵ Source: V&A Dundee, confidential

Target markets:

In preparing this strategy, useful high-level visitor data was gathered in order to identify the below general target markets that are more relevant to Dundee than others. (NB: There is a significant opportunity for organisations beyond V&A Dundee to actively contribute visitor data to help build a clearer profile of visitors to Dundee. Further audience research is required to inform more detailed targeting and segmentation).

Further research will be required to understand:

- Visitor/audience data and insights from a range of venues cross sector relevant to the visitor economy in Dundee, to generate audience insights beyond those who visit V&A Dundee.
- Motivations to visit: why visitors are coming to Dundee, and how this can be optimised in order to convert existing awareness to actual visits.
- Audience segmentation: segmentation based on motivations and behaviours rather than simple demographics and duration of stay
- Attitudes of visitors: perceptions of Dundee and how it differs between different audience segments.

Target markets

Residents of Dundee and Tay Cities Region

Scottish visitors from the rest of the Scotland seeking short breaks (e.g. families)

UK leisure visitors from outside of Scotland visiting Scotland.*

The following VisitScotland [target audiences](#):

Engaged Sightseers, Food-Loving Culturalists, Adventure Seekers, Curious Travellers.

'Business Extenders' UK & International business visitors to Dundee and Edinburgh seeking to extend their trip

Visiting Friends and Relatives (VFR): With a growing population in general, and Scotland's highest student population ratio,⁹ VFR visits to the city can be proportionately significant (in particular at graduation time).

International visitors to Scotland* with an interest in arts and culture, design and city trips

(*) This includes UK and international visitors to nearby popular destinations (e.g. St Andrews, Edinburgh, Glasgow)



Market Positioning: 'The UK's Coolest Little City'

Dundee is carving out its place as 'the UK's Coolest Little City', being a compact, yet vibrant destination that offers a unique mix of culture, creativity and character. Quoting one of the interviewees that felt across the board: "we are in the 'sweet spot' of Scottish tourism. Not too busy, not too quiet, comfortably busy and with plenty to do without the stress of bigger cities and offering better value to the visitor. Internally, we are well placed for Scots to come and visit us without travelling too far. Non-Scottish visitors can set up camp here, enjoy amazing visitor attractions but be within easy reach of a huge amount of the Scottish tourism appeal."

Dundee's unique strengths:

- **A sense of fun** – Dundee is home to the *Beano*, an iconic British comic that reflects our playful spirit.
- **Warm welcome** – Visitors feel the city's warmth and light-hearted energy from the moment they arrive.
- **Optimal size** – Dundee is compact, walkable, and convenient.
- **Breathtaking Location on the Tay** - Dundee's stunning south-facing location along the River Tay offers spectacular views and a natural attraction that captivates visitors, whether they're relaxing by the water or enjoying outdoor activities.
- **Green credentials** - Sustainability is a core value for Dundee. It boasts more green spaces per capita than any other Scottish city.
- **Sunshine Capital of Scotland** - Dundee is Scotland's sunniest city with an average of 1523 hrs of sunshine per year.
- **Connectivity** – Dundee is just an hour away from Edinburgh, with frequent, eco-friendly bus services provided by Ember (2 per hour) and ScotRail (every 30 minutes). Travelling here is easy, with various low-carbon options available.



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OPTICAL BOUTIQUE

TIBETAN
MIRACLE
SEEDS

SCOTTISH JAIL MUSEUM

vex

Coca-Cola
Coke

BISTO

MARSHALL

CATV
01794 8455



- **A Youthful Energy** – One in five Dundee residents is a student, infusing the city with creativity and youthful vibrance.
- **Abundant Activities** – Dundee offers something for everyone, from free outdoor and indoor activities to interactive creative workshops that bring visitors closer to the city's adventurous spirit.
- **A Culture of Creativity and Discovery** - From Scientific wonders and Antarctic adventures, to spotting dolphins, Lemmings or Desperate Dan, Dundee celebrates curiosity and wellbeing with creativity pulsing through every activity.
- **Microbusinesses with a big impact** – The city's many microbusinesses (incl. independent retailer) add to the fabric of the local community and enhance the city's authentic appeal and sense of uniqueness.
- **Design is in the DNA:** Dundee is home to Scotland's design museum, V&A Dundee, the first and only V&A museum in the UK outside London; We're the UK's first and only UNESCO City of Design.
- **Food and Drink** – from famous brands to independent foodies, Dundee has an amazing foodie heritage with our very own Dundee Cake, Keillors Marmalade and Desperate Dan's cow pie. Around 70% of Scotland's fresh produce is grown within 30 miles, from Perthshire raspberries to Aberdeen Angus beef.

Tone of voice

Dundee's identity is warm, welcoming, and unpretentiously world-class.

The tone of voice is:

- Friendly and approachable, inviting visitors to feel at home.
- Fun yet aspirational, celebrating the city's achievements and unique brand of cool.
- World-class in quality, yet true to its down-to-earth roots.

One in five of Dundee residents is a student, infusing the city with creativity and youthful vibrance.

Dundee's Tourism Strategy: Vision, Ambition and Strategic Priorities

Vision: what a thriving tourism sector will contribute to Dundee

Tourism makes a significant contribution to making Dundee a thriving, prosperous place that provides a high standard of living to local residents, supports a buzzing cultural scene and vibrant tourism businesses across hospitality, accommodation, events, attractions and unique experience providers. This helps to cement Dundee's international reputation as an inclusive, forward-thinking city with a rich history of innovation and access to spectacular natural assets.

Ambition

Dundee will be acclaimed as Europe's Best Emerging City Break Destination by 2030, offering a high-quality, compelling range of activities and experiences that will attract visitors, all year round.

**Dundee will be acclaimed as
Europe's Best Emerging City
Break Destination by 2030.**





Key Objectives

Based on the analysis presented above, as well as an analysis of stakeholder input, this strategy should pursue the following overarching objectives:

- **Contribute to a thriving economy;** by growing and supporting good quality, sustainable jobs and driving visitor spending year-round.
- **Increase dwell time** in the city; to additional half days, days and overnight stays, according to visitor profile.
- **Increase bed nights all year round**, with Dundee offering a compelling range of year-round activities and experiences that convince visitors to stay for a short break.
- **Continue to enhance the overall reputation of the city** and change perceptions by offering a unique, consistently high quality, engaging experience for visitors and marketing the city's diverse experiences with pride.
- **Take an inclusive approach by continually involving and engaging residents of all backgrounds** in the growing range of cultural attractions and sector development, expanding their role as the city's best ambassadors.
- **Grow sustainability as a strength**, by supporting visitors and businesses to act in responsible ways that have a positive impact on the city's environment, communities and economy.

Dundee's Tourism Strategy supports visitors to act in responsible ways that have a positive impact on the city.

Strategic Priorities

This strategy is structured around four strategic priorities, each aligned with Scotland Outlook 2030, and designed to support the delivery of Dundee's tourism ambition to become Europe's Best Emerging City Break Destination by 2029. Under each of the following four priorities, a series of action points that describe, in broad terms, how this priority will be addressed, as well as measurement for success.

1. Attract, develop, and retain skilled, committed, diverse and valued people ('Our Passionate People')
2. Create and develop a thriving city together (Our Thriving Places')
3. Engage visitors with high quality experiences that play to our strengths as a city ('Our Memorable Experiences')
4. Build business resilience, sustainability, and profitability in Dundee's visitor economy ('Our Diverse Business')

Strategic Priority 1

Help Dundee's people to prosper from a thriving visitor economy ('Our Passionate People')

We will do this by

- Creating greater opportunities for Dundee's residents to become part of delivering the tourism experience (as employees, entrepreneurs, volunteers, or ambassadors)
- Highlighting diverse opportunities for local people to develop their career and boost their skills through the visitor economy
- Supporting the existing tourism workforce with continuous professional development opportunities to enhance job satisfaction and retention
- Ensuring that local people have the opportunity to participate in decision making about tourism in Dundee
- Exploring ways to ensure that the impact of visitor spending helps to support vulnerable communities in Dundee

Measures for success

- Number of sustainable jobs created in the city's tourism sector
- Number of new work experience placements supported in a year
- Opportunities created for residents to feed into tourism plans that may affect them
- Initiatives linked to the visitor economy that support local social programmes



Breakfast 9-3pm

- Rusty Calzone, Capri Sausage, N. B. Burger
- Eastfield Baked Beans, Pulled Egg, Sandwich
- Tasty Sausage, British Links, Gravy, Mashed
- Full English, Pancakes, Xmas Pudding, Corn Fritter
- Full English, Greek Yoghurt, Cinnamon
- Baking, Sandwiches, Full English

Drinks

- Rusty Calzone
- Mashed
- Harissa
- Lemon

Choose

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Strategic Priority 2**Create and develop a thriving city together
(Our Thriving Places')****We will do this by**

- Supporting the case for investment in key assets such as the Waterfront and Eden Project Dundee, whilst balancing big-draw attractions with existing arts and culture offer and smaller points of interest to share resources and attention
- Reflecting Dundee's UNESCO Design City designation and its thriving community of creatives, place arts and culture, design and the creative industries at the centre of the visitor experience, giving a sense of place and creating opportunities for play and interaction
- Working with local businesses and communities to increase the visibility and appeal of specific neighbourhoods for visitors, to spread the impact of tourism more evenly through Dundee e.g. Broughty Ferry, West End
- Creating new reasons for residents and visitors to visit the city centre more frequently e.g. leisure and hospitality
- Support delivery of the events strategy, in doing so change perceptions of the city and continually attract new audiences, and that together, the city's visitor economy stakeholders can draw maximum value.
- Ensuring that the city obtains maximum value from cruise ship calls, while mitigating any visitor management issues that these may have
- Ensure that wherever possible, visitors are encouraged and supported to reduce the environmental impact of their visit, for example, by using low-carbon transport, enjoying opportunities for active travel and buying from local producers

Measures for success

- Increased number of packages throughout the year that spotlight existing and new attractions
- Increased number of high-quality events and offers during targeted high and off-peak seasons
- Winning target awards

Strategic Priority 3**Engage visitors with high quality experiences that play to our strengths as a city ('Our Memorable Experiences')****We will do this by**

- Building a cohesive visitor journey by ensuring that promotional materials, visitor information and digital channels align with Dundee's welcoming ethos and share consistent compelling messaging
- Increasing the number of high quality, bookable experiences to increase the city's appeal, in particular opportunities to:
 - - Bring visitors closer to the creative industries with hands on/ learning activities across the city's many attractions and experiences
 - - Tell the city's unique stories and wellbeing/adventure experiences that capitalise on our stunning natural assets
- Ensuring that these experiences are well positioned in our key markets (direct to consumer and the travel trade) - thereby expanding perceptions of what the city offers beyond the key attractions
- Ensuring that key elements of our strengths are integrated into visits by MICE visitors, encouraging them to extend their stay and explore the area more widely
- Developing an events calendar that appeals to visitors and local people throughout the year
- Using diverse marketing initiatives to help shape perceptions about Dundee and its strengths as a city destination

Measures for success

- Increased number of bookable experiences
- Increased number of creatives engaging directly with visitors
- Increased number of startup tourism experience providers
- Increased business usage of an improved, shared event calendar
- Monthly reach, engagement and booking conversions (depending on campaign goals)
- Clear online offer taking external audiences through funnel from awareness (Dundee.com) to booking (VisitDundee)
- Increased overnight visitors during targeted high and off-peak seasons
- Increased day visitors, particularly in shoulder seasons



GAIA by Luke Jerram

GAIA is a large-scale artwork by Luke Jerram, created in 2010. It is a giant globe of the Earth, made of paper, and is displayed in a museum setting.

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Strategic Priority 4**Build business resilience, sustainability and profitability in Dundee's visitor economy ('Our Diverse Business')****We will do this by**

- Carrying out research and facilitating partnerships that help us to understand those visitor markets which bring most value to the city
- Ensuring that Dundee is better positioned through promotion in these visitor markets
- Supporting opportunities which ensure that Dundee is as easily reachable as possible from these visitor markets
- Share insights on market intelligence, product innovation and other key areas to help local businesses take informed development decisions and promote the city
- Supporting year-round tourism and diversifying visitor demographics to reduce reliance on peak seasons, enhancing business stability and profitability
- Creating opportunities for businesses to expand their network both within the city and beyond (in particular the 'East Coast' offer of Edinburgh, St Andrews, Aberdeen) and wider perceptions about what the city can offer
- Support businesses in offering a wider range of locally made / sourced products, thus building resilience in the local economy and generating a stronger sense of pride and place

Measures for success

- Regular surveys with benchmarked questions embedded as part of the visitor journey, cross-sector
- Quarterly benchmarking and reporting of visitor research, with input from key players cross-sector
- TLG decisions made and strategy developed based on performance and data, via quarterly check-ins
- Sustainable marketing approach embedded (targets linked to sole use of sustainable digital providers and practices)
- Sales of locally made/sourced products through visitor economy businesses in the city



Headline KPIs

KPI	Year	Value	Observation
High Level Indicators			
Visitor Volume (Total number of visitor)	2023	1.36 million	10.4% increase from 2022.
Share of Visitor Type by duration	2023	Day visitor: 48% Staying visitor: 52%	Day visitors increased 15.1% from 2022 and staying visitors decreased 5.8% from 2022.
Visitor Days	2023	2.53 million visitor days	A minor decrease of 1.3% from 2022.
Average length of stay	2023	1.9 days (est.)	A decrease of 10.6% from 2022 (Divide the visitor days by visitor numbers).
Seasonality (Occupancy in Q1/2/3/4)	2023	710,370	+6.4% increase in visitor numbers YOY. Occupancy was highest in Q3, but Q1 showed the strongest growth, suggesting a rebound in early-year tourism.
Direct Expenditure	2023	218.22 million GBP	A 4.3% increase from 2022.
Economic Impact of Tourism	2023	290.86 million GBP	A 4.9% increase from 2022.
Direct Expenditure	2023	218.22 million GBP	A 4.3% increase from 2022.
Total Employment	2023	3,499 FTEs	A 5.4% decrease from 2022
Average Spend per visitor	2023	160 GBP	A 5.5% decrease from 2022 (Divide the Direct Expenditure by Visitor Volume).
Audience Profile			
Motivation of visits	-	-	Further research required.
Audience segmentations	-	-	Further research required.
Attitudes of visitors	-	-	Further research required.
Tourism sustainability indicators			

KPI	Year	Value	Observation
High Level Indicators			
Number of guest nights during off-season (Occupancy in Q1 & Q4)	-	841,360 (Q1 + Q4 combined)	Off-season performance was mixed: Q1 saw strong growth, while Q4 declined slightly. Combined, they contributed over 840,000 guest nights, showing a solid off-peak presence.
Resident sentiment on tourism. e.g. Number/percentage of residents who believe that tourism offer adds value to them	-	-	Baseline evaluation/visitor survey required.
<i>Visitor satisfaction</i> Positive rating of holiday/short break experience in Dundee	2023	52% Dundee (Scot av. 71%)	% of respondents giving 9 or 10 out of 10. Source: Scotland Visitor Survey 2023.
Likelihood to recommend Dundee as a holiday/short break destination		52% Dundee (Scot av. 82%)	
Number of tourism employers with the Living Wage Accreditation and the Living Hours Accreditation	-	-	Baseline evaluation required.
Number of tourism businesses with sustainability accreditation (e.g. Green Key for accommodation; Taste Our Best for food and drink)	-	-	Baseline evaluation required.
Number sustainability certified conference facilities			Baseline evaluation required.



DCA Dundee
Contemporary
Arts

Galleries
Cinema
Print Studio
Creative Space
Shop
Jute Café Bar

Delivery of this Strategy

The strategy development project led by TOPOSOPHY includes a dedicated module which is to examine the options for strengthening tourism governance and the financing to support it. This is due to be delivered by the end of Q1 2025.

Notwithstanding the eventual conclusions of this module, it is important to underline the following key issues related to tourism governance and delivery in Dundee to date:

- Strategic decisions relating to tourism strategy and implementation have, to date, been taken by the Dundee Tourism Leadership Group. The group is composed of key decision makers from major attractions, hospitality, accommodation and broader visitor economy businesses along with Dundee City Council representatives and VisitScotland.
- A broader informal Dundee Tourism Partnership Group provides a forum for visitor economy businesses of all sizes to network and stay up-to-date with major tourism-related developments in the city.
- Low-level strategic and operational/administrative support for the TLG and DTP is provided by Dundee City Council, which is also responsible for city promotion (through the Dundee.com website) and is a major funder of several of the city's major attractions.
- Dundee does not currently have a destination marketing/management organisation *per se*, thus as visitor numbers and spending have increased, the city has lacked the mechanisms to properly respond to the increased opportunities for business development that this has brought.
- It is also important to note the backdrop of major pressure on public finances which, as in many other Scottish destinations, has reduced the capacity of the local authority to deliver non-statutory services, including those related to tourism and the visitor economy.

Against this backdrop, it is important for:

- Projects and programmes resulting from this strategy to be well aligned with public spending objectives in other sectors, in order to unlock spending which may benefit the visitor economy.
- The city to explore regulatory and financing models which could help to support improved destination management and governance, such as a BID or the introduction of a visitor levy.

Pending the further developments within the area of funding and governance, the Tourism Leadership Group will work closely with the city's tourism businesses to significantly develop the city's destination offer, implementing dedicated staff resource, improving customer journeys, data collection and analysis and creating highly effective targeted campaigns, with the end goal of significantly increasing visits to Dundee and ensuring the tourism sector is fully prepared to capitalise on proposed future developments, such as Eden Project Dundee.

Dundee Tourism Action Plan 2025–30

A 5-year Action Plan setting out the approach to achieve the objectives of the strategy accompanies this document and should be used in conjunction to deliver on the ambition.

Thank you

Thank you to our friends and partners for supporting the film and photoshoot:

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Black Mamba	Malmaison
Discovery Point	Mills Observatory
Dundee City Council	Outdoor Explore
Dundee Contemporary Arts	Saltdog Marine
Dundee Heritage Trust	Shahbaz Majeed
Dundee Science Centre	Tartan Models
Eastfield	Temple Lane
EH9	The Blue Room
Grant Anderson Photography	The Eden Project
Flux Video	The Goldie Collective
Heart Space Yoga	Tommy Ga-Ken Wan
John Low	Viso Gelato
Land O'Spex	V&A Dundee



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