



**Economic and Social Impact of Dundee's  
Cultural Strategy and Action Plan  
Executive Summary**

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## Executive summary

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### Overview

Dundee has a focus on culture-led regeneration. The city has adopted a planned and long term approach to developing its cultural sector. This has resulted in a strong and unique offer that has supported the diversification of the city's economy, and is delivering benefits to businesses and people who live and work in the city. As well as the diverse range of cultural assets and programme of activities, the scale of what is provided is impressive, particularly for a city of its size. The V&A Dundee will undoubtedly add to this offer and has been described as a 'game-changer'. Culture in the city has been a strategic priority over many years and a great deal has been achieved; the V&A Dundee is now set to build on this.

Dundee's approach is underpinned by the Dundee Cultural Strategy and Action Plan, which covers the period from 2015 to 2025. It was developed by the Dundee Partnership in collaboration with a number of different Dundee based cultural agencies. Its objectives aim to build on Dundee's existing strengths in culture-led regeneration, and:

- Contribute actively to creating a healthy, more equitable, economically successful City;
- Make Dundee's cultural sector sustainable; and
- Build the confidence and self-esteem of Dundee's individuals and communities in their abilities.

This is part of the wider ambition of the Strategy: that 'Dundee will aim to be recognised as Scotland's leader of culture-led regeneration by 2018'.

ekosgen was commissioned by Scottish Enterprise on behalf of the Dundee Partnership to develop a sector profile for the Creative and Cultural sector in Dundee, and undertake an impact assessment of Dundee's cultural organisations engaged in delivering cultural activity aligned to the Cultural Strategy and Action Plan. The overall aim was to quantify the economic and social value of the Creative and Cultural sector in Dundee.

The impact assessment gathered data from 14 key organisations. This included those that focus solely on operating and delivering cultural venues and activities, as well as organisations with a wider remit (such as the universities). The resulting impacts were grossed up to estimate the impact of Dundee's Creative and Cultural sector as a whole.

## The impacts of the Creative and Cultural sector in Dundee

### Economic impacts

Organisations engaged in cultural delivery in Dundee generate considerable economic impacts and benefits. When considering grossed up impacts from study estimates, these organisations directly support up to 562 FTE positions per annum, generating £12.4 million of GVA. This increases to 782 FTEs per annum generating £21.8 million of GVA when the indirect and induced effects are included.

The impact is further boosted when the wider expenditure by cultural visitors and audiences at venues and events is captured. This supports up to 225 FTEs in the wider tourism sector, generating up to £8.7 million in GVA per annum, including indirect and induced effects.

The additional boost through visitor expenditure takes the total number of jobs supported on an annual basis up to over 1,000 FTEs generating £30.5 million of GVA.

**Table 1: Grossed-up annual employment and GVA impacts of Dundee's cultural organisations, 2016/17**

	FTEs	GVA (£m)
Direct	561.6	12.4
Indirect and Induced	225.1	9.4
Visitor Impact	225.0	8.7
<b>Total Impact</b>	<b>1,011.6</b>	<b>30.5</b>

*Source: ekosgen calculations based on organisation data*

## Social impacts

Cultural activity also supports a variety of social and wider community impacts, unlocked by volunteers helping to deliver activity as well as people engaging in cultural activities. In headline terms based on grossed up estimates, this includes the following:

- Engagement of volunteers generating a total economic contribution of almost £736,000;
- Potential for the volunteers to have experienced health and wellbeing benefits worth up to almost £2.3 million; and
- Wellbeing and educational benefits of up to £16.3 million per annum realised as result of audiences and participants engaging with culture and the arts.

The cultural activity delivered by organisations in Dundee has secured wide-ranging engagement from residents, community groups, schools and pupils, and groups with protected characteristics.

## Strategic impact and added value

Dundee's cultural offer is highly regarded for its strength and diversity. It is recognised as being remarkable for a city of its size, in terms of scale and variety. Dundee's UNESCO status provides ongoing opportunities to promote the city as a visitor destination to the other 29 cities across the world that are part of the Design Network. The opening of the V&A Dundee in September 2018 is an important opportunity for the city, and indeed the wider Tay Cities Region, with expectations that it will attract and establish a new visitor market that other organisations can seek to tap into and build upon. There is widespread support for its establishment and ensuring that the city-wide benefits are maximised. Other opportunities include the potential re-development/modernisation of existing venues, further development of the events programme and the delivery of creative and cultural projects that have been put forward for Tay Cities Deal investment.

The joined-up, long-term, strategic approach to developing the city's cultural sector provided by the Cultural Strategy and Action Plan has helped to ensure that culture remains firmly on the city's agenda and that there is continuity in the activities to develop and expand the sector. Commitment and coherence are two of the factors that set Dundee apart from other cities and cultural destinations that are now keen to learn from Dundee's approach and experience. A further key benefit of the Strategy,

and the strategic leadership that has driven the Strategy's development, is the widespread partnership working that it promotes. It regularly brings together organisations from across the city, promoting and supporting the bilateral relationships of organisations within the Cultural Partnership that are working together.

With a focus on culture-led regeneration across the city, the development of the Creative and Cultural sector has played an important role in supporting the wider economic development and regeneration of the Dundee and its economy. The cultural sector delivers a number of important benefits for residents and participants, including both wellbeing benefits and employment opportunities. In particular, partners have highlighted that the development of the cultural sector has helped to change perceptions of Dundee as a place to visit and live, increasing residents' pride and confidence in the city and adding to the quality of life and visitor experience that the city is able to offer. It has also raised the city's profile as a cultural destination, and has contributed towards the diversification of the city's economy. This can be further enhanced through regional collaboration across the Tay Cities Region.

## Future considerations

Aspects of the study were constrained by data availability, e.g. on visitor origin and profile, and on visitor spend. As such, the impact assessment was informed by national benchmarks that have been adjusted where possible to make them more applicable to Dundee. Whilst such challenges are not unique to Dundee, consideration should be given to how more comprehensive and consistent data can be collected across organisations, such as through the establishment of a common Monitoring and Evaluation Framework that can be used by cultural organisations across the city.