

V&A Dundee: An Impact Study

The first five years of
Scotland's design museum

September 2023

BOP
Consulting



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FOREWORD



Tim Allan CBE

Chair, V&A Dundee

V&A Dundee opened in September 2018 and in 5 years it has become impossible to imagine the city or the country without the museum.

This independent report confirms that V&A Dundee is serving as an engine for economic development, is an iconic symbol of ambition and is a demonstration that culture and creativity are worth investing in for the long term.

V&A Dundee is drawing people to the region and contributing to local investment. The numbers are powerful: the museum has generated over £300m to the Scottish economy, including over £100m in Dundee; attracted over 1.7 million visits to the museum, including 500,000 people who made their first visit to Dundee as part of trips to V&A Dundee. In the period between April 2023 and September 2023, the museum made a gross employment contribution to Dundee of 450 jobs and to Scotland of 1685 jobs, not just the people who work in the museum but the wider network involved across the creative economy.

This shows V&A Dundee is a critical organisation, driving investment in the north-east of Scotland, and enhancing perceptions of Dundee as an economic and cultural centre.

The partnership between V&A Dundee and its Founding Partners (V&A, Dundee City Council, the University of Dundee, Abertay University and Scottish Enterprise) along with our major funder the Scottish Government, have played a crucial and unwavering role in establishing V&A Dundee. This unique set of partners continues to support and shape the museum. Each one of the partners has made a unique and valuable contribution to the realisation and operation of V&A Dundee and its overall impact on the city and on Scotland.

It's important that we pause at this 5 year milestone, in order to thank our supporters, partners, members and museum team who have dedicated time, energy and financial support to establish the museum - and as we look to V&A Dundee's first decade, ask that they do not waver in their support of this truly unique and impactful cultural organisation. Our next 5 years will be critical, as we go further again in our drive to work in partnership to transform the economic, social and cultural ambition for Dundee and Scotland.

FOREWORD



Leonie Bell

Director, V&A Dundee

V&A Dundee's fifth birthday is a moment for us as a young museum to look back and learn as we plan for the future.

This report charts the impact to date for Scotland's design museum. It establishes evidence on the scale and speed of V&A Dundee's journey, chronicles the change and confidence that springs from culture and it sets out where we can improve. V&A Dundee is playing a pivotal role in enhancing the city's identity, cultural growth and reputation as a creative centre. The museum is emerging as a major cultural voice for design and culture in Scotland, generating joy and championing design and designers, underscoring the importance of siting Scotland's design museum in Dundee.

V&A Dundee has created an iconic building and new public plaza, connecting the city to the river as part of Dundee's waterfront regeneration. In our first 15 months, 1 million people came through the doors. In March 2020, the Covid pandemic closed the museum for months, with severe implications for many more.

This report illustrates the positive impact that V&A Dundee is making and recounts the journey to date. We are attuning to the context of our city, and with the wider sector we are absorbing the stark challenges that define the current cultural, economic and social environment. We remain resolutely ambitious for V&A Dundee, and for Dundee.

Alongside our peers and partners we are rebuilding audiences, developing new relationships and adapting to change. From Dundee, we are collaborating locally, nationally and internationally to create cultural experiences and opportunities for and with audiences to experience design of international scale and quality that did not exist before.

Beyond the numbers, we are asking what other types of less tangible value we are contributing to, and asking where we can generate more. We are listening to feedback and changing. We are working on new ideas for the museum, collaborating with cultural partners, designers, community groups and schools, deepening relationships with universities and corporate partners, and helping young people to consider the ways that design shapes the world around them.

The report offers a new interpretation for V&A Dundee. It articulates our commitment to being creative, civic, innovative and inclusive, and to the unique impact that a museum and international centre for design can have outside the central belt of Scotland. Within this new interpretation is a renewed energy to harness the potential of design as one of humanity's, and the planet's, most potent resources.

I want to thank everyone who has been part of creating and sustaining V&A Dundee. Every visitor, member and supporter who brings the museum to life. Our Founding Partners who enacted this extraordinary vision, to everyone who has worked with us, and to each team member who make the museum what it is today.

Huge thanks to everyone who has contributed to this report, especially BOP and tialt who produced it and Scottish Enterprise who helped fund it.

We hope this report tells a story beyond our own, a story of the fundamental value of culture, creativity and ambition, as reaching far beyond ornamental, to the heart of our potential prosperity. A prosperity that swells and rises from valuing human imagination and experience as part of cultural, economic, environmental and social change. To have a transformative, empowering and catalysing impact, culture needs to be funded, supported and valued at a level that enables it to flourish for all.

V&A Dundee in numbers

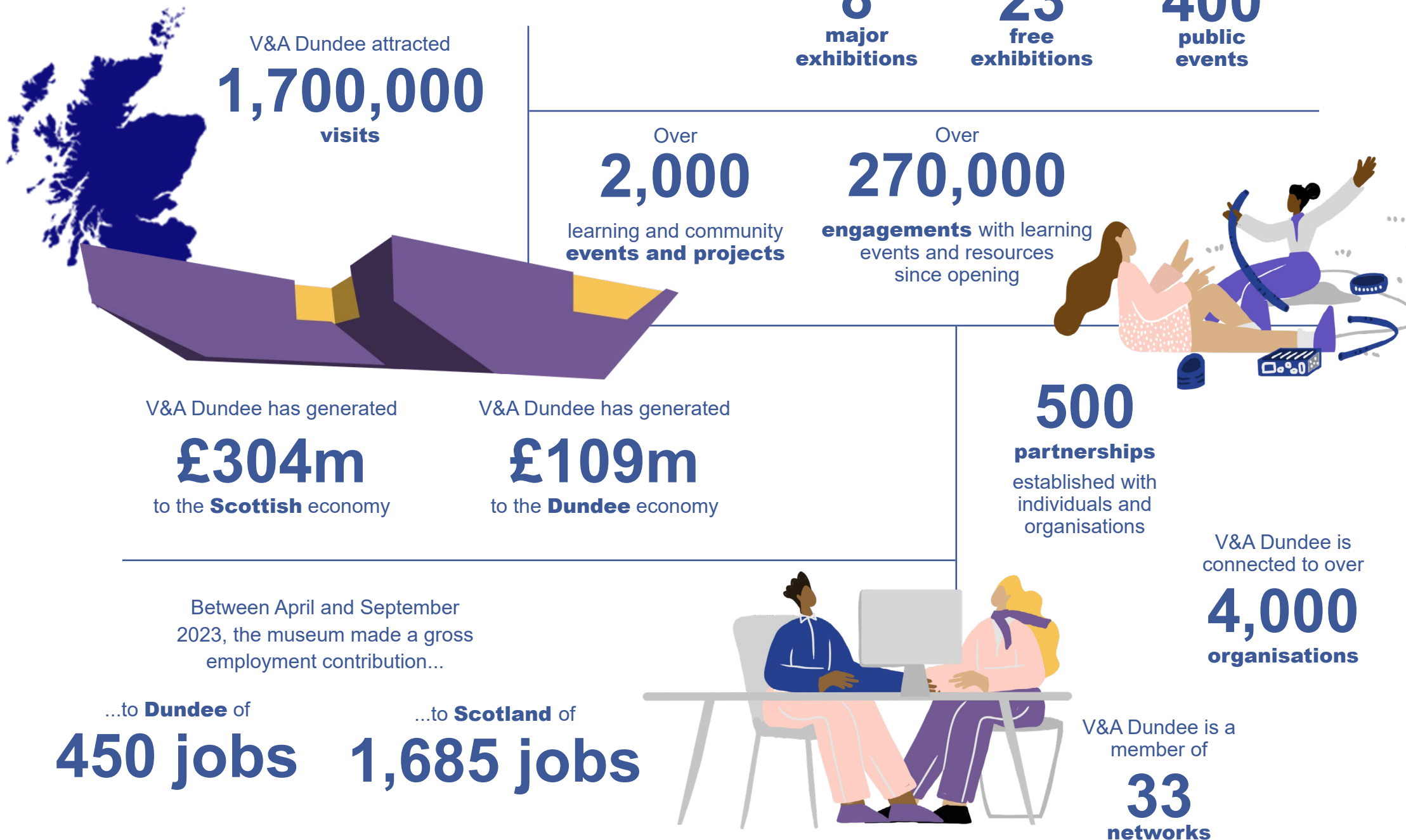


Figure 1: V&A Dundee in numbers



Executive Summary

Executive Summary

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In the last five years V&A Dundee has embedded itself as both a vital cultural institution of Scotland and as a key driver of Dundee's economy. Despite the enormous challenge of a global pandemic V&A Dundee has emerged as a site which draws unprecedented numbers of visitors to the City and it has created high-quality jobs directly, as well as to contractors and to those working in the wider creative economy. Since 2018 V&A Dundee has transformed the waterfront area into an iconic destination to showcase world-class design. It has also reached out beyond its walls to embed itself in the civic life of Scotland. This is just the beginning of V&A Dundee's contribution to Scotland.

Shona Robison, Deputy First Minister and Cabinet Secretary for Finance,
Scottish Government

This is a major moment for V&A Dundee. September 2023 marks the fifth anniversary of its opening in 2018, and five years of operation as Scotland's design museum. This period has seen Dundee build on its rich history with a transformed waterfront and a new iconic building with the city at its heart.

These five years have seen impressive visitor numbers and media coverage for the new museum, as well as the prolonged impact of the Covid-19 pandemic on the people of Dundee and the city's cultural organisations. The success of the major Tartan exhibition in 2023 is a clear indicator that the museum, and wider region, are rebuilding ambition and looking positively to the future, while recognising the significant economic and social challenges that persist.

We are excited to tell V&A Dundee's story. We have chronicled and analysed the impact of these first five years, working closely with this new organisation, consulting widely across its partners and stakeholders, and generating fresh insights on V&A Dundee's impact in Dundee and Scotland.

This transformative impact is arranged around four core themes, as shown in Figure 2.

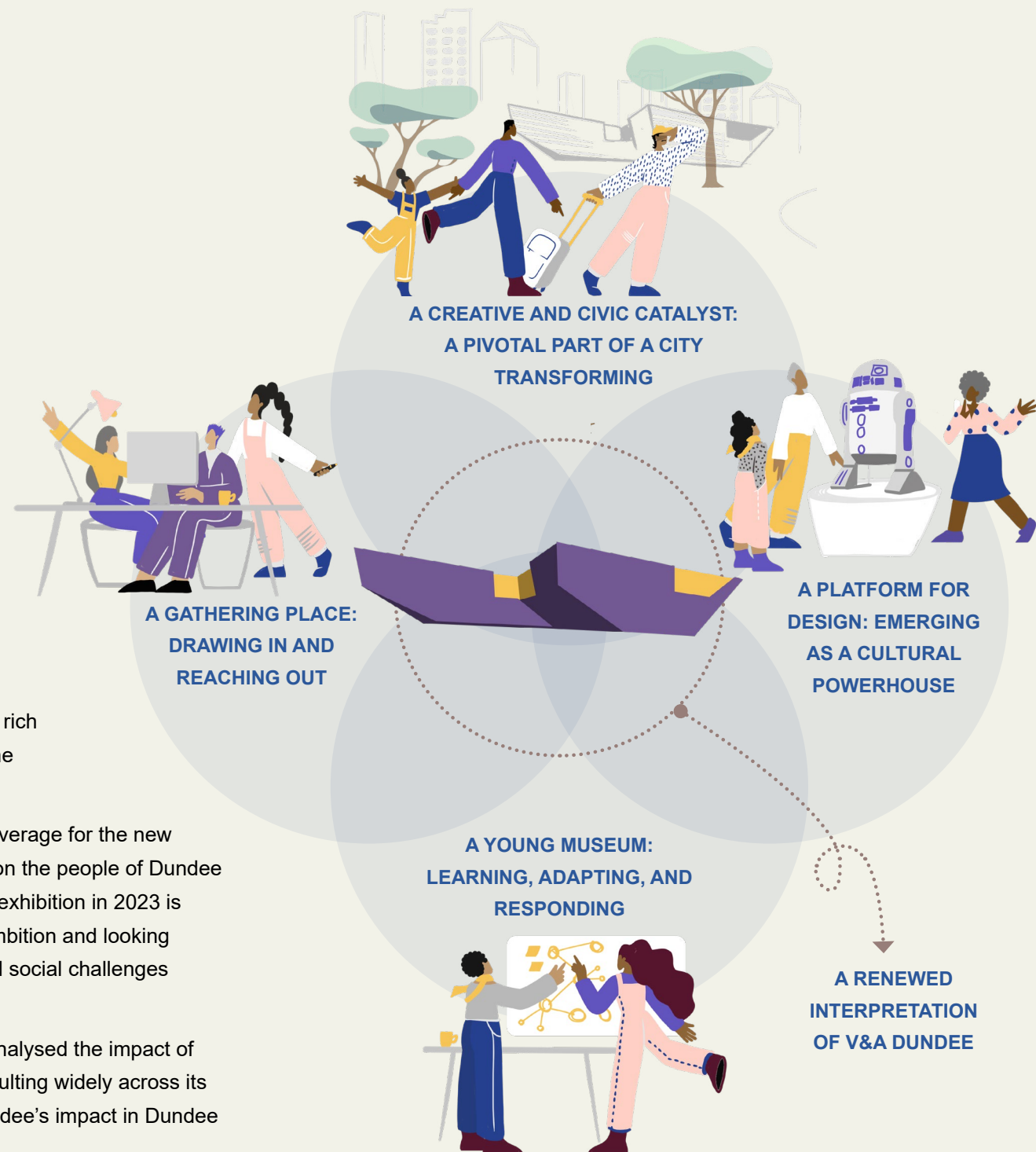


Figure 2: A renewed interpretation of V&A Dundee

A creative and civic catalyst: a pivotal part of a city transforming

V&A Dundee is contributing to Dundee as a unique place to live, work, study and visit - underlining and expanding the value and impact of the city's cultural growth, assets and creative industries.

- In total, V&A Dundee has generated over **£300m (£304m) gross value added (GVA) to the Scottish economy**, including over **£100m (£109m) in Dundee**. This includes the construction and operation of the museum.
- V&A Dundee contributed **£234m of gross GVA impact on Scotland** over its first five years of operation, which corresponds to **£18 of GVA for Scotland for every £1 of funding** by the Scottish Government over this period.
- V&A Dundee has established itself as a **vital cultural voice** as Scotland's design museum and a **new iconic landmark** for Dundee, enhancing the city and region's reputation and identity.
- Many residents indicated in the research consultation carried out that they feel a **strong sense of pride** in V&A Dundee as a building and an organisation, highlighting its contribution to Dundee's reputation and profile.
- V&A Dundee is serving as an **engine for economic development**, drawing people to the region and contributing to local investment. 2018 saw the city welcome 1 million visitors for the first time - a 19% increase on 2017, the year before V&A Dundee opened. Beyond the Covid-19 pandemic, Dundee has built on this step change, with 1.3 million visitors in 2022.

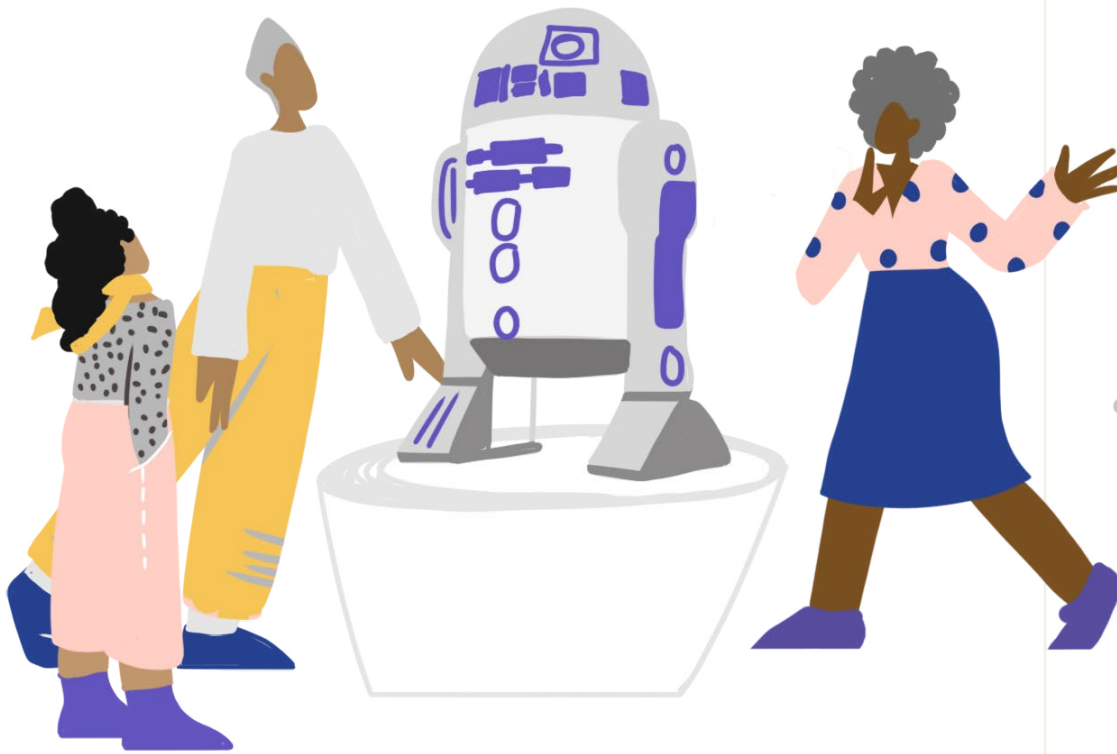
- V&A Dundee has attracted over **1.7 million visits** to the museum in its first five years, despite the impact of the Covid-19 pandemic, including nearly **500,000 people who made their first visit to Dundee** as part of trips to V&A Dundee.
- In the period between April 2023 and September 2023, the museum made a **gross employment contribution to Dundee of 450 jobs and to Scotland of 1,685 jobs**, both on a Full-Time Equivalent basis. These figures are supported by a direct V&A Dundee contribution of 81 jobs. These jobs benefit from V&A Dundee's support for the Scottish Government's Fair Work Framework and from the museum being a Real Living Wage employer.



A platform for design: emerging as a cultural powerhouse

V&A Dundee is emerging as a major cultural voice in Scotland, as well as championing design and designers from Scotland and around the world.

- V&A Dundee is creating **new cultural opportunities**, beyond the central belt, **for audiences** to experience design of **international scale and quality** in Dundee.
- V&A Dundee is recognised as making a **positive impact in the UK's cultural sector** through its programme, research, conferences, and publications, contributing to strategy and policy.
- V&A Dundee is **catalysing new opportunities** for designers, creative communities, and collaborative partnerships.



A gathering place: drawing in and reaching out

V&A Dundee is an organisation with a clear civic outlook. It recognises its role to create opportunities, nurture aspiration and help build communities locally, and further afield.

- V&A Dundee's learning programme has had over **270,000 engagements with events and resources** since opening.
- Since 2018, groups and individuals have participated in more than **2,000 projects and events for schools, families, students, lifelong learners, and communities.**
- As Scotland's design museum, V&A Dundee is acting as **an influential convener bringing people together** to explore how design can help to meet some of the complex problems we face as a society.



A young museum: learning, adapting, and responding

The Covid-19 pandemic significantly disrupted the early years of V&A Dundee and the lives of the city's residents. The museum has experienced two prolonged periods of closure and the ongoing cost-of-living crisis has created a volatile operating environment. However, V&A Dundee is also a learning organisation, open to critical engagement with its audiences and stakeholders, and willing to respond positively. Some further lessons arising in this research include:

- A need to appeal to even broader sections of society, 'opening up' in more ways and truly celebrating the cultural asset it is for Dundee and Scotland.
- Becoming more transparent in its approach to partnership and programme development, recognising the privilege that the V&A brand and associated resourcing brings, while also knowing when to step back and let others lead.
- Collaborating with and supporting design sectors in Dundee and Scotland to better understand and articulate what the potential for being Scotland's design museum truly means in practice for professional development, now and in the future.



Leading to a renewed interpretation of V&A Dundee

Part of being a young museum, within the established V&A museum family with a strong brand, means requiring time to establish an identity. Until this has fully happened, expectations for what V&A Dundee is, and what it is for, will naturally differ across audiences and populations.

This research has shown that the overlapping impact areas can contribute to a renewed interpretation of V&A Dundee. It can *at the same time* be an exceptional museum for locals and visitors alike, a valued civic organisation with diverse communities at its core, a place for professionals to convene, exchange and learn, and an internationally recognised and valued platform for Scottish and international design and culture. Each of these roles adds value to the others. It is in the interweaving of these roles that the true impact of the organisation manifests. There is scope, in future, to further track how these overlapping roles and responsibilities continue to enhance each other, increasing value for the museum and its broad communities of influence.

Already, this influence extends to contributing to all the National Outcomes set by the Scottish Government.¹ One of these National Outcomes relates to Culture: *We are creative and our vibrant and diverse cultures are expressed and enjoyed widely*. But V&A Dundee contributes to National Outcomes far beyond Culture: from Economy (*We have a globally competitive, entrepreneurial, inclusive and sustainable economy*) and Environment (*We value, enjoy, protect and enhance our environment*) to Communities (*We live in communities that are inclusive, empowered, resilient and safe*) and Children and Young People (*We grow up loved, safe and respected so that we realise our full potential*).

Scotland's design museum is a tremendous asset with real local, national, and international reach and relevance. Working with and through its Founding Partners, as well as the many other networks that V&A Dundee participates in and sustains, will enable the museum to strengthen its contribution to these wide-ranging and vital outcomes. The future return on this asset depends, therefore, on the effectiveness of the long-term support from, and collaboration with, these partnerships and networks. **The emerging impacts that the organisation offers to Scotland are vast and it is only just beginning to realise its potential culturally, economically, and socially.**

¹ <https://nationalperformance.gov.scot/national-outcomes>



Background and Context

1.

BACKGROUND AND CONTEXT

1.1 About us

BOP Consulting

BOP Consulting is a global research and consulting practice for culture and the creative economy. We operate around the world to build and support a new cultural and creative economy that prioritises sustainable development and people's wellbeing. BOP Consulting has worked in over 50 countries with clients from international agencies, national and regional government departments, to city leaders and regeneration bodies, individual cultural and creative businesses.

BOP Consulting and tialt worked in partnership on this study, recognising the unique attributes that both organisations bring to the brief.

Tialt – There is an alternative

Tialt is a research organisation specialising in the social impact of arts and cultural organisations and programmes. Based in Dundee and working across the UK and Europe, we develop innovative and inclusive methodologies to unpack the range of outcomes and impacts of cultural engagement and participation on publics, professionals, and organisations.

1.2 Our brief

The report tells the story of V&A Dundee through its impact over its first five years. It outlines the museum's ongoing role as a catalyst for change, contributing to the city of Dundee as well as to regional and national outcomes. The methodology used to achieve this brief is included in Appendix 1 on methodology.

1.3 Context

Past and present

V&A Dundee, Scotland's design museum, has a mission to inspire and empower through design. Designed by architect Kengo Kuma, V&A Dundee is located at the heart of Dundee's reimagined waterfront and is the only V&A museum anywhere in the world outside London.

Since its opening, it has become a highly popular destination, contributing to Dundee's reputation as a creative centre and to the Scottish economy. The museum has not only gained a strong reputation nationally and internationally, but has also become an integral part of Dundee, the UK's only UNESCO City of Design.

Business model

The financial model of V&A Dundee involves support from the Scottish Government, in-kind and direct contributions from the Founding Partners (see more below), fundraising efforts, and self-generated income.

V&A Dundee is run by Design Dundee Limited (which in turn owns a commercial subsidiary Design Dundee Enterprises), a company limited by guarantee and registered Scottish charity. The building occupied by the museum is owned by Dundee City Council under a lease agreement with a maintenance arrangement.

The Scottish Government is V&A Dundee's principal funder and, in 2021, provided support to enhance V&A Dundee's role as Scotland's centre for design and develop its national design remit further.

1.4 Governance and Founding Partners

V&A Dundee operates as an independent charitable organisation under Design Dundee Limited (established in 2010), with a unique and enduring partnership involving five Founding Partners: V&A, Dundee City Council, the University of Dundee, Abertay University and Scottish Enterprise, which continue to provide support and enable the museum's activities.

V&A Dundee is part of the V&A family of sites and is the first of a series of new V&A museums to open across the UK, including Young V&A and V&A East.

The partnership between V&A Dundee and the Founding Partners has played a crucial role in financing, informing, and shaping the organisation. Each one of the partners has made a unique and valuable contribution to the realisation and operation of V&A Dundee and its overall impact on the city and Scotland.

Design Dundee Limited has individual agreements in place with the five Founding Partners. These agreements outline the specific obligations and the benefits that partners receive through their involvement with V&A Dundee.

The organisation is governed by a board of non-executive directors, including the Founding Partners and led by an independent Chair.

We discuss below the relationships between V&A Dundee and each of its Founding Partners. These relationships are integral to V&A Dundee's impact, within the city, across the nation, and as part of a globally recognised brand.

Dundee City Council

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V&A Dundee has made a considerable impact since its launch five years ago for the city and Scotland. It is clearly contributing to delivery of the Council's priorities for the city, creating strong connections with local communities. It has also become a recognisable symbol of the city's ambitions, attracting thousands of visitors each year as well as international attention. All of this has been achieved in the face of the challenges of the pandemic.

Cllr John Alexander, Leader of Dundee City Council

The relationship between Dundee City Council and V&A Dundee is fundamental to achieving the vision and success of the museum, as well as advancing the Council's major 30-year waterfront regeneration plan. The Council took responsibility for the construction of the museum and made a major financial contribution of £6.5m to the capital project, as well as committing to revenue funding and in-kind contributions for 10 years. Dundee City Council played an integral role in helping secure key grants to fund the project, including being the formal applicant to the National Lottery Heritage Fund and Creative Scotland. Additionally, the Council secured Growth Accelerator Funding from the Scottish Futures Trust, including £12.6m specifically for the construction of V&A Dundee.

The Council continues to play a critical role in V&A Dundee as the waterfront regeneration progresses, and in driving the development of culture, tourism, business growth and civic pride across the city.

Dundee City Council funds the full-time position of Schools' Development Officer.

Scottish Enterprise

Scottish Enterprise has played a crucial role in supporting V&A Dundee's concept and feasibility. As a partner since November 2015, Scottish Enterprise has provided £8.5m to the waterfront landscape works as part of a £41.1m overall investment in the Dundee Waterfront project. Moreover, it has provided ongoing advice on various aspects such as the Design and Innovation programme led by V&A Dundee, visitor market appraisal, business planning and funding.

University of Dundee

The idea for V&A Dundee originated in 2007, when the University of Dundee approached V&A in London to explore a potential partnership.² Once concretised, the University of Dundee became a Founding Partner of the museum, signing the Partnership Agreement in December 2014.

To date, the collaboration between V&A Dundee and the University of Dundee encompasses various exhibitions, commissions, publications, internships, and research projects, as well as conferences and events.

V&A Dundee Partnership, a strategic partnership between V&A Dundee and the University of Dundee, is part of Duncan of Jordanstone College of Art & Design's new Centre for Design Exploration. This collaboration is harnessing the potential of the museum as a site of public participation in original design research, as well as a resource and a catalyst for industry and Scotland's creative community.

During the Covid-19 pandemic, V&A Dundee contributed to the University of Dundee's online upskilling courses on Curatorial Practice. The museum provided expertise on curation, gallery management, public programming, marketing and fundraising, and delivered online sessions and museum tours to students. The University of Dundee and V&A Dundee also collaborate on a paid internship programme supported by the museum's Chair Tim Allan. The programme will run over the next three years, with placements being paid the Real Living Wage.

In the realm of learning and community engagement, V&A Dundee and the University of Dundee collaborate on health and well-being projects in partnership with the Schools of Art & Design and Medicine. Furthermore, they work together to organise architecture tours, lectures, and initiatives to combat social isolation as well as setting draft design briefs for students and presenting students' work in the museum.

The University of Dundee funds three full-time positions at V&A Dundee: Head of Design Research, Head of Marketing and Audiences, and a Curator.

Abertay University

Abertay University has been supporting the V&A Dundee project since 2008 and signed a Partnership Agreement with the museum in October 2014. The partnership includes programme support, funding activities, joint events, and the provision of university-funded roles within the museum's teams.

V&A Dundee and Abertay University led the Creative Cluster project supporting the development, design and production of a design innovation toolkit for InGAME (the research and development centre focused on increasing scale and value of the Dundee videogames industry), which was awarded £50k by AHRC - the Arts and Humanities Research Council. In terms of funding activities, the museum is collaborating with Abertay University, Strathclyde University and the University of Dundee for the AHRC Green Transition Ecosystem call funding application.

V&A Dundee actively supports Abertay University's Professional Project, part of the university's game design and computer art courses, where students create a game or interactive design set to a brief from various companies. The museum also supports and hosts various university events, including freshers' events, open days, and graduation celebrations.

Moreover, Abertay University is a delivery partner with the museum and other local partners for UNESCO City of Design Dundee. A member of the university attends the monthly UNESCO Core Group meetings, where partners support the delivery and direction of UNESCO City of Design Dundee projects.

The collaboration further extends to supporting internships and involving students in various programmes. V&A Dundee hosts two full-time Abertay graduates within its Learning team and Audiences and Media team.

² V&A Dundee National Lottery Heritage Fund Final Evaluation Report, August 2019.

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V&A Dundee is an outstanding example of the power of culture and creativity, and the part that it can play in regenerating cities and serving communities with an ambitious and progressive agenda for the future. That V&A Dundee has become such an integral part of the V&A family of sites, and such a vital part of the Scottish cultural and creative landscape, in five short years, is testament to that local leadership and vision.

Tim Reeve, Deputy Director & Chief Operating Officer at V&A family of museums

V&A granted an exclusive 25-year licence for Design Dundee Limited to use the V&A brand and domain name. In addition, the Deputy Director and Chief Operating Officer (COO) of V&A serves on the Design Dundee Limited board.

V&A Dundee is the first V&A museum outside of London. As such, it is an integral part of V&A's UK strategy to broaden connections with audiences, transform access to V&A collections - broadening its creative relevance and social impact, and drive the future of the UK creative economy.

The relationship between V&A and V&A Dundee is built on a strong partnership. V&A Dundee operates independently, with activities and financial results not consolidated within V&A's annual reports. Collaboration between the two institutions is evident through the Scottish Design Galleries, major exhibitions touring from V&A to V&A Dundee including *Ocean Liners: Speed and Style*, *Mary Quant*, and *Videogames: Design/Play/Disrupt*, co-curation on exhibitions and initiatives such as the Upstart Creative Careers Festival and *Plastic: Remaking Our World*³. The two museums also collaborated to create the international online programme for V&A Academy's Upskilling and Professional Development courses.

As a Founding Partner, V&A has also contributed in-kind support, including expert advice, curatorial and conservation support, and access to V&A's collections and teams. It also includes support on the development of V&A Dundee's brand and audience strategies, development of the digital estate, marketing and communications activity, as well as ongoing advice on the commercial offer and retail range.

3 <https://www.vam.ac.uk/festival/2022/upstart-creative-careers-festival-2022>





Creative and Civic Catalyst

2.

A CREATIVE AND CIVIC CATALYST: A PIVOTAL PART OF A CITY TRANSFORMING

V&A Dundee is contributing to Dundee as a unique place to live, work, study and visit - underlining and expanding the value and impact of the city's cultural growth, assets and creative industries

- In total, V&A Dundee has generated over **£300m (£304m) gross value added (GVA) to the Scottish economy**, including over **£100m (£109m) in Dundee**. This includes the construction and operation of the museum.
- V&A Dundee contributed **£234m of gross GVA impact on Scotland** over its first five years of operation, which corresponds to **£18 of GVA for Scotland for every £1 of funding** by the Scottish Government over this period.
- V&A Dundee has established itself as a **vital cultural voice** as Scotland's design museum and a **new iconic landmark** for Dundee, enhancing the city and region's reputation and identity.
- Many residents indicated in the research consultation carried out that they feel a **strong sense of pride** in V&A Dundee as a building and an organisation, highlighting its contribution to Dundee's reputation and profile.
- V&A Dundee is serving as an **engine for economic development**, drawing people to the region and contributing to local investment. 2018 saw the city welcome 1 million visitors for the first time with the museum opening in September of that year - a 19% increase on visitors to the city compared with 2017, the year before V&A Dundee opened. Beyond the Covid-19 pandemic, Dundee has built on this step change, with 1.3 million visitors in 2022.
- V&A Dundee has attracted over **1.7 million visits** to the museum in its first five years, despite the impact of the Covid-19 pandemic, including nearly **500,000 people who made their first visit to Dundee** as part of trips to V&A Dundee.
- In the period between April 2023 and September 2023, the museum made a **gross employment contribution to Dundee of 450 jobs and to Scotland of 1,685 jobs**, both on a Full-Time Equivalent basis. These figures are supported by a direct V&A Dundee contribution of 81 jobs. These jobs benefit from V&A Dundee's support for the Scottish Government's Fair Work Framework and from the museum being a Real Living Wage employer.
- Further employment is sustained by contractors and suppliers to V&A Dundee, including opportunities for freelancers operating in the creative economy, as well as through spending by visitors to V&A Dundee in the wider economy and increased expenditure along associated supply chains.

2.1 Growing Economic Impact

“ Paris has its Pompidou, Bilbao its Guggenheim and now, at last, Dundee has its V&A.

Scottish Daily Mail, 13 September 2018

Strong economic impact from construction and V&A Dundee's first year of operation

Bringing an institution that has been compared to international institutions such as the Pompidou and the Guggenheim to Dundee benefitted the city and country economically even before V&A Dundee opened. The construction of V&A Dundee over 3.5 years generated £35.8m of Gross Value Added (GVA)⁴ for Dundee and £70.4m for Scotland, according to the independent financial evidence and research published in January 2020.⁵

“Based on visitor survey evidence, V&A Dundee's success in attracting visitors has translated to strong economic impacts,” summarised this research, which assessed the first year of V&A Dundee's operation (September 2018 to September 2019). The analysis found that V&A Dundee generated gross impact on Scotland of £75.4m over the first year of operation.

“This is primarily driven by the higher than forecast visitor numbers to the museum.” The data on visits to V&A Dundee over its year of operation supports this conclusion:

- 280,000 people visited within two-and-a-half months of opening: almost the total visitor target for the financial year of 2018/19.
- Sustaining this strong initial performance enabled V&A Dundee to welcome over 830,000 visitors during its first year of operation.
- This was considerably more than the forecast of 440,000 visitors over this period (which was a different 12-month period from the financial year of 2018/19).

⁴ GVA is a measure of the value of goods and services produced in an area, industry, sector, or organisation within an economy. It reflects contribution to Gross Domestic Product (GDP), which is a measure of the value of the whole economy. It equates to the gains from trade (profits and wages) and reflects the revenue value of this trade minus non-labour costs.

⁵ Ekosgen, V&A Dundee Economic Impact Assessment Year 1 Impacts for V&A Dundee, (January 2020). Available at: <https://www.vam.ac.uk/dundee/info/policies>



Covid-19 challenges after first year of V&A Dundee

The spectacular number of visits to V&A Dundee over its first year of operation was assisted by the novelty factor of having such a high-profile brand and celebrated building in Dundee. It was not expected that V&A Dundee would sustain this rate of visits in the period after this novelty had subsided. Estimates for visits in the 2020/21 financial year were in the region of 360,000.⁶

Unfortunately, the Covid-19 pandemic massively curtailed visits to V&A Dundee and prevented impact on this scale being achieved. Research into 19 cultural organisations in Dundee gives an indication of the impact of the pandemic:⁷

- In the 2019/20 financial year, nearly 700 jobs were reported across these cultural organisations. In the 2020/21 financial year, the total jobs reported fell by 21% to nearly 550.
- The reduction in employment includes only a small reduction (-4%) of employees, reflecting the use of the job-retention scheme (furlough). Freelance/contract staff reduced at a higher rate than employees (-34%).
- 447 volunteers and 35,653 hours of volunteering were recorded in 2019/20. Volunteering was heavily reduced in 2020/21, with a -56% reduction in volunteers and -48% reduction in recorded volunteer hours.
- 2019/20 saw over 1.7 million visits to venue-based organisations, highlighting significant activity and engagement prior to the pandemic. Between 2019/20 and 2020/21, reported visits to venues reduced by 91%.

⁶ V&A Museum of Design Dundee - Visitor Forecasts 2019-2023 report by ScotInform, published 2017

⁷ England, L. (2021) Dundee Cultural Recovery: a policy report. King's College London. DOI: <https://doi.org/10.18742/pub01-068>

The cultural and creative industries - in the UK and globally - were particularly hard hit by Covid-19. The very existence of large parts of the sector was threatened, depending as they do on human congregation and on an ecosystem of freelance creatives and small businesses. The fundraising work of the Dundee Cultural Recovery Fund, supported by V&A Dundee, as well as additional funder support, helped some from the local sector through this crisis.

Other sectors that depend on human congregation (e.g., hospitality) also faced tremendous challenges during this period. The pandemic had a significant impact on both employment and total output from the Scottish hospitality sector: a loss of 85% of output between February and May 2020, and a 23% loss in the number of jobs across the sector between March and December 2020.⁸ This collapse in output caused the closure of hospitality venues in Dundee.⁹

The loss of these venues diminished the visitor offer of Dundee. Recovery was further challenged by the cost-of-living crisis, reducing disposable income to spend on culture and hospitality. In Spring 2023, seven in 10 people in Scotland had cut back on one or more essential spendings over the last six months, according to research by the Joseph Rowntree Foundation.¹⁰ This means that they were cutting back spending on food, heating and for some, skipping meals. Of course, these terrible circumstances severely curtail the ability of Scottish households to spend on trips to cultural and hospitality venues.

⁸ These figures are based upon research published by the University of Aberdeen: <https://www.abdn.ac.uk/news/16981/>

⁹ On 23 March, The Courier reported on 9 venues in Tayside and Fife that closed over this period: <https://www.thecourier.co.uk/fp/lifestyle/food-drink/3127832/tayside-fife-pandemic-hospitality-closures/>

¹⁰ <https://www.jrf.org.uk/blog/10-cold-hard-facts-low-income-scottish-families-grow-weary-after-another-winter-cost-living>

Significant economic impact over first five years

The economic impact of V&A Dundee over its first five years of operation is impressive - despite the many challenges of these years associated with Covid-19 and the cost-of-living crisis.

V&A Dundee contributed over £230m of gross GVA impact on Scotland over its first five years of operation, as shown in Figure 3. GVA (Gross Value Added) is an economic productivity metric that measures the contribution of a company to an economy, producer, sector or region. These figures are based on updating inputs to the model published in January 2020, through updated visitor surveys¹¹ and information on the financial footprint of V&A Dundee.¹² In line with these information sources, the gross economic impacts shown in Figure 3 come from two channels:

1. Spending by visitors on trips to V&A Dundee (visitor economy),
2. Spending by V&A Dundee on suppliers and workers.

£198m of the £234m contribution to GVA across Scotland (85%) comes via the visitor economy channel. Drawing visitors to Dundee from outside Scotland is important to the economic contribution of V&A Dundee. Visitors from overseas spend over £500 per person in Scotland on trips that involve visits to the museum. The beneficiaries of this spending extend far beyond V&A Dundee: accommodation, hospitality, other attractions. 25% of visitors to V&A Dundee over its first five years came from outside Scotland, with the spending of these visitors being crucial drivers of the visitor economies of Dundee, Tay City Region and Scotland.

This £234m of GVA to Scotland over the first five years of operation by V&A Dundee **corresponds to £18 of GVA for Scotland for every £1 of funding by the Scottish Government** over this period.

As noted above, the construction of V&A Dundee over 3.5 years generated £35.8m of GVA for Dundee and £70.4m for Scotland. **This means that in combination with the figures in Figure 3, V&A Dundee has generated gross GVA for Dundee of £109m and £304m for Scotland over its first 8.5 years - 3.5 years of construction and five years of operation.**

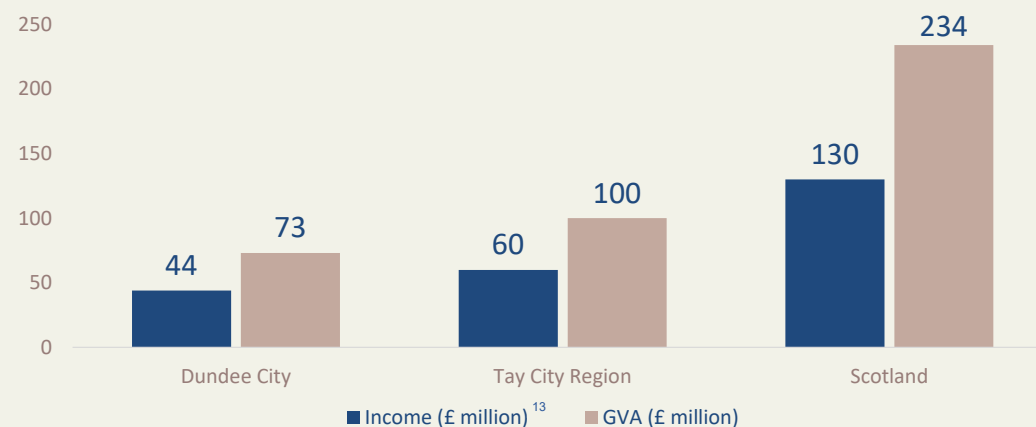


Figure 3: Total (direct, indirect and induced) gross economic impacts, Dundee, Tay Cities Region and Scotland - on-site and off-site - September 2018 to September 2023

¹¹ Provided by ScotInform - the visitor survey partners of V&A Dundee.

¹² We worked with the finance team at V&A Dundee to update and organise these financial data.

¹³ Income is wages paid due to the two channels of impact that contribute to this model: 1. Spending by visitors on trips to V&A Dundee, 2. Spending by V&A Dundee on suppliers and workers

Robust employment impact - including being a Real Living Wage employer

The employment contribution of V&A Dundee has fluctuated over its first five years - with Covid-19 massively impacting the capacity of the museum to sustain employment in the wider visitor economy. Nor can we cumulatively assess employment over these five years, in the way that we present income and GVA results in Figure 3.¹⁴

In the period between April and September 2023, the museum made a **gross employment contribution to Dundee of 450 jobs and to Scotland of 1,685 jobs**, both on a Full-Time Equivalent basis. These figures are composed of:

- **Direct employment by V&A Dundee:** Contributing 81 jobs to the city and the country. These jobs benefit from V&A Dundee's support for the Scottish Government's Fair Work Framework and from the museum being a Real Living Wage employer.
- **Employment by contractors and suppliers to V&A Dundee:** This adds a further 59 jobs in Dundee and 67 in total across Scotland.
- **Wider employment in the visitor economy:** This adds 310 jobs in Dundee and 1,538 in total across Scotland. This significant employment contribution underlines the ability of V&A Dundee to encourage broader economic impact and further investment. These jobs include roles in the wider tourism, culture and hospitality sectors, such as hotels, restaurants, shops and cultural venues.

¹⁴ The same person fulfilling the same role from year-to-year does not add to the stock of employment, while the wages of this person cumulatively contribute to the stock of GVA across these years.

Broader economic impact - encouraging further investment

Spending by visitors to V&A Dundee in the city helps to sustain the viability of other attractions and amenities, though Dundee like many towns and cities is experiencing significant ongoing challenges. In addition, as we discuss below, the presence of V&A Dundee has improved perceptions of Dundee, which also encourages further investment. The regeneration of the waterfront around V&A Dundee has instigated five new hotels, an upgraded train station, new restaurants, and Social Security Scotland's HQ. Dundee is also now working towards Eden Project coming to Dundee in the coming years.

CASE STUDY: EDEN PROJECT DUNDEE

The Eden Project is an educational charity and social enterprise. It is famous for transforming a china clay pit in Cornwall into a living theatre of plants and people. This visitor destination showcases humanity's dependence on plants and the regeneration of landscapes and livelihoods.

Similarly, the former gasworks on East Dock Street in Dundee is to be transformed into the Eden Project Dundee. The project is working with two of V&A Dundee's Founding Partners (Dundee City Council, University of Dundee) and will contribute to the cluster of visitor destination and knowledge assets in Dundee, which V&A Dundee is a key part of.

“ We are attracted to Dundee's knowledge cluster. The presence of V&A Dundee, alongside some excellent educational institutions, will make it easier for us to fulfil our mission. We look forward to collaborating with V&A Dundee.

Blair Parkin, Chief Experience Development Officer, Eden Project

2.2 A new icon for Dundee - a 21st century city

“ *The building is an iconic emblem of the city. It has such strong recognition.*

Caroline Warburton, VisitScotland

Supporting Dundee's waterfront transformation

The Dundee City Plan was published by the City Council last year and, “*aims to provide a comprehensive overview of the current state of the city of Dundee and its strategic priorities for the next decade*”. It describes “*a growing city on a journey of major economic, social and cultural development, including its world renowned £1bn waterfront development with V&A Dundee at its heart.*”

The updated economic impact figures that we report above demonstrate that V&A Dundee is fulfilling this central role within the city's economic development plans.

In doing so, the museum is contributing to a central part of the vision within the City Plan. This is for the city to “*have a strong, smart and sustainable city economy with jobs and opportunities for all*”. The economic contribution of V&A Dundee is:

- **Strong:** Successfully recovering from the Covid-19 pandemic and delivering economic growth across its first five years of operation.
- **Smart:** Built upon highly specialised and skilled practices within the museum and dissemination of knowledge and learning from it.
- **Environmentally sustainable:** Based in a cutting-edge building, occupied by an organisation committed to its own decarbonisation and supporting others to achieve this (see more in Section 3).

Improving perceptions of Dundee

“ *The V&A Dundee has been a success and the building itself has become one of Scotland's most emblematic and instantly recognisable jewels. Dundonians deserved their museum and over time this building and its treasures will evolve uniquely to honour them.*

Kevin McKenna, The Observer, 6 October 2019

The role of V&A Dundee in improving perceptions of Dundee is reflected in the media coverage of the city over the first five years of V&A Dundee:

- Before opening, V&A Dundee was expected to have a transformative impact on the city, changing its reputation, becoming its centre of gravity, and redefining Dundee internationally.¹⁵
- After opening, the museum started to be seen as a catalyst for positive change, boosting the city's confidence, forging a new path, and transforming Dundee for residents, workers, and visitors.¹⁶
- Since, media outlets have reported that the presence of V&A Dundee has changed perceptions, brought about increased tourism and significant economic benefits to the city.¹⁷

In addition to this widespread media coverage on the launch of V&A Dundee and its programme since, V&A Dundee has also helped to enhance perceptions of Dundee through:

¹⁵ For example: The Scotsman, “Will Scots finally discover Dundee?”, 22nd of January 2018.

¹⁶ For example: Evening Telegraph, “V&A is listening to people”, 14th of February 2023; Daily Record, “How V&A Museum made an impact on the city: V&A Changed my life”, 13th of September 2018.

¹⁷ For example: The Sunday Times, “Dundee's skyline is changing rapidly”, 15th of March 2020.

- **Portrayal of Dundee on screen:** "Dundee" is the eighth episode of the second season of HBO's global hit satirical comedy-drama television series **Succession**. Aired on the 29 September 2019, the episode was filmed in Dundee and some scenes take place in the then newly-opened V&A Dundee. The production received backing from Screen Scotland for filming portions of "Dundee" and has been seen by millions worldwide.
- **Corporate Partnerships:** For over 180 years, **The Dalmore** has created some of the world's most exceptional single malts. In 2020, The Dalmore and V&A Dundee entered a long-term partnership which has been promoted to The Dalmore's international markets. Two years in the making, the Luminary Series was unveiled in 2022 - a limited-edition collection of whiskies conceived by leaders from the worlds of whisky and architectural design, including V&A Dundee architect Kengo Kuma. The Luminary No. 1 was a highly successful release - with the edition changing hands for twice the price on the secondary market within weeks of the launch.
- **Helping to bring major cultural events to Dundee:** The prestigious **Art Night** visual arts festival held its first event outside London in Dundee due to the city's vibrant cultural scene and strong social history. On the evening of 24 June 2023, Art Night presented ten major commissions by internationally significant and emerging artists in civic and public spaces across Dundee. Art Night was brought to Dundee via a collaborative creative partnership led by Dundee Contemporary Arts (DCA) with support from V&A Dundee and other venues.

Driving design and innovation

The economic role of V&A Dundee for the city is partly about tourism ("*after the opening of V&A Dundee*", the City Plan describes "*a tourist destination for Scottish, UK and international visitors*") and innovation - with the City Plan celebrating Dundee as, "*one of the top 'places of the future' in a report examining how new technologies will create new jobs*".

The status of Dundee as a future and innovation focused city is driven by the critical mix of the city's universities, college, creative industries including games, cybersecurity and technology businesses and organisations alongside the wider arts, culture and heritage sectors. This was encouraged when the UK announced Dundee as one of four bases across the UK for CoSTAR, a new research and development facility to help drive the next generation of visual effects technologies in the UK's film, TV and performing arts industries. The focus of CoSTAR on innovation is complementary to V&A Dundee and the broader ambitions of the city to be a pioneering place of new ideas.

"*Design*," according to the Scottish Government when announcing V&A Dundee as Scotland's centre for design, "*is central to Scotland's ambitions to be greener, fairer and more equal, supporting innovation across sectors, developing critical, curious and inquiring minds, and addressing complex challenges*." Our updated economic impact figures do not account for the contribution of V&A Dundee to economic growth through innovation, as such growth arises over a longer-term and through more complex processes than tourist-driven economic growth.

It is important that both the tourist- and innovation-driven contributions of V&A Dundee to the long-term growth of Dundee are recognised, supported, and backed by consistent and ambitious strategies. As a central feature of the transformation of the Dundee waterfront, which benefits from a masterplan running from 2001 to 2031, V&A Dundee has always been positioned within long-term and ambitious economic plans. This ambition should not dim over the remaining phases of the waterfront transformation and all aspects of V&A Dundee's economic contributions should be built into subsequent iterations of economic development plans.

2.3 Building Visitor Satisfaction and Local Pride

“ V&A Dundee has improved the psychology of Dundee and given us a belief that change is possible.

David Thomson, Director at DC Thomson & Co Ltd

A healthy mix of visitors

The figure 4 shows that 35% of visitors to V&A Dundee over its first five years came from Dundee or the wider Tay Cities region. Differences of opinion towards the museum remain and can be the topic of local debate online and from visitor feedback, however there is evidence that the museum has grown a strong local following and that many local people are backing the museum with time and engagement. There are, of course, residents in the city who have not visited the museum and residents who don't consider the museum to be for them - consistent with the experience of many other museums in other places. V&A Dundee is working to increase its relevance and is making steps, in response to feedback, to change its programme and ticketing, by increasing the free offer and enabling access to major exhibitions to be free for 18-year-olds and under.

V&A Dundee, in addition, is an important destination for Scottish residents from beyond the Tay Cities region - with 39% of visitors to V&A Dundee over its first five years travelling from these parts of Scotland.

Over the same period, 25% of visitors came from outside Scotland - showing that V&A Dundee is also attracting visitors from long distances from the city. The Tartan exhibition now at V&A Dundee is sponsored by LNER, underlining the significance of V&A Dundee for the UK East Coast Main Line and is also supported by VisitScotland promotional activity to drive visitors to the city.

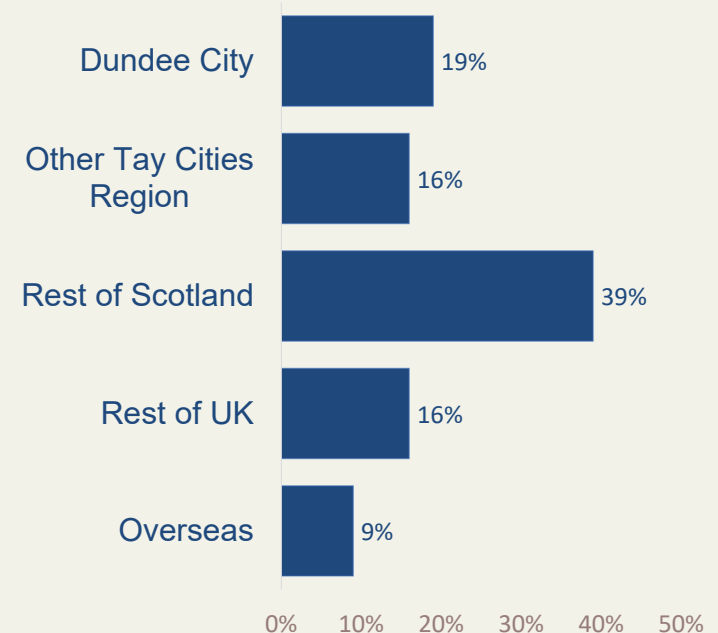


Figure 4: Proportion of visitors to V&A Dundee by place of residence (September 2018 to September 2023)

Source: BOP Consulting calculations using data gathered by ScotInform for V&A Dundee (September 2018 to September 2023; the April to September period represents a forecast)

Positive visitor satisfaction

The figure 5 shows that overall, V&A Dundee has received high levels of visitor satisfaction throughout its first five years. An ongoing programme of visitor research has identified areas of strength as well as areas for further development.

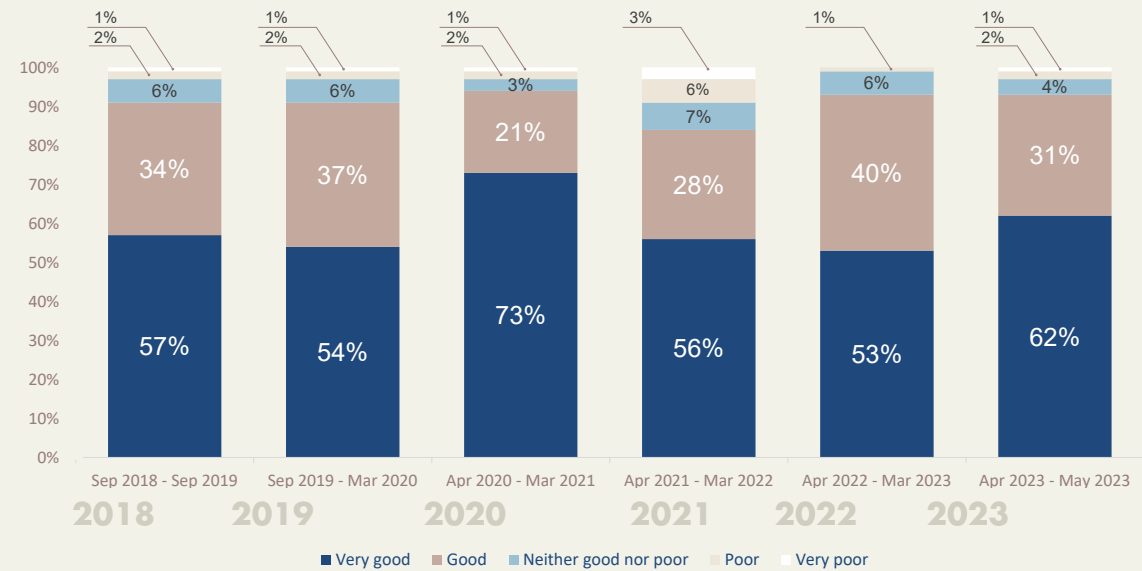


Figure 5: Satisfaction of visitors to V&A Dundee by time period

Source: Scotinform for V&A Dundee (2018 to 2023)

All the exhibitions at V&A Dundee have recorded high levels of visitor satisfaction, as shown in the figure, with all exhibitions having at least four out of five (80%) of attendees reporting their experience as 'good' or 'very good'.

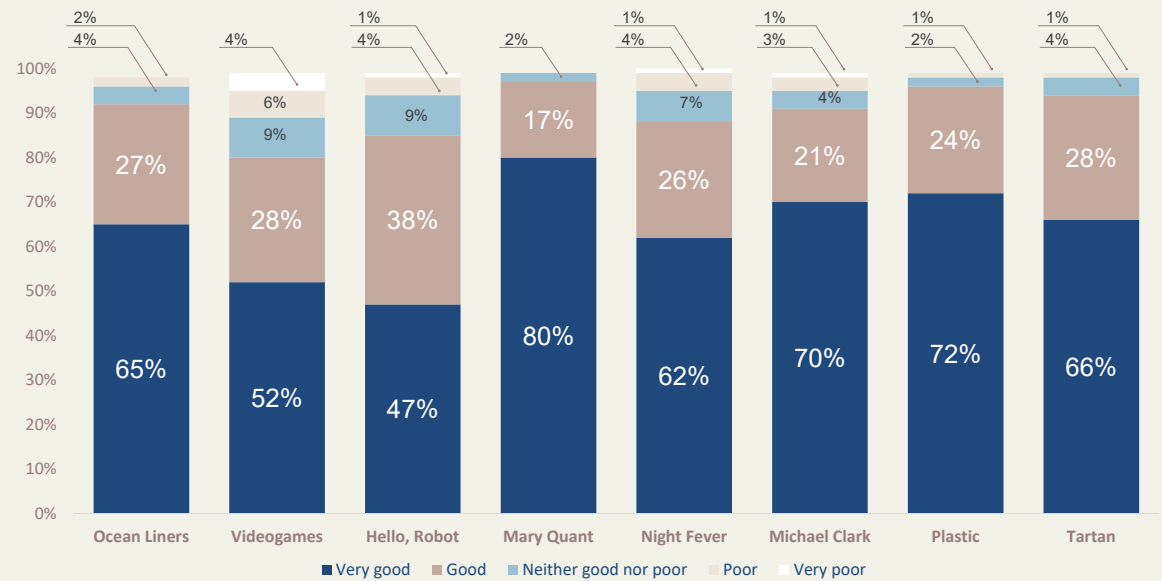


Figure 6: Visitor satisfaction with V&A Dundee exhibitions

Source: Scotinform for V&A Dundee (2018 to 2023)

Adding texture to visitor surveys

As part of this evaluation, tialt conducted additional audience research with 150 people in the museum, including those visiting the Tartan exhibition, attending the Scottish Design Galleries, on arranged visits as part of the learning programme, and others with a curiosity to explore the building or just to visit the café. An exercise we called “feeling tartan” generated responses to the questions ‘How do you feel about V&A Dundee’ and ‘How does V&A Dundee make you feel?’. Responses are shown in figure 7.

There was a broad mix of visitors, including people visiting for the first time, regulars, locals, tourists, and international visitors. Almost all spoke highly about their experiences of visiting. Some came just to use the café, to read, or to meet friends.

People felt positive when in the building, with a lot of discussions about it being a calming place that encourages wellbeing and sparks creativity. However, opinions were more mixed when discussing the use of space. The large space was either considered valuable and soothing, or too empty, indicating a tension between whether spaciousness was good or bad, often based on personal taste. These findings are also reflected in feedback on other platforms including Google Reviews, TripAdvisor, and V&A Dundee’s regular feedback surveys.

The museum has taken steps to mitigate some regular comments including increasing the amount of design that can be seen for free, showing more design projects originating from Dundee, adding more activities for children and making changes to the catering and retail offer. There is the potential to make further changes based on visitor feedback, and some of the challenges may be further mitigated by plans to increase the interpretation around the architectural experience and developing more exhibitions and displays that can be seen for free.

How do you feel about V&A Dundee?

- Calm: the building is reflective of the water, and it feels like a calming presence
- Looking to the future: future-facing building and space
- Proud of Dundee
- Safe and social - a space to be together
- Accessible (e.g., for D/deaf audiences)
- Interested, inquisitive - the outside brought me in
- Dundee is better for having it - rejuvenated the waterfront

How does V&A Dundee make you feel?

- Calm, relaxed, soothed
- Inspired, interested, excited
- Curious
- Happy, bright
- Stimulated
- Room to roam and rest
- Nostalgic
- Creative

Figure 7: Summary of responses to V&A Dundee

Source: tialt (2023)

2.3.1 Attracting and sustaining visits to Dundee

“ V&A Dundee has added to the brand of Dundee.
It has augmented our brand as a cool city.

Jackie McKenzie, Director of External and Corporate Relations at Abertay University

Attracting visitors to Dundee for the first time

Over the first five years of V&A Dundee, there have been 1.7 million visits to the museum as a whole and nearly 500,000 people made their first visit to Dundee as part of trips to V&A Dundee, as shown in Figure 8.

The figure shows the proportion of visitors to V&A Dundee who made their first trip to the city during its different phases of operation - the museum has consistently been attracting new visitors to the city throughout its first 5 years.

Driving a step change in visits to Dundee - sustained after Covid-19

As seen in the figure and reflecting its ability to draw visitors to Dundee for the first time, though of course other factors are also at play to draw people to the city.

- **V&A Dundee drove a step change in the number of visitors to Dundee:**
The number of visitors to Dundee was broadly consistent between 2011 and 2017 - averaging just over 800,000 per year. After V&A Dundee opened, visitors increased to the city by 19% between 2017 and 2018, with 1 million people visiting in 2018 and over 1.2 million visiting in 2019.
- **Dundee is recovering pre-Covid-19 numbers of visits:** 2022 saw 1.25 million visits to Dundee - the highest number yet and an increase on the initial step change experienced in 2018 and 2019. In 2022, the ScotInform data further shows that the demographic profile of visitors has also returned to the 2019 profile, in terms of local, national, and international visitors.

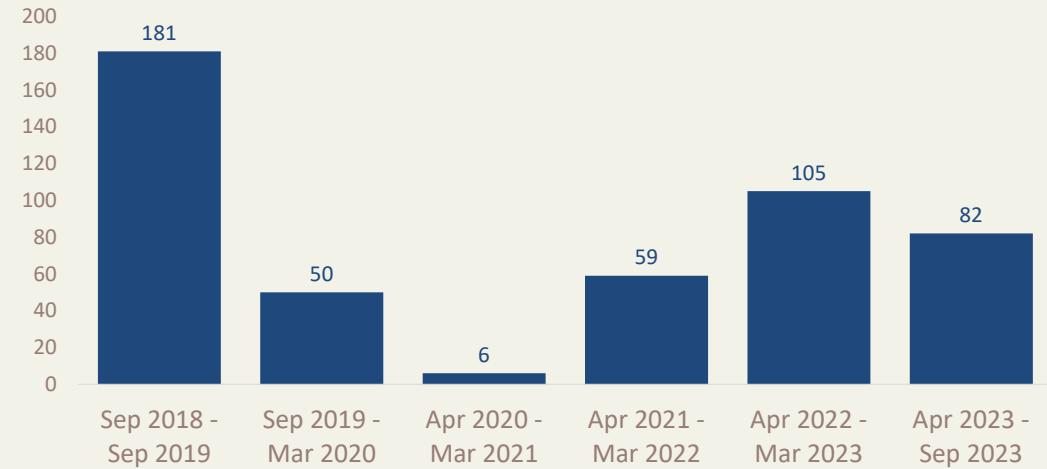


Figure 8: Number of V&A Dundee visitors making their first trip to Dundee by time period (000s)

Source: BOP Consulting calculations using data gathered by ScotInform for V&A Dundee (2018 to 2023). The April to September 2023 period represents a forecast.

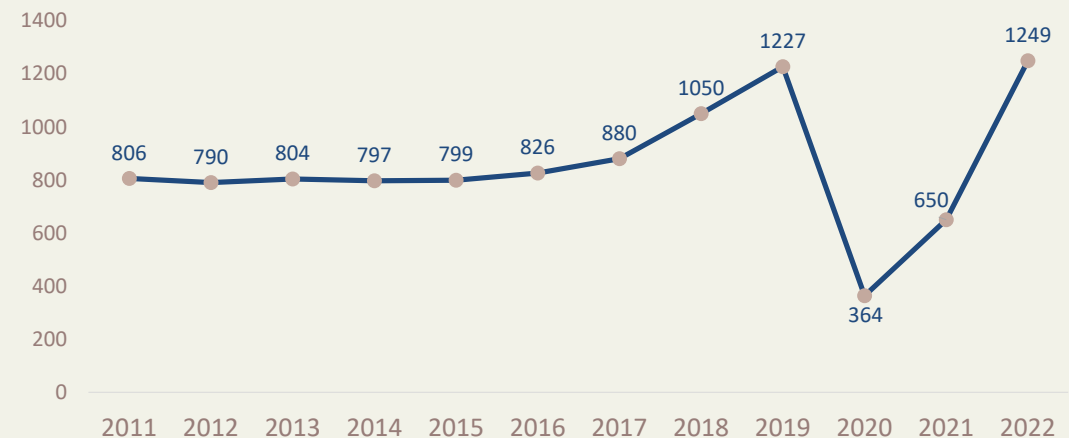


Figure 9: Number of visitors to Dundee (2011 to 2022, 000s)

Source: Scottish Tourism Economic Activity Monitor (STEAM) (2011-2022), published August 2023

2.4 A Platform for Design: emerging as a cultural powerhouse

V&A Dundee is emerging as a major cultural voice in Scotland, as well as championing design and designers from Scotland and around the world.

- V&A Dundee is creating **new cultural opportunities**, beyond the central belt, **for audiences** to experience design of **international scale** and quality in Dundee.
- V&A Dundee is recognised as making a **positive impact in the UK's cultural sector** through its programme, research, conferences, and publications, contributing to strategy and policy.
- V&A Dundee is **catalysing new opportunities for designers, creative communities, and collaborative partnerships** in Scotland, the UK and internationally.

Being Scotland's design museum

V&A Dundee has been engineered to showcase and promote historical and contemporary design, from and for Scotland. The building has a floor area of 8,445 square metres and includes a main hall, learning centre, auditorium, exhibition galleries and the permanent Scottish Design Galleries. V&A Dundee has the largest museum-standard temporary exhibition space in Scotland, at 1,100 square metres, in addition to the Scottish Design Galleries at 550 square metres. Its mission is to inspire and empower through design, with a charitable remit to:

- Advance the arts, heritage, culture and science
- Advance education and research
- Advance citizenship and community development

International scale and quality

“As the University provides 15% of the population in Dundee, there is a sense that V&A Dundee provides a context for studying in Scotland for international students: it represents Scottish culture but at the same time international culture.

Professor Anita Taylor, University of Dundee

The size and museum-standard environmental conditions of the main galleries, added to the strength of the V&A brand, means the museum is able to secure loans of objects from around the world. The resources, in-house curatorial expertise and a strong network of relationships allow V&A Dundee to undertake research and develop its own exhibitions as well as host touring exhibitions on a scale that are unlikely to be shown elsewhere in Scotland, attracting significant numbers of visitors to the region specifically for the programme.

Since opening, V&A Dundee has curated, hosted, and staged 8 major ticketed exhibitions, an additional 23 free exhibitions and displays, alongside nearly 400 public events. The programme team includes staff working on the Scottish Design Galleries, exhibitions and displays of varied scale, public programmes, research, design and innovation, learning and community programmes and seeks to cross-fertilise the knowledge and experience held in the organisation. This enables coherence across the organisation's activities and ensures that full value is obtained from its role as Scotland's design museum.

“There is something really powerful there about V&A Dundee's role within the city, but not just the city, nationally, and as part of the bigger global conversation about design, people and communities. It's really important for us that Scotland continues to innovate and do astonishing things. V&A Dundee is definitely there as part of that.

Norah Campbell, Head of Arts, Scotland, British Council

CASE STUDY: TARTAN

- The Tartan exhibition (1 April 2023 - 14 January 2024) is the first major exhibition fully initiated and curated by V&A Dundee, working with consultant curator Professor Jonathan Faiers. The exhibition aimed to take a radical new look at tartan and explore tartan's universal and enduring appeal with examples of fashion, architecture, graphic and product design, photography, furniture, glass and ceramics, film, performance, and art.
- The focus on one of Scotland's most famous designs, the quality and breadth of curation, the objects on display, plus a strong communications strategy made Tartan the most successful exhibition at V&A Dundee since the opening exhibition Ocean Liners and is demonstrating a strong recovery for the museum post-pandemic.
- The wide appeal of the exhibition has resulted in increased visitor numbers, a boost to membership sales, and improved visitor feedback. Between April and August 2023, the exhibition had attracted nearly 45,000 visitors with another 4 months yet to run. 45% of visitors were from the Tayside region and 55% had travelled from the rest of Scotland, across the wider UK or lived abroad. 3,000 school children had visited the exhibition in its first four months and a further 4,000 people aged 18 or under had seen the exhibition for free.
- Outcomes for visitors included a greater understanding of how the pattern has been made and developed, the myths and stories around tartan, how it is integral to Gaelic culture as well as being a global textile, and how tartan has inspired creativity. The majority of visitors felt that the exhibition made them think differently about tartan and that it showed new research on the subject.
- The curatorial team secured loans from collections across the UK as well as North America, Europe and Asia, notably the Philadelphia Museum of Art and Manhattan Tartan Project. The V&A brand has been influential in including loans of objects by internationally recognised brands such as Chanel, Dior, Vivienne Westwood and McQueen as well as loans from Tate, V&A, National Museums of Scotland, National Trust for Scotland, National Theatre of Scotland, The Royal Collection, Fashion Museum Bath, and the Highland Folk Museum.
- A collaboration between V&A Dundee, National Museums Scotland and the Scottish Tartans Authority has led to presenting the world's oldest known surviving specimen of true tartan in Scotland.
- With over 300 objects and over 100 loans, the current Tartan exhibition shows what is possible by being Scotland's design museum: these numbers are significant in the context of temporary exhibition making and ambitious in the broadest of contexts compared to museums across the globe.

“ I really enjoyed the variety of exhibits and displays, how tartan is made and can be used. I loved the influence of tartan globally and also seeing the historical impact tartan has made and how its legacy has endured. I liked the media recordings around Gaelic people and the pride that Scots hold around their identity.

Tartan visitor, ScotInform visitor survey



Making a positive impact in the cultural sector

There is evidence that the curatorial and programme team at V&A Dundee have made significant strides within the short lifespan of the museum to have research impact across the sector. Without a collection to draw from, securing loans is a critical part of programme delivery. Beyond the multitude of relationships nurtured to secure loans, there is also a steady contribution to research and curatorial practice by way of participation in conferences, contribution to public talks and events outwith the museum, authorship of articles, and publications and media interaction across podcasts and interviews.

All programming is underpinned by curatorial research, and this includes incoming tours which are often augmented to ensure the content resonates as impactfully as possible with visitors to V&A Dundee (e.g., a section on Scottish nightclubs within Night Fever: Designing Club Culture). Research outputs are captured in a variety of ways that reflect the resource available and audience appetites. The following examples represent a cross-section of how research and associated outputs have had a positive impact on the cultural sector across Scotland, the UK and beyond:

- Together with Vitra Design Museum, V&A South Kensington and MAAT, Lisbon, V&A Dundee co-produced the major exhibition - *Plastic: Remaking Our World*. Beyond the exhibition, the outcomes of the project included a major publication and a series of international conferences, including *Synthetic Histories: Plastics, Climate and Colonialism* hosted by V&A Dundee in collaboration with the Paul Mellon Centre for Studies in British Art.
- In 2022 the free exhibition *Sincerely, Valentines - From Postcards to Greetings Cards* ran for more than 10 months and celebrated the history of Dundee design success story, printers Valentine & Sons. The exhibition was a research partnership between V&A Dundee, the University of St Andrews and Glasgow-based curatorial practice Panel. The exhibition included memories gathered by previous employees to create a living archive.

- Together with Creative Scotland, British Council Scotland, National Galleries Scotland, Architecture & Design Scotland and the Scottish Government, V&A Dundee forms part of the strategic partnership that delivers Scotland + Venice, promoting contemporary art and architecture from Scotland on the world stage at La Biennale di Venezia. In 2021, V&A Dundee hosted Scotland + Venice following its presentation at the Biennale. *What if...?/ Scotland* sought to re-engage the civic role of design professionals by asking communities from across Scotland to share their hopes and dreams for the future of the places they call home.

This all contributes to the cultural and creative growth of Dundee and Scotland, creating value and opportunities for audiences and the design and culture sectors at scale. It builds on the work already being done by many across the city and Scotland, in turn, boosting the city's appeal to those working in the creative and cultural industries to live and work in Dundee, as well as prospective university and college students.

Uniquely, V&A Dundee is developing a role in influencing strategic support for design nationally, having been commissioned by Creative Scotland to lead research into the potential of strategic support for design: *Design for Scotland*. V&A Dundee also leads a Design and Innovation programme that brings design thinking into businesses, public and third sectors to unlock innovation. In 2021 the Design Council staged its inaugural Design for Planet conference at V&A Dundee, bringing in-person and online audiences together to discuss design's critical role in leading a response to climate change.

And as the UK's first and only UNESCO City of Design, a designation awarded to reflect Dundee as a city rich in design heritage, with thriving creative industries and huge potential, V&A Dundee hosts the UNESCO City of Design team on behalf of its partners.

V&A Dundee as a confident symbol of design excellence can only serve to complement the existing energy in the city, across Scotland, and beyond.



Serving a creative community locally and nationally

In the past five years, V&A Dundee has also established itself as a creative marketplace in Dundee, providing a platform for designers through retail, design markets, fashion shows and programme. A renewed focus on product development and partnerships has seen a range of designers, makers and manufacturers collaborate with V&A Dundee on exclusive retail merchandise. Overall, the designers and makers consulted for this report have expressed appreciation for the collaborative and supportive approach of V&A Dundee, which has had a positive impact on their businesses. Evidence of benefits reported includes increased sales and profile, new social media followers, and enhanced brand awareness.

The relationship development over time has provided a platform for designers and makers to develop unique designs, participate in exhibitions and events, and gain recognition and opportunities beyond their collaboration with V&A Dundee. The improved retail environment is an increasingly important way that V&A Dundee can champion design in a sustainable way, as well as improving the overall visitor experience and generating income.

CASE STUDY: JO-AMI

Jo-AMI is a Dundee-based knitwear designer who has created several ranges of knitted items for V&A Dundee. V&A Dundee commissioned Jolene Guthrie, founder of Jo-AMI, to explore and reinterpret the concept of tartan, resulting in a range of knitted accessories and garments, including socks, tote bags, and a gilet. The socks have sold exceptionally well. From April 2021 to June 2023, V&A Dundee sold 337 items by Jo-AMI.

“ *My relationship with the V&A has been extremely valuable to myself and Jo-AMI, as it has allowed my brand to reach international customers through the tourists that visit the museum. It has allowed me to develop designs from my core range of products to create unique pieces and create exclusive ranges.*

Jolene Guthrie



CASE STUDY: KERRIE ALDO

Kerrie Aldo was commissioned to design and construct limited editions of the Dundee Raincoats over a span of three years, using remnant fabric from Dundee based textile mill Halley Stevensons. The Dundee Raincoats have played a significant role in defining the brand DNA and promoting the Dundee story. The recent endorsement by Greg James, a radio DJ, wearing one of the red raincoats generated hundreds of new followers for Kerrie Aldo. From April 2021 to June 2023, V&A Dundee sold 83 of the designer's items.

“Partnering with a design museum and a textile factory to design the ultimate contemporary raincoat has been a brilliant experience.”¹⁸

Kerrie Aldo

¹⁸ <https://www.vam.ac.uk/dundee/info/museum-maker-and-manufacturer-unite-to-create-the-dundee-raincoat>



2.5 A Gathering Place: drawing in and reaching out

V&A Dundee is an organisation with a clear civic outlook. It recognises its role to create opportunities, nurture aspiration and help build communities locally, and further afield.

- V&A Dundee's learning programme has had over **270,000 engagements with events and resources** since opening.
- Since 2018, groups and individuals have participated in more than **2,000 projects and events for schools, families, students, lifelong learners, and communities**.
- As Scotland's design museum, V&A Dundee is acting as **an influential convenor, bringing people together** to explore how design can help to meet some of the complex problems we face as a society.

An iterative learning programme, responsive to its local and national communities

V&A Dundee's learning programme has evolved over the past five years due to a range of factors, most notably the pivot from outreach projects pre-opening to a post-opening model mainly in the museum, then a substantial pivot to digital during the pandemic with a steady return to pre-pandemic participation levels since.

This is due, in part, to how the organisation has continued to nurture its existing relationships as well as make time to develop new ones. There have been over 270,000 engagements with the learning programme since opening, and groups and individuals have participated in more than 2,000 projects and events for schools, families, students, lifelong learners, and communities. The organisation has opened its learning studios as free, drop-in community spaces for a wide range of partners and individuals to use as they want. The learning programme is central to delivering V&A Dundee's mission of inspiring and empowering through design, in reaching people who are less likely to visit the museum on an independent visit and is a core source of income for the organisation supported by a range of high-profile funders who recognise the strength of its impacts.

Key strands of the learning programme include:

— Young People's Collective (YPC)

Involved in learning projects and co-designing the organisation's programme, YPC are a group of 14-24 year-olds who meet regularly at V&A Dundee and have been developing and growing their influence since before opening. With two ex-members now on the Board and two employed in full-time posts, their voices are actively influencing the direction of the museum in an authentic way.

— Families Programme

A dynamic programme helping families to access the museum, engage with design, and connect with families across the city, some of this work is targeted to benefit those likely to require additional access support via partnerships, such as Families Outside and Teapot Trust amongst others.

— Creative Ageing and Wellbeing

A programme of local community engagement with a focus on working with a range of partners predominantly looking to reduce social isolation, loneliness, encourage creative ageing and help to increase mental health and wellbeing.

— Teacher Secondment Programme

The Teacher Secondment Programme has worked with four teachers from across Dundee City Council Secondary and Primary schools since 2014, enabling teachers to be based full-time in the museum for between one and two academic years. The seconded teacher actively develops the schools programme with teachers and the programme has engaged with almost 10,000 pupils, teachers and educators since opening. This has included working directly with Education Scotland and a range of other strategic stakeholders and policy makers to devise innovative ways of enhancing the city and nation's educational opportunities in line with the Curriculum for Excellence.

“ *I thought it would be about being an ‘educator at V&A Dundee’ but it actually became something much bigger than that. It completely changed my perspective on what design is and what it is for. Designing curriculum is now a top priority for me, understanding people’s different backgrounds and points of view, and how public services need to be adapted to this and mindful of it. It’s a much bigger social goal than designing a schools’ programme and I didn’t necessarily expect that.* ”

Christopher Lewis - Teacher of Pedagogy, Dundee City Council, and Schools
Development Officer secondee 2019-2022

These programmes are demonstrating a range of emerging impacts for the organisation and its stakeholders, including:

— Deepening relationships with place and people

V&A Dundee deliberately partners with organisations working with more marginalised communities who can regularly use and benefit from the museum's facilities. This is enabling stronger relationships to be built on all sides in more incremental and sustainable ways. Examples include Alzheimer Scotland, Dundee Women's Aid, NHS Tayside, Dundee Carers Centre, Community Link Workers, amongst others.

— Learning about design and shifting perceptions

V&A Dundee is achieving scale across its learning programme with regular engagement from schools across Dundee and Scotland. Beyond this, it is working strategically with education policy makers to enable design-based approaches to enhance the curriculum.

“ *The programmes have tapped into different areas of the curriculum and offered cross-curricular learning opportunities. This has allowed teachers to incorporate the museum's resources in creative ways. The challenges and programmes for young people have given them skills, knowledge and opportunities to see how design relates to their lives. This has helped raise the profile of the museum in a positive way and will likely have a lasting impact.*

Jenni Mackay - Education Support Officer, Digital Learning and Technologies,
Dundee City Council

— Large-scale socially focused interventions

Increasingly V&A Dundee is targeting its learning programme on enabling positive social change. A recent example is the 'Beach Plastic Challenge' as part of the *Plastic: Remaking Our World* exhibition (2022). This initiative supported schools from Eigg, Mull, Aberdeenshire, East Lothian, Highlands and Islands, Dundee, Angus, Edinburgh, South Ayrshire, Argyll and Bute and Inverclyde to visit their local beaches, gather plastic and discuss and explore the implications. The results were exhibited as part of the *Plastic* exhibition in the museum.

— Providing young people with training and employment opportunities

As the learning programme matures, it is increasingly clear that there are pathways into permanent and freelance employment with the museum and its partners, particularly for participants engaging over the longer term (e.g., the Young People's Collective). An innovative new three-year paid internship programme is supporting University of Dundee design students to work on bespoke projects of mutual value across the organisation.

“ *The collective has given me so much. Experience, friends, connections... the list goes on. It's connected me to a community I never expected I would initially fit in with and has supported me in many ways.*

YPC member

Building networks and partnerships for greater impact

Over the past five years, V&A Dundee has been a member of 33 networks.¹⁹ At present, it is an active member of 24 of these networks, of which five were created by V&A Dundee. Through these, V&A Dundee is connected to over 4,000 organisations. The networks cover a wide range of thematic areas related to V&A Dundee's work, including arts, culture and heritage networks, marketing, tourism and city development networks, learning & education, design, community support, research and others. This breadth demonstrates the many ways in which V&A Dundee teams are actively engaged in collaborating outside of the organisation.

V&A Dundee also works in a collaborative manner by engaging with individuals and organisations across projects. Since 2012, the organisation has worked with almost 500 partners, with more than half of these since 2020.

A strong example of the catalysing power of V&A Dundee was its support to the fundraising effort for the Dundee Cultural Recovery Fund, a £1million fund for Dundee cultural organisations in response to the Covid-19 pandemic. V&A Dundee offered back-office support and drew on its extensive contacts and supporters to raise funds that were then shared equally with five at-risk cultural organisations across the city.

V&A Dundee is increasingly exploring what the opportunities and limitations of the museum are across its networks and partnerships, seeking to clarify where it can lead to maximise impact, and where it can play more of a supporting role.

¹⁹ Understood here as a group of organisations that exchange and collaborate for a joint purpose.





A Young Museum: Learning, Adapting and Responding

3.

A YOUNG MUSEUM: LEARNING, ADAPTING AND RESPONDING

The Covid-19 pandemic significantly disrupted the early years of V&A Dundee and the lives of the city's residents. The museum has experienced two prolonged periods of closure and the ongoing cost-of-living crisis has created a volatile operating environment. However, V&A Dundee is also a learning organisation, open to critical engagement with its audiences and stakeholders, and willing to respond positively. Some further lessons arising in this research include:

- Learnings over the first five years of V&A Dundee have seen improvements made to visitor experience, accessibility, and sustainability.
- Learning is an ongoing process, with our consultation suggesting potential for further gains around opening-up, transparency, and collaboration.
- Both the publication of a new V&A Dundee Business Plan and revised approaches to evaluation and monitoring have the potential to embed and augment these learnings



3.1 Learning from the first five years

“

*V&A Dundee has come out of the pandemic with Tartan.
The museum is full and really found its groove.
This follows a lot of testing and learning how to operate.*

Professor Anita Taylor, University of Dundee

V&A Dundee has established itself as a young museum that is learning, adapting, and responsive to its context. With ongoing efforts to enhance the visitor experience, listen to feedback, and foster partnerships with other cultural organisations, V&A Dundee continues to evolve.

Achievements of V&A Dundee, recognised in consultation for this research, include:

- Building visitor numbers back as markets recover.
- Successfully putting on major exhibitions with cultural, economic and social value, without this feeling jarring to visitors.
- Operating at the intersection of design, history, futures, and digital, maximising the cultural value of investment in major exhibitions.
- Incorporating learning projects into exhibitions and developing innovative learning resources, through a cross-organisational approach.
- Curating in a more decolonised and inclusive way, working in consultation with institutions, academics advisors and groups such as Transnational Scotland and LGBTQ+ communities to challenge assumptions about Scottish design history by bringing in broader perspectives. A workshop in April 2022 brought together academics and community groups from Scotland's LGBTQ+ communities resulting in new research and interpretation called 'Lavender Labels' which explored LGBTQ+ connections through objects in the Scottish Design Galleries.

- Many great conversations were had as part of the 'feeling tartan' consultation discussed above around the content of V&A Dundee exhibits, including many separate highly positive comments on the inclusion of the political side to the collections and links to dismantling colonialism.

These are challenging roles to execute. V&A Dundee has learnt how to better fulfil them over its first five years. The evolution of the museum's approach to exhibitions and learning programmes has involved learning how to more effectively navigate such challenges.

Visitor experience

The museum has listened to visitor feedback and improved the visitor experience by generating more free activities that animate the architecture and plaza: adding architecture tours, animating the ground floor hall, adapting the catering and retail offer and revising its pricing policy. As a result, the team is praised for their flexibility, responsiveness, and openness to co-design with those they are serving.²⁰

Many of those that were consulted during the 'feeling tartan' consultation expressed a desire for more soft and comfy furnishings to be able to relax on, and there were mixed feelings when discussing the use of space in the building, - suggesting scope to further improve visitor experience.

²⁰ This point was emphasised both by those interviewed for this research and the media. See for example: Evening Telegraph, "V&A is listening to people", 14th of February 2023.

Accessibility

“ Recently, the Royal Scottish National Orchestra came to Dundee for a performance. So, us and V&A Dundee came together to talk about how this could be made accessible to people with dementia. They are actively trying to be more aware of different people, needs and expectations.

Jeni Sinclair, Alzheimer Scotland

V&A Dundee has adapted to improve access to design for individuals with diverse support needs. Initiatives such as the Sensory Friendly Days allowing access to exhibitions outside usual opening hours and with a range of modifications and dementia-friendly events, demonstrate the institution's dedication to creating an inclusive environment.

Partnerships with organisations like Families Outside and Alzheimer Scotland have extended V&A Dundee's reach to communities across the country, ensuring that more people can benefit from its offerings.²¹ The museum has made many ongoing approaches to engage various community groups who may not spontaneously engage, fostering a "culture of care" with partners and participants. The museum acknowledges it has more to do to make the building and programme more accessible.

²¹ This point was emphasised both by interviewees and the media. See for example: The National, "Sensory Friendly Days to come to V&A to boost accessibility", 26th of September 2021; Dundee Evening Telegraph, "V&A hosts dementia group", 19th of August 2021; Evening Telegraph, "New app designed to help sight-loss visitors enjoy V&A exhibits", 11th of March 2022.

Environmental sustainability

“ Tackling climate change requires us to find imaginative solutions to complex problems. Cultural buildings and events can provide an open and welcoming space for these challenging conversations, bringing people together to collectively think, imagine, feel and develop lasting connections that will strengthen future climate action.

Ben Twist, Director of Creative Carbon Scotland

V&A Dundee is changing the way it operates to act on a Decarbonisation Plan and Sustainable Programme Model, developed in partnership with sustainability experts Julie's Bicycle.

This learning from V&A Dundee aims to go beyond changing its own operations. It has also sought to provide reflection, inspiration, and knowledge for others to improve sustainability. These efforts have included:

- Membership of Scottish National Culture for Climate (SNaCC), a working group initiated by Creative Carbon Scotland, that acts to maximise the contribution of cultural organisations to decarbonisation.
- Hosting the Design Council's Design for Planet festival during COP26 - the United Nations Climate Change Conference in Glasgow. This aimed to galvanise the UK's design industry toward a sustainable, climate-first future.

3.2 Improving the museum

The museum's flexibility, responsiveness, and collaborative approach was noted by those we consulted for this research. Some themes emerged from these discussions in relation to how the museum could further improve. The recent publication of an update to V&A Dundee's vision for the next five years offers an opportunity to seize on these improvements.

Opening-up

A need to appeal to even broader sections of society, 'opening up' in more ways and truly celebrating the cultural asset it is for Dundee and Scotland.

V&A Dundee should continue to adapt and meet the needs of residents and visitors while considering its role in the broader vision for Dundee's future, beyond acting as a local cultural partner, but as a resource for the city that can contribute to city wide ambitions and strategies.

Views expressed in our consultation include:

- The organisation is better at inviting specific individuals and groups in, rather than being seen as having its doors, and site more broadly, 'open to all'.
- Communications could be improved around its partnership work at local, national, and international levels. Interviewees emphasised the importance of clearly defining and enacting a "culture of collaboration" across the different levels at which V&A Dundee operate.



Transparency

Becoming more transparent in its approach to partnership and programme development, recognising the privilege that the brand and the resourcing brings, while knowing when to step back and let others lead.

There is an appetite for greater clarity on what it means in practice to be Scotland's design museum. This might entail clarifying pathways for engagement, specifying responsibilities and roles across sectors, and articulating the practical implications of this designation. Some interviewees expressed the need for a clearer articulation of how V&A Dundee supports Dundee's UNESCO City of Design designation and a longer-term strategy for this.

Collaboration

Collaborating with partners in Dundee, Scotland and further afield to better understand and articulate what the potential for being Scotland's design museum truly means in practice, now and in the future.

Some interviewees felt that V&A Dundee at times could feel 'closed off' from the networks and collaborations taking place across and beyond the city. To foster a holistic cultural ecosystem in Dundee, it is important for V&A Dundee to complement other cultural assets in the city. The Covid fundraising effort known as the Dundee Cultural Recovery Fund led by V&A Dundee to raise money for five cultural organisations in Dundee during the pandemic serves as a successful example of partnership working in this regard, but the view was expressed that more could be done through such partnership working. It was suggested, for example, that a more joined-up approach to learning and engagement with other cultural organisations in Dundee would be beneficial.

During the 'feeling tartan' and Young People's Collective consultations, younger audiences (16-25yrs) expressed a desire for more evening activities, (e.g., music, film etc.) and for V&A Dundee to be a more 'active' space in the sense that they would use it to socialise in hours that suited them. Such activities might offer another means of collaborating with other cultural organisations.

Equally, it is important to recognise that V&A Dundee is part of the city's growth but not the sole solution to its challenges. There should be realistic expectations set on all sides about the opportunities and limitations of what the museum can do for and with the city.

Nonetheless, these opportunities extend to contributing to all the National Outcomes set by the Scottish Government.²² One of these National Outcomes relates to Culture: *We are creative and our vibrant and diverse cultures are expressed and enjoyed widely*. But V&A Dundee contributes to National Outcomes far beyond Culture: from Economy (*We have a globally competitive, entrepreneurial, inclusive and sustainable economy*) and Environment (*We value, enjoy, protect and enhance our environment*) to Communities (*We live in communities that are inclusive, empowered, resilient and safe*) and Children and Young People (*We grow up loved, safe and respected so that we realise our full potential*).

Contributing to such a wide range of National Outcomes is testament to V&A Dundee's status as a national asset. Being Scotland's design museum means finding the right forms of collaboration both with local, cultural partners and with others internationally that can help strengthen the contribution of V&A Dundee to these National Outcomes and to global understanding of Scottish design.

²² <https://nationalperformance.gov.scot/national-outcomes>

3.3 Tracking future impact through monitoring and evaluation

The museum's impact is currently tracked mainly by visitor numbers, satisfaction, verbatims and origin. As V&A Dundee continues to learn how to best generate impact across a wide range of areas, there is a case for broadening and adapting how monitoring and evaluation is done. This might involve the outcomes being achieved with community participants, visitor experience, impact on partners, and the impact on designers (locally and further afield) in more qualitative and rounded ways.

Improvements to monitoring and measuring these effects by V&A Dundee could strengthen how it communicates and promotes its social impact and build more confidence and pride in its work. Starting with 2024, V&A Dundee will develop a model to evaluate social impact through learning and community programmes in the city and beyond.

Based on this research, some suggestions include:

- Regularly tracking partnerships being established and what mutual value these produce. This could include ongoing maintenance of the 'partner and network tracker' created for this research and regular reflection sessions with key partners exploring the value of the relationships.
- Updating approaches to audience and participant feedback to include more creative and reflective methods, potentially using qualitative data (as per the 'Feeling tartan' presented above), to delve deeper into perceptions and experiences beyond a 'feedback survey' approach.
- Extending the design-led practices embedded in the sector and business support programmes to capture feedback and reflections on the value of participation - immediately after interventions, as well as over time (e.g., six months later).

- Regularly reviewing these sources of evidence in a cross-departmental working group to explore how learning from different sources and functions of the organisation can inform others and developing a clearer overarching impact narrative.
- Maintaining demographic data on visitors to the museum and participants of V&A Dundee programmes.

In addition, we note some features of our economic impact modelling. The gross economic impacts reported in Chapter 2 come from two channels: 1. Spending by visitors on trips to V&A Dundee, 2. Spending by V&A Dundee on suppliers and workers. These figures are gross in that they do not apply an additionality analysis to quantify what proportion of this visitor spend would occur in Dundee in the absence of V&A Dundee. It was not possible to apply an additionality analysis, as visitor surveying focused on these questions was not undertaken over most of the first five years of V&A Dundee.

Incorporating such surveying is one way in which measurement of the museum's economic impact could become more refined. Another would be to capture the contribution of V&A Dundee to economic growth through innovation, such as improvements in innovation by participants in the Design and Innovation programme, or social return on investment in health and wellbeing programmes. This is a distinct channel of economic impact from those assessed within our gross economic impact model. Such economic impact, however, arises over a longer-term and through more complex processes than tourist-driven economic growth.

4

Pupils from Ss Peter and Paul RC Primary School with Yinka Ilori at the opening of his installation, Listening to Joy, December 2021
© Michael McGurk



Appendix

4.

APPENDIX 1: METHODOLOGY

Our approach for the social and economic impact evaluation of V&A Dundee has been design-led, following the Design Council's Double Diamond's stages. The principles of a design-led methodology aim to prioritise the needs of individuals, foster inclusive communication, encourage collaboration, and continuously refine ideas and solutions based on feedback and testing. The methodology involves a combination of interviews, surveys, data analysis, and qualitative research to assess both the social and economic impact of V&A Dundee.

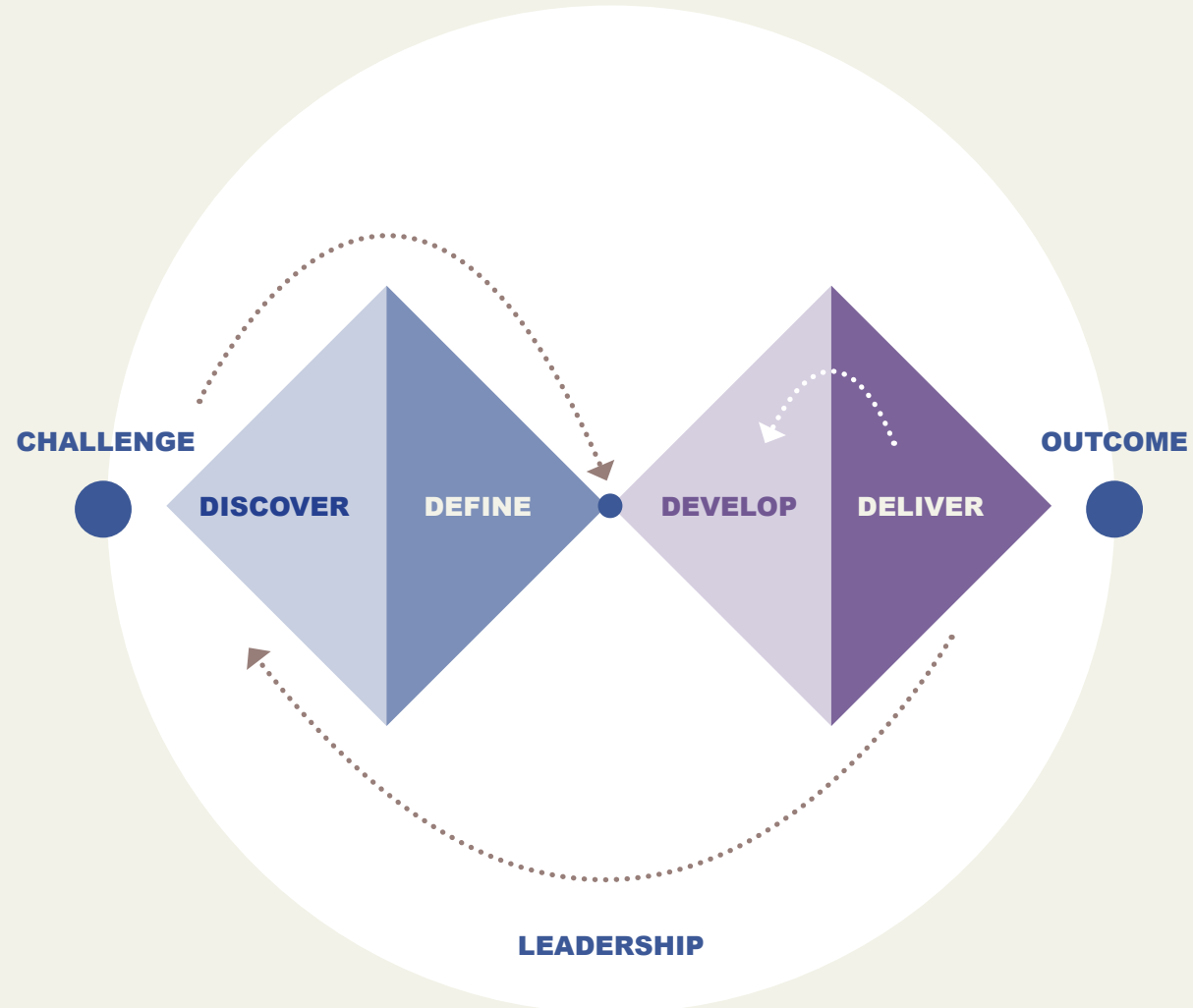


Figure 10: Double Diamond

• DISCOVER

In the discovery phase of our project, our aim was to refine and finalise our methods and build insight from consultation.

- **External stakeholder consultations:** We conducted external stakeholder consultations through interviews with Founding Partners and key organisations (please see 6.2 for a full list of consultees).
- **Internal consultations:** We conducted consultations with V&A staff and volunteers through interactive workshops.

As a result of the discovery stage, we documented our findings and data on an accessible online platform for collaborative exploration, we refined and finalised our work plan, and we formulated the impact areas that form the basis of this report.

• DEFINE

In the second stage of the research, we undertook desk research grounded in the tasks developed in the work plan, as well as continued our extensive programme of consultations.

- **Consultations** with community partners, SMEs, freelancers, designers, Design and Innovation programme participants, Dundee City Council teacher secondments, Young People's Collective, local cultural organisations, creatives and designers.
- **Onsite creative consultation with visitors** - two days of fieldwork onsite talking to visitors about their experiences and perceptions, attendance at the English for Speakers of Other Languages café.
- **Economic impact modelling over five years:** Working V&A Dundee (organisation) and ScotInform (audience insight) to update organisation and audience inputs to economic impact model built after the first year of V&A Dundee²³ and extend this model over 5 years.

- **Media coverage analysis:** We conducted a thematic analysis of V&A Dundee's key media mentions in the past five years.
- **Document review of key strategic literature:** We reviewed key strategic literature at local, regional and national level.
- **Comparators research:** We researched four comparators agreed with V&A Dundee (one for each impact area).
- **Record of partnerships and networks:** We developed a template record of partnerships and networks with precise parameters that we shared with V&A Dundee for completion by different teams and departments.
- **Mapping of programme development:** Exploring the rationale behind programme development with the curatorial and learning teams

• DEVELOP

In the third phase, we brought together all of our data and started developing the social and economic impact narrative.

- **Economic modelling and narrative:** We quantified the direct and indirect contributions of V&A Dundee to the local, regional and national economy. Going beyond numbers, we developed a holistic economic narrative.
- **Social impact modelling and narrative:** We quantified the number of partnerships, networks, projects and participants engaged and built upon these with the extensive qualitative data gathered in previous stages exploring perceptions of V&A Dundee's impact on different stakeholder groups.
- **'In focus' case studies:** For each of the impact areas we have provided additional context on 'in focus' case studies identified as representing the range of themes that were found in the broad qualitative consultation.

• DELIVER

In the final phase of our project, we developed the final outputs that tell V&A Dundee's story of the past five years.

²³ Ekosgen, V&A Dundee Economic Impact Assessment Year 1 Impacts for V&A Dundee, (January 2020)

4.1 List of consultees

- Aileen Lamb - Scottish Enterprise
- Anita Taylor - The University of Dundee
- Annie Marrs - V&A Dundee/UNESCO City of Design Dundee lead
- Attendees of the Dundee City Council English for Speakers of Other Languages Conversation Café
- Audrey May - Dundee City Council
- Beth Bate - Dundee Contemporary Arts
- Blair Parkin - Eden Project
- Blair Thomson - Northwood Trust
- Caroline Warburton - Visit Scotland
- Charis Fraser - Dundee Women's Aid
- Chris Lewis - Ex-Teacher Secondment participant
- Claire Stewart - Families Outside
- David Thomson - DC Thomson
- Fatima Ramzan - Aspiring Women
- Gary Jamieson - Current Teacher Secondment participant
- Gillian Easson - Creative Dundee
- Jackie McKenzie - Abertay University
- Jeni Sinclair - Alzheimer Scotland
- Jenni Mackay - Dundee City Council
- Jenni McKechnie - Dundee Women's Aid
- Jenny Watson - Scottish Government
- Norah Campbell - British Council
- Robin Presswood - Dundee City Council
- Rory Young - Dundee City Council
- Rosemary Moncur - Alzheimer Scotland
- Tim Reeve - Deputy Director & Chief Operating Officer V&A
- 3 x Design for Business and Innovation participants
- 3 x V&A freelancers
- 4 x Dundee creative businesses/freelancers
- 8 x members of V&A Dundee Young People's Collective

LIST OF FIGURES

Figure 1: V&A Dundee in numbers

Figure 2: A renewed interpretation of V&A Dundee

Figure 3: Total (direct, indirect and induced) gross economic impacts, Dundee, Tay Cities Region and Scotland – on-site and off-site – September 2018 to September 2023

Figure 4: Proportion of visitors to V&A Dundee by place of residence (2018 September to September 2023)

Figure 5: Satisfaction of visitors to V&A Dundee by time period

Figure 6: Visitor satisfaction with V&A Dundee exhibitions

Figure 7: Summary of responses to V&A Dundee

Figure 8: Number of V&A Dundee visitors making their first trip to Dundee by time period (000s)

Figure 9: Number of visitors to Dundee (2011 to 2022, 000s)

Figure 10: Double Diamond

