



Fife

Tourism &
Events Strategy
2019- 2029



**Fife Tourism Partnership**
Delivering together

Foreword

The last four years have been exciting for Fife, we can now proudly boast the new five star attraction of Dunfermline Carnegie Library and Galleries, the World Heritage status of the Forth Bridge has been confirmed, the Queensferry Crossing has officially opened and the V&A in Dundee is welcoming its first visitors too. All of this new investment in tourism in Fife and on our doorstep will bring new opportunities and benefits for us.

Through collaboration we have seen a number of great projects rise and grow from strength to strength, Fife Food Network, Fife Golf Partnership and Forth Cruise Project are just some examples, but we will continue our successful partnerships, working with Fife's six Local Tourist Associations to ensure local businesses and communities can get involved and help to drive tourism to their area.

I am pleased to present this new Fife Tourism and Events Strategy which takes advantage of new opportunities but will also see a programme of digital projects commence across Fife to help attract fresh audiences. This includes the new augmented reality project, led by the Heartlands of Fife Local Tourist Association and the digital tours project in Dunfermline - a new and exciting project that will provide real-time interpretation of heritage sites across the city for the first time.

There is no doubt that Fife needs to embrace the digital era right across its interaction with visitors from when they are looking and planning their holiday to when they have been and are sharing their stories about Fife with family and friends.

Moira Henderson, Chair, Fife Tourism Partnership



Background

The Fife Tourism and Events Strategy 2019-2029 has been developed by the Fife Tourism Partnership in conjunction with Fife Council and the Local Tourist Associations along with detailed input from tourism businesses in Fife. The strategy sets out an ambitious, yet realistic, challenge for the Fife tourism sector to achieve even stronger economic and employment growth.

In 2014 the Fife Tourism Partnership set out to achieve 4% economic growth annually with a target of £416m by 2024. In 2016 this target figure was exceeded, with tourism in Fife now contributing £566m annually to the Scottish economy, supports 11,500 full time equivalent jobs and represents around 9% of the Fife's workforce. This growth highlights the huge potential that Fife has through its tourism sector. Employment levels have also grown to pre-recession figures (11,500) further demonstrating the resilience within the sector.

The establishment of the six [Local Tourist Associations](#) has been a major factor in Fife's tourism success. The Local tourist Associations are now all contributing to the economy of their local area, embracing the opportunities that arise through collaboration and by implementing new and exciting activities they have brought additional visitors into Fife.



The
FifeFive

Five places you won't
believe are in Fife

The thematic groups like [Fife Food Network](#) and [Fife Golf Partnership](#) have also added to Fife's success; both sectors show growth, not just in the economic returns they bring to Fife but in terms of investment, Fife is one of very few areas that is seeing new golf courses being built and its food offering is also growing from strength to strength. Bowhouse for example is a good example of how food is utilised to attract new visitors to the East Neuk.

Fife Tourism Partnership set out a clear action plan in 2014 to deliver a strong marketing campaign to promote Fife through embracing the digital era. In 2016 Welcome to Fife, the Partnership's consumer facing campaign name moved to digital only marketing and since then it has seen almost half a million interactions on its website each year, it has also grown Facebook followers from 529 in Aug 2014 to 14,383 Aug 2018 and has been recognised as the third highest searched-for location in Scotland on [TripAdvisor](#) with 5 million searches in 2017 alone and one of the top 5 regional destinations in the UK on [Instagram](#).

The recent Fife Fives marketing campaign has proved a hit on social media with thousands of clicks through to the [WelcometoFife.com](#) website and onward to individual businesses. The campaign, which shows five elements of what Fife has under key themes such as culture and heritage, food and drink, walking, outdoor, golf and family days out link to the market segments identified through VisitScotland research.



Throughout the life of the previous strategy Fife has seen higher tourism growth percentages in GVA and in tourist numbers, this growth has been the result of hard work from within Fife's thematic groups with great examples of the reputation Fife's food and drink offer with all marketing of this sector focussing in on great choice, buying locally sourced foods and from the many food bloggers and journalists who write passionately about the food and drink offer in Fife.

The [Outlander group](#) too, has focussed its marketing on the niche of film tourism and is now showing great interaction on social media but more importantly through the numbers of tourists at their events.





Strategic Context

The 2015 Scottish Government Economic Strategy seeks to build on Scotland's strong reputation and brand with cultural and tourism promotion. The Scottish Government will continue its focus to develop businesses within key sectors; one of which is tourism.

This strategy has been developed to align with Scotland's national tourism strategy "Tourism Scotland 2020: The future of our industry, in our hands" including its mid-term review, the marine tourism strategy "Awakening the Giant" and VisitScotland's Tourism Development Framework for Scotland. Fife's Local Outcome Improvement Plan "Plan for Fife 2017-2027" contains the ambition to make Fife one of Scotland's best loved tourist destinations by attracting more visitors, year round, and increasing the annual visitor spend with one of the actions to achieve this being to "improve access to local assets and facilities".

The Fife Economic Strategy 2017-2027 identifies tourism as a key sector within the Fife economy and recognises the importance of the sector in contributing to Fife's overall economic growth. The Fife Tourism Partnership is recognised as the lead delivery agent for tourism within the strategy's Action Plan. The strategy sets out to target support to the Tourism, Culture and the Creative Industries including supporting businesses to develop and use new digital platforms and maximising the opportunities from new national assets and tourism products.

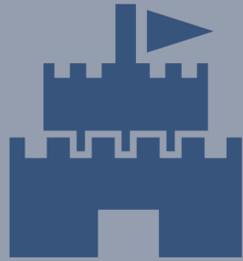


1
Sightseeing by car/
coach/on foot
74%



2
Visited a cathedral,
church, abbey or other
religious building
65%

3
Visited a historic
house, stately home
or castle
60%



4
Short walk
or stroll
56%



5
Visited a beach
53%



6
Shopping
48%

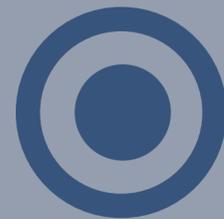


7
Long walk, hike, ramble
48%

8
Visited a country
park
44%



9
Visited cities
44%



10
Centre based
walking
44%

Fife's Visitor Mix

Annual research carried out by Destination Research on behalf of Fife Council, tracks domestic and overseas visitors and whether they are visiting Fife for a day visit or whether they are spending longer here and what type of accommodation they are using.

In 2017 Fife welcomed almost 8.5m visitors with 7.7m spending the day here, leaving around 700,000 visitors staying overnight. Of those visitors that stay, they stay on average 4 and half days and are more likely to choose serviced accommodation, followed by self-catering as their accommodation choice. Visitors to Fife spend around half of their budget on accommodation, followed by food and drink and shopping, demonstrating the importance of quality accommodation, interesting and quirky shops and importantly the food and drink offer across Fife.

Whilst a high proportion of those visiting Fife are here for holiday or business purposes, Fife boasts a vibrant number of people who are here visiting friends and relatives and as such demonstrates the importance of promoting what is available in Fife to those that live in Fife.

The latest research from VisitScotland shows that that top 10 activities undertaken by visitors whilst they are here are sightseeing and visiting a cathedral, church, abbey or other religious building. The figures on the right show the importance of Fife's outdoor credentials, over three quarters of visitors undertook some kind of outdoor experience, demonstrating too that the health and wellbeing elements of a visit are important for those that visit Fife.

This latest research into visitor behaviour features heavily in the Welcome to Fife marketing elements and link closely to what is highlighted on the WelcometoFife.com website and its associated social media channels.



Achievements and Opportunities

There have been a number of achievements over the life of the previous strategy and all provide a continuous opportunity to grow the Fife tourism and event economy further. These include:

- **Achieving World Host Destination Status for Fife**
- **Trip Advisor stating that Fife is the 3rd highest searched for destination in Scotland (5m searches in 2017)**
- **Maintaining 4% visitor expenditure growth each year**
- **Investments in attractions, hotels and restaurants right across Fife**
- **Dunfermline Carnegie Library and Museum achieving 5 star status and voted "Best building in Scotland" by The Royal Incorporation of Architects Scotland, Andrew Doolan prize 2017**
- **New openings in the Food and Drink sector – six new distilleries opened**
- **Scottish Natural Heritage research shows that Fife is still the destination of choice for outdoor activities**
- **Fife events and festivals such as the East Neuk Festival and StAnza winning accolades and awards**
- **Fife businesses acknowledged as leading the accessible tourism sector**

The ambition of this strategy is to continue to push tourism in Fife as a leading tourist destination to further develop the achievements above and to push the bar even further by developing innovative tourism initiatives that will keep Fife at the forefront of tourism in Scotland.

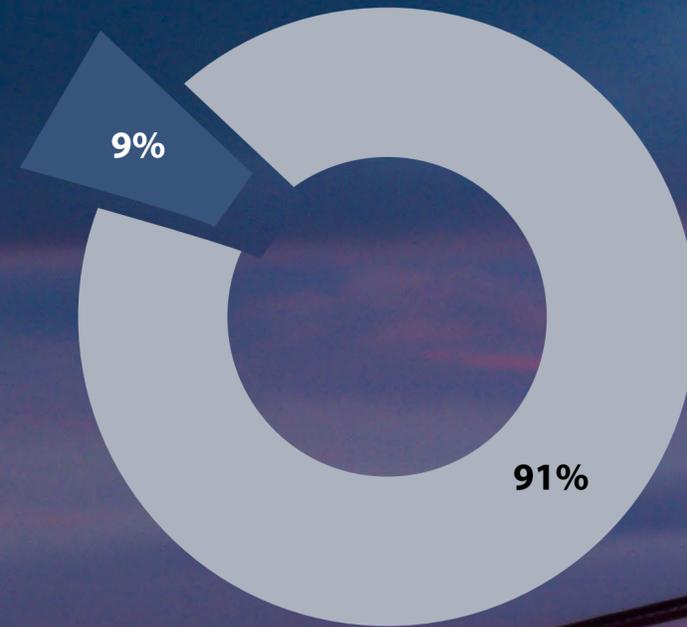
Employment in Fife

In 2016 there were a total of 11,568 tourism jobs in Fife which represents 9% of all employment in Fife, showing that Fife has returned to its pre-recession employment levels in this sector.

Recent research by Glasgow University* is showing that is set to continue to grow by around 5% by 2024 in line with the rest of Scotland.

Tourism jobs as a percentage of total employment

Total employed 
Tourism jobs 



This research also showed that managerial and supervisory roles and chefs are the hardest to fill vacancies in Fife. Further challenges are around the attractiveness of the sector and young people not being fully work-ready. However, the most stubborn challenge is around mobility as much of Fife's tourism employment is some distance from Fife's main population centres. Added to this is the continued investment in Dundee's growing tourism sector which is likely to attract Fife's experienced workforce away from Fife.

Skills Development Scotland recently reported that the highest requirement for jobs in Fife will be from within the tourism sector over the next ten years.

*Glasgow University, Fife Workforce Modelling, 2017



VISION

“By 2028 Fife will be one of the strongest digital destinations in Scotland where businesses are taking advantage of digital opportunities and visitors and locals alike are able to interact, book and share their positive experiences leaving their own digital footprint across Fife for others to view, share and experience for themselves”

Drivers for growth

Fife’s key strengths are both geographically and thematically based. St Andrews is an internationally recognised town and as such attracts a large number of overseas visitors each year. Its proximity to Dundee provides the unique position to attract new audiences of the V&A Dundee to stay in Fife. Dunfermline is working towards re-establishing itself as a cultural destination with large scale investment in the prize winning Dunfermline Carnegie Library and Galleries and cultural attractions like the Fire Station Creative. This, along with the inscription of the Forth Bridge as a World Heritage Site, raises the profile of the area as a key location for the heritage visitor.

Tourism groups such as [CruiseForth](#), Fife Golf Partnership, and Fife Food Network have worked tirelessly over the last five years to develop successful visitor campaigns. Through further collaboration, there is a real opportunity for these groups to create a strong sense of place, by adopting and developing the “Fife brand” and ultimately attracting new visitors to the area.

New product development needs to continue so that Fife can provide its visitors with new experiences so that we can attract them year after year. Activities such as the [“In the Footsteps of Kings”](#) Augmented Reality experience in the Heartlands of Fife will give an enhanced experience for visitors to the area and provide tourism businesses new product to promote to their customers. One of the most exciting projects will be the completion of the [Fife Pilgrim Way](#). The trail meanders through lesser-known communities but linking key attractions along the way.

Fife has the 4th largest economic contribution from the creative sector in Scotland, being home to over 600 creative businesses from those in the digital environment to high end arts and craft practitioners who export their wares all over the world.

Digital media will be at the forefront of Fife becoming a successful destination. Whilst the Welcome to Fife website continues to grow in use and now attracts almost 500,000 visits per annum, it’s the popular social media channels that are driving this growth in numbers to the website. With recent changes within Facebook, data protection and movement away from the now popular social media sites, it is critical that Fife is able to react to any changes in order that this growth continues.

Strategic outcome 1

Creating Sense of Place and growing Fife's economy

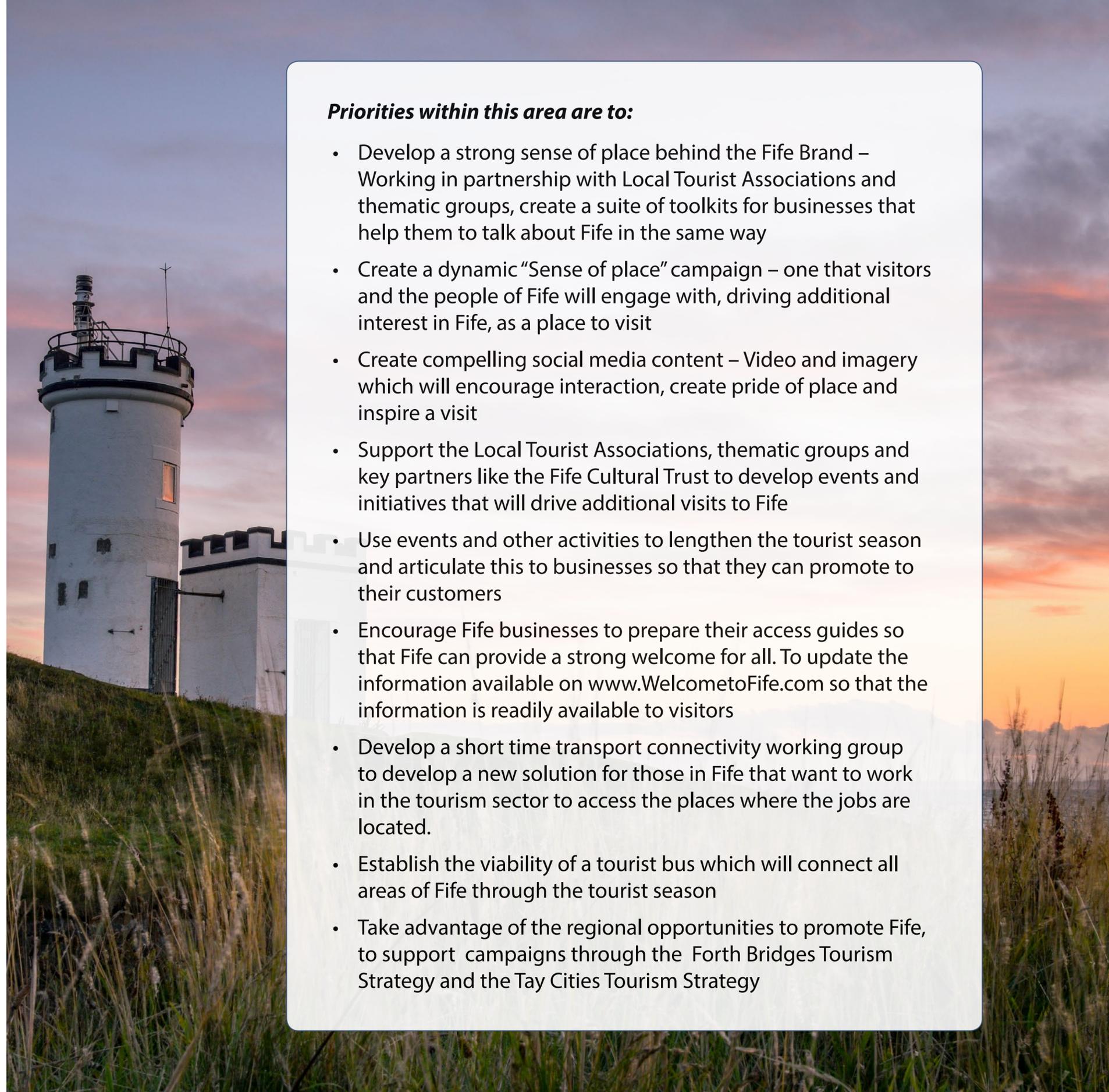
Target – Increasing the value of tourism from £565m to £836m

Given the uncertainty within the economy arising from changes such as those around Brexit, the minimum wage and non-domestic rates, Fife needs to work hard to maintain and grow its visitor income in order to support the sector. In the past, Fife has worked doggedly to create a strong business collaboration around key themes as a way of developing its product in order to attract new markets. So, for the future, this activity needs to be strengthened so that the brand "Fife" is the overarching visitor message. If Fife can achieve this one message, then Fife will be able to compete more effectively with other destinations such as Edinburgh and Glasgow. This will also help Fife to further mitigate the impact of seasonality.



Priorities within this area are to:

- Develop a strong sense of place behind the Fife Brand – Working in partnership with Local Tourist Associations and thematic groups, create a suite of toolkits for businesses that help them to talk about Fife in the same way
- Create a dynamic "Sense of place" campaign – one that visitors and the people of Fife will engage with, driving additional interest in Fife, as a place to visit
- Create compelling social media content – Video and imagery which will encourage interaction, create pride of place and inspire a visit
- Support the Local Tourist Associations, thematic groups and key partners like the Fife Cultural Trust to develop events and initiatives that will drive additional visits to Fife
- Use events and other activities to lengthen the tourist season and articulate this to businesses so that they can promote to their customers
- Encourage Fife businesses to prepare their access guides so that Fife can provide a strong welcome for all. To update the information available on www.WelcometoFife.com so that the information is readily available to visitors
- Develop a short time transport connectivity working group to develop a new solution for those in Fife that want to work in the tourism sector to access the places where the jobs are located.
- Establish the viability of a tourist bus which will connect all areas of Fife through the tourist season
- Take advantage of the regional opportunities to promote Fife, to support campaigns through the Forth Bridges Tourism Strategy and the Tay Cities Tourism Strategy



Strategic Outcome 2

A Digital Tourism Industry

Outcome Target – 1 million page views on WelcometoFife.com

Today's visitor expects to book online and to share experiences whilst they're here and afterwards when they return home. Fife needs to press ahead with its digital connectivity aspirations so that even in rural locations, booking systems, social media, apps and communications work effectively.

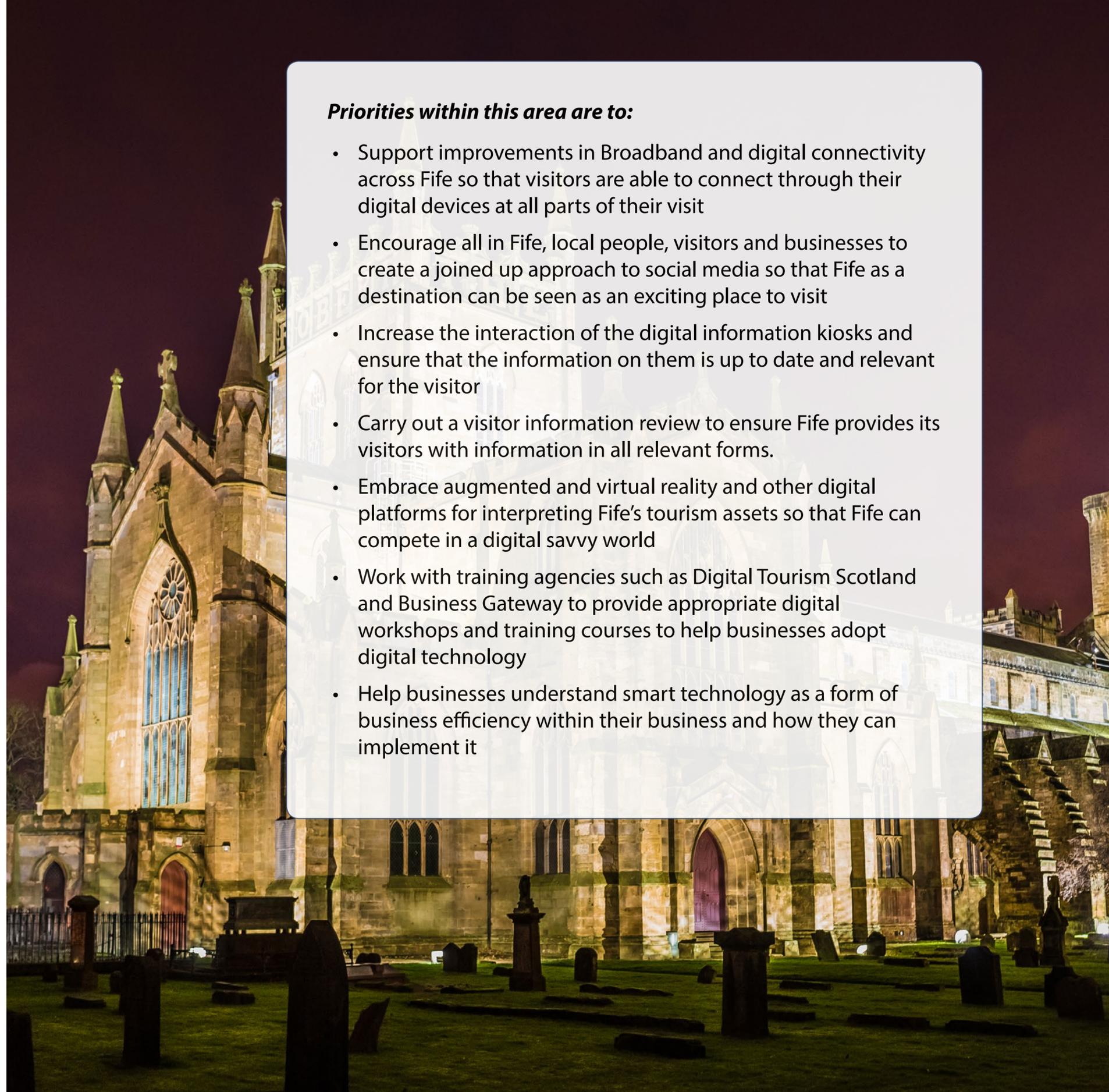
Everyone involved in tourism needs to become a digital advocate, whether this is a member of the front line team encouraging visitors to use their business hashtag or booking facilities, or owners implementing better digital systems to reduce costs.

Adopting digital practices includes visitor information and interpretation of our heritage and is at the heart of how Fife will appeal to new digital savvy audiences in the future so platforms such as augmented and virtual reality have to be at the forefront of future activities.



Priorities within this area are to:

- Support improvements in Broadband and digital connectivity across Fife so that visitors are able to connect through their digital devices at all parts of their visit
- Encourage all in Fife, local people, visitors and businesses to create a joined up approach to social media so that Fife as a destination can be seen as an exciting place to visit
- Increase the interaction of the digital information kiosks and ensure that the information on them is up to date and relevant for the visitor
- Carry out a visitor information review to ensure Fife provides its visitors with information in all relevant forms.
- Embrace augmented and virtual reality and other digital platforms for interpreting Fife's tourism assets so that Fife can compete in a digital savvy world
- Work with training agencies such as Digital Tourism Scotland and Business Gateway to provide appropriate digital workshops and training courses to help businesses adopt digital technology
- Help businesses understand smart technology as a form of business efficiency within their business and how they can implement it



Strategic Outcome 3

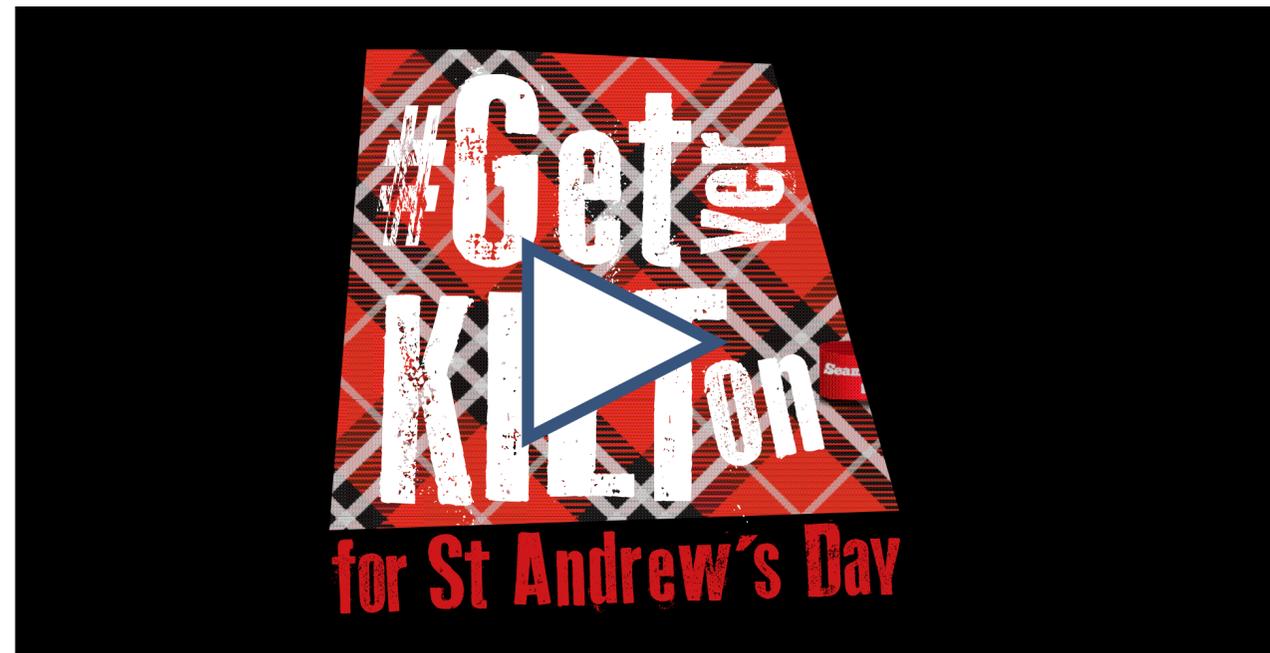
A Strong and successful events sector

Outcome Target – Increase the value of events in Fife from £18m to £20m

Fife hosts around 6,000 events each year and brings around £18m to the Fife economy. Events are important to Fife as they can raise awareness of an area and attract visitors who would not otherwise come. Events also bring vibrancy and excitement to the area and they are a tool to help lessen the impact of seasonality.

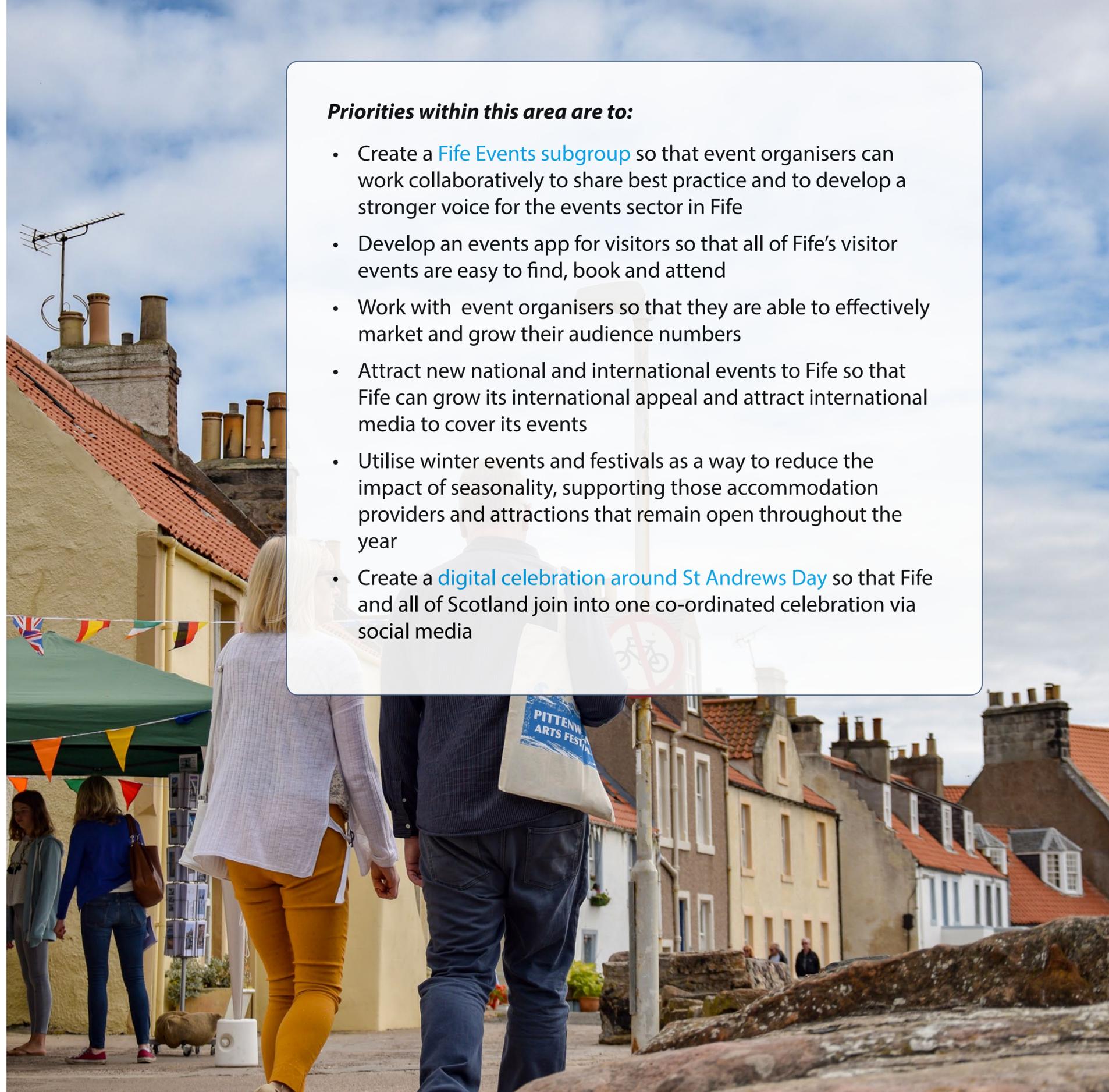
Fife attracts major sporting events for golf (for example, The Open Championships, Senior Open and Ricoh Women's British Open). These provide an international stage for Fife attracting many thousands of visitors from across the globe. The success of these events shows that Fife is able to accommodate large-scale events which demonstrates that there is an opportunity for Fife to attract other sporting and international events.

It is recognised that whilst Fife has a number of high profile events such as Stanza Poetry Festival and the East Neuk Festival, there is a real opportunity to create a strong sector where event organisers can collaborate in order to become more sustainable and to build on the number of visitors events bring to Fife.



Priorities within this area are to:

- Create a [Fife Events subgroup](#) so that event organisers can work collaboratively to share best practice and to develop a stronger voice for the events sector in Fife
- Develop an events app for visitors so that all of Fife's visitor events are easy to find, book and attend
- Work with event organisers so that they are able to effectively market and grow their audience numbers
- Attract new national and international events to Fife so that Fife can grow its international appeal and attract international media to cover its events
- Utilise winter events and festivals as a way to reduce the impact of seasonality, supporting those accommodation providers and attractions that remain open throughout the year
- Create a [digital celebration around St Andrews Day](#) so that Fife and all of Scotland join into one co-ordinated celebration via social media



Strategic Outcome 4

Tourism is a career by choice

Outcome Target – Increase the number of Fulltime Equivalent jobs from 11,500 to 13,000

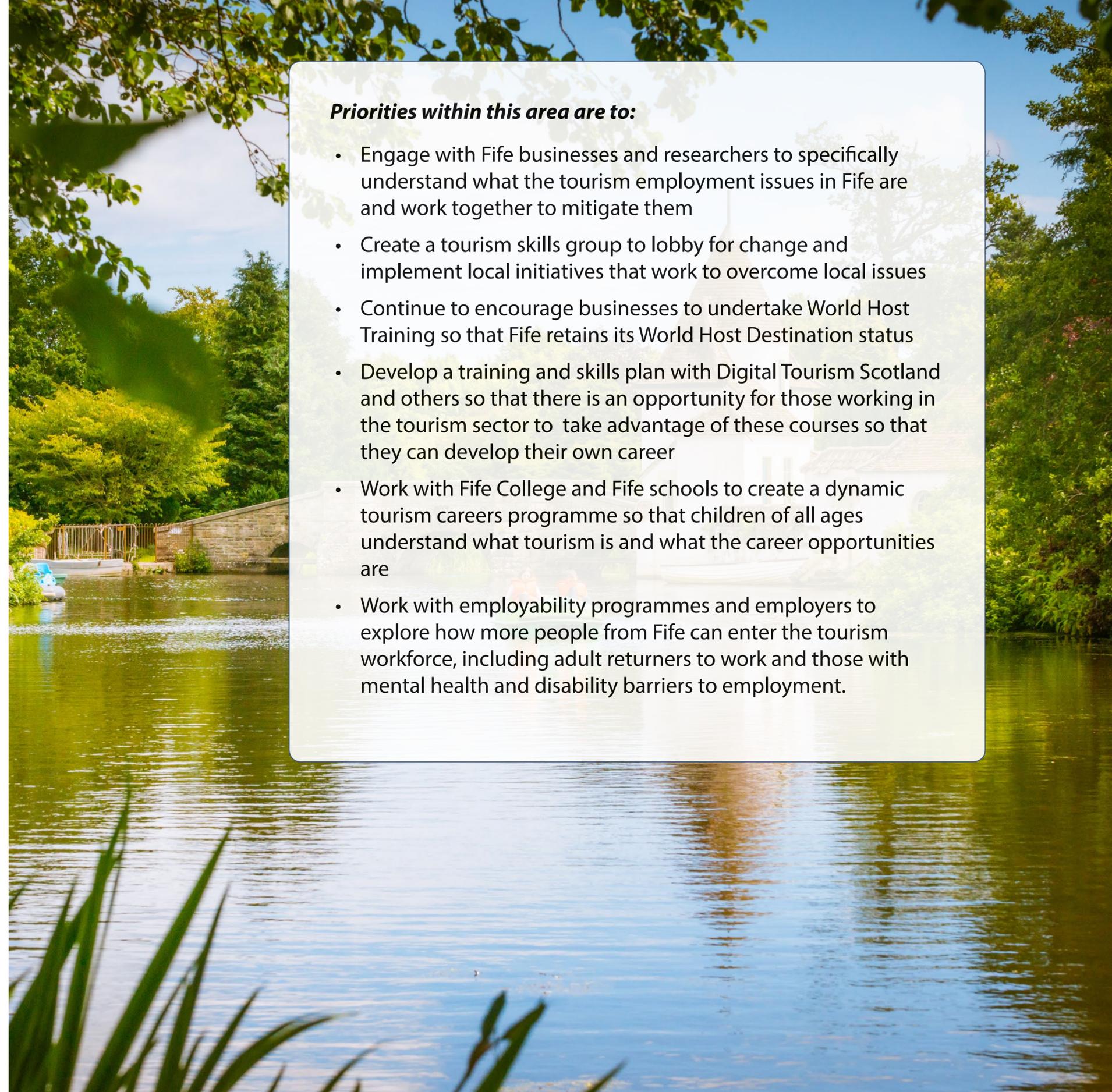
The number of tourism jobs in Fife now match the number of jobs prior to the recession in 2008, when Fife lost a number of pubs/Inns and accommodation. In recent years, massive investment in new attractions, hotels and the food and drink sector have helped to achieve this situation. The challenge now is to grow this number so that tourism in Fife becomes more resilient.

There are a number of challenges that need to be overcome, the newest being the impact of Dundee and its major waterfront investment which will undoubtedly lure Fife's experienced workforce away from North East Fife. Skills Development Scotland and recent research from Glasgow University has identified that leadership within a destination from its business community is paramount to the on-going success of a destination. Fife needs to embrace this thinking and provide opportunities to develop leadership skills within the sector.



Priorities within this area are to:

- Engage with Fife businesses and researchers to specifically understand what the tourism employment issues in Fife are and work together to mitigate them
- Create a tourism skills group to lobby for change and implement local initiatives that work to overcome local issues
- Continue to encourage businesses to undertake World Host Training so that Fife retains its World Host Destination status
- Develop a training and skills plan with Digital Tourism Scotland and others so that there is an opportunity for those working in the tourism sector to take advantage of these courses so that they can develop their own career
- Work with Fife College and Fife schools to create a dynamic tourism careers programme so that children of all ages understand what tourism is and what the career opportunities are
- Work with employability programmes and employers to explore how more people from Fife can enter the tourism workforce, including adult returners to work and those with mental health and disability barriers to employment.



Supporting Themes

Sustainable and Responsible Tourism

Fife needs to encourage and implement sustainable tourism principles so that Fife's reputation as a leading tourism destination can be maintained into the future.

Priorities for this area are to:

- Maintain a strong tourism and events economy by working collaboratively to develop new products and to ensure that those working and running tourism and events businesses in Fife can adapt to change.
- Encourage social sustainability by engaging with local Fifers of tourism and events campaigns so that they get involved by attending events, encouraging their friends and relatives to join them and by adding to the social media buzz for Fife.
- Environmental sustainability is important for Fife, our amazing coastal and outdoor offer attracts millions of visitors each year and this reputation for outdoor recreation has seen Fife voted "No 1 for outdoor recreation" for eight years. To maintain this reputation it is important for Fife to work with the Fife Coast and Countryside Trust, Scottish Natural Heritage, the RSPB and others so that Fife can protect its outdoor assets through careful promotion and appropriate maintenance.
- Environmental consideration for large scale events will also be managed as set out in the Fife Events Quick Reference guide.



Delivering the Strategy

The strategy identifies the strategic direction, nature and scale of the challenges involved in realising the overall strategic vision and achieving the objectives for each strategic outcome. A detailed Action Plan will be developed which sets out how each of these strategic outcomes will be achieved and which partners will be involved in delivering against each of these actions. The Fife Tourism Partnership Board will then monitor progress of these actions against targets set within this strategy.

Measuring Success

In order to track progress against targets and to constantly review activities, it is essential that performance towards achieving the objectives and targets this strategy is monitored over the coming years. This will be achieved by:

- **Economic Impact Research**
Fife Council subscribes to the Cambridge Economic Impact model. This is an industry recognised model that utilises a number of studies in order to calculate the volume and value of tourism.
- **Fife Tourism and Events Strategy Action Plan Activity Measures**
The action plan will report on progress of the activities undertaken by all the public and private sector partners engaged in delivering the Fife Tourism and Events Strategy.

