

FIFE TOURISM STRATEGY 2007 – 2015

INTRODUCTION

Fife is a successful tourism destination whose appeal centres on its natural environment, particularly its coastline. Fife's strong golfing product, along with St Andrews, attracts from international markets and elevates Fife to one of the few truly international destinations in Scotland. With the industry contributing over £200million¹ annually to the local economy and accounting for over 11,000 jobs (full-time and part-time), representing almost 9% of the workforce in Fife², tourism is an important and growing sector for Fife.

However, if Fife's tourism sector is to continue to grow and prosper, there is a need to focus more succinctly on Fife's genuine key strengths and to consolidate industry and public sector activity to ensure that the economic benefit of existing and potential tourism strengths are maximised.

This document has been developed by the Fife Tourism Alliance and seeks to guide both industry and public sector investment to ensure maximum economic impact is achieved. Building on previous tourism strategies, it sets out the key strategic themes and provides a framework for tourism development in Fife. It is supported by a separate Action Plan, which will be reviewed annually and amended as appropriate to take account of achievements, market demands and the general operational environment.

STRATEGIC CONTEXT

The Fife Tourism Strategy 2007-2015 is set in the context of, and closely aligned with, the Scottish Executive's recently published "Scottish Tourism – The Next Decade – A Tourism Framework for Change". At the local level, the Fife Tourism Strategy is set in the context of the Fife Community Plan and the Fife Economic Development Strategy and Action Plans, along with the Fife Structure Plan.

The "Tourism Framework for Change" outlines the framework for growing Scottish tourism and it draws on Smart Successful Scotland and the Framework for Economic Development to ensure it has a sound strategic basis. It sets the challenging target of increasing the value of Scottish tourism by 50% by the year 2015 and its ambitious national vision for Scottish tourism is:

"To make Scotland one of the world's foremost visitor destinations by 2015."

The Fife Community Plan "A Stronger Future for Fife" sets out key milestones for a Stronger, More Flexible and Diverse Economy which includes "An increase in Fife's share of Scottish tourism expenditure". The Fife Tourism Strategy supports the Fife Community Plan in terms of its activities towards achieving growth in the value of tourism in Fife and in its objective of strengthening communities.

¹ Source: STEAM 2005

² Source: ABI 2005, NOMIS

The Economic Development Strategy for Fife "Growing Fife's Future" seeks to promote Success in Key Sectors. It aims to create a more balanced economy in Fife by focusing support on Fife's existing and potential key growth sectors. Tourism is recognised within the Economic Development Strategy as a sector with competitive advantage and in particular seeks to grow Fife's tourism infrastructure and tourism businesses.

The Fife Structure Plan "Fife Matters" seeks to complement, support and inform other key related strategic documents such as the Fife Tourism Strategy. The Structure Plan aims to create "strong, attractive, vibrant and thriving communities", which will help ensure that Fife's overall tourism product is of high quality, generates employment opportunities and creates confidence for inward investment.

THE CHALLENGE FOR FIFE

Realising the national growth target of at least 50% means growing the Fife tourism sector in revenue terms from a £218 million industry to one worth £327 million per annum in 2015. This is a huge challenge and can only begin to be achieved by adopting agreed, carefully focussed strategic priorities and encouraging innovative approaches.

It must also be recognised that, in order for Fife to grow its tourism sector, there are a number of significant challenges and opportunities including:

Environmental Concerns - Fife has some beautiful countryside and coast but there can be congestion and pressure points and a loss of environmental quality.

Declining Domestic Market - Domestic markets, on which Fife is highly dependent, are under pressure as the competition for leisure time/spend increases.

Major City Effect - Fife is located in close proximity to Edinburgh which is an opportunity but there is increasing competition for its core markets.

Resistance to Embrace Change - Fife has an experienced and developed tourism sector but it must respond to changing patterns of demand.

Poor Communication - More effective communications between Fife tourism producers/agencies and its markets are needed, possibly via new technologies.

Duplication/Co-ordination – Although not exclusive to Fife, tourism efforts have sometimes lacked co-ordination and suffered from duplication of effort.

Sustainable Tourism Development – There is a need to consider whether tourism growth is sustainable not only for the economy but also for Fife's communities and environment.

Cross-Sector Linkages - The creation of cross-sector linkages across the tourism industry as a whole offers opportunities for creating economies of scale whilst also strengthening the product offering.

Innovation - Fife needs to more effectively and speedily grasp new investment opportunities. These could include business tourism for example where some gaps in provision in Mid Fife and areas of over-capacity of offering in some parts

of St Andrews provide opportunities. The overall supply of accommodation and business and conference facilities (particularly in Mid Fife) may not be sufficient to meet the needs of current and future consumers. There is considerable scope for investment in areas where the cultural and heritage product offering is not as well developed as in others. There is also development potential for a leisure and outdoor activities hub within Fife.

As well as addressing these largely Fife-specific issues, the area must get the basic elements of the tourism experience right if it is to successfully grow its tourism sector. Fundamentals such as quality accommodation; things to see and do; good signage; a warm welcome reinforced by the highest standards of customer care and service; and high environmental standards are now core aspects of visitor expectations and not optional extras. Whilst these aspects will not usually be the prime reason for visiting an area, growth in tourism can only be sustained if the quality of the natural and built environment which underpins Fife's appeal is maintained and tourism is welcomed by the communities in which it takes place. These core aspects are the responsibility of partner agencies and the private sector alike.

The tourism sector is growing globally but it is intensely competitive. Trends in tourism and leisure habits, combined with changes in consumer lifestyles and life-cycle mean that no destination can afford to stand still. The challenge for Fife is to surpass competitor and emerging destinations by capitalising on Fife's assets to create a desirable and unique must visit/must return destination.

This strategy outlines how, by building on Fife's key competitive strengths and taking consumer trends into account, we can prioritise and allocate resources to differentiate Fife in a crowded market place, as well as supporting the national agenda for tourism growth. It provides a vision for Fife as a tourism destination, and for developing Fife's tourism infrastructure and products to meet and exceed customer expectations. By focussing on selected aspects that will really make a difference it will bring about real change in Fife's tourism industry, including increasing its contribution to the area's economic and social well being.

THE VISION

We have developed a vision which recognises that a step-change within the tourism industry is required in order for us to achieve our goals. Our vision for Fife in 2015 is:

A place which offers visitors a quick and easy escape from urban living. Fife offers visitors a sense of physical and emotional well-being through the provision of high quality, authentic experiences and opportunities to relax, be reinvigorated (through activities, experiences or the environment), to reconnect and focus on quality of life aspects.

The vision is informed both by Fife's key competitive advantages and research that indicates "people are looking for authenticity, inspiration and rejuvenation" (The Henley Centre "Snapshots from the Future").

THE OBJECTIVES

The following key objectives underpin the vision:

- Providing an authentic experience for visitors to Fife
- Promoting Fife as a must visit region
- Strengthening and enhancing the cultural and heritage tourism offering across Fife, particularly in Dunfermline and Kirkcaldy
- Ensuring that the economic benefit derived from tourism reaches as wide an area of Fife as possible particularly in Mid Fife where areas (including Levenmouth and extending across the M90 to Kelty) have not recently benefited from tourism to the same extent as other areas of Fife
- Developing tourism in Fife in a sustainable and responsible manner
- Improved and effective management for delivery of initiatives

THE TOURISM FRAMEWORK FOR CHANGE

The Scottish Executive's "Tourism Framework for Change" provides a context for the development of the Fife Tourism Strategy. Within the national strategy there are a number of central themes for action and within each of these cross-cutting themes there are clear implications for Fife.

- 1) Knowing Your Market – maximising the availability and the use of market intelligence
- 2) Exceeding Visitors' Expectations – providing the "wow" factor that encourages visitors to come again and recommend us to others through quality products, places and facilities which are attractive, innovative, authentic and distinctive – all supported by top quality service. There is particular focus on the following areas:
 - Quality of the visitors' experience
 - People and skills
 - Innovation and product development
 - Culture, events and sport
 - E-business
 - Access and transport
- 3) Marketing and Promotion – targeting the markets with the highest likelihood of return
- 4) Sustainability – achieving growth in a way which balances the needs of the economy, communities and the environment

Within the Fife Tourism Strategy and Action Plan we show alignment with these national themes and demonstrate how the Fife strategy supports the national strategy.

FIFE'S STRATEGIC THEMES

The vision will be achieved by adopting a strategic approach focussing on developing the compelling themes and experiences which capitalise on Fife's location and competitive strengths and which are based on market research.

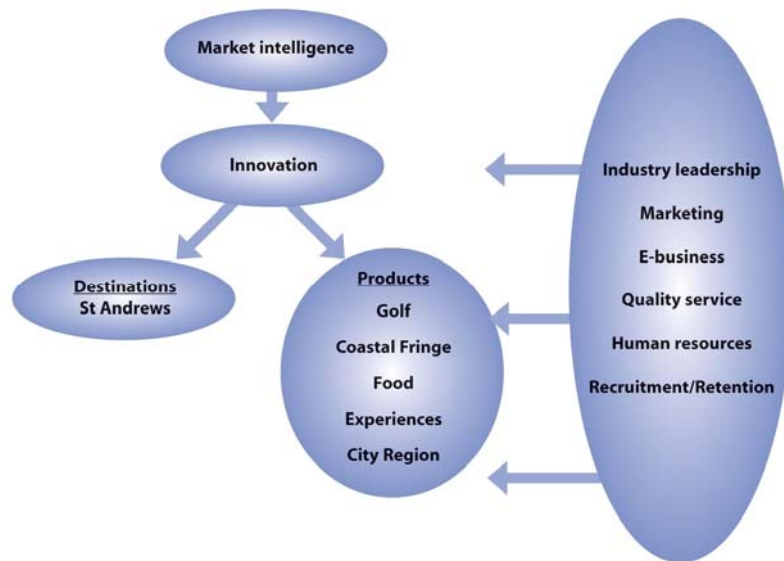
Fife's inherent strengths in terms of its appeal have been identified as being:

- Golf
- Coastal Fringe
- Experience Portfolio
- Food
- St Andrews
- City Region
- Culture and heritage

These are the "motivators" in terms of winning more business for Fife and form the foundation upon which this Strategy is built. Nevertheless, in each instance there are issues which require to be addressed if Fife is to deliver the basic infrastructure and environmental features that contribute to a destination - to be able to deliver on its brand promise and offer authentic and memorable experiences which meet and exceed consumer expectations.

In recognition of the need to create a step change in tourism, priorities for investment in the tourism infrastructure and skills development within the industry as a whole have also been identified and forms a final, cross-cutting theme for the Strategy. Priorities to address the issues and challenges identified against each of the themes have been outlined and these form the basis for the Strategy's Action Plan. The need for investment in infrastructure and skills cuts across all the themes of the Strategy and requires to be addressed across all the actions of the six themes.

Fife's Approach



Fife's Strategic Themes

STRATEGIC THEME ONE

Fife – The Location of Choice for Golf

It is recognised that golf, although a world game, has Scotland (and St Andrews) as its spiritual home and there is huge cachet in this as well as a further reflection of the concept of “authenticity”. There exists in Fife a tremendous golf heritage along with a wealth of talent and expertise and with 47 courses and associated facilities there is an extensive range of facilities for the visiting golfer. Indeed, it is anticipated that the supply of golf is likely to increase in years ahead, in both Fife and Scotland as a whole, and an increasing number of members’ clubs are looking to address the visitor market, with varying degrees of success.

Issues and Challenges

However, according to consumer research³ there is limited awareness of the breadth of the Scottish product offering as well as a continued prevalence of golf “myths” surrounding difficulty, accessibility, availability and cost. In addition to the need to tackle these “myths”, there is a need to address cost barriers through communicating the overall value for money offered rather than focusing purely on the low/high green fees and their associated perceptions of poor quality/exclusivity. Moreover, there is a need to make it easier to “buy” a golf experience – to facilitate ease of build of individualised breaks by providing straightforward and “linked up” access to the various elements of the product offering (travel, accommodation, offers, golf passes, packages etc).

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³ Attitudes towards Golfing Breaks in Scotland

Priorities

- Undertaking marketing activity which emphasises off-peak periods in order to extend the season and optimise year-round capacity
- Encouraging innovation and collaboration in product development for example a number of course operators working together and with others in the tourism sector for joint offerings
- Improving the experience of the visiting golfer through skills, product enhancement and quality assurance initiatives
- Developing industry skills and knowledge of e-commerce to facilitate the purchase of golf products
- Maximising the benefit to Fife of the Open Championship and the Dunhill Cup
- Developing golf course facilities to broaden the offering

STRATEGIC THEME TWO

Fife's Coastal Fringe - A Quality Experience

Fife offers a comprehensive coastal “experience” comprising the Fife Coastal Path, picturesque villages and harbours, beaches, maritime heritage, restaurants. Much of Fife’s tourism product is concentrated in coastal communities which themselves comprise many of the “icons” of Fife and the area’s coastal assets have been identified in the Fife Visitor Survey as major influences on the decision to visit Fife.

Issues and Challenges

The coastal “experience” is, however, not all that it could be and there are a number of challenges in this area. The Fife Visitor Survey pointed to low levels of awareness of the Fife Coastal Tourist Route and the award winning designation of a number of the main beaches. There are issues of labour supply and a highly seasonal nature to many tourism activities and enterprises. While the Fife Coastal Path has seen much investment in recent years, little is known about the characteristics of users and how the Path and related products could be further developed as a major attraction for Fife. Interpretation and orientation measures are also inconsistent and the issue of quality, in terms of products and the environment, remains a concern.

A recently undertaken tourism study for Levenmouth highlighted the lack of good quality budget accommodation provision along the Fife Coastal Path. It suggests examining the potential for such accommodation between Dysart and Lundin Links in order to capitalise on new market opportunities likely to arise through increased use of the Fife Coastal Path, particularly through growth in niche markets such as golf and in business activities at the Fife Energy Park. Furthermore, linkages with coastal settlements in relation to such accommodation, other product linkages (particularly the cultural heritage offering of Dysart and West Wemyss) and improved transportation (such as that offered by the re-introduction of rail services in the Levenmouth area) will be sought along the Path’s route.

Priorities

- Improving signage, interpretation and orientation
- Examining the case for extending the Fife Coastal Path
- Improving the packaging, theme-ing and presentation of the “coastal experience” through product innovation and linkages
- Developing the tourism product and accommodation offering along the Fife Coastal Path particularly in areas where there are issues relating to product supply such as Levenmouth and parts of West Fife

STRATEGIC THEME THREE

Building an Exceptional Visitor Experience

Fife has an extensive range of both large scale and smaller events, particularly those with arts and cultural themes. Events are acknowledged as key drivers for tourism and can address niche opportunities, regional spread and seasonality. The events programme is complemented by an extensive range of attractions and activity provision that offer a range of experiences. Research into future tourism trends undertaken by the Henley Centre describes how offering sports, outdoor leisure activities, spas and retreats can be excellent ways of building on the natural attraction of Scotland and quest of well-being.

Issues and Challenges

However, a number of events in Fife have reached a plateau in terms of their sustainable development and are facing uncertainties as to the future. For example, arts and cultural festivals such as the Pittenweem Arts Festival, StAnza Scotland’s Poetry Festival, Crail Festival, Aberdour Festival, St Andrews Week Festival and others are constrained in terms of their future development, management and sustainability. Linkages between complementary events (particularly those with a cultural theme) could be improved in terms of sharing resources and experience.

With regard to visitor attractions, there are challenges too in terms of sustaining visitor numbers and expenditure in a highly competitive environment. Consumer choices are increasingly being made on the type of experience that is being offered by a particular facility and increasingly attractions and activity providers are having to look at their own events programme to broaden their overall appeal.

The overall Fife visitor experience is not simply about events and attractions in complete isolation however. It is becoming increasingly important for the industry to work together across sectors in order to provide an integrated and seamless tourism package which offers the visitor a total quality experience from pre-arrival to departure. Vertical linkages across sectors could include accommodation providers working in conjunction with leisure and activity providers along with the food and retail sectors to offer a complete visitor experience package that not only appeals to but also exceeds visitor expectations and ensures both repeat and referral visits.

Priorities

- Improving collaboration between events organisation and visitor attractions
- Developing and positioning the East Neuk as the “cultural corner”
- Providing business development support for key arts and cultural events
- Developing Fife’s spa based product offering
- Encouraging the creation of vertical linkages across all sectors of the tourism industry to offer a complete visitor experience package

STRATEGIC THEME FOUR

Fife’s Quality Food from Produce to Service

From quality produce to farmers’ markets and other food related events and to the concentration of award winning restaurants in Fife, the food and produce offering in Fife is a marvellous asset and one on which to build. There is increasing consumer interest in the provenance of food, healthy eating and the emerging Slow Food initiative and there are opportunities to make more of our natural resources in terms of local produce.

Issues and Challenges

The Tourism Attitudes Survey undertaken for VisitScotland reveals that there is a high level of interest from key markets in local cuisine when on holiday but visitors are less happy with their actual experience of eating out. There is clearly a challenge to deliver on the promise and achieve consistent standards in eating out establishments and in the pub offering. It is acknowledged that there are issues related to people and skills within the hospitality sector and the linkages between producers and catering businesses could be improved. Without doubt, a quality food and drink offering, from produce to service, will help to reinforce the image of authenticity.

Priorities

- Improving linkages and collaboration between food related producers
- Encouraging trade-led marketing initiatives particularly in off-peak periods
- Encouraging the use of local produce while Developing Fife’s “Slow Food” offering
- Improving the available supply, and the skills of hospitality workers
- Raising the quality of Fife’s food offering at all levels

STRATEGIC THEME FIVE

St Andrews – A World Class Destination

Internationally recognised as the Home of Golf, a cradle of Christianity and a seat of learning since the Middle Ages, St Andrews is a powerful driver for leisure and business tourism in Fife – the town accounting for over a quarter of Fife’s annual tourism revenues. St Andrews is an ever-present icon of Scotland and by virtue of its status and success as a destination it has seen major investment committed to its tourism products and infrastructure in recent times. In many respects, St Andrews is a Scottish tourism success story.

Issues and Challenges

However, there is a general acceptance that success has brought its own challenges for St Andrews. The St Andrews World Class initiative was established to address the local delivery of a world class experience that would complement the town's world class reputation. This is based on the recognition that St Andrews doesn't always deliver on this in terms of its infrastructure and service culture. The "St Andrews experience" can be patchy. Visitor management remains an issue and high volumes can bring particular pressures at given times, taking their toll on the physical (and to an extent natural) environment. The issue of the supply of key workers (and the necessary skills) for the tourism and hospitality sector is particularly pronounced in the St Andrews area.

Priorities

- Implementing the St Andrews World Class Initiative; destination management and world class heritage status for St Andrews
- Identifying and implementing product and business development projects in accordance with the Initiative
- Addressing key labour supply and skills issues for the tourism industry
- Ensuring the positive impact of the St Andrews World Class Initiative on other parts of Fife
- Developing sustainable models for the ongoing development of St Andrews World Class Initiative

STRATEGIC THEME SIX

Fife – Complementing and Capitalising on Edinburgh City's Success

As part of a growing trend, cities are experiencing tourism growth as they capitalise on the short breaks market. The increased number of air connections to and from Europe has helped to fuel an increase in overseas visitors to Edinburgh which has seen international visitors grow to 1.1 million in 2005. There is considerable strength in Fife's close proximity to Edinburgh which presents opportunities to capitalise on this growth in terms of day visits and short breaks.

Issues and Challenges

Fife's position relative to Edinburgh allows the positioning of certain tourism products and experiences alongside the city tourism offering. Fife offers clear opportunities for complementarity with Edinburgh's cultural, heritage and arts tourism products whilst also providing an escape from the city to the coast and countryside and the experiences that these provide.

Despite its proximity, however, the perception of Fife's remoteness from Edinburgh persists (not least among some Edinburgh residents themselves). In addition, there are issues of connectivity and transportation especially in relation to the consistent pattern of weekend traffic restrictions on the Forth Road Bridge which in turn have implications for the perception of Fife as an attractive leisure tourism destination.

Nevertheless, the opportunity exists to present Fife's tourism offering whether as integral to the wider Edinburgh tourism experience or as short breaks in Fife focused around the quality of the visitor experience.

Priorities

- Marketing specific Fife products as an integral part of the Edinburgh tourism “experience”
- Developing Fife's own short breaks product as complementary to the city break
- Developing the tourism product offerings of the Firth of Forth and around the Forth Bridges
- Improving public transport connections between Edinburgh and Fife and Edinburgh Airport and Fife

STRATEGIC THEME SEVEN

Developing the Cultural and Heritage Potential of Dunfermline and Kirkcaldy

Although not fully established as destinations in their own right, there are clear opportunities for maximising the tourism benefit in relation to Fife’s town centres of Kirkcaldy and Dunfermline – their revitalisation will ensure that our town centres operate effectively as a key element of the visitor experience. Alongside this, the development of Dunfermline’s heritage quarter will both strengthen the tourism offering for Dunfermline and have positive benefits for retail and leisure markets. The wider areas of these two towns contain tourism assets and there are opportunities to strengthen linkages with these communities, particularly from a presentation and marketing point of view.

Issues and Challenges

Despite its status as Scotland’s ancient capital, Dunfermline’s tourism infrastructure is not as fully developed as it could be. The historic attractions that are set in the historic townscape have created a heritage quarter but there is scope to improve the presentation of these assets to develop its visitor potential. There is also a need to shift consumer perceptions in terms of Dunfermline’s appeal as a visitor destination. Although there has been investment in leisure and tourism facilities in the Dunfermline area in recent times, this has been largely focused on the peripheries of the town rather than the town centre. In the next few years, a number of projects will come to fruition which will improve the attractiveness of the town centre including major projects relating to Pittencrieff Park, Carnegie Leisure Centre, a heritage strategy for the Abbey and Palace and a new museum. In the wider area, Culross has a strong offering as a heritage site and is a significant element of the overall Fife product. However, the village now only has a limited number of commercial enterprises and the National Trust for Scotland has been faced with a number of challenges in terms of the sustainable management of its estate in Culross.

Kirkcaldy shares some similar challenges to Dunfermline in terms of quality issues associated with its built environment as well as public perception. The town lacks a significant critical mass of attractions and visitor experiences although it has cultural attractions of note and is establishing an innovative events programme on the back of this. It has also been regarded as a town which has “turned its back” on its waterfront location although the ambitious Kirkcaldy Town and Waterfront Masterplan seeks to address this and the Kirkcaldy Renaissance initiative seeks to bring new investment and economic growth to the town including development in relation to leisure opportunities. Neighbouring Dysart is seeing significant investment in its townscape and built heritage and can be regarded as a strength of the wider Kirkcaldy tourism offering and one on which to build, particularly in the context of the Fife Coastal Path.

Priorities

- Develop the cultural and heritage product offerings of the Dunfermline and Kirkcaldy areas
- Develop the built environments and enhance the townscapes of Dunfermline and Kirkcaldy town centres

CROSS-CUTTING THEME

Investing Today for Tomorrow's Growth

While much of the thrust of the strategy is based on the aforementioned key competitive strengths it is recognised that these will be supported by broad investment in Fife's tourism product in terms of the area's infrastructure. There is recognition that tourism has the ability to contribute to local economic development initiatives, particularly in terms of spreading the benefits of tourism and improving the image of the area.

Investment opportunities:

The overall tourism infrastructure in Fife must meet the needs of its current and future customers particularly those in the key growth sectors. A growth sector of the future is business tourism which is important in developing out of season business and contributing to overall occupancy levels in low season. According to scenario planning research carried out for VisitScotland, business tourism is anticipated to almost double by 2015 and will grow more strongly than the overseas visitor market. There is an apparent shortage of provision for business and conference facilities in Mid Fife in particular which needs to be addressed if Fife is to capitalise on this growing market. North East Fife can also derive benefit from its proximity to Dundee in terms of capitalising on potential overspill from business tourism focused around Dundee.

In terms of overall hotel accommodation provision, a recent audit found that there are some substantial gaps in provision across Fife and within a range of different hotel types. For Fife to compete effectively in an increasingly competitive market the appropriate capacity and profile of offering must be created to meet the various market demands.

Right People, Right Skills

The Scottish Executive's Tourism Framework for Change highlights the need for investment in people and skills:

"We need to ensure that everybody working in tourism has the skills and attitude to give visitors the warm welcome and an enjoyable and interesting stay, to add positively to every visitor experience. Our ambition is to have the best regarded tourism workforce in the world with highly skilled managers and leaders who nurture and value their staff"

Fife's tourism and hospitality employees at all levels need the right skills to provide a high quality service and this must be addressed across the industry. There are also technical and occupational skills shortages particularly within the catering hospitality sector. This is an issue which is recognised at the national level and the creation of skills passports has been developed to assist in the development of key skills within the industry.

Tourism continues to be viewed as a less than attractive career choice in many cases. This attitude must be reversed in order that the industry can be seen as a serious and attractive career option. Work is currently being undertaken with Fife schools to raise the profile of the tourism industry as a first choice career option. This project, the Fife Tourism Challenge, supports the overall Determined to Succeed programme for schools and also shares some of the objectives of the national Pride and Passion initiative.

Priorities

- Maximising the positive impact of tourism on the image, environment and economic well-being of Fife's communities ensuring that Fife is attractive to inward tourism investment
- Extending the business tourism product offering in Mid Fife in particular
- Addressing the gap in provision of a range of hotel accommodation supply across Fife
- Investigating the potential for a series of tourism, leisure and outdoor activities based around Kelty and incorporating developments in Lochore Meadows, Blairadam Forest, St Ninians and Knockhill
- Build on the opportunities presented by Rosyth as Scotland's international passenger ferry port
- Ensuring that the tourism development dimension is taken into account in the structure and local planning process
- Raising the profile of the industry as a career choice through projects such as the Fife Tourism Challenge
- Addressing skills gaps and shortages throughout the tourism industry and promoting the utilisation of Skills Passports

DELIVERY AND EVALUATION

Delivering the Fife Tourism Strategy – Making it Happen

The tourism sector is unique for the range and diversity of people and organisations involved. Although aligned to the national Tourism Framework for Change, the Fife Tourism Strategy has also been developed in the context of the strategic objectives of the Fife Economic Forum. Within that context, responsibility for overseeing the delivery of the Fife Tourism Strategy objectives and Action Plan priorities rests with the Fife Tourism Alliance.

Successful delivery of the Fife Tourism Strategy can only be achieved in partnership and all agencies, organisations and businesses involved in tourism must play their part in effectively driving forward the objectives of the Strategy. This will depend on establishing good working relationships between the public and private sector and between tourism enterprises. This is key to minimising duplication and maximising impacts through effective management and organisation. Successful delivery of the Strategy will involve:

- 1 Developing strong partnerships and networks, both within Fife and externally
- 2 Making best use of resources by concentrating on the agreed strategic themes and a willingness to share/pool resources
- 3 Reducing duplicate/competing activity e.g. marketing activity
- 4 Actively seeking out and bidding for new resources to deliver strategic priorities
- 5 Adopting an evidence driven approach, demonstrating the effectiveness and impact of actions by stringent monitoring and evaluation

In terms of resources to deliver the strategic objectives, the Fife Tourism Strategy is currently supported by the Fife Strategic Tourism Development Fund which provides funding for projects which are aligned to the Strategy and which can demonstrate that they will significantly enhance the product in Fife to provide a step change in tourism in Fife. Additionally, the public sector partners will continue to invest varying levels of funding support in specific tourism development projects over the life of the Strategy.

Monitoring and Evaluation

Regular reviews are vital to monitor and evaluate the success of the Strategy against its overarching objective of increasing the value of tourism revenue by at least 50% by 2015.

The Action Plan will be revised each year to take account of achievements and changing market conditions. The Strategy will also be subject to review and revision within three years.

The Fife Tourism Alliance reports on a regular basis to the Fife Economic Forum and formal annual progress reports/reviews of the Fife Tourism Strategy will be presented to the Forum. Our vision and aspirations are to 2015 and the intention would be to review

progress with the aim of increasing our aspirational target for a further 10% growth beyond the national target in the last few years to 2015. The monitoring framework as set out below will therefore be reviewed as necessary on an annual basis.

A number of existing sources of data will be used to assist with monitoring and evaluating the effectiveness of the Strategy.

Monitoring Framework

Headline Indicator

Indicator	Source	Baseline	Year	Aspiration
Visitor Expenditure	STEAM	£218m	2005	Grow by 50% to £327m in 2015

Supporting Indicators

Indicator	Source	Baseline	Year	Aspiration
Visitor Numbers	STEAM	5.8 million ⁴	2005	Grow by 20% to 7.0 million in 2015
Seasonality	STEAM	£30m Jan-March £52m April-June £93m July-Sept £43m Oct-Dec	2005	Oct-March increase in value - above average inflation
Total Employment	ABI, NOMIS	12,043	2004	15,676
Annual Average Occupancy Levels in Hotel Accommodation	VisitScotland Occupancy Survey	61%	2005	66%
Annual Average Occupancy Levels in Guest House/B&B Accommodation	VisitScotland Occupancy Survey	51%	2005	54%
Annual Average Occupancy Levels in Self-Catering Accommodation	VisitScotland Occupancy Survey	57%	2005	60%
Average Spend Per Visitor Per Night	UKTS/IPS	UK - £39 Overseas - £65	2005	UK - £59 Overseas - £97
Numbers Participating in Quality Assurance Schemes	VisitScotland	505	2006	100% of registered tourism businesses participating in appropriate schemes
Average QA star rating - Serviced accommodation	VisitScotland	3.33 stars	2006	3.5
Average QA star rating - Self catering accommodation	VisitScotland	3.46 stars	2006	3.6
Average QA star rating - Visitor attractions	VisitScotland	3.30 stars	2006	3.5
Numbers Participating in Green Tourism Business Scheme	VisitScotland	20	2006	100% of registered tourism businesses

In addition, data from ad hoc visitor and business surveys will be fed into the monitoring and evaluation process as appropriate.

⁴ Data relates to Tourist Days ie the total number of visitors multiplied by the average length of stay; Tourist Numbers were 2.8 million in 2005

Roles and Responsibilities

Although much of the responsibility for delivery of actions will rest with the tourism industry itself, in many cases the lead will be taken by a specific public sector partner. In broad terms, the core role and responsibilities of each of the public sector partners is as follows:

VisitScotland	<p>Marketing Scotland and its areas and tourism assets</p> <p>Providing information to visitors and potential visitors</p> <p>Providing quality assurance to visitors and quality advice to the industry</p> <p>Promoting partnerships with the industry</p> <p>Providing strategic direction to the industry</p>
Fife Council	<p>Providing direct funding support to the VisitScotland Fife network office (of around £400K annually) for the delivery of tourism services to businesses and visitors in Fife</p> <p>Providing a range of services to tourism businesses including roads, interpretation and signposting, health and safety, licensing, planning</p> <p>Operating facilities for visitors and residents including museums, galleries, theatres, libraries/genealogy services, parks, sporting and leisure facilities, conference facilities and community websites</p> <p>Administer the Strategic Fife Tourism Development Fund, Small Tourism Grants Scheme and the Town Centres Events Fund.</p>
Scottish Enterprise Fife	<p>Developing growth businesses: supporting growth businesses to increase their capacity and capability to successfully compete in relevant markets.</p> <p>Skills, Leadership and Management Development: attracting and developing the skills Fife's tourism industry needs, including front-line quality service as well as leadership and management skills.</p> <p>Innovation: facilitating relevant industry groups to identify and address gaps in the supply of products and experiences.</p> <p>Business collaboration: continue to develop and strengthen public/private sector partnerships with the St Andrews World Class project.</p>