



Fife Tourism: Identifying Growth Opportunities

Final Report

4th April 2023



Insights to inform your plans for growing tourism in Fife

- Fife Tourism Partnership commissioned 56 Degree Insight to undertake a programme of research in early 2023. The study aims and key questions it sought to address were as illustrated below.

Overall research aim: To obtain a detailed understanding of the views and opinions of potential visitors to Fife to inform plans for future marketing and product development.

What are the characteristics of potential visitors to Fife?

- Who are the 'best prospect' markets for Fife within the domestic UK market?
- What is their demographic profile? (e.g. age, social grade, lifestage)
- Where do they live?
- What are their interests, hobbies, values and attitudes to life?
- What are their media/ digital behaviours?

How do consumers perceive Fife?

- Levels of awareness/experiences of Fife as a destination
- What perceptions are based on e.g. experiences, recommendations, media, etc.
- Comparing knowledge and existing perceptions of Fife against those for other potential destinations in Scotland/ elsewhere in the UK. Where does Fife sit within the 'consideration list' what makes it more or less appealing?
- Testing destination appeal, what are strengths and weaknesses, does appeal increase when consumers are made more aware of the offer? Which aspects increase appeal most?

What actions need to be taken to achieve growth ambitions?

- Obtaining views from consumers on what Fife Tourism Partnership and the industry needs to do to make the destination more appealing to them – what aspects of the destination should be the focus of communications? What are the gaps in what is currently on offer that could be filled?
- What are their reactions to concepts for marketing and product development?

How have/are potential visitor attitudes changing?

- To what extent have attitudes to travel and holiday decisions changed in comparison to pre-pandemic?
- How is the cost of living crisis impacting upon behaviours and attitudes?
- What other factors are influencing decisions e.g. climate concerns?
- How could Fife better cater for their changing needs?



This project is funded by the UK government through the UK Shared Prosperity Fund.

- A two stage research approach was followed to gain a mix of quantitative insight regarding the current and potential Fife visitor market and more in-depth, qualitative insights regarding potential target markets in different lifestages.

Stage 1 - Survey of potential market

- 1,025 online interviews undertaken between 13th and 25th January 2023
- All respondents were residents of Scotland (excluding Fife) or the North of England.
- All respondents had visited or would seriously consider visiting Fife in future
- A 15 minute questionnaire covering general attitudes to day trips, short breaks and holiday taking, destination choices and perceptions of Fife as a destination.

Stage 2 - Programme of focus groups

- Six 1 hour duration online focus groups each attended by 5 respondents undertaken on 27th February and 6th March 2023
- Participants recruited through the survey with respondents invited to take part in a follow up stage.
- The composition of each group was as follows:
 1. Scottish Empty Nesters – living more than 1 hour drive from Fife
 2. English Empty Nesters – living in the North East England
 3. Scottish Young Independents and Young Families - all living more than 1 hour drive from Fife. Young Families had children aged under 11
 4. English Families – living in North East England, children under 11
 5. English Families – living in North West England - children aged 12 or over
 6. Scottish Families and Young independents - living within 1 hour drive time of Fife
- Topics covered included the holiday planning process, reactions to Scotland as a destination, detailed discussions of Fife as a destination and testing of marketing.

General attitudes towards holidays and days out



In general when planning a day out or break in the UK scenery, great food, history and the chance to socialise and relax are key for most

- Survey respondents were shown a list of factors and asked to select those most important to them if they were choosing a UK destination for day trip, short break or longer holiday destination.
- Scenery, local food and drink, history and heritage, relaxing and spending time with family and friend were most frequently selected..

	Day trip	1-3 night Short break	4+ night Holiday
 Enjoying scenery	50%	66%	51%
 Trying great local food and drink	47%	62%	45%
 Being able to visit heritage attractions/ historic sites	49%	59%	42%
 Spending time with family or friends	45%	60%	49%
 Relaxing and unwinding	33%	63%	55%
 Getting away from it all	32%	63%	56%
 Connecting with nature	42%	56%	42%
 Experiencing local culture	40%	55%	41%
 Wildlife spotting	38%	48%	31%
 Being able to attend a festival or other event	35%	48%	24%

If you were planning a trip in the UK this year which of the following would you hope to get from the experience

For most the key benefit sought from holiday or break is the chance to relax and unwind away from the day to day stresses of home and work

- Similar responses were provided in the focus groups with being able to relax and unwind given as the main aim for holidays across the different life stages spoken to.
- For some this could more easily be achieved by visiting a familiar or close to home, easy to reach destination while others preferred to discover new places and try new experiences.

"A change of scene. If you're at home, you get stuck in the jobs and chores that need doing at home. So if you're just somewhere else, you've got none of that and you can just do what you choose to do. "Empty Nester, Scotland

"It was close because my, grandson was only a few months old. It was their first holiday and we didn't want to go any distance." Empty Nester, Scotland

Relaxing and unwinding

Escaping the stresses of home and work

Includes spending time with family or friends

For some delivered by taking part in active pursuits

A change of scene

Away from work and household duties

Discovering new places

Meeting new people

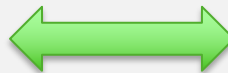
Trying new experiences

Returning to favourite places

Regular short breaks to close to home locations

A lower risk than trying somewhere new

Or revisiting places not been to for years

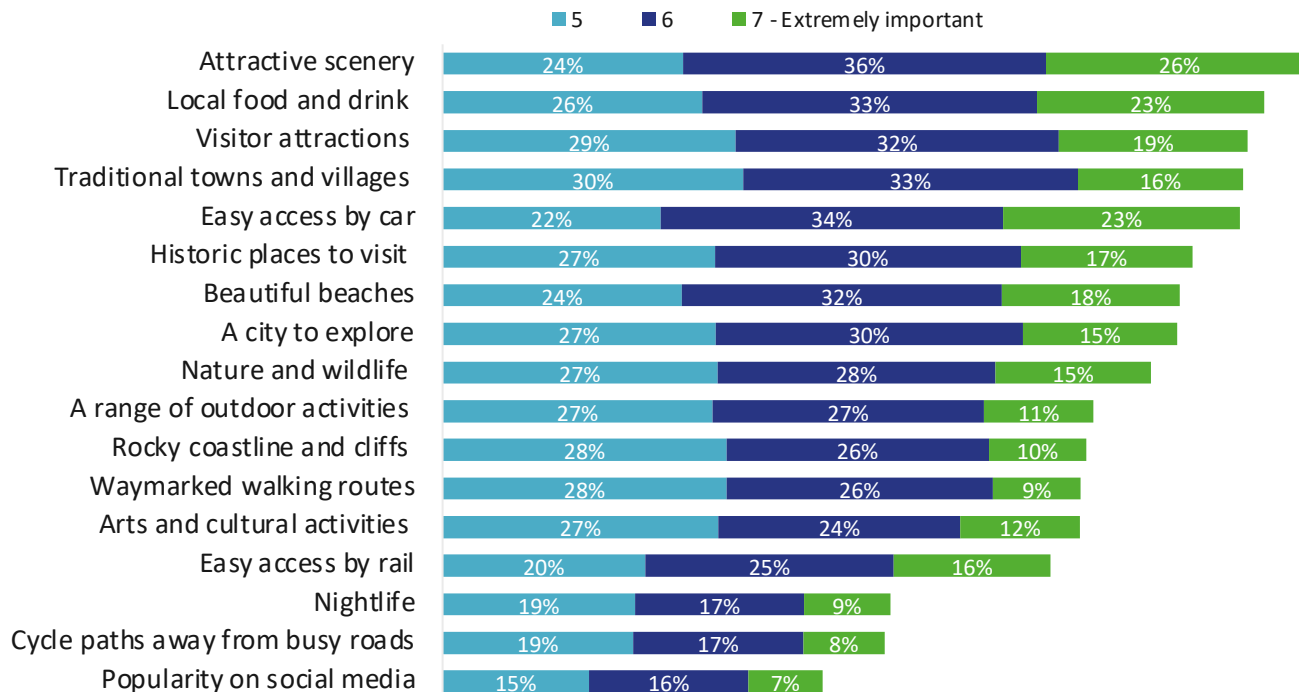


Can a close to home destination meet these needs?

Yes for some – especially those who prefer a shorter, simpler journey e.g. young families
BUT – not for others who consider close to home destinations to be too similar to home

Aspects most likely to be important when planning a UK holiday or short break include scenery, local food, attractions, traditional towns to visit and easy access by car

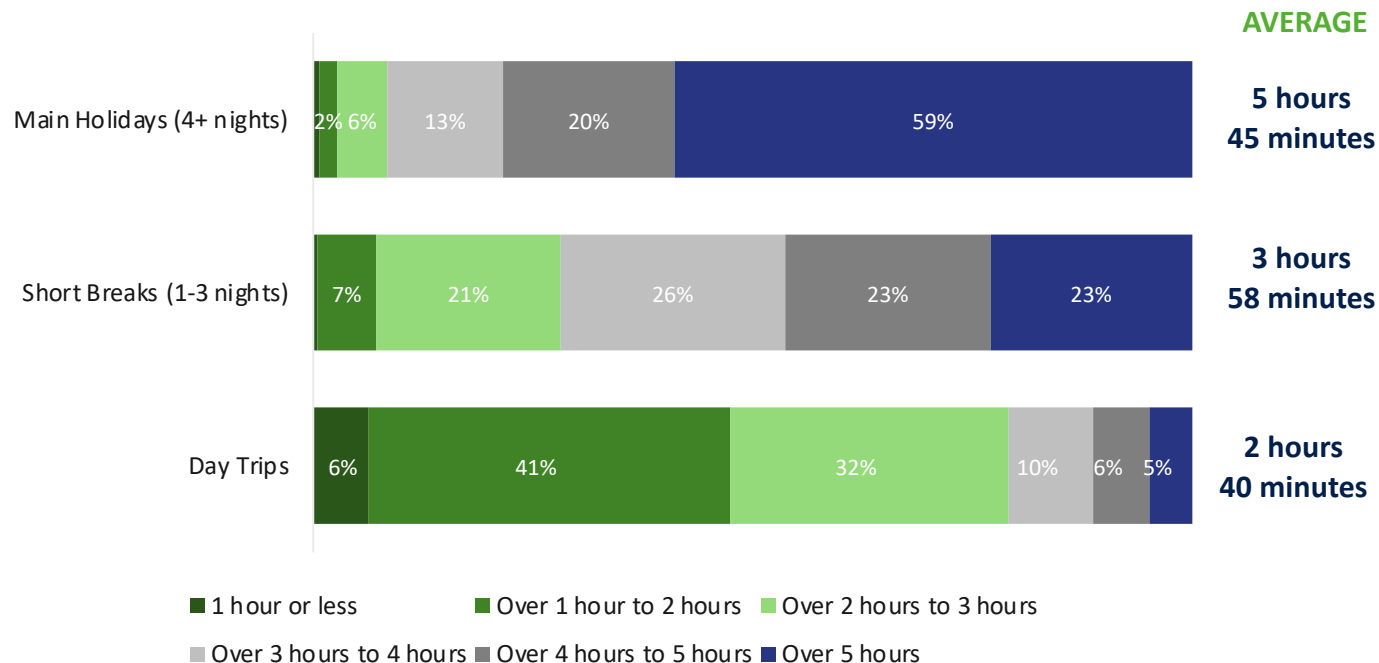
- A rating of the importance of a more detailed list of factors when planning a UK holiday or short break, reinforces the significance of scenery and local food and drink but also the key role of places to visit such as attractions, towns and beaches.



More specifically if you were planning a holiday or short break in the UK which involved any nights away from home, how important or unimportant would the availability of the following be when you were deciding where to go?

While most would travel for several hours for a main holiday, willingness to travel is somewhat more limited for short breaks and days out

- Respondents were asked how long they would be prepared to travel to reach their destination on different types of UK leisure trips.
- While most would be prepared to travel for more than 5 hours if they were taking a 4+ night trip, the majority would prefer to travel for shorter durations for a short break or day trips.
- The durations given by residents of Scotland and the North of England were similar.



If you were taking a leisure trip to somewhere in the UK, how long would you be prepared to travel to reach your destination for each of the following types of trip?

Things to do including time spent in nature and eating and drinking are important for most when choosing a UK destination

- In the focus groups more time was spent discussing the range of factors of importance when choosing a UK short break or holiday destination as summarised below and on the next page:



Things to do

The primary consideration for many, especially when children are in the party or if there are concerns over poor weather.

For families keeping children entertained is often the top priority.

For others the focus is more likely to be on pursuing personal interests or attending events.



Nature and scenery

A vital backdrop to many UK holidays which helps to provide the sense of escape/ relaxation sought.

Nature also provides a place to enjoy outdoor activities from playing with kids to walks, cycling and (for a minority) more intensive active pursuits



Food and drink

A key element of any UK holiday with the emphasis varying dependant on life stage (from simple food that keeps kids happy to more exclusive dining, etc.)

Locally produced, unique quality food and drink appeals to all, ideally available easily in local shops and eateries which provide an important part of the experience.

*"We're English Heritage members, so we like to go to places we can visit with that and I know we can use it now in Wales and Scotland too. So, yeah, so lots of castles and interesting houses to visit is good." **Older Family, North of England***

*"I like a bit of a challenge. I'm a hill walker and I used to do a lot of climbing, although I'm getting a bit past it now. I do like to go somewhere new and just a bit of a physical challenge while I'm there as well." **Empty Nester, Scotland***

Suitable accommodation and accessibility are also important considerations for most when considering options



Accommodation

A vital part of the destination choice with cost, facilities available (e.g. amenities for families, food and drink offer for empty nesters) and location are all important considerations.

Online sites such as Booking.com and TripAdvisor are regularly used to find accommodation.

Availability of deals can influence decisions to choose a destination (reference made to Groupon).



Access/ convenience from home

As shown on page 8, distance from home is more important when taking short breaks than longer holidays.

Attitudes also vary by life stage with those who have younger children and, to some extent, older people preferring easier to reach destinations which involve less travel.

*"I'm more likely to take UK based holidays now that we've got a baby, cause I'm a bit reluctant to venture too far on a plane with a baby that potentially might not enjoy the flight." **Young Family, Scotland***

*"Children have got to be kept busy so there's got to be lots of entertainment, massively child friendly. It would be my dream to go and lay on a beach but they have to be entertained all the time. It's kinda where we are..." **Young Family, North of England***

Covid-19 continues to be a consideration for a minority while rising costs of living are an increasing factor

- In the focus groups respondents were also probed on to what extent Covid-19 and the cost of living crisis was impacting upon their holiday and short break choices.



Ongoing impacts of Covid-19

A number of older respondents, mainly in the Empty Nester groups indicated that Covid-19 was still a consideration when they were thinking about travel, making them less likely to travel overseas in 2023.

This minority of respondents indicated they they had enjoyed UK travel during this period but were not quite ready to return to international travel in future.

"I've cut back on anything abroad now,, just with everything to do with Covid. I'm not comfortable, just with various people who've had Covid in the family and things like that. So we've made that decision at the moment to stay closer." **Empty Nester, Scotland**

"I haven't got a passport, not got around to renewing it. I think with Covid it was a good opportunity to explore more of the UK places that I've wanted to go, but just not got round to it, so we've taken that opportunity." **Older Family, North of England**



Increasing costs of living

Increasing prices and their impact on holiday and short break choices were mentioned most often by respondents in the Young Independent and Family lifestyles.

For some the costs of UK holidays were seen to have increased more rapidly than overseas holidays, in particular prices for accommodation and entrance charges for attractions.

This increases the importance of destinations offering free of charge/ low cost options for activities (whatever the weather)

"Um, so we went to Edinburgh Castle but I was a little bit disappointed 'cause the price of the tickets is quite high so I expected to see more." **Young Independent, North of England**

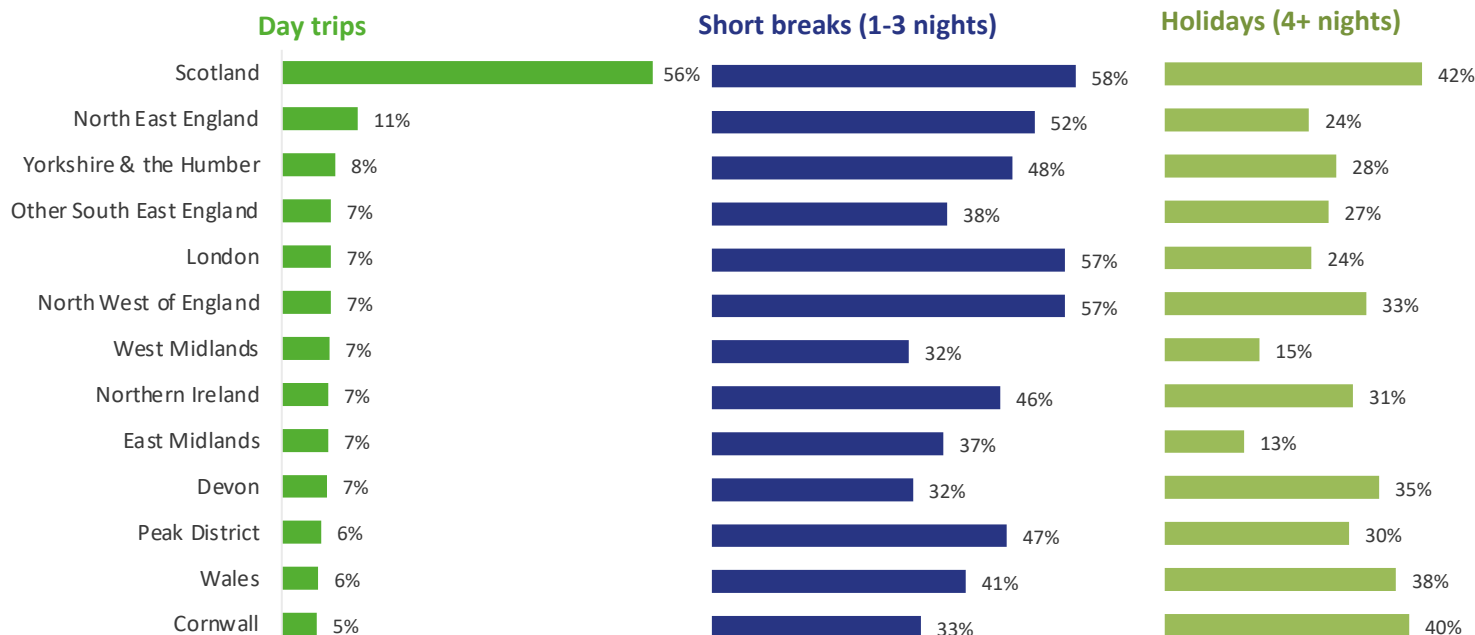
Opinions of Scotland as a destination



In addition to Scotland, Scots are likely to consider London and the NW England for short breaks and Devon and Cornwall for longer holidays

Destinations would seriously consider – Residents of Scotland:

- The survey recruitment criteria ensured that all respondents would seriously consider visiting Scotland for one or more types of leisure trips.
- As shown on the right, amongst Scottish residents, after Scotland the destinations most likely to be considered for a short break were London and North West England (including Lake District). Cornwall, Wales and Devon were most likely to appeal for a longer holiday.

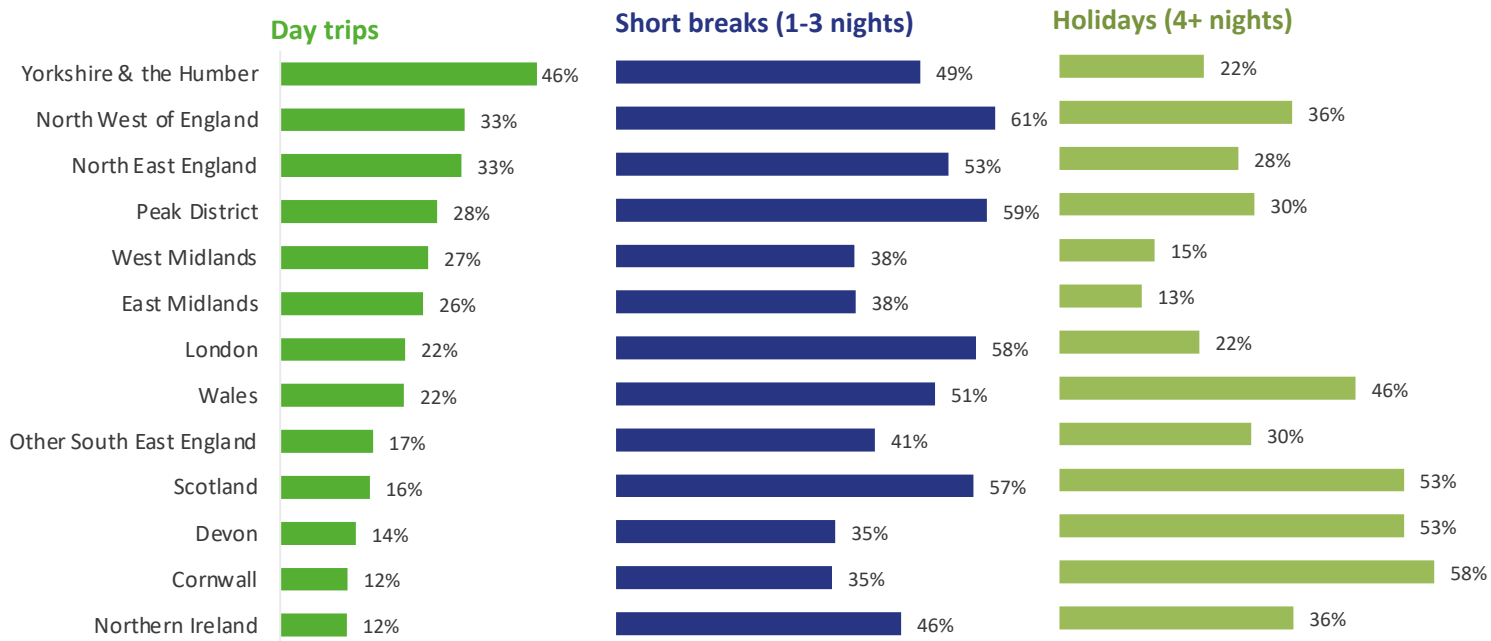


During 2023 which of the following places would you seriously consider visiting for each of the the following types of trip?

Competing destinations amongst the Northern English include NW England and the Peak District for short breaks and Cornwall for longer holidays

- The survey recruitment criteria ensured that all respondents would seriously consider visiting Scotland for one or more types of leisure trips.
- Amongst North of England residents, in addition to Scotland, destinations most likely to be considered for a short break were London, North West England (including the Lake District) and the Peak District. Cornwall and Devon for longer holidays.

Destinations would seriously consider – Residents of North of England:



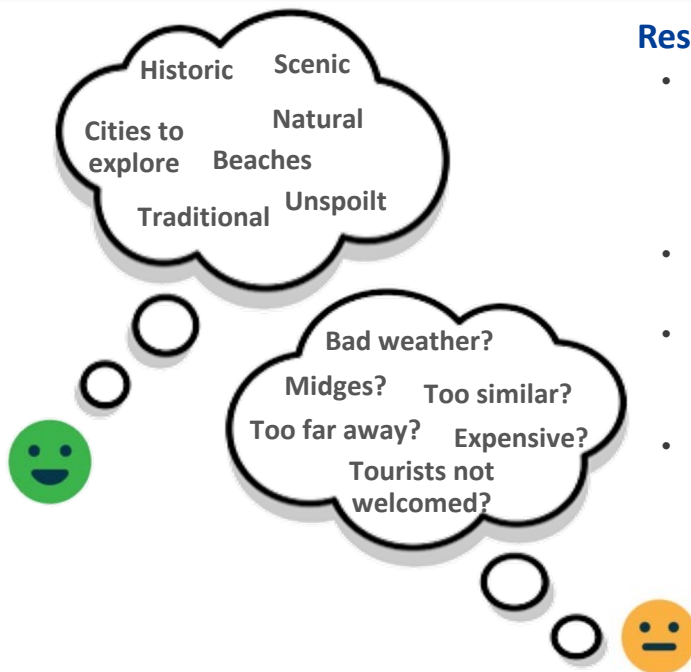
During 2023 which of the following places would you seriously consider visiting for each of the the following types of trip?

Scotland is well regarded as a holiday destination but levels of awareness and perceptions vary, particularly by place of residence

- A discussion of Scotland as a holiday or short break destination revealed a range of positive views plus some uncertainties, especially amongst those living in the North of England

Residents of Scotland

- High awareness and experience of a wide range of destinations
- Some have favourite places which are revisited regularly
- Ease of access and convenience is a key driver
- Main interest is in rural and coastal destinations which offer a change of scene and escape - Perthshire, the Highlands, Ayrshire coast and Dumfries and Galloway were mentioned.



Residents of North of England

- In general have much lower awareness of Scotland with views based on occasional visits (sometimes some time ago) or general perceptions from media, word of mouth, etc.
- Visits as often taken to cities as rural areas (sometimes for work trips).
- Edinburgh Festival and history are a particular appeal of cities. Cities are seen as small enough to explore on foot.
- Places mentioned as appealing include Edinburgh, Glasgow, Highlands and Islands, Loch Lomond and NC500

A number of specific concerns were referenced in relation to Scotland as a destination, especially amongst North of England residents

*"If I was going that distance, I'd wanna be going for a week to make that traveling worthwhile and I'm really struggling to think of a week's worth of things to do?" **Young Family, North of England***

*"I probably wouldn't go in when it's winter in like January or December. I would skip those months 'cause the temperatures can go like below zero. The rest of the year is fine." **Young Independent, North of England***

*"Before I ever visited, people used to say to me, oh, you don't wanna go to Scotland? Oh really? It always rains, and there's too many midges...But you know, having visited now quite a lot and been all around Scotland. Yeah, there are midges and yes, it does rain, but I don't let that put me off." **Empty Nester, North of England***

*"There, no guarantee of the weather and with kids, uh, there's nothing worse. But I mean, having said that my auntie and uncle, always went on holidays to Scotland when their kids were younger. There's lots of photographs of them with the kids on the beach, in the puddle suits and they absolutely loved it, building sandcastles." **Young Family, North of England***

*"It's getting to the point where people, the locals are not welcoming tourists. Yeah. You'd hate to think you're going to drive all the way up to Scotland and not be welcomed." **Young Family, North of England***

*"The thing for me is it's almost too close and it's almost too far. If I wanna go for a weekend, uh, it, it's too far to driving yet too expensive to fly and too much of a hassle to go on the train if I'm going into the Highlands." **Empty Nester, North of England***

*"Even like trying to get into like Stirling Castle or Edinburgh Castle, you're paying quite a bit of money. So if there's multiple people, you're probably gonna choose to spend that money somewhere else in your trip." **Young Family, Scotland***

*"....looking at places in Scotland to stay, you tend to find the accommodation is kinda sky high nowadays. So you can sometimes find going abroad actually cheaper." **Young Family, Scotland***

*"We've been to Scotland for holidays a few times over the years. We've always gone for at least five days though, usually seven. It's not somewhere I tend to think of too much for the very short breaks because its just that bit further. With having youngish children, I tend to think of it as more of a proper holiday than a quick break." **Young Family, North of England***

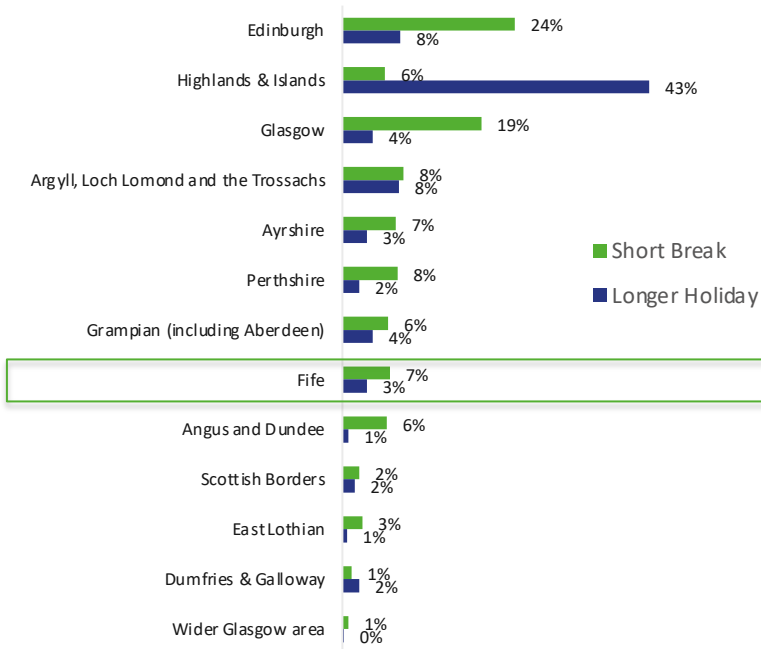
Opinions of Fife as a destination



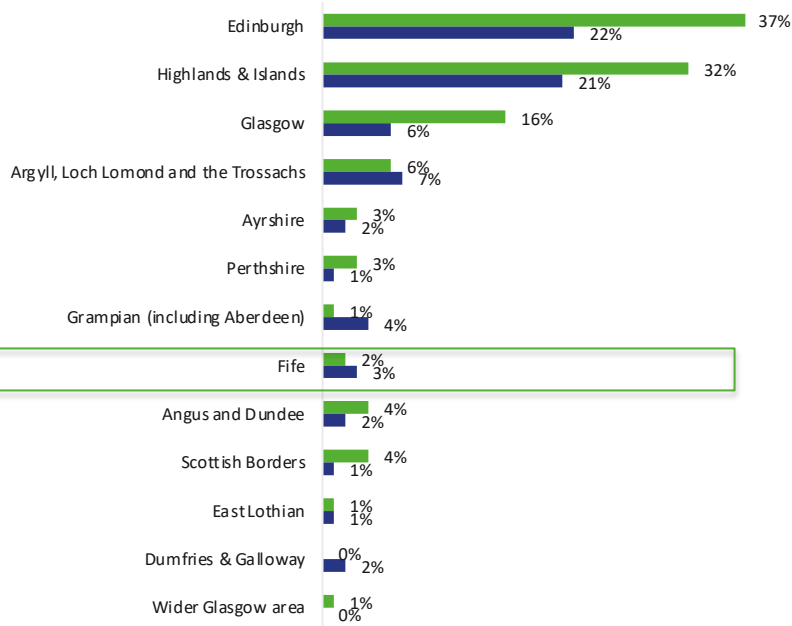
Small percentages suggested Fife when asked to name places in Scotland which they would seriously consider for a holiday or short break in 2023

- Asked to type in the names of places in Scotland that they would seriously consider visiting in 2023, Fife or places in Fife were mentioned by a small minority of both Scots and residents of the North of England.

Residents of Scotland



Residents of North of England

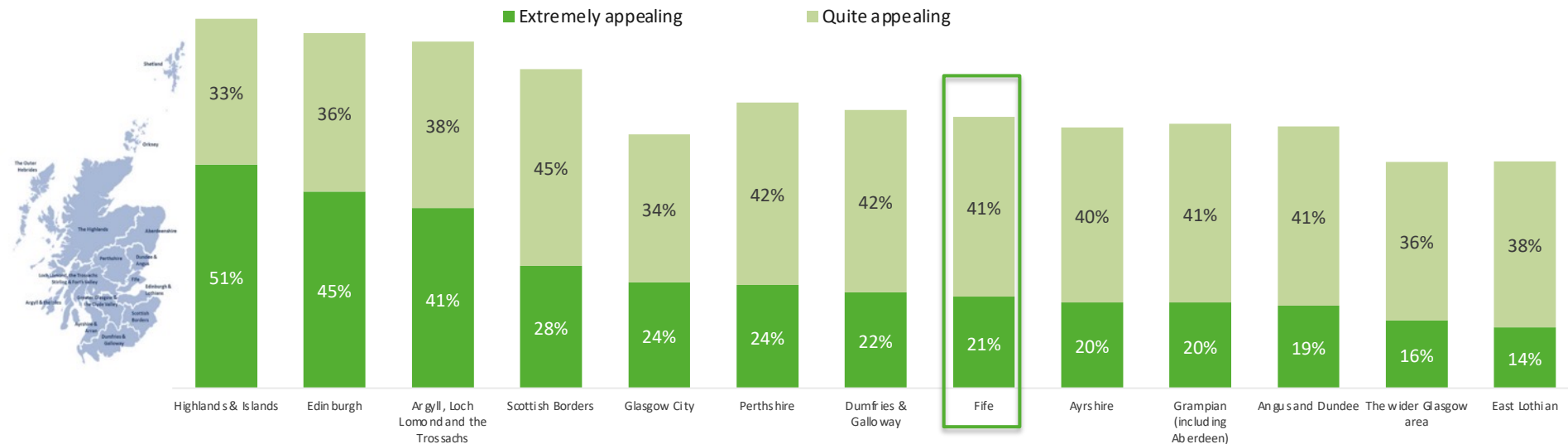


If you were planning the following types of trips during 2023, where in Scotland (if anywhere) would you seriously consider visiting?

With prompting, a fifth rate Fife as 'extremely appealing' as a place to visit for a holiday or short break

- Ranked on the basis of the percentages providing a rating of 'extremely appealing' Fife is the 8th most appealing destination while the Highlands and Island, Edinburgh and the Argyll and Loch Lomond areas are the most popular.

Appeal of Scottish regions including Fife

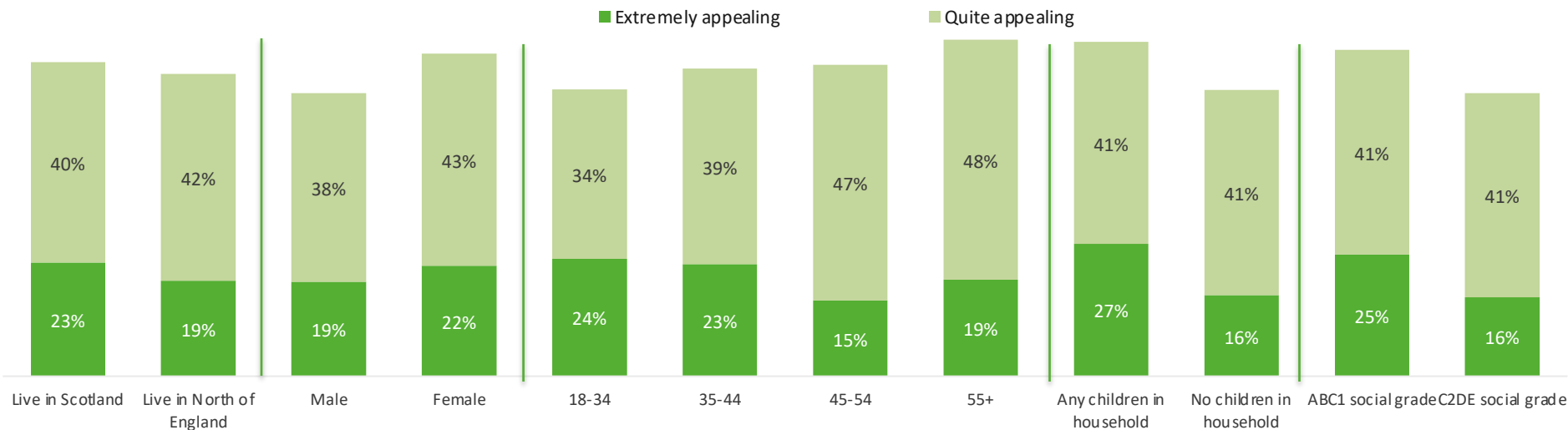


Based on what you know about the following parts of Scotland, please rate how appealing each would be to you as a place to visit for a holiday or short break?

Fife's appeal is higher amongst women, families and members of more affluent social grades

- Presented within the list of other Scottish regions, residents of Scotland were more likely than those living in the North of England to select Fife as 'extremely appealing'. Women, people with children and ABC1s were also more likely to provide this response

Appeal of Fife by place of residence and key demographics



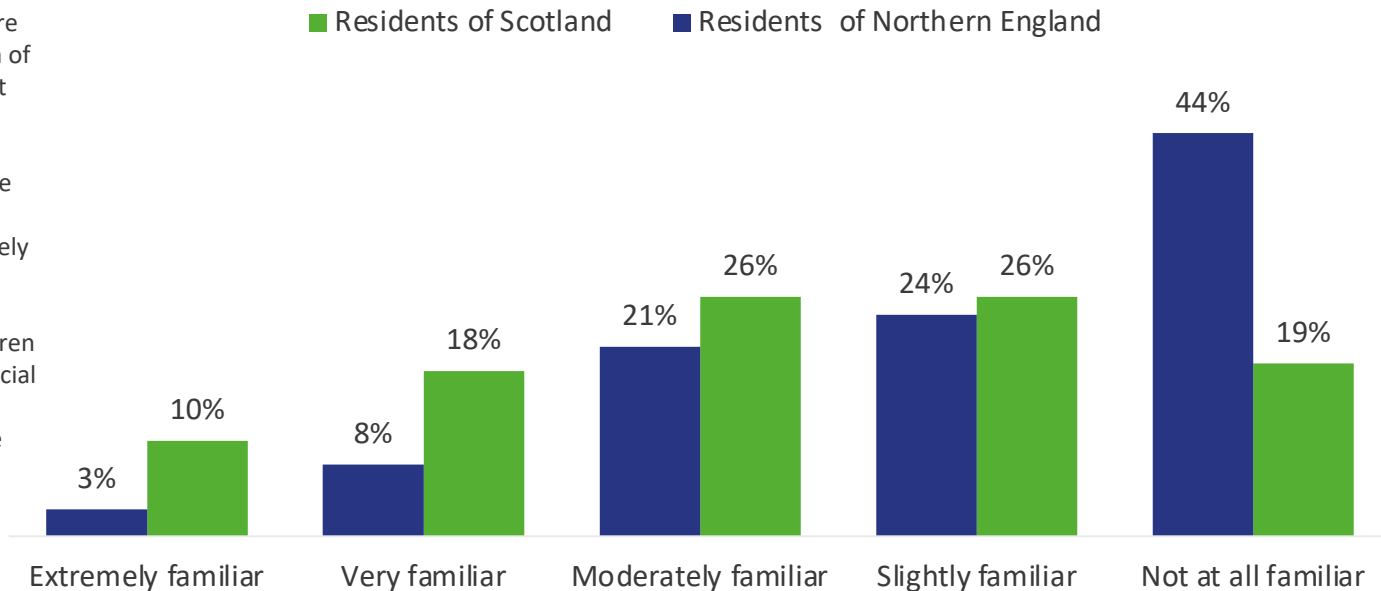
Based on what you know about the following parts of Scotland, please rate how appealing each would be to you as a place to visit for a holiday or short break?

Levels of familiarity with Fife as a holiday or short break destination are fairly low, especially amongst people living in the North of England

- Asked to rate how familiar they are with the area, two thirds of North of England residents were either just 'slightly' or 'not at all' familiar.

- While Scots were more likely to be familiar, only around a quarter provided rating of very or extremely familiar.

- In general men, people with children and members of more affluent social grades were more likely to have a higher level of familiarity with the area.



How familiar are you with Fife as an area to visit on a holiday or short break?

56th
DEGREE
INSIGHT

- [illegible]

Scotland – top 5	North of England – top 5
Beaches	Beautiful
St Andrews	Scenery
Scenery	Golf
Nice	Beach
Golf	St Andrews

"St Andrews mainly and that lovely place in Pitlessie..oh Anstruther too for fish and chips."

"Family holidays, good weather, quaint villages, friendly locals, excellent local food choices, golfing, pottery, art, cottages, the May Isle, Crail, Pittenweem, fish and chips, Penmans steak pies.."

Similar positive associations were discussed in the focus groups with the main focus upon the area's natural assets, heritage and culture

- Associations with Fife were discussed further in the focus groups. Reflecting the relatively low levels of familiarity, some respondents (particular those living in England) had limited awareness of what to expect to find in the area. However as shown below amongst those with a view, the key positive associations related to the outdoors, heritage, local culture and local food and drink.

Beautiful coastline

Fishing Villages
Crail
East Neuk
Beaches
Views

History

The Kingdom of Fife
Castles
Churches
Historic towns

Outdoor activities

Strolls on beaches
Long distance walking routes
Cycling
Camping

Food and drink

Local produce
Fish & Chips
Cafes
Pubs

Local culture

Friendly people
A different accent
Arts festivals

Access

For some Scots the close proximity from home was seen as a appealing (especially young families and to some extent older age groups)

St Andrews(?)

Interesting, historic town
Golf connections
Royal connections
BUT...
Some unclear on St Andrews being in Fife perceiving it as in Tayside!

"We have been looking at doing the Fife Coastal Path, because our main interest is hiking and walking and haven't done, a coastal path for donkeys." **Empty Nester, Scotland**

"It's the Kingdom of Fife, after all. Crail, coastline, East Neuk, music festivals." **Empty Nester, Scotland**

"I heard about a walk in Fife, it's like 400 years old. It's a pilgrim walk that you can do between two cathedrals that are connected. The walk is three, four days long." **Young Independent, North of England**

"I think as I get older, I'd probably want to go there because it's not so far to travel." **Empty Nester, Scotland**

However a number of concerns were also raised, often based upon a lack of clarity over what the area has to offer

Not enough to do

A small area so a fear of running out of things to do.

No major attractions/big town to visit.

Too far

For English market a concern that the area would be hard to reach (a long drive and not accessible by rail?)

Also a broader concern over travel withing the area (slow roads, limited public transport?)

Too close

Conversely, for some Scots residents, the area is too close to consider for an overnight visit.

Also some comments that Fife feels too similar to their own area so of less appeal.

Traditional

While the area's history is a strength, for some the area is perceived as potentially being overly old fashioned or even 'stuffy', perhaps due to links with golf.

Low awareness or overlooked

The area is less appealing to some because they know little about what it has to offer or they have never considered it as destination (e.g. more somewhere they pass through).

Lower on wish list

For some when compared with other UK coastal destinations (e.g. Northumbria, Yorkshire) or other Scottish destinations, Fife is lower down their 'wish' list of places to visit.

"The roads are pretty poor once you get off the main M90...you go through the villages and the speed limits are 20 miles an hour and they're, very narrow and you've got articulated lorries." **Empty Nester, Scotland**

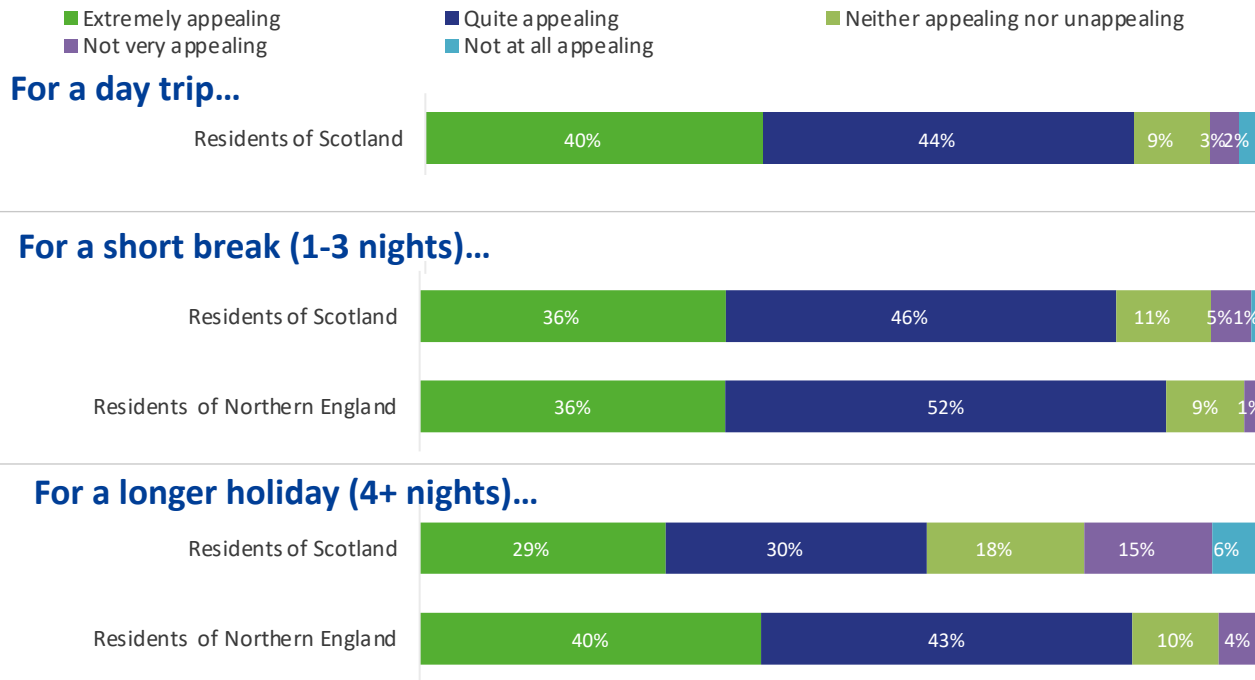
"Just always think of it as a place you travel through to get somewhere else, you know?" **Empty Nester, Scotland**

"It's lower down on my list of places to go when I think of where do I want to go in Scotland?" **Empty Nester, Scotland**

"With St. Andrews don't focus too much on golf because golf is something you either love or hate, For some people, the Pringle sweaters and all that kinda thing is too stuffy and traditional." **Young Family, Scotland**

After seeing the description of Fife, levels of appeal increase significantly, especially amongst those living in the North of England

- In both the survey and focus groups, after providing their unprompted views on Fife, respondents were shown some information about Fife, including a series of images and a description of the area.
- As shown on the right, having seen this information the majority of participants in both Scotland and England rated the area as either 'extremely' or 'quite' appealing.
- Levels of appeal for a short break or longer holiday were highest amongst residents of Northern England.



Given this description and anything you already knew about the area, to what extent does Fife appeal to you as a place to visit for the following types of trip?

Both Scots and residents of Northern England are pleasantly surprised by the images and descriptions of Fife

- After seeing the images and reading the descriptions, views towards Fife were often more positive with some surprised at the variety of landscapes and types of place to visit within Fife. Positive reactions included the following.

Pleasantly surprised

- Larger and more varied than expected
- Longer coastline
- Nearer to Edinburgh than thought
- Some didn't realise St Andrews was in Fife

"It's more beautiful than I thought and quite different. There's so much variety." **Empty Nester, Scotland**

"Oh wow, I wasn't expecting it to be so nice with the beaches and things. It kinda reminds me a little bit of when you go to Skye and you get the fishing and fresh produces." **Young Independent**

The mix of coast, countryside and towns appeal

- The coast appeals most – especially the empty beaches and East Neuk villages
- The combination of types of place described and shown suggests enough to do over a longer trip



East Neuk



Fife Heartlands



Levenmouth



North Fife



St Andrews



Dunfermline & West Fife

Being off the beaten track/ somewhere different from the norm appeals to some

- Compared to other better known coastal destinations such as Northumbria, a similar appeal but without the crowds?

However on discussion, a number of questions over what the area has to offer remain, in particular a risk of there not being enough to do



Location?

- For some Scots a concern that Fife is *too close* for an overnight trip. Importantly this concern exists for some but not all (indeed some prefer close, especially young families and others who like to avoid long journeys)
- For some Northern English, a concern that it is *too far* to travel for a short break but there wouldn't be enough in the area to fill a longer a holiday.

"So how accessible are these places by rail? You know, where's the nearest railway station? Is it easy to go? Have you got to change three or four times?" **"Empty Nester, North of England"**

"It's got a lot going for it but not well promoted. Um, and I think something that's missing is a really good reason to go there." **"Empty Nester, North of England"**

Enough to do?

- Related, some are concerned that the area may not offer enough to do to keep them entertained for more than a few days, especially if weather was poor.
- This concern was greatest amongst families and people from the North of England who had lower expectation over likely weather.

"The fact is it's probably not far enough a way to feel like a, a proper trip. Maybe it's more like a day out kinda place than, you know, a staying over kinda thing." **Young Independent, Scotland**

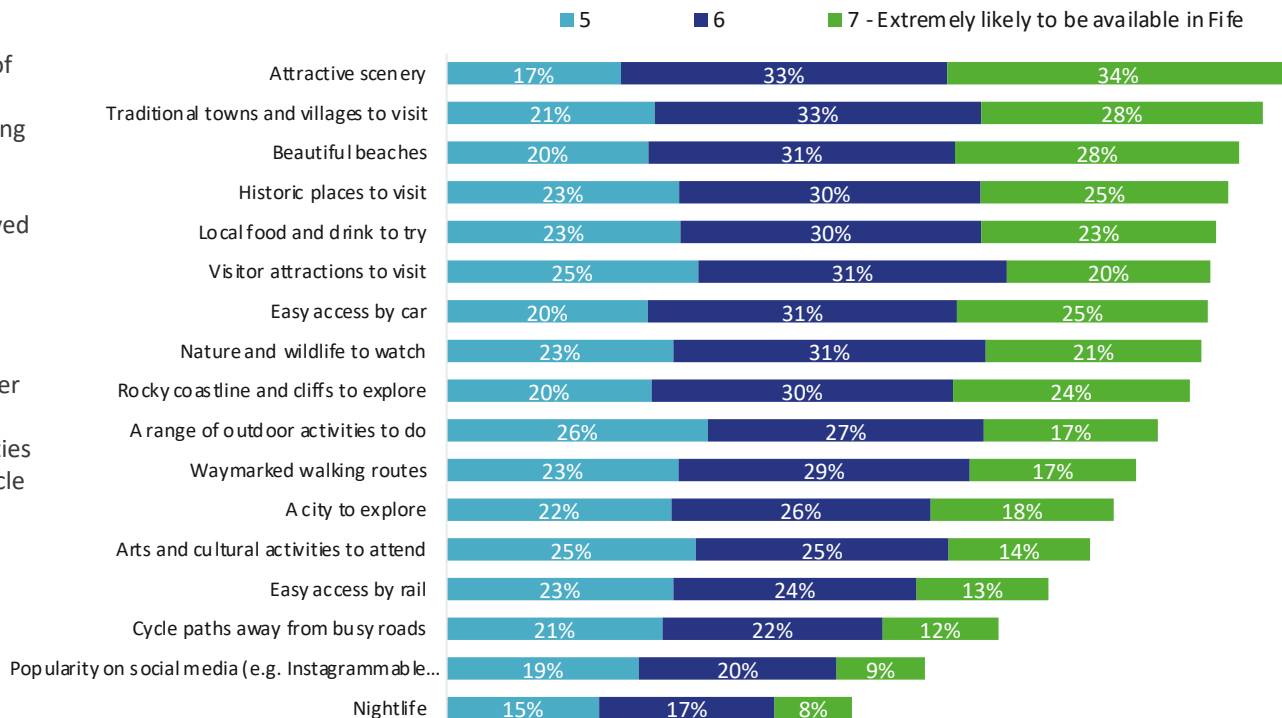
No major attraction/ focal point?

- Some commented that while other comparable areas had a single main attraction or town as its focal point, they felt that this was not the case in Fife.
- Linked to fears over a lack of things to do visiting this area might be 'riskier than going to a better known or tried and tested destination.

There's got to be something you want to go and see like Scara Brae or Edinburgh Castle. In Fife, well there's St. Andrews,, but once you've seen St. Andrews, what else is there?" **"Empty Nester, Scotland"**

Fife is perceived as likely to provide attractive scenery, traditional towns to visit, beautiful beaches, easy access and historic places to visit

- Survey respondents rated a list of aspects on the basis of their likelihood of being available during a visit to Fife.
- Aspects most likely to be perceived as available in Fife included scenery, traditional towns and beautiful beaches.
- However expectations were lower in relation to a number of areas including arts and cultural activities to attend, easy access by rail, cycle paths away from busy roads, popularity on social media and nightlife.



Given any previous experiences you've had of Fife, what you've heard about the area and your general expectations of the area, to what extent do you expect Fife to provide each of the following to visitors?

Comparing the importance of factors in destination choice with perceptions of what Fife has to offer highlights areas of opportunity

- A comparison of the importance of different aspects of a destination (see page 7) with ratings of how well Fife can provide on the same aspects illustrates strengths, where the area is seen as delivering what is important, and aspects which are important but not as likely to be seen as available in Fife.
- These areas may represent the best opportunities for the area's development and promotion and include local food and drink, attractions to visit, easy car access an a city to explore.



Shown descriptions and pictures of different areas within Fife all were seen as appealing, especially St Andrews, North Fife and East Neuk

- Overall, across all of the survey respondents, St Andrews was most likely to appeal however, as shown in the table below, views varied by place of origin with Scots (who tend to feel more familiar with Fife), providing their highest ratings for St Andrews and the East Neuk but lower ratings for other areas.



St Andrews

St Andrews is located on the upper east coast of Fife and is famous for being the home of golf, having Scotland's oldest university and the ruins of the once huge cathedral. The small town has many heritage attractions, eateries, botanical gardens, and a large beach.



Levenmouth

Levenmouth covers the southern central coastal region of Fife. The region benefits from large beaches looking over the forth, golf courses, family activities and historic towns and fishing villages.



Heartlands of Fife

The Heartlands of Fife cover the mid Fife region, including the main towns of Kirkcaldy and Glenrothes. This area includes the Lomond Hills which have popular walking routes as well as many caravan parks, art trails, coastal towns, and villages as well as historic attractions.



East Neuk

The East Neuk covers coastal and inland communities in the far east area of Fife. The area is well known for its picturesque and historic fishing villages. The East Neuk has many beaches and coastal walks as well as museums, heritage attractions and popular eateries.



Dunfermline and West Fife

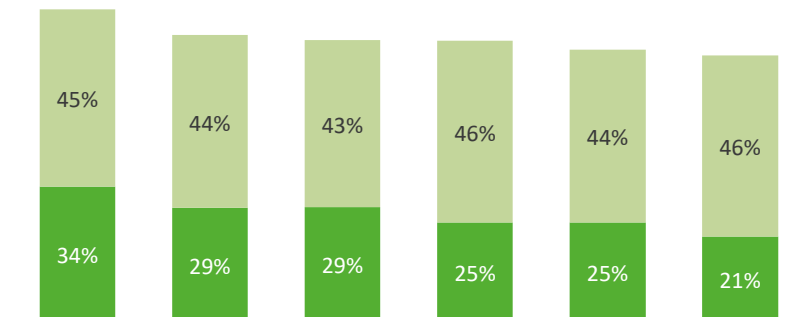
Dunfermline and West Fife covers the city and most southern and westerly points of the region. This region has many historic attractions and coastal villages. The city of Dunfermline has a cathedral and museum attractions. In this region there is also the Forth Bridge, a World Heritage Site.



North Fife

North Fife covers the large central and northern region of the Kingdom including the market town of Cupar. This region has many coastal villages, historic attractions and forest walks. There are also many craft studios, eateries, museums and animal visitor attractions.

■ Extremely appealing ■ Quite appealing



Total appealing:	St Andrews	North Fife	East Neuk	Heartlands of Fife	Levenmouth	Dunfermline and West Fife
Live in Scotland	84%	67%	70%	64%	62%	59%
Live in N. England	75%	78%	73%	78%	75%	75%

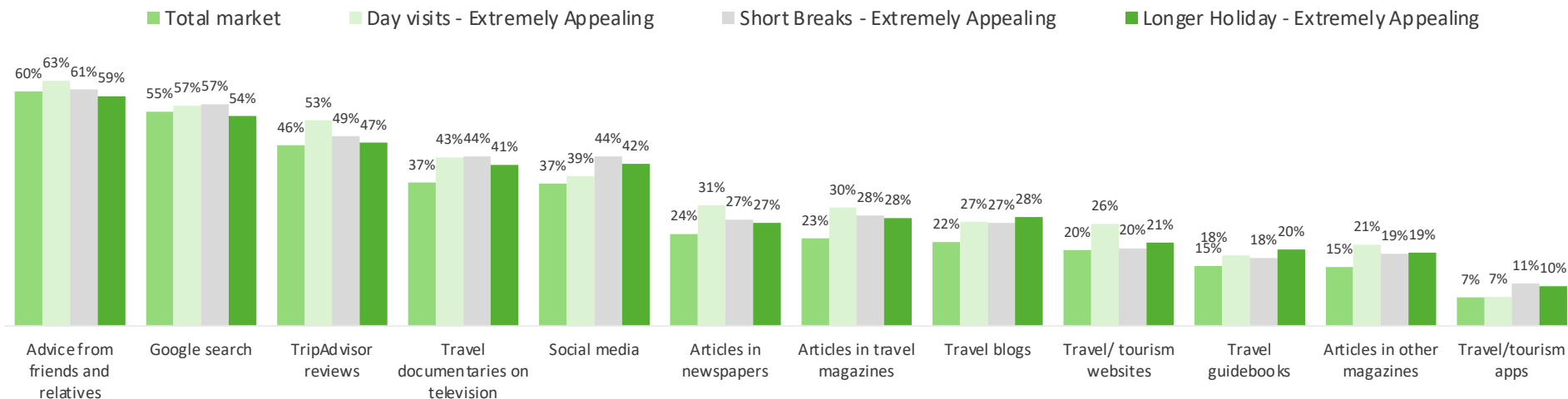
Targeting marketing



While advice from friends and relatives is the main source for holiday inspiration, online sources and TV programmes are also vital

- The chart below compares the sources used when considering and planning UK trips across the overall market with those who stated that Fife is an extremely appealing destination.
- While advice from friends and family are the most important source, in general those who find Fife appealing for short breaks or holidays are more likely than average to use online sources, social media or articles in newspapers or magazines.

Sources use to get inspired or plan days out, short breaks or holidays to UK destinations



Which of the following, if any, do you ever read, look at or watch to find out about, get inspired or plan days out, short breaks or holidays to destination in the UK?

Social media posts and TV shows inspire holiday ideas which are then researched in detail online

- Approaches taken to get inspiration, research and plan short holidays was also discussed in the focus groups.
- Ideas on places to visit or revisit are often gained from friends, sometimes through conversations but more often by seeing photographs in social media posts.
- Other sources discussed included television programmes, with programmes such as property/ home renovation or cookery shows which feature a particular area in the UK referenced.
- Once a destination is in the consumer's mind, they will research online to find out more about what the area has to offer and practicalities such as travel.

"Social media is huge for me. People that I'm friends with go away posting photos and little videos and I think, oh, great, I've been there it's lovely to see it again or right that one's gonna go on my list then. It's Instagram, Facebook, even LinkedIn."
Empty Nester, North of England

"Sometimes on Instagram you get on a social media platform, you'll get like a little snip of a place, like a spa hotel or something and then you might look at that hotel specifically and then look at the surrounding area." **Young Family, Scotland**

"Sometimes I'll just use Tripadvisor or it might even be that there's a deal on Groupon, you know, for different hotels and, and things like that."
Empty Nester, Scotland

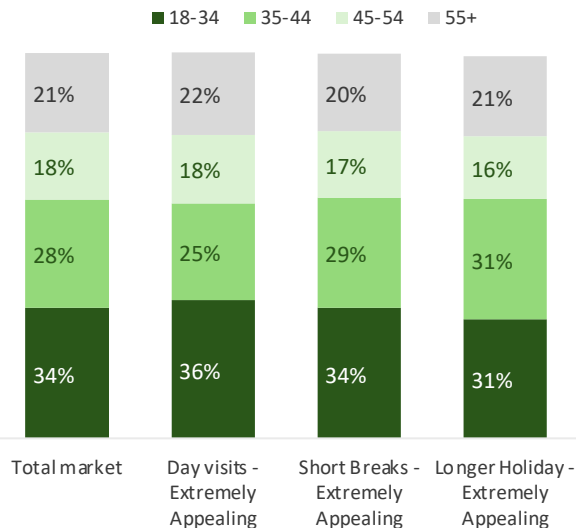
"Hill walking websites are where I mainly go to get ideas and find out about new paths and trails. And I'm a member of the National Trusts..anything that comes up through that I look at as well." **Empty Nester, Scotland**

"I tend to Google places and see what there is to do in the area....see how much it costs for hotels and such, see if there's like free museums and things to go. That's, that's how I make my decision." **Empty Nester, Scotland**

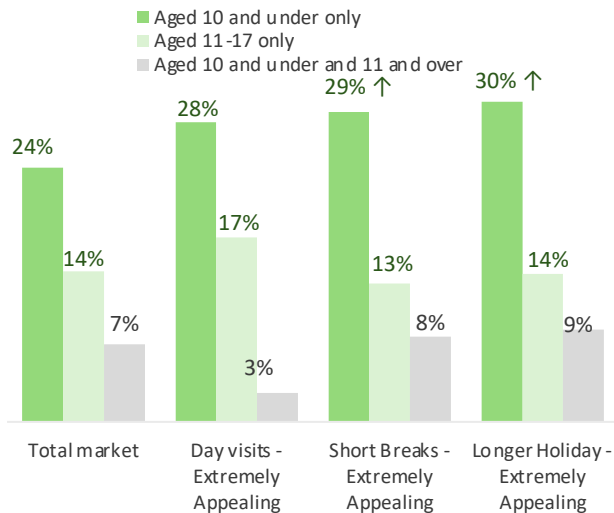
People with children under 11 and in the more affluent social grades are more likely to find Fife an appealing destination option

- By comparing the profile of those who rate Fife as 'extremely appealing' with the overall market it is possible to identify groups most likely to be receptive to marketing.
- As shown below, people who find Fife to be extremely appealing for any of the types covered were more likely to have children aged under 10 and to be in the more affluent social grades.

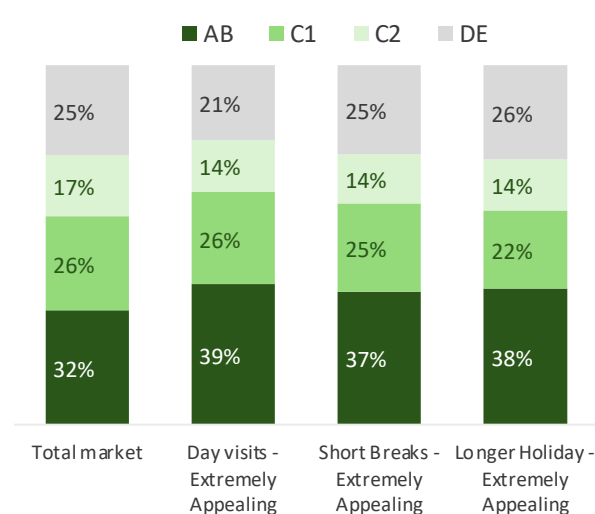
Age



Children at home



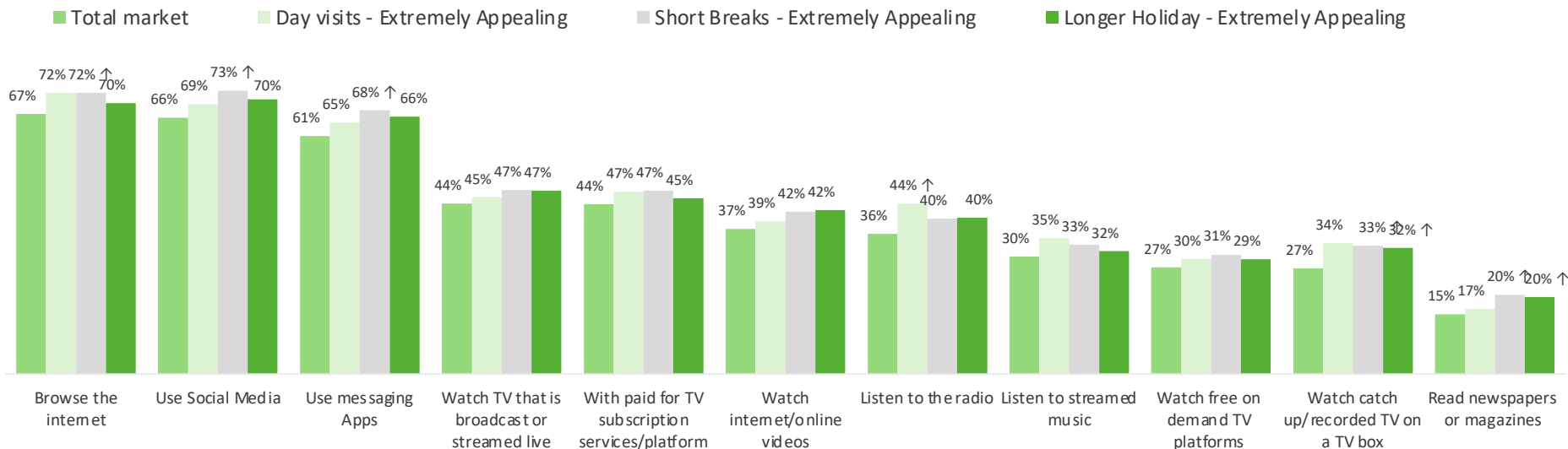
Social grade



Most of the target market who find the area 'extremely appealing' browse the internet every day

- In general those who find Fife appealing tend to use all of the media included more often, in particular potential day visitors are more likely to listen to the radio and potential short break and main holiday takers are more likely than the average to read newspapers and magazines..

Media activities normally do every day

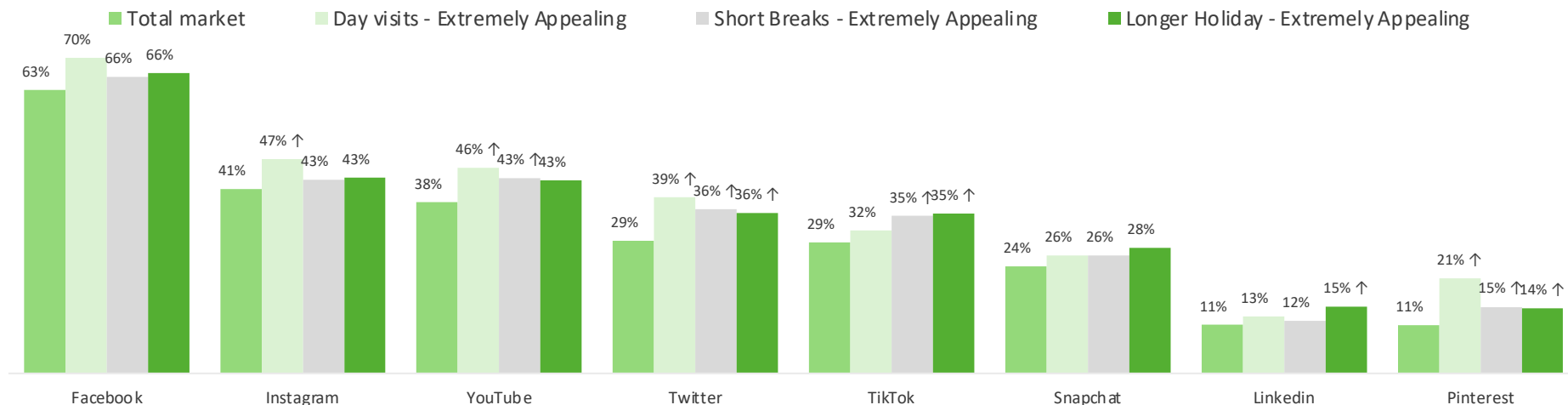


How often do you normally do the following?

Those who use social media are likely to be more frequent users of a number of platforms than 'the norm' including Instagram and YouTube

- 70% of those who find Fife appealing for day visit tend to be use Facebook ever day, a higher percentage that across the overall sample. In general those who find Fife extremely appealing are more likely to use a number of the platforms including Instagram, YouTube and Pinterest

Social platforms use every day



How often do you use the following social media platforms?

Those rating Fife as ‘extremely appealing’ are more likely than average to enjoy quality time with family, eating out, walking and cultural activities

Hobbies and interests

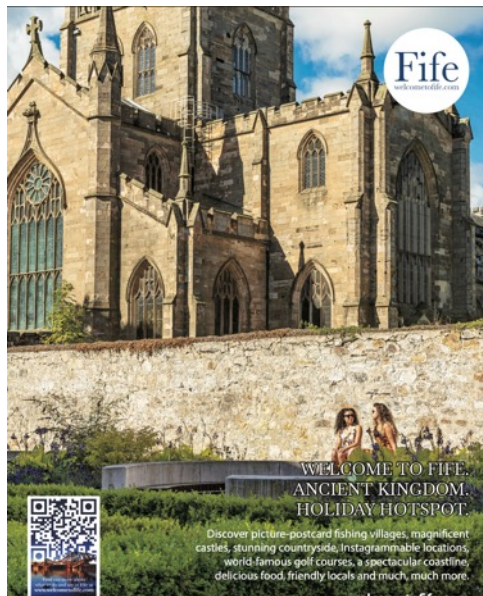
	Total	Day visits ‘extremely appealing’	Short breaks ‘extremely appealing’	Longer holidays ‘extremely appealing’
Watching TV	60%	58%	56%	57%
Listening to music	55%	53%	55%	57%
Days out / sightseeing	53%	63% ↑	62% ↑	56%
Spending quality time with my family	53%	57%	58%	55%
Eating out	52%	54%	56%	54%
Walking / hiking	50%	59% ↑	54%	54%
Travel/holidays	49%	53%	53%	51%
Cooking / baking	46%	44%	48%	49%
Reading books	43%	50%	46%	47%
Shopping	39%	43%	44%	42%
Socialising	36%	41%	41%	40%
Cinema	35%	42%	38%	36%
Social networking / media	33%	34%	38%	36%
Watching videos online	31%	38%	34%	32%
Watching sports	28%	30%	29%	28%
Concerts / gigs / live music	28%	28%	31%	29%

	Total	Day visits ‘extremely appealing’	Short breaks ‘extremely appealing’	Longer holidays ‘extremely appealing’
Keeping fit / going to the gym	26%	28%	27%	26%
Gardening	26%	29%	27%	29%
Gaming (online / video games)	24%	22%	25%	24%
Nights out to bars / clubs	24%	27%	25%	26%
Theatre/ Art galleries	23%	29%	30% ↑	30% ↑
DIY	23%	26%	24%	23%
Camping / outdoor pursuits	21%	25%	24%	24%
Festivals	19%	25%	23%	23%
Photography	18%	22%	20%	21%
Crafting/sewing/knitting etc.	16%	18%	19%	19%
Playing sports	16%	14%	19%	18%
Painting / drawing	12%	13%	13%	17% ↑
Singing / playing an instrument	11%	9%	13%	12%
Writing / blogging	10%	16% ↑	13% ↑	14% ↑

Which of the following are hobbies and interests that you enjoy regularly?

Advertising needs to make the most of Fife's natural assets with distinctive images

- A series of adverts were shared in the focus groups to gain feedback. Both of the images below received fairly negative feedback, especially in relation to the images used with the pictures of the areas shown earlier in the discussion felt to be much more appealing.



- 👍 Kingdom of Fife reference
- 👍 Short description of area
- 👍 QR code
- 👎 Image – far too generic, could be anywhere, unappealing
- 👎 Reinforces traditional perceptions
- 👎 Not relatable

"I like the kingdom. I think that sounds fabulous. The Kingdom of Fife." **Young Family, North of England**



- 👍 Large web address
- 👍 Sunshine
- 👎 Image – too generic, could be anywhere, unappealing
- 👎 Reinforces traditional perceptions
- 👎 Too much text – in general would not read

"It doesn't grab my attention personally. I think maybe 'cause it's just got too much text in the middle." **Young Family, Scotland**

"Every once in a while, when I'm sitting down, maybe waiting to go at the dentist, I'd look at something like this." **Young Independent, North of England**

The winter advert was generally liked more than the others due to the wider range of images used including people enjoying themselves



- 👍 Variety of appealing images
- 👍 Modern
- 👍 Appealing to younger age groups (more relatable)
- 👎 Not for families?

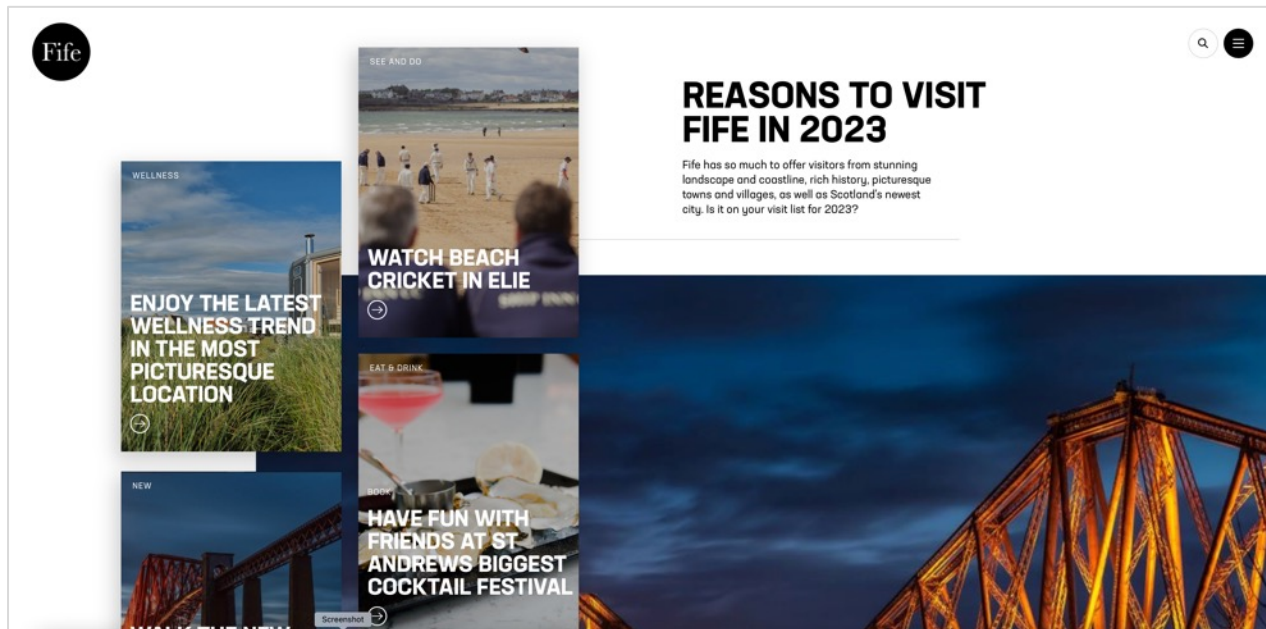
"That's much more appealing. It's got the big pictures, it's got the website that's big enough and it's got enough words that you can read but not be like pages and pages." Young Family, North of England

Feedback on the website was predominantly positive both in terms of the 'look and feel' and the usefulness of content

- 👍 Well designed
- 👍 Great photography
- 👍 Modern
- 👍 Varied content – something for everyone
- 👍 Inspiring
- 👍 Like the lists 'top 10' etc.
- 👎 Looks a little tricky to navigate
- 👎 Looks a little too premium/ expensive?

*"it's definitely a lot more eye-catching than all the adverts. First thing you see is a luxury picture, so you're kind of thinking you're gonna get really nice accommodation, there's a bit of scenery and then you start to then start to see that there's actually quite a lot of stuff to do...: **Young Family, Scotland***

*"It's really nice website. It's well laid out."
Young Independent, North of England*



Conclusions and recommendations



Summary – for discussion

- **Raise awareness** – a key issue for all markets is a lack of appreciation of what is in the area – this ranges from almost no knowledge at all (esp. North of England) to knowledge of some but not all aspects (esp. Scots) but once consumers hear more about the area appeal increases greatly.
- **Capitalise on the area's strengths in communications** – after seeing images and descriptions of Fife in the survey and focus groups levels of interest increased greatly but feedback on some of the recent advertising was fairly negative. Communications need to promote the aspects of greatest importance to visitors – escape, fun, scenery, local food and cities, towns and villages to explore. Use the 'Kingdom' label.
- **Focus on best prospect markets with targetter messaging** – key markets include young families (including those who are happy to take breaks close to home) and people without children drawn by activities such as walking and cycling routes or cultural events. Target communications to these groups with reassurance on the range of activities available, including wet weather options.
- **Promotion of the area's appeals need to be supported by information to address practical concerns** - e.g. around access to the area, travel within the area (including rail links), amenities, things to do and suggested itineraries. Media like short videos/ blogs could be used to effectively communicate this information in a way that reassures those with concerns. The current website is well liked but needs to reach more people. The use of emerging new AI sources such as Chat GPT should also be kept in mind.
- **A stronger positioning of St Andrews** – there is uncertainty over whether St Andrews is in Fife for some and/or some are concerned that it is somewhere just for golfers. Promoting St Andrews more as part of the offer could help to address the feeling some have of the area not offering enough to do or lacking a focal point. Similarly Dunfermline with its new city status provides a potential focal point for the West of the region.
- **Make more of proximity to Edinburgh** – in particular potential visitors from the North of England would be interested in a longer holiday which combines the rural and coastal offer in Fife with time in Edinburgh. The quick links between the areas should be promoted.



Any questions? A follow-up discussion?

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