



Fife

Tourism
Strategy
2023- 2030

Fife Tourism Strategy

2023 – 2030

Vision

By 2030 the Kingdom of Fife will be a world class visitor destination known for being a leader in sustainable tourism, and renowned for the warm welcome visitors receive. Fife will be a venue for major events, and a first-choice destination renowned for its variety of offering including stunning scenery, relaxing escapes, cultural attractions & experiences, outdoor activities, and excellent local food & drink.

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Introduction

Tourism is a key sector in the Fife Economy. In the year prior to the Covid pandemic (2019), the Kingdom of Fife attracted 2.795 million visitors. These visitors generated a total economic impact of £357.09m and supported 5,487 FTE jobs. The pandemic hit the tourism industry hard, however recovery in tourism has been steady and Fife is now in a good position and looking forward to further growth in the sector. 2022 figures show that visitor figures have almost returned to pre-pandemic levels with 2.706 million visitors, and the 150th Open at St Andrews helped towards a total economic impact of £450.03m (up 26% compared to 2019). Tourism supported 5,541 FTE jobs in 2022. Throughout the pandemic the sector worked hard to cope with domestic tourism, ensuring that there was an infrastructure that could cope with increased level of traffic to popular destinations, and provision for the rise in popularity of motor homes.

Fife has an excellent and diverse business base contributing to the visitor economy. There is a wide variety of things to see and do – this variety being one of the key strengths of the area. The Welcome to Fife consumer facing brand is reaching new heights of engagement, and the Local Tourism Associations are attracting new members and are vital for driving activity and promotion at a local level. However, visitor expectations and needs have changed since before the pandemic, with a greater demand for sustainability, wellness, relaxation and bookable experiences unique to the destination, and we must adapt our offering to meet these needs.

Where do we want to be? This strategy aims to ensure that there is a quality tourism offering right across Fife, and throughout the year. Through Welcome to Fife we will increase awareness of Fife as a first-class visitor destination, developing opportunities for visitors to experience the ‘real’ Fife, and to live like a local through authentic and unique experiences. We will ensure that the tourism sector is leading the way on working towards local and national sustainability ambitions, and that the sector benefits from increased digital capability and use of innovation in visitor information and experiences.

The aims and objectives of this strategy will be met by an increased market awareness and focus on target markets, greater collaboration across the sector, digital transformation, product development, and a drive to support businesses to recruit new people into the industry. As the tourism sector continues to adapt to new challenges and change, the strategy will remain flexible, taking into account customer expectations, trends and national policies.

Strategic Context

This tourism strategy supports the aims of national and regional strategies including:

Outlook 2030 – the national commitment to the future of Scottish tourism. An Industry Leadership Group was formed in 2022 to deliver the aims of Outlook 2030, under 4 key priorities – our passionate people, our thriving places, our diverse businesses and our memorable experiences.

[Scotland-Outlook-2030.pdf \(scottishtourismalliance.co.uk\)](https://www.scottishtourismalliance.co.uk/Scotland-Outlook-2030.pdf)

Fife Economic Strategy 2023-30 – This strategy sets out the approach Fife Council will take to promote inclusive and sustainable economic recovery, growth and resilience in Fife.

This will be achieved through three priorities:

1. Supporting Businesses
2. Investing in Business Premises & Infrastructure
3. Delivering Skills, Training & Fair Employment

Tourism is seen as being a priority sector for Fife, and the growth of tourism is integrated into these priorities.

Who are our Visitors?

The report, Fife Tourism: Identifying Growth Opportunities was published in April 2023. This report was commissioned by Fife Council to establish who Fife's potential visitors are from across Scotland and the North of England and their characteristics, how consumers perceive Fife, how potential visitor attitudes are changing and what actions need to be taken to achieve growth ambitions. The following points show a summary of the findings:

- **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 to knowledge of some but not all aspects but once consumers hear more about the area appeal increased greatly.
- **Capitalise on the area's strengths in communication** – after seeing images and descriptions of Fife levels of interest increased greatly. Communications need to promote the aspects of greatest importance to visitors – escape, fun, scenery, local food, and cities, towns & villages to explore. The 'Kingdom' label should be used to set Fife apart from other areas.
- **Focus on best prospect markets with targeted messaging** – key markets include young families 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 appeal need to be supported by information to address practical concerns** – e.g around access to the area, travel within the area, 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.
- **A stronger positioning of St Andrews** – there is uncertainty over whether St Andrews is in Fife. 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.

These findings will inform future Welcome to Fife action plan and marketing activity, with a view to addressing the issues raised and creating more awareness of Fife as a destination for visitors from across Scotland and the North of England.

From this research we have identified the following VisitScotland market segments as our target markets:

- **Engaged Sightseers** – A love of holidays drive Engaged Sightseers to plan numerous breaks in a year. They enjoy general sightseeing and touring, taking in historical places as well as scenery and nature. They relish engaging with friendly locals and seeking out an authentic experience.
- **Food Loving Culturists** – Food Loving Culturists will seek out a relaxing holiday experience where they can enjoy short breaks in the UK and will recommend quality experiences when their host has gone the 'extra mile'.
- **Natural Advocates** – Natural Advocates are passionate about Scotland as it offers everything they want from a holiday; breathtaking scenery, a connection with nature and the chance to get away from it all. A holiday in Scotland will really help them to unwind, recharge and enjoy quiet time.

In addition, we will have a particular focus on young families and retired people, as the visitor type most likely to want to visit Fife.

Consumer trends

Since the pandemic, there has been a shift in what consumers want/expect from their holiday and destination. Some of the habits that were necessary when travelling was restricted have remained and look like they will be long term trends. Recent research has identified the following trends, which will inform Welcome to Fife campaigns, and the positioning of Fife as a visitor destination:

- People travelling less but travelling 'better' – more staycations, less flights. People only using flights for one holiday per year and looking for other methods of travel including rail.
- Wellness, relaxation, outdoor activities and getting away from it all. During lockdown, individuals and families made changes to their normal behaviours and lifestyle which have continued into a post-Covid landscape, including the need for open space, clean air, better diets, more exercise, relaxation and 'digital detox'.
- Personalisation, unique and premium experiences, which could include meet the locals and meet the maker experiences, behind the scenes exclusive views, first look opportunities and added value experiences.
- Environmental sustainability and responsible tourism, to protect destinations for the future. This varies by market, for instance, North American tour operators are seeing a switch to single country itineraries, supporting slow tourism and allowing clients to immerse themselves in one destination. German consumers see the sustainability of their holiday as important, for instance not using single use plastics during their visit.
- Affordability and value for money – the demand for unique experiences is balanced against household finances being under strain. Visitors wish to treat themselves but this does not necessarily have to be expensive. This is supporting demand for shoulder and off-season breaks for visitors unable to pay high season prices.

- Planning itineraries / booking experiences in advance, and curated holidays. Visitors are booking in a shorter time frame than before the pandemic, but when they do book, they prefer to have plans made in advance, including bookings for all experiences, rather than being impulsive or waiting to see what the destination has to offer.
- Going Digital – visitor information, online booking, flexible booking and automated processes. During the pandemic, businesses relied heavily on online booking and payment systems. Consumers now see this as the norm, as long as it is quick, easy to use and offers flexibility.

Aims

The aims of this strategy are to ensure that potential visitors are aware of Fife and everything it has to offer, that visitors have the best possible experience in Fife, encouraging longer and repeat visits, and to ensure that businesses have the support they need to grow and thrive in the current economic landscape. We will do this by working with businesses, partners and stakeholders to:

- Provide a warm welcome to all visitors.
- Ensure that visitors have a positive experience throughout their visit which exceeds expectations.
- Ensure that all businesses have the tools/knowledge/experience they need to provide visitors with a positive experience.
- Provide good value, authentic experiences for visitors, encouraging them to immerse themselves in Fife culture, and to 'live like a local'.
- Focus on extending the visitor season with a particular focus on the shoulder months
- Ensure that sustainability is at the forefront of everything we do, contributing to Fife Council's climate change ambitions, and ensuring that the Fife tourism industry is inclusive and accessible.
- Become a visitor destination known for its digital capability in terms of visitor information, experiences, and support for businesses to develop digital solutions to help them grow and thrive.

Strategic Priorities

1. Place

Creating a sense of place is vital in building a successful visitor destination. When making a choice of where to take a holiday or short break, potential visitors need to know what differentiates one destination over another. Through consistent messaging by all partners, Fife can increase its profile as a destination with plenty to do and see. Using 'Kingdom of Fife' messaging sets Fife apart from other areas, and creates a unique identity. Development of this sense of place will be achieved through:

- **Destination development and infrastructure** – ensuring that local communities have a clear and well established visitor proposition, a strong sense of identity, and the required level of facilities and infrastructure to create a first class experience for visitors.
- **Product development and experiences** – working with partners, businesses and stakeholders to build a strong and varied visitor offering, encouraging collaboration and innovation to create memorable experiences and products to suit both individual travellers and the travel trade market.
- **Marketing / promotion / information** – creating engaging, consistent campaigns directed at our target markets, building awareness of the Kingdom of Fife as a visitor destination, and ensuring that visitors have all the information they need to inspire them, both prior to arrival, and whilst they are here.
- **Events / venues** – working with partners to develop and sustain an exciting programme of events throughout the year, with a focus on attracting participants from outwith Fife.

The delivery plan for this priority includes:

Destination development and infrastructure

- Develop Dunfermline as a city break destination.
- Deliver the tourism action plan for Levenmouth, and a visitor marketing plan for the opening of the Leven rail link in spring 2024.
- Ensure Fife has adequate infrastructure for visitors, including toilets, motorhome facilities and active travel options. Work in partnership with Fife Coast and Countryside Trust on infrastructure development including Rural Tourism Infrastructure Funded projects, and the promotion of responsible tourism practices in terms of, for example, waste management.
- Work with partners to facilitate filming opportunities in Fife, and to promote filming locations of interest to visitors, building this into our key messaging where appropriate.
- Work with OnFife and other partners to develop a strong cultural and heritage tourism offering in Fife, telling the 'story' of the Kingdom in a strong and consistent way.

Product development and experiences

- Work with businesses and communities to offer unique, authentic and memorable experiences for visitors.
- Work with businesses to engage with travel trade, building itineraries and bookable experiences for group travel and FIT markets.
- Work with Cruise Forth to develop itineraries and unique experiences to encourage cruise excursion companies and individual passengers from cruises docked at Rosyth and other ports along the Forth to explore Fife.
- Encourage businesses to collaborate on joint visitor offerings, which may include joint ticketing, visitor offers and/or loyalty schemes.
- Encourage businesses to use local produce wherever possible and to develop local food and drink experiences. Create compelling content to promote local food and drink in partnership with Food from Fife.
- Develop the agritourism offering in Fife by encouraging and supporting agriculture businesses to introduce or increase a visitor offering including farm shops, farm experiences and/or visitor accommodation.

Marketing / promotion / information

- Consolidate the 'Welcome to Fife' consumer facing brand, and 'Fife Tourism Partnership' business facing brand into a single brand identity, with the Fife Tourism Partnership Board becoming the Welcome to Fife Board.
- Through strong brand guidelines and toolkits ensure there is consistent messaging and that everyone is talking about Fife in the same way.
- Ensure visitors have access to inspiring destination information pre and post arrival, including the use of innovative digital channels.
- Deliver compelling Welcome to Fife domestic marketing campaigns, tailored to our target markets, using above and below the line marketing channels, to create a sense of place and to encourage visitors to 'live like a local'.
- Have a particular focus on campaigns to bring visitors to Fife through the autumn/winter/spring.
- Support the golf sector through joint promotional activity with Fife Golf to attract golfers to Fife, and to extend their stay by promoting other aspects of the Fife offering, including things to see and do, and places to eat.
- Work in partnership with VisitScotland to embed Fife messaging into national and international visitor campaigns.

Events / venues

- Work with local venues and events organisers to host large events which will bring significant numbers of visitors from outwith Fife, driving up overnight stays and creating positive economic impact.
- Work with national agencies and events organisers to bring national events to Fife.
- Work with Fife Golf and VisitScotland to attract golf events to Fife and to maximise the economic potential of these events which have international importance.
- Utilise winter events and festivals as a way to reduce the impact of seasonality.
- Review the Strategic Events Fund and work with events organisers to maximise the growth potential of their events.

2. People

It has been well documented that the tourism and hospitality sector has struggled to attract and retain staff over the past few years, and that staff and skills shortages provide a significant barrier to growth. We want to position tourism as an attractive choice of career, ensure that people seeking employment have the skills required by employers, that employers have the opportunity to streamline processes in order to reduce the burden on employees and that our businesses have safe, nurturing environments for staff. This will be achieved through:

- **Skills/career development** – through the delivery of the tourism skills group action plan, positioning tourism as a career of choice.
- **Fair work practices** – encouraging businesses to incorporate fair working practices into their business.
- **WorldHost** – Delivering a continuing programme of WorldHost customer service training to ensure that visitors receive the highest possible levels of service.

The delivery plan for this priority includes:

Skills / careers

- Through the tourism skills group, deliver an action plan to promote tourism as a career of choice, provide opportunities for young people to experience jobs in the sector, and ensure that careers in the industry are accessible to all, including adult returners, those with disabilities and the refugee community.

Fair work

- Work with tourism and hospitality businesses to assist in incorporating fair working practices into their business, including the living wage, reduction of unsociable hours wherever possible, support to get to/from work, and a 'quiet and calm' policy.

WorldHost

- Work with partners to deliver World Host customer service training to businesses, and to ensure that staff have an excellent understanding of the tourism offering across Fife.

3. Businesses

The success of the Fife tourism industry depends on having a base of resilient, ambitious and innovative businesses that can thrive in what can often be a difficult operating environment. Engaging with, and supporting our businesses is key to sector growth. We will do this by:

- **Support** – providing businesses with opportunities to learn, network and have access to insights to help them adapt to current market conditions. Encourage new entrants to the sector and work with partners to attract inward investment.
- **Collaborative working** – working with regional partners on joint initiatives to develop the East of Scotland visitor economy, and develop sector specific support opportunities in line with our target markets.
- **Digital** – ensuring that businesses have the digital capability required to streamline processes and meet customer expectations.

The delivery plan for this priority includes:

Support

- Continue a programme of business engagement, encouraging businesses to get involved with their Local Tourism Association and Welcome to Fife activity, and highlighting the support available to them.
- Support the six industry-led Local Tourism Associations through funding, membership building, local strategy development and activity support. Ensure that Welcome to Fife activity represents all LTA areas.
- Provide a programme of networking events and familiarisation trips for local businesses, to encourage collaboration and increase knowledge of the wider tourism offering in Fife.
- Deliver a biennial tourism conference as a forum for businesses to learn about and discuss current policy and trends.
- Inform and guide tourism businesses with regards to national policy and legislation, and be the voice of the industry through national bodies such as the Scottish Local Authorities Economic Development (SLAED) tourism group and Scottish Tourism Alliance (STA).
- Compile and disseminate tourism data, including STEAM data, and the results of local and national research and visitor surveys.
- Work with Invest in Fife on inward investment enquiries related to tourism.
- Work with Business Gateway on the referral of tourism businesses eligible for support, and to ensure tourism businesses have access to suitable training and learning opportunities.

Collaborative working

- Support and facilitate sector specific working groups including the sustainability group, accessibility group and the formation of other groups to develop our key strengths, e.g outdoors, heritage.
- Continue to work with Tay Cities partners on the Tay Country campaign, focusing on travel trade and business support in the North of Fife. Continue to look for opportunities for tourism businesses through the Tay City Deal, including digital and skills opportunities.
- Work with partners to deliver the aims and ambitions of the Edinburgh & South East Scotland Regional Prosperity Framework Visitor Economy and Culture programme in Mid/South Fife.

- Work with businesses to introduce new digital technology into their business which will streamline operations, help with staffing shortages, assist with promotion / online booking and grow the visitor offering.

4. Sustainable Tourism

A much greater emphasis on sustainability and responsible tourism is the biggest shift in global tourism priorities since before the pandemic. Local Authorities, industry bodies and stakeholders have their own climate change targets to meet which in turn makes businesses think about their sustainability goals. This is not wholly environmental sustainability, but social and economic as well. Visitors have higher needs and expectations which must be met in order for a destination to remain competitive. We will ensure that Fife retains that competitive edge by:

- **Environmental sustainability** – delivering the Fife Sustainable Tourism Action Plan and promote responsible tourism practices.
- **Transport** – facilitating the use of active travel options for visitors in Fife, and make this option as easy to access as possible.
- **Community Wealth Building** – Working with communities and localities to develop their own tourism offering, and to develop community run facilities.
- **Accessibility** – Positioning Fife as an inclusive and accessible destination.

The delivery plan for this priority includes:

Environmental sustainability

- We will develop and deliver responsible tourism campaigns and messaging including involvement in national VisitScotland campaigns, and joint working with Fife Coast and Countryside Trust.
- Through the tourism sustainability group we will sign the Glasgow Declaration on Climate Action in Tourism, and deliver the Fife Sustainable Tourism Action Plan.
- The thread of sustainable tourism will run through everything we do, helping businesses to work towards local and national sustainability ambitions, using key messaging and promotion to extend the visitor season, and encouraging active travel wherever possible.

Transport

- Encourage visitors to use active travel options whilst in Fife, including walking, cycling and the use of public transport.
- Promote sustainable transport options for the Fife 191 route.
- Undertake a feasibility study looking at transport options for visitors, including flexi bus options, and transfer services for walkers of the Fife Coastal Path and Pilgrim Way.

Community Wealth Building / Community Tourism

- We will work with communities and localities to develop their own tourism offering, encouraging visitors to 'live like a local' through storytelling and the development of unique and authentic experiences, enabling visitors to learn not just the history and heritage of Fife's communities, but also a more contemporary view of Fife and the people who live here.
- We will work with partners, such as SCOTO (Scottish Community Tourism), to maximise the opportunities offered through community-led tourism.

Accessibility

- Fife will be positioned as an inclusive and accessible destination, highlighting the range of accessible locations, activities and accommodation available in the area, and also encouraging accessibility and inclusivity in employment.

Measuring Success

Data Sources

Welcome to Fife subscribes to STEAM (Scottish Tourism Economic Activity Monitor) and the Moffat Centre Visitor Attraction Monitor. From this, success can be measured by an increase in the following metrics:

- Visitor numbers
- Visitor nights
- Economic Impact
- FTE Employment
- Average length of stay
- Distribution of visitor numbers throughout the year
- Type of accommodation
- Events attendance

We are aiming for a target of a 2% annual increase in visitor numbers and economic impact. This increase will be across the year, with a specific push to bring more visitors to Fife in the traditional off peak season. We are aiming to increase the average length of stay from 2.2 days to 2.8 days over the duration of the strategy.

We will work closely with partners to achieve a steady increase in the number of people employed in the sector, encouraging new entrants to the workforce and upskilling within businesses.

In addition, VisitScotland carries out periodic visitor surveys to establish customer satisfaction which may include Fife specific data.

To measure the impact the strategy has on businesses, we report the following KPIs to SLAED:

- Businesses listed on Welcome to Fife
- Businesses supported
- Business attendance at events

In addition to this, we will continue to explore other data sources that will help to monitor progress e.g town footfall counters which can gather data on dwell time and granular catchment.

Tourism Action Plan

Welcome to Fife has an annual action plan which is monitored regularly to measure progress and outcomes. This is reported on quarterly to the Welcome to Fife Board and annually to Fife Council.