

ST ANDREWS KEY TOURISM FACTS & FIGURES



A REFERENCE GUIDE FOR BUSINESSES

WELCOME



Welcome to **St Andrews – Key Tourism Facts & Figures**, published by St Andrews Partnership with support from Scottish Enterprise.

This guide summarises the most up-to-date tourism survey data available about St Andrews and draws on a wide range of relevant studies and reports.

The guide is aimed at tourism-related businesses and others with an interest in the destination. It is designed to help improve knowledge about current and prospective visitor markets to the town. We also hope it will assist in building a greater understanding of how those involved in tourism can make the most of market opportunities and help enhance St Andrews' reputation as one of Scotland's leading visitor destinations.

For more information visit the Research section on the St Andrews Partnership website at www.visitstandrews.com/b2b

CONTENTS

Section 1St Andrews in Context4Section 2Visitor Profile5Section 3Tourism Expenditure10Section 4Accommodation11Section 5Leisure Tourism14Section 6Golf21Section 7Business Tourism25Section 8University of St Andrews27

SECTION 1 ST ANDREWS IN CONTEXT

St Andrews is regarded as one of Scotland's finest towns and is one of the UK's leading visitor destinations. Its status as the international 'Home of Golf', along with the reputation of its historic University, mean it is also one of only a handful of places in Scotland that is genuinely recognised across the world.

A large number of tourism and hospitality businesses thrive in and around the town. St Andrews enjoys a very good reputation for the high quality of its visitor accommodation, shopping and dining, its fine coastal setting and its general ambience.

St Andrews has also been named as one of the *"best places to live"* by The Sunday Times.

"Royal connections have boosted the University's appeal, and with affluent students come the kinds of bars, restaurants and shops normally found in the capital. Throw in the coastline and golf courses and St Andrews becomes a seriously attractive place to live."

The Sunday Times Best Places to Live Guide, March 2014

ST. ANDREWS HAS A RESIDENT POPULATION OF 16,900

(2011 census)



people are **employed** in St Andrews.

(Economic Impact of the University of St Andrews 2011-12)



The **education sector** is the major local employer, with **37%** of the workforce.

(Economic Impact of the University of St Andrews 2011-12)



The **tourism sector** employs **29%** of the workforce, making it by some distance the second most important economic sector in St Andrews.

(Economic Impact of the University of St Andrews 2011-12)



Earnings in St Andrews are on average **20%** higher than in other parts of Fife.

(St Andrews Hotel Opportunities 2012)

SECTION 2 VISITOR PROFILE

St Andrews attracts many different types of visitors:

- Visitors on a day trip from other parts of Scotland
- UK holidaymakers on a short break to the town
- Overseas visitors staying in St Andrews as part of a longer holiday in Scotland
- Friends, family and alumni from the University
- Golfers, and people attending golf events
- Business delegates attending a conference or meeting in the town.

Most overnight visitors to the town are from the UK and are visiting

St Andrews for a short leisure break. Predominantly, they tend to be mature couples, travelling without children.

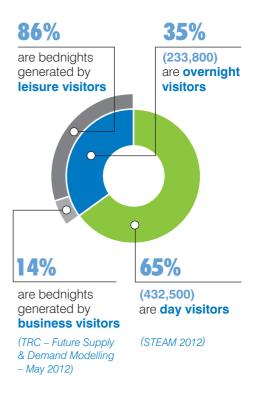
"My business comes from a number of key markets. 40% is golf-related, 20% comes through the University in one way or another, 15% comes from leisure visitors, a further 15% is business tourism-related, and 10% is generated by the weddings market".

Ray Pead, Owner, Glenderran Guest House

ST. ANDREWS ATTRACTS 666,300 VISITORS PER ANNUM

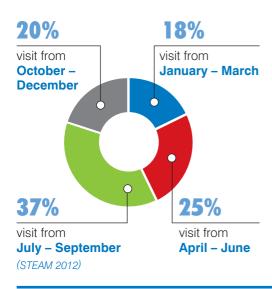
(STEAM 2012)

It is estimated that just over **1 MILLION BEDNIGHTS PER ANNUM** are sold in St Andrews.



WHEN VISITORS COME

St Andrews is a year-round destination, although most people choose to visit between April-September.



"The Fairmont enjoys good levels of year-round leisure business, with the Scottish market particularly important over the winter months. Events and festivals are vital in helping us develop packages aimed at this short leisure breaks market."

Robert Glashan, General Manager, Fairmont St Andrews

TOP TIP

• Think creatively about how you could attract more off-season business with added value or special offers.

WHERE VISITORS STAY

Of those staying in commercial accommodation:

40% (413,000)

of bednights are spent in **serviced accommodation** (hotels, guest houses or B&Bs)



27% (272,000)

of bednights are spent in **self-catering** accommodation



33% (340,000)

of bednights are spent in **caravan holiday homes**



(TRC Future Supply & Demand Modelling – May 2012)

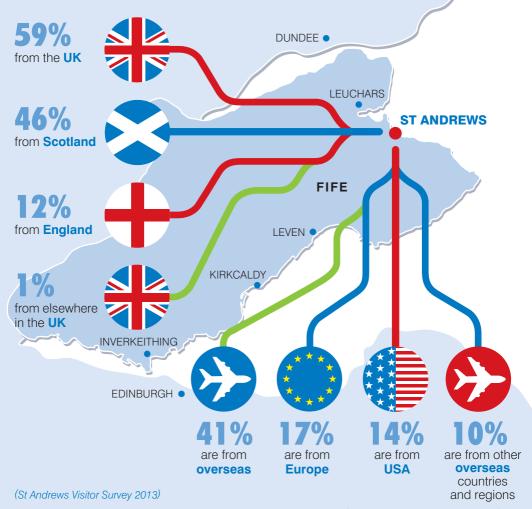
Over half of all visitors who stay overnight in St Andrews stay for 1 TO 3 NIGHTS (St Andrews Visitor Survey 2013)

TOP TIP

 Could you collaborate with other like-minded businesses to encourage visitors to extend their stay?

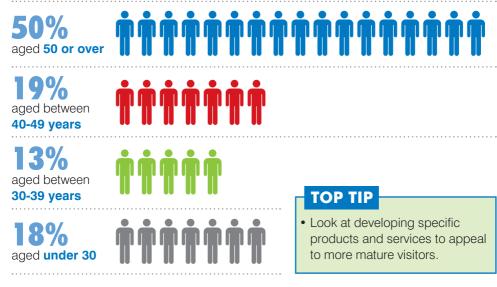


WHERE VISITORS COME FROM



St Andrews | Key Tourism Facts & Figures | 7

AGE PROFILE OF VISITORS

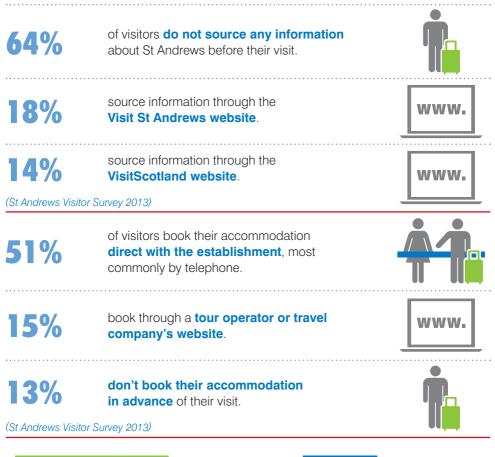


(St Andrews Visitor Survey 2013)

NUMBER IN PARTY			
60%	visit with their spouse/partne	er / N	
20%	visit with friends		
12%	visit on their own		
(St Andrews Visito	or Survey 2013)		
86%	visit without children		
47%	are on their first visit		
of those surve	rcely loyal to the town – 46% yed in 2013 had visited the town 5 TIMES IN 5 YEARS . or Survey 2013)	Think about developing a loyalty scheme to reward frequent visitors.	

8 | St Andrews | Key Tourism Facts & Figures

PLANNING A TRIP



DID YOU KNOW?

The **Visit St Andrews website**, operated by **St Andrews Partnership**, is the principal visitor 'portal' to St Andrews. The website had **c 800,000** page views from almost **300,000** unique users in 2014, and has been ranked as one of the '**World's Top 20 Most Influential Tourist Board Websites'** (*Influencers in Travel, 2011*). The highly popular **Visit St Andrews Facebook, Twitter and Instagram social media channels have some 20,000 followers**.

- Ensure your business listing on **www.visitstandrews.com** is up to date and accurate.
- Provide a link to www.visitstandrews.com from your own website so potential visitors can access the full range of information on the town.

SECTION 3 TOURISM EXPENDITURE



- OVERNIGHT VISITORS generate 82% of the total visitor spend in St Andrews. (STEAM 2012)
- The average OVERNIGHT VISITOR to St Andrews spends <u>\$344.20</u> during their time in the town.
- The average DAY VISITOR spends £46.50 during their time in the town.

(St Andrews Visitor Survey 2013)

EACH YEAR, VISITORS TO **ST ANDREWS SPEND £98 million** IN THE TOWN

(STEAM 2012)

How do visitors to St Andrews spend their money?



(St Andrews Visitor Survey 2013)

SECTION 4



"Our visitors often comment on the excellent range and standard of accommodation provided in this area. The high quality of our hotels, guest houses, B&Bs, self-catering properties and caravan parks helps ensure that St Andrews provides all the accommodation options expected of a world-class tourist destination."

Jim McArthur, Chairman, St Andrews Partnership

DURING PEAK SEASON **ST ANDREWS CAN PROVIDE BEDS FOR 10,000** VISITORS PER NIGHT

(TRC – Future Supply & Demand Modelling – May 2012)

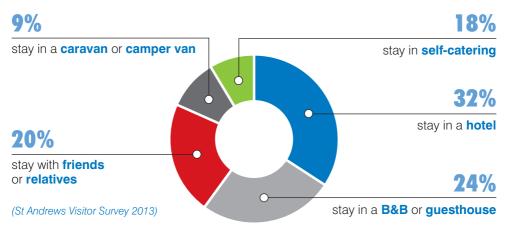
ACCOMMODATION TYPE

In 2011, a Tourism Accommodation Audit showed there were 207 TOURISM ACCOMMODATION operations in St Andrews, as follows:

18 Hotels/Inns
70 Guest Houses/ B&Bs
70 Self-catering operations
7 Holiday/ touring parks
7 Holiday/ touring parks
9 Others (campus, exclusive use venue & hostel)

ACCOMMODATION USED

Of visitors staying overnight in St Andrews:



These figures show the types of accommodation chosen by visitors – see page 6 for the total bednights spent in each type of accommodation.

OCCUPANCY

Latest year-round accommodation occupancy figures published in 2012 show:



Information supplied by St Andrews Bed and Breakfast Association suggests a **B&B OCCUPANCY RATE (ROOMS)** of **31%** in 2014.

HIGH QUALITY STANDARDS

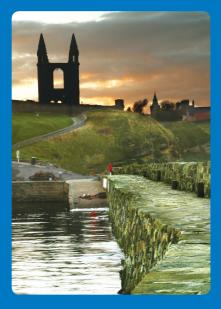
- Of the establishments in the SERVICED ACCOMMODATION sector in St Andrews that are VisitScotland Quality Assured, 61% ARE GRADED 4 STAR OR ABOVE.
- Of the establishments in the NON-SERVICED ACCOMMODATION sector in St Andrews that are VisitScotland Quality Assured, 57%
 ARE GRADED 4 STAR OR ABOVE.

(VisitScotland Quality Assurance 2014)

On TripAdvisor, the holiday review site: 11% of hotels are rated 5 STAR tripadvisor **79%** of hotels are rated 4 STAR **60%** of B&Bs/Guest Houses are rated 5 STAR 35% of B&Bs/Guest Houses are rated 4 STAR **62%** of self-catering establishments are rated 5 STAR 35% of self-catering establishments are rated 4 STAR

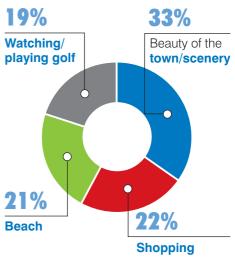
(TripAdvisor, December 2014)

SECTION 5



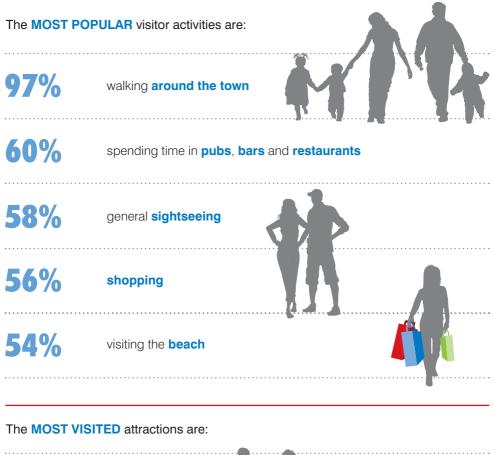


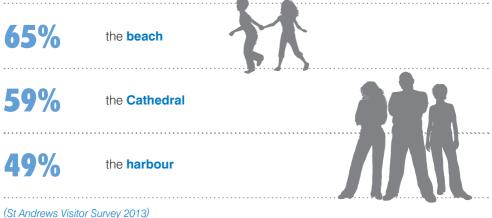
KEY MOTIVATIONS FOR A VISIT TO **ST ANDREWS ARE:**



(St Andrews Visitor Survey 2013)

- Make sure you have plenty of information available for visitors about what to see and do in the area on arrival.
- Don't be afraid to provide personal recommendations visitors will welcome it!





EATING OUT

With such a fantastic natural larder on our doorstep and a host of high-class eating places, visitors to St Andrews are able to enjoy some of the best cuisine in the country.

- EATING OUT is the second highest category of spend for visitors to St Andrews, accounting for 23% of all visitor spend in the town.
- **60%** of visitors to St Andrews spend time in **PUBS**, **BARS** and **RESTAURANTS**.
- 84% of visitors are satisfied with the quality of food and drink when dining out in St Andrews, but fewer (68%) are satisfied with the availability of local produce and the value for money of eating out (73%).

(St Andrews Visitor Survey 2013)



"Here at Rufflets we're committed to using local and Scottish produce wherever possible. But we recognise that we need to shout more about the fine local and regional foods we offer, by telling visitors about provenance on menus and signposting to the local suppliers we use. To address this, we're looking at developing a Fife food-focused 'market menu', showcasing the worldclass produce on our doorstep to diners".

Stephen Owen, General Manager, Rufflets Country House Hotel

DID YOU KNOW?

- There are 8 restaurants in St Andrews with AA rosettes.
- The area is home to many food and farm shops where visitors can buy fresh seasonal produce, and artisan producers where they can see and experience the production process.
 Find out more at www.foodfromfife.co.uk

- Find out about the **local food & drink producers** on your doorstep and think about how you could incorporate their produce into your menus.
- If you already use local produce, tell your visitors about it. It will add value to their visit!

SHOPPING

There are almost **150 DIFFERENT SHOPS** in the town. (www.shopsinstandrews.co.uk)

SHOPPING IS THE THIRD HIGHEST CATEGORY OF VISITOR EXPENDITURE IN ST ANDREWS, accounting for 12% of

all visitor spend in the town.

56% of **VISITORS** to St Andrews **GO SHOPPING** when here.

(St Andrews Visitor Survey 2013)

TOP TIP



• Make visitors aware of the 'Special Offers Directory' on www.visitstandrews.com which lists the latest offers from retail outlets across the town.

CULTURE, FESTIVALS & EVENTS

In 2012, festivals in Fife collectively attracted over **118,000 people** and generated additional visitor spend of over **\pounds3.2 million**.

(Festivals in Fife)

St Andrews has a wonderfully diverse cultural offer, with events and festivals taking place every month of the year. This events programme is a key driver of visits and provides a fantastic asset for tourism businesses.

Events taking place outwith St Andrews, such as **Pittenweem Arts Festival**, can also have a significant impact on the town as festival-goers look for places to eat, drink and stay.



Key annual events and festivals in St Andrews include:

	Attendance
Snowdrops by Starlight (February)	4,000
StAnza Poetry Festival (March)	14,000
On The Rocks Festival (April)	6,000
St Andrews Highland Games (July)	3,500
Lammas Market & Street Fair (August)	N/A
Alfred Dunhill Links Championship (October)	22,000*
St Andrews Voices (October)	900
St Andrew's Day Celebrations (November)	6,000
*Final day only	(various sources)
•••••••••••••••••••••••••••••••••••••••	

All attendance figures based on most up to date available.

DID YOU KNOW?

- On The Rocks is the largest studentrun arts festival in Scotland, and the second largest in the UK.
- The Lammas Market & Street Fair is the oldest surviving medieval street fair in Europe.
- **The Byre Theatre** is so named because its original home (1933-69) was indeed a disused cow shed.

- Check out **www.visitstandrews.com** for a full listing of events taking place in the town throughout the year.
- To find out more about the huge variety of cultural experiences on offer at festivals across the Fife area, check out www.festivalsinfife.co.uk
- Think about how you could work with event organisers to capitalise on the opportunities.
- Make potential visitors aware of events taking place during or around their stay. It could encourage them to stay longer.

WEDDINGS

- OVER 200 WEDDINGS are estimated to take place in St Andrews each year.
- WEDDINGS GENERATE SPIN-OFF FOR MANY TYPES OF BUSINESSES including accommodation providers, shops, bars and restaurants, florists, hairdressers and taxi companies.
- There are **7 APPROVED VENUES** for civil marriages in St Andrews, in addition to the Register Office. (*General Register Office for Scotland*)
- St Andrews claims to be 'Britain's top match-making university', with 1 IN 10 STUDENTS going on to marry a fellow student. (*BBC News*, 2010)
- More than **4,800 PEOPLE** attended weddings in the University of St Andrews in 2011/12. (*Economic Value of the University of St Andrews 2011-12*)



DID YOU KNOW?

The University of St Andrews
 Directory of Wedding Contacts lists
 over 80 providers of different services
 for weddings, from accommodation
 providers and reception venues to
 photographers and florists –
 http://www.st-andrews.ac.uk/media/
 chaplaincy/documents/Wedding%
 20Directory.pdf

"Weddings are an important yearround market for us, with an average of one taking place each week. One trend we've noticed recently is more weddings moving to the low season, which we have put down to a general tightening of the purse strings".

Dylan Kelly, Marketing Manager, Old Course Hotel, Golf Resort & Spa

TOP TIP

• Explore ways that you could work in partnership with the major wedding venues to gain spin-off for your business.

THE VISITOR EXPERIENCE

The St Andrews Visitor Survey 2013 found that:

82%

71%

33%

19%

9%

of visitors to St Andrews are '**VERY SATISFIED**' with their overall visit

agree that St Andrews EXCEEDED THEIR EXPECTATIONS

76% would PROBABLY or DEFINITELY VISIT AGAIN

99% of visitors praise the **FRIENDLINESS OF LOCAL PEOPLE**

66% rate CUSTOMER SERVICE AS VERY GOOD

51% rate St Andrews' **VALUE FOR MONEY** as very good.

TOP TIP

- Think about what added value or services you could offer to make your visitors feel they're getting great value for money.
- If you're not sure what visitors think of your business, ask them! Collecting and using customer feedback is a fantastic way of improving your visitor offer.

SOCIAL MEDIA & HOLIDAY REVIEWS

The St Andrews Visitor Survey 2013 shows that, after their visit to St Andrews:

of visitors UPLOAD PHOTOS of their trip to the internet.

COMMENT on their trip on Facebook.

WRITE A REVIEW of their trip on a website such as Tripadvisor.

TOP TIP

 Actively encourage visitors to post reviews of your business by providing a link to review sites such as TripAdvisor from your website.

SECTION 6



"Here at the Hotel Du Vin, golf visitors generate 60%-70% of our business in the height of the season. The US market is particularly strong from June to September, while in the shoulder months we tend to get more golfers from Scandinavia and Northern Europe. However in the off-season, it's UK golf business that helps to sell rooms".

Niall Thompson, General Manager, Hotel Du Vin

TODAY, THERE ARE **13 GOLF COURSES** WITHIN THE ST ANDREWS POST CODE AREA

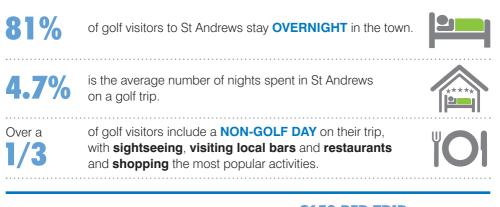
Documented evidence shows that golf was played in St Andrews as far back as **1552**.

DID YOU KNOW?

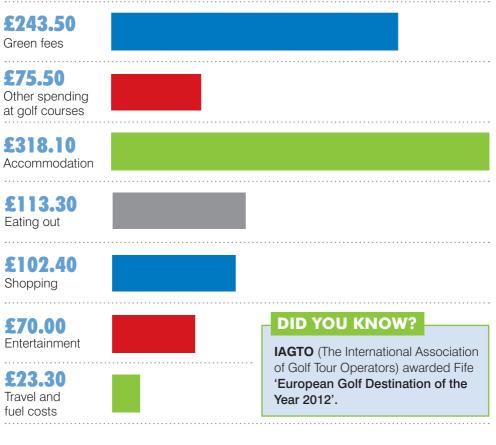
- The St Andrews Visitor Survey 2013 found that **19% of all visitors come to either play or watch golf**.
- St Andrews Links Trust manages
 7 golf courses on which more than
 230,000 rounds of golf are played
 each year. 45,000 rounds a year
 are played on the Old Course.
 (St Andrews Links Trust website)
- St Andrews Links takes up almost 300 hectares, making it the largest public golfing complex in Europe. (St Andrews Links Trust website)



The St Andrews Golf Visitor Survey 2013 tells us a great deal about the golf market.



The average spend by golf visitors in St Andrews is **£659 PER TRIP** broken down as follows:



WHERE OUR GOLF VISITORS COME FROM



KEY DEMOGRAPHICS

- **89%** of golf visitors to St Andrews are **MALE**.
- 69% are AGED 45+.
- Most golf visitors to St Andrews come as a **GROUP OF FRIENDS**, with an **AVERAGE PARTY SIZE OF 5.1**. However, a **QUARTER VISIT WITH A PARTNER**.
- **61%** are **REPEAT GOLF VISITORS** to St Andrews.
- For **89%**, playing golf in St Andrews is **'VERY IMPORTANT' TO THEIR DECISION** to come to Scotland.
- **66%** of golf visitors who stay overnight use **HOTEL ACCOMMODATION**.
- 10% use B&Bs or GUEST HOUSES.

INFORMATION

World-renowned golfing events, such as **The Open Championship** and the **Alfred Dunhill Links Championship**, are inextricably linked with St Andrews.

Thousands of visitors come to spectate at these and other golf events, benefiting many local businesses.

- Make sure you know what golf events are happening in St Andrews by checking out the events listings at www.visitstandrews.com
- Think about what added value or special deals you could offer eventgoers to encourage them to visit your business.
- Think about how you could attract nongolfing partners to visit your business.

THE OPEN CHAMPIONSHIP



- The 2010 Open Championship attracted over 200,000 SPECTATORS (The Open Championship 2010 – Economic Impact Assessment)
- **92%** of SPECTATORS CAME FROM OUTWITH FIFE (The Open Championship 2010 – Economic Impact Assessment)
- 48% of spectators stayed in COMMERCIAL ACCOMMODATION
- **15%** stayed in **NON-COMMERCIAL ACCOMMODATION** (i.e. in their **own houses** or **with friends** or **relatives**).
- **37%** were **DAY VISITORS** (The Open Championship 2010 – Economic Impact Assessment)
- SPECTATORS accounted for 59% of DIRECT SPENDING at the event.
- **THE BALANCE** was generated by **organisers**, **event staff**, **patrons**, **media** and **players**. (*The Open Championship 2010 Economic Impact Assessment*)
- TV COVERAGE of the 2013 Open Championship was seen by over 500 million viewers. (www.theopen.com)

INFORMATION

For more information on the Open Championship, go to **www.theopen.com**

TOP TIP

 Think about what products and services you could offer to spectators, organisers, competitors and media to help you stand out from the crowd.

SECTION 7 BUSINESS TOURISM



"The majority of residential conferences at the University take place in the summer period and come from both UK and international markets. Internal academics generate a significant proportion of these conferences, which can be booked up to 4 years in advance. The international conferences bring the greatest number of add-on nights and the greatest number of accompanying partners".

Audrey Bruce, Events Manager, University of St Andrews

IN TOTAL BUSINESS TOURISM VISITORS SPEND

94,300 BEDNIGHTS IN ST ANDREWS EACH YEAR

(TRC - Future Supply & Demand Modelling – May 2012)

Business tourism is an important sector for St Andrews. As many conferences and events come to the town in the low season, from October – April, the sector is key to St Andrews operating as a year-round tourism destination.

Much of the town's business is made up of international corporate meetings using large hotels and association business using University venues.

Smaller hotels also benefit from meetings, workshops and events, and tourism-related businesses in the town benefit indirectly from business tourism through incremental spend by delegates in shops, restaurants, bars and visitor attractions.

DID YOU KNOW?

The Fairmont, St Andrews is the largest conference hotel in Scotland. A large conference at the hotel will take **200 rooms** and book up to **2 years in advance**.



of **VISITOR BEDNIGHTS** in St Andrews are generated by **BUSINESS TOURISM** visitors.

(TRC – Future Supply & Demand Modelling – May 2012)



The economic value of **BUSINESS TOURISM** to St Andrews is in excess of **£7.4 MILLION PER ANNUM**.

(St Andrews Hotel Opportunities-2012)



The University has **90 VENUES** for meetings and events, the largest of which can accommodate up to **900 PEOPLE**. *(Economic Impact of the University of St Andrews 2011-12)*



PEOPLE PER YEAR attend **CONFERENCES AND MEETINGS** in the University. These events include day and residential conferences. *(Economic Impact of the University of St Andrews 2011-12)*

TOP TIP

- Make sure you're **aware of the large conferences** and **events** coming to St Andrews.
- Think about how you could capture your share of delegate spend in the town.
- Speak to the conference and event teams at the major venues to explore how you could work in partnership to add value to delegate stays.

The new **Business Tourism for Scotland** website has more insights and information on the business tourism market – **www. businesstourismforscotland.com/index.html** "The pharmaceutical and oil industries are important sectors for conference bookings at the Fairmont, St Andrews. A lot of conferences link into incentive packages offering golf. These are key to converting enquiries into confirmed business.

Working in partnership with others in the town is vital for us. For example, we frequently provide accommodation and golf to delegates attending conferences at the university. This type of collaboration is a 'win win' for us".

Robert Glashan, General Manager, Fairmont, St Andrews

SECTION 8 UNIVERSITY OF ST ANDREWS



Over six centuries the University has established a reputation as one of Europe's leading and most distinctive centres for teaching and research.

The **students** and **staff** represent a market in themselves, spending on **accommodation**, **socialising** and **food**.

ST ANDREWS IS THE OLDEST UNIVERSITY IN SCOTLAND AND WAS FOUNDED IN 1413

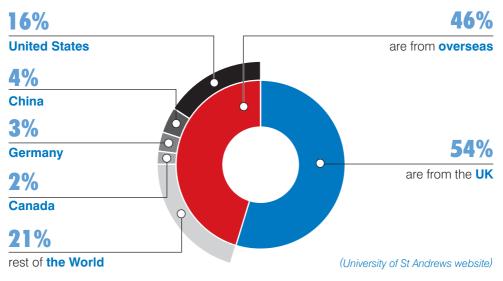
Student labour enables tourism-related establishments to fill many part-time posts.

In addition, the University contributes to the economy by attracting additional visitors through:

- Visits from friends, families and students of the university.
- Conferences, events and courses hosted by the university.
- Provision of accommodation for leisure visitors.
- The University has **7,500 FULL-TIME** students (University of St Andrews website) and **2,350 STAFF.** (Economic Impact of the University of St Andrews 2011-12)
- It is the **BIGGEST EMPLOYER** in St Andrews. (Economic Impact of the University of St Andrews 2011-12)
- **45% OF STUDENTS** have a parttime job for an average of **14 HOURS PER WEEK.** (Economic Impact of the University of St Andrews 2011-12)

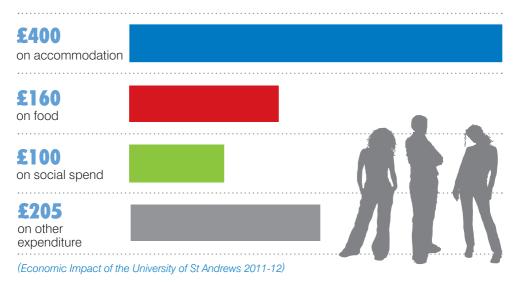
THE STUDENTS

The students at the University represent **100 NATIONALITIES**



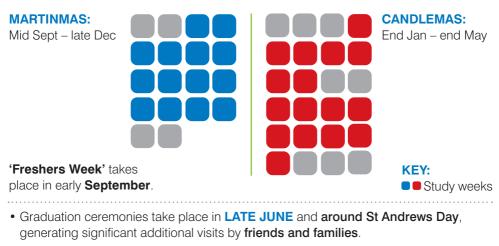
STUDENT EXPENDITURE

Students each spend an average of £865 PER MONTH



KEY CALENDAR DATES

The University operates two semesters:



 'VISITING DAYS' are held throughout the year to offer prospective students a chance to look around the University and find out more about their chosen courses. Find out more at www.st-andrews.ac.uk/study/ug/meet-us/visiting-days/

UNIVERSITY ALUMNI

Former students, or alumni, are an important tourism market.



There are over **45,000** alumni worldwide, based in **14 COUNTRIES ACROSS 5 CONTINENTS**.



There are also **37** ALUMNI CLUBS and SPECIAL INTEREST GROUPS WORLDWIDE. (University of St Andrews website)



A variety of **UNIVERSITY** and **ALUMNI-ORGANISED EVENTS** take place throughout the year, bringing additional visitors to the town.

In addition, many alumni choose to GET MARRIED in St Andrews.

UNIVERSITY ACCOMMODATION



- UNIVERSITY ACCOMMODATION is available seasonally for a period of around 10 weeks from June – September, with 1,300 EN-SUITE BEDROOMS PROVIDING 15,000 BEDNIGHTS A YEAR for leisure visitors.
- 1,300 PEOPLE attend residential courses each year, staying an AVERAGE OF 24 NIGHTS in the town. (Economic Impact of the University of St Andrews 2011-12)
- MORE BEDSPACES will come on stream in 2015 as a new hall of residence is completed.

DID YOU KNOW?

Highlights of the University's Collection of **112,000 artefacts** are on display in three museums, all of which are open to the public: **MUSA, Gateway Galleries and Bell Pettigrew Museum.**

- Think about ways you could work in partnership with the University's Accommodation Services team to generate spin-off for your business during the key 10 week letting period.
- Familiarise yourself with the University's events programme at **www.st-andrews.ac.uk** and ensure you're ready to capitalise on the business opportunities.
- Look at developing added value offers and new products and services to encourage visiting friends and family/ alumni to use your business.

ABOUT ST ANDREWS PARTNERSHIP

St Andrews Partnership is a local charity which unites public agencies, business groups, voluntary/civic bodies and community representatives who all work together for a common purpose – to help make St Andrews an even better place to live, work, study and visit.

The Partnership can help you to keep up to date with the latest business opportunities, events and developments in the tourism sector.

For more information go to www.visitstandrews.com/b2b

The Partnership also manages the official visitor gateway website www.visitstandrews.com. There are opportunities to promote your business on the site. For more information contact info@standrews.co.uk

ORGANISATIONS

The following organisations all provide insights, intelligence and support to help you develop your business:

- Business Tourism for Scotland www.businesstourismforscotland.com/index.html
- Fife Tourism Partnership www.fifetourismpartnership.org
- Scottish Enterprise www.scottish-enterprise.com
- Scottish Tourism Alliance www.scottishtourismalliance.co.uk
- Tourism Intelligence Scotland www.tourism-intelligence.co.uk
- VisitScotland www.visitscotland.org/research_and_statistics.aspx

Whilst all information contained in this guide is believed to be correct at time of publication, St Andrews Partnership and Scottish Enterprise can accept no responsibility for any error or misrepresentation and cannot accept liability for loss or damage caused by any reliance placed on the information contained in the guide.

Photography by courtesy of Paul Tomkins/VisitScotland/Scottish Viewpoint, Mairi Bunce, University of St Andrews, G1 Group, DJMS, Spencer Bentley (sierrawhiskeybravo.com), Fairmont St Andrews, and St Andrews Links Trust.

St Andrews Partnership is a charity registered in Scotland, No SC041684



