



Impacts of the St Andrews World Class Strategy

Mid-term evaluation and economic impact analysis

August 2006

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Executive summary

This mid-term evaluation of the St Andrews World Class (SAWC) Strategy examines the performance of an ambitious project to lever both tourism and commercial benefits for Fife and Scotland. The study finds the initiative comfortably exceeding its targets for tourism impacts and adopting innovative ways of managing the project to ensure its sustainability.

Managing St Andrews World Class

The SAWC initiative has progressed from an initial research project to the point where the partners are planning the long term management needs of St Andrews as a tourism destination. In this review, we have identified a number of learning points and good practice for further dissemination.

The St Andrews World Class umbrella also covers collaboration between the University of St Andrews and SE Fife, which is covered in Appendix 1 – Research commercialisation. This is treated as a separate work stream.

The project's progress has been ground-breaking at almost every stage. Key elements of best practice include:

- The early establishment of economic baselines, and a method that could be repeated easily, allowing progress to be measured;
- The use of scenario planning to develop a long term vision and plan that balances the needs of visitors, businesses and residents;
- The development of a structure for delivering and managing the project that captures the benefits of partnership and is led by the private sector. This makes the project more likely to succeed and continue after public sector investment ends.

There are a few issues recognised as not having made expected progress at this stage:

- The slow pace at which progress has been made leading to fears that the initiative would lose momentum;
- Poor communication with the business community and residents which means that local buy-in needs to be improved; and
- Political support from some quarters has been lukewarm.

The partners recognise that further progress is needed and have drawn up an action plan that tackles these issues.

Strategic impacts

This review has looked at the SAWC project as seen by SE Fife and its initial large scale investment rather than the overall SAWC initiative itself, which was established with a minimum 10-year horizon and is looking for long term sustainable change rather than short term outputs. The progress made so far is largely limited to refining

processes rather than delivering major projects, although we understand that the emphasis is likely to change soon. We have three main conclusions:

- The outcomes of the strategy are likely to achieve (and probably comfortably exceed) the original, ambitious, targets set for change in St Andrews;
- A clear distinction needs to be made between the strategy, which is not negotiable, and the action plan, which may change in light of operational experience; and
- The investment in improved decision making must now produce results in the eyes of all stakeholders.

Summary of economic impacts

The impacts shown in Table 1 below show the increase in value of the tourism industry. There seems to be a marked shift in the business base away from lower spending to higher spending visitors. This has a significant effect on the overall figures because of the higher daily expenditure figures for serviced accommodation.

The table illustrates that the original targets for visitor spending and jobs have been reached, even though there is still significant work to be completed in this phase of SAWC.

Table 1 Summary of impacts

2001 prices	Baseline (2001)	Vision (2012)	Mid term (2005)	Change to mid term	% of Vision
Visitor Spending (at 2001 prices)	£40.95M	£73.3M	£71.44M	+ 74.46%	97.5%
All Jobs (Direct, Indirect & Induced)	1393 - 1564	2123 - 2482	2372	+ 60.5%	103%
Gross Value Added (Total)	£21.3M	N/A	£35.3M	+ 40.0%	

Issues for the future

Although significant progress has been made, it will be important to maintain momentum if the initiative is to deliver the full range of results envisaged by the group. The strategy will need to change emphasis from developing the means into delivering the main elements under the Place, Product and Progress headings. In doing this, particular attention needs to be paid to:

- The state of the partnership in the sense that Fife Council is still not fully on board with the strategy. As a key provider of services and infrastructure and the representative body at political level, its support is essential.
- The PR and communication effort needs to be stepped up to address concerns among local businesses and residents. Most of these concerns can readily be answered; and
- The length of time the strategy has taken to get going. Although the delays have been for good reasons, and will prove beneficial in the longer term, there is impatience among stakeholders, and real progress is now needed.

Introduction and background

Background

Scottish Enterprise Fife and the University of St Andrews launched 'St Andrews World Class' as a *research* based initiative in 2002. It aimed to help the university enhance its competitive advantage as a world class teaching and research institution. Both organisations planned to pool their resources to help St Andrews realise its potential as a visitor attraction and a commercial base for companies.

The St Andrews World Class Strategy was launched as a *partnership* initiative in 2003 and will run until 2008. The public launch of the strategy took place in May 2004. Its overall vision is to recognise and build on St Andrews' existing international competitive advantages of golf, tourism and university research.

Its mission is:

The prime objective of the St Andrews World Class Vision, and therefore the central mission of this strategy, is to reposition St Andrews from being a world famous location to being a world famous and world class destination which is an aspirational place to visit while being an aspirational place to live and work.

The strategy aims to promote:

- Labour and skills development;
- Business development;
- Visitor facilities and services;
- Support infrastructure;
- Brand development; and
- Commercialisation of intellectual property and assets.

The partnership has developed many projects, such as environmental improvements, within these themes to achieve the St Andrews World Class vision.

A key feature of the project has been its innovative approach to developing a collective view of the most suitable development route for the town by:

- its use of scenario planning techniques to model a range of futures and identify the most effective development for the town;
- its involvement of private sector interests from an early stage to drive the vision forward; and
- its projection of benefits to the wider regional economy, the potential to benefit areas of deprivation in Fife and Tayside.

The St Andrews World Class vision was developed by a group of local businesses and organisations including accommodation providers, retailers, St Andrews Links Trust and the University of St Andrews. Fife Council, Scottish Enterprise Fife and the Kingdom of Fife Tourist Board backed the vision.

Objectives

Scottish Enterprise Fife has commissioned a progressive evaluation of the impacts of the St Andrews World Class Strategy in the fields of golf, tourism and academic commercialisation so far. The evaluation has quantitative and qualitative elements, with objectives to:

- determine the net added impact of the St Andrews World Class Strategy;
- identify further opportunities, barriers or constraints, increased business confidence, local business views of brand awareness and strengthening;
- identify potential areas of change to the existing approach to increase the strategy's impact; and
- measure progress towards the outputs that form part of the original strategy, such as number of active participants and number of businesses assisted.

To achieve its objectives the evaluation needs to answer the following key questions:

- To what extent has the project achieved its objectives?
- Where is the initiative likely to go if it continues this way?
- How well has the partnership worked and why?
- How effective have the means of getting funding been?
- Which aspects of the current approach should change to make it as effective as possible?

Method

In this section we describe the methods we used to evaluate the strategy.

Evaluation framework

The first stage was to develop an evaluation framework. This describes the main questions that we need to find answers to, the sources of information that we will use and the objectives and targets that we measure progress against.

We have based our evaluation on current good practice and make use of the guidance contained in the Treasury Green Book (see below), the accepted standard for evaluating publicly funded projects. We have also followed the updated guidance on project appraisal developed by Scottish Enterprise. Application of this guidance to all network projects is a requirement of Scottish Executive.

By applying consistent methods to evaluate projects across the SE network it is easier to show how each contributes to the strategic objectives of 'A Smart Successful Scotland – refreshed (2004)' and achieving value for money.

The Appraisal & Evaluation Guidance definition is:

Evaluation is a qualitative and quantitative assessment of the processes used and outcomes achieved in the project implementation. It may occur at the end of the implementation period or at a predetermined point during implementation. The purpose of evaluation is to provide learning and contribute to continuous improvement. Learning may either relate directly to this or similar projects. In either case the evaluation may provide Project Learning and Strategic Learning.

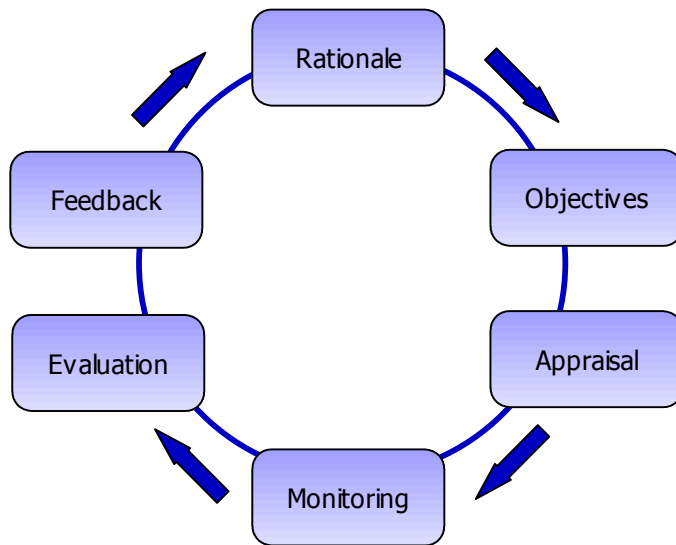
Key elements of this approach therefore include finding out:

- Is the rationale it still relevant?
- How well have projects met the twin objectives of developing tourism and academic commercialisation?
- What can we learn from a detailed analysis of monitoring data and information?
- What are the direct and indirect impacts of the strategy, partnership arrangements, delivery mechanisms?
- What lessons and good practice were learned from the initiative and feedback gathered?

National guidance and evaluation

The UK treasury sets the standard for how public money should be used in the UK. Its guidance underlies how large public agencies and funders look at value for money. In the 'Green Book' the Treasury sets monitoring and evaluation as part of the 'ROAMEF' cycle, shown below. Evaluation has a clear role in this cycle – strengthened if similar approaches have been used to appraise the project in the first place.

Figure 1 The ROAMEF cycle



The Green Book remains the best available authority on how to approach an evaluation and its place in the life of a project.

Method

We have followed the requirements of national and SE guidance in our method for this evaluation. The main elements of our process have been:

1. Review of available data – we have examined the data produced since the baseline study and relevant reports including evolving strategy at national level.
2. Interviews with stakeholders – we conducted interviews with key stakeholders in SAWC to find out their views on progress. These are mainly the businesses involved in the project group.
3. Survey of local businesses – we conducted an electronic survey of local businesses because, as the principal beneficiary group it is important to canvass their views on the investment in SAWC.
4. Quantitative analysis (tourism impact model) – we used the up-to-date data to calculate the current value of tourism in St Andrews, as a comparison with the baseline data.

As there has not been much new research since SAWC started, we have relied to a large extent on interview data and the opinions of stakeholders.

Data review

We have reviewed all the relevant quantitative and qualitative data relevant to SAWC. This has included recent STEAM reports and other published tourism data. There has been some research undertaken into the impact of the Open Championship and the needs that local businesses have from SAWC. We have referred extensively to the minutes and reports produced by SAWC committees over the past few years. We have also referred to the refreshed Smart Successful Scotland and the new national tourism strategy – a framework for change. These are the main sources against which we are able to assess the relevance of SAWC and its progress.

Quantitative analysis

The method for this study has been straightforward and has repeated the data analysis elements of the previous two quantitative reports¹.

The first element was a brief desk-based analysis of currently available data to support a comparison with the 2001 baseline. As always we have preferred primary data over secondary data, although we assess this against existing data and knowledge – effectively a reality check. This involved analysis of:

- Fife Visitor Survey 2001/2;
- STEAM 2001, 2002, 2003 & 2004;
- UKTS/IPS 2003, as published by VisitScotland (this is the most recent data);
- Miscellaneous other statistics as available (for example survey of visiting golfers).

From this data we were able to produce a set of baseline inputs for the Tourism Impact Model (see Appendix 3 for a detailed explanation of the model). The input data relies on several variables:

- visitor numbers, split by origin;
- The accommodation they use, if any;
- The length of stay of each category of visitor;
- The amount each category of visitor is likely to spend.

The outputs of this exercise enable us to draw an interesting comparison between the current position and the previous position and allow us to assess whether the progress made is in line with expectations.

Stakeholder interviews

As well as SE Fife staff members, we interviewed 12 key stakeholders (principally people involved in SAWC through active participation, for example committee

¹ *The Economic Impact of Tourism in St Andrews - Updated Projections*, Hall Aitken for Scottish Enterprise Fife, 2002 and *The Economic Impact of Tourism in St Andrews*, 2001

membership) as part of this evaluation, listed in full in the appendix. The interviews were to find out attitudes to SAWC and the St Andrews brand, to examine perceptions of progress and changes that have been taking place and views on the processes that are taking SAWC forward.

Business survey

We undertook an e-survey of businesses in St Andrews, followed up by telephone interviews to corroborate and amplify the responses. We received 28 responses.

The survey established how involved the business community is in the strategy and whether the owners feel that it is making a difference.

The number of survey respondents was restricted by the lack of a comprehensive e-mail list of businesses (SE Fife is now addressing the e-mail list).

Processes and management

Since its launch in 2003, the St Andrews World Class initiative has undergone a review that resulted in a reorganisation of its strategic themes. And the operating structure of St Andrews World Class has evolved from a loose grouping of local stakeholders to a limited company with a board of directors and a dedicated project manager. This chapter describes the elements of the project and how they work together. It also sets out stakeholders' views on these aspects.

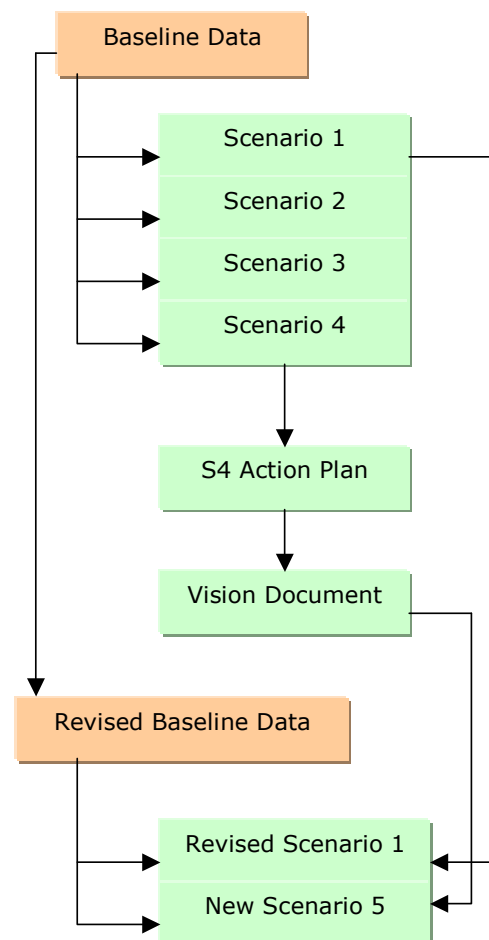
An evolving strategy

History

Following the production of *the economic impact of tourism in St Andrews*², Scottish Enterprise Fife commissioned Hall Aitken in 2002 to produce a further study. This was to look into the level and impact of interventions needed to achieve the preferred vision (Scenario 4) set out in the report. This update study also looked at the impacts of these interventions in terms of economic benefit to the area and Scotland as a whole.

The study involved consultations with key players in the town to find out what developments, projects and improvements were likely to take place between 2001 and 2006. The impacts of these were analysed through the Hall Aitken Tourism Impact Model to compare them with the preferred scenario outputs. This exercise also identified the actions and projects needed to achieve the vision. In addition, a benchmarking exercise identified the significant characteristics of successful comparator destinations in the UK, to ensure awareness of the town's competition.

Finally, the consultants assembled a comprehensive action plan. This identified a wide range of actions needed to develop St Andrews as a leading UK destination of the future. This plan covers actions and interventions involving all the partners in the St Andrews 'project', not just those of specific interest to SE Fife. Hall Aitken ran the action plan through the Tourism Impact Model to ensure the plan could deliver the necessary impacts for the local and national economies.



² The economic impact of tourism in St Andrews, Hall Aitken for SE Fife, 2001

Following further consultations during 2001 and 2002, involving the newly established Tourism Task Group, the partners produced a revised action plan. A comprehensive vision document was then drafted as the basis for discussion with the public sector interests.

These developments formed the basis for the St Andrews World Class Strategy.

The vision

The evaluation brief summarises the overall vision for the St Andrews World Class Strategy as:

“To recognise and build on St Andrews’ existing international competitive advantages of golf, tourism and university research.”

The essential objective was to move St Andrews from being just a world famous location for golf to being a world famous and world class place to live, to work and to visit³. To achieve this, the focus was on providing consistent, high-quality, value-adding products and services to residents, workers and visitors while preserving the town’s character. Specifically, the vision called for:

- an extended range of experiences and amenities, including golf, walking and cycle paths, as well as cultural and creative activities;
- action addressing skills and human resources issues;
- improved – and sustainable – transport arrangements;
- an improved town centre fabric and environment;
- exemplary management of the town’s infrastructure;
- an extended programme of events such as fairs, musical performances and markets;
- a high-quality non-convenience retail environment.

The vision also projects economic outputs for 2013 – ten years into the initiative. According to these the initiative will:

- preserve visitor levels;
- increase overall expenditure in most sectors of the economy by around £24m a year⁴; and
- create around 1,000 jobs, the majority resourced from less prosperous areas of Fife.

Shaping the strategy

The St Andrews World Class initiative was launched in 2003 to achieve this vision. Public agencies, businesses and other local organisations joined forces and created

³ *St Andrews World Class Vision Statement*, St Andrews World Class Project Executive, 2005

⁴ SE Fife CMT report 06 May 2003; SAWC Vision document, February 2006

a Project Group. In January 2004 the group formally approved the strategy that had seven themes:

1. Labour and skills development;
2. Business development;
3. Facilities and services;
4. Support infrastructure;
5. Urban environment and events;
6. Transport and accessibility; and
7. Marketing, research and monitoring.

The strategy's project plan consisted of 61 separate actions. Three respective committees were responsible for these actions under three different headings:

1. Manpower, skills and business development;
2. Physical infrastructure; and
3. Progress and communications.

In summer 2005 St Andrews World Class went through a review of the strategy's priorities and any progress made. The result was a progress report and new operating plan for the 2005-06 period. The key issues the review identified were growing support among project partners of a **Destination Management Organisation (DMO)** and a need for a **project manager** who deals with the day-to-day management.

The progress report recommended to:

- reorganise the strategy into the four strategic themes – People, Place, Product and Progress;
- reorganise the committee structure;
- appoint a dedicated project manager; and
- agree on creating a DMO for St Andrews as the single "big goal"⁵.

⁵ Progress report 2004-05 and operating plan 2005-06 – second draft version, Patrick Laughlin, 2005

The actions in the new operating plan fulfil these recommendations.

Partnership working

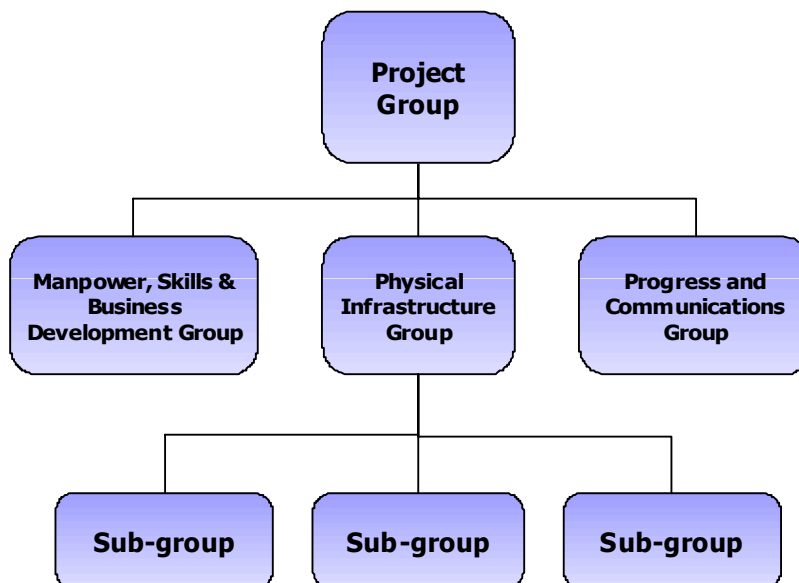
The key feature of this partnership is the working together of public and private sector organisations. The promotional brochure describes it as private sector led with support from the public sector. Initially, the key public sector members were Kingdom of Fife Tourist Board, Scottish Enterprise Fife and Fife Council. Hotels and guest houses, B&Bs and other businesses, as well as the University of St Andrews and St Andrews Links Trust represent the private sector. More recently, the initiative has opened its doors to some local interest groups, such as St Andrews Preservation Trust.

Until Spring 2005, the partnership existed on informal arrangements. To give it a more formal basis, Fife Council and Scottish Enterprise Fife set up St Andrews World Class Ltd as a Company Limited by Guarantee. For legal reasons VisitScotland was unable to come on board as a subscribing member. SE Fife and Fife Council have two directors each on the company board; the other four directors come from the university and local businesses.

Working together

Within St Andrews World Class, various groups and committees are working together to move the project forward. The diagram below shows the initiative's early working structure – before the review – where the Project Group oversaw the work of the three subject committees:

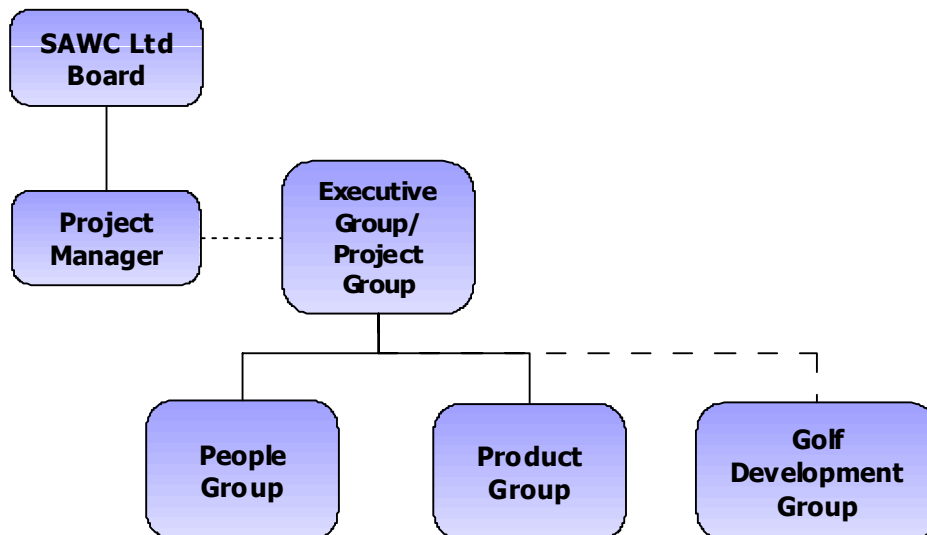
Figure 2 Original project management structure



In an attempt to break down the tasks related to physical development projects into a manageable size, up to three sub-committees were set up in support of the Physical Infrastructure Committee.

Following the recommendations in the Progress Report 2004-05, the original seven strategic themes regrouped into the four new strategic themes People, Place, Product and Progress. The main purpose of this was to make the initiative more focused and action-orientated. The resulting working structure takes account of these changes:

Figure 3 Current project management structure



While the People Group and the Product Group deal with their respective areas of work, the project manager's role includes the tasks related to "Progress", such as monitoring and PR. The group made a deliberate decision not to have a separate physical infrastructure group. Instead, committees made up of those directly involved deal with "Place" – physical infrastructure – projects on a project by project basis. According to the progress report, the main reason for this was the public sector (with some private sector contributions led and delivered the projects. It had therefore not been practical to expect a private sector-led group to direct a wide variety of public infrastructure and transport works.

There is no formal arrangement about the relationship between the company board and the Executive Group. The aim is that at each Executive Group meeting there would be a report from the company board about its activities.

The need for organisational change

This change in structure and responsibilities was a carefully considered response to the emerging reality of running the strategy and partners saw several benefits, including:

- it better reflected the private sector's priorities and the public sector's resources to deliver change;
- it enabled the golf entities to develop their products in parallel, while preserving their need to keep their commercial interests confidential;
- it placed the private sector firmly at the helm of the SAWC project, leading to an increased prospect of private investment;

- the decision not to have a public-sector led physical infrastructure group will allow more efficient delivery of public realm elements.

Executive Group

The Executive Group is the former Project Group. Its membership covers a wide range of public and private sector organisations:

- Fife Council
- Scottish Enterprise Fife
- VisitScotland
- Historic Scotland
- St Andrews Harbour Trust
- St Andrews Community Council
- St Andrews Preservation Trust
- University of St Andrews
- St Andrews Links Trust
- St Andrews Pilgrim Foundation; and
- Hotels and other private businesses.

This group's remit is to "act as the 'engine room' for St Andrews World Class. On the one hand it sets the strategic direction for the project and ensures that it delivers its Operational Plan; while on the other hand it generates new ideas. These are to be worked up by the two Working Groups and St Andrews World Class Ltd."

Membership of this group, which meets monthly, appears to be relatively open in that the main criteria for joining are expertise and availability. The new Operating Plan suggests that individuals – such as an individual business person or a public agency officer – should be able to join for a specific period of time "if the group is dealing with a particular issue".

Project Manager

Since January 2006, a dedicated project manager has been in place to manage and coordinate activities of the St Andrews World Class initiative. The manager, who has a contract with St Andrews World Class Ltd, currently works from a temporary office that is part of the University of St Andrews. He reports to the company's board.

Private businesses collaborate with the public sector partners to fund this post, with 20% coming from private businesses. Appointing the project manager gave the initiative a single point of contact.

People Group

The focus of this working group is on skills and workforce issues. Its membership includes representatives from Fife Council, the University, Scottish Enterprise Fife and St Andrews Links Trust, as well as local hotels and businesses, but also from:

- Careers Scotland;

- o JobCentrePlus;
- o Springboard Scotland; and
- o Edinburgh Retail Academy.

At its monthly meetings, the group reviews progress on the various actions of the work programme that includes business training programmes, employers' events and a recruitment and retention plan.

Members of the People Group who are also members of the Executive Group report on the group's activities regularly.

Product Group

The Product Group is a new working group that held its first meeting in February 06. According to the Progress Report 2004-05 the roles of this group include:

- o organising and overseeing the delivery of the business development and visitor services projects from the Operational Plan;
- o developing additional services; and
- o looking at developing a St Andrews brand image.

In essence, this group aims to examine ways to improve the St Andrews product, particularly its tourism product. The links between this group and the People Group are important as the latter is responsible for developing the skills needed for these improvements.

Golf Development Group

The existing Golf Development Group is effectively a "product group". It brings together the key golf operators of the ten courses in St Andrews, including St Andrews Links Trust, to develop St Andrews as a world class golfing destination. The Golf Development Group sits at a distance from St Andrews World Class as its work is commercially confidential. However, its activities support the aims of the initiative. With an SE Fife representative chairing the group as an independent partner, it is the only group chaired by the public sector. The Executive Group receives updates on the work of the Golf Development Group through the SE Fife chair.

Issues arising from consultation

All our interviewees commented positively on the St Andrews World Class initiative. In general they appeared enthusiastic about the project and the activities it covers. Consultees have identified as strengths were having a dedicated project manager in place, partnership working in general and the achievements of the People Group in particular. Most stakeholders also welcomed the fact the partnership now included some local interest groups. Overall, interviewees feel the strategy has developed in a way that responded to what is happening on the ground, without losing sight of its aims and objectives.

On the other hand, interviewees identified some issues the project had to address or still needed to address. These relate to finances and to the speed with which St Andrews World Class has moved forward.

Partnership issues

Stakeholders we spoke to described the St Andrews World Class initiative as a positive example of private and public sector cooperation where “good and constructive exchanges” took place. Most interviewees welcomed the partnership widening to include more local interest groups: St Andrews Preservation Trust, and the St Andrews Pilgrim Foundation. This broadened participation has contributed to an increased local buy-in.

The various groups within the project are working together well. Positive recent developments have included:

- o regular updates of groups on SAWC projects through the project manager; and
- o monthly meetings of SE Fife staff involved in St Andrews World Class.

In fact, the monthly internal project meetings at SE Fife have recently been identified as an example of best practice within the Scottish Enterprise network.

We believe the SAWC partnership model is an example of leading practice in this type of project.

We believe the SAWC partnership model is an example of leading practice in this type of project. The reasons are:

- o The process through which partners have gone to achieve the present structure was a key learning point from the early stages. In itself, this has been a worthwhile outcome from SAWC and one which should be disseminated.
- o The current management structure commands widespread support from the private and public sectors.
- o The private-sector led and public sector supported set-up is unusual and is likely to ensure its long term sustainability after public sector investment dries up.
- o The current set-up attracts investment from both the private and public sectors.

Involving stakeholders

Our interviewees, who – apart from the Fife Council representative – are all Executive Group members, were satisfied with their involvement in the project. They felt well informed of activities and found communication between committees rather effective. Private businesses found it difficult to find time away from their day-to-day work to become more active than they currently were. They recognised, however, that this was a problem on their side.

Of the businesses who responded to our business survey 84% had heard of St Andrews World Class, 64% had had no involvement with it and only one-third said they would like to be more involved. It appears that, for the business community, being informed of what is going on is more important than having direct involvement in the strategy. According to the project manager this issue is now being addressed through PR and information activities.

Project management

Our interviewees confirmed that appointing a dedicated project manager had been a positive move for the initiative. They felt that having the project manager in place had made a big difference in terms of:

- leadership and coordination; and
- providing a public face and single point of contact.

There were also positive comments on the current project manager's suitability for this post.

Financial issues

In our research we came across issues related to finances:

A financial vehicle for St Andrews World Class

Some stakeholders stressed the importance of having a financial vehicle for funding activities under the initiative. Examples such as raising the funding for the project manager's services from project partners had highlighted some problems. For instance, it proved difficult for the private sector to come up with its share. This was not only because small and micro businesses find it difficult to find funding for more activities, but also because there was no fixed funding mechanism within the initiative.

The newly set up company – St Andrews World Class Ltd – is a step towards a more formalised approach for financial arrangements, although its financial situation was unclear at the time of our research. The project manager and project partners were currently waiting to find out what funding would be available for St Andrews World Class. At the time of this publication of this report, we understand the key partners have secured funding for the next financial year. In addition, SAWC has made strides to raise funding from other sources including, for example, the Fife Tourism Alliance.

Partners expect that eventually the DMO will ensure that funds will flow to the project in a sustainable way. There remain questions over:

- What and how will the private sector pay towards the organisation?
- Is the business base sufficient to sustain a DMO?
- What is the most effective model to adopt?

On this last point, Scottish Enterprise has recently undertaken work to identify good practice in destination management structures which will guide the partners in setting up a suitable vehicle. Obviously much work remains to be done before setting up such an organisation, although a key recommendation of the 2001 Hall Aitken Study related to the need for local co-ordination and leadership.

Role of Fife Council

There is a lack of clarity on the role Fife Council should play within the initiative. While the other partners called for the Council to take on a more active role – also in terms of funding contributions – the Council's position is to adopt a facilitator's role

rather than that of an active partner. There are also differences between the council's position from a political and an operational perspective. Yet it is clearly a key agent in the delivery of services and infrastructure in St Andrews.

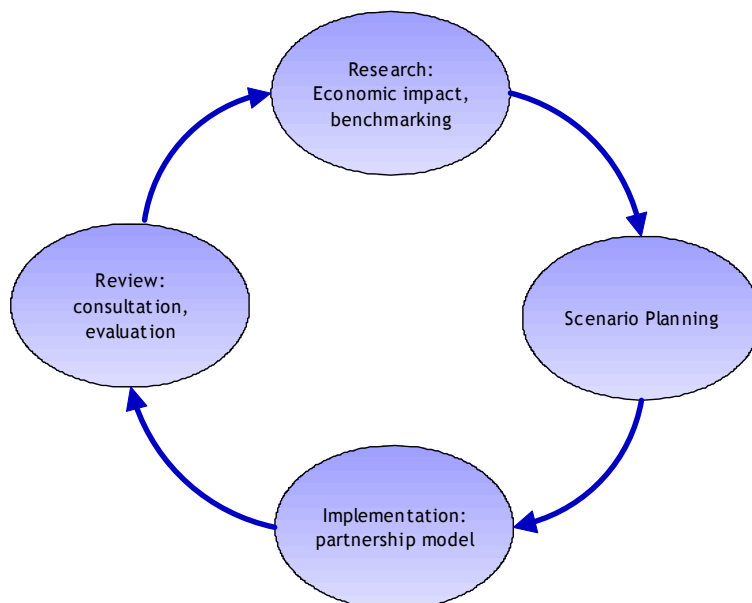
The new operational plan stated that "securing the renewed support and leadership of Fife Council" would make the initiative more community focused and broaden participation. However, some stakeholders felt the Council wasn't fulfilling this role and that a change of thinking within the Council was needed.

Conclusions

The review of processes and management reveals the set up and management of SAWC has been a crucial part of the project. A key learning point is the need for partners to take time to negotiate a structure that is workable, has widespread support and is sustainable after public sector funding ends.

Setting up SAWC follows the classic learning cycle model, as pictured in Figure 4 below.

Figure 4 SAWC experiential learning cycle (after Lewin)



The project has progressed from research, economic modelling, scenario planning and strategic planning. Setting up a private sector led partnership to fulfil the strategy led to innovation at almost every stage. Key elements of best practice include:

- The early establishment of economic baselines, and a method that could be repeated easily, allowing progress to be measured;
- The use of scenario planning to develop a long term vision and plan that balances the needs of visitors, businesses and residents;
- The development of a structure for delivering and managing the project that captures the benefits of partnership and is led by the private sector. This makes

the project more likely to succeed and continue after public sector investment ends.

However, the project has not escaped criticism. The speed with which the initiative has moved forward (securing the early commitment of partners was not straightforward) was a source of frustration among all partners and there is a fear that it might lose momentum. Some stakeholders blamed the public sector bodies – Fife Council in particular – for the slow pace and called for a change of attitude and increased understanding of the issues surrounding St Andrews World Class within the Council.

The current policy of including a much wider range of interests in the project is not without risk. At this stage, we believe it needs strong leadership and a sharp focus on delivering projects. The need constantly to consult with a wide audience can lead to inertia and compromise.

Lessons learned

A key learning point is the need for partners to take the time to negotiate a management and organisational structure that is workable, has widespread support among key partners and is likely to be sustainable after public sector funding is withdrawn. All the partners feel that this is a key outcome from SAWC and a lesson that can be picked up by other projects.

Related to this is the emergence of private sector leadership and the consequently changing role of the public sector partners. The key direction on most projects, other than infrastructure which is clearly the responsibility of the public agencies, is decided by private sector led groups.

However, this does mean that the body that actually delivers the project needs to be identified clearly. It also needs to be committed and resourced to delivering the projects it has responsibility for. This point is important because there are only a few organisations that have the capacity to deliver the type of interventions that SAWC has identified and these bodies are crucial to the initiative's success.

The innovative use, early on in the process, of tools to focus attention on the future needs of visitors, businesses and residents, and capturing that in a vision for the town has enabled the plans to be highly ambitious. Given the very conservative history of developments in the town it is unlikely this agenda would have developed without this early research.

There is a general consensus that the communication surrounding SAWC has been disappointing and has perhaps not met the expectations of partners. One result is that the level of buy-in from local businesses is less than ideal at this stage of the project.

Strategy impacts and outputs

In this section we set out the aims and objectives of the strategy and evidence of progress towards achieving them.

Overview

Progress towards strategic aims has been much slower than expected at its launch. The project is now building up momentum and is starting to undertake more visible and tangible activities that will start to provide the results that residents, local businesses and visitors expect.

In the original report and action plan delivered in 2001-2, a scenario planning exercise established the most favourable alternative as far as the business, resident and visitor communities were concerned. The action plan envisaged slow change over an extended period of time that would gradually reduce reliance on high volume, low value tourism (including day visits) and increased the higher value, staying visitors to the town. The strategy is essential in ensuring that consistent direction is maintained over this extended time period.

There are three points we have comments on:

- o progress in delivering tangible benefits and projects;
- o changing the strategy; and
- o the decision making process.

Delivering tangible benefits

There has been slow progress so far towards the strategy's main aims. Although the progress reported is slow in terms of the St Andrews World Class Strategy, it is in line with the original projections made in 2001. Therefore the outcomes of the strategy are likely to achieve the original, ambitious, targets set for change in St Andrews. These set out to balance the quality of life of residents with economic prosperity for businesses and employment opportunities for Fife as whole, with important conservation and environmental considerations for the town.

The outcomes of the strategy are likely to achieve the original, ambitious, targets set for change in St Andrews.

A changing strategy

We have consistently heard of change to the SAWC strategy. The evolution of strategy has been an outcome of extended negotiations over the process of making decisions and is documented in the previous section.

What we have noted is that difficulties at an operational level have compelled changes in **priorities and actions** rather than the overall strategy. We are seeing the original strategy, worked out as a long-term set of goals and captured in the vision, is still sound, and showing real signs of being achievable. Therefore there is a

strong case for retaining this core set of principles and continually restating them as the overarching rationale for the long and detailed set of actions produced by the various project steering groups. The latest action plan is summarised in Appendix 4 (progress table).

The other side of this argument is there are real dangers in changing the strategy regularly. This is because the link between St Andrews World Class and public investment would be based on a funding case developed for a defunct strategy.

A clear distinction needs to be made between the strategy, which is not negotiable, and the action plan, which is.

Action planning is about delivery and is not to be confused with setting strategic priorities. Each action or project must show how it will contribute to achievement of the strategy. There is a clear distinction between the strategy, which is not negotiable, and the action plan, which is. To keep the link between the strategy and what people see on the ground, priorities must be reviewed and restated regularly. Continually changing priorities are not only a reason for delays but mean there is a danger the priorities will start to follow the funding – rather than the other way round.

Decision making

Scottish Enterprise Fife undertook a prolonged period of negotiation and consultation during the set-up phase of the project. Initially, SE Fife set up the Tourism Task Group to progress the SAWC project (see Figure 2). But it found the group was making slow progress through in identifying projects, priorities and resources. This is the principal reason for delays in agreeing projects and committing resources and has been a source of major frustration for all involved in SAWC. When we look at what has taken place in SAWC so far, much energy has been expended on **process**, in effect getting to a position where decisions can be taken, projects and actions agreed, resourced and delivered.

The committee structure has been overhauled, the status of the organisation has changed and the detailed plans have changed, yet so far there has been little to show. And the protracted period of negotiating a new decision making structure will have been time lost, unless it results in a significant improvement in the pace of delivery on the ground. The investment in process must now produce results in the eyes of all stakeholders. After all, the resources are the responsibility of a few bodies which, in any event, have their own decision making processes to adhere to.

The investment in improved decision making must now produce results in the eyes of all stakeholders.

Planned Benefits

The expected benefits of the SAWC strategy are threefold:

Direct economic impact

The original aims for the strategy were

- To create an additional 1115 jobs (direct, indirect and induced),

- o An overall increase of 212 - 289 jobs at the Scottish level; and
- o To grow visitor expenditure to £64.30m from £40.95 million, an increase of £29.95 million.

These targets were based on analysis of the original vision document⁶.

Access to opportunity

Current data suggests there are some 100 individuals unemployed in the St Andrews catchment. Therefore, the required jobs will provide opportunities to outlying areas including unemployment blackspots of Central Fife and Dundee.

Enhancement of perception

The proposed activity to reinforce St Andrews' reputation on a world-class stage will impact positively on the global perceptions of Fife and so contribute to the objectives of the Fife Local Economic Development Strategy. In fact, there is evidence that it has already had a positive effect on attracting inward investment as potential investors can see that things are beginning to change. Table 2 below shows the high expected private sector investment currently committed or planned.

Table 2 Proposed investments in St Andrews (source: SE Fife March 06 Board Paper)

Initiatives	Estimated expenditure
St Andrews Grand – Hamilton Hall redevelopment	£20M purchase £8M refurbishment
St Andrews Links Trust Course No 7	£7M
St Andrews Links Trust Golf Practice Centre extension	£1.7M
St Andrews Bay Golf Resort & Spa – development of more accommodation and new spa	£38M
Old Course Hotel – refurbishment of bed stock, spa extension and Dukes Course improvements	£25M + £10-15M over 3 years – Craigton
Yellowstone (Feddinch) club development	£5-20M
Grange House – central facilities and self-catering accommodation	Not known
Total	£114.7M - £134.7M

To track the impact of identified activity against each of the Strategic Themes, progress will be measured regularly during the lifetime of this strategy.

Measurements are described in each section of the attached operational and action plan. The aim is to make these measurements meaningful, concise and easy to compile. Where possible, these should be compatible with the measurements for the Scottish Tourism National Framework for Action, the Fife Community Plan and the Fife Local Economic Development Strategy. The recent comprehensive survey of

⁶ The Economic Impact of Tourism in St Andrews - Updated Projections, SE Fife/ Hall Aitken 2002

visiting golfers commissioned by SE Fife is a useful baseline and should be repeated for comparison purposes every few years.

Progress towards strategy aims

The report that informed the original strategy (economic impact projections) suggested several areas for development. However, the new operational plan for 2005-07 focuses on the “live” aspect of SAWC and it omits many tourism-related actions in this short-term plan.

We have not found it easy to find out whether progress has been made towards the strategy’s original aims because these have changed since the project started. It has therefore been difficult to make direct comparisons between the original plans and the current state of the project, so our findings are based on our interpretation of events.

Conclusion

Although SE Fife is carrying out this review at ‘mid-term’, it mainly covers the initial large-scale funding committed by SE Fife and other partners, rather than the SAWC project itself. The SAWC project, which has a minimum 10-year horizon, is looking for long-term sustainable change rather than short-term outputs.

The progress made so far is therefore largely limited to refining processes rather than delivering major projects, although we understand the emphasis is likely to change soon.

We have three main conclusions:

4. It seems likely that to achieve (and probably comfortably exceed) the original, ambitious, targets set for change in St Andrews;
5. There is a clear distinction between the strategy, which is not negotiable, and the action plan, which is subject to change because of operational experience; and
6. The investment in improved decision making must now produce results in the eyes of all stakeholders.

Lessons Learned

In discussion with stakeholders, two lessons emerge:

1. The link between the private investment and the visible commitment of the public and private sectors to improving the destination is not proved, but there is circumstantial evidence to suggest that there is a link;
2. Maintaining and communicating a long term vision that is consistent and commands wide support will make tactical changes to action plans easier.

Review of activities

For this section of the report we follow the structure for activities that came out of the updated operational plan – People, Place, Product and Progress.

People

Aim and responsibility

One of the main aims of the St Andrews World Class initiative is to develop an integrated, comprehensive and coordinated approach to career development, labour supply, skills training and continuing professional development. As stated in the SE Fife Board Paper, “the skills and quality of the St Andrews labour force must comprehensively reflect world class standards in all aspects of its visitor experience”⁷.

Traditionally there has been a labour and skills shortage in St Andrews, particularly in the hospitality and retail sectors. Our business survey confirmed this by finding that more than one-third of respondents had experienced a shortage of labour locally.

Actions under the “labour and skills development” theme of the original strategy addressed these issues. They fell under the responsibility of the Manpower, Skills and Business Development Group which – as the name implies – was also responsible for business development issues.

In the reviewed strategy, the People strategic theme and the People Group address skills and workforce issues with an action plan that currently consists of 14 action points. The review report identified labour recruitment and retention as “the single biggest difficulty faced by the hospitality sector (and other employers) in the town”. Limited access to transport and a shortage of affordable housing were major issues the strategy needed to tackle in that context.

Progress and views

Our interviewees welcomed the progress related to labour and skills under the St Andrews World Class initiative. Several felt this was the area where they have seen most activity, ranging from employer survey and skills development programmes to working with schools. We have been unable to establish a positive impact for local businesses at this point as 80% of businesses had not found recruiting staff any easier over the last three years. However, stakeholders were confident that this would change within the next six months or so.

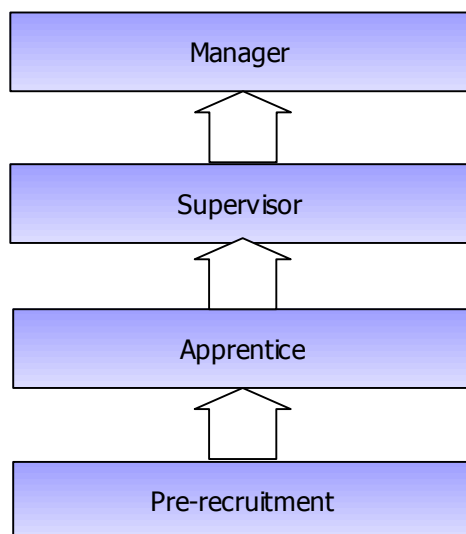
Those involved in delivering this part of the strategy were continuously improving their approach by using the lessons learned from activities in the early stages. The People Group partnership had been working particularly well.

⁷ Scottish Enterprise Fife Board Meeting: 13 March 2006 - St Andrews World Class project update

A Skills and Learning Senior Executive at SE Fife gave us an outline of past, current activities and planned activities. This was backed up by the information on achievements from the March 06 SE Fife Board paper. Giving employers exactly what they want has been identified as the success factor of the People Group's work.

Skills Academy

The primary focus in the People Group is developing the Skills Academy. This continuing initiative is a "virtual entity" that acts as an umbrella for a range of "People" activities. Its structure will develop over the next 12 to 18 months. The academy takes a tiered approach, covering several stages of employability and skills training:



(Diagram based on client interview)

The idea is to provide opportunities for developing or enhancing people's skills and show them clear progression routes from apprenticeships right through to the strategic management of the MBA in Hospitality. At the moment a feasibility study is underway with a view to developing a business case for the academy.

At the time of our research several labour and skills initiatives had already taken place:

- a skills programme (winter 2004/05) – aimed at all levels within organisations – that attracted 111 delegates from 37 employers; a further programme is running – aimed specifically at lower grade employees – addressing skills development and retention issues. So far this programme has engaged 122 delegates and 45 companies;
- employer awareness events attended by 20 employers;
- a pilot pre-employment training programme that helped eight participants to secure jobs;
- developing work experience programmes with local schools, aimed at improving the reputation of the industry among potential entrants; and
- a children's hospitality awareness event involving 300+ schoolchildren.

The People Group is planning to attract and involve other learning and training institutions, including colleges and universities, to help deliver programmes. Involving employers is central to the Skills Academy. In fact, the project is described as employer-led.

Place

This strategic theme focuses on the physical infrastructure of St Andrews as well as transport and access issues. Activities under this heading are part of a wider infrastructure investment programme.

Physical infrastructure

As mentioned in the SE Fife March 06 board paper, limited public sector investment in the St Andrews public realm had led to the town looking tired and showing signs of strain. The objective of this strand of activities is therefore to ensure that, through a programme of coordinated investment in physical works and continuing management, St Andrews has the appropriate infrastructure for a town aspiring to “world class” status.

Transport and access

Transport issues and a shortage of car parking are major challenges for the town. To make it easier for “sense of place” issues concerning improvements of the historical core of the town to continue, the Executive Group decided to focus on the town’s traffic problem at the earlier stages of the project.

According to last year’s review report, completing Fife Council’s new integrated transport plan – covering public and private transport to and within St Andrews – will be important. However, the report also states that many of the actions included in the plan will not happen until the 2007-10 period.

Progress so far

Key developments currently include:

1. **Petheram Bridge Car Park** – extension and environmental improvements of the town’s main car park to provide an extra 100 spaces and easier links to the town centre;
2. **Old Guardbridge Road** – improvements to the quality of the approaches to the southern edge of the Old Course and St Andrews Links Trust (SALT) Practice Centre, including new lighting, footways and an extra 77 car parking spaces;
3. **Bruce Embankment** – improving the quality of the public realm in the area around the Royal & Ancient Clubhouse which regularly features in media coverage of the Open;

4. **Golf Place** – public realm improvements to the historical core of the town;
5. **Bus Station redevelopment** – upgrading of infrastructure, access and information, including installing CCTV and a link road.

SE Fife had funded phase 1 of the South Street public realm improvements – completed in 2005 – to set the standard for later upgrading works.

Some projects from the operating plan, such as the Market Street environmental improvements, are still planning or consultation stage. Others were dropped following public opposition, including the Lade Braes walking and cycling route. The table in Appendix 4 gives an outline of the known progress so far.

Issues from consultation

Our interviewees confirmed that improvements to the public realm are beginning to show. Most mentioned the improvements to Bruce Embankment as the most visible change. Although some raised the issue that these improvements would have happened anyway – that is without the St Andrews World Class Strategy – they saw the real value the strategy label had added in the better quality, for example in building materials. One interviewee also said the strategy label had helped to unlock money from funders for projects like Bruce Embankment.

Many of the stakeholders we asked mentioned the failed planning application for phase 2 of the South Street project as an example from which the partnership learned important lessons. These included researching, planning and consulting on projects properly before moving them forward.

Product

This strategic theme seeks to:

- encourage businesses to work together to develop and promote new and improved products for visitors; and
- improve services for both existing and prospective visitors.

In essence, the Product Group's role is to examine ways in which the "product" of St Andrews, particularly its tourism product, could be improved. The emphasis is on exploring how local businesses could collaborate to deliver such improvements. The project sees the work of the Golf Development Group as an example other groupings of businesses should follow.

This section looks at some of the topics the Product Group has been discussing.

Information, orientation and town centre appearance

The working group is planning a review of visitor information and orientation. The first stage will be an audit of existing provision, supplemented by an audit of the town centre's appearance from a visitors' perspective. This would highlight any issues about town maintenance, litter, facades of buildings, signposting and so on. The findings could persuade property owners to improve, as well.

Orientation Centre

The Orientation Centre for St Andrews, located in a section of the ground floor of the St Andrews University Gateway Centre, will make it possible for businesses to introduce their products and the town's experiences to visitors. The first stage of the development which consists of static display boards with information panels will be completed by summer 06. The second stage will add IT-based interactive terminals providing visitors with bespoke information to suit their needs.

On-line ticketing

The Product Group agreed that an on-line booking and ticketing service for St Andrews events, concerts, cinema, theatre and so on would be useful for visitors and locals. This would allow users to find out what was happening and book spontaneously. Booking fees or commissions could fund such a service. The working group will look at related issues including whether the service could extend to booking accommodation and meals, and how several relevant websites could come together under a single St Andrews portal website.

Shared marketing resources

An idea the Product Group is exploring is to provide local small businesses with marketing and PR support to:

- raise the quality of promotional efforts;
- boost business levels; and
- improve the consistency of promotional messages.

This would mean that St Andrews World Class engages a marketing consultant or agency and makes them available to all local businesses on a paid-for basis.

Wireless Town project

This project is about setting up an ubiquitous wireless broadband service throughout the town allowing businesses and academia to promote their services to residents, visitors and workers. This would include visitors paying for the use of personal digital assistants (PDAs), thus creating an income stream for St Andrews World Class.

Originally St Andrews University's role was to lead on this with the support of their IT department. More recently SE Fife has taken the project back in-house. A brief will be sent out to potential commercial partners.

Golf product

Developing St Andrews as a world class golfing destination is the remit of the Golf Development Group. Its membership includes all local golf course operators and Scottish Enterprise. According to the stakeholders we spoke to there has been good progress in this field. The work of this group is confidential but we want to mention a few project examples:

1. **St Andrews Golf Academy** – opening officially in June 06. Schools will run throughout the year from the Links Practice Centre.
2. **Joint booking service** – a telephone and e-mail booking service allows golfers to make bookings without having to contact operators individually.
3. **Course No 7** – to be launched in 2008.
4. **Joint marketing and PR** – this includes trade ads, press releases, direct mail activities and presentations at industry events.
5. **Homecoming Festival 2009** – the group will lead on the national approach for the golf element of this event.

Branding

Branding St Andrews is an emotive issue.

There is some confusion about what constitutes the “St Andrews Brand” between the logo and treatments the SAWC strategy groups use, and the need for a full branding exercise. A branding exercise depends more on the consistent promotion of specific themes and values than on a logo. Interviewees have said that it should concentrate strongly on promoting some specific themes such as quality, and the branding needs professional treatment.

The business survey shows that 60% of respondents are not aware of the St Andrews brand and only 8% think that St Andrews is benefiting from its brand identity. Clearly there is more work needed to clarify the brand strategy.

Progress

This theme has fewer key aims and focuses on management, monitoring, promotion and communication. The main areas of work are:

- monitoring of activity to support good project management;
- regular communication with main audiences through news releases, meetings and presentations;
- taking forward ‘World Heritage Status’; and
- examining the prospects of developing a destination management organisation.

Initially the Progress and Communications Group was responsible for activities in this field. However, the project had no single point of contact for the local media but was using different people as spokespeople. Last year’s review of the strategy identified this as a drawback.

Most of the tasks related to “progress” now fall into the remit of the dedicated project manager.

Progress so far

The internal reporting and decision making processes – which rely strongly on the effective monitoring of activity – are likely to settle down. There has been a period of flux, with change to committees structures and appointing a full-time manager to manage delivery of the strategy. This, we believe, is having a significant effect in addressing the concerns of people we have consulted in terms of progress.

Issues from consultation

Some consultees, principally from the local business community, expressed concern that they were not informed of progress by SAWC. As a result, the knowledge, and buy-in, is lower than expected and recognised by SAWC as an area needing attention. Having said that, awareness of the project overall is high, with 84% of business people had heard of SAWC (> 1/3 by word of mouth).

We have also identified concerns over communication with key audiences. The knowledge among the business community is below that expected at this stage, because a high level of buy-in by the business and resident communities is fundamental to the overall success of the project.

We believe the destination management organisation discussions are critical to the long-term future of St Andrews. Over our consultations since 2001, reflected in our recent discussions and survey, there is a need for local management of the destination. This provides a focus for all local interests, developing relationships and developing capacity to manage all the various elements of the strategy towards the vision. Setting up a DMO would be one means of achieving this; however, it requires care to maintain the relationship with the rest of Fife and Scotland (key beneficiaries of investment).

Again, we expect that these concerns will be addressed successfully as the project starts to roll out more high-profile activities.

Conclusions

Progress against the different strategy themes have progressed at different paces:

In terms of **place**, the improvements that have been achieved through SAWC, and are planned, have given potential investors in the town increased confidence. This is clear in the continued pace of developments, particularly golf related. The interaction between the private and public sectors is paying dividends and working to the benefit of the community, for example resolving flooding problems along the Old Guardbridge Road.

In terms of **progress**, the enlarged SAWC is a positive forum for conducting both strategic and more detailed dialogue with the resident and business communities. We expect the current programme of regular news releases and presentations to local organisations to have a positive impact in the short and longer term. The partners recognise there needs to be a renewed emphasis on communicating effectively with the different audiences for the project: residents, businesses and visitors.

The **product** is progressing mainly through the initiative of private developers and the wide range of projects detailed earlier in this report. This will be enhanced by the range of initiatives currently under development.

Lesson learned

Key lessons learned include the experience of the South Street project. The failed planning application for phase 2 of the South Street project is an example from which the partnership has learned important lessons. These included researching, planning and consulting on projects properly before moving them forward.

The second lesson frequently quoted was that SAWC had taken on board too many tasks and had identified a large number of projects that it was not in a position to deliver. Prioritisation of projects was inadequate because the resources to deliver them in a reasonable timescale were not available. SAWC therefore raised expectations too high and the inevitable result was dissatisfaction and confusion. Steps are being taken to ensure the better management of priorities.

Quantitative outputs

The analysis of economic impact and jobs shows change in patterns of visit to St Andrews since 2001 resulting in increased income and jobs without a large rise in visitor numbers. This is the effect the original strategy set out to achieve.

Introduction

We have analysed the available data to show what changes have taken place in St Andrews since the 2002 baseline.

The quantitative analysis is in two parts:

1. An estimate of the current value of tourism in St Andrews using the most up-to-date figures currently available and compared with the original baseline and projections made in 2002 (at 2001 prices); and
2. A projection of the value of the projects included in the latest action plan.

Significant changes in visitor patterns

There is a shortage of good data to allow a realistic assessment of the changes that have taken place in the years since the original baseline study. STEAM⁸ has been repeated annually and provides trend data. The Fife Visitor Survey is being repeated in 2005/6 (no data available at time of writing) and although there has been a survey of visiting golfers and an assessment of the impact of The Open, gaps remain.

Overall volumes in STEAM have risen only from 691,000 to 694,250, an increase of 0.5% between 2001 and 2004. Of this most of the increase is in day visits. It is worth noting that this period covers 2001, the year of FMD, SARS and 9/11. There was a 2% decrease in overall volumes in the 2002 figures, so the growth is more in line with expectations (see Figure 5). These trends reflect the picture across Scotland and the recent growth, particularly in overseas visitors.

There has been a major shift from non-serviced to serviced accommodation, potentially signalling a move towards higher spending visitors. This is especially so, given that St Andrews Bay has opened (now achieving 70% plus annual room occupancy) and, anecdotally, hotel business has been good recently.

The STEAM figures show the number of visits in non-serviced accommodation has reduced by 25% and numbers using serviced accommodation has increased by an equivalent amount. This has the most significant effect on the value figure.

⁸ Scottish Tourism Economic Activity Monitor, Global Tourism Solutions 2002, 2003 & 2004 for Scottish Enterprise Fife

Assumptions on length of stay have not been amended. These stem from the Fife Visitor Survey 2001/2. The new Fife Visitor Survey results were not available in time for us to incorporate any changes in data.

The 2004/5 Survey of Visiting Golfers⁹ research shows the average spend for visiting golfers is: £200 for UK visitors, £450 for USA, £300 for Europe and £375 for the rest of the world. These figures have been factored into the tourism impact model as potential maxima in the different categories of visitor although caution is required with survey-derived expenditure figures. However, these figures are significantly higher than any previously researched and support a view that spend figures can be high in St Andrews.

These figures would also suggest that:

Origin	Golfers as % of total visitors
UK	5.4
USA	54.0
W. Europe	22.2
Rest of the World	18.1

Source: Hall Aitken

Summary of impacts

The impacts shown in Figure 7 and Figure 8 below show the increase in value of the tourism industry. There are several likely reasons for this significant change, including:

1. The shift in accommodation from self-catering to serviced accommodation;
2. Increased maximum spend figures based on MW Associates research;
3. Under-recording in the data used as inputs in the 2001 figures.

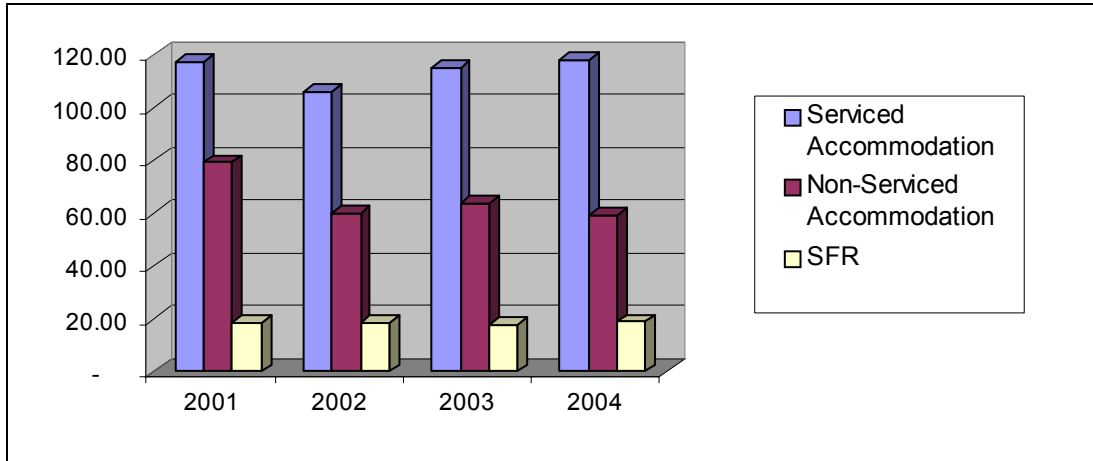
Nevertheless, even if the effects of indifferent data for input into the model are considered, there is a marked shift in the business base away from lower spending to higher spending visitors. This has a significant effect on the overall figures because of the much higher daily expenditure figures for serviced accommodation.

⁹ Survey of Visiting Golfers, MW Associates for Scottish Enterprise Fife

Visitor profile

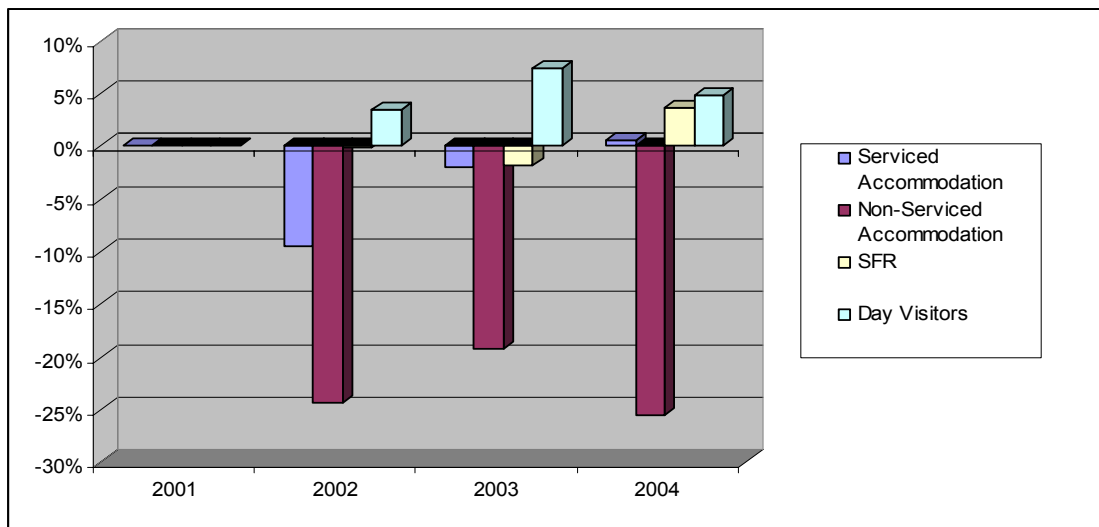
The visitor profile changes are shown in Figure 5 below and show that overall visitor numbers have recovered to 2001 levels after a significant drop after 2001.

Figure 5 Profile of visitors 2001 to 2004



Source: Steam 2001 – 2004, GTS; Hall Aitken

Figure 6 Changes in visitor patterns



Source: Steam 2001 – 2004, GTS; Hall Aitken

Jobs

Figure 7 below shows the numbers of jobs supported now and when the strategy was first researched. We are cautious in attributing all this change to strategy-based growth as general tourism growth and improved data have had an effect. We have calculated (and back-calculated for the 2001 figures) the direct, indirect and induced jobs figures.

These figures mean the estimated number of jobs supported directly by tourism in St Andrews is now 1833. These are unlikely to be St Andrews residents and,

anecdotally, are partly drawn from the target areas of high unemployment in Fife and Tayside.

The significant overall increase may, in part, reflect a conservative estimate in 2001 but we are reliant on available data in these calculations.

Figure 7 Jobs comparison

Jobs Supported	2001	2005	Change
Direct	1074	1833	758
Indirect	191	269	78
Induced	175	270	95
TOTAL	1440	2372	932

Source: Hall Aitken

Economic impacts

As with the jobs figures, we think the comparison needs to be treated with caution as the latest figures are partly driven by growth and partly by new data. We have calculated the GVA figure for both the current and previous figures.

Figure 8 Economic impacts

	Baseline (2001)	Vision (2012)	Mid Term (2005)	Change to date	% of Vision
Visitor Spending (at 2001 prices)	£40.95M	£73.3M	£71.44M	+ 74.46%	97.5%
All Jobs (Direct, Indirect & Induced)	1393 - 1564	2123 - 2482	2372	+ 60.5%	103%
Gross Value Added (Total)	£21.3M	N/A	£35.3M	+ 40.0%	
All at 2001 prices for comparison					

Source: Hall Aitken

Originally, more conservative targets were set to take account of possible displacement of visits from existing attractions and accommodation. These targets, 2285 jobs and £64.3 million in visitor expenditure have also been comfortably exceeded.

The Scottish Executive has set a target of increasing the value of tourism to Scotland by 50% through a combination of increased spend and increased volume of visits. The figures shown for St Andrews contribute to achieving this target and indeed exceed the national 50% growth target.

Link between the results and activity

As with all economic analyses of this nature, it is difficult to establish a definitive causal link between the activities being undertaken and the impacts achieved. However, there are several indicators that suggest that the project, even at this early stage in its development, is having an impact. For example:

- Recruiting significant numbers of staff from areas such as Leven, Methil, Buckhaven and Dundee, as reported in our consultation with St Andrews Bay.
- The significant change in profile of visitors towards higher spending, lower volume visitors. This was a key aim of the strategy from its outset and a requirement of the balance developed between the needs of visitors, residents and businesses.
- That some of the businesses attribute business benefits to the strategy, and there may be a link between the recovery in business since 2001 and the strategy.
- The significant levels of private sector investment are, in part at least, attributable to the confidence in the destination created by SAWC. The scale of investment would suggest the private sector is confident of increases in business over the long term.

Issues for the future

Although there are significant suggestions of progress at many levels, there are implications for how the project progresses, if it is to deliver the full range of results expected.

The strategy will need to change emphasis from developing the means into delivering the main elements under the Place, Product and Progress headings. In doing this, particular attention needs to be paid to:

- The state of the partnership in the sense that Fife Council is still not fully on board with implementing the strategy. As a key provider of services and infrastructure and the representative body at political level, their support is essential;
- The PR and communication effort needs to increase to address concerns among local businesses and residents. Most of these concerns are readily answered, for example the concerns over attracting more tourists, as opposed to the lower volume higher value aims of the SAWC strategy; and
- The time implementation of the strategy has taken to get going. Although the delays have been for good reasons, and will prove worthwhile in the longer term, stakeholders are impatient and real progress is now needed.

Appendix 1 – Research commercialisation

This appendix sets out the key developments in commercialising research from St Andrews University. The main information sources were SE Fife staff, the SE Fife March 06 board paper and the Director of Research & Enterprise Services at St Andrews University.

Context

An assessment by the Scottish Funding Council identified St Andrews as one of the top Scottish universities over a wide range of research fields. The university and SE Fife feel the university has failed fully to exploit the commercialisation potential and so develop its competitive advantage. SE Fife, working in partnership with university teams, supports commercialisation activity through complementary interventions to ensure that research can be fully supported from Proof of Concept through to commercialisation phases. The basis for this support is a Strategic Agreement between the university and SE Fife that highlights priority areas for joint working between the two organisations.

Primary projects

The research brief identified five primary projects for the North Haugh Science Campus site to provide the infrastructure necessary to support the commercialisation process:

- Convergent Technologies Centre, including the Institute of Advanced Medical Technology and Bio-Engineering;
- University Commercialisation Support – development of commercialisation support services for academic and entrepreneurial activities;
- Site servicing and development of science park;
- Support for spin-out companies; and
- Gateway Business Centre.

Priority tasks

In addition, the SE Fife March 06 Board Paper identified several priority tasks under the research commercialisation theme:

- Promoting enterprise awareness and business start-up through improved linkages between the university and the business community;
- Funding advice to individual student entrepreneurs;
- Championing technology co-applications; and
- Individual case management of technology and business development support schemes.

Progress so far

Convergent Technology Centre (CTC)

The focus of this project, for which approval has now been granted, is on providing a physical locus for incubation of convergent technologies projects, focusing on medical photonics. The aim is to develop a centre of c. 20,000 square feet and, through partnership with the University of Dundee, to form an Institute of Advanced Medical Technology and Bio-Engineering (IMSaT), the planning for which is progressing well. The IMSaT would occupy around half of the university's space in the Convergent Technology Centre.

Supported by the multi-disciplinary skills of the new institute, it will also provide space for incubating new science based companies. The new facility would feed into and complement the Intermediate Technology Institutes proposed for Edinburgh, Dundee and Aberdeen.

The planning application for the CTC has just been submitted and building work is to start in January 07, with a target completion date of January 08. Several companies have already been identified as prospective tenants. At the moment there is no space within the university for new companies to reside which shows a strong need for fast completion of the new CTC.

University commercialisation support

Under this heading individual and groups of businesses have increased access to university resources through projects such as the Teaching Company Scheme and the Photonics Innovation Centre. Good working relationships have developed between the university and SE Fife account managers who have a major role in directing and helping local businesses to secure access to broader university technology.

Links are also promoted through the SEEKIT project with Stirling University Innovation Park and the new Interface programme in Edinburgh.

Site servicing and development of science park

One primary project was initial site servicing to support the future commercial development at the science park and facilitating private sector provision of specialist units. However, there are now plans for a science park. According to the university contact, companies graduating from the CTC may need "grow on" space, but he didn't expect these to be located in St Andrews.

Gateway Business Centre

The idea was to establish, within the Gateway Building, space for spin-out companies emerging from commercialisation activity as well as a university-led centre for advanced business education focusing on international business, golf management, technology and creativity.

At the moment the Gateway hosts the university's School of Management. There has been no activity to develop the centre to include the areas mentioned earlier.

Support for spin-out companies

This focuses on support funding to develop companies from proof of concept to viable R&D enterprises. Key achievements so far were:

Fifex

FifeX designs and builds interactive displays for (mainly) science centres and museums but also for education and corporate exhibitions. The company is expanding rapidly and plans are in place to move from the Tech Centre to larger property mainly to house manufacturing facilities. It has finished its first export contract to South Africa.

Arborescent

This company is funded by Oxford based investors to develop non-display inorganic applications from Dendrimers (macromolecular structures). It is much a research and development operation now, with support from the Small Company Innovation Scheme (SCIS) and SMART awards, also from Cambridge based Business Angels.

Lumicure

Lumicure Ltd was formed by two employees from Tayside Health Board and St Andrews University who have been developing a treatment for certain types of cancer using photodynamic therapy. The company is negotiating with a cream manufacturer with a view to a joint project. There have also been talks with Osram Germany.

St Andrews Fuel Cells Ltd

This company has progressed significantly through support from SMART and a single new concept fuel cell has been produced. The project is on target to maximise the efficiency output of that cell. St Andrews Fuel Cells received help with the business plan which resulted in a financial package of £490,000. There is an agreement the company will expand its laboratory and office facilities into the new Technology Centre.

SASOL

This company, which develops chemicals and detergents from oil and coal resources, has achieved all the milestones identified by SE Fife at the inward investment stage, including 19 post-doctoral jobs and seven patents filed. It plans an expansion project that will result in a large increase in activity.

Ceimig Ltd

Ceimig applies precious metals in the nanotechnology industry and is established within the St Andrews Technology Centre. The intellectual property has been assigned to the company and appears on the balance sheet alongside initial funding

injected by the founders. The first batch of material is with customers for evaluation. Collaboration with a Swiss partner is well advanced.

Photosynergy

St Andrews University owns 100% of Photosynergy which was taken over from Tayside as Ferranti Photonics. A marketing consultant has been appointed to validate the company approach and plans.

Plurion

This ITI invested business operates in the energy space relating to battery technology. SE Fife assume that this inward investment company chose to set up itself in Fife because of its proximity to the Energy Park, the capability of St Andrews and potential future linkages to fuel cell activity there.

Other support

The SE Fife board paper also lists some other support activities:

- Support for Student Entrepreneurship, in particular the Quantum Leap Business Plan competition – there were 31 entries into the last competition and six of the eight finalists started up a business.
- Seminars on business planning, leadership, intellectual property and entrepreneurship which more than 150 students attended.
- Support for registration and development of the IP Portfolio.
- A range of support programmes to provide new companies with marketing, financial and commercial support – for example a feasibility study to spin out part of the operation of the Sea Mammals Research Unit.
- Support to encourage licensing and other collaborative arrangements, such as a DTI programme between Dentofex and the university on a dental micro drill to enable photo activated disinfection.
- Two Enterprise Fellowships, such as that with St Andrews Fuel Cells.
- With SE Fife's support it has achieved six Proofs of Concept so far, with several joint applications. They expect that at least two of the PoCs will result in spin-outs.

Future priorities

The SE Fife board paper lists several future project priorities:

- Continued efforts to develop the pipeline of projects through activities such as innovation workshops with academics and building closer linkages with academic schools to encourage Proof of concept applications, leading to further spin-outs;
- Strengthening student entrepreneurship and linkages with the Business Gateway through further joint activity and events;
- Continued development of the IP Portfolio;

- Structuring the delivery and management of the CTC to provide a high level, integrated and effective service;
- Proactive working of the SE Fife Growing Businesses team with spin-out companies to achieve maximum potential growth.

Appendix 2 Business Survey

This summarises the detailed findings from the business survey.

Notes from the St Andrews E-survey

- Most respondents (60%) locate in St Andrews to be near to customers and suppliers.
- More than 1/3 of businesses employ between 2-4 people.
- More than 1/3 of respondents have experienced no barriers to recruiting staff.
- More than 1/3 of respondents are experiencing a shortage of labour locally.
- 80% of businesses have not found recruiting staff any easier over the last 3 years.
- 2/3 of businesses are not recruiting any staff at the moment.
- Under 1/3 of respondents have taken on staff from elsewhere in the EU or overseas.
- More than 2/3 of respondents have carried out workforce training in the last 12 months.
- Over half of respondents have seen no increase in budget devoted to staff training and development.
- Only half of businesses felt that investing in training would help their business grow.
- More than half felt that they had a strong or very strong customer base in St Andrews.
- Half of all respondents say their customers are spread evenly between St Andrews and elsewhere.
- 73% of respondents have seen an increase in customers over the last 3 years.
- 84% of respondents think this has led to an increase in turnover.
- 80% of businesses think attracting customers has not become easier.
- One-third of businesses think there is an issue with services in St Andrews.
- More than two thirds of respondents think that more information needs to be circulated about service availability.
- 84% of businesses have heard about the World Class Strategy.
- More than one third of respondents found out about it by word of mouth.
- 79% of respondents think the promotion of the St Andrews World Class strategy needs to be improved.
- 42% of respondents think there is a need for better planning and organisation.
- 64% of respondents have had no involvement with the World Class Strategy.
- Only one-third of respondents would like to be more involved with the World Class Strategy.

- 95% of businesses do not think the World Class Strategy has played any part in increasing turnover.
- 60% of respondents are not aware of the St Andrews brand.
- Only 8% of respondents think that St Andrews is benefiting from its brand identity.
- More than half of respondents think it plays a part or a big part in the success of the World Class Strategy.
- 76% of respondents think something else needs to be done to maximise the impact of the St Andrews brand.
- 81% of respondent think the brand needs to be marketed better.
- “Don’t know enough about the World Class Strategy”.
- “It is too early to say”.
- “It is a total waste of money”.

For the survey, we had sent an electronic questionnaire to the following businesses:

Businesses contacted		
Argos	Fresh Looks	J & G Innes Limited
Barber's Pole	Govan Opticians	Kathy Philip Florist
Beetle	Grange Inn	Lloyds TSB Scotland plc
Byre Theatre	Henderson Black & Co	Lebibe Limited
The Body Shop	HBOS	BA Amusements
Castles	Jahangir Restaurant	G M Mitchell & Son
Country Carpets and Furniture	J & E Shepherd	Miss I Marshall
Clydesdale Bank Plc	Jim Farmer Golf & Leisure	McDonald Insurance
Café India	Jamie's Florist	MacGregor's Auctions
Doll's House Restaurant	J Birrell of St Andrews Ltd	Mostyn McKenzie
William S Duncan	Jusrite Women's Clothing	P M Choice Foods
Quarto Bookshop	Top Drawer	Craigmore Guest House
Reith's Outfitters	Albany Hotel	Deveron House
Pizza Connection	Amberside Guest House	Doune House
St Andrews Garden Centre	Annandale Guest House	Drumoig Hotel
St Andrews Fine Art	Ardgowan Hotel	Dunvegan Hotel
St Andrews Taxis	Aslar Guest House	Feddinch Mansion House
Susan Sloan Boutique	Bellcraig Guest House	Five Pilmour Place

Wilkie Ltd	Brownless Guest House	Glenderran Guest House
Ziggy's Restaurant	Burness House	Inn on N street
Wind and Water	Charlesworth House	Links Hotel
Cleveden House	Pinewood Country House	Scores Hotel
Lorimer House	Riverview Guest House	St Andrews Golf Course
Montague House	Rufflets Hotel	West Park House
Old Station Country House	Russacks Hotel	White Croft Guest House
Pilmour Hotel	Russell Hotel	Yorkston House

Appendix 3: Tourism Impact Model

Model background

Hall Aitken originally developed its Tourism Impact Model to support the 2001 study “The Economic Impact of Tourism in St Andrews”, based around the 1998 St. Andrews baseline study (EKOS). The main factors driving the model’s development were:

- The need to produce outputs across four scenarios;
- The ability to incorporate both quantitative and qualitative impacts;
- The need to achieve consistency with the approach adopted in the 1998 baseline study;
- The importance of embracing uncertainty over likely future values of key model variables such as visitor numbers, average spend – in essence, we can only ‘best guess’ what these will be, using previous trends and local knowledge as a guide;
- The transparency of model assumptions; and
- The ability to generate outputs quickly.

Quantitative model impacts were restricted to full-time equivalent (FTE) jobs and tourism expenditure. FTE jobs were calculated at a St. Andrews level, Fife level and Scottish level, taking respective displacement values into account.

Given the inherent uncertainty in predicting future values of key tourism impact variables such as number of visitors or expenditure, it was also important to ensure that quantitative outputs from the model reflected this uncertainty.

Model approach

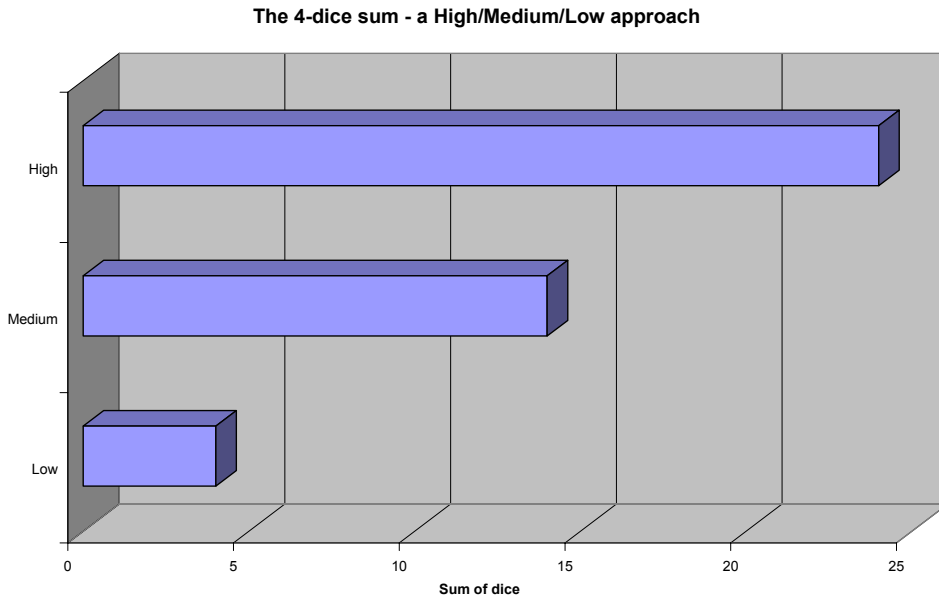
The approach adopted in developing the model embraces the inherent uncertainty about future values of key variables such as visitor numbers and expenditure levels. Put simply, we don’t know exactly how many visitors will come to St. Andrews in future, although we can make a reasonable guess using previous trends and building in the knowledge of local experts.

Traditionally, a model covering such uncertainty would have 3 values for every result output - a high (best-case), a medium (middle-case) and a low (worst-case). While this identifies the possible range of values, it does not allow any prediction of how likely or unlikely a particular result may be. We can state with certainty the best-case and worst-case are highly unlikely (unless you are either very lucky or very unlucky). The middle-case is usually chosen as the most likely value; although again there is no indication of how likely it is the value of the output will be within a stated range of this middle value.

In our approach, the model runs 1000 times. The value of key variables in each run is generated randomly, within the specified limits prescribed (for example visitor expenditure for day visitors may be allowed to vary randomly between £10.00 and

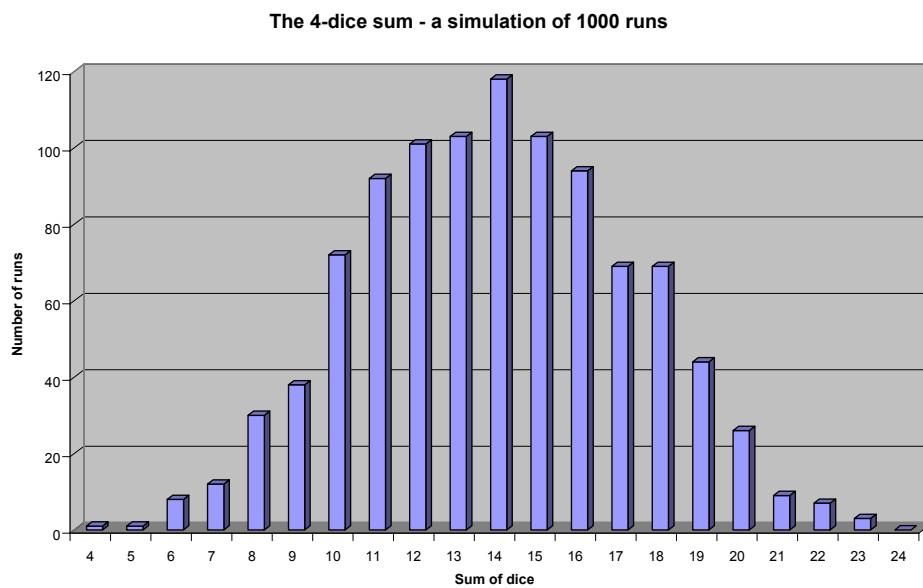
£12.00). Not only does this method provide results which show how likely a particular output value will be, it allows detailed examination of the interplay between variables.

The approach is best described further using a simplified example. Suppose we throw 4 dice and sum the values of each die. The following results would be obtained, using a high-medium-low approach:



This approach therefore shows the lowest possible value is 4, the medium value is 14 and the highest possible value is 24 (which is as expected).

The approach adopted in our model is explained in the output below:



1000 runs were made, where in each run 4 numbers were summed, with each individual number randomly allocated a value of 1,2,3,4,5 or 6. The range is identical to that achieved in the high-medium-low approach, although we can now undertake a more rigorous analysis of the output and state with some degree of confidence the range within which we expect the true value.

The example given is a simple construct to explain the approach. However, in our tourist impact model, where many variables are inaccurately known and the relationship between them is more complex than our simple example, the value of the simulation approach adopted (performing a large number of runs) becomes clear.

Appendix 4 – Progress table

The table below gives an overview of progress at the time of our research. It is based on SAWC Operating Plan 2005-7 and contains update information from various sources.

STRATEGIC THEME – PEOPLE

Action	Start Date	End Date	Outputs/ Outcomes	Specific Targets/Progress	
1	"People" Working Group to meet regularly	09/05	03/07	Delivering actions as set out below, keeping momentum going	A minimum of 12 meetings to be held between 07/05 and 12/06 On target
2	Recruitment of new working group members	09/05	11/05	New ideas, experience and differing perspectives brought to group	A minimum of 3 new members recruited Achieved
3	Plan, promote and deliver a new programme of skills and service training for businesses	09/05 01/06	03/06 05/06	Improving customer care and specific skills	Promotion of training courses to start in 11/05, delivery to be 01-03/06 Ongoing
4	Consider new national tourism training programme and its suitability for St Andrews	09/05	09/05	Improving customer care and specific skills	Deliver a pilot programme in St Andrews by end 09/05. Achieved
5	Plan and carry out survey of local employers to find out recruitment and retention issues	09/05	11/05	Empirical evidence of the scale and nature of recruitment and retention problems	Evidence collated by 11/05 Achieved in 12/05
6	Preparation and implementation of "recruitment and retention" action plan	12/05	01/06 03/06	Action plan carried out	Under way but late. Springboard Scotland's "Right Staff" workshop held on 13/2/06
7	Plan, promote and deliver a major employers' event. This aims to provide employers with information about help available from public agencies, and find out what help businesses need	09/05	02/06	Event delivered by 02/06	Not achieved by 02/06. Now planned for autumn 06
8	Follow-up workshops, individual sessions for employers (following Action 7 above)	02/06	12/06	Cannot be prescriptive at this stage about what might be delivered	Now planned for autumn-winter 06

9	Examine transferability of "Open Championship training" ideas for use at Dunhill Trophy/2007 Open	09/05	09/05	Report to be prepared for working group	Achieved – information passed to Carnoustie Open organisers
10	Examine in more detail the possibility of setting up a St Andrews "Skills Academy" (advice to be sought from Edinburgh Retail and Services Academy)	09/05	01/06 06/06	Study outlining the business case for a Skills Academy	Late - business case study commissioned 03/06 to be finished 06/06
11	Working with school pupils	11/05	03/07	Encouraging local young people to take up careers in hospitality	Preparation and delivery of a "mini action plan" On target
12	"People" Working Group members to take part in Destination Management Organisation learning	09/05	08/06	Improving knowledge and understanding, before a possible St Andrews DMO being set up by 2007	Currently on schedule – learning event planned for spring/summer 2006
13	Consideration of other ways of extending community engagement with SAWC	09/05 03/06	Continuing	Outcomes will depend on ideas created – the aim is to broaden community buy-in and participation in SAWC.	Ongoing
14	Consideration given to setting up SAWC "Community Fund" and then – if completed – managing such a fund	10/05 04/06	On-going	Financial support given to small-scale, community-led projects which are in keeping with the "World Class" vision.	Delayed – People Group agreed to postpone making a start on this until early 2006

STRATEGIC THEME – PLACE

Action	Start Date	End Date	Outputs/ Outcomes	Specific Targets/Progress
Physical Infrastructure				
Bruce Embankment improvements			Improving the quality of the public realm in the area around the Royal & Ancient Clubhouse	Completed
South Street phase 1				Completed
Doubledykes Road resurfacing works				Completed
Kinburn Park car park				Completed
City Road Junction				Completed
15 Golf Place streetscape	09/05	09/05	Enhanced environment	Completed in 02/06

16	St Mary's Place environmental improvements			Enhanced environment	Part of bus station-Market St "corridor of improvements". Scheduled to start early 2007
17	Old Guardbridge Road	09/05		New lighting, footways and car parking	Due to be completed July 06
18	West Sands environmental improvements	09/05	09/05	Completion of feasibility study reporting on environmental and technical issues and make some proposals for upgrading	Feasibility study completed by end June 06. Delivery depending on funding consultation
19	Appropriate individuals involved in "Place" projects to take part in Destination Management Organisation learning	09/05	08/06	Improving knowledge and understanding, before a possible St Andrews DMO being set up in 2007	Currently on schedule – learning event planned for spring/summer 2006
20	Market Street environmental improvements		On-going	Enhanced environment and "pedestrian favoured" street	Scheduled to start end of 2007
21	Bruce Embankment public toilets			Enhanced facilities	Potential project
	Petheram Bridge car park upgrade				Completed
22	Petheram Bridge reconstruction (technical/materials study has already been prepared)	11/05	On-going	Better and safer pedestrian linkages	Programme of consultation/planning being drawn up
23	St Andrews Harbour area	09/05	On-going	Enhanced environment; new businesses	Feasibility stage & ongoing consultations
	Transport				
25	Bus Station redevelopment	09/05	09/06	Upgrading of infrastructure, access and information; installation of CCTV and link road	Work under way, some contractor delays
26	Develop and implement Fife Council's Town Centre Parking Action Plan (dependent on Fife Council Committee approval and subsequent public consultation)	09/05		Implementation of Parking Action Plan	Ongoing
27	Planning and securing funding for new Park and Ride site at North Haugh (dependent on Fife Council Committee approval, availability of	09/05	on-going	New 500-space Park and Ride car park	Early discussions held – a long-term project

	funding and subsequent public consultation)				
28	Leuchars Rail Station and public transport links with St Andrews (Subject to funding bid success	01/06	on-going	Plans include 4-times hourly bus link, station upgrades, extra parking	Ideas being progressed

STRATEGIC THEME – PRODUCT

Action	Start Date	End Date	Outputs/ Outcomes	Specific Targets/Progress	
30	"Product" Working Group to be established and then to meet regularly	02/06	Delivering actions as set out below, keeping momentum going	A minimum of 10 meetings to be held between 08/05 and 12/06 First meeting was in Feb 06	
31	Recruitment of new Working Group members	02/06	04/06	New ideas, experience and differing perspectives brought to Group	Ongoing
32	Working Group to determine its own Action Plan for 2005-06, incorporating actions 33-37 below but also adding new ones			Action Plan agreed	Under development
33	"Wireless Town" Initiative	09/05	12/06	Universal wireless broadband provision throughout St Andrews	Commercial partner to be sourced SE Fife is taking this forward
34	Gateway Building visitor orientation facility	09/05	04/06	Stage 1: static display boards/ Stage 2: IT-based interactive terminals	Stage 1 will be completed by summer 06
35	Review of visitor information/orientation provision around town	02/06		Preparation of report and recommendations for implementation	Ongoing
37	"Product" Working Group members to take part in Destination Management Organisation learning	09/05	08/06	Improving knowledge and understanding, before a possible DMO being set up in 2007	Currently on schedule – learning event planned for summer 2006
38	Continuation/extension of projects delivered by existing Golf Development Group	09/05	current	Golf Group will set its own outcomes	Golf Group to provide regular information on progress to Executive Group On target
29	Implementation of St Andrews signposting strategy	02/06	12/06	Strategy carried out	Under development

STRATEGIC THEME – PROGRESS

Action	Start Date	End Date	Outputs/ Outcomes	Specific Targets/Progress	
39	Monitoring of progress with each of the actions in this Action Plan	09/05	03/07	Ensuring that progress is maintained; providing an early warning if there are problems	Reports to be given to Executive Group if any problems with implementing actions are encountered On target
40	Regular diet of news releases issued	09/05	03/07	Providing information and positive news about the work of SAWC	Minimum of 30 news releases issued between 08/05 and 12/06 Ongoing
41	Presentations about SAWC given to local organisations	10/05	03/07	Providing information and positive news about the work of SAWC	Seek invitations to give presentations. All invitations to be accepted. Ongoing
42	Take forward "World Heritage Status" proposals	09/05	on-going	Finding out the detailed ramifications of mounting a bid for World Heritage Status.	Under way – open meeting Feb 06, further discussions ongoing
43	Executive Group members to take part in Destination Management Organisation learning	09/05	08/06	Improving knowledge and understanding, before a possible St Andrews DMO being set up in 2007	Currently on schedule – learning event planned for summer 2006

OTHER ACTIONS

Action	Start Date	End Date	Outputs/ Outcomes	Remarks	
44	Secure required funding and recruit Initiative Manager	09/05	10/05	Providing the Initiative with guaranteed co-ordination and administration until 03/07	Funding secured Nov 05, appointment made Jan 06
45	First meeting of SAWC Ltd	09/05	09/05	Registration of company, selection of other directors	Achieved on schedule
46	Appointment of other directors to SAWC Ltd and second Board meeting	10/05	10/05	Determination of the objectives and activities of the company	Achieved Dec 05
47	Further meetings of SAWC Ltd as needed	11/05	03/07	Delivering the company's determined objectives	Ongoing
48	Planned initiation of, and	09/05	11/05	Ambassadors given	Not yet achieved

	public announcement about, SAWC Ambassadors			clear roles/tasks to perform	
49	Establishment of SAWC office	09/05	10/05	Providing a physical presence and central point of contact for the Initiative within the town	Achieved Feb/Mar 06

Appendix 5 Interviewees

Stakeholders interviewed before 21/03/06

Patrick Laughlin – St Andrews World Class Ltd

Lindsay Adam – Bonkers Gift Shop

Stephen Carter – St Andrews Bay Hotel

David Corner – University of St Andrews

Mike Henretty – Hazelbank Hotel

Alan Graham – VisitScotland

Alan McGregor – St Andrews Links Trust

Stuart Nicol – Fife Council

Jonathan Stapleton – Old Course Hotel

Jimmy Macgregor – St Andrews Preservation Trust

We also spoke to and followed up by e-mail with

Ewan Chirnside – Director of Research & Enterprise Services at University of St Andrews

SE Fife staff interviewed

Gail Sibbald, SE Fife (completed 27/03/06)

Keith Robertson, SE Fife (completed 18/05/06)

Martin Grigg, SE Fife (completed 18/05/06)

Carl Gardiner, SE Fife (completed 27/03/06)

Contact details

Scottish Enterprise Fife

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Title	St Andrews World Class Mid-term evaluation
Version	Final
Date	August 2006
File location	194 Final Report Final

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