



Insight Department:
Fife Factsheet | 2019

Published: January 2021



Introduction

Background Information and Aim

This report provides a summary of statistics on tourism in Scotland's Fife region. It gathers information from a suite of tourism monitors managed by VisitScotland's Insight Department, and other national statistics and commissioned research.

Most of the statistics are produced from surveys. The primary surveys used are:

- **The Great Britain Tourism Survey** (GBTS) that provides data for overnight visitors resident in Scotland, England and Wales. The survey is conducted through face-to-face interviews and is jointly commissioned by VisitScotland, VisitEngland and VisitWales. More information about the survey can be found on visitbritain.org.
- **The International Passenger Survey** (IPS) which is run by the Office for National Statistics (ONS). This survey provides data for overseas visitors. Details about the survey and methodology used can be found on the ONS website and the VisitBritain website.
Please note: In 2020, the methodology of IPS was revised to represent more accurately international visitors and all data was recalculated back to 2009. As a result, international figures in this report might differ from, and supersede, previously published IPS data.
- **The Great Britain Day Visits Survey** (GBDVS) that provides data for tourism day visitors resident in Scotland, England and Wales. More information about the survey can be found on visitbritain.org.
- **The Scottish Accommodation Occupancy Survey** (SAOS) that provides data on occupancy in Scotland's tourist accommodation sectors.

While results from these surveys can give good precision at national level, at regional level they can be less reliable because they can be based on a relatively small sample size. This incurs a larger margin of statistical error reducing data reliability. Therefore results should be treated with caution.

To reduce error margins, it is sometimes useful to take an average over three years to provide a larger sample size. In this report, 3-year average figures have been calculated to provide a more robust basis for analysis of detailed data such as visitors' region of residence, purpose of travel, or seasonality of trips.

Annual visitor figures are provided on pages 6 and 7, as well as in the form of a historical trend chart on page 9. These ensure the publication is consistent with other regional factsheets published on visitscotland.org and indicate changes in tourism performance over time. Yet, it is recommended to refer to the 3-year average figures on page 3 when analysing volume and value of tourism in the region.

There are some differences between regions as identified by the GBTS and GBDVS, IPS, and SAOS.

This report starts with an **overall** evaluation of Fife tourism performance in 2019. It then looks in more detail into the **international** and **domestic** overnight visitors to the region. Lastly, the report focuses on tourism day visits and the historical trend of tourism performance in the region since 2013.

Sources

- Great Britain Tourism Survey (GBTS) 2019
- International Passenger Survey (IPS) 2019
- Great Britain Day Visits Survey (GBDVS) 2019
- Scottish Accommodation Occupancy Survey (SAOS) 2019
- Moffat Centre Visitor Attraction Monitor (VAM) 2019
- Scottish Annual Business Statistics (SABS): Sustainable Tourism by Local Authority Area 2018

I. Overall Tourism in Fife

Latest Figures

Craigtoun Country Park
© 2021 VisitScotland / Damian Shields

Overall Tourism Summary: Visits, Nights and Spend in Fife, 2017-2019 Annual Average Figures

VISITS BREAKDOWN	Visits		Nights		Spend	
	2017-19 Average (000s)	% Change 2016-18/2017-19	2017-19 Average (000s)	% Change 2016-18/2017-19	2017-19 Average (£m)	% Change 2016-18/2017-19
Europe	51	-4%	207	-9%	24	+9%
North America	64	+5%	430	+6%	52	-4%
Rest of World	18	-12%	87	-72%	14	-28%
Total International Overnight	134	0%	724	-23%	90	-6%
Scotland	344	+15%	875	+22%	54	+36%
Rest of Great Britain	227	-6%	977	+5%	58	+6%
Total Domestic Overnight	571	+6%	1,853	+12%	112	+19%
Total Overnight Tourism	705	+5%	2,577	-1%	202	+7%
Total Day Tourism	8,642	+7%	N/A	N/A	306	+39%
Grand Total	9,347	+7%	2,577	-1%	507	+24%

Sources: IPS/GBTS/GBDVS, 2017-19. Figures may not sum up due to rounding.

National figures are available in the *Key Facts on Tourism in Scotland 2019* report published on visitscotland.org.

Visitors to Fife

Tourism Performance | 2019

2019 was a very good year for overnight tourism in Fife. Annual figures suggest that the number of trips was well **above the average** for the 2013-2018 period, while overnight expenditure was the **highest** in seven years.

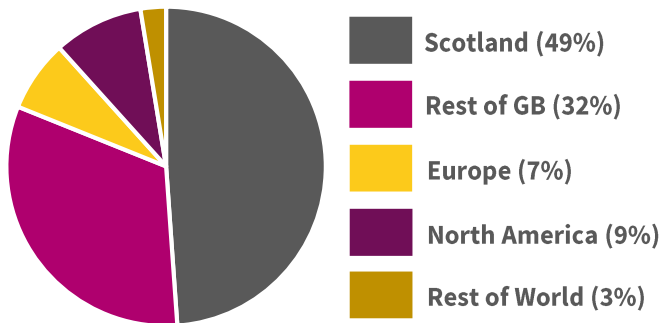
Between 2017 and 2019, Fife attracted **705,000 overnight visits** per year, a 5% increase from 2016-2018. At **2.6 million, bednights** decreased slightly by a percent. However, overnight tourism expenditure in the region grew by 7% to reach **£202 million** per year in 2017-2019.

The growth in overnight trips to Fife was driven by a significant **rise in Scottish travellers**, and to a lesser extent by an increase in North American visitors. Residents of Scotland were also largely responsible for the **growth in overnight expenditure** in the region. Between 2017 and 2019, they spent £54 million per year during overnight visits to Fife, a 36% increase from 2016-2018. Expenditure of English and Welsh visitors was slightly higher at £58 million per year, but grew more moderately by 6%.

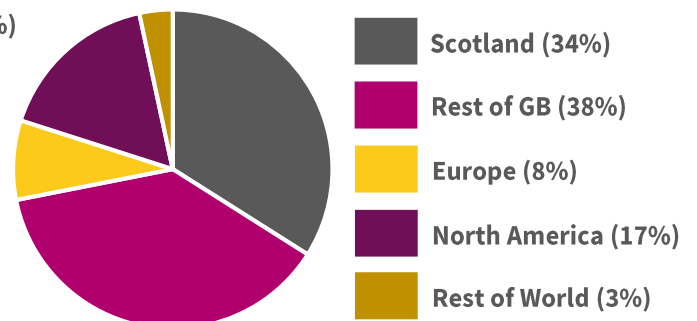
As a result of these increases, Scottish residents made **nearly half of all overnight trips** to Fife in 2017-2019. While overseas travellers accounted for less than a fifth of the trips, they generated **45% of the overnight tourism expenditure** in the region over the same period.

Domestic day tourism in Fife also grew, with day trips reaching **8.6 million** per year in 2017-2019. A big rise in day spend resulted in net tourism expenditure of more than **half a billion pounds** per year.

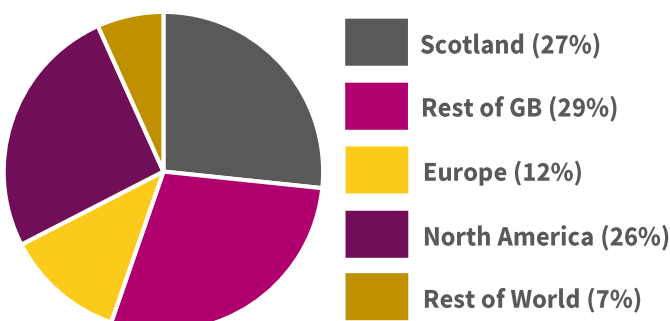
Overnight Visits



Nights



Overnight Spend



Sources: GBTS/IPS, 2017-19. Figures may not sum up due to rounding.

Regional Tourism Performance

Local Statistics

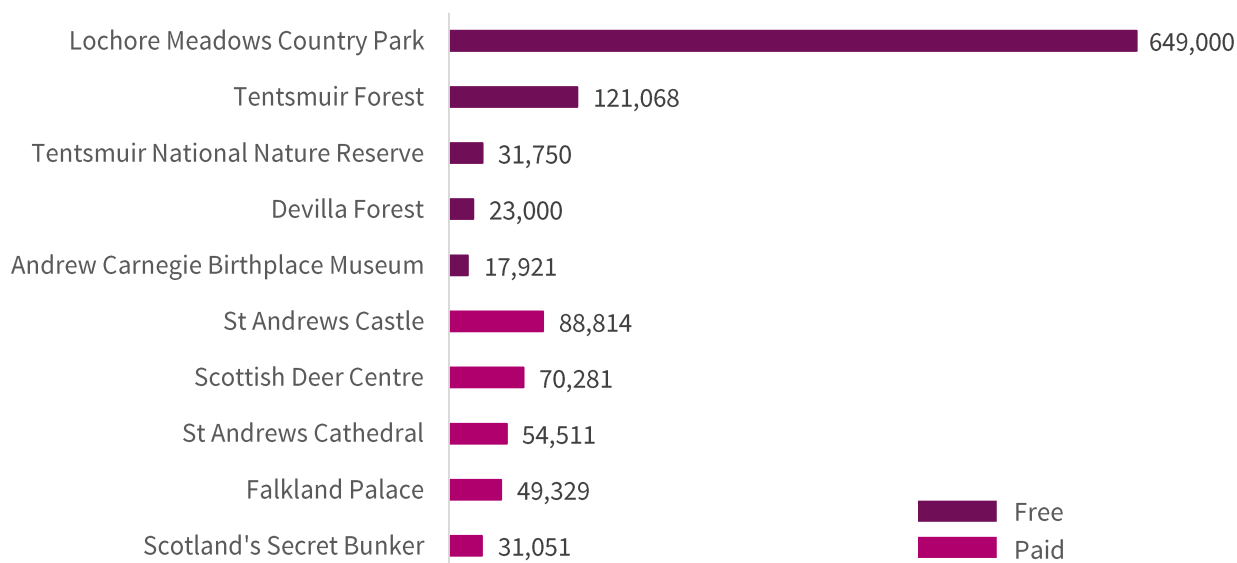
Regional Sustainable Tourism* – Business Units, Employment and Gross Value Added, 2018

Local Authority/ Region	Units		Employment		GVA	
	Number	% Change 2017/18	(000s)	% Change 2017/18	(£m)	% Change 2017/18
Fife	968	0%	11.1	+4%	302	+30%

Source: SABS, 2018. Figures may not sum up due to rounding. For more information, visit visitscotland.org.

*The Scottish Government defines sustainable tourism as a growth sector including a number of business types [detailed on their website](#). Latest statistics were published on 24th June 2020 and cover the period up to 2018.

Top Five Free and Paid Visitor Attractions in Fife (with Visitor Numbers), 2019



Source: Moffat Centre Visitor Attraction Monitor, Glasgow Caledonian University, 2019.

VAM is solely owned and distributed by Glasgow Caledonian University Moffat Centre. If you are interested in participating in the accompanying survey or subscribing to the publication, please contact info@moffatcentre.com.

Occupancy Rates by Accommodation Type and Month, Fife 2019

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Hotel (Room Occ.)	41%	47%	50%	68%	82%	78%	80%	86%	81%	75%	55%	45%	66%
Self-Catering (Unit Occ.)	29%	25%	33%	53%	46%	56%	82%	60%	59%	53%	48%	33%	51%

Source: SAOS, 2019.

II. International Visitors to Fife

Overnight Tourism

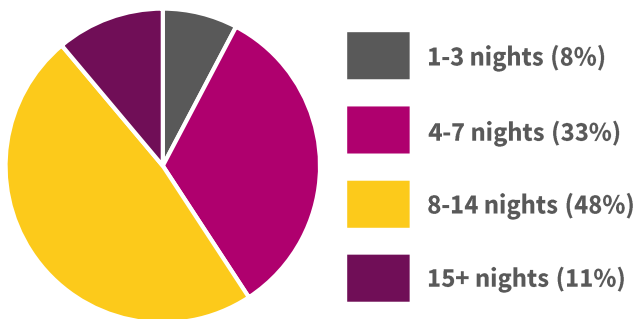
International visitors made **134,000 overnight trips** per year to Fife between 2017 and 2019. While this is **identical** to the estimate for the 2016-2018 period, **bednights dropped** by nearly a quarter suggesting a decline in visitors’ average length of stay. Despite that, at £671, average spend per visit was the **highest** among all of Scotland’s regions in 2017-2019. This is largely due to the high proportion of long-haul visitors to Fife who tend to spend more money during their trip. **North American** residents, in particular, accounted for 48% of all trips to the region in 2017-2019 – again, the highest across all Scottish regions.

International Tourism Performance, 2019 and 2017-19 Annual Average Figures

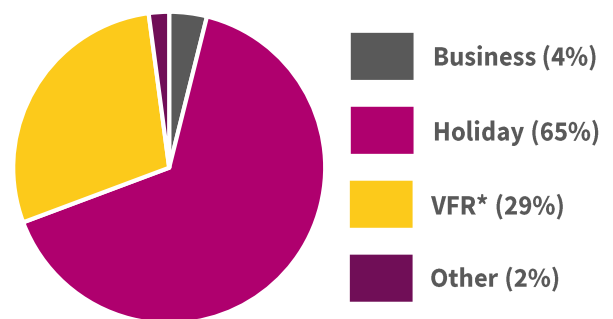
Indicators	Scotland		Fife			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019*	% Change 2018/19*	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	3,460	-7%	121	-23%	134	0%
Spend (£M)	2,538	+7%	92	+13%	90	-6%
Nights (000s)	27,385	+8%	528	-24%	724	-23%
Average length of stay	7.9 nights	+16%	4.4 nights	-1%	5.4 nights	-23%
Average spend per day	£93	0%	£174	+49%	£124	+23%
Average spend per visit	£734	+15%	£761	+47%	£671	-6%

Source: IPS, 2019. *Annual Fife data is based on relatively low sample sizes.

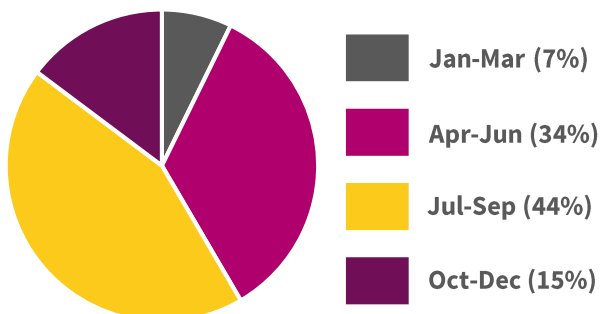
Duration of Stay



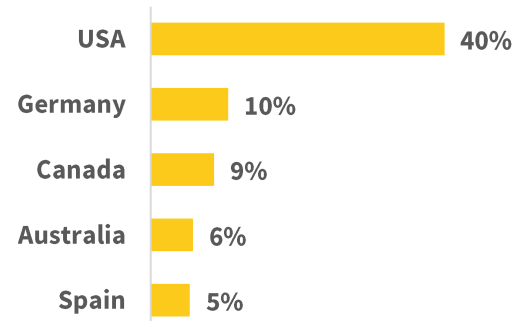
Purpose of Travel



Seasonality



Top 5 Overseas Markets**



Source: IPS. All charts are based on 3-year average data (2017-2019).

*VFR = Visiting friends or relatives. **Based on relatively low sample sizes.

III. Domestic Visitors to Fife

Overnight Tourism

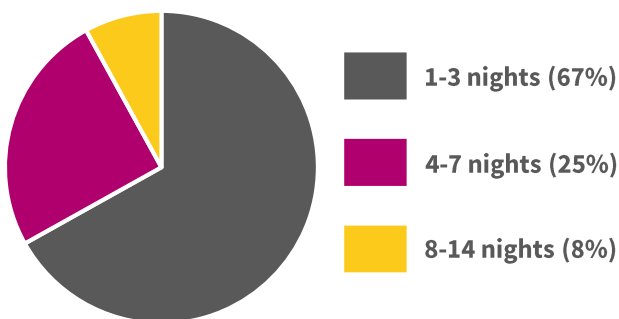
The volume and value of **domestic overnight tourism** to Fife **increased** in 2017-2019. British residents made 571,000 trips per year to the region (+6%), spending 1.9 million nights (+12%) and £112 million (+19) annually. Average spend rose from 2016-2018 but remained below the national average. This can be largely explained by the high proportion of travellers **visiting friends and relatives** who made 36% of all domestic trips to the region in 2017-2019. They also contribute to the relatively **even seasonal spread** of travel to the region, where only the first quarter of the year welcomes less visitors. Half of all domestic visits to Fife in 2017-2019 were made by people over the age of 55.

Domestic Overnight Tourism Performance, 2019 and 2017-19 Annual Average Figures

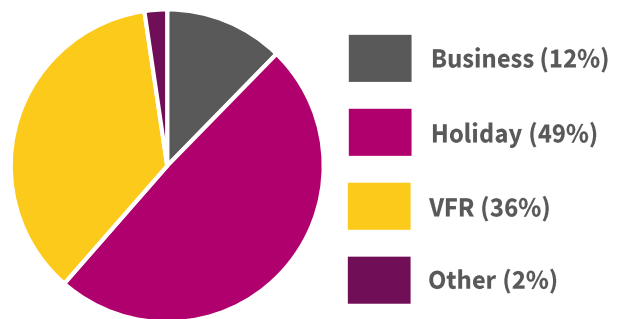
Indicators	Scotland		Fife			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019*	% Change 2018/19	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	13,810	+17%	599	+29%	571	+6%
Spend (£M)	3,200	+16%	132	+33%	112	+19%
Nights (000s)	46,413	+15%	1,965	+35%	1,853	+12%
Average length of stay	3.4 nights	-2%	3.3 nights	+5%	3.2 nights	+6%
Average spend per day	£69	+1%	£67	-1%	£60	+6%
Average spend per visit	£232	-1%	£220	+4%	£195	+13%

Source: GBTS, 2019. *Annual Fife data is based on relatively low sample sizes.

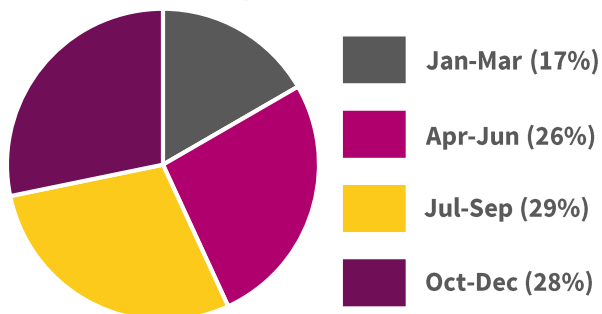
Duration of Stay



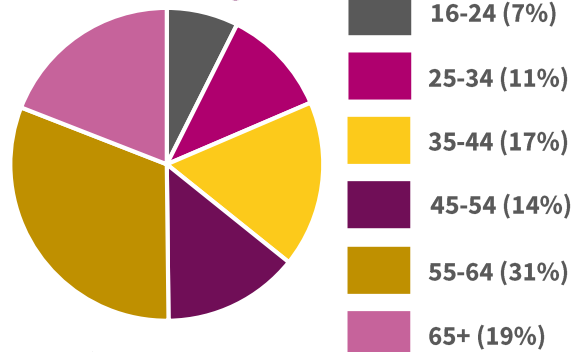
Purpose of Travel



Seasonality



Visitors' Age



Source: IPS. All charts are based on 3-year average data (2017-2019). Figures may not sum up due to rounding.

Domestic Day Visits to Fife

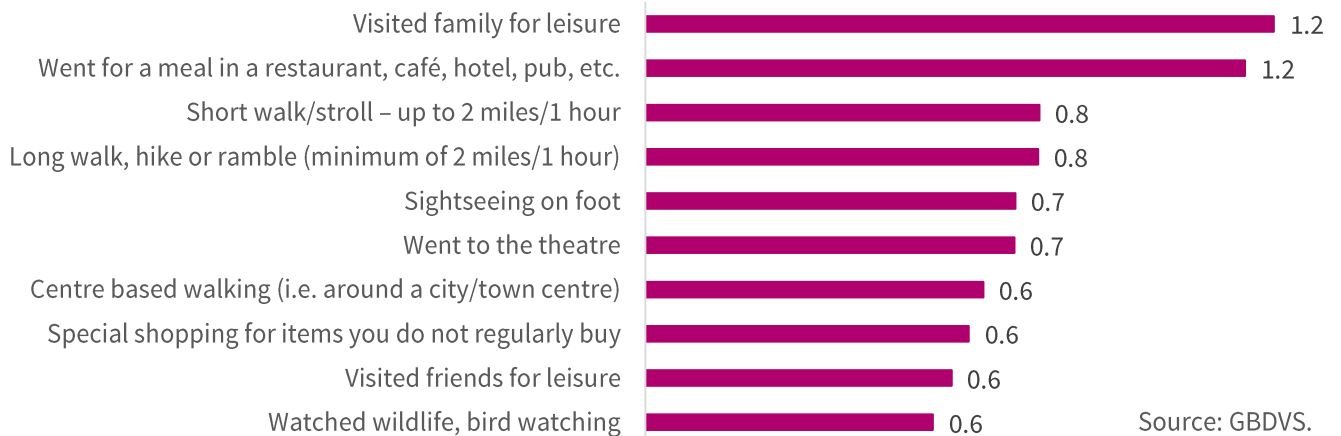
Tourism Performance and Activities

National and Regional Domestic Day Visit Tourism Performance, 2017-2019 Average Figures

	Visits		Spend	
	2017-19 Average (million)	% Change 2016-18/2017-19	2017-19 Average (£ million)	% Change 2016-18/2017-19
Scotland	140.8	-2%	5,749	+5%
Fife	8.6	+7%	306	+39%

Source: GBDVS.

Most Popular Activities Undertaken as Part of a Day Trip, Fife: 2016-18 Average Annual Figures (Number of Day Trips in Millions)



Source: GBDVS.



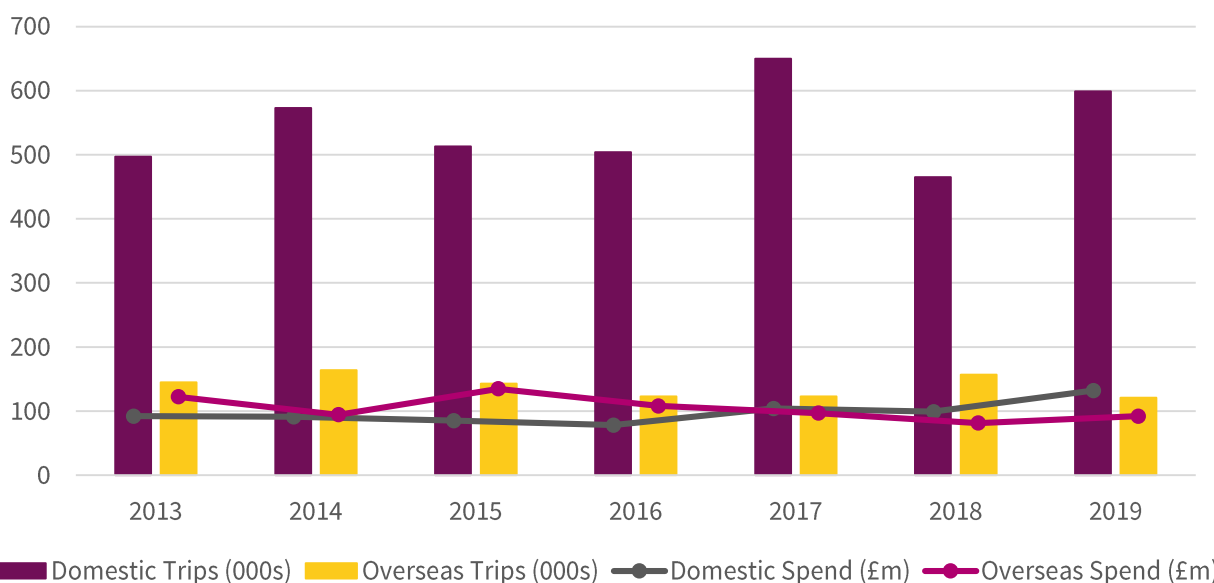
Puffins on the Isle of May
© 2021 VisitScotland / Kenny Lam

Visitors to Fife

Historical Trend Information | 2013 - 2019

The total number of overnight trips to Fife in 2019 was 720,000, **12% more** than the annual average for the **2013-2018** period. This was a result of the strong performance of domestic tourism where trips were the second highest in seven years. International visits were at their lowest since 2013 but very similar to the levels observed in 2016 and 2017. Total overnight **expenditure** in Fife was the **highest in seven years** at £224 million. In recent years, data indicates **domestic travel** is becoming increasingly important to regional tourism performance in Fife – while international spend was higher in the 2013-2016 period, British residents spent more money than overseas visitors in every year from 2017 to 2019.

Domestic and International Overnight Tourism, 2013-2019



Sources: GBTS, IPS.

Domestic and International Overnight Visits, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (000s)	497	573	513	504	650	465	599
International (000s)	145	164	143	123	123	157	121
Total Overnight (000s)	642	737	656	627	773	622	720

Sources: GBTS, IPS.

Domestic and International Overnight Spend, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (£m)	92	91	85	78	104	99	132
International (£m)	122	94	135	108	97	81	92
Total Overnight (£m)	214	185	220	186	201	180	224

Sources: GBTS, IPS.



Appendix

USING AND INTERPRETING STATISTICAL DATA

Sources: Data is sourced from the Office for National Statistics' International Passenger Survey (IPS), The Great Britain Tourism Survey (GBTS), The Great Britain Day Visits Survey (GBDVS), Scottish Accommodation Occupancy Survey (SAOS), Moffat Centre's Scottish Visitor Attraction Monitor (VAM) and ONS' Scottish Annual Business Survey (SABS).

SAMPLE SIZES

Analysis of sub-groups, such as trips by purpose or demographic group, relies on smaller sample sizes that can be unreliable. Where this is a particular issue, methods to aggregate data, such as using a 3-year average instead of single-year data, have been used. Before using the data, it is important to recognise the limitations of using a small sample size. Further information, including methodology and sample sizes, can be found on the VisitBritain website www.visitbritain.org (Insights & Statistics section).

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Back Cover: Dunfermline Abbey

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