

APPENDIX 1

THE TOURISM MARKET

The Scottish Context

Much of the information available on visitors to Scotland is highly relevant to Fife.

- The vast majority of trips to Scotland are from the UK. 44% of trips are made by Scottish visitors, 47% are from England and Wales and only 9% by overseas visitors. The UK leisure market is worth around £2.9 billion. It is increasingly a short break market (average stay - 3.6 days). There is still room for growth, as over half the population of England and Wales have never visited Scotland.
- Overseas markets are growing faster, however, and as overseas visitors stay longer (average stay 9.3 days) and spend more – 19% of the value of Scottish tourism from 9% of the trips – they are crucial to growth. North America is the biggest overseas market and is beginning to show signs of growth again. The European markets are growing most strongly, assisted by better direct air access and the Rosyth ferry. Germany remains the largest market, followed by France, but there is growing interest from Scandinavian markets, particularly Sweden, and Spain. The overseas leisure market is worth around £0.73 billion.
- UK and overseas business tourism is worth around £1 billion.
- Research shows that the most important factors in choice of Scotland as a leisure destination are our scenery, natural environment, the number of things to see and do, and the friendly attitude of local people. Other key findings area that:
 - 96% of visitors had their expectations met or exceeded, and 97% were likely to recommend their holiday experience to others
 - The authenticity of the experience is vital
 - The opportunity to interact with Scots is important, especially for North Americans
 - Common criticisms are the weather, prices/exchange rates and quality of accommodation and eating places

The Fife Market

The Volume and Value of Tourism

- Based on United Kingdom Tourism Survey (UKTS) and International Passenger Survey (IPS) it is estimated that in the 2001 – 2003 period, UK residents took some 700K tourist trips per year to Fife and spent a total of 2.7 million bednights and £124 million per year in the area.
- Visitors from overseas took 90K trips to Fife and stayed 900K bednights during 2003 with expenditure in the area totalling £49 million. The average spend per trip by overseas visitors is significantly higher than that of the UK visitor (£544 compared with £177) with overseas expenditure higher yet than the Scottish average.
- The Scottish Economic Activity Monitor (STEAM) estimates total tourism revenue of £218 million in 2005.
- Over half (56%) of all UK trips to Fife were taken by Scottish residents whilst 42% were taken by English visitors. This is in line with the trend for Scotland as a whole, with more trips taken by Scots than English tourists. With regard to overseas visitors Fife has a higher than average penetration of the US market than for Scotland as a whole (48% compared with 26%) making it by far the biggest single overseas market. EU countries account for 28% of tourism trips.

- In terms of the average length of stay during trips taken in Fife, UK residents averaged 3.9 nights, slightly longer than the average length of stay of UK trips across Scotland as a whole. UK visits to Fife were less seasonal than visits to Scotland with 30% taking place in the October to December period – 20% during January to March; 23% during April to June; 28% during July to September. Fife also enjoys a high level of repeat visits by UK visitors – 87% of UK visitors to Fife had already stayed overnight in the area at some point during the previous five years, the highest of all areas in Scotland.

The Visitor Profile

The Fife Visitor Survey was last undertaken in 2001/2002 and yielded valuable information in relation to the profile of visitors and their key influences and motivating factors.

- From the key results of the survey, it was evident that age profile of visitors to Fife is relatively old – some 34% were aged over 55 years whilst only 24% were aged under 35. The remaining 41% fell between these two age categories (aged 35 – 54). This older profile was reinforced in terms of lifecycle with “empty nesters” accounting for 45% visitors – over three times as many visitors fell into this category than young independents (13%). Families accounted for 25%. Most visitors to the area were in the ABC1 social classes with nearly three quarters of visitors (73%) falling within this socio-economic grouping.
- Highlighting the importance of the Visiting Friends and Relatives market to Fife, VFR was cited as the most popular reason for visiting Fife, mentioned by 14% in the visitor survey sample. A similar proportion of respondents mentioned specific reasons such as a sporting activity or event (13%) or to visit a specific attraction.
- The scenery and natural environment particularly the coastal features of the area were regarded as key strengths with beaches specifically cited. Fife’s heritage including its architectural features also emerged from the survey as key strengths.
- It is worth highlighting that there are significant regional variations within Fife in terms of visitor profile. For example, St Andrews had a much younger age profile among visitors, reflecting the larger proportions of overseas visitors to the town.