

LOCAL TOURISM INDUSTRY BAROMETER

Q2 (April – June) 2019



Forth Valley





This report is for:

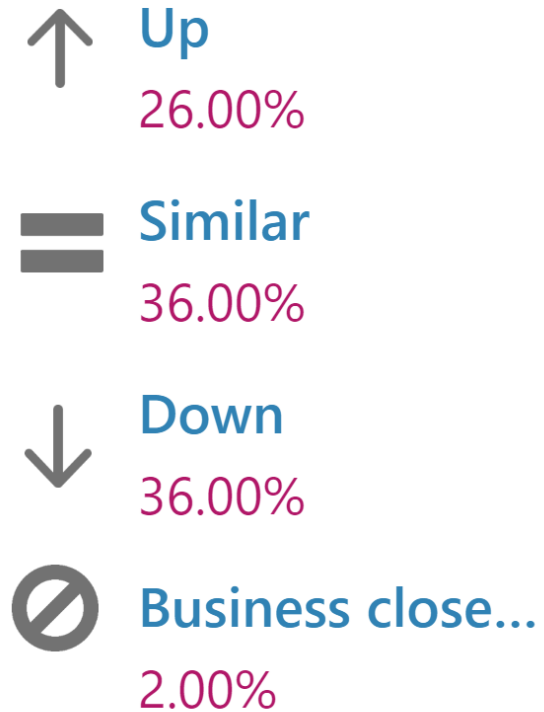
Forth Valley ∨

2019 Q2 ∨

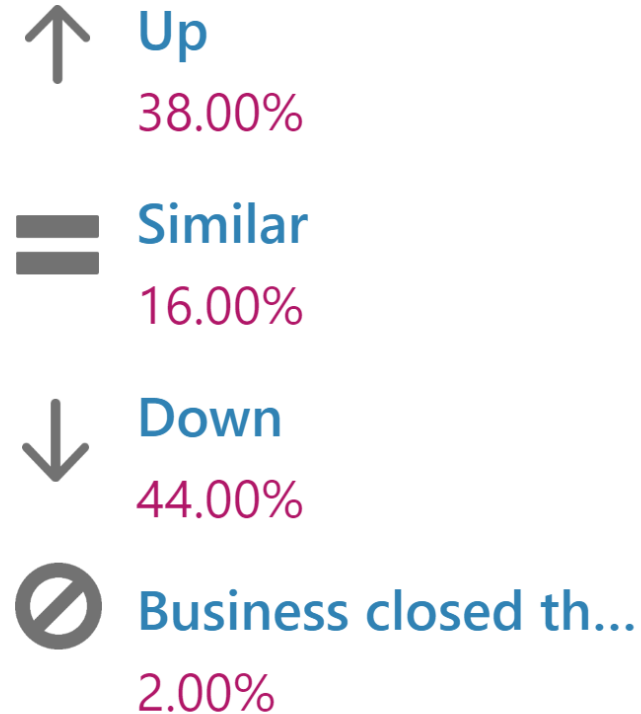
Report Sample Size

50

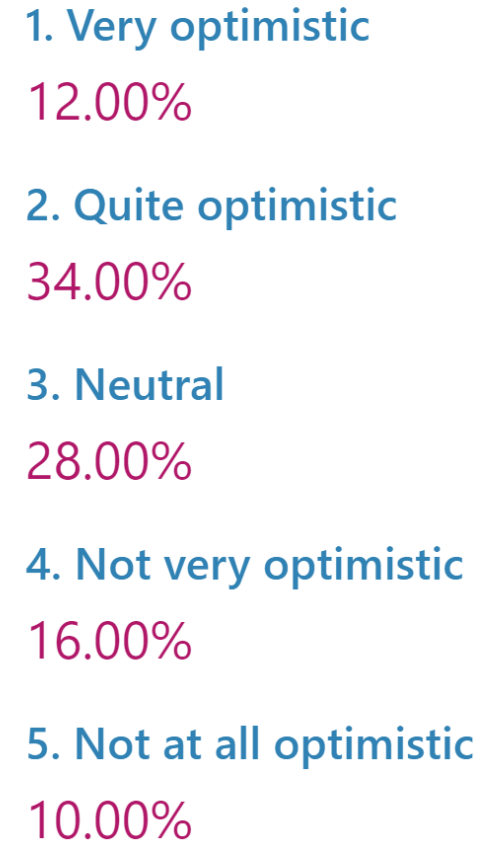
How are your **visitor numbers** compared to same quarter last year?



How does your **turnover** compared to same quarter last year?

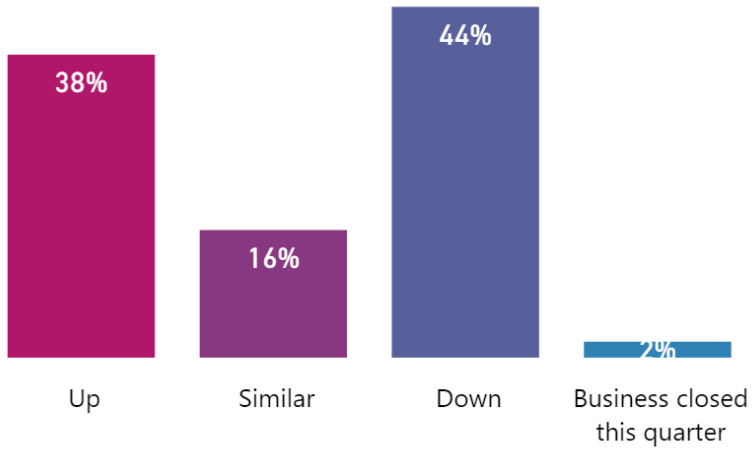


How **optimistic** are you for the next 3 months?

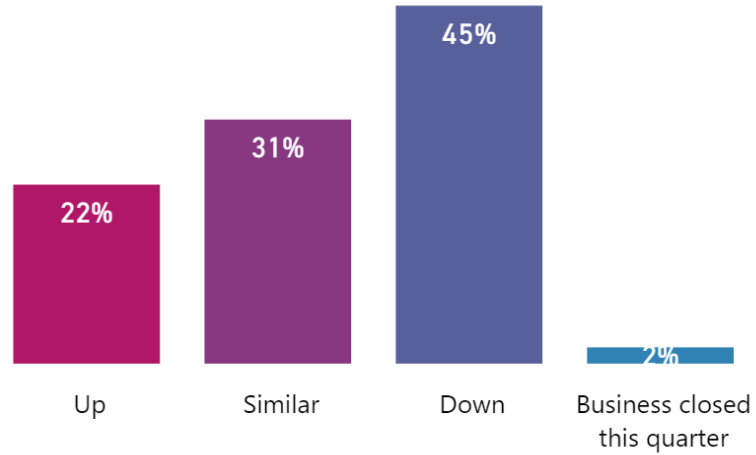


Financial Performance for: Forth Valley for: 2019 Q2

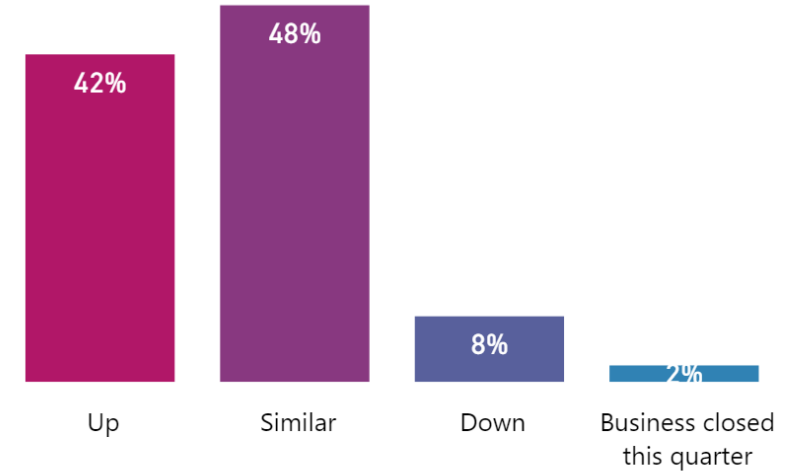
Turnover compared to same quarter last year



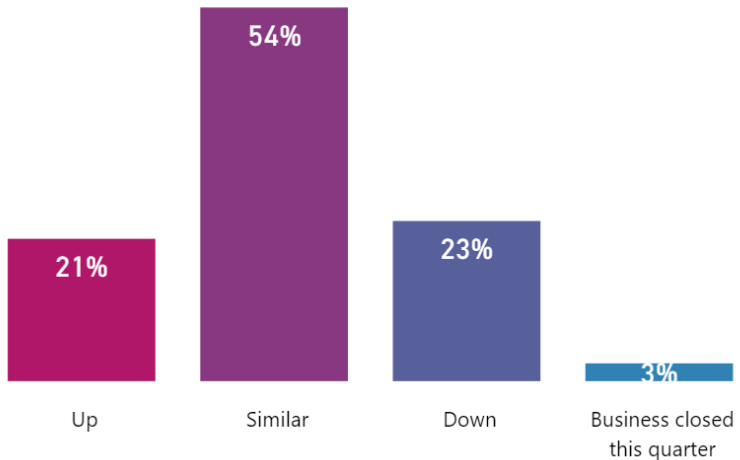
Profit compared to same quarter last year



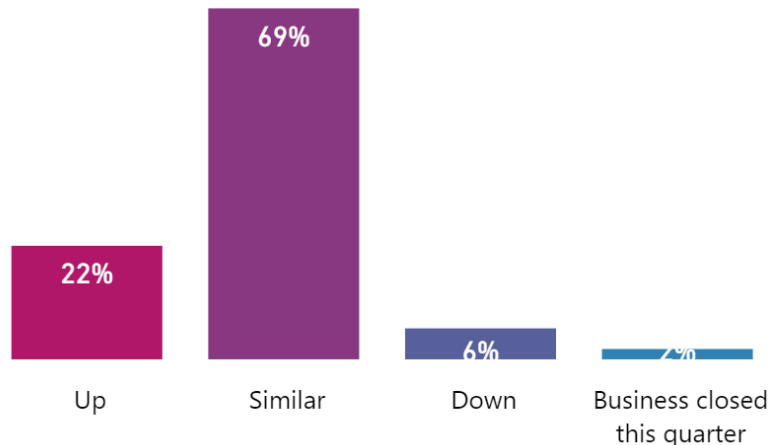
Staff costs compared to same quarter last year



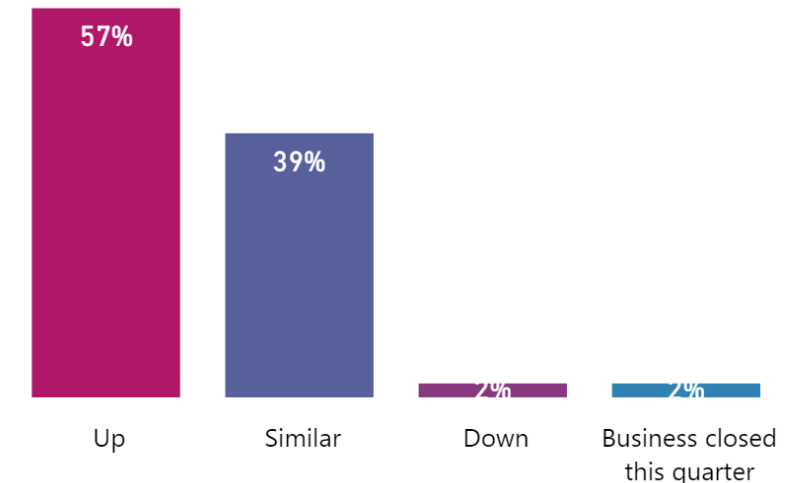
Change in discretionary income?



Prices charged compared to same quarter last year



Input costs compared to same quarter last year



Visitor Performance for:

Forth Valley

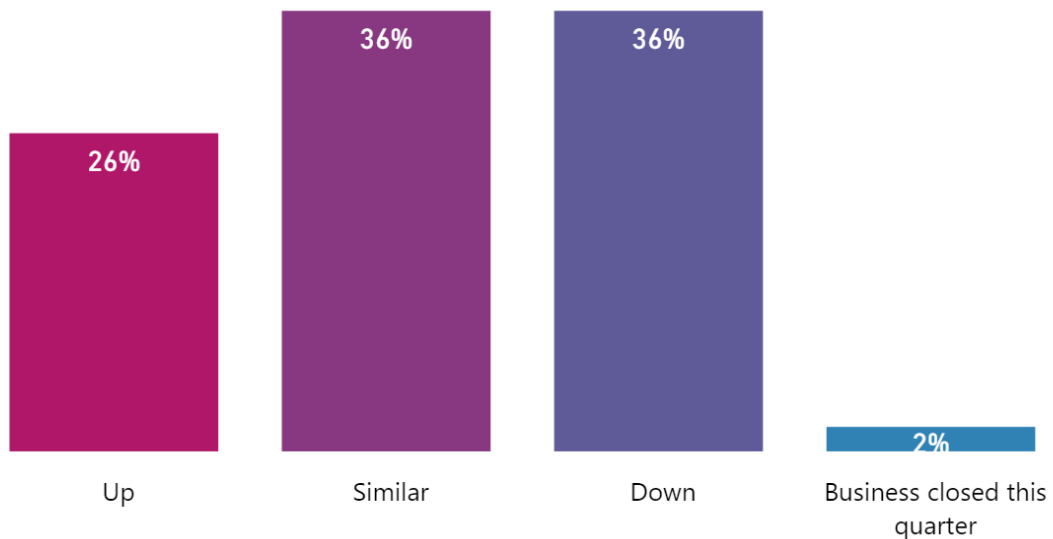


for: 2019 Q2

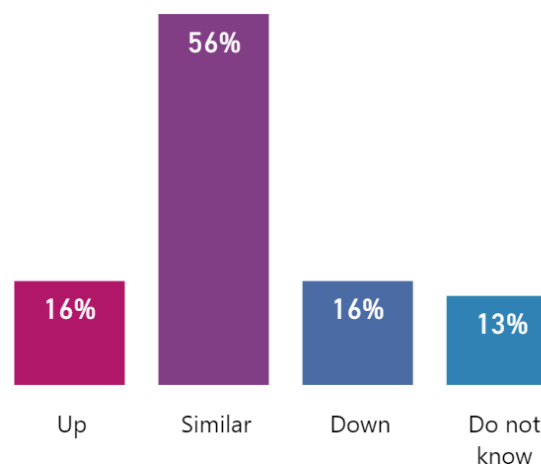


Have you seen a change in visitors from:

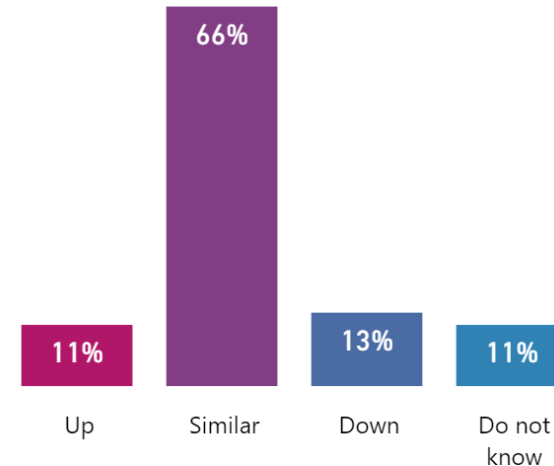
Visitor numbers compared to same quarter last year



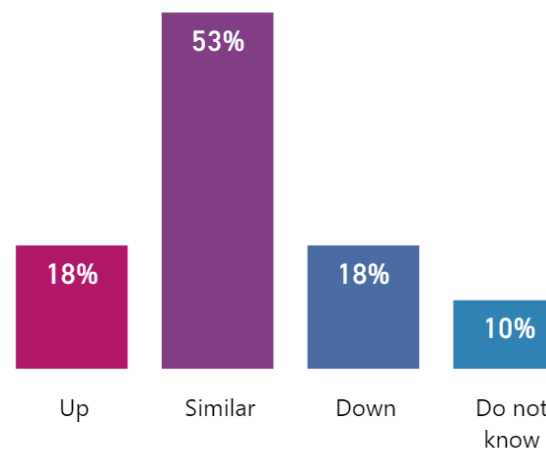
Your local area



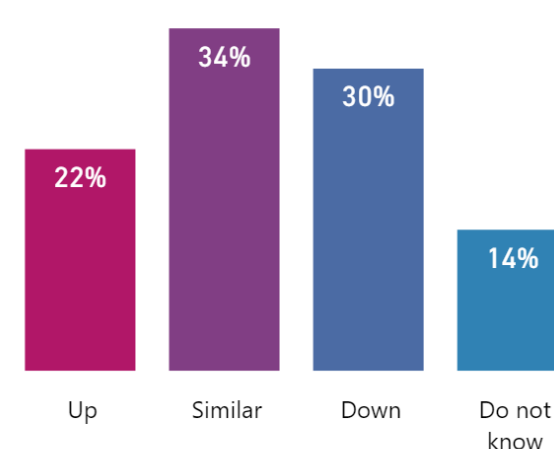
Elsewhere in Scotland



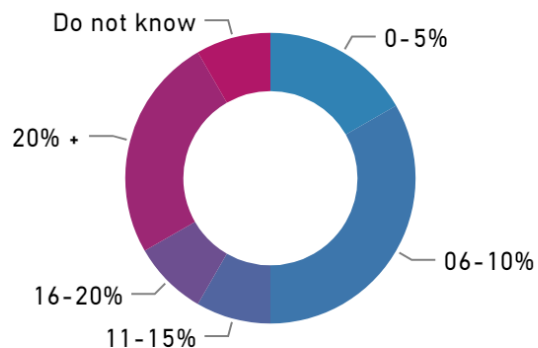
Rest of UK (England/Wales/NI)



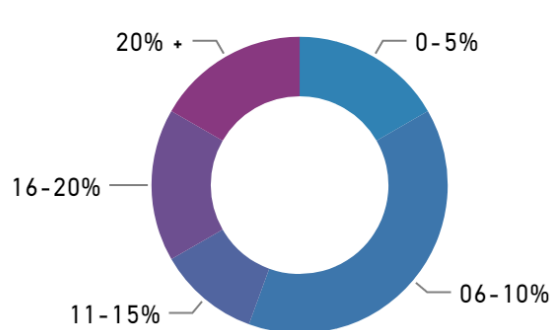
Overseas



Percentage increase in your visitor numbers



Percentage decrease in your visitor numbers



Optimism for: Forth Valley



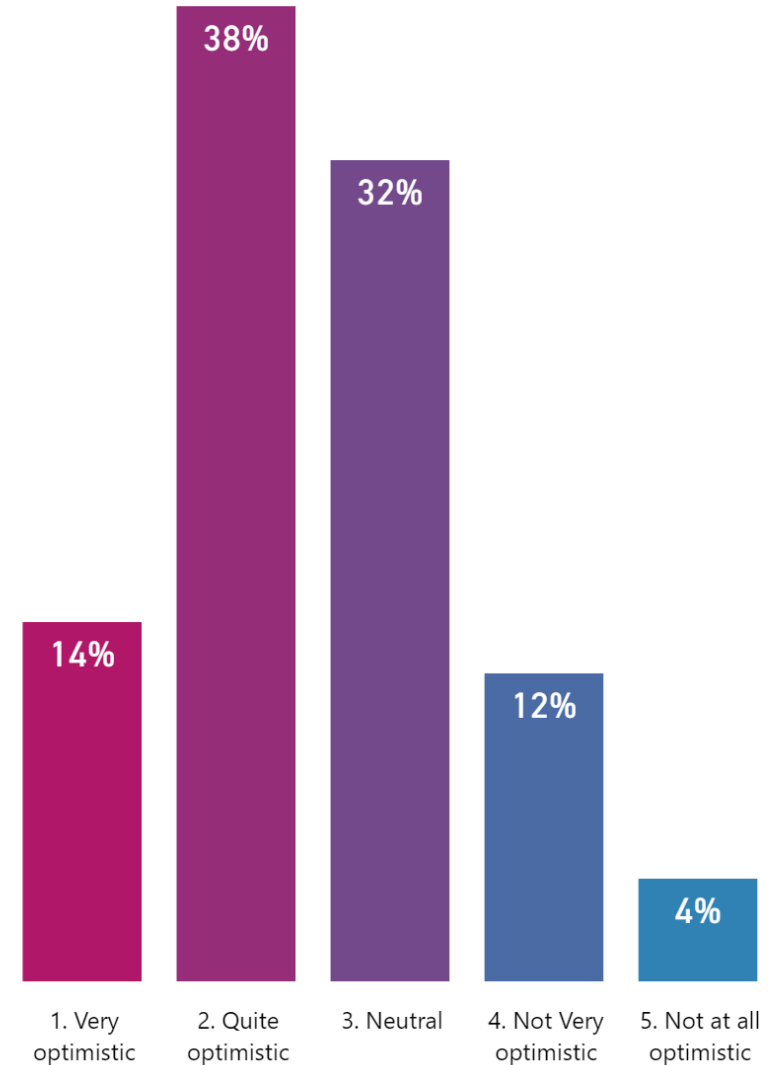
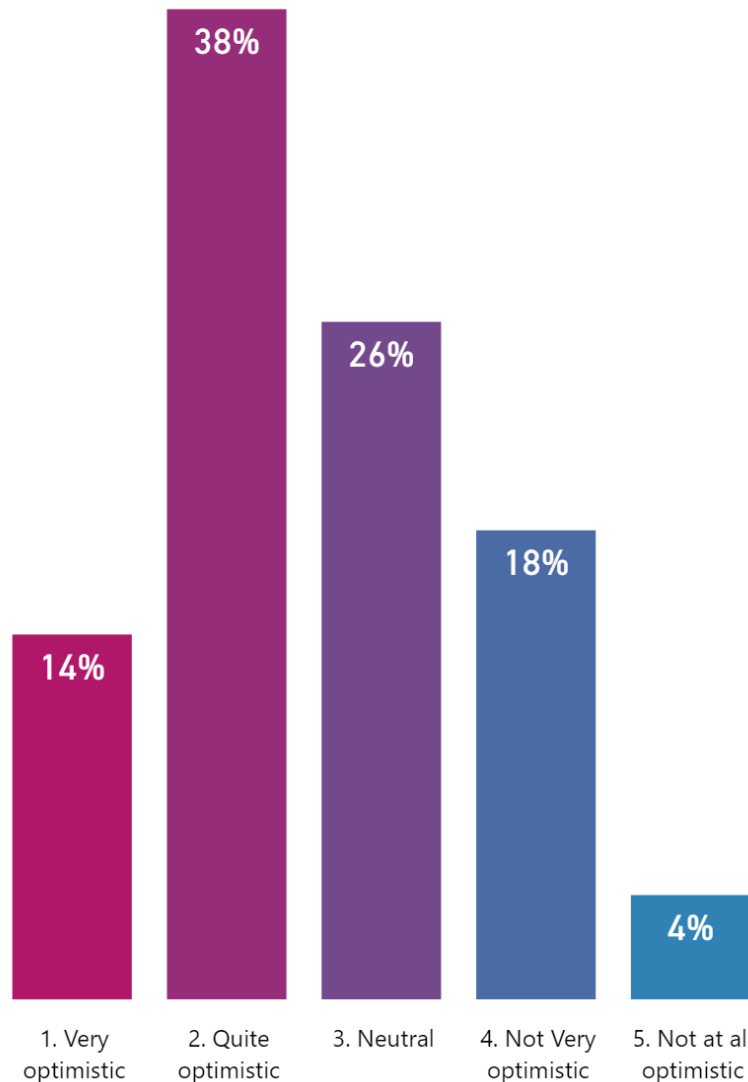
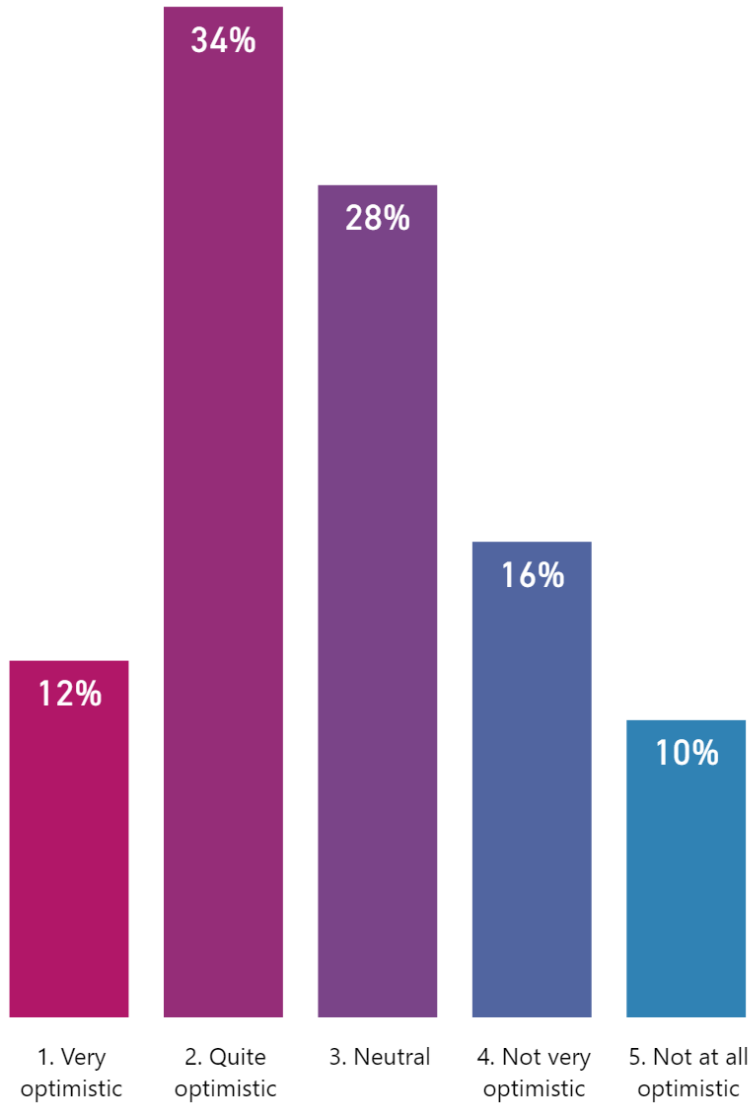
for: 2019 Q2



Optimism for the next 3 months

Optimism for the next 12 months

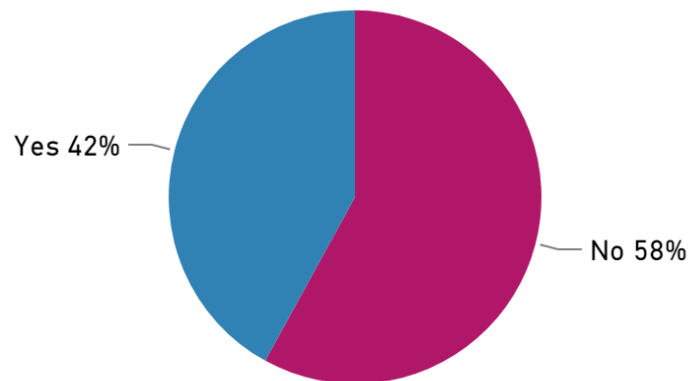
Optimism for the next 24 months



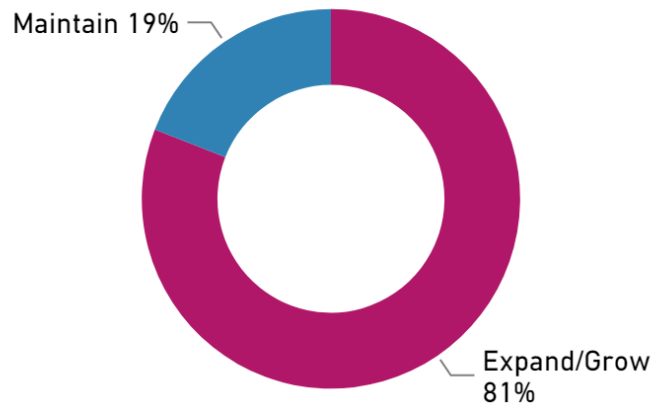
Investment & Barriers for: Forth Valley

for: 2019 Q2

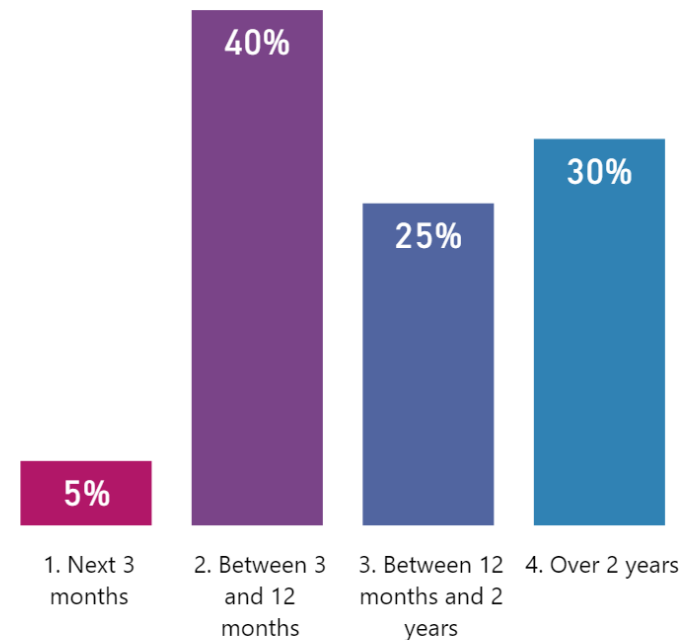
Do businesses have plans to invest?



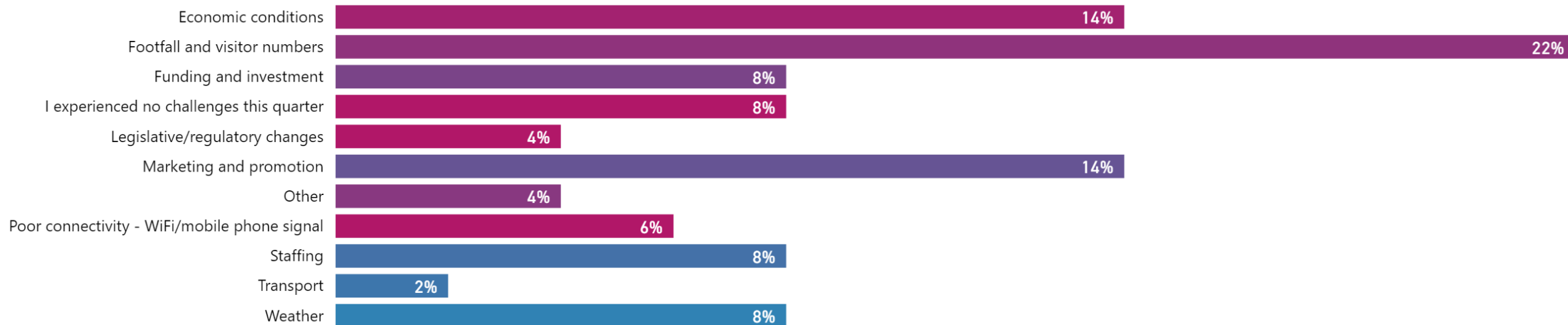
Is planned investment to maintain standards or to expand?

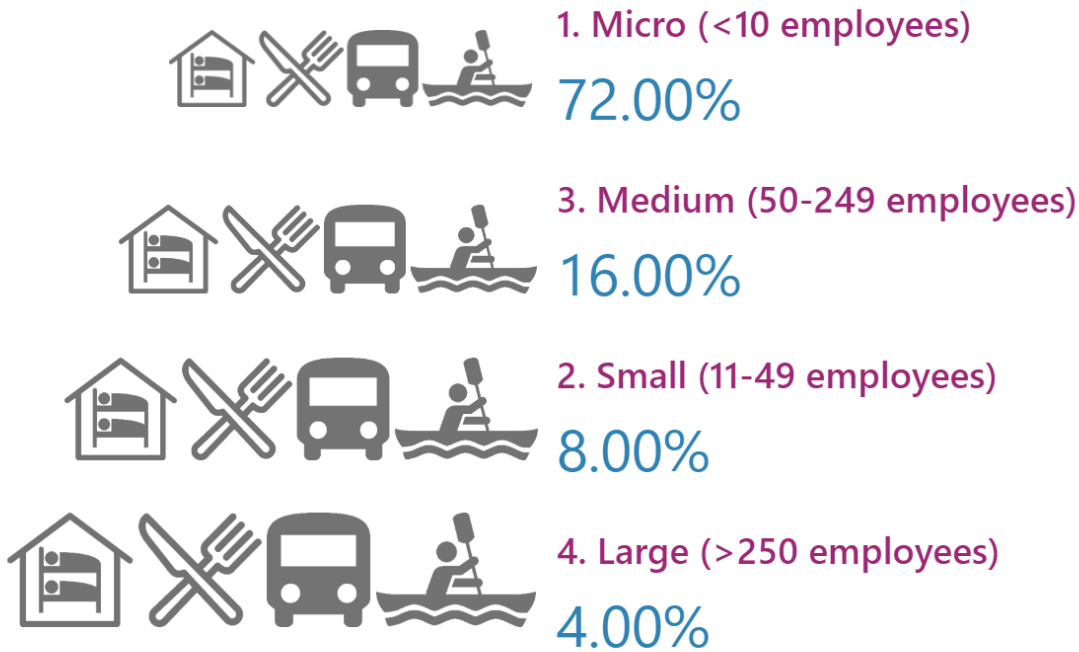


Period of planned investment

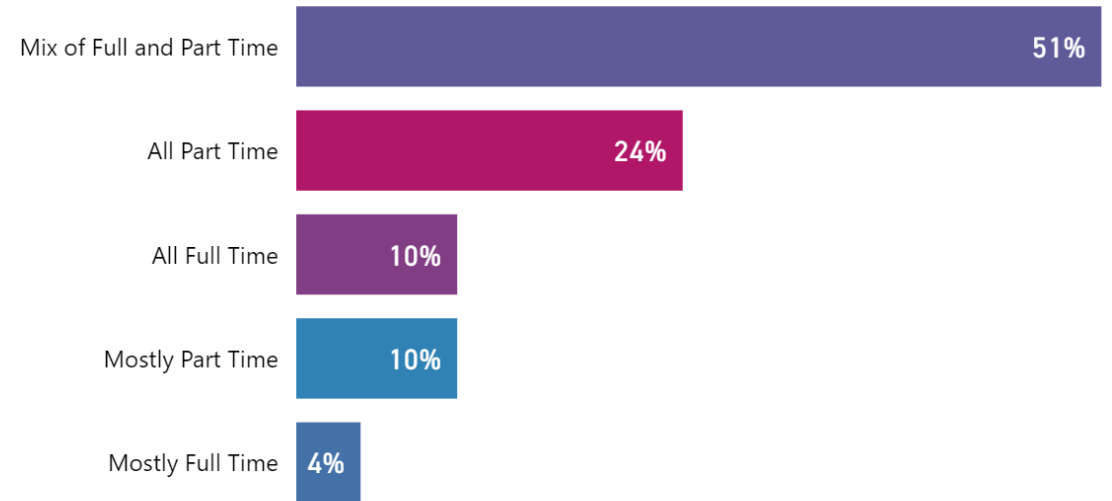


Main Barriers to Success

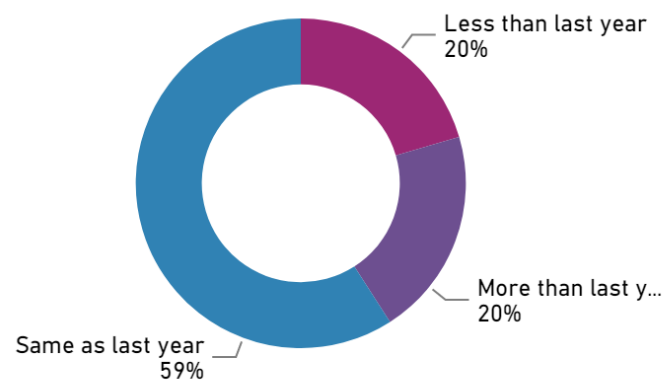




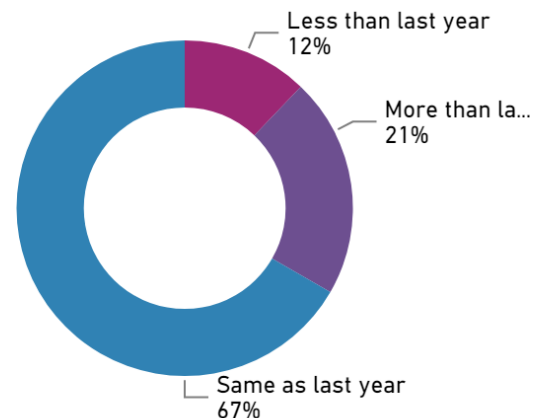
What is the composition of your staff?



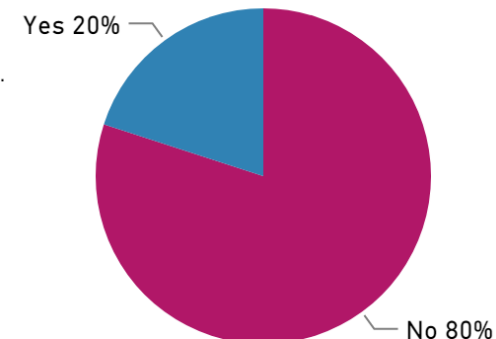
Level of part-time compared to same quarter last year



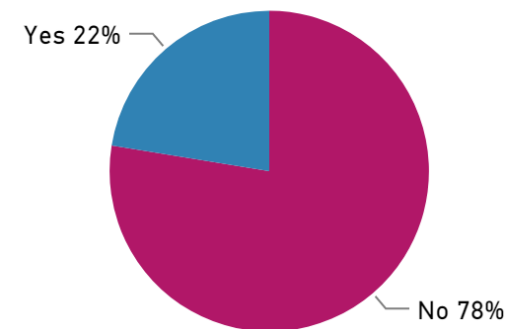
Level of full-time compared to same quarter last year



Do you have any voluntary staff?



Did your business employ seasonal staff?



Online channel use for:

Forth Valley

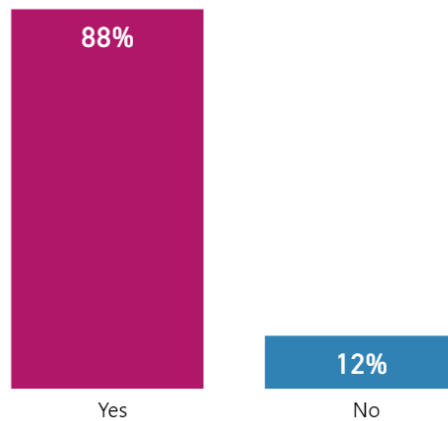


for: 2019 Q2

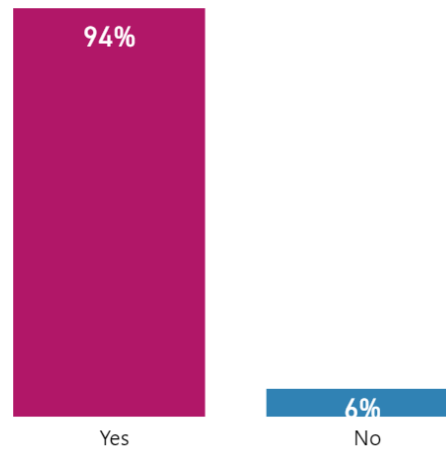


Do you have a presence on any of the following online channels?

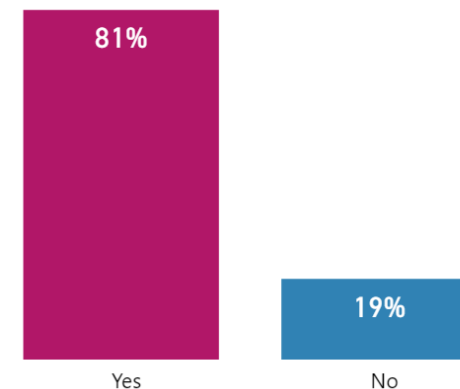
Businesses own website (with booking functionality)



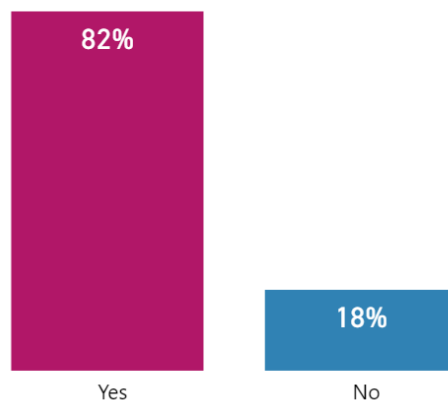
Social media



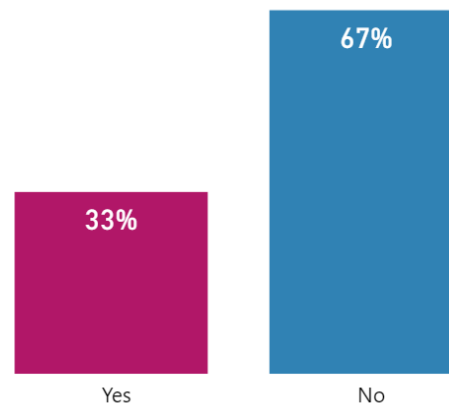
VisitScotland web listing



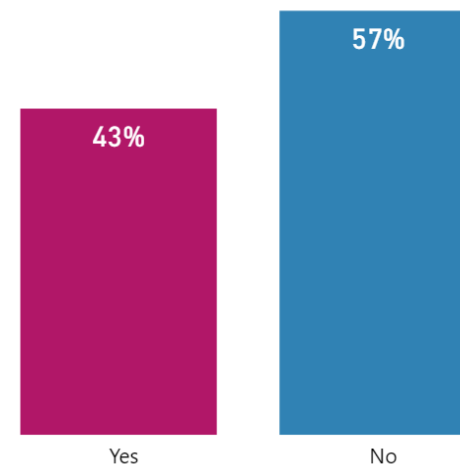
TripAdvisor



Peer-to-peer booking sites



Online travel agent

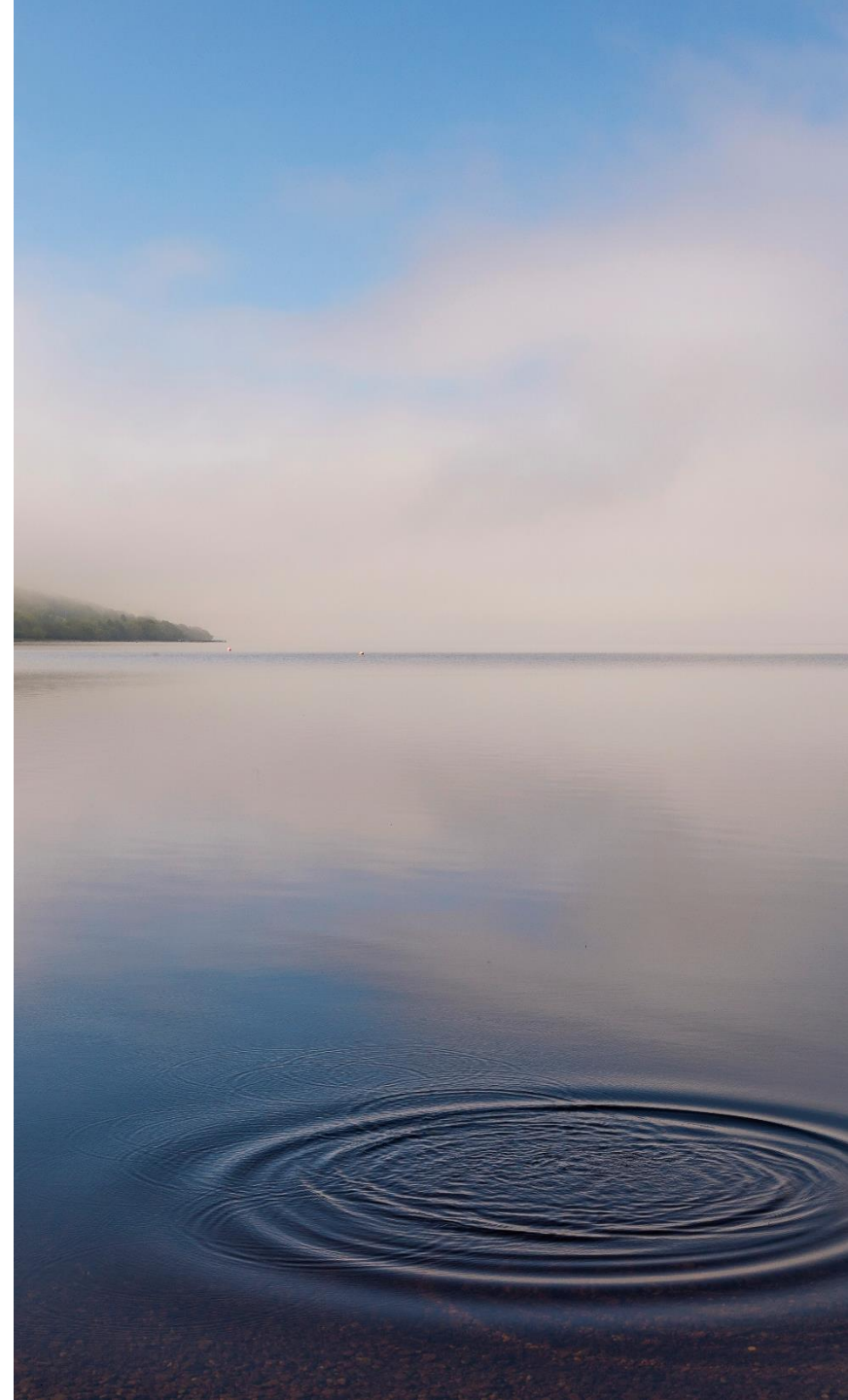


Have you seen any change in the number of enquiries referencing accessibility needs?

Comparison	Response
More	8%
Similar/Same	69%
Less	8%
Don't know	14%

Have you seen any change in the number of bookings from guests with accessibility needs?

Comparison	Response
More	7%
Similar/Same	70%
Less	4%
Don't know	20%



Important information

Information here is provided on a voluntary basis from businesses in each local authority. We'd like to thank all those that take the time to complete the survey and provide vital information to help all those interested to understand the business conditions in their local area.

If your region or sub-regions does not appear in the drop down menus then unfortunately it did not receive enough responses to get its own report. A threshold is set in order to protect the anonymity of the businesses who kindly take the time to fill out the survey. Your responses will still contribute to sector performance at a North, South, East and West of Scotland level. Please contact Lesley.Whitehill@visitscotland.com if you don't see your region here and would like some information on it. We will endeavour to provide you with as much as possible whilst still protecting the anonymity of businesses in each local area.

This survey collates views from businesses on a wide range of topics affecting tourism in local destinations. This data supplements data on tourism in Scotland which is gathered by the annual statistical surveys undertaken at a national level.

Local Authorities included in North, South, East and West of Scotland;

North of Scotland—Highland, Western Isles, Orkney, Shetland, Aberdeen City, Aberdeenshire and Moray local authority areas

West of Scotland—Argyll & Bute, Clackmannanshire, West Dunbartonshire, Falkirk, Stirling, City of Glasgow, East Dunbartonshire, East Renfrewshire, Inverclyde, North Lanarkshire, Renfrewshire, South Lanarkshire, East Ayrshire, North Ayrshire and South Ayrshire local authority areas

East of Scotland—Perth & Kinross, Angus, City of Dundee, Fife, City of Edinburgh, East Lothian, Midlothian and West Lothian local authority areas

South of Scotland—Dumfries & Galloway and Scottish Borders local authority areas



THANK YOU

A huge thank you to our partners who supported, and businesses who completed the Q2 2019 Local Tourism Industry Barometer.

In depth results can be viewed at a regional, sub-regional and sectoral level at visitscotland.org.

The survey for Q3 will be circulated in early October

Disclaimer: VisitScotland has published this report in good faith to update stakeholders on its activity. VisitScotland has taken all reasonable steps to confirm the information contained in the publication is correct. However, VisitScotland does not warrant or assume any legal liability for the accuracy of any information disclosed and accepts no responsibility for any error or omissions. Images © VisitScotland

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August 2019

