

LOCAL TOURISM INDUSTRY BAROMETER

Q4 (October – December) 2019

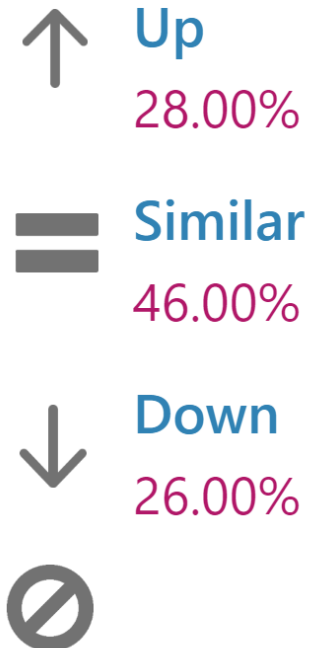


Forth Valley

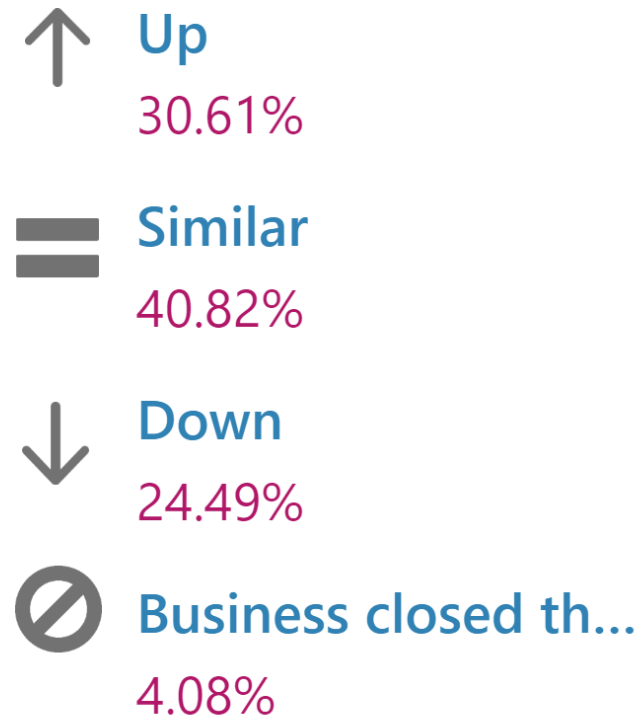
Report Sample Size: 51



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?

- 1. **Very optimistic**
16.00%
- 2. **Quite optimistic**
44.00%
- 3. **Neutral**
24.00%
- 4. **Not Very optimistic**
8.00%
- 5. **Not at all optimistic**
8.00%

Financial Performance for:

Forth Valley

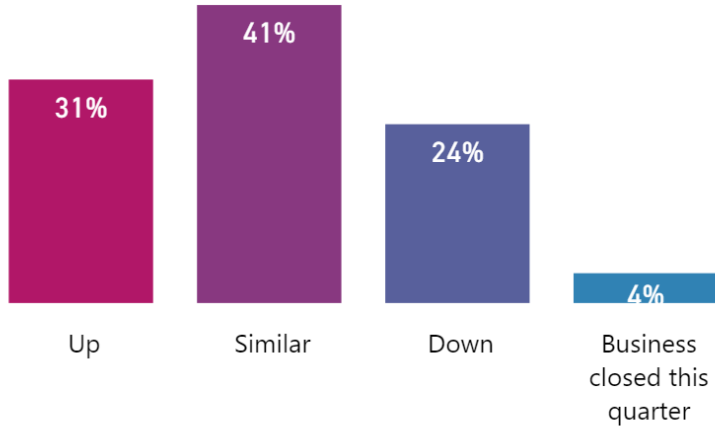


for:

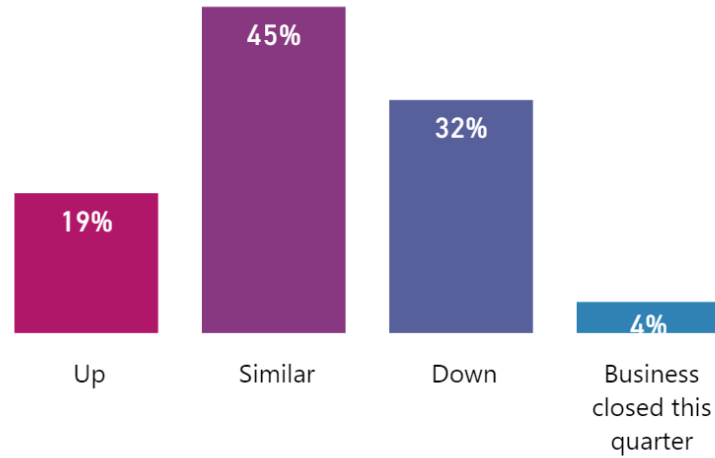
2019 Q4



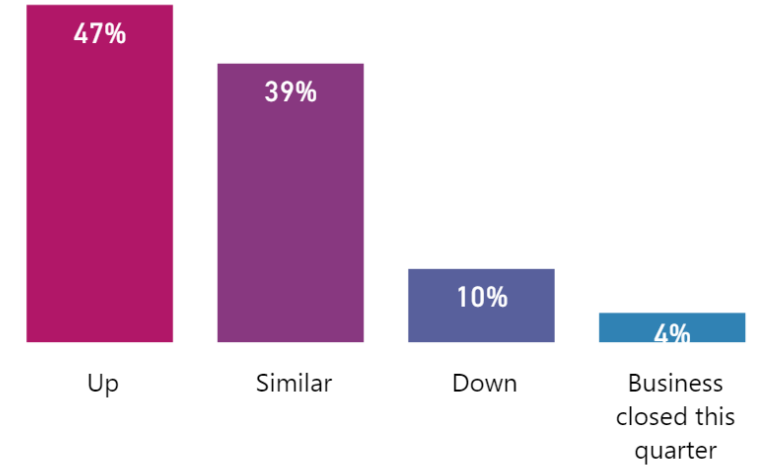
Turnover compared to same quarter last year



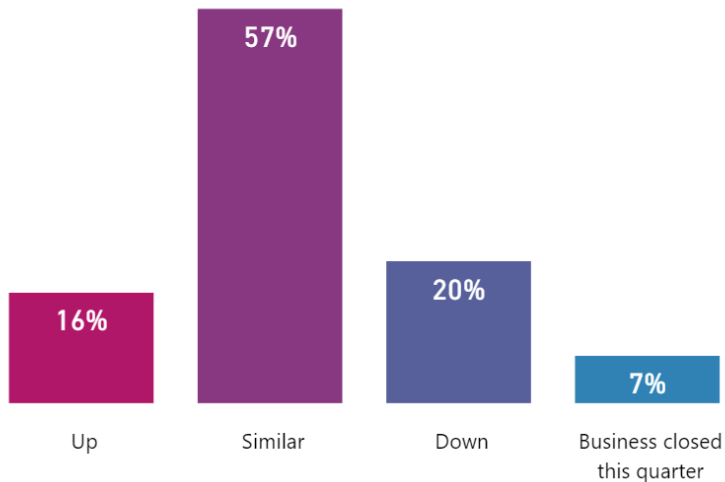
Profit compared to same quarter last year



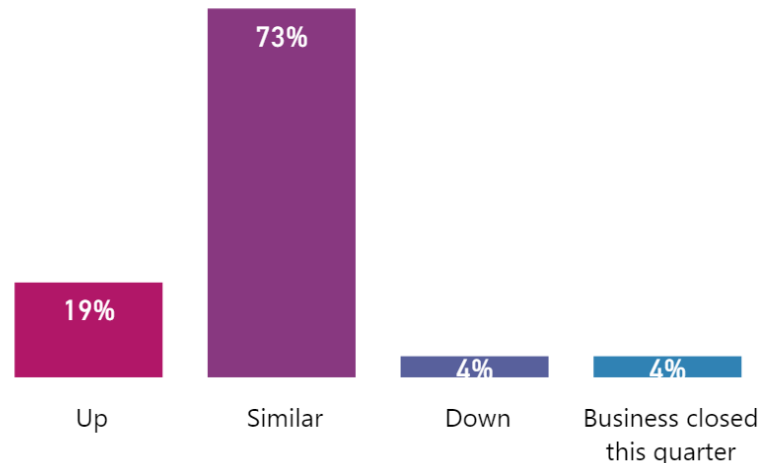
Staff costs compared to same quarter last year



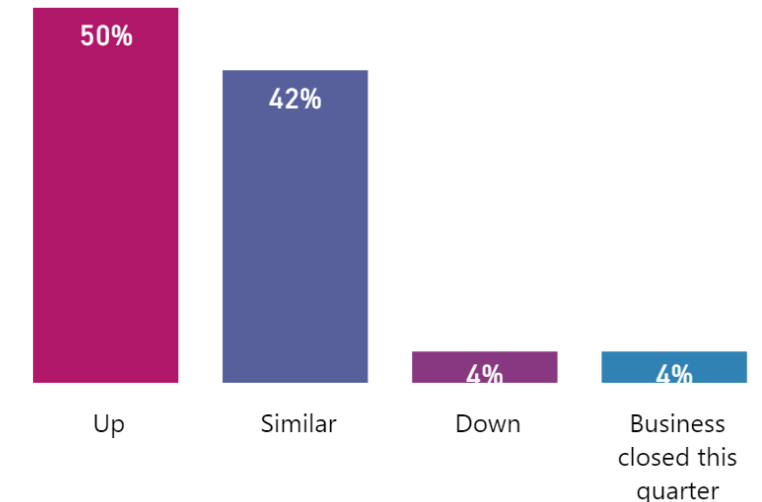
Change in discretionary income?



Prices charged compared to same quarter last year



Input costs compared to same quarter last year



Visitor Performance for:

Forth Valley

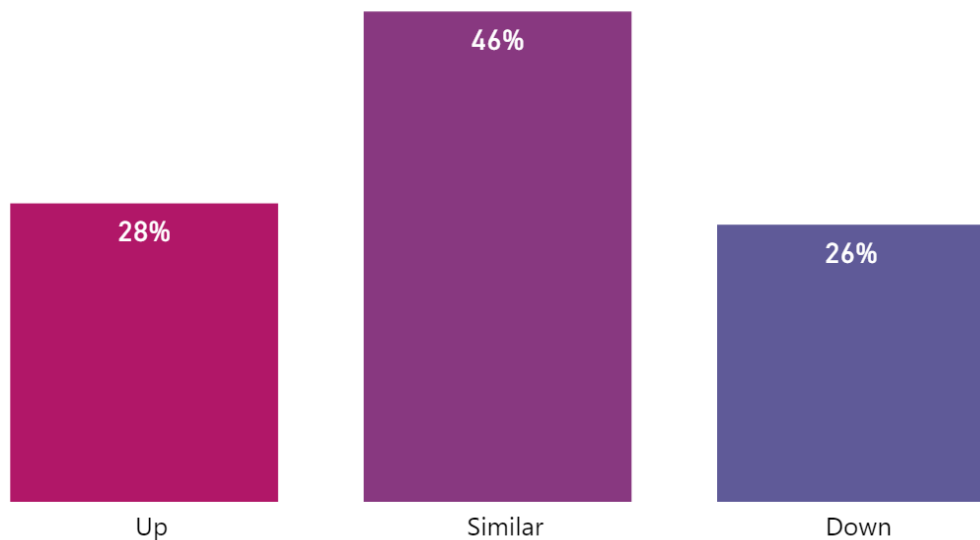


for: 2019 Q4

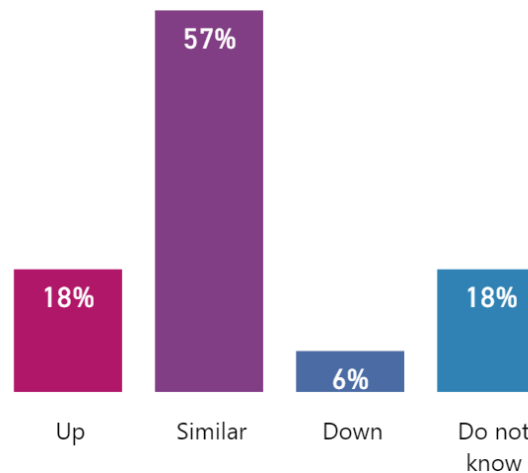


Have you seen a change in visitors from:

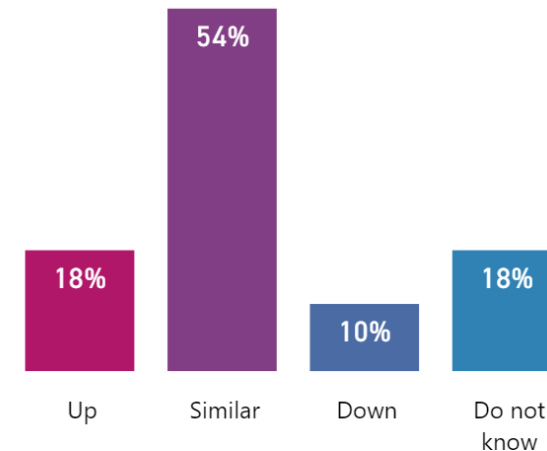
Visitor numbers compared to same quarter last year



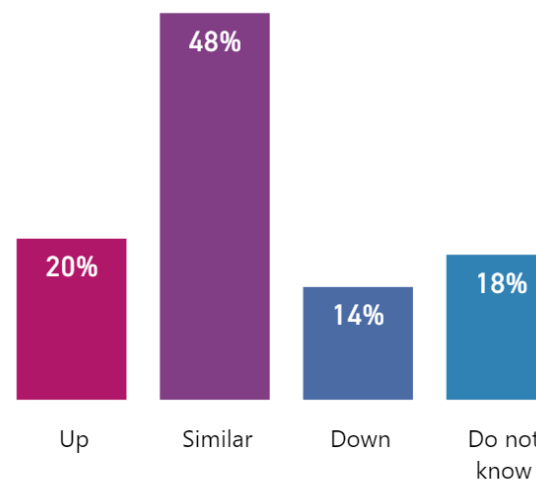
Your local area



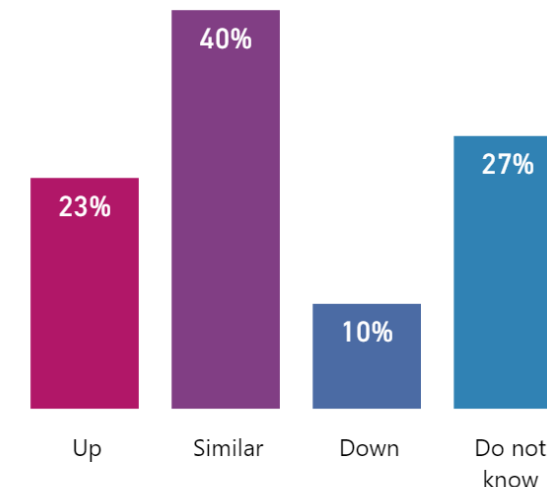
Elsewhere in Scotland



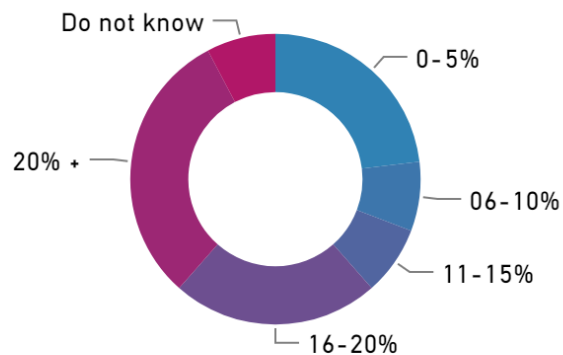
Rest of UK (England/Wales/NI)



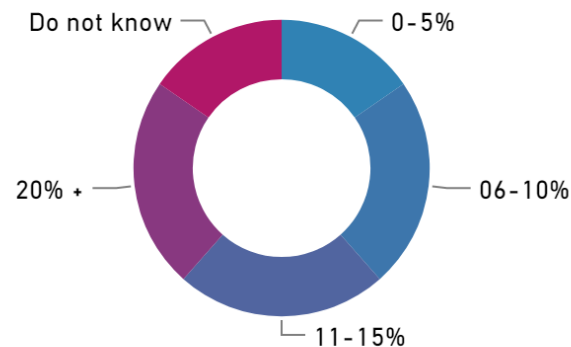
Overseas



Percentage increase in your visitor numbers



Percentage decrease in your visitor numbers



Optimism for: Forth Valley



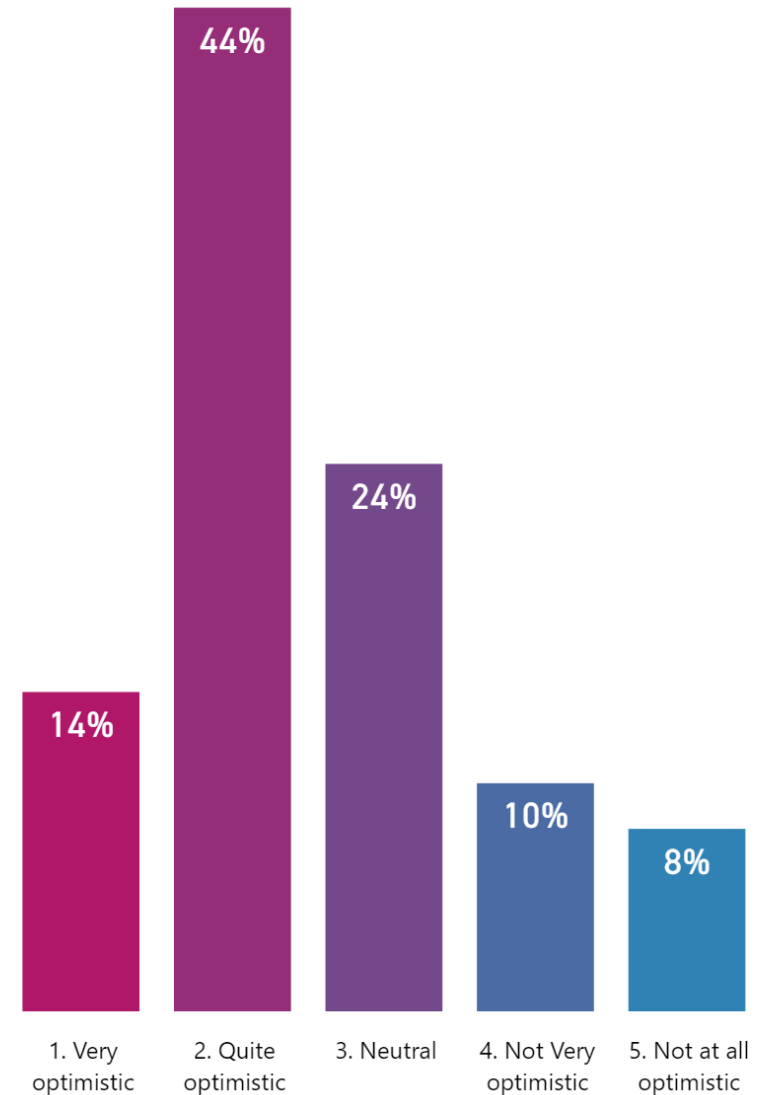
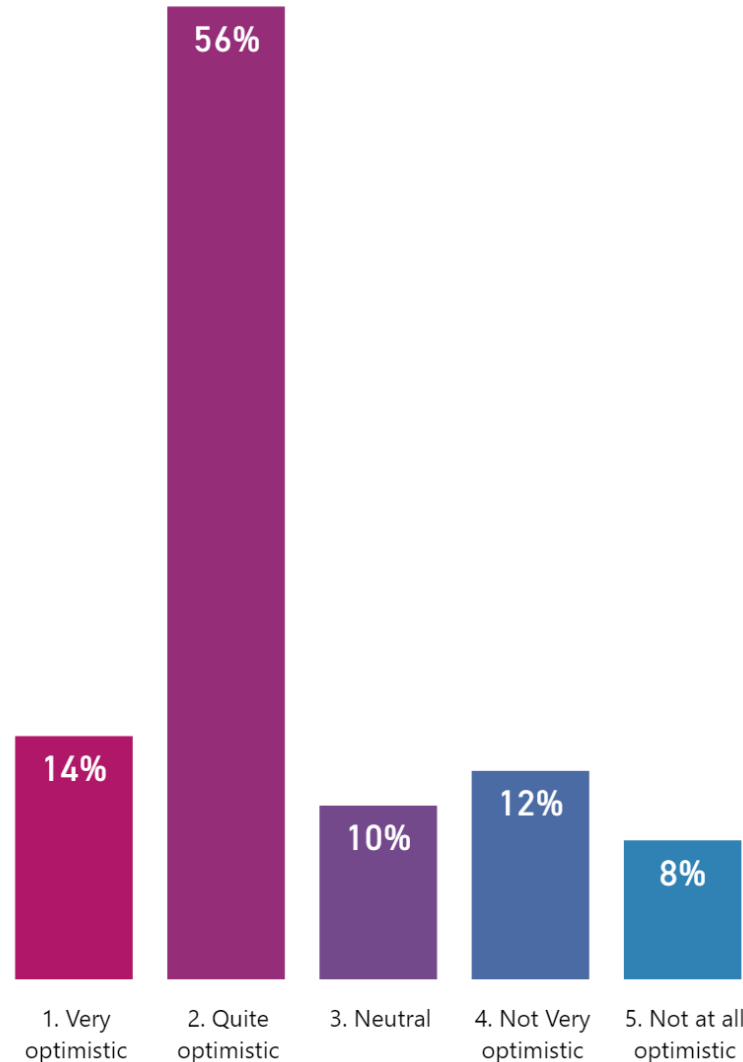
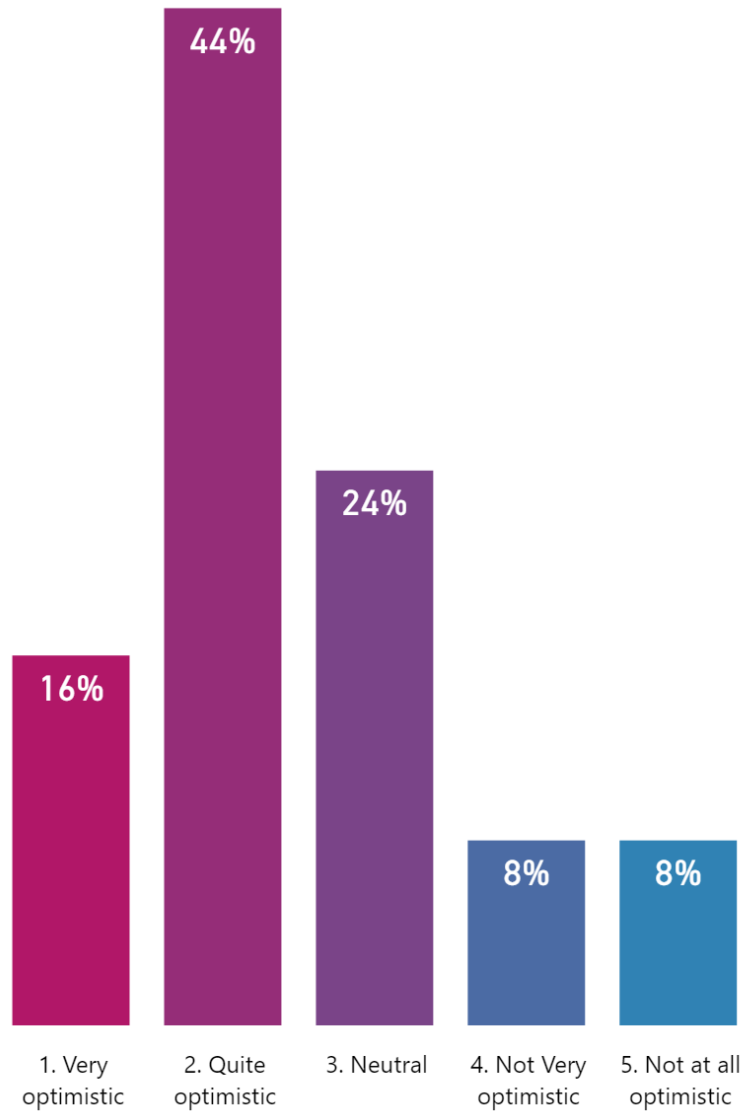
for: 2019 Q4



Optimism for the next 3 months

Optimism for the next 12 months

Optimism for the next 24 months



Investment & Barriers for:

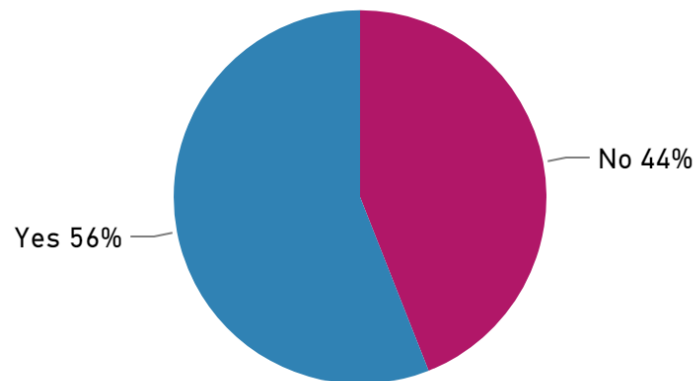
Forth Valley



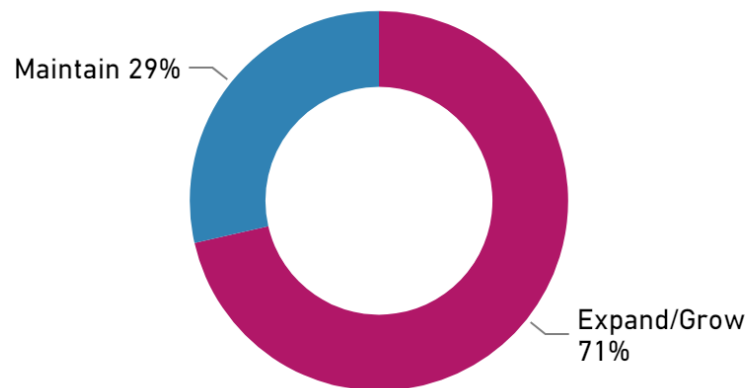
for: 2019 Q4



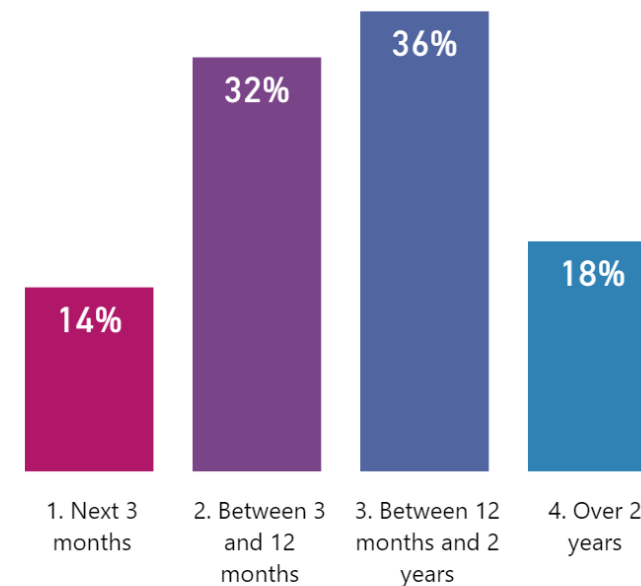
Do businesses have plans to invest?



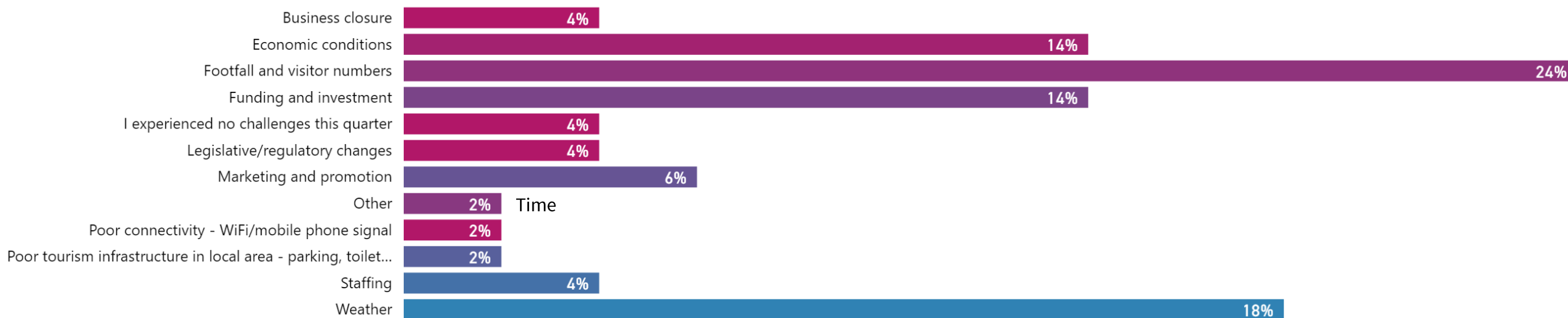
Is planned investment to maintain standards or to expand?



Period of planned investment



Main Barriers to Success





1. Micro (<10 employees)

60.78%



2. Small (11-49 employees)

25.49%



3. Medium (50-249 employees)

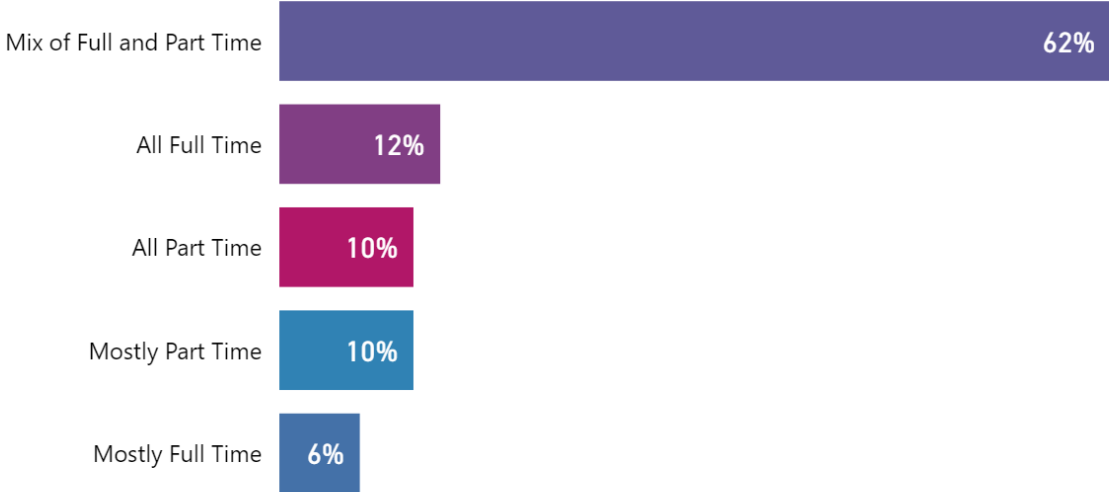
9.80%



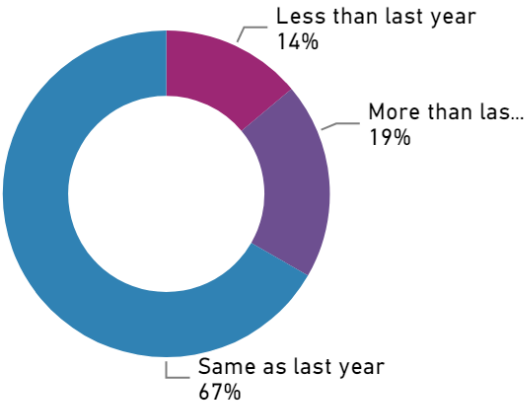
4. Large (>250 employees)

3.92%

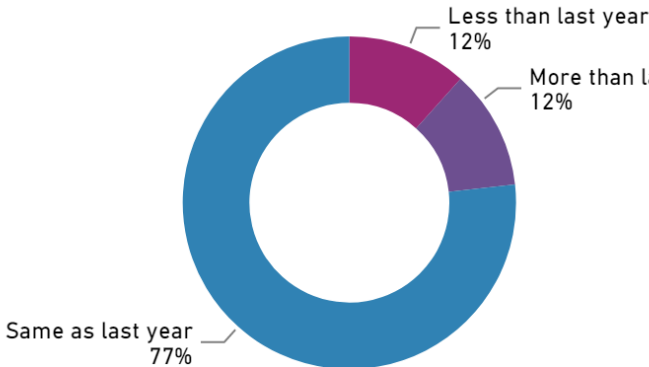
What is the composition of your staff?



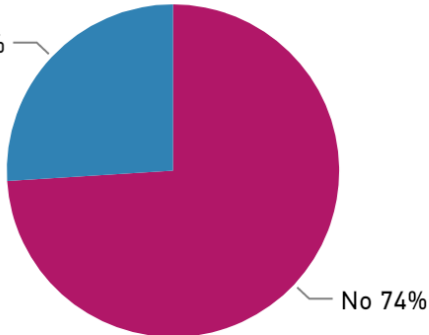
Level of part-time compared to same quarter last year



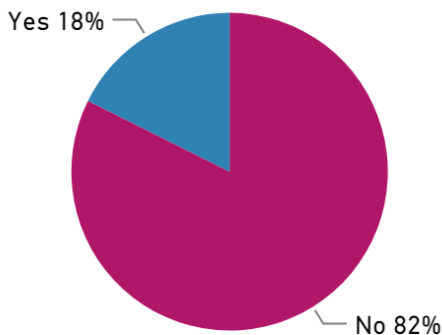
Level of full-time compared to same quarter last year



Do you have any voluntary staff?



Did your business employ seasonal staff?



Online channel use for:

Forth Valley

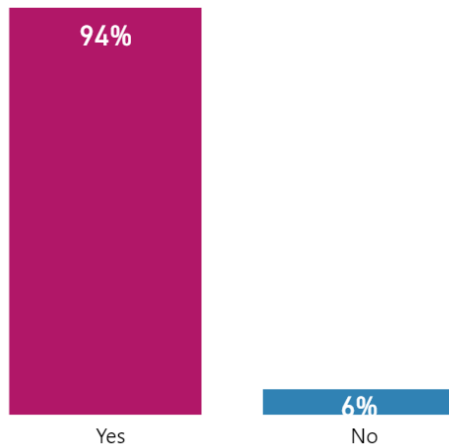


for: 2019 Q4

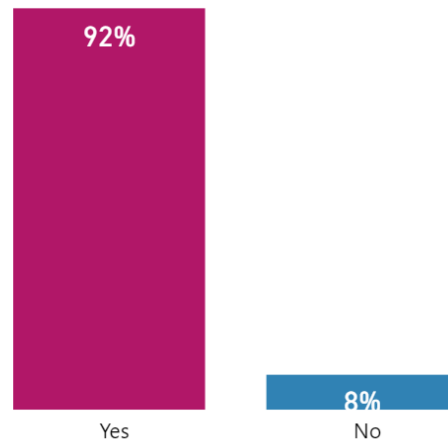


Do you have a presence on any of the following online channels?

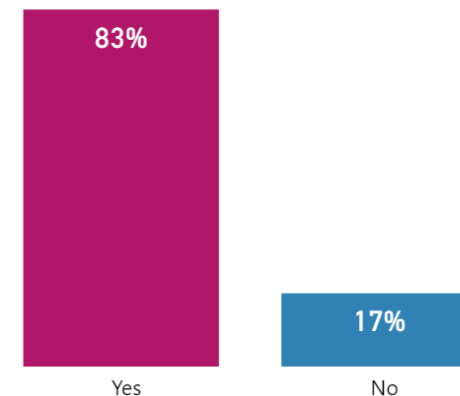
Businesses own website (with booking functionality)



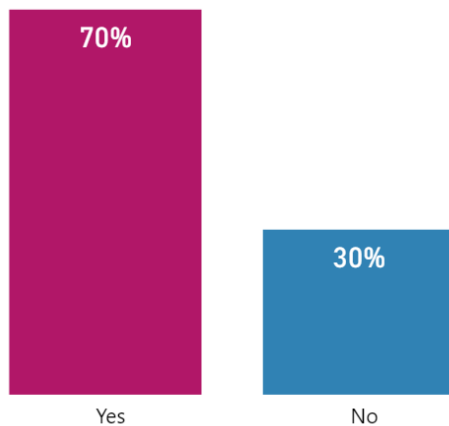
Social media



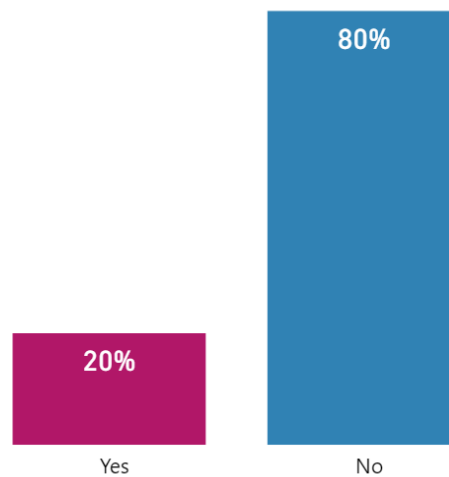
VisitScotland web listing



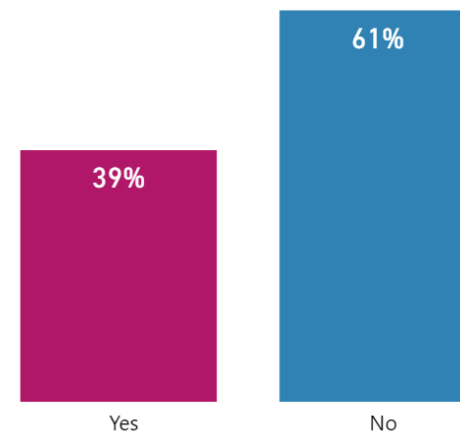
TripAdvisor



Peer-to-peer booking sites



Online travel agent



Brexit Readiness for:

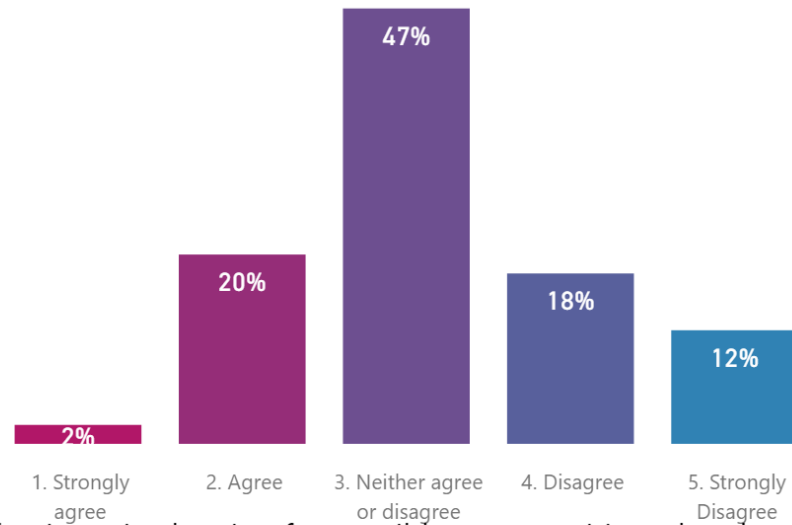
Forth Valley



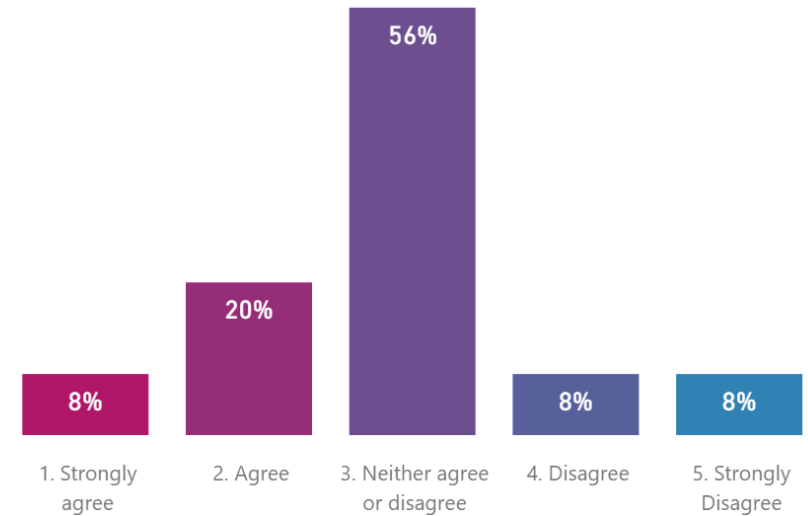
for: 2019 Q4



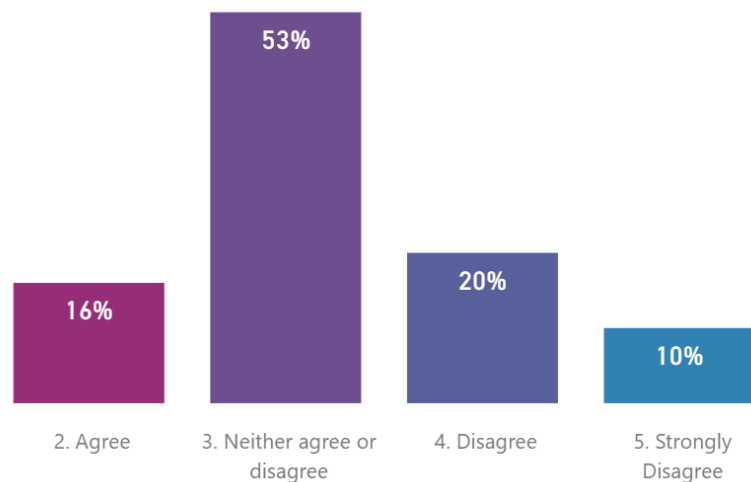
My business is planning for possible challenges related to Brexit



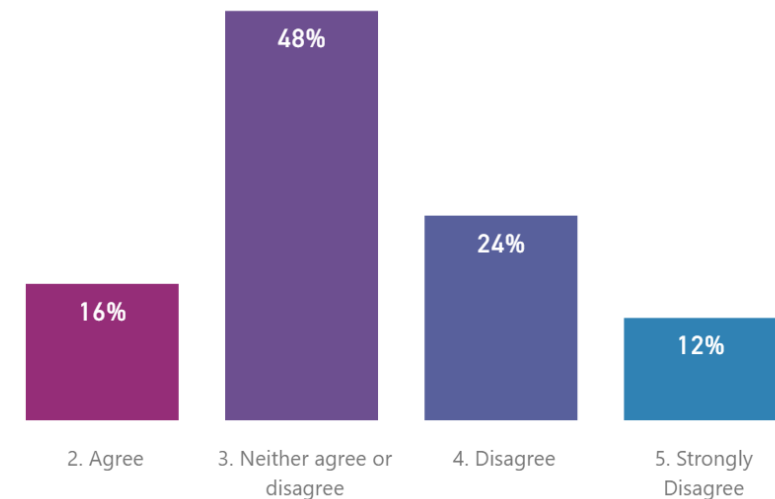
My business is prepared for Brexit



My business is planning for possible opportunities related to Brexit



My business is undertaking activity to prepare for Brexit



Comments Summary

If you wish, please explain why you feel positive/negative regarding the upcoming business periods.

7 respondents shared they felt positive due to one or more of the following reasons:

- increase in visitor numbers/bookings
- having a new business with good prospects
- successful Facebook campaign and website revamp
- business growth
- increased customer awareness

7 respondents shared they did not feel optimistic due to one or more of the following reasons:

- decrease in European visitors
- business rates
- coronavirus
- perceived poor public sector support
- Brexit fears
- low sales/drop in footfall

Comments Summary

If you have any other comments regarding trends, challenges, or opportunities that you would like to share, please use this space.

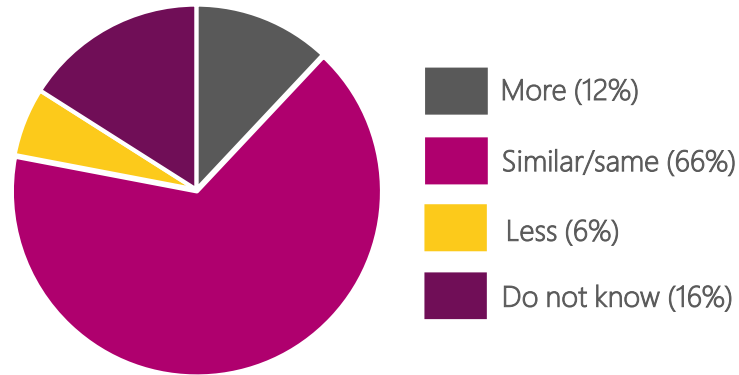
Challenges (reported by 6 respondents):

- poor connectivity to Edinburgh via buses
- business rates
- business online presence
- climate change
- lack of Internet access
- planning

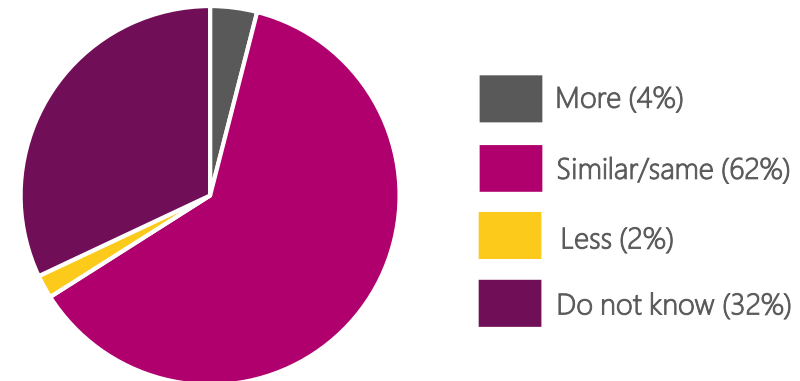
Opportunities (reported by 4 respondents):

- increased public investment in town centre areas
- more initiatives and events in the evenings to make more people stay overnight
- establish a fleet of green buses that pass through the region into the Highlands
- promote Stirling as a destination more

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



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



If you have any other comments in relation to accessibility, please use this space:

- "Trying to find funding for our charity to add a wheelchair accessible vehicle, but proving really difficult."
- "Any business which is given grant/money/investment from the tax payer MUST have at least one property which is accessible."
- "My web site explains the situation of the properties and I don't get any specific enquiries regarding accessibility needs."

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.

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.



THANK YOU

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

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

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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