

# Insight Department

## Forth Valley Tourism Industry Barometer – Q3 2017

The Scottish Tourism Industry Barometer is a collaborative initiative with VisitScotland, Local Authorities, DMO's, and businesses within Scotland, designed to inform and provide stakeholders with an overview of tourism performance at a regional and local level on a quarterly basis.

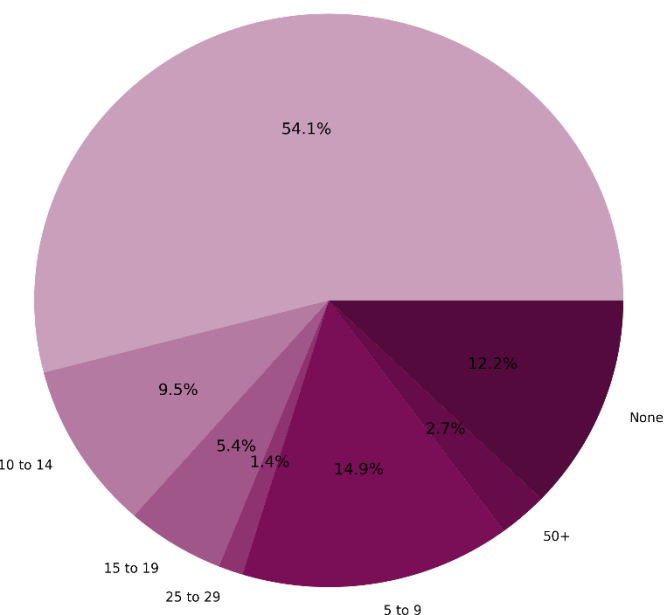
### Where is your business based?

Area	% of Responses
Clackmannanshire	35%
Falkirk	30%
Stirlingshire	35%

### How would you describe the main activity of your business?

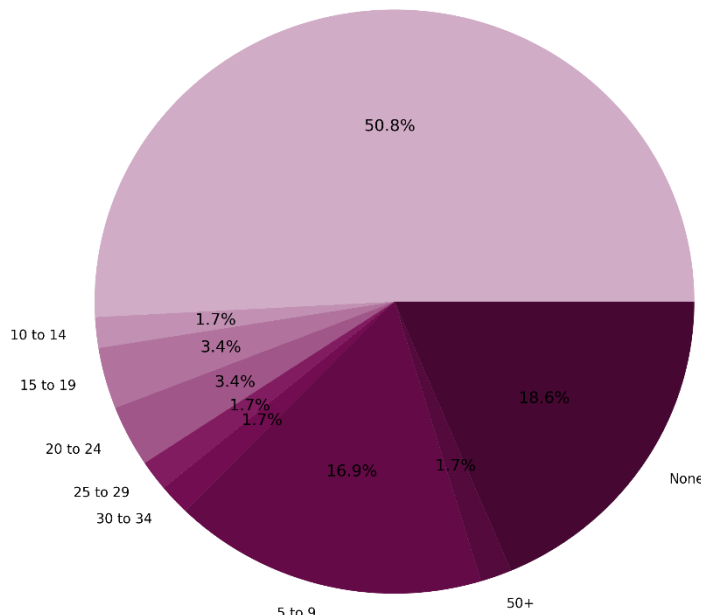
Type of Business	% of Responses
Caravan/Camping	2%
Hotel/B&B/Guesthouse	12%
Other	27%
Outdoor Activity Operator	5%
Restaurant/Cafe/Pub	12%
Retail Operator	17%
Self-catering	6%
Tour Operator	4%
Transport & Tours	2%
Visitor Attraction	13%

1 to 4



Full Time

1 to 4



Part Time

Please select the number of full-time and part-time employees (including yourself) you have employed during the last 3 months

How does this compare to the same quarter last year?

Variation	Full Time Staff (%)	Part Time Staff (%)
More than last year	19%	29%
Same as last year	74%	59%
Less than last year	7%	13%

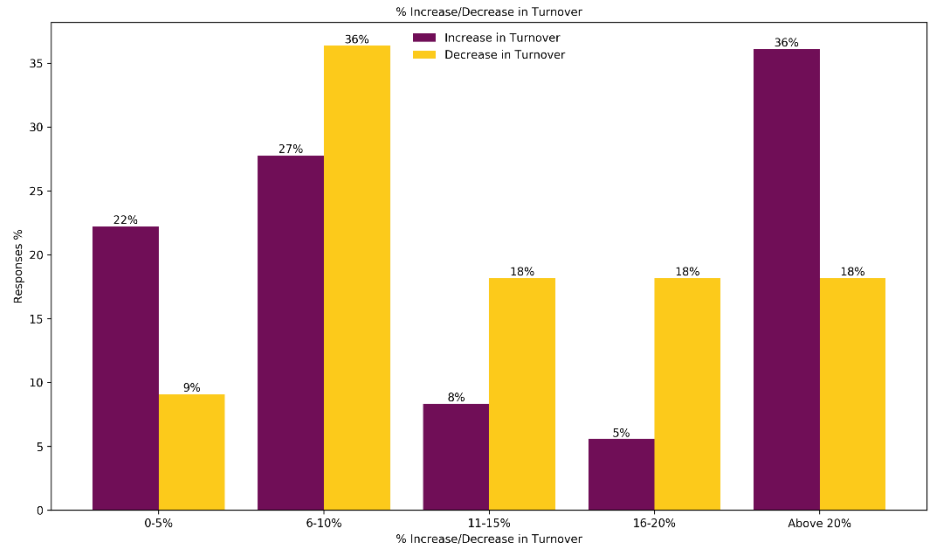
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How did your turnover compare in this quarter compared to the same quarter last year?

Turnover Comparison	% of Responses
Up	47%
Similar	40%
Down	14%
Business closed	0%

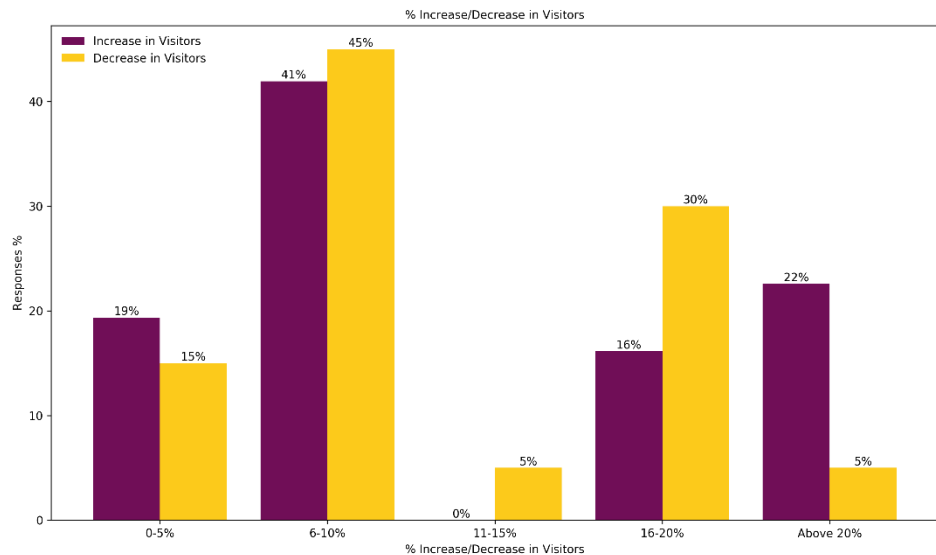
What was the percentage increase/decrease in your turnover?



How were your customer/visitor/guest numbers in this quarter compared to the same quarter last year?

Visitor Numbers	% of Responses
Up	41%
Similar	35%
Down	25%
Business closed	0%

What was the percentage increase/ decrease in your customer/visitor/guest numbers?



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**Do you have any plans to significantly invest in your business in the near future?**

Business Investment	% of Responses
No	46%
Yes	54%

**If yes, over what period is your investment planned for?**

Period of Investment	% of Responses
Next 12 months	70%
Between 12 and 18 months	16%
Between 18 months and 2 years	5%
Over 2 years	9%
Don't know	0%

**Have you noticed any significant change in the discretionary spend of visitors during this period?**

Discretionary Spend	% of Responses
No	59%
Yes	41%

**If yes, please indicate how much of a percentage change this has been, against the same period last year**

Change in Spend	% of Responses
A large increase - over 15%	15%
A small increase - up to 15%	27%
No change	0%
A small decrease - up to 15%	42%
A large decrease - over 15%	15%

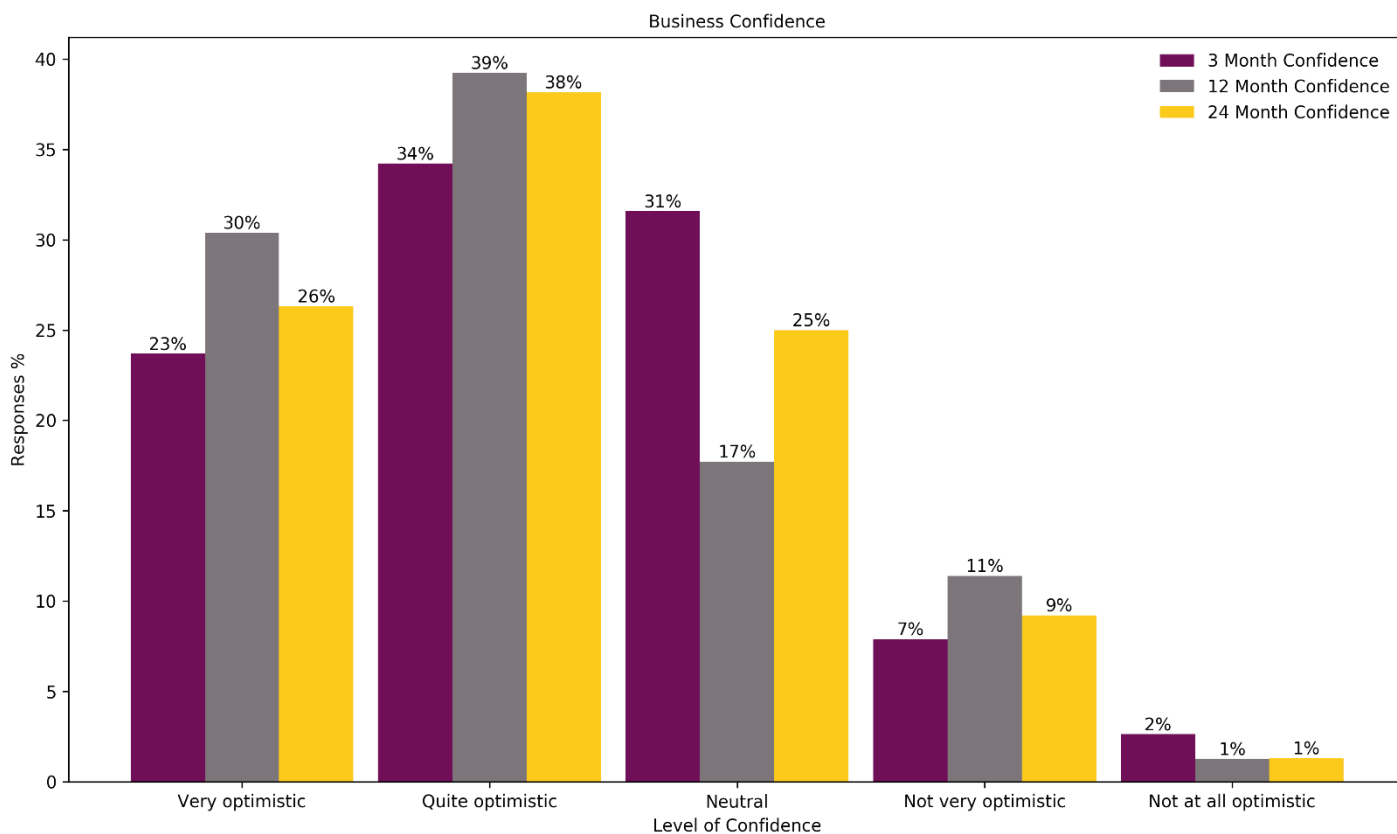
**Has there been any difference in who your customers / visitors have been this Spring season compared to Spring last year?**

Change	Local (%)	Rest of Scotland (%)	Rest of UK (%)	Overseas (%)
More of these	26%	26%	28%	49%
Same/similar numbers	51%	46%	42%	25%
Less of these	15%	13%	11%	10%
Don't know	8%	15%	19%	15%



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Please indicate how confident you feel about the performance of your business over the following periods



The Forth Valley, comprised of data from the Falkirk, Clackmannanshire and Stirlingshire Tourism Industry Barometers, appears to have had a positive Q3.

Almost half of businesses saw an increase in turnover compared to the same quarter last year. Of these businesses, 36% experienced a growth of over 20%.

Despite businesses noting uncertainty around the political and economic situation, confidence seems high for the next 12 months, with 54% of business having plans for significant investment in the near future and 70% of those having it planned for the next 12 months.

The biggest change in visitor demographics is reported to have come from overseas markets, with 49% of businesses noticing more customers from abroad. This shift in visitor origins has been noted throughout the sector due to the weak pound and the relative affordability of Scotland as a destination compared to years gone by.

## Sample: 83

### Disclaimer:

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2017

Version 1.0

### Contact Us

Insight Department  
VisitScotland  
Ocean Point One  
94 Ocean Drive  
Edinburgh  
EH6 6JH  
T: 0131 472 2222  
research@visitscotland.com  
www.visitscotland.org