

# Insight Department

## Falkirk Tourism Industry Barometer – Q4 2017

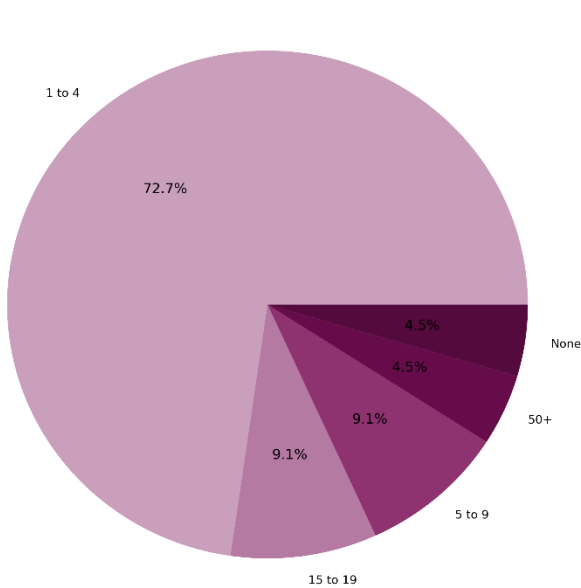
The Scottish Tourism Industry Barometer is a collaborative initiative with VisitScotland, Local Authorities, DMO's, and businesses within Scotland, designed to inform and provide stakeholders with an overview of tourism performance at a regional and local level on a quarterly basis.

### Where is your business based?

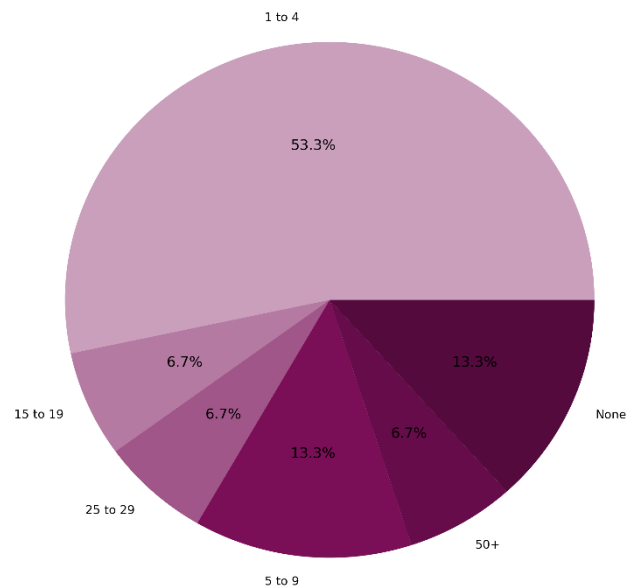
Area	% of Responses
Airth	4%
Bo'ness & Blackness	13%
Denny	4%
Falkirk	46%
Other	33%

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

Type of Business	% of Responses
Caravan/Camping	8%
Hostel	4%
Hotel/B&B/Guesthouse	21%
Other	17%
Outdoor Activity Operator	8%
Restaurant/Cafe/Pub	8%
Retail Operator	8%
Tour Operator	4%
Visitor Attraction	21%



Full Time



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	24%	31%
Same as last year	67%	63%
Less than last year	10%	6%

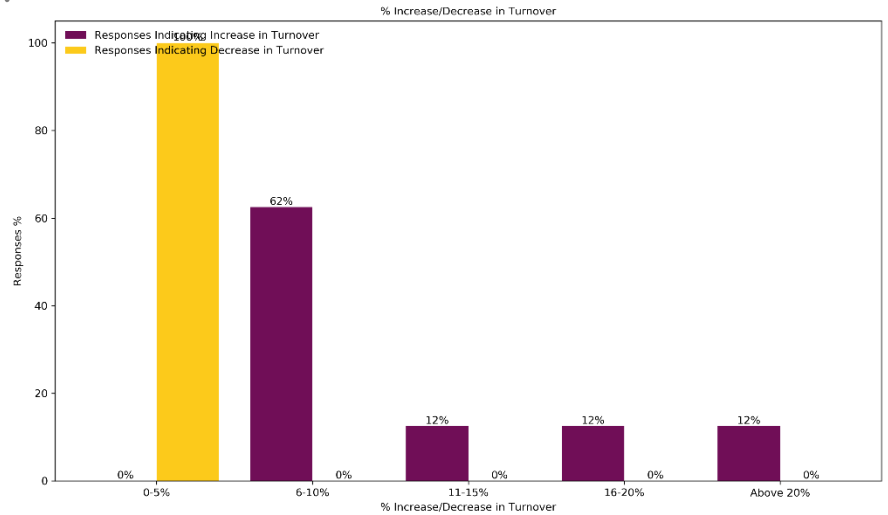
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How did your turnover compare in this quarter compared to the same quarter last year?

Turnover Comparison	% of Responses
Up	35%
Similar	52%
Down	13%
Business closed	0%

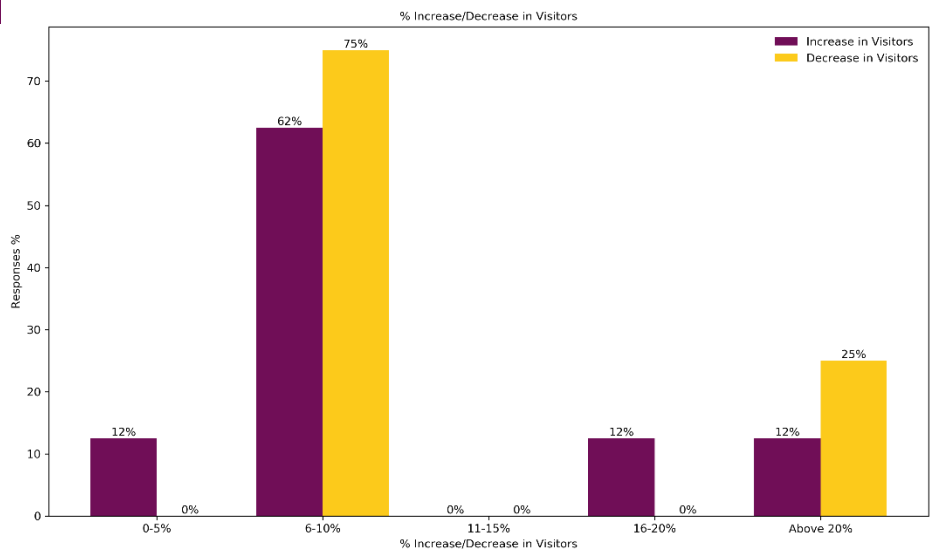
What was the percentage increase/decrease in your turnover?



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

Visitor Numbers	% of Responses
Up	35%
Similar	43%
Down	22%
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	38%
Yes	63%

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

Period of Investment	% of Responses
Next 12 months	47%
Between 12 and 18 months	13%
Between 18 months and 2 years	33%
Over 2 years	0%
Don't know	7%

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

Discretionary Spend	% of Responses
No	67%
Yes	33%

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

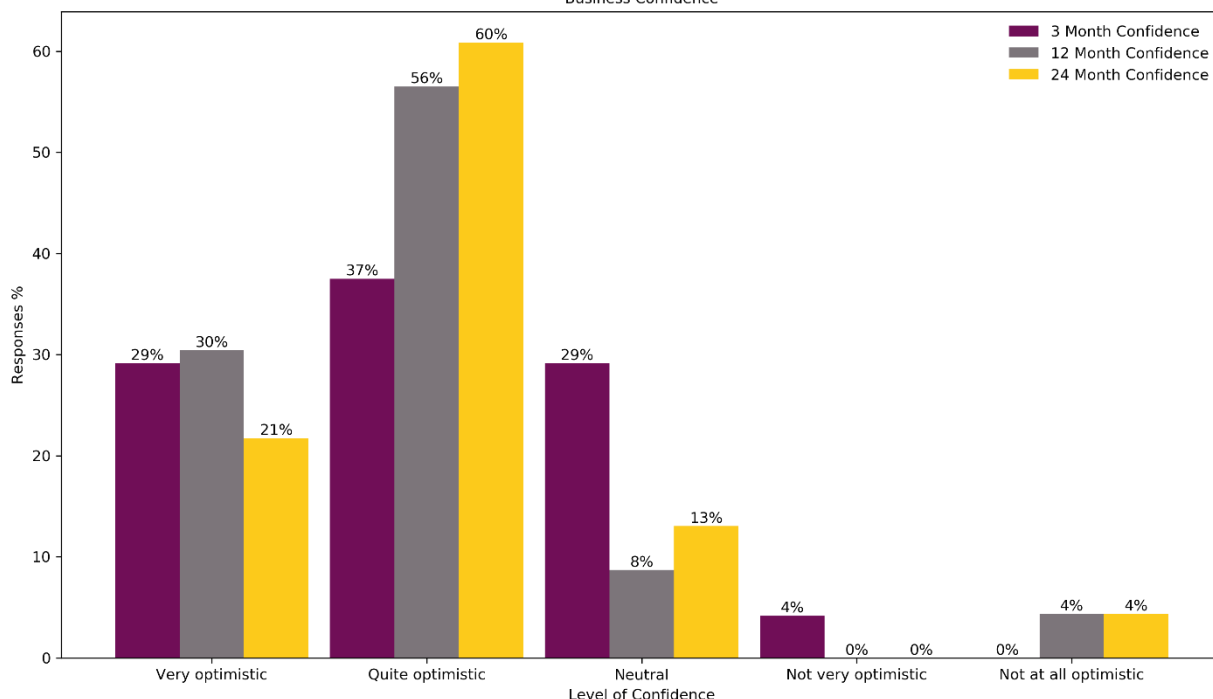
Change in Spend	% of Responses
A large increase - over 15%	0%
A small increase - up to 15%	38%
No change	13%
A small decrease - up to 15%	50%
A large decrease - over 15%	0%

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

Change	Local (%)	Rest of Scotland (%)	Rest of UK (%)	Overseas (%)
More of these	27%	29%	11%	21%
Same/similar numbers	55%	52%	63%	42%
Less of these	9%	10%	5%	16%
Don't know	9%	10%	21%	21%

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

Business Confidence



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The winter season in the Falkirk area has presented challenges to tourism business, but despite these, 67% of businesses remain optimistic over the next three months, increasing to 87% over the coming 12 month period. There is evident positivity around the developments being carried out, and therefore the attractiveness of Falkirk as a visitor destination. An increase in forward bookings and enquiries were also evident from the responses, hence confidence levels are higher when considering the next year as a whole.

In line with this increased confidence, almost two thirds of tourism businesses are looking to invest in their operations, with most of this activity planned for the next 18 months. A lack of financial support, and time, were highlighted as barriers to success, which may have led to some businesses holding off on investment in the nearer future. This hesitance is compounded further by uncertainty related to Brexit.

Over a third of businesses in and around Falkirk have seen an increase in turnover of Q4 of 2016, and of those businesses experiencing a decrease, none reported more than a 5% reduction in turnover. This stable performance has allowed both full and part time staff levels to be, on the whole, maintained or increased. Many businesses commented on increasing overhead costs, and tax implications associated with running a business as barriers to success or future concerns.

This increase in turnover comes despite the fact most businesses have seen no change in the discretionary spend of visitors, and those who did notice a change, indicated this to be within 15% up or down. It is evident businesses in Falkirk feel consumers have less disposable income, and therefore are looking to limit expenditure as part of any trips taken.

Around one third of businesses surveyed saw an increase in the number of visitors, but on the most part there was no marked difference in the number or composition of visitors to the area. The weakness of the pound and favourable exchange rates, encouraging “staycations” from within the UK, and international visitors were offered as reasons for longer term positivity.

Some caution should be used when looking at these results given the small sample size.

**Sample: 24**



#### Disclaimer:

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