

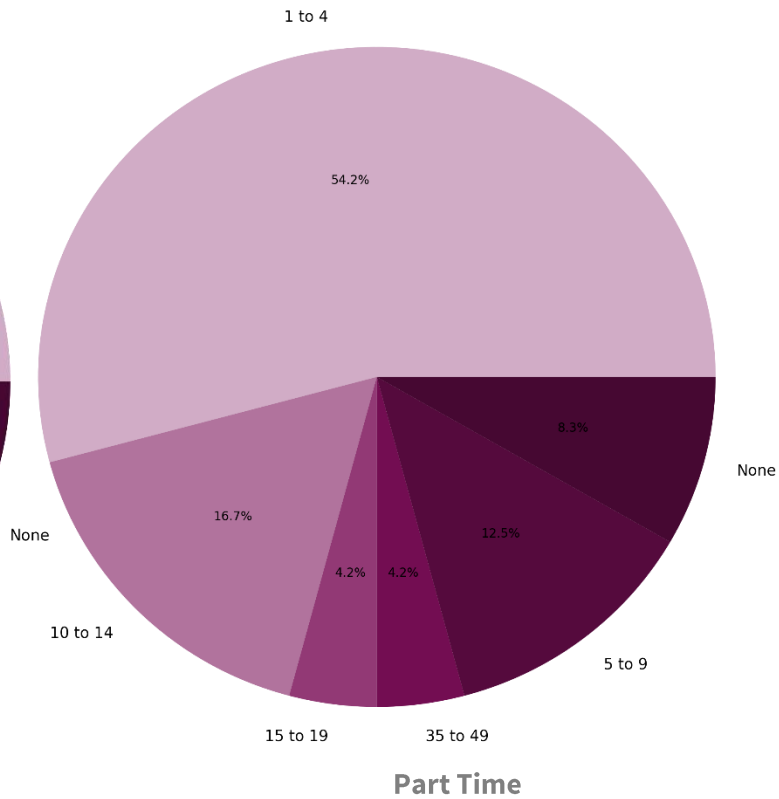
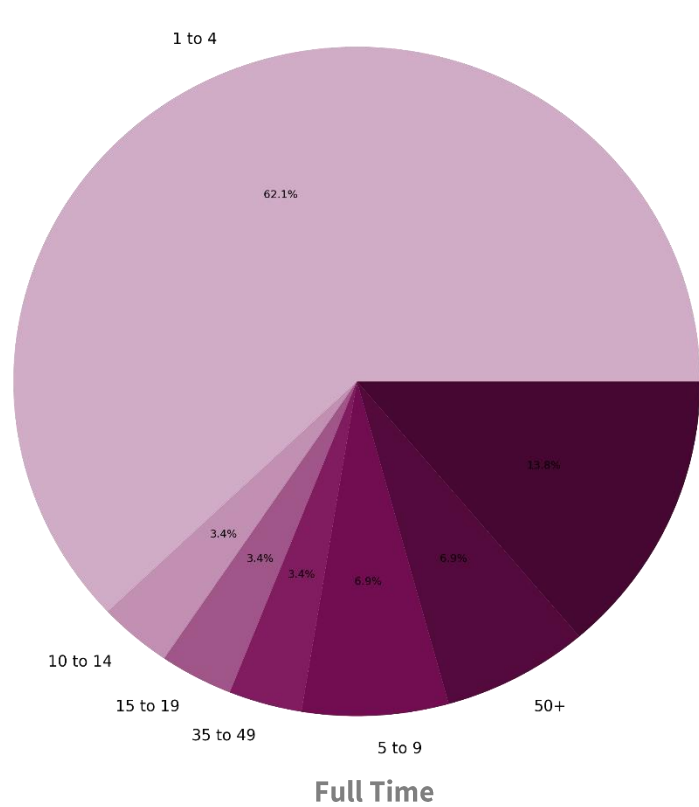
# Insight Department

## Cowal 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.

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

Type of Business	Responses
Hotel/B&B/Guesthouse	9%
Other	9%
Outdoor Activity Operator	3%
Restaurant/Cafe/Pub	12%
Retail Operator	15%
Self-catering	36%
Tour Operator	3%
Visitor Attraction	12%



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%	19%
Same as last year	69%	77%
Less than last year	7%	4%

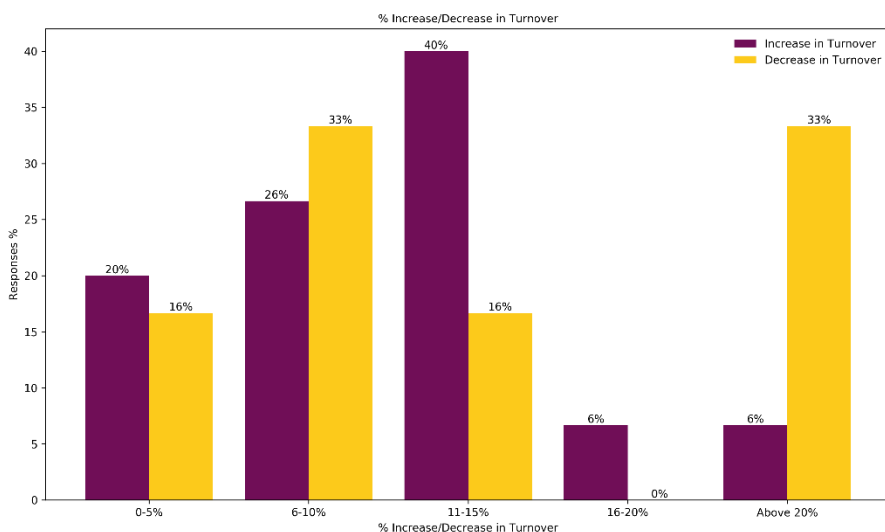
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How did your turnover compare in this quarter compared to the same quarter last year?

Turnover Comparison	% of Responses
Up	45%
Similar	30%
Down	21%
Business closed	3%

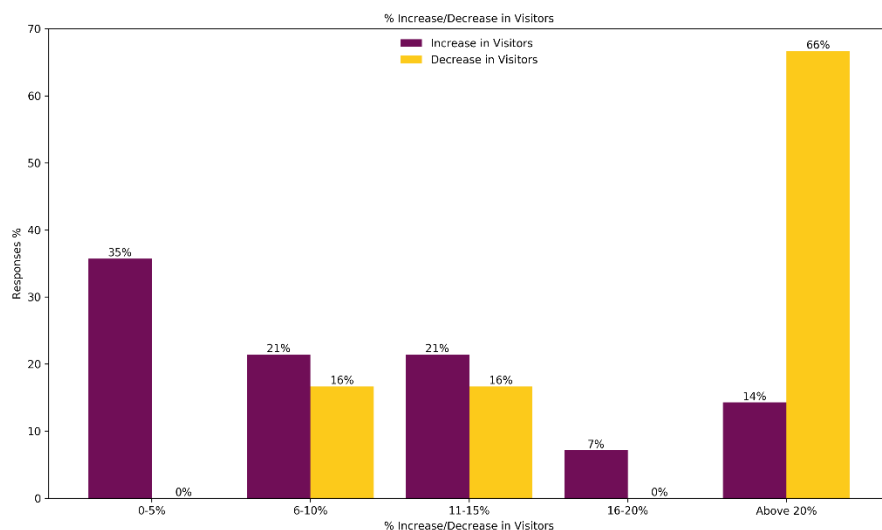
What was the percentage increase/decrease in your turnover?



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

Visitor Numbers	% of Responses
Up	42%
Similar	36%
Down	18%
Business closed	3%

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



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## Cowal Tourism Industry Barometer – Q3 2017

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

Business Investment	% of Responses
No	61%
Yes	39%

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

Period of Investment	% of Responses
Next 12 months	46%
Between 12 and 18 months	15%
Between 18 months and 2 years	23%
Over 2 years	15%
Don't know	0%

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

Discretionary Spend	% of Responses
No	58%
Yes	42%

**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%	43%
No change	7%
A small decrease - up to 15%	7%
A large decrease - over 15%	43%

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

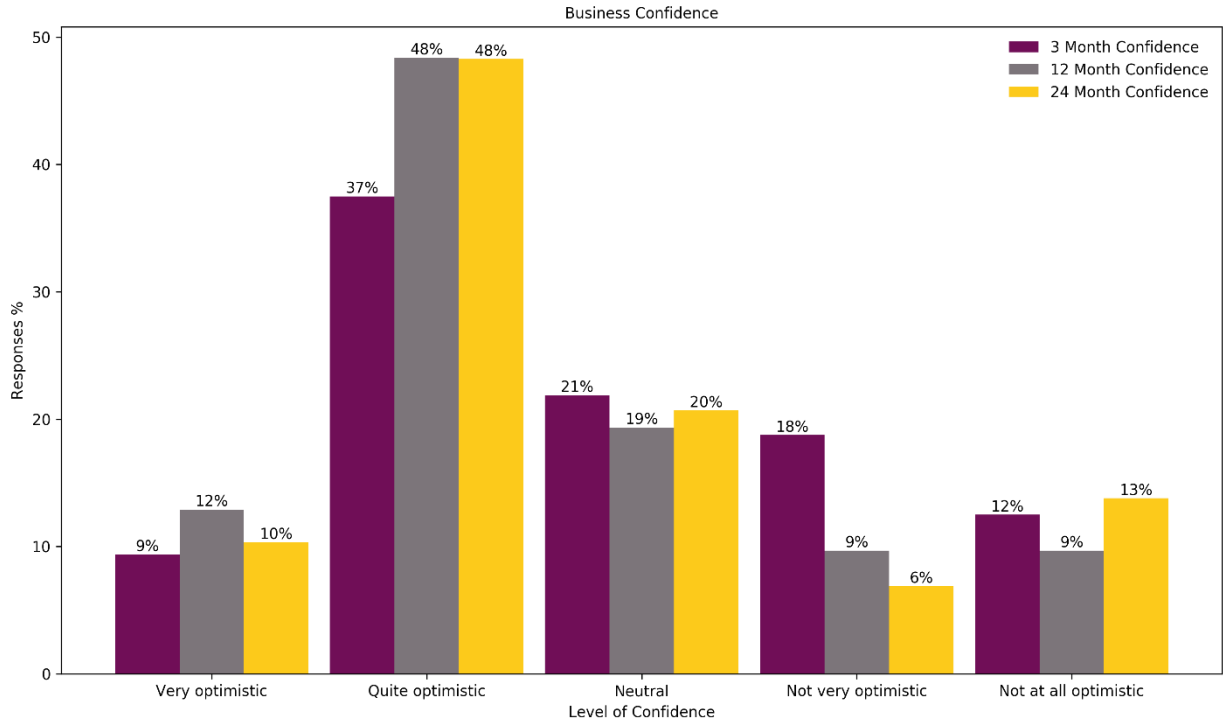
Change	Local (%)	Rest of Scotland (%)	Rest of UK (%)	Overseas (%)
More of these	22%	28%	47%	57%
Same/similar numbers	52%	48%	37%	21%
Less of these	19%	17%	13%	14%
Don't know	7%	7%	3%	7%



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## Cowal Tourism Industry Barometer – Q3 2017

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



Argyll & The Isles overall has had a very positive summer season with 50% of businesses reporting an increase in turnover compared to the same quarter last year. Visitor numbers again appear to have increased in the area with 48% of businesses reporting more visitors this quarter than the same quarter last year and 58% of businesses noticing more international visitors. By comparison, 45% of businesses in Cowal noted an increase in turnover, 42% an increase in visitors numbers and 57% of businesses noticing an increase in international visitors.

However issues and barriers to further success still appear to exist with comments around problems with infrastructure, both physical and digital, getting significant mention. The weather and staffing issues in Cowal have been mentioned by businesses. The approaching winter season and the aforementioned barriers have led to 30% of businesses reporting being 'not very optimistic' or 'not at all optimistic' over the next 3 months. Optimism picks up when looking 12 and 24 months a head.

**Sample Size: 33**

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