

Insight Department

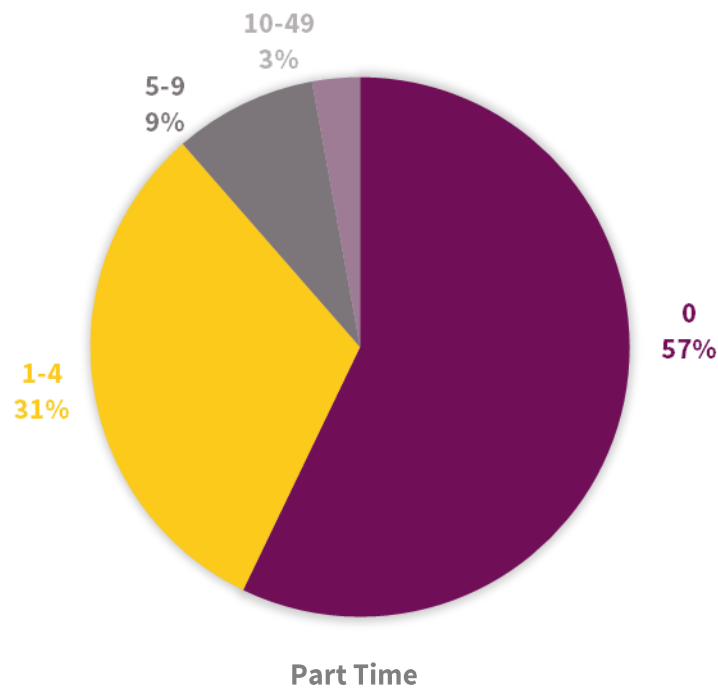
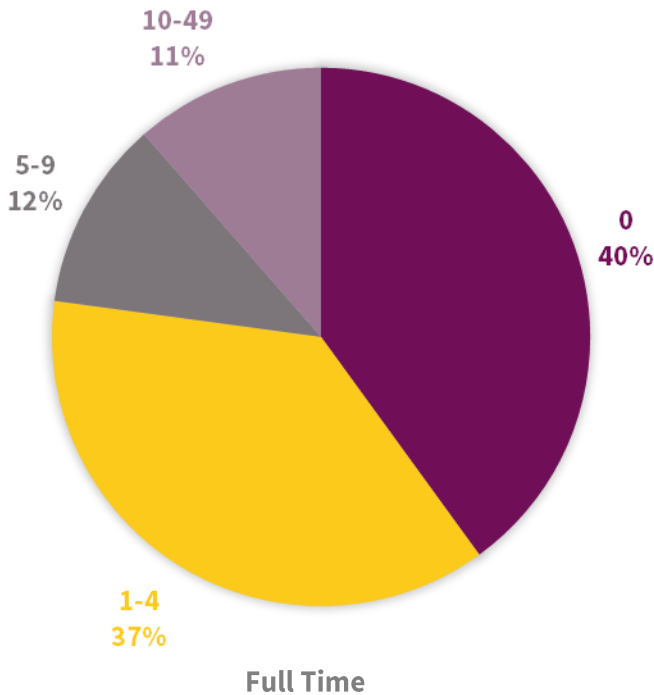
Cowal Tourism Industry Barometer – Q4 2017

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.

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	17%
Retail Operator	14%
Self-catering	37%
Tour Operator	6%
Visitor Attraction	3%

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



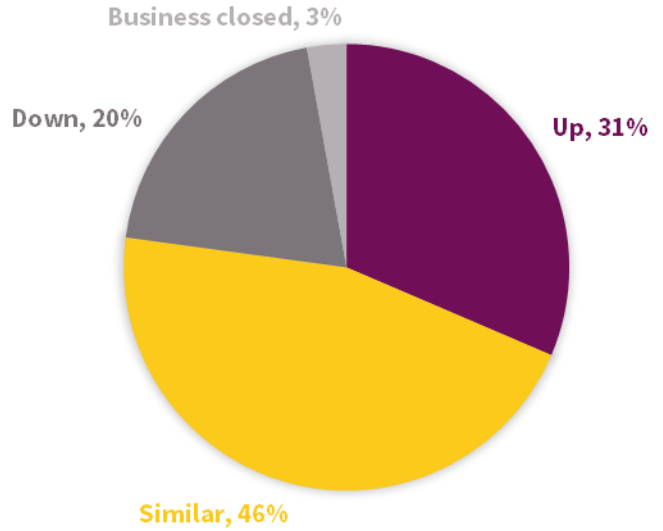
How does this compare to the same quarter last year?

Variation	Full Time Staff	Part Time Staff
More than last year	17%	20%
Same as last year	79%	80%
Less than last year	3%	0%

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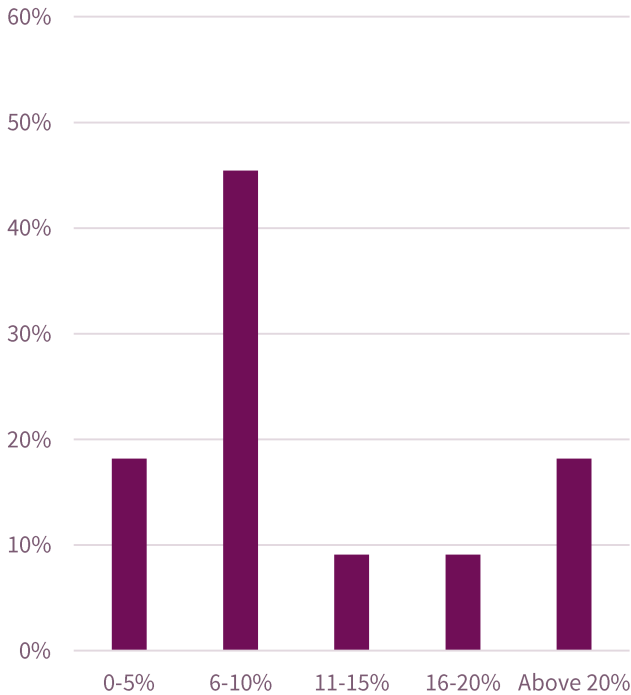
How did your turnover compare in this quarter compared to the same quarter last year?

Turnover Comparison	% of Responses
Up	31%
Similar	46%
Down	20%
Business closed	3%

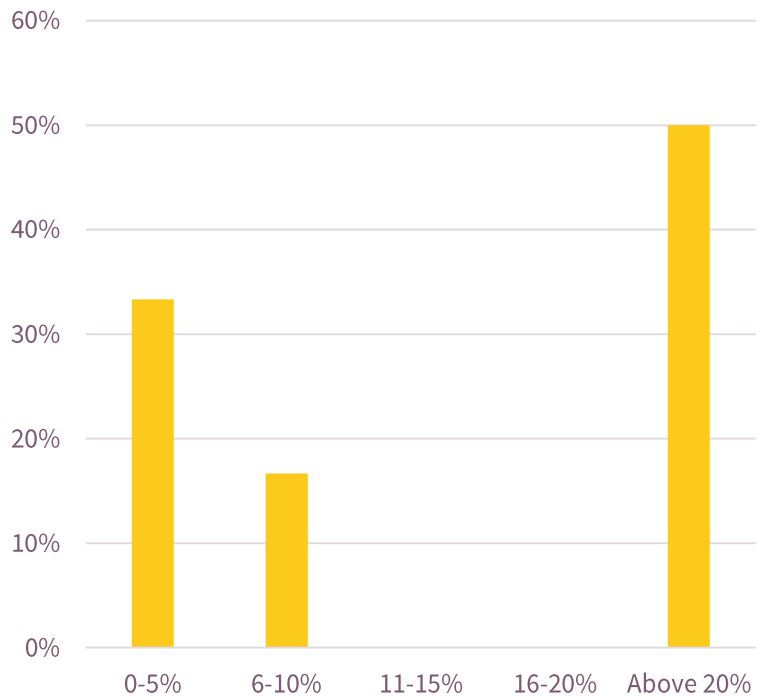


What was the percentage increase/decrease in your turnover?

Responses Indicating Increase in Turnover



Responses Indicating Decrease in Turnover

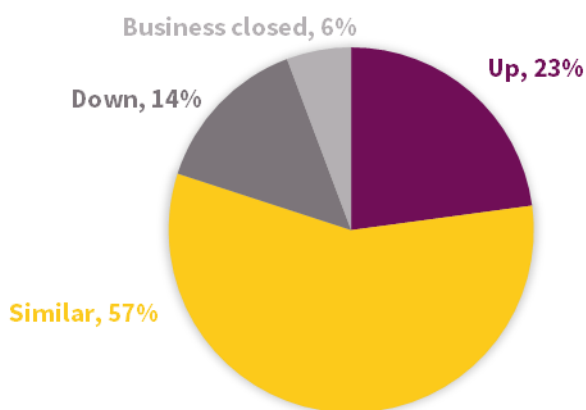


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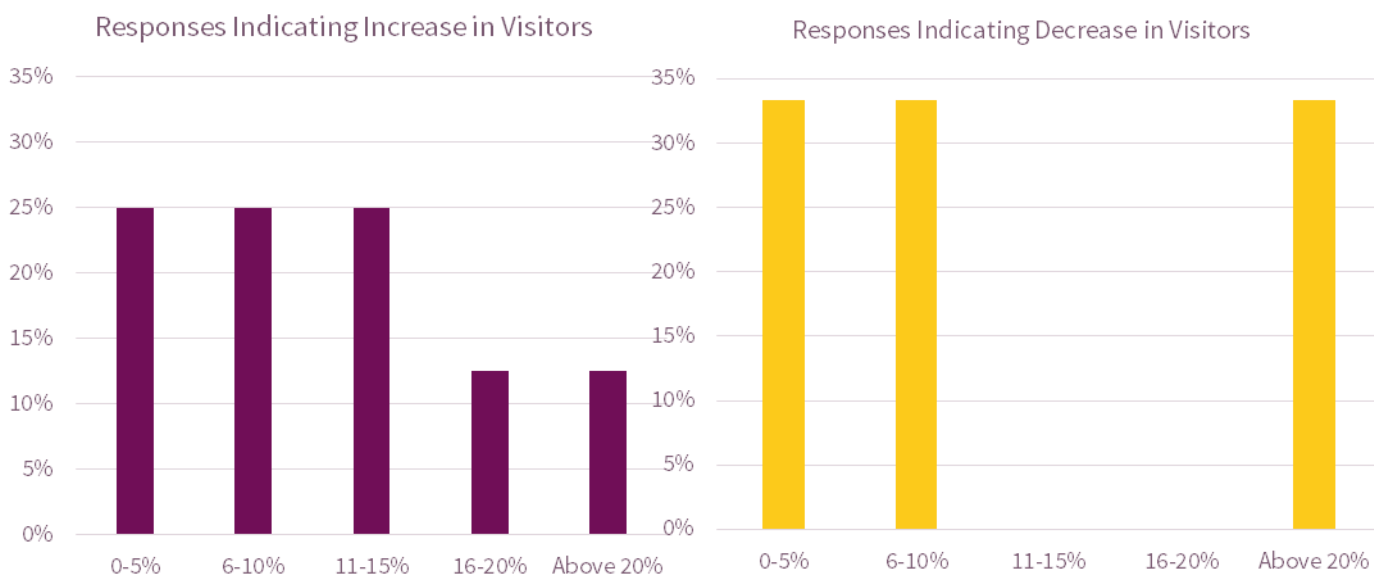
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How were your customer/visitor/guest numbers in this quarter compared to the same quarter last year?

Visitor Numbers	% of Responses
Up	23%
Similar	57%
Down	14%
Business closed	6%



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



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	16%	13%	31%	19%
Same/similar numbers	55%	71%	44%	55%
Less of these	13%	3%	13%	6%
Don't know	16%	13%	13%	19%

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

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

Discretionary Spend	% of Responses
No	80%
Yes	20%

Change in Spend	% of Responses
A large increase - over 15%	0%
A small increase - up to 15%	43%
No change	0%
A small decrease - up to 15%	43%
A large decrease - over 15%	14%

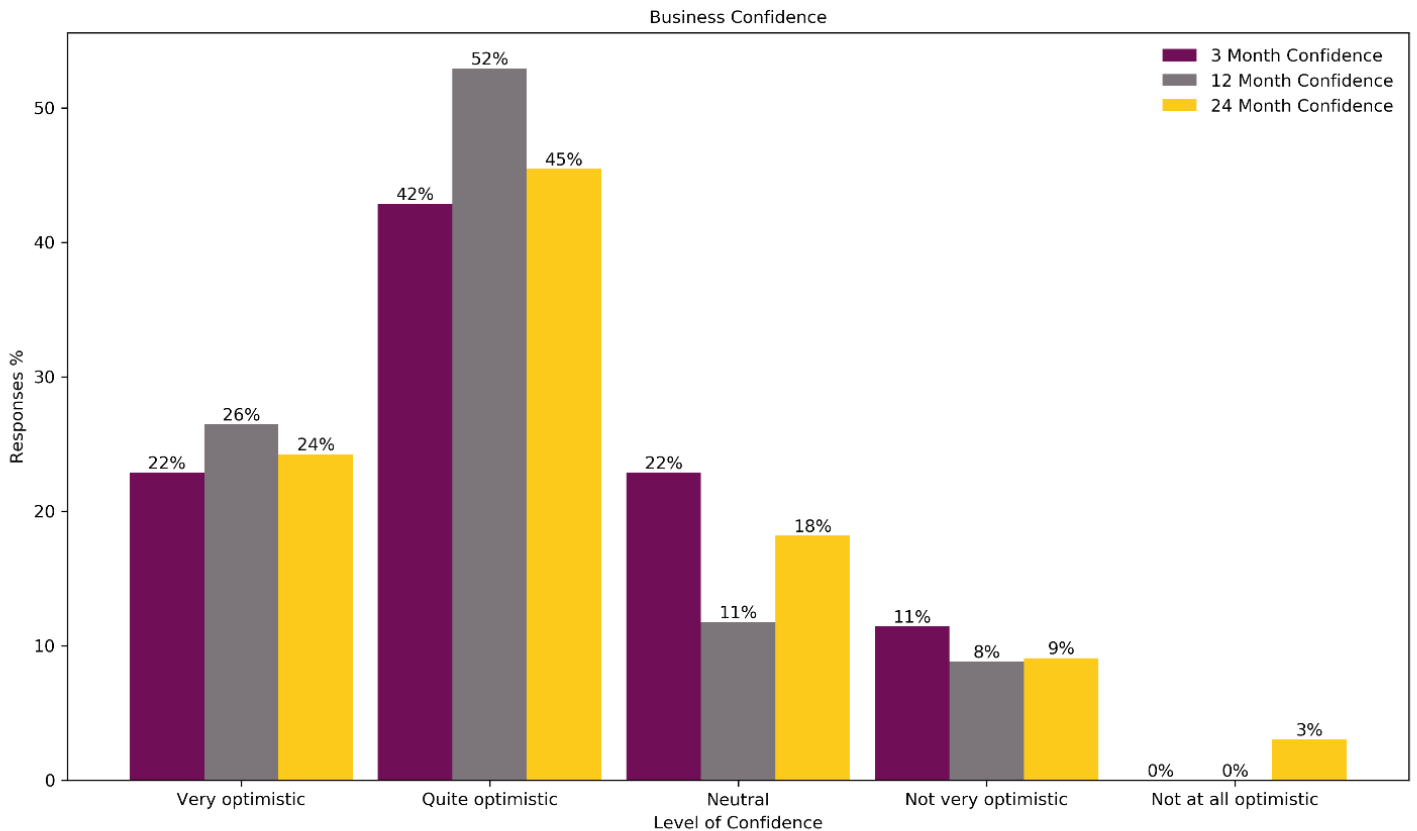
Do you have any plans to significantly invest in your business in the near future?

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

Business Investment	% of Responses
No	37%
Yes	63%

Period of Investment	% of Responses
Next 12 months	77%
Between 12 and 18 months	14%
Between 18 months and 2 years	9%
Over 2 years	0%
Don't know	0%

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



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As with Argyll and the Isles, Cowal specifically has reported a successful Q4 for tourism businesses in the area, with 77% of businesses achieving similar or increased turnover compared with 2016, and the vast majority of the increases sitting in the range of 6-10%, however of those businesses that experienced a decrease in turnover, half indicated a significant drop (>20%).

Of the businesses surveyed, over half saw no significant change in the number of visitors to Cowal, and only 20% of businesses saw any change in the discretionary spend of these visitors. The majority of responses indicate marginal changes in visitor spend, within 15% either way.

The business confidence of those operating in the area remains strong, with 78% indicating they are optimistic about the coming 12 months, and this is reflected in almost two thirds of businesses intending to invest, and the majority of this investment to come in the next 12 months. This level of intention to invest is stronger than in the Argyll and the Isles area.

Employment in the tourism sector in Cowal remains steady, with no decrease in the number of part time staff employed, and around 80% of all staff levels remaining constant.

Many challenges faced in Q4 are related to seasonality, such as weather and businesses being closed. As with the wider area, transport links and internet connectivity issues are prevalent. There are also concerns around the attractiveness of Cowal as a visitor destination, although investment in marketing and upgrades of the area were noted.



Sample Size: 35

Disclaimer:

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