

Insight Department

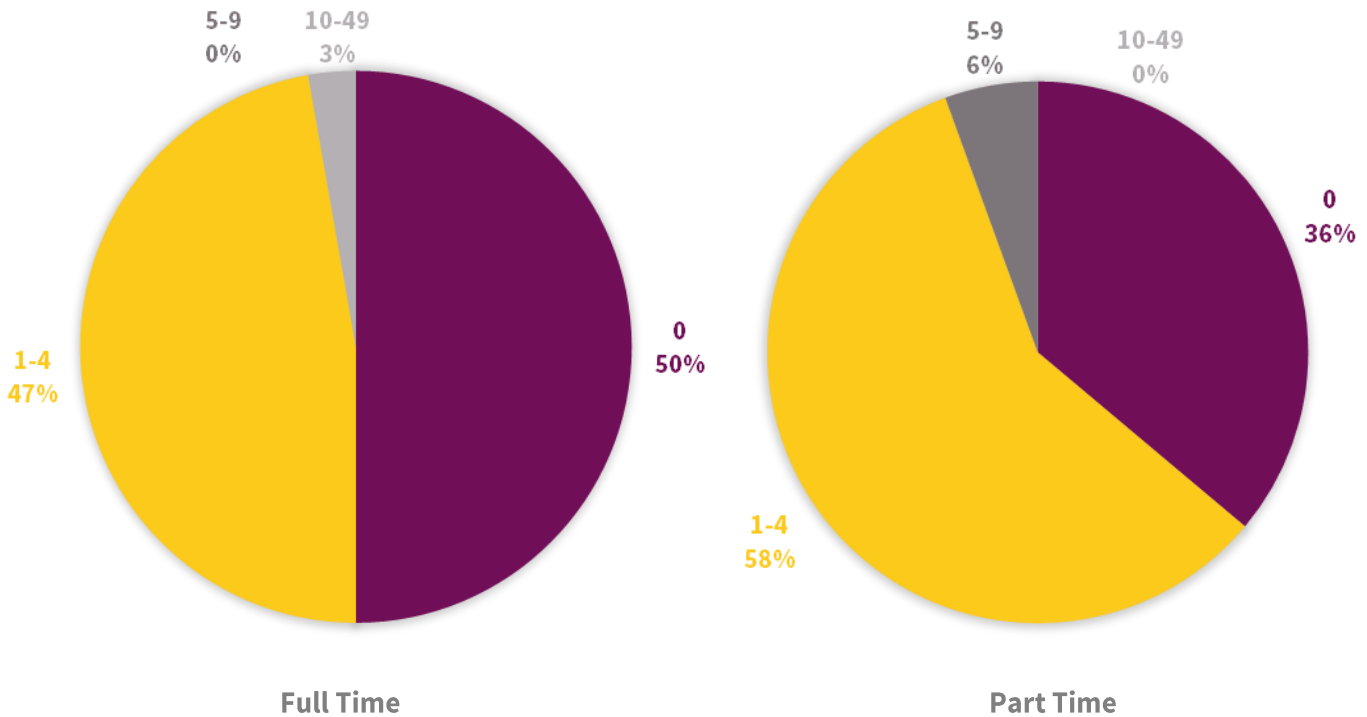
Islay, Jura & Colonsay Tourism Industry Barometer – Q4 2017

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	19%
Other	11%
Outdoor Activity Operator	3%
Restaurant/Cafe/Pub	53%
Retail Operator	6%
Self-catering	8%
Tour Operator	19%
Visitor Attraction	11%

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



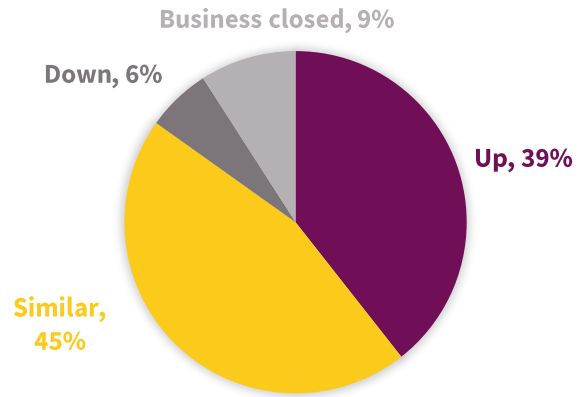
How does this compare to the same quarter last year?

Variation	Full Time Staff	Part Time Staff
More than last year	25%	20%
Same as last year	75%	80%
Less than last year	0%	0%

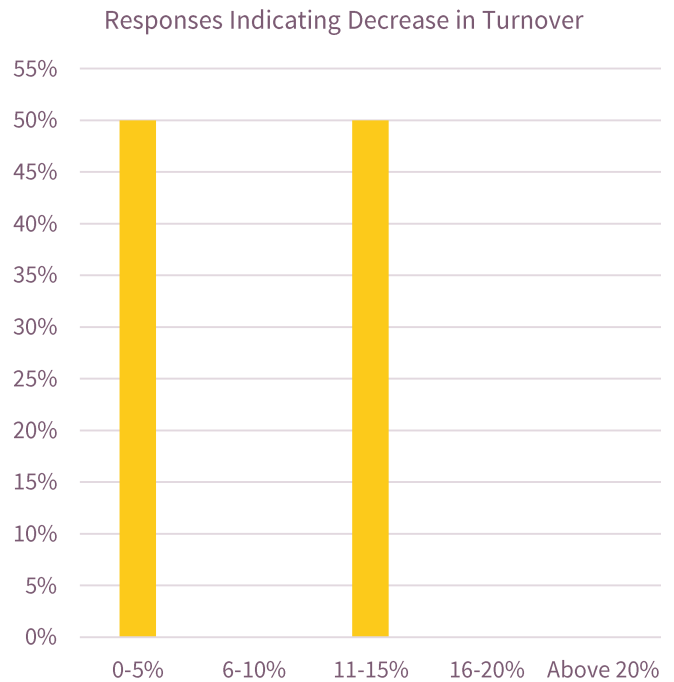
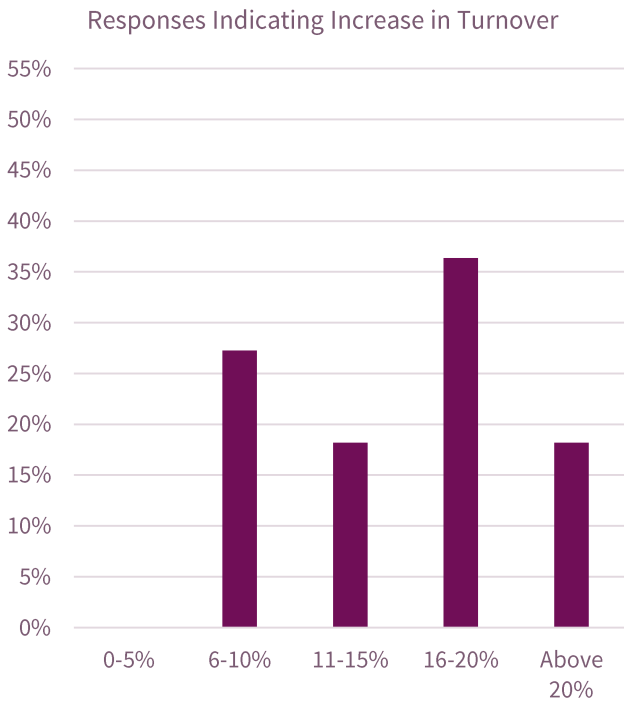
Insight Department Islay, Jura & Colonsay Tourism Industry Barometer – Q4 2017

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

Turnover Comparison	% of Responses
Up	39%
Similar	45%
Down	6%
Business closed	9%



What was the percentage increase/decrease in your turnover?

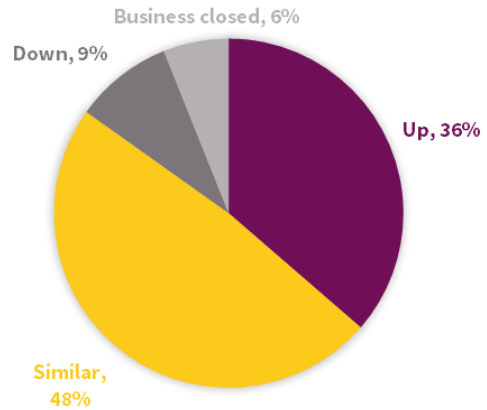


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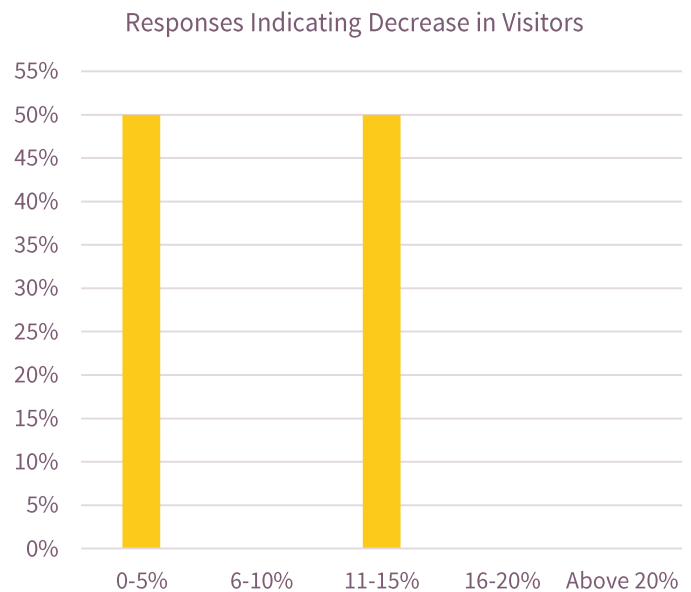
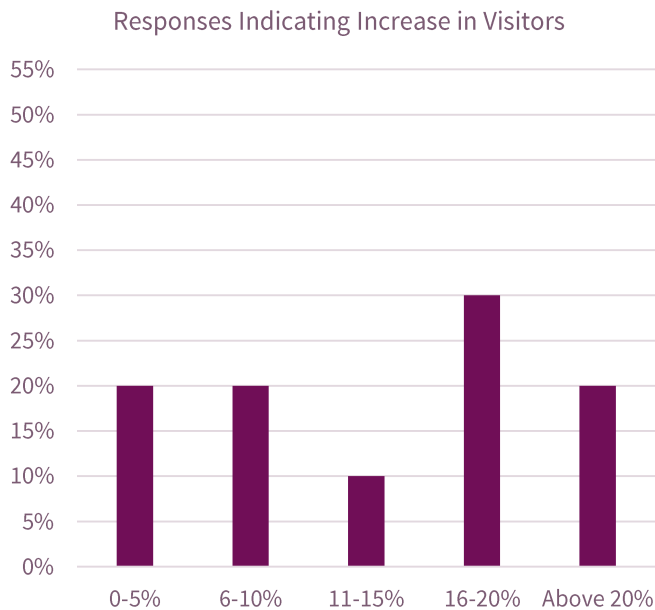
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How were your customer/visitor/guest numbers in this quarter compared to the same quarter last year?

Visitor Numbers	% of Responses
Up	36%
Similar	48%
Down	9%
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	20%	20%	23%	58%
Same/similar numbers	80%	72%	65%	38%
Less of these	0%	8%	8%	0%
Don't know	0%	0%	4%	4%

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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	88%
Yes	12%

Change in Spend	% of Responses
A large increase - over 15%	25%
A small increase - up to 15%	0%
No change	0%
A small decrease - up to 15%	50%
A large decrease - over 15%	0%
Not applicable	25%

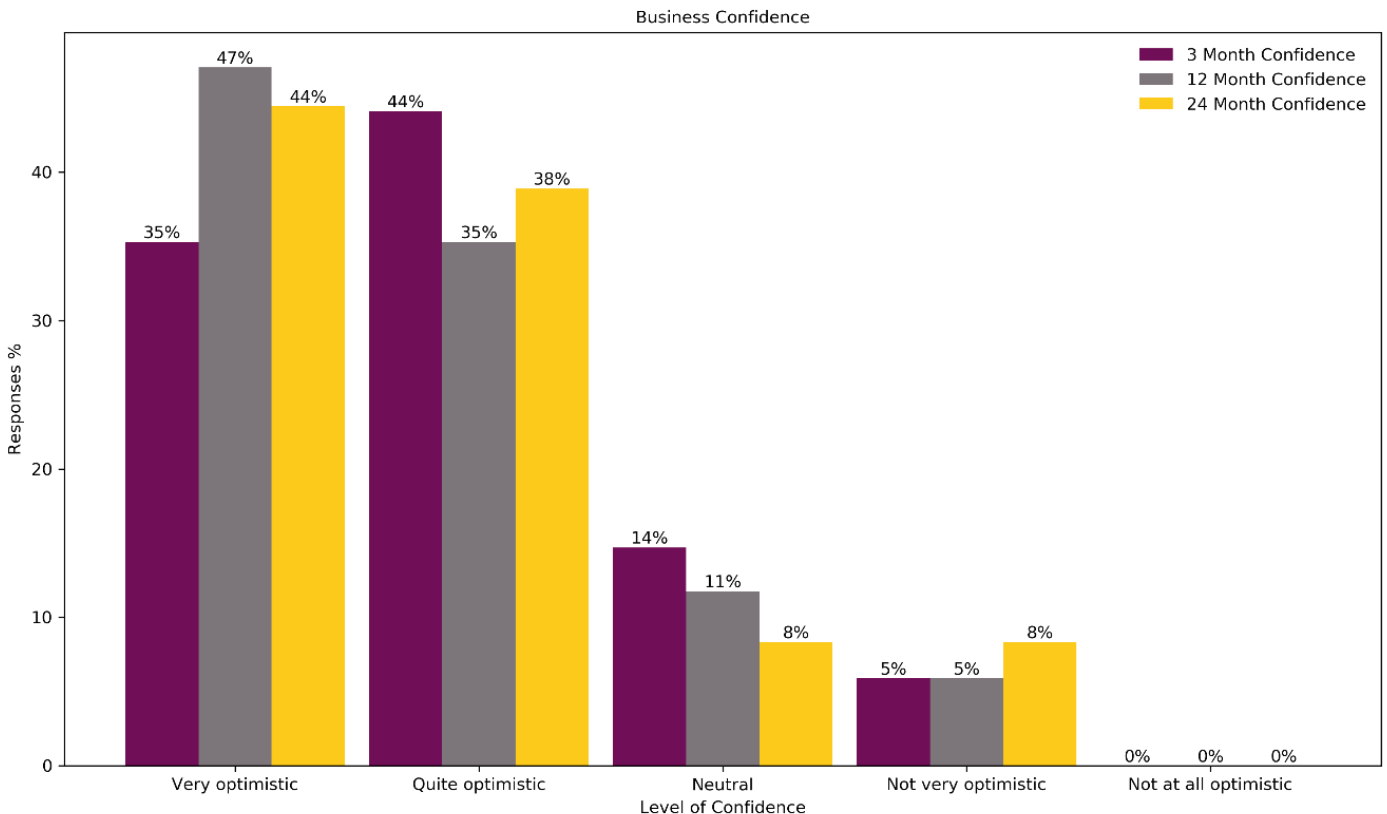
Do you have any plans to significantly invest in your business in the near future?

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

Business Investment	% of Responses
No	47%
Yes	53%

Period of Investment	% of Responses
Next 12 months	47%
Between 12 and 18 months	11%
Between 18 months and 2 years	5%
Over 2 years	37%
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 overall, Islay, Jura and Colonsay seems to have had a fairly positive Q4 of 2017 with over a third of businesses noticing an increase in visitors, and nine percent highlighting a drop in visitor numbers. Similarly, almost two fifths of businesses experienced an increase in turnover this quarter, all reported to be greater than 5%. As to be expected in the winter months, many businesses commented on seasonality, weather and closures being barriers to success this quarter.

Almost 60% of tourism businesses noted an increased number of international visitors to the Islay, Jura and Colonsay area during Q4. international visitors to Scotland tend to spend more during visits, however, this doesn't appear to have impacted the discretionary spend of visitors to the area, with 88% of businesses noting no change in this figure.

The business confidence of those operating in the area remains strong, with 79% indicating they are optimistic about the coming three months, increasing to 82% over the 12 and 24 month periods. Despite this confidence, only 53% of businesses intend to invest in their operation, and of those interested in investing, less than half are planning to spend in the coming 12 months, with 40% holding off for more than two years. One area for concern for businesses in the area is the unknown impact of Brexit, which would explain hesitance from those in the tourism industry to make significant changes until operating in a post-Brexit environment.

Employment in the tourism sector in Islay, Jura and Colonsay remains steady, with no reduction in staff levels at all, and around 25% of businesses being able to increase the number of full time staff.

As with the wider area transport problems, related to ferries and roads, and internet connectivity issues are seen as barriers to success. There are also concerns around the marketing of the Islay, Jura and Colonsay area as a visitor destination, however many businesses noted an increase in enquiries and bookings and are optimistic about the future of tourism in the area.



Sample Size: 36

Disclaimer:

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