

Insight Department

Argyll & The Isles Tourism Industry Barometer – Q3 2017

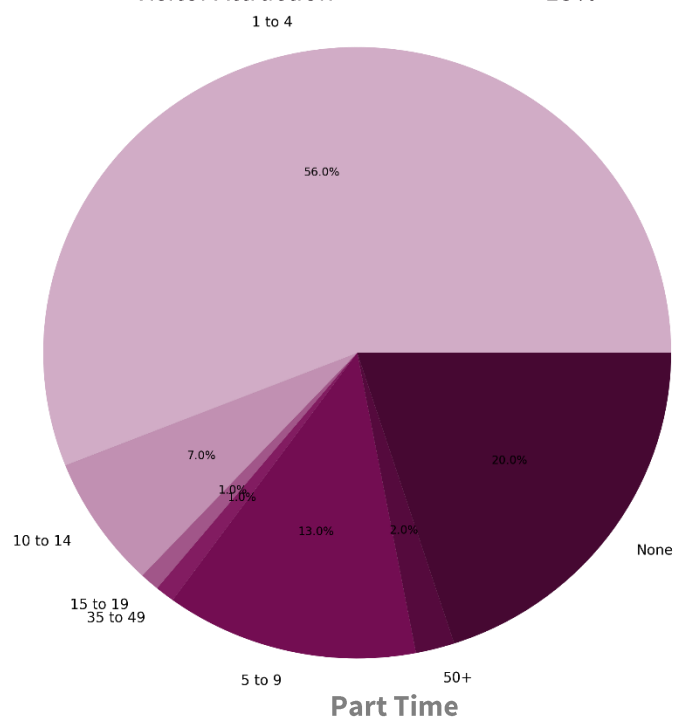
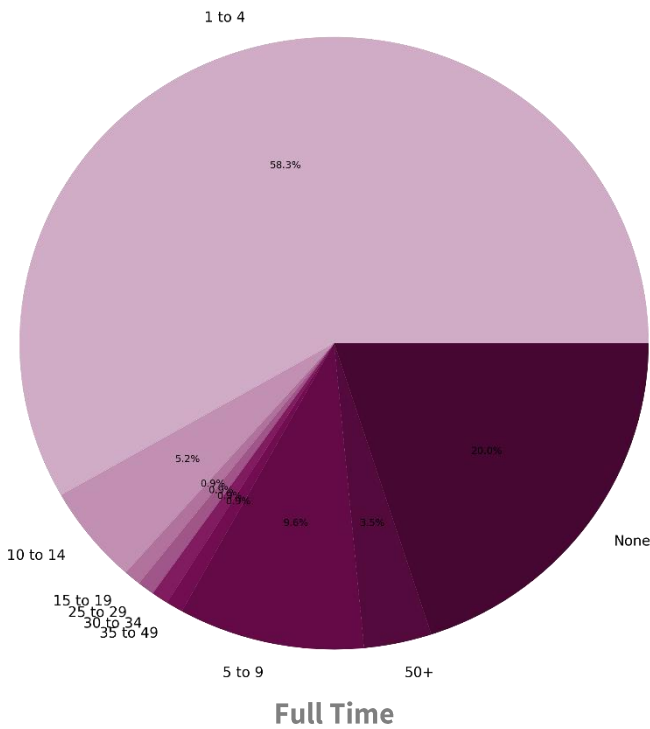
The Scottish Tourism Industry Barometer is a collaborative initiative with VisitScotland, Local Authorities, DMO's, and businesses within Scotland, designed to inform and provide stakeholders with an overview of tourism performance at a regional and local level on a quarterly basis.

Where is your business based?

Area	Responses
Coll and Tiree	1%
Cowal	23%
Helensburgh and Clyde Sea Lochs	7%
Islay, Jura and Colonsay	13%
Isle of Bute	4%
Kintyre and Gigha	15%
Mid Argyll and Inveraray	14%
Mull and Iona	13%
Oban and Lorn	10%

How would you describe the main activity of your business?

Type of Business	Responses
Caravan/Camping	2%
Hostel	1%
Hotel/B&B/Guesthouse	20%
Other	8%
Outdoor Activity Operator	4%
Restaurant/Cafe/Pub	3%
Retail Operator	7%
Self-catering	37%
Tour Operator	2%
Transport & Tours	3%
Visitor Attraction	13%



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	21%	14%
Same as last year	74%	77%
Less than last year	5%	9%

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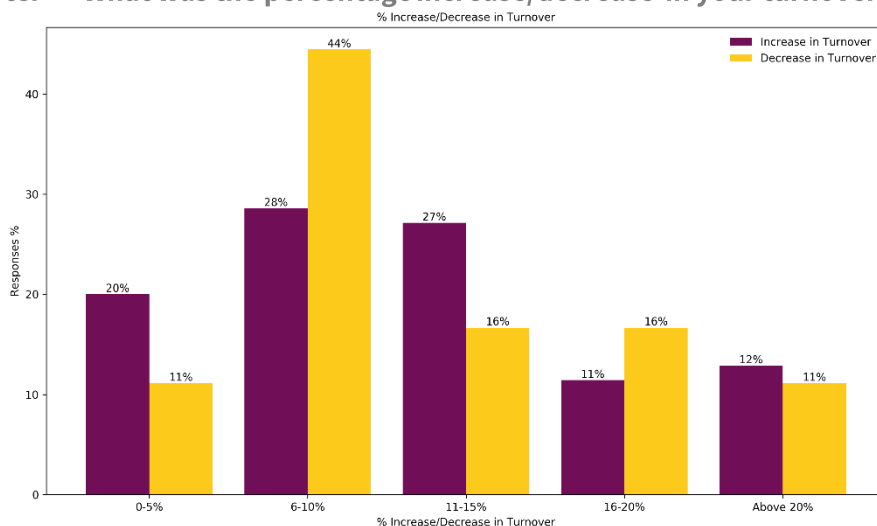
What was your average room occupancy for this quarter (%)?

Occupancy (%)	Serviced Room Occupancy	Self Catering Occupancy
0-10%	4%	6%
11-20%	0%	6%
31-40%	4%	2%
41-50%	15%	4%
51-60%	4%	8%
61-70%	19%	8%
71-80%	8%	23%
81-90%	23%	17%
91-100%	23%	27%

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

Turnover Comparison	% of Responses
Up	50%
Similar	35%
Down	13%
Business closed	1%

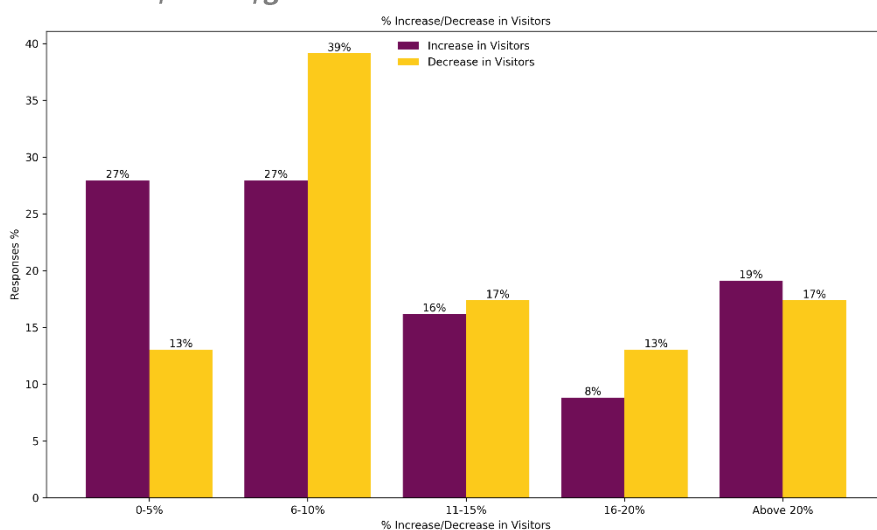
What was the percentage increase/decrease in your turnover?



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

Visitor Numbers	% of Responses
Up	48%
Similar	34%
Down	16%
Business closed	1%

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	51%
Yes	49%

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

Period of Investment	% of Responses
Next 12 months	53%
Between 12 and 18 months	13%
Between 18 months and 2 years	14%
Over 2 years	11%
Don't know	9%

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

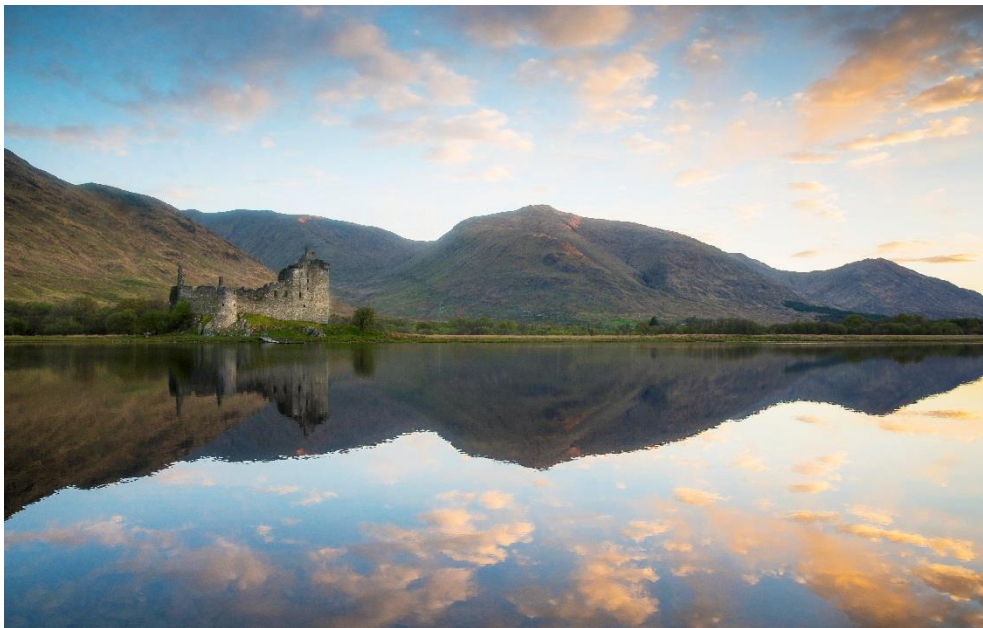
Discretionary Spend	% of Responses
No	75%
Yes	25%

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%	6%
A small increase - up to 15%	43%
No change	3%
A small decrease - up to 15%	26%
A large decrease - over 15%	20%

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

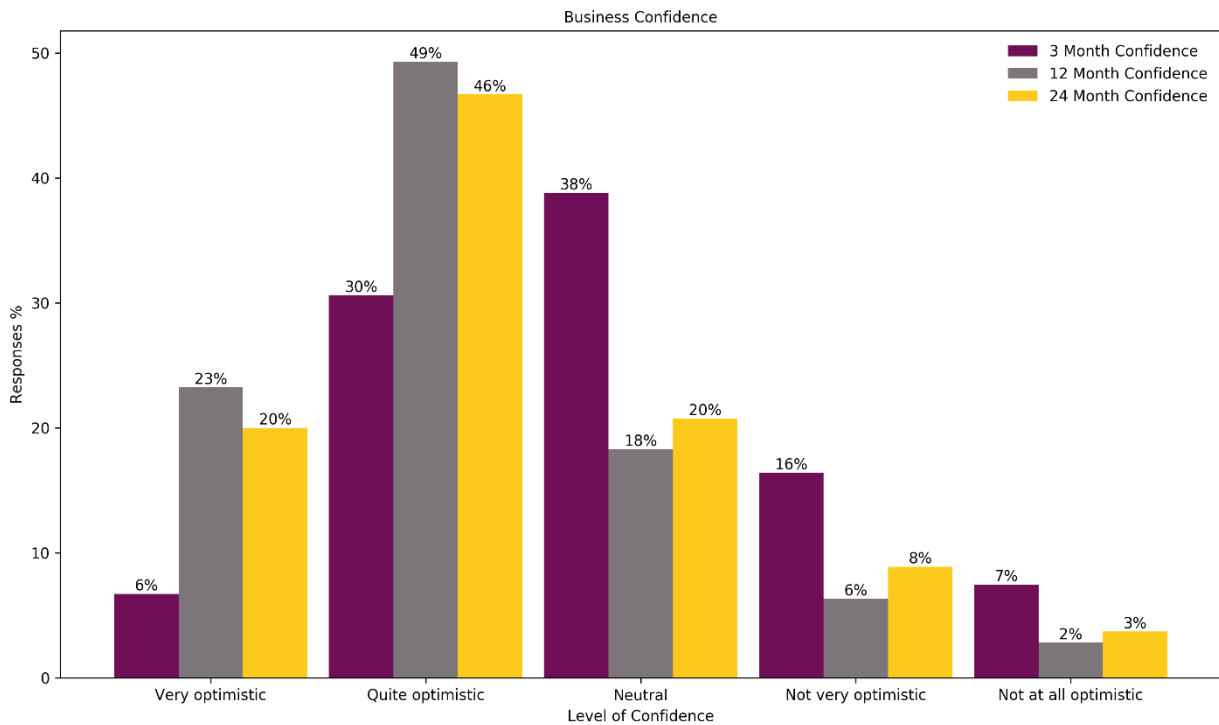
Change	Local (%)	Rest of Scotland (%)	Rest of UK (%)	Overseas (%)
More of these	17%	28%	39%	58%
Same/similar numbers	58%	55%	43%	26%
Less of these	15%	10%	11%	10%
Don't know	10%	7%	7%	6%



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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.

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 highly concentrated seasonality of tourism in Argyll and Bute has been mentioned with an appetite for a better distribution of numbers throughout the year. This is reflected in the slightly higher levels of negative optimism over the next 3 months as we approach winter. Whilst other issues such as political and economic were mentioned, overall businesses seem optimistic about business over the next 12-24 months showing that consumers are resilient to the changing horizon and still looking to head to Argyll and The Isles for holidays.

Businesses believe there could be opportunities in the area for a cohesive and collaborative marketing campaign between localised areas to drive tourism to particular spots within Argyll and The Isles for better sustainable economic growth.

Sample Size: 144

Disclaimer:

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2017 Version 1.0

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