

# LOCAL TOURISM INDUSTRY BAROMETER

Q4 (October – December) 2019

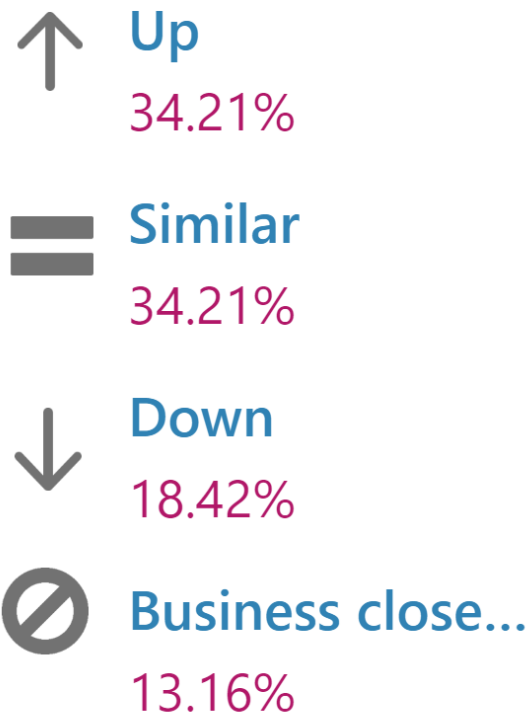


Angus

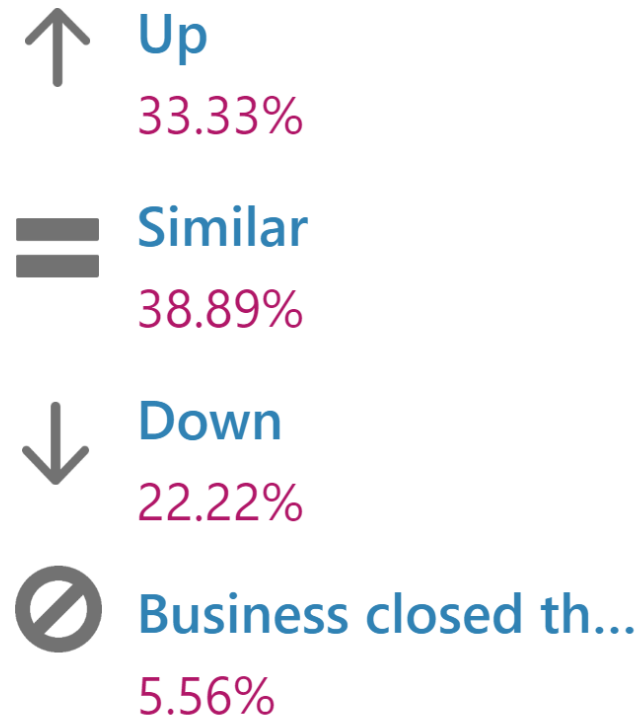
Report Sample Size: 38



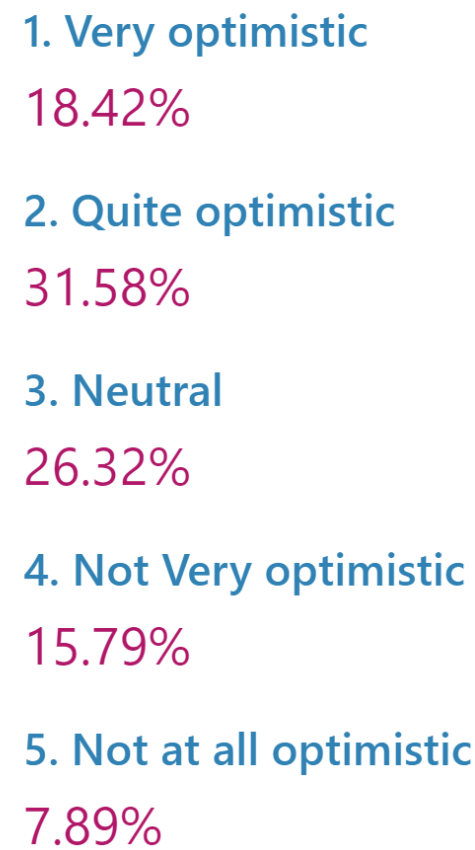
How are your **visitor numbers** compared to same quarter last year?



How does your **turnover** compared to same quarter last year?



How **optimistic** are you for the next 3 months?

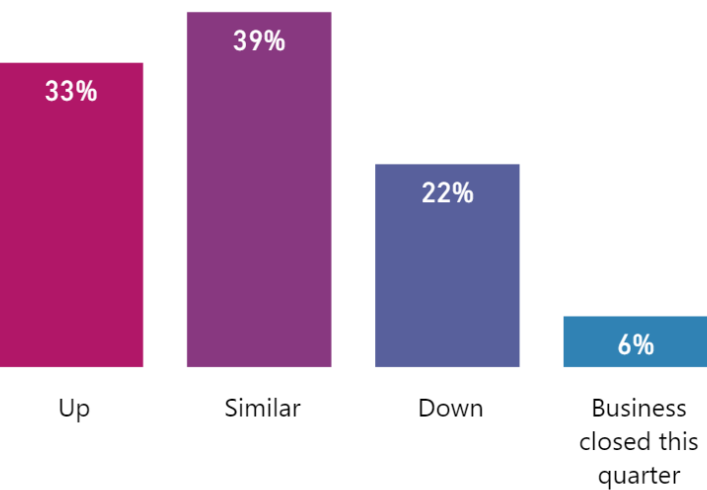


Financial Performance for:

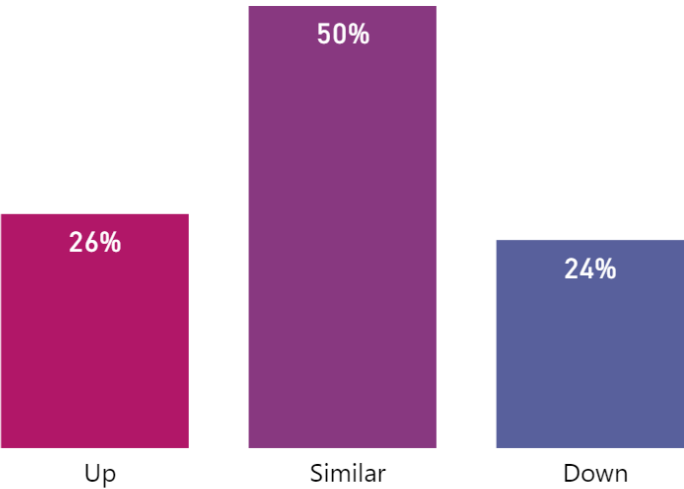
Angus

for: 2019 Q4

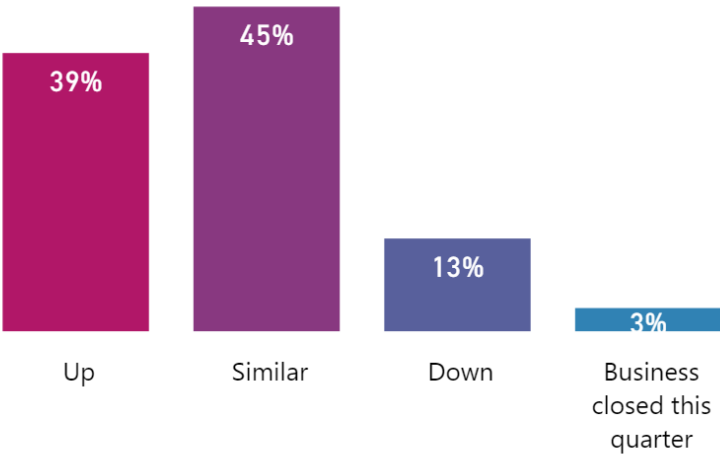
Turnover compared to same quarter last year



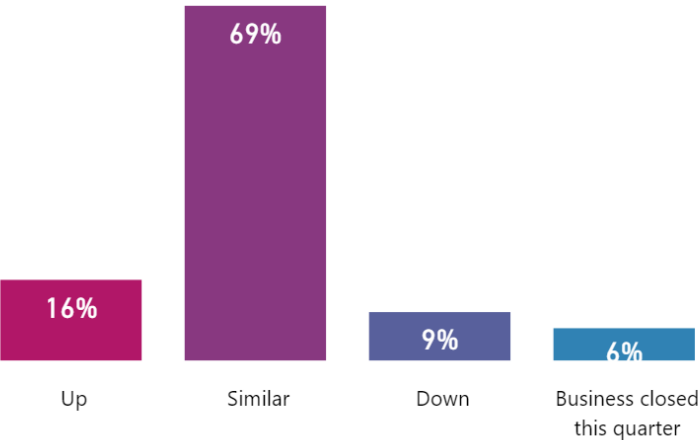
Profit compared to same quarter last year



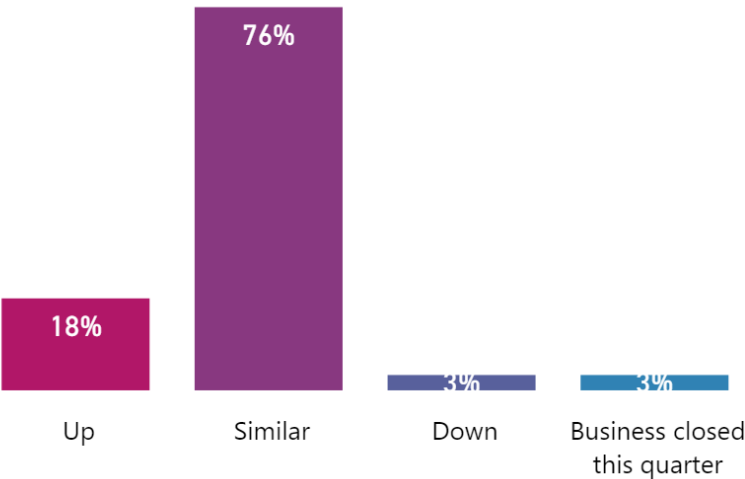
Staff costs compared to same quarter last year



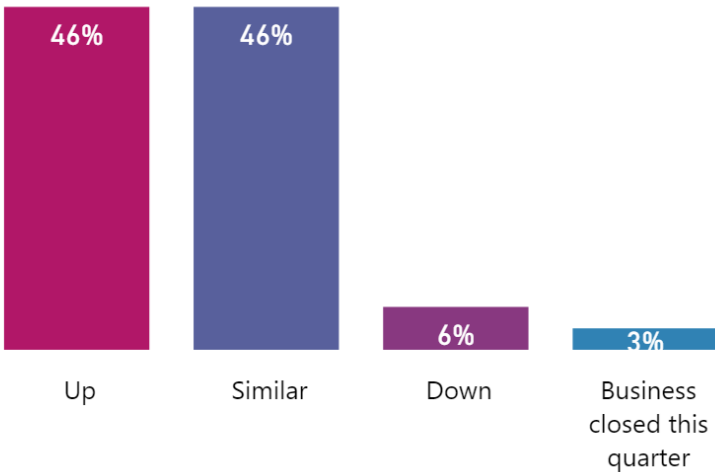
Change in discretionary income?



Prices charged compared to same quarter last year



Input costs compared to same quarter last year



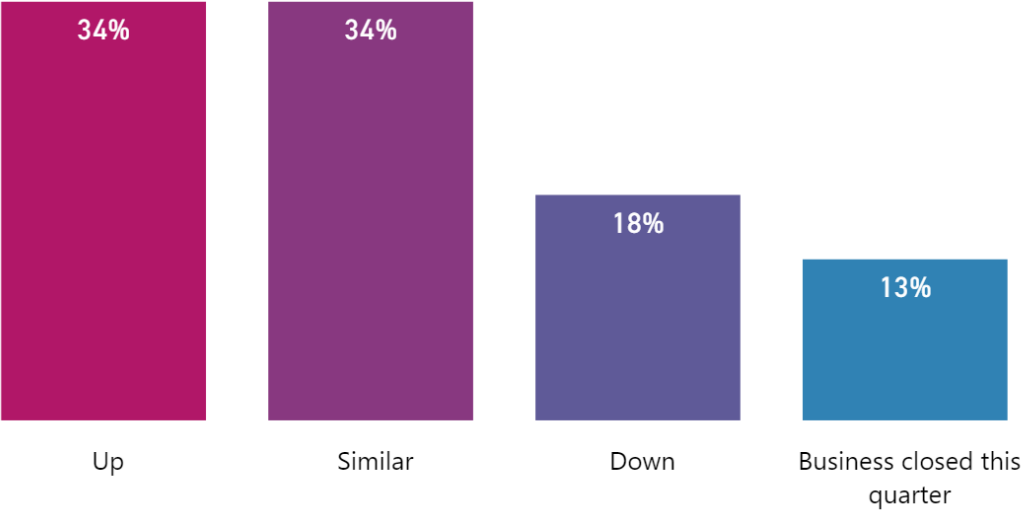
# Visitor Performance for:

Angus

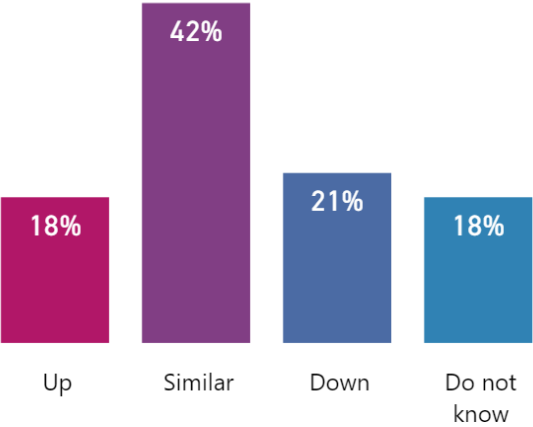
for: 2019 Q4

Have you seen a change in visitors from:

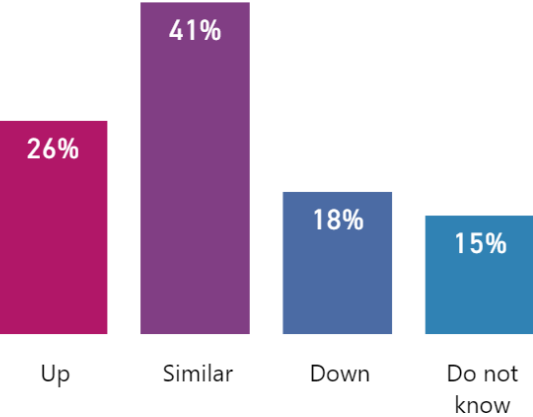
Visitor numbers compared to same quarter last year



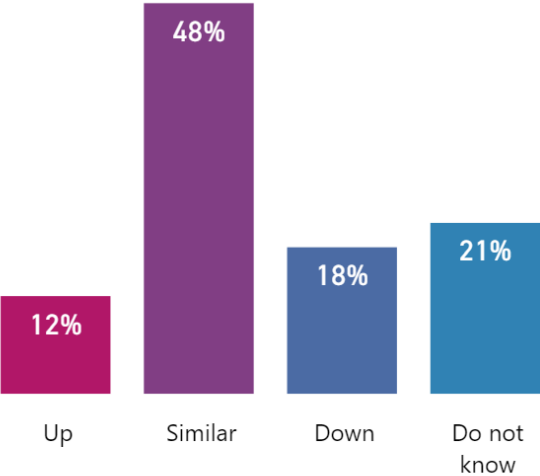
Your local area



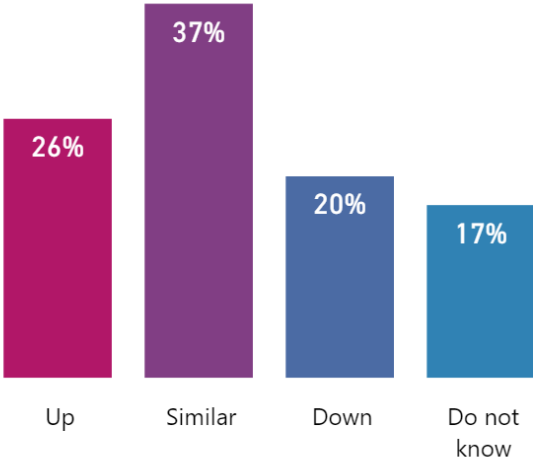
Elsewhere in Scotland



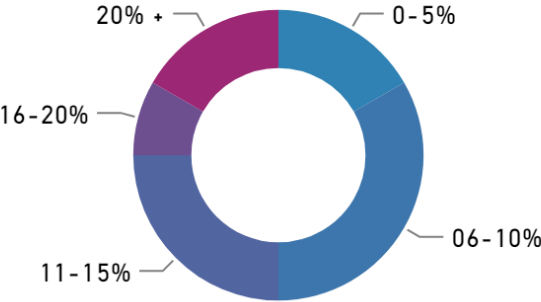
Rest of UK (England/Wales/NI)



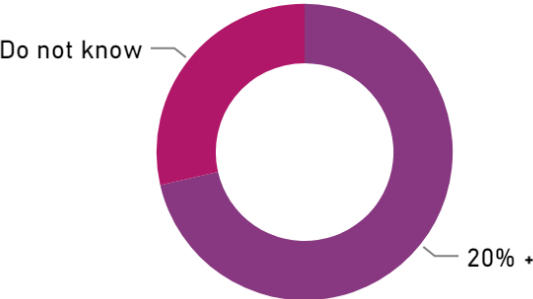
Overseas



Percentage increase in your visitor numbers



Percentage decrease in your visitor numbers



Optimism for:

Angus



for:

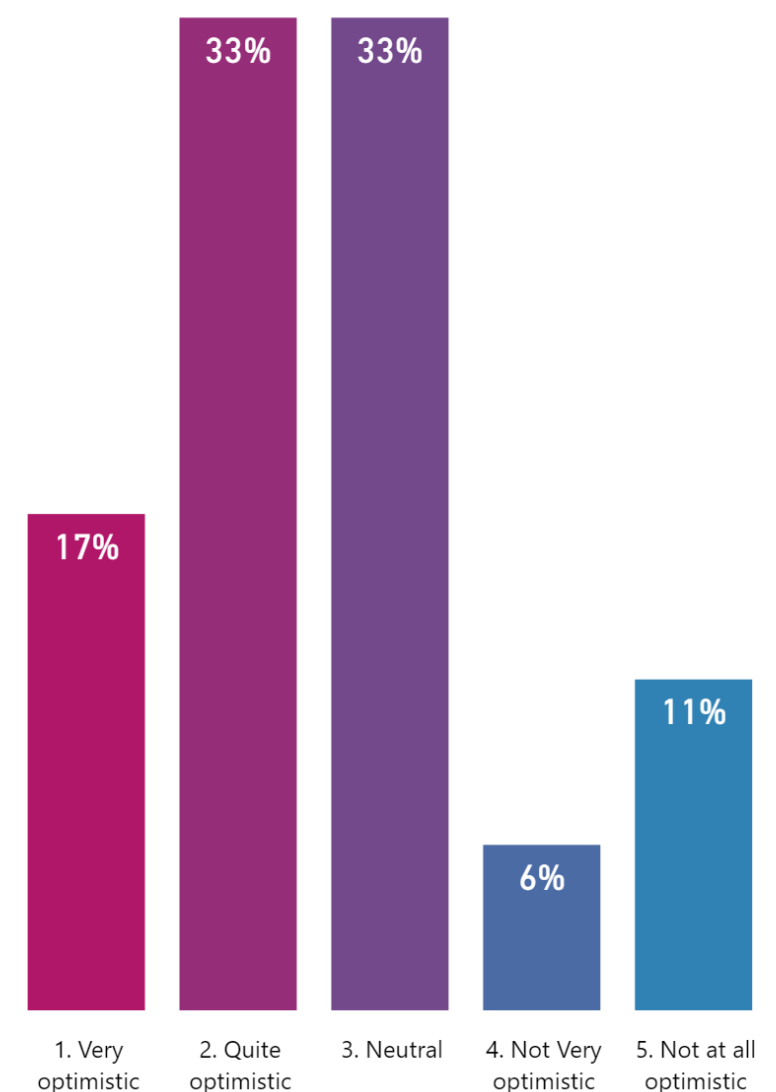
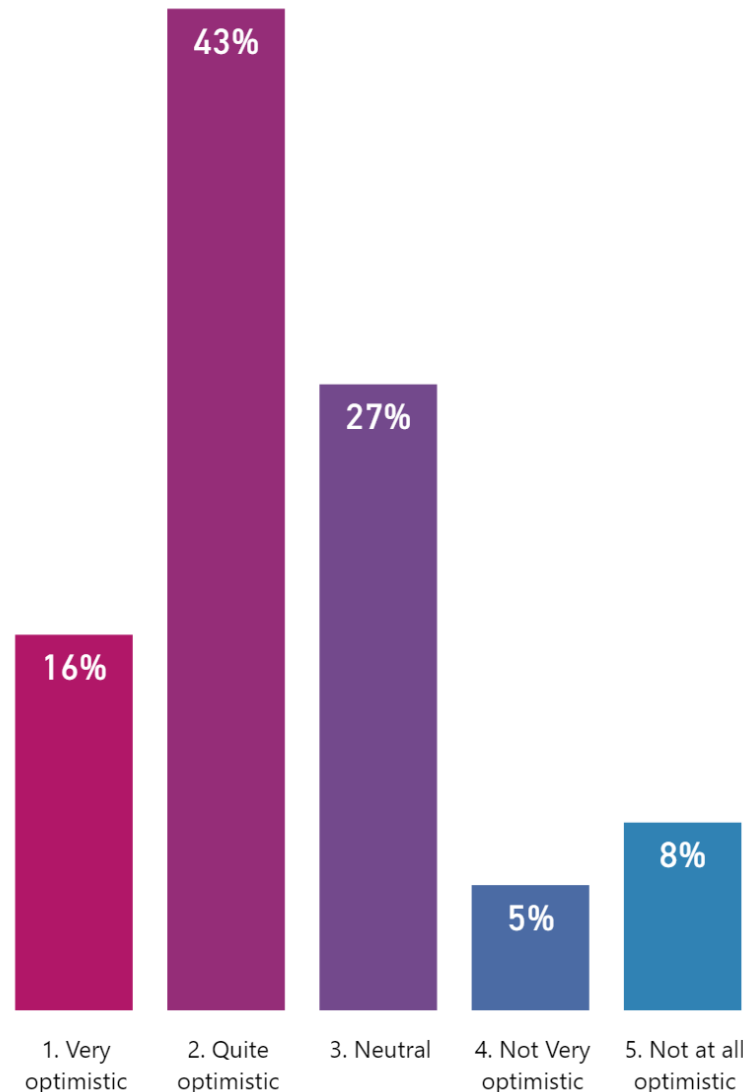
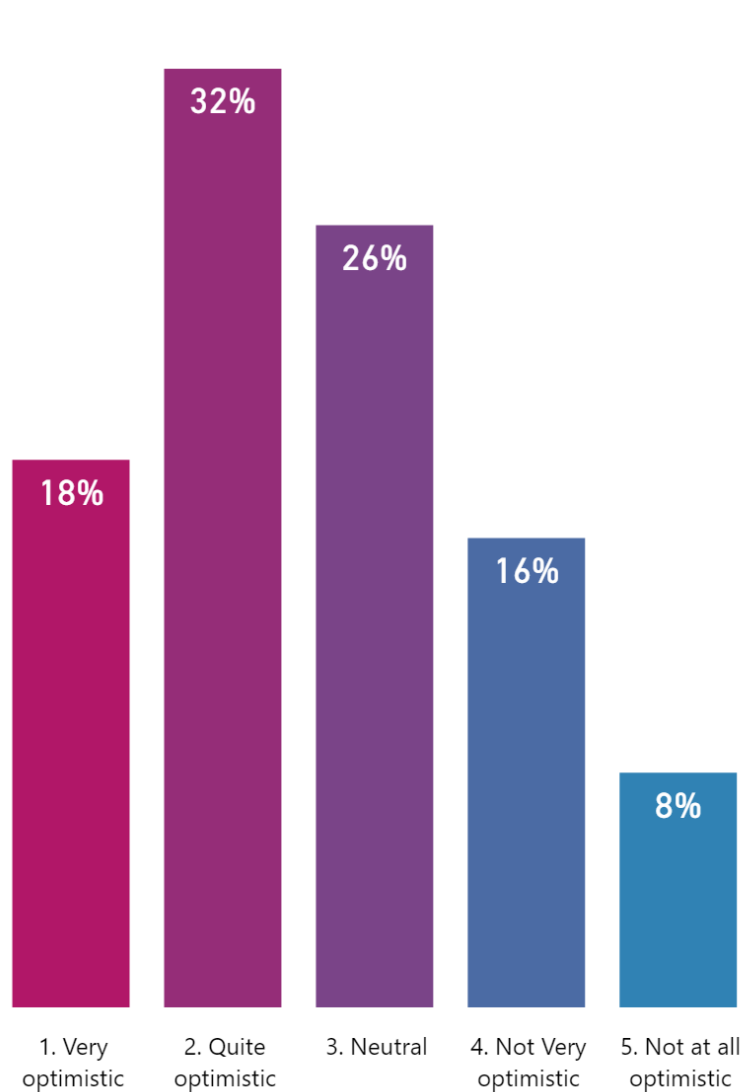
2019 Q4



Optimism for the next 3 months

Optimism for the next 12 months

Optimism for the next 24 months

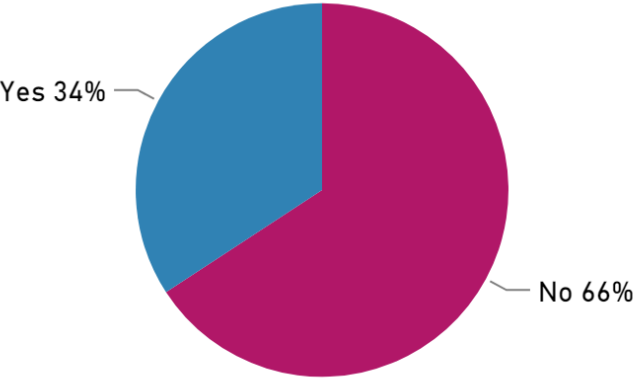


Investment & Barriers for:

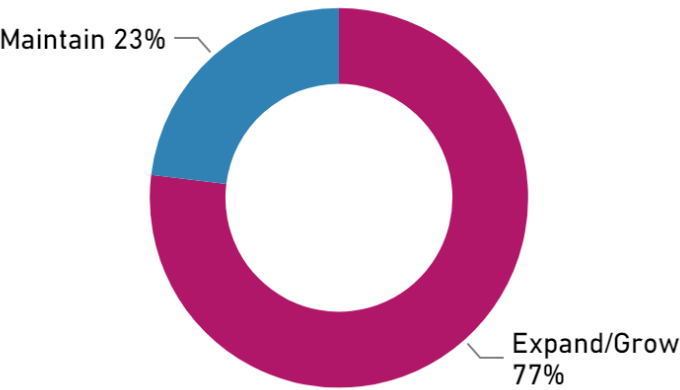
Angus

for: 2019 Q4

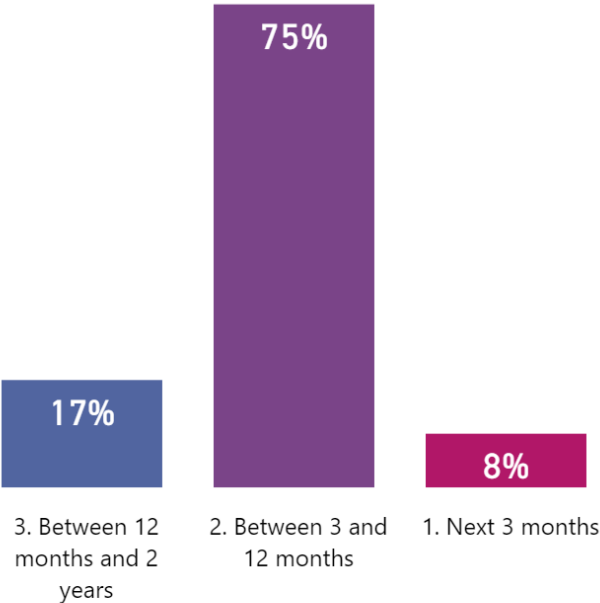
Do businesses have plans to invest?



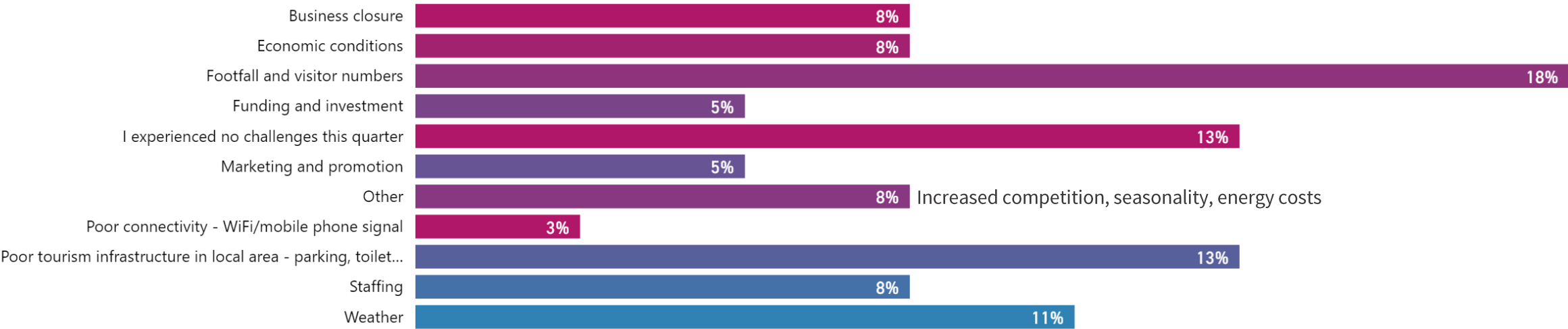
Is planned investment to maintain standards or to expand?

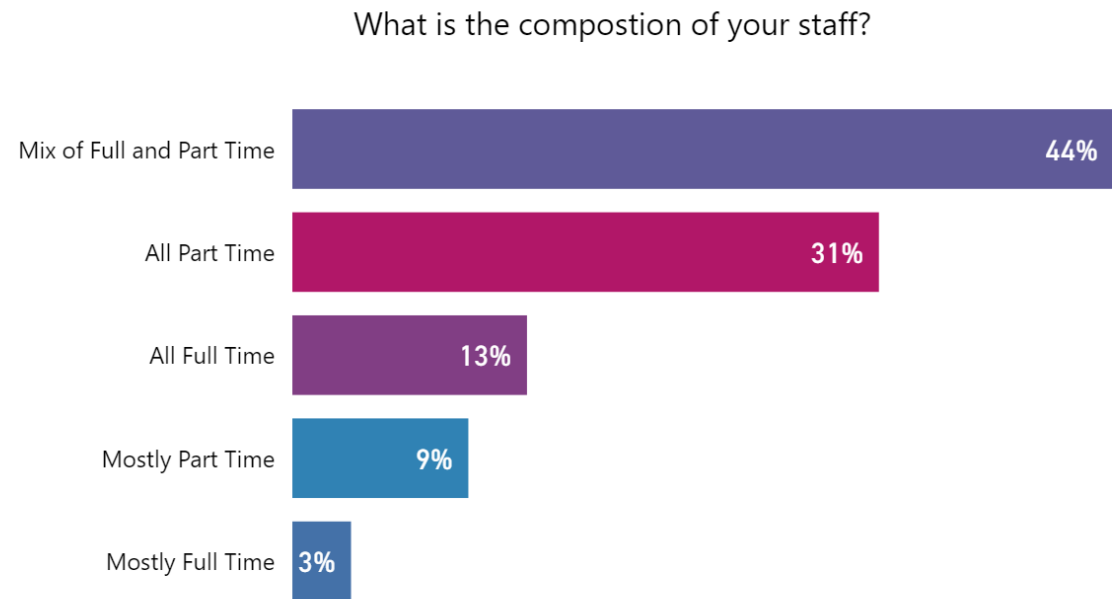
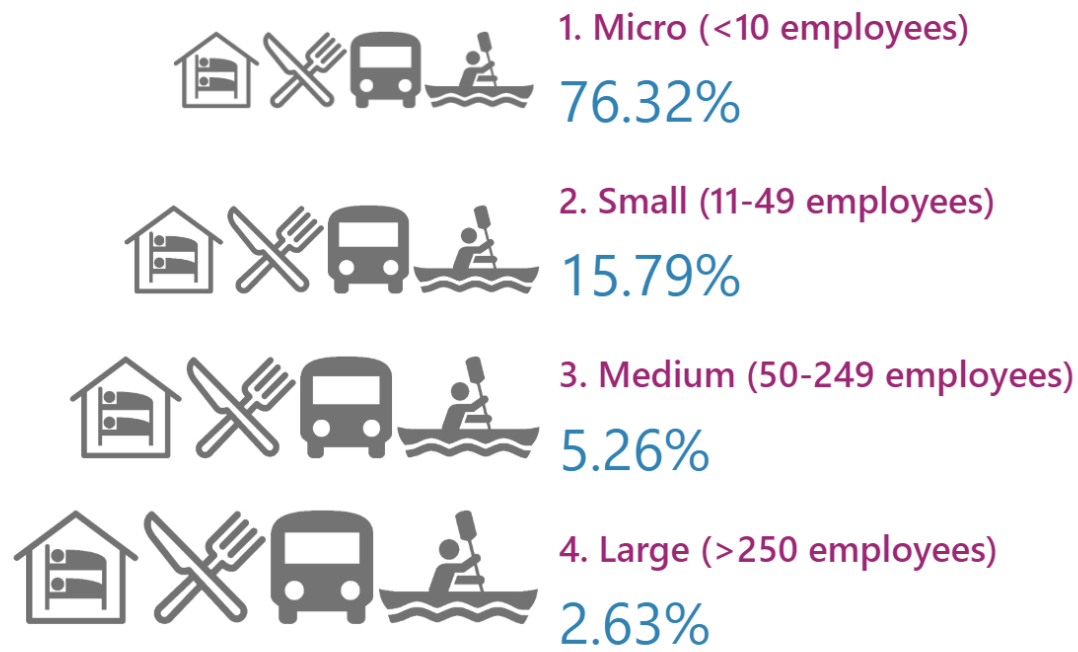


Period of planned investment

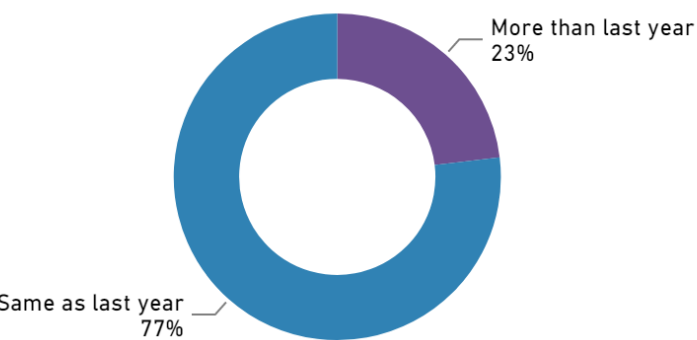


Main Barriers to Success

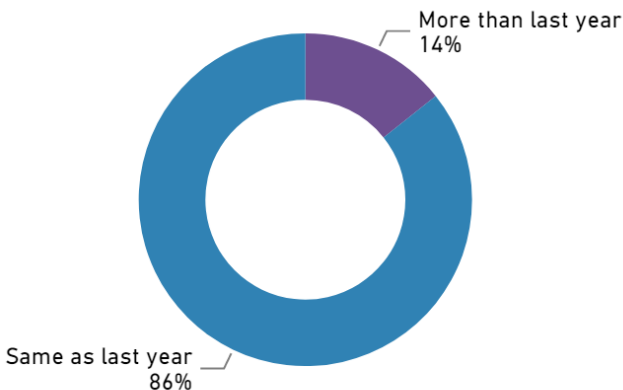




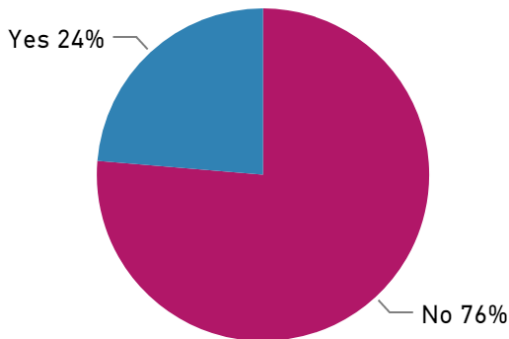
Level of part-time compared to same quarter last year



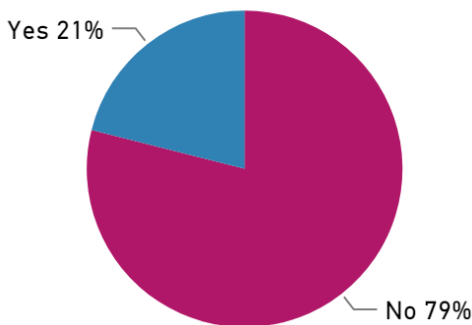
Level of full-time compared to same quarter last year



Do you have any voluntary staff?

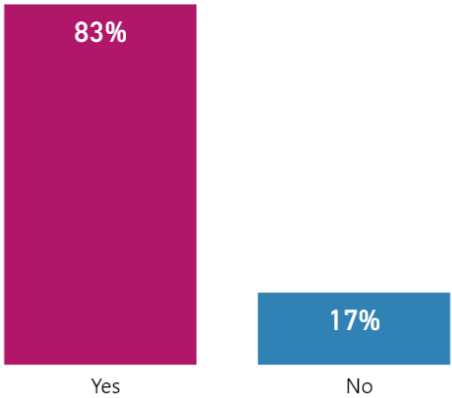


Did your business employ seasonal staff?

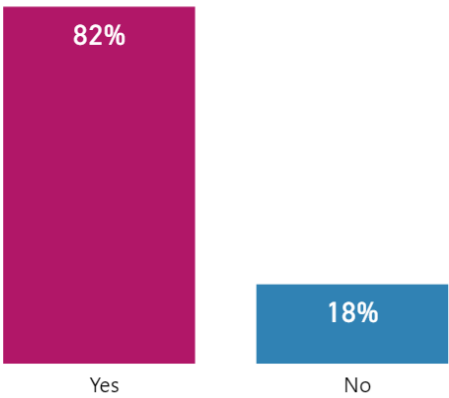


Do you have a presence on any of the following online channels?

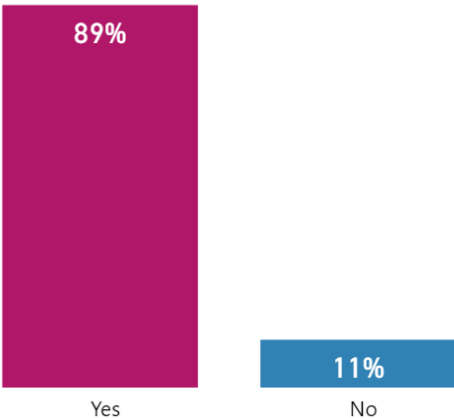
Businesses own website (with booking functionality)



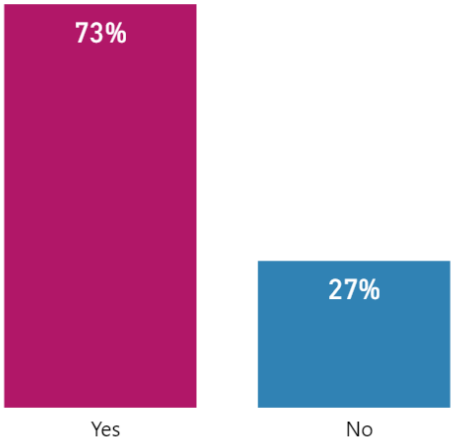
Social media



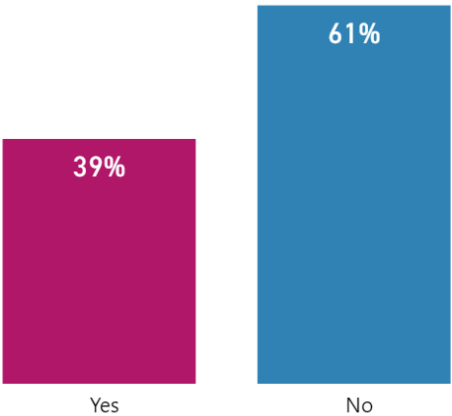
VisitScotland web listing



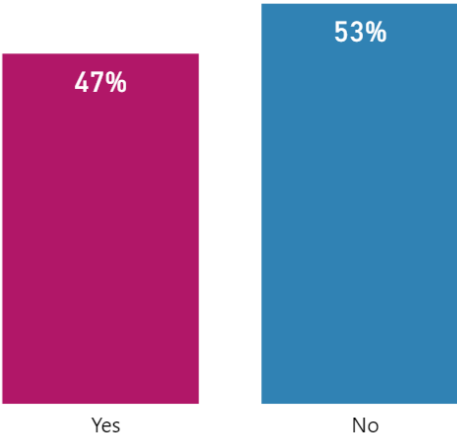
TripAdvisor



Peer-to-peer booking sites



Online travel agent





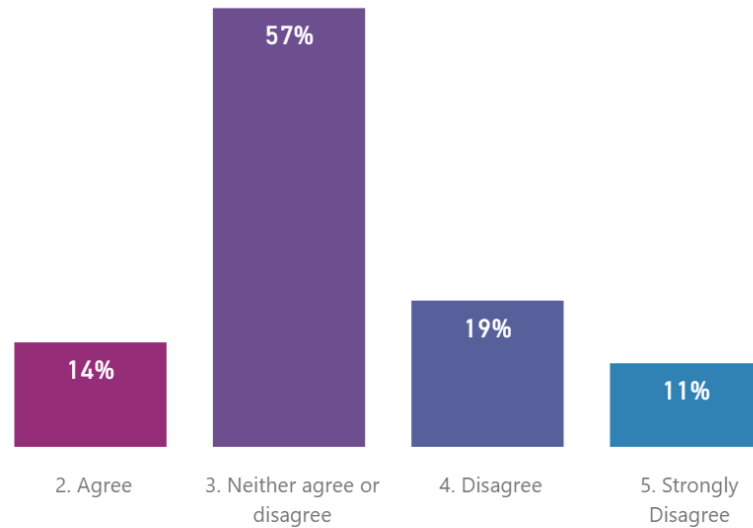
Brexit Readiness for: Angus



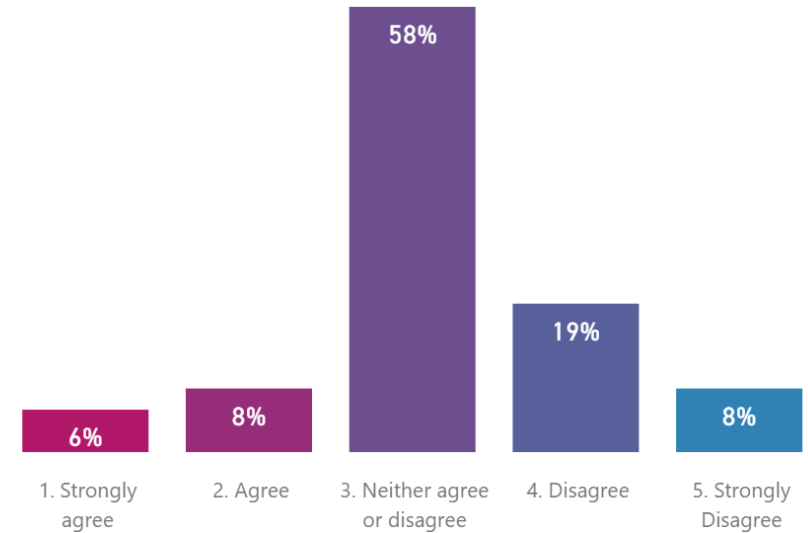
for: 2019 Q4



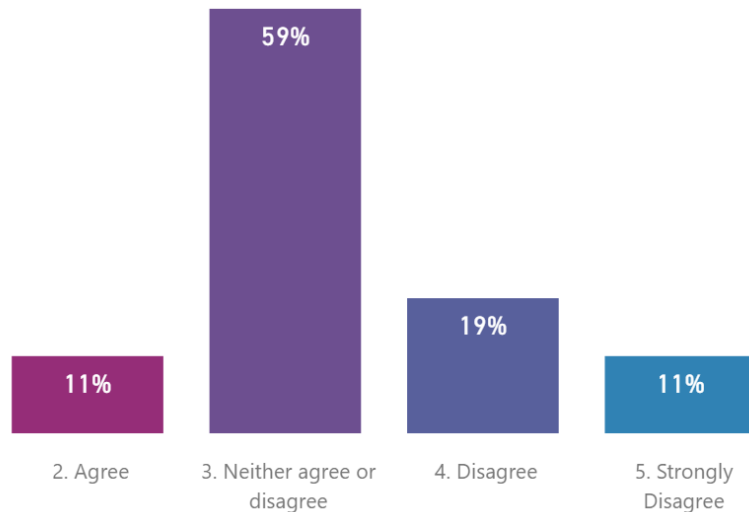
My business is planning for possible challenges related to Brexit



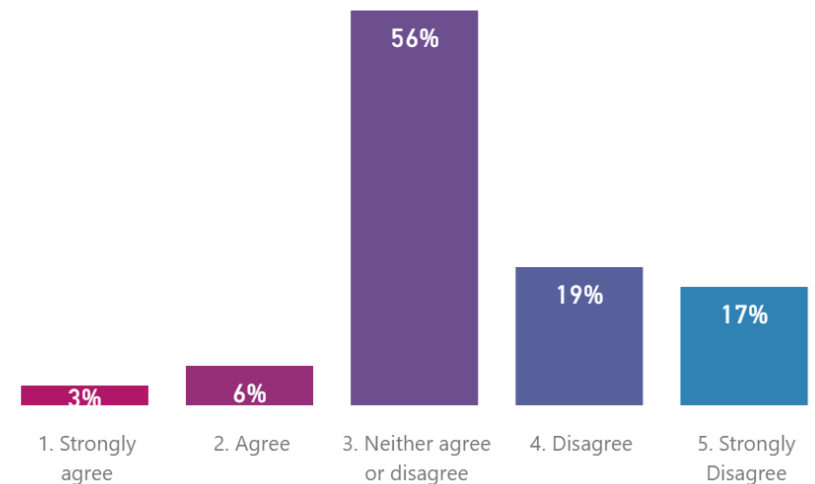
My business is prepared for Brexit



My business is planning for possible opportunities related to Brexit



My business is undertaking activity to prepare for Brexit



# Comments Summary

If you have any other comments regarding trends, challenges, or opportunities that you would like to share, please use this space.

Challenges (reported by 5 respondents):

- lack of footfall
- local tourism infrastructure and promotion not optimal
- higher input costs
- negative impact of Airbnb
- lower number of bookings due to unstable political environment

Opportunities (reported by 5 respondents):

- Angus has much to offer and the area can benefit significantly from additional investment in tourism
- need for more visitor attractions in the area to attract people
- room for innovative and alternative ideas to grow profits despite of higher input costs
- improved local communication, e.g. advising on projects or theme years well in advance (1-2 years) to enable businesses to engage better and plan relevant individual events

## Comments Summary

If you have any comments in relation to Brexit and your business, please use the space below.

3 respondents shared that they cannot plan ahead for Brexit due to present lack of information and/or uncertainty surrounding future negotiations

2 respondents did not feel concerned about Brexit, as their businesses mainly target local and long-haul international visitors

Is your business a member of the ATC (Angus Tourism Cooperative)?

Yes – 20

No-18

## Important information

Information here is provided on a voluntary basis from businesses in each local authority. We'd like to thank all those that take the time to complete the survey and provide vital information to help all those interested to understand the business conditions in their local area.

This survey collates views from businesses on a wide range of topics affecting tourism in local destinations. This data supplements data on tourism in Scotland which is gathered by the annual statistical surveys undertaken at a national level.

# THANK YOU

A huge thank you to our partners who supported, and businesses who completed the Local Tourism Industry Barometer.

In-depth results can be viewed at a regional, sub-regional and sectoral level at [visitscotland.org](https://visitscotland.org).

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