



Tourism Barometer Term 2 2006  
Fife Regional Report

*Executive Summary*



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## **DOCUMENT INFORMATION**

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## BACKGROUND AND OBJECTIVES

In Spring 2006, VisitScotland commissioned George Street Research to undertake its ongoing Tourism Barometer, a regular tracking study amongst a panel of industry-based volunteers. The survey principally aims to build upon previous industry findings uncovered in the preceding *Industry Opinion Survey* and *Business Confidence Monitor (BCM)*, with a strong emphasis on performance monitoring, assessing past and present trends within the industry, future prospects and the general market performance across Scotland. Specifically, the research aims to:

- measure changes to market performance by sector, compared with the same period in the previous year;
- identify factors influencing changes in each sector's market performance;
- establish perceived future prospects for market performance by sector;
- gauge a measure of VisitScotland's corporate reputation and;
- highlight any regional differences in respect of all the above.

VisitScotland's Area Director for Fife is working with the local Council to establish a 'business confidence monitor' for their area and the decision was taken to incorporate this into the existing Tourism Barometer, due to the similar nature of the topics to be covered. As such, a booster sample of Fife based businesses was recruited to join the panel in order to provide survey findings from a robust regional sample. Additional questions were asked of all

Fife businesses (core and booster samples) in the second term of the Tourism Barometer covering the summer season 2006.

This document summarises the key findings of the Fife survey and a copy of the questions that were asked of Fife businesses is appended.

## **METHODOLOGY AND SAMPLE**

After the first term survey of 2006, the Tourism Barometer panel included 30 Fife based businesses. An additional 71 Fife based businesses were recruited to join the panel, after excluding a number of businesses who were already assisting with the “Fife Hotel” consultancy study being carried out by RGA Consulting. The profile of the 101 Fife based businesses that completed the Term 2 survey is detailed below:

<b><u>Sector</u></b>	<b><u>No.</u></b>
<b>Accommodation</b>	<b>51</b>
- Bed & Breakfast	21
- Self Catering	16
- Hotel	11
- Other	3
<b>Attractions</b>	<b>14</b>
- Paid	7
- Free	7
<b>Activities</b>	<b>13</b>
<b>Retail</b>	<b>10</b>
- Food & Drink	6
- Other retail	4
<b>Tour Operators</b>	<b>9</b>
<b>Transport Providers</b>	<b>2</b>
<b>Entertainment/Events</b>	<b>2</b>
- Conference/Exhibitions	1
- Venues	1
<b>Total</b>	<b>101</b>

Respondents were given a choice of methods by which to complete the survey and 29 chose to complete the interview by telephone, 44 chose to complete an electronic questionnaire online and 28 opted to complete a hard copy self-completion questionnaire. The surveys were completed between 25<sup>th</sup> September and 13<sup>th</sup> October 2006.

## **EXECUTIVE SUMMARY**

**Almost half of the Fife based businesses surveyed (46%) are more optimistic about the business situation for their sector than at the start of the year** and only around one in ten (11%) are less optimistic. A larger proportion of respondents (61%) claimed to be more optimistic than at the start of the year about the situation for their own individual business and 12% were less optimistic.

**Focussing on the 2006 summer season, two thirds of respondents described the season as good in comparison to previous years; 43% said it was “very good” and 25% described it as “quite good”.** Only one in ten businesses felt this summer had been poor when compared with previous years, whilst 21% thought the season had been “average”.

**Just over one in two businesses believe their total customer numbers have increased in comparison with the same period in 2006.** Around a third record no change and less than one in ten businesses (8%) report a decrease in customer numbers compared with 2006.

**Almost two in three businesses (65%) were not affected at all by the terrorism threats this Summer.**

Encouragingly, after a strong summer season, **35% of these businesses expect the Autumn/Winter season 2006 to yield an increase in customers compared with previous years.** Only 10% foresee a decline in visitor numbers, 38% anticipate no change and around one in five are unsure.

**Almost one in two of these businesses (49%) have invested in their business in the last 12 months and the same proportion is planning to invest in the next 12 months.** In addition, 39% of businesses said they plan in increasing their businesses' spend on marketing / promotional activities in the coming year.

**Just over three in five Fife businesses currently take bookings on-line and a further 13% of businesses have positive plans to take online bookings in the next 12 months.**

In terms of VisitScotland's reputation amongst Fife businesses, **a majority of businesses who express an opinion are positive in their assessment that VisitScotland is a dynamic and forward thinking organisation, does a good job at supporting tourism in Scotland and works closely with the tourism industry.** Almost two in three (65%) agree that it is relatively easy to find out about VisitScotland's activities. One in two businesses said they had used sales or marketing opportunities from VisitScotland over recent months and just over one in three businesses claim to visit VisitScotland's industry facing website once a month or more.