

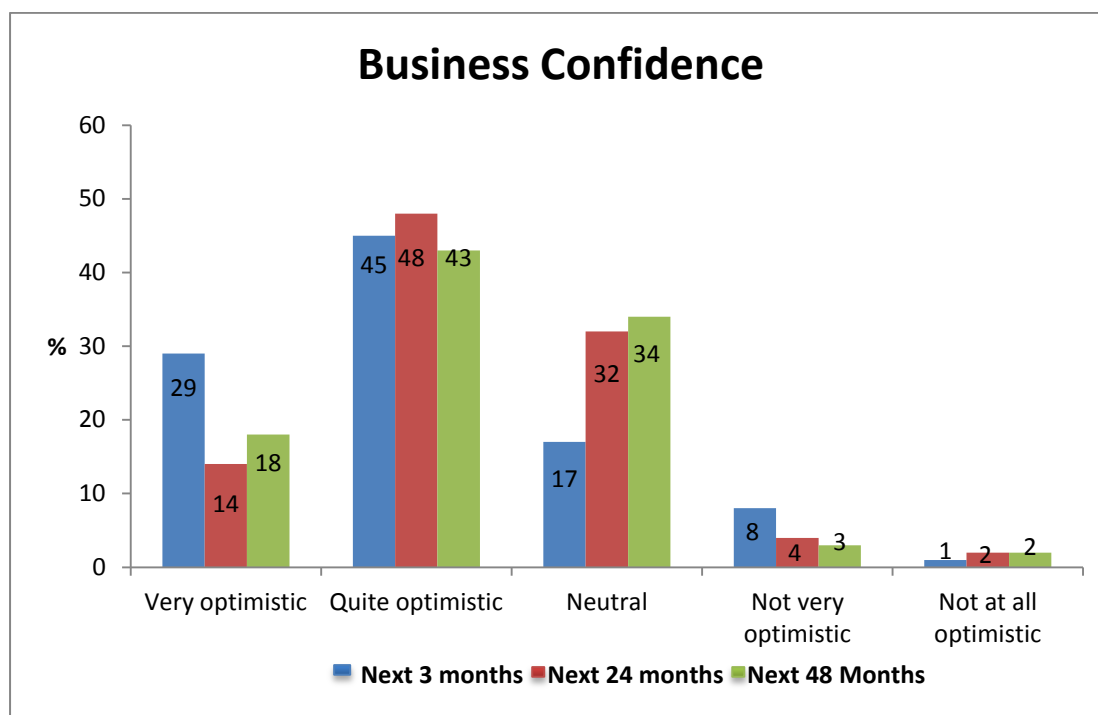
## Loch Lomond and The Trossachs National Park Business Barometer:

### January – March 2014

#### 1. Business Confidence

100 participating businesses responded to this question on Business Confidence over the next 3, 24 and 48 months:

Business Confidence	Next 3 months	Next 24 months	Next 48 months
Very optimistic	29%	14%	18%
Quite optimistic	45%	48%	43%
Neutral	17%	32%	34%
Not very optimistic	8%	4%	3%
Not at all optimistic	1%	2%	2%



## 2. Business Type

102 participating businesses responded to type of Business

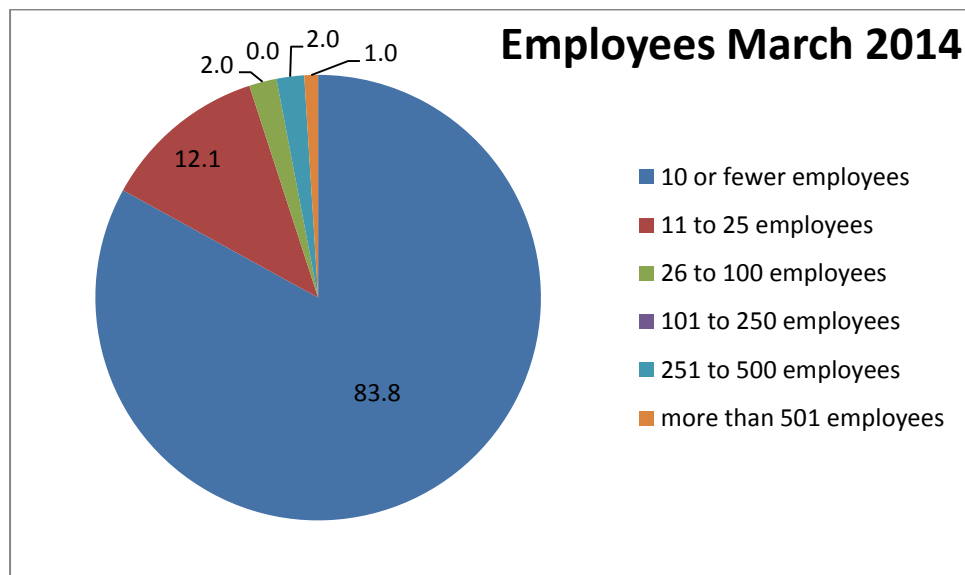
Type of Business	%
Accommodation	62.7
Catering	9.8
Transport & Tours	1.0
Visitor Attraction	2.0
Tour Operators	2.0
Entertainment Provider	1.0
Outdoor Activity Operator	5.9
Other	15.7

## 3. Employees

99 participating businesses responded to number of employees employed in first quarter of 2014.

	Average number of staff employed
March 2014	13.4
March 2013	15.2

83.8% of responding sample employs 10 or fewer employees.



#### 4. Turnover

98 participating businesses responded to the question on turnover during the first quarter of 2014.

Turnover first quarter 2014	%	Average turnover
Up	39.8	7.6%
Down	22.4	
Similar	37.8	

96 participating businesses responded to the question on expected turnover over the next 12 months.

Turnover next 12 months	%	Average expected turnover
Up	46.9	21.83%
Down	11.5	
Similar	41.7	

#### 5. Local Suppliers/Producers

60 participating business responded to the question on using local suppliers/producers in their day to day operations.

Use of local suppliers/producers	%
Yes	76.7
No	23.3

#### 6. Customers/Visitors

60 participating businesses responded to the question on comparing customer/visitor numbers in the first quarter of 2014 with numbers in the first quarter of 2013.

Customer/Visitor Numbers	%
Up	35
Down	18.3
Similar	46.7

58 participating businesses responded to the question on expected customer/visitor numbers over the next 12 months.

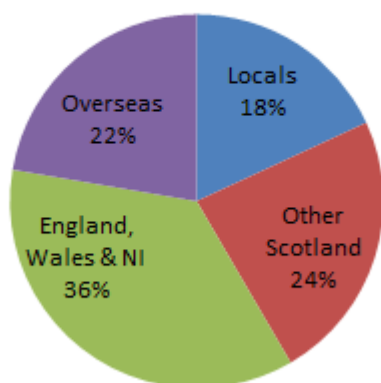
Customer/Visitor Numbers	%
Up	44.8
Down	10.3
Similar	44.8

## 7. Origin of Customers/Visitors

50 participating businesses answered the question on origin of customers/visitors in the first quarter of 2014.

Origin of Visitors	%
Locals	18.1
Other Scotland	23.5
England, Wales & NI	36.1
Overseas	22.3

### Origin Q1 2014



## 8. Customer Profile

48 participating businesses responded to the question comparing customer/visitor profile of first quarter of 2014 with first quarter of 2013.

Change in customer profile	%
Yes	10.4
No	89.6

## 9. Average Occupancy

35 responding accommodation businesses answered the question on average occupancy during the first quarter of 2014.

The average occupancy was 43.6%

34 responding accommodation businesses answered the question on expected average occupancy over the coming 12 months.

The expected average occupancy was 89.9%

## 10. Levels of Investment

43 responding businesses answered the question on levels of investment in staff training comparing the first quarter of 2014 with the first quarter of 2013

Staff Training	%
Up	16.3
Down	0.0
Similar	83.7

53 responding businesses answered the question on levels of investment in marketing comparing the first quarter of 2014 with the first quarter of 2013

Marketing	%
Up	20.8
Down	9.4
Similar	69.8

47 responding businesses answered the question on levels of investment in infrastructure the first quarter of 2014 with the first quarter of 2013

Infrastructure	%
Up	19.1
Down	10.6
Similar	70.2

## 11. Influence of LLTNP

55 responding businesses answered the question on perceived influence to four factors on being part of Loch Lomond and The Trossachs National Park during the first quarter of 2014.

Influence of LLTNP	Very Important	Quite Important	Neutral	Not Important	Not at all Important
	%				
Attracting First Time Customers	36.4	34.5	12.7	7.3	9.1
Attracting Repeat Custom	23.6	30.9	25.5	10.9	9.1
Business Turnover	9.1	29.1	38.2	12.7	10.9
Profitability	16.4	16.4	43.6	10.9	12.7

*% read horizontally and add up to 100%*

## 12. External Marketing/Financial/Business Advice

53 responding businesses answered the question on accessing external marketing/financial/business advice in the first quarter of 2014.

External advice sought	%
Yes	26.4
No	73.6

13. To follow

## 14. Weather Conditions

50 responding business answered the question on impact of weather conditions during the first quarter of 2014.

Impact of weather on business	%
Yes	40.0
No	60.0

Of those that said 'Yes' to the impact of the weather on their business, 47.8% said it had a positive effect and 52.2% said it had had a negative effect during the first quarter of 2014.

## 15. Scottish Referendum

54 responding business answered the question on impact of the Scottish Referendum on customer/visitor numbers during the first quarter of 2014.

Impact of Referendum on customer numbers	%
Up	11.1
Down	46.3
n/a	42.6

52 responding business answered the question on impact of the Scottish Referendum on business activities (excluding customer/visitor numbers) during the first quarter of 2014.

Impact of Referendum on business activities	%
Up	9.6
Down	44.2
n/a	46.2

## 16. Homecoming 2014 Impact

56 responding business answered the question on whether Homecoming Scotland 2014 had had any impact on business during the first quarter of 2014.

Impact of Homecoming 2014	%
Yes	10.7
No	75.0
n/a	14.3

## 17. Product Innovation

54 responding businesses answered the question on introducing new products/services/activities in the first quarter of 2014.

Product Innovation	%
Yes	31.5
No	68.5