

Perthshire Tourism Industry Barometer – Serviced Accommodation Report

Welcome to the Perthshire Tourism Industry Barometer.

The industry barometer is a means by which business performance and trends in the Perthshire area can be captured. By investing 10-15 minutes of your time every three months completing this online survey, your business' performance and your thoughts are anonymously recorded and combined with those of your peers. This then provides a snapshot of how tourism in the Perthshire area is doing now and could be doing in the future.

These findings are then shared with those who contributed. The more businesses that participate, the better the findings, the more informed we can all be.

Thank you for your contribution.

Where is your business based (please tick all that apply to your business)?

16.7%	Aberfeldy & Kenmore	0.0%	Dunkeld & Birnam
0.0%	Auchterarder	0.0%	Glenshee
0.0%	Blair Atholl, Killiecrankie & surrounding area	0.0%	Kinloch Rannoch & Tummel Bridge
0.0%	Blairgowrie, Alyth, and East Perthshire	0.0%	Loch Leven & Kinrosshire area
0.0%	Breadalbane area	11.1%	Perth City
0.0%	Carse of Gowrie	44.4%	Pitlochry
27.8%	Crieff, Comrie & Strathearn area		

Serviced Accommodation providers only - what was your average room occupancy for this quarter (%)?

12.5%	0-10%	12.5%	51-60%
0.0%	11-20%	12.5%	61-70%
18.8%	21-30%	6.3%	71-80%
0.0%	31-40%	12.5%	81-90%
25.0%	41-50%	0.0%	91-100%

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

	None	1-4	5-9	10-14	15-19	20-24	25-29	30-34	35-49	50+
Full-time	25.0%	56.3%	6.3%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	6.3%
Part-time	23.1%	53.8%	7.7%	0.0%	0.0%	0.0%	7.7%	0.0%	0.0%	7.7%

How does this compare to the same quarter last year?

	More than last year	Less than last year	Same as last year
Full-time	6.7%	13.3%	80.0%
Part-time	7.7%	23.1%	69.2%

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

- 22.2% Up
- 16.7% Down
- 44.4% Similar
- 16.7% Business closed

What was the percentage increase in your turnover?

- 25.0% 0-5%
- 25.0% 6-10%
- 25.0% 11-15%
- 25.0% 16-20%
- 0.0% Above 20%
- 0.0% N/A

What was the percentage decrease in your turnover?

- 33.3% 0-5%
- 0.0% 6-10%
- 0.0% 11-15%
- 33.3% 16-20%
- 33.3% Above 20%
- 0.0% N/A

Have you accessed any external marketing, financial or business advice in this quarter?

- 22.2% Yes
- 77.8% No

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

- 16.7% Up
- 22.2% Down
- 44.4% Similar
- 16.7% Business closed

What was the percentage increase in your customer/visitor/guest numbers?

- 0.0% 0-5%
- 0.0% 6-10%
- 66.7% 11-15%
- 33.3% 16-20%
- 0.0% Above 20%
- 0.0% N/A

What was the percentage decrease in your customer/visitor/guest numbers?

- 50.0% 0-5%
- 0.0% 6-10%
- 0.0% 11-15%
- 25.0% 16-20%
- 25.0% Above 20%
- 0.0% N/A

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

- 50.0% Yes
- 50.0% No

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

- 44.4% Next 12 months
- 22.2% Between 12 and 18 months
- 11.1% Between 18 months and 2 years
- 22.2% Over 2 years
- 0.0% Don't know

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

- 16.7% Yes
- 83.3% No

If yes, please indicate how much of a percentage change this has been, against the same period last year:

- 0.0% A large increase - over 15%
- 0.0% A small increase - up to 15%
- 0.0% No change
- 66.7% A small decrease - up to 15%
- 33.3% A large decrease - over 15%
- 0.0% Not applicable

Has there been any difference in who your customers / visitors have been this Spring season compared to Spring last year? Please tick as appropriate:

	More of these	Same/similar numbers	Less of these	Don't know	N/A
People from your local area	6.3%	43.8%	18.8%	6.3%	25.0%
People from elsewhere in Scotland	31.3%	37.5%	12.5%	6.3%	12.5%
Rest of UK (England/Wales/NI)	0.0%	43.8%	37.5%	6.3%	12.5%
Overseas	41.2%	17.6%	17.6%	5.9%	17.6%

If you have any more details of the origin of your visitors from outside the UK, please could you indicate if there have been any differences this Spring compared to last. If not, please click on Next to skip to the next question.

	More of these	Same/similar numbers	Less of these	Don't know	N/A
From Irish Republic	9.1%	27.3%	9.1%	27.3%	27.3%
From Northern Europe (French, German, Dutch, Scandinavian etc)	28.6%	42.9%	7.1%	7.1%	14.3%
From Southern Europe (Spanish, Italian etc)	20.0%	30.0%	20.0%	10.0%	20.0%
From Eastern Europe (Poland, Czech Rep etc)	0.0%	30.0%	20.0%	20.0%	30.0%
From North America (US / Canada)	27.3%	27.3%	18.2%	9.1%	18.2%
From Australia, New Zealand, South Africa	9.1%	27.3%	27.3%	18.2%	18.2%
From the emerging markets - including Russia, China, India, South America	20.0%	10.0%	10.0%	20.0%	40.0%

Please indicate how confident you feel about the performance of your business over the following periods:

	Very optimistic	Quite optimistic	Neutral	Not very optimistic	Not at all optimistic
Next 3 months	35.3%	47.1%	17.6%	0.0%	0.0%
Next 12 months	27.8%	44.4%	22.2%	5.6%	0.0%
Next 24 months	23.5%	23.5%	47.1%	5.9%	0.0%

We appreciate the time you have taken to complete this short questionnaire. Please click on SUBMIT only once. It may take a few moments to process your information but extra clicks will result in duplicate replies. When your reply has been processed, you will be directed to VisitScotland's corporate website - www.visitscotland.org. Thank you for your help.