STRATEGIC
MARKETING

Fáilte Ireland
National Tourism Development Authority

Tourism Barometer

September 2012

Contents **Page**

1. Headline Findings

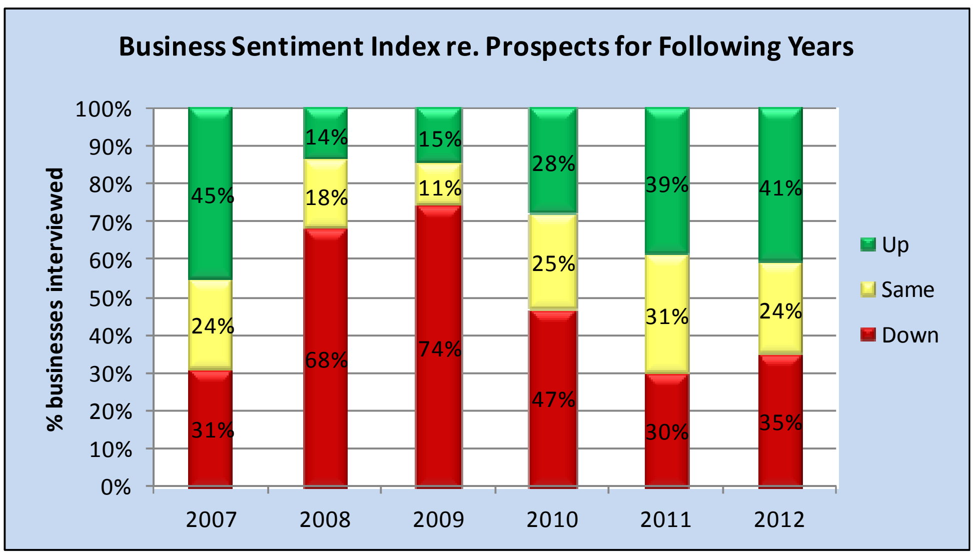
Background to the Tourism Barometer

The Fáilte Ireland Tourism Barometer is a survey of tourism businesses designed to provide insight into tourism performance for the year to date and prospects for the remainder of the year.

We received 751 responses to an online survey with tourism businesses between 30th August and 2nd October 2012 and conducted 90 top-up telephone interviews. We also conducted eight depth interviews with senior industry executives. More details on the methodology can be viewed in appendix 1.

Confidence Index

1.1 Business confidence has now almost returned to heights last seen in 2007. About two in five (41%) respondents to the survey in the paid serviced accommodation (PSA) sector expect overall business levels in 2012 to be up on last year, with about a third (35%) anticipating declines.



Base: Accommodation Providers *(weighted to available rooms)*

Strong visitor numbers in 2012 for paid serviced accommodation

1.2 Just over half (52%) of respondents[1] in the paid serviced accommodation sector report an increase in visitor volumes to date in 2012 compared to the same period last year. Just over one quarter (27%) report a decrease.

1.3 This positive result is mostly due to the strong performance in terms of visitor numbers of the hotel sector and a reasonable performance among guesthouses. Over half (57%) of hotels and about two in five (38%) guesthouses report increased visitors; but this compares to a minority (20%) of B&Bs reporting increased visitors.

Encouraging improvement in hotels' average room yields

1.4 Over two in five (43%) hotels report an increased average room yield in 2012, compared to a lower proportion (29%) reporting a decrease. This is an encouraging change from the April barometer, when 45% were reporting a decrease.

A continued good year for attractions

1.5 Attractions have continued to enjoy a fairly positive year. Nearly half (46%) have increased their visitor numbers to date compared to this time last year and about a fifth (19%) have achieved the same level.

1.6 'Irish people holidaying in Ireland' is a key reason for success in this sector compared to most other sectors, with over half (53%) of attractions stating this as a positive factor.

Good domestic market for paid serviced accommodation

1.7 Slightly under half (45%) of paid serviced accommodation respondents report increased domestic visitor levels year to date.

1.8 As with the overall figures however, results vary greatly by sector. About half (51%) of hotels have increased their domestic visitor numbers year to date, but the majority (59%) of B&Bs have experienced a decrease.

Overseas visitor volumes very positive for paid serviced accommodation

1.9 Nearly half (45%) of respondents in the paid serviced accommodation sector have experienced increased overseas visitors to date in 2012, compared to a much lower proportion (28%) reporting a decrease.

1.10 This is much more positive than in the April barometer, when just a third (32%) reported increased overseas volumes.

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[1] weighted by available bedrooms in the sector

Olympics – little effect on the whole

1.11 Most (82%) respondents say that the London 2012 Olympics had no effect on their business. Some (13%) say it had a negative effect. Whilst some operators received additional visitors from other continents, others experienced a noticeable decline in visitors from Britain and mainland Europe during the peak summer season.

Cautious outlook for the remainder of 2012

1.12 Seven of the eight sectors interviewed expect visitor volumes to be down on 2011 for the remainder of 2012. Just the hotel sector expects to be up, and the reliance here is on the domestic market.

Seasonal staffing up in hotels in 2012

1.13 Squeezed profit margins have taken their toll on the industry's staffing levels this year. However, the hotel sector did see as a slight increase in seasonal staffing, with one third (34%) of businesses taking on more seasonal staff this summer and about half (47%) employing the same level.

Repeat visitors and marketing have been key in 2012

1.14 About two in three (65%) respondents say that repeat visitors are a positive factor affecting their business in 2012. About half (51%) cite 'own marketing' as a positive factor.

Fuel & energy costs and the economy – the most common concerns

1.15 Seven in ten (70%) respondents refer to 'fuel and energy' costs as an issue of concern in 2012, although this is a decrease from 80% in April. This is followed by 'state of the global economy' (67%), although there are some positive signs of upturn from the American market in particular.

1.16 The weather has blighted the summer season for many operators, especially in the caravan & camping sector, where nearly all (95%) respondents have stated this as a concern this year.

1.17 Low-priced competition is still an issue in the PSA sector. However the proportion (62%) stating this as a concern has fallen from 77% in April.

2. Qualitative Findings

We have conducted eight depth interviews with industry leaders (see appendix 1, para. 12.11 for more details). The main findings from these interviews are discussed below.

Promising signs of recovery in 2012

2.1 There are promising signs of the tourism industry recovering in 2012, especially in the tourism hotspots. A number of different sectors report that 2012 is the best year since before the onset of the recession. However, growth is slow, and there is still much caution in the tourism industry as businesses gradually find their feet again.

“Incoming tour operator members are up 6.6% year to date”

“The first 6 months were very difficult for B&B members. Then July and August picked up, and September was exceptionally good – the best for many years”

“Dublin has seen a very good recovery for hotels. Occupancy has increased”

“Lots of coach operators are reporting they have been very busy this year”

Restaurants and caravan & camping – two significant exceptions

2.2 For two sectors however, 2012 has been an extremely difficult year so far. In the restaurant sector, there is still no sign of turning the corner. The numbers of people going into restaurants are unchanged, but they are spending less. Alcohol sales are down, and diners are choosing two courses rather than three, or one course rather than two.

“Restaurants are surviving day to day. Staffing numbers are greatly affected”

2.3 The caravan & camping sector has been hit badly by the weather this summer. This affected the domestic market in particular, and businesses in the south.

US market is performing well

2.4 The US market has shown promising signs of recovery this year. The exchange rate is working in favour of the dollar, and American visitors appear to have stayed for longer than normal in Ireland. The Notre Dame vs Navy match at the beginning of September gave tourism a welcome boost.

“Americans are high spenders. They’ve been staying longer than normal, playing golf and going fishing”

“We have experienced strong inbound traffic flows amongst US business travellers…”

European markets fairly stable

2.5 Key European markets such as France and Germany have been fairly steady in 2012.

"Continental European markets performed broadly in line with 2011"

Winning back the British is a key concern going forwards

2.6 The British market has been depressed for some time now, and the industry is very keen to see British people returning. The country has financial problems of its own, and aggressive marketing by British tourist boards has been keeping the British from travelling abroad.

The Gathering is key for next year

2.7 2013 is the year of 'The Gathering' in Ireland, and the industry has strong expectations of how it will impact on tourism from overseas.

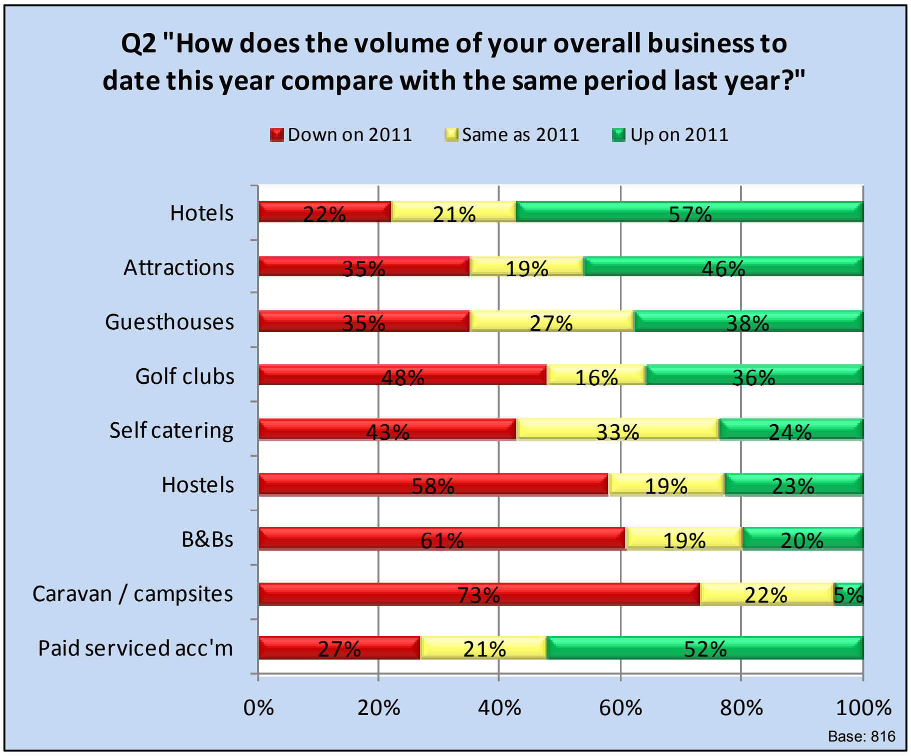
"It's all hands on deck for The Gathering"

Much activity in Dublin over the next two years

2.8 Ireland will host the EU Presidency for the first six months of 2013. This will bring significant conferences and events to Dublin. 2014 is also looking good for bookings into the CCD, and the hotel industry in Dublin is expected to benefit from that too.

3. Visitor Volumes in 2012

Overall visitor volumes in 2012



In all charts, 'don't know' or 'not applicable' answers to the question have been excluded and the percentages re-based. Results are split by sector and ordered by proportion answering an increase in numbers (shown in green).

In addition to the individual sector results, the last bar on each chart shows weighted results for the paid serviced accommodation sector; these figures have been derived from the hotel, guesthouse and B&B results, with weightings applied in accordance with each sector's share of total bedrooms within paid serviced accommodation.

Encouraging performance in some sectors

3.1 Just over half (52%) of businesses in weighted paid serviced accommodation report that visitors are up on last year. However the difference in performance between the hotel sector and the B&B sector is substantial.

3.2 Of the hotels which are up, most (79%) give 'own marketing' as a positive factor affecting their business.

"Added value packages within the hotel sector in general are working well for both Irish and overseas visitors"
Hotel

3.3 Attractions are also enjoying a good year, largely as a result of domestic visitors and own marketing activity. In the case of indoor attractions, the bad weather has actually helped.

"Gold Tickets Offer [is a] three year project to increase visitors, it's a really good scheme. A marketing intern has done a really great marketing of the attraction and using social media is really helping"
Attraction

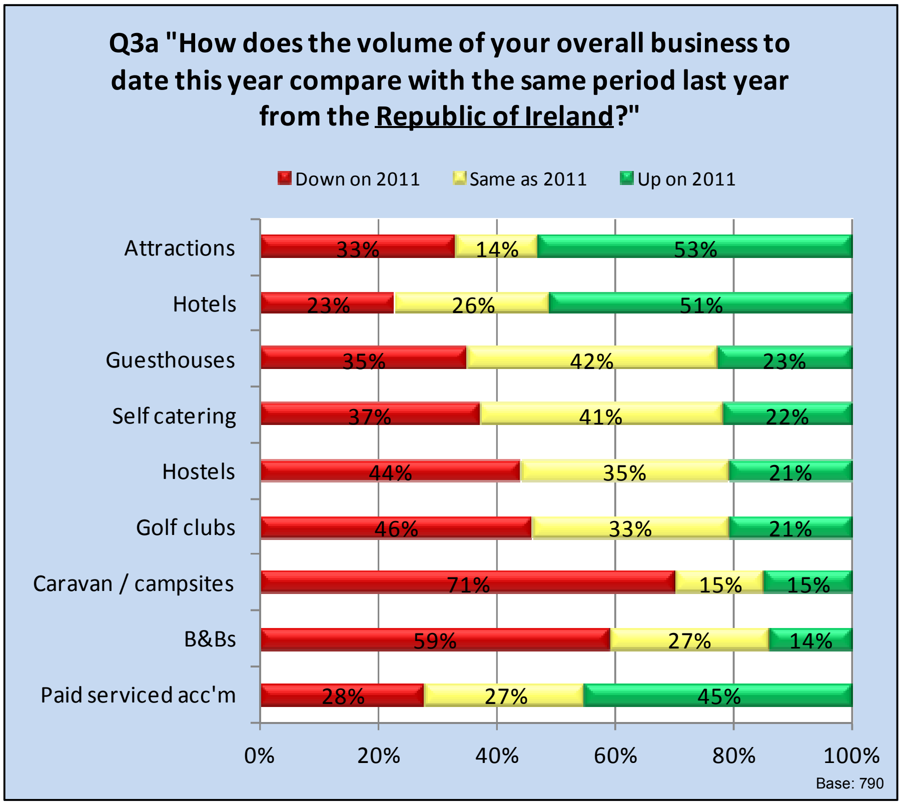
"The wet weather helped our business because we are an indoor facility"
Attraction

Bad weather has blighted the year for many operators

3.4 Unfortunately the summer of 2012 has not been kind to the industry. Some very weather-dependent sectors, most notably caravan & camping, golf clubs and outdoor attractions have been hit hard by the weather.

"Because we are an outdoor attraction with no shelter, the weather has impacted the business greatly"
Attraction

Domestic visitors

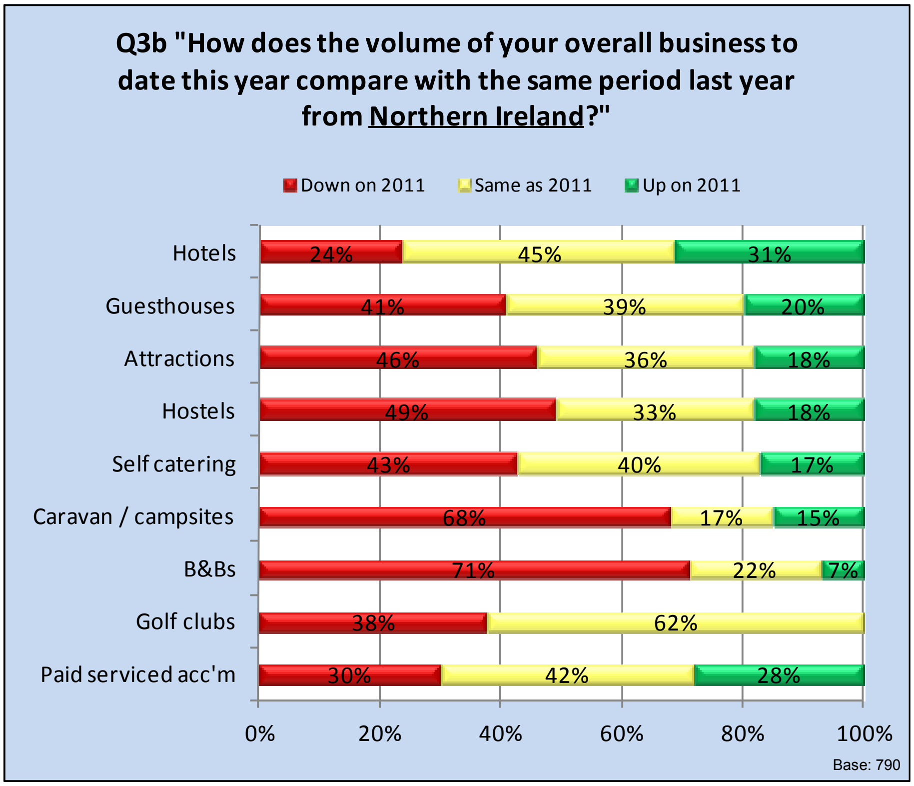


Domestic market by sector – similar picture to the overall market

3.5 The domestic visitor volumes by sector reflect the overall volumes by sector, with hotels and attractions enjoying a good year, whilst the majority of B&Bs and caravan & camping report decreased volumes.

"Greater awareness through TV/media of what is available to do in Ireland"
Attraction

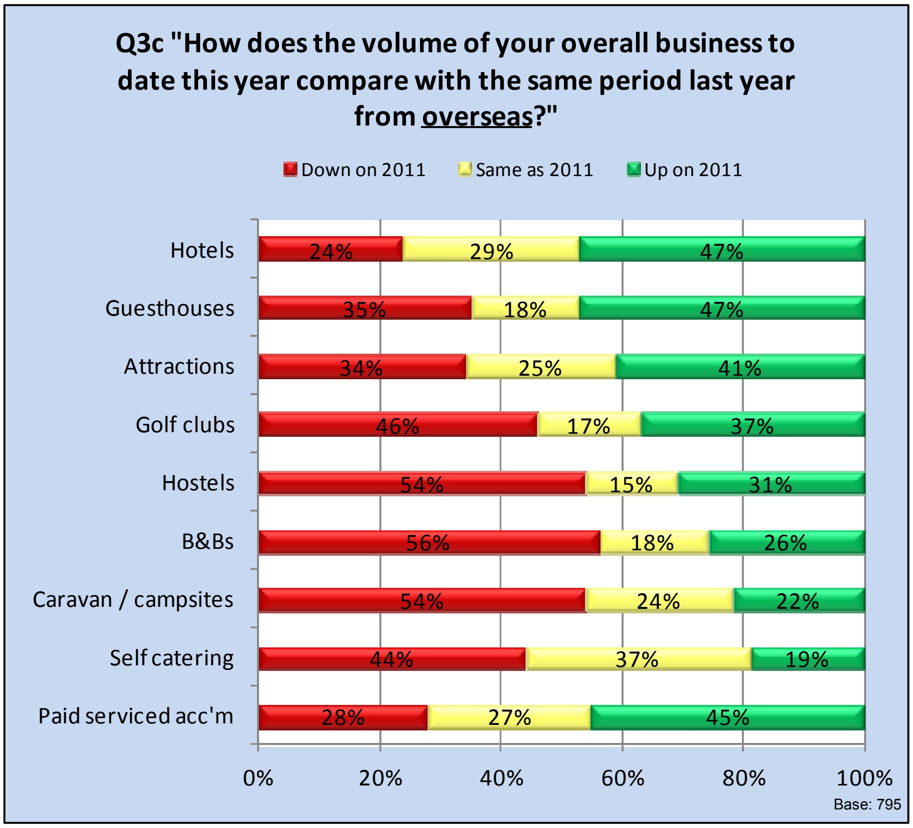
Visitors from Northern Ireland



Some recovery in hotel sector for Northern Ireland

3.6 Whilst most sectors continue to see large decreases in visitors from Northern Ireland, the hotel sector has seen some recovery this summer.

Overseas visitors

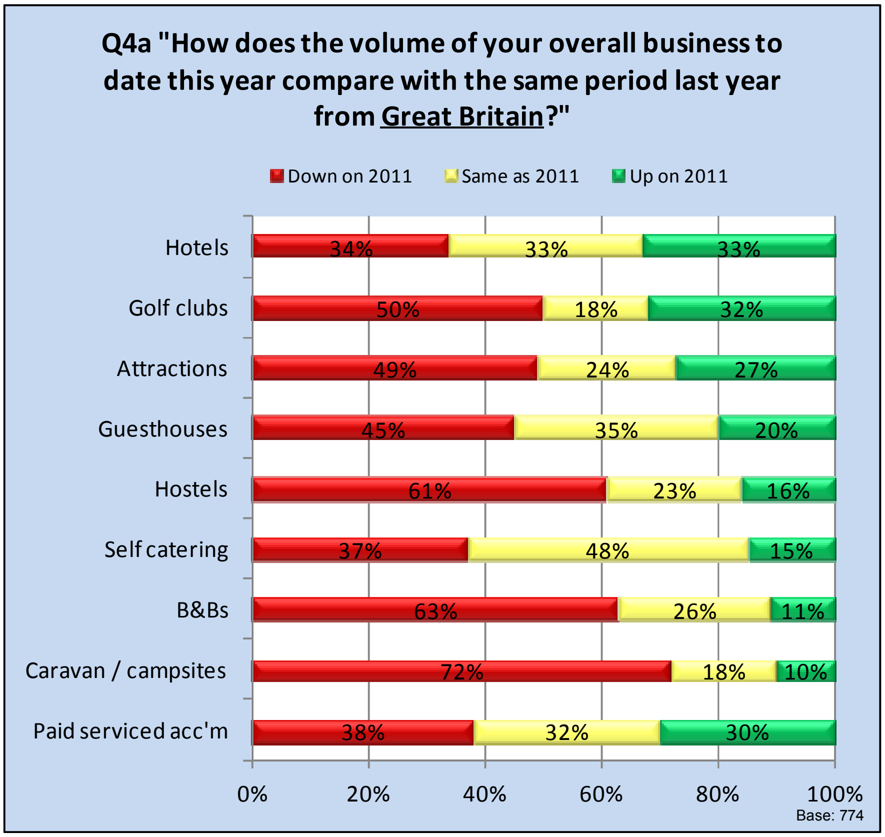


Improved performance from overseas markets this summer

3.7 Nearly half (45%) of respondents in the paid serviced accommodation sector have experienced increased overseas visitors to date in 2012. This is a marked improvement from the April barometer, when a much lower proportion (32%) reported an increase.

Visitors from Great Britain

Charts now show the overseas visitor volumes by key individual markets, starting with Great Britain below.



British market has not recovered yet

3.8 The British market has been down for some time, and earlier hopes that it would recover this summer have not been fulfilled.

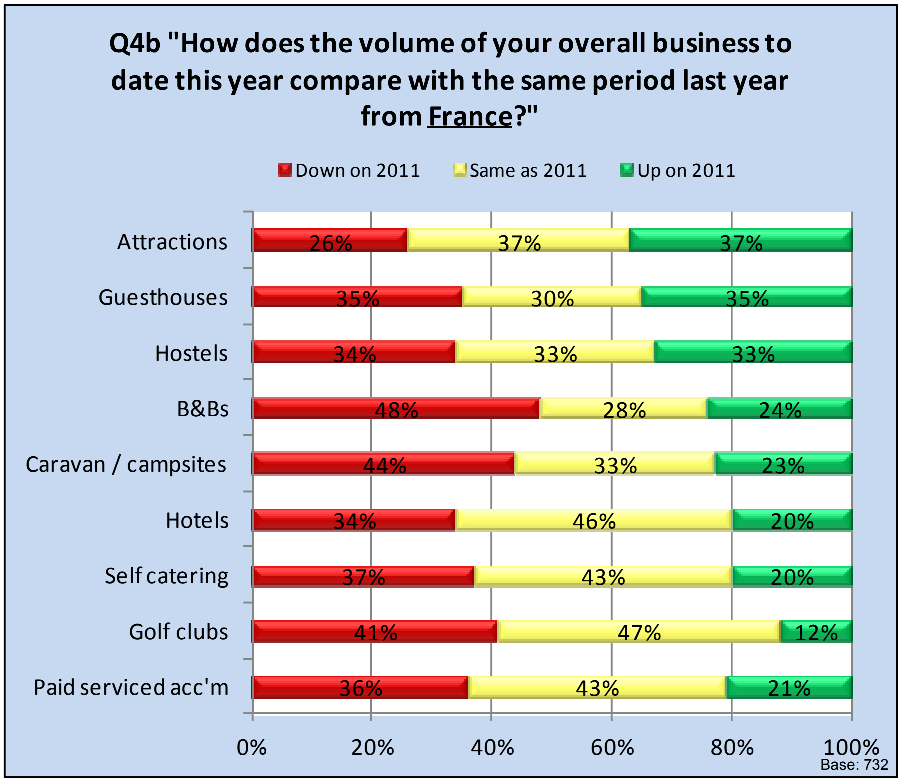
3.9 The pound has been strong against the euro, but this has not done enough to entice British visitors back to Ireland.

"Very few young English people about"
Caravan park

"Fewer British people coming to Ireland"
B&B

"The English visitors have probably halved in the last five years"
Hostel

Visitors from France



French market slightly down this year

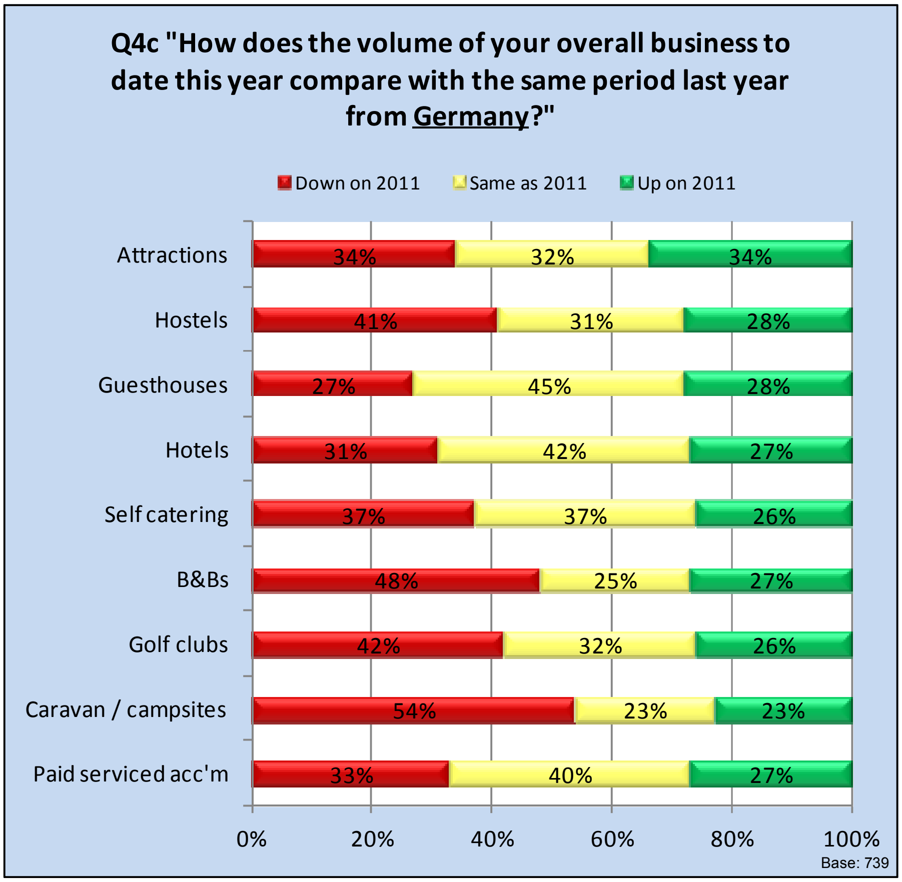
3.10 The French market is down slightly overall this year, although guesthouses and hostels have seen some stability.

"Direct flights from France, Germany and Italy into Cork have had a positive impact"
Guesthouse

"For some reason, it's been the year of the French. We've seen an exceptional number of French people visiting, but don't know why"
Hostel

"We seemed to have a lot of French in July"
Hostel

Visitors from Germany



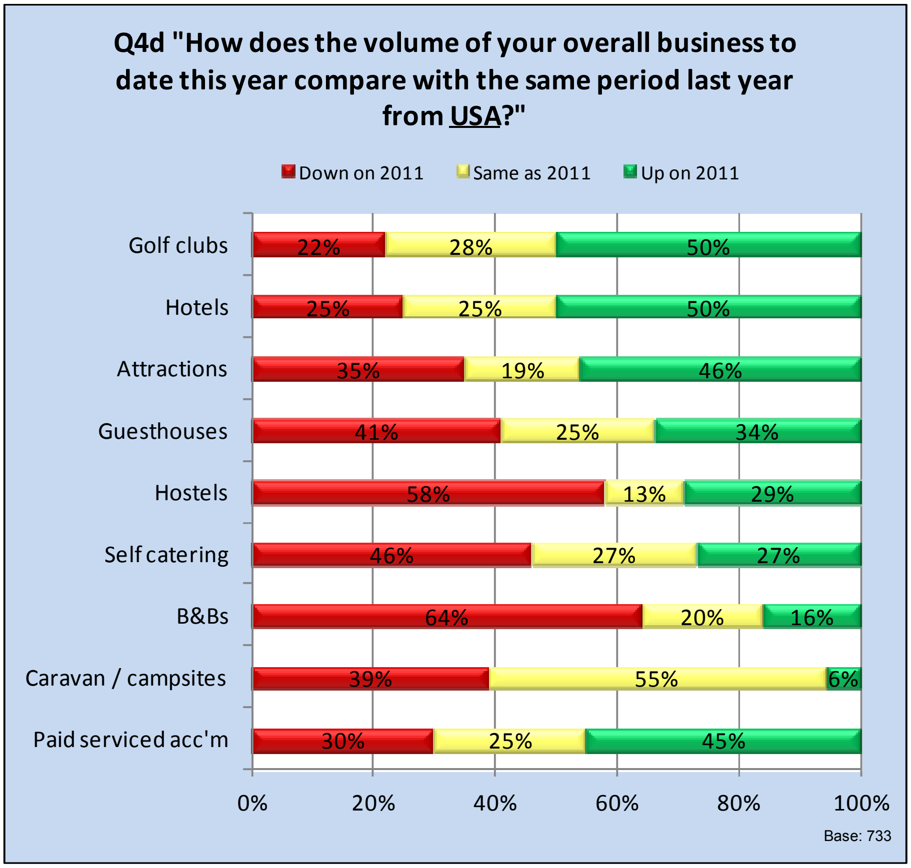
Some stability in the German market

3.11 Some sectors (hotels, guesthouses, attractions) have seen stability in the German market, whereas other sectors continue to see a decline. Improved air access and overseas marketing by Tourism Ireland have been mentioned as positive factors by operators seeing increased business from Germany.

"This year the amount of German visitors has gone up 65% in our business. The Germans, followed by Austrian and Swiss (predominantly German speaking) are now our biggest market. I do think this has to do with the work Tourism Ireland are doing in that market"
Guesthouse

"Improved flights from Germany to Knock"
Attraction

Visitors from USA



Good year for the American market

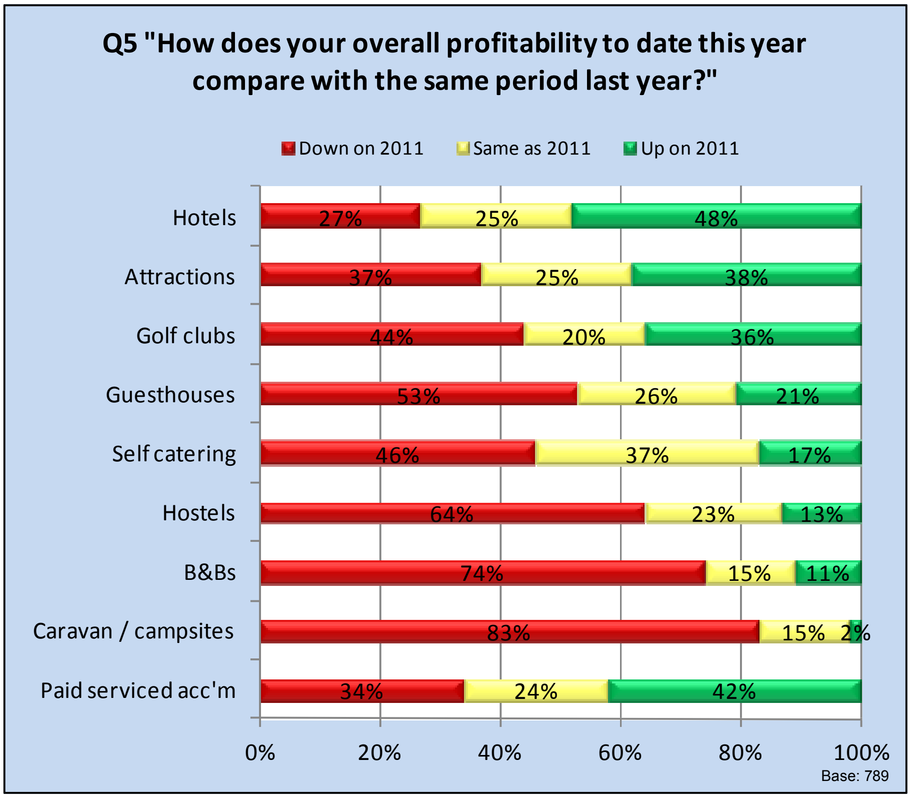
3.12 Hotels, attractions and golf clubs have enjoyed an excellent summer from the American market. Some operators in the industry say that election years are normally bad for tourism from America, but this has proved not to be the case in 2012.

3.13 The Notre Dame vs Navy match and the dollar-euro exchange rate are thought to be factors.

"We've seen a lot of Americans, which is unusual as they don't normally travel in an election year, but we've seen an increase since the football in Dublin"
Hostel

"The improvement in exchange rate for American visitors has had a very significant impact on the number of US visitors"
Golf club

4. Profitability

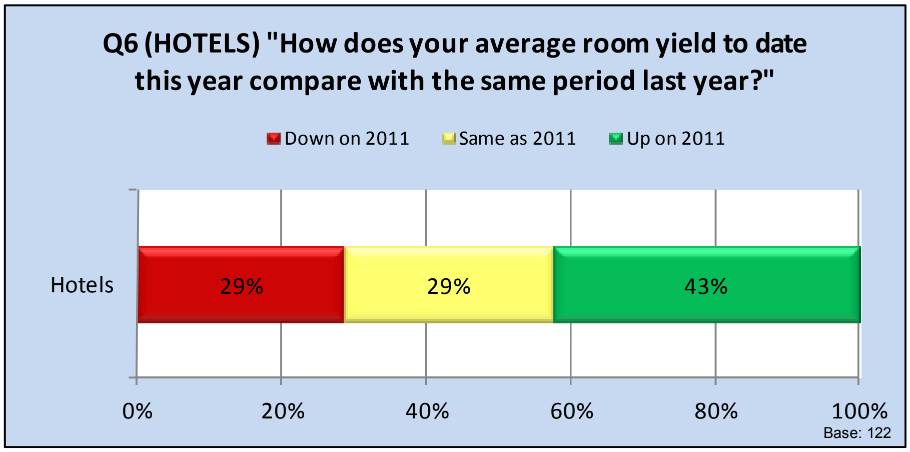


Profit margins returning to hotels but not smaller businesses

4.1 The hotel sector has seen an improvement in profitability, with about half (48%) being more profitable than in 2011, compared to a lower proportion (37%) in the April barometer.

4.2 However, there is no change in fortune for the smaller serviced accommodation businesses that have to compete with hotels now that room rates have come down.

5. Average Room Yield

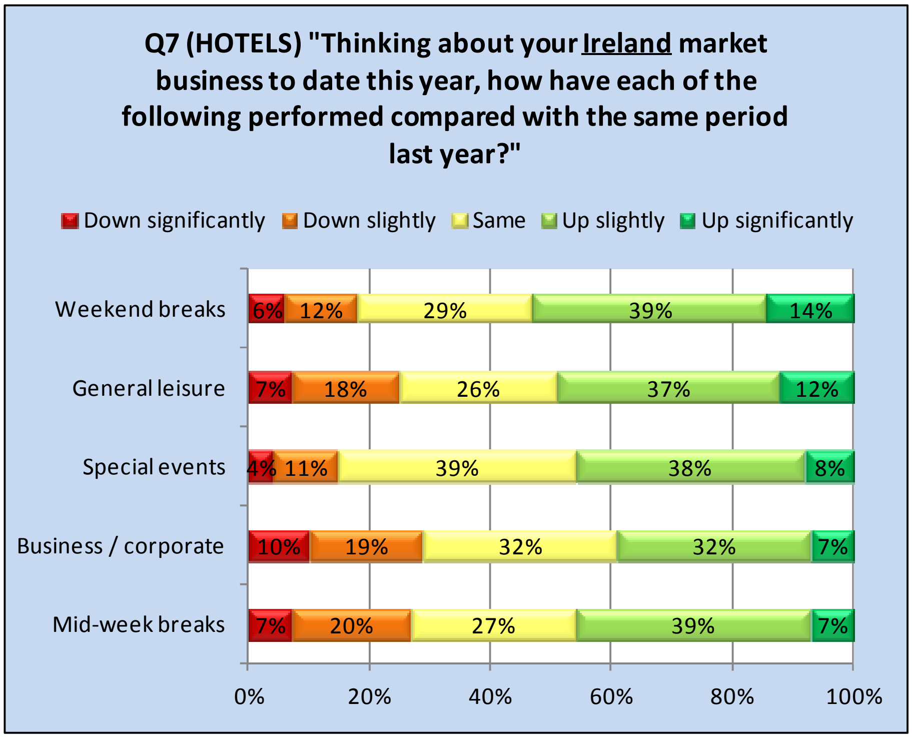


The above question has only been asked of hotel operators

Profit margins seem to be returning for hotels

5.1 Average room yields are up significantly in the hotel sector. The proportion reporting an increase in yield (43%) does not match the proportion reporting increased visitor volumes (52%), but nevertheless, the sector is at least benefiting now from increased income, which was not the case in the April barometer.

6. Types of Booking – Hotels (Ireland Market)

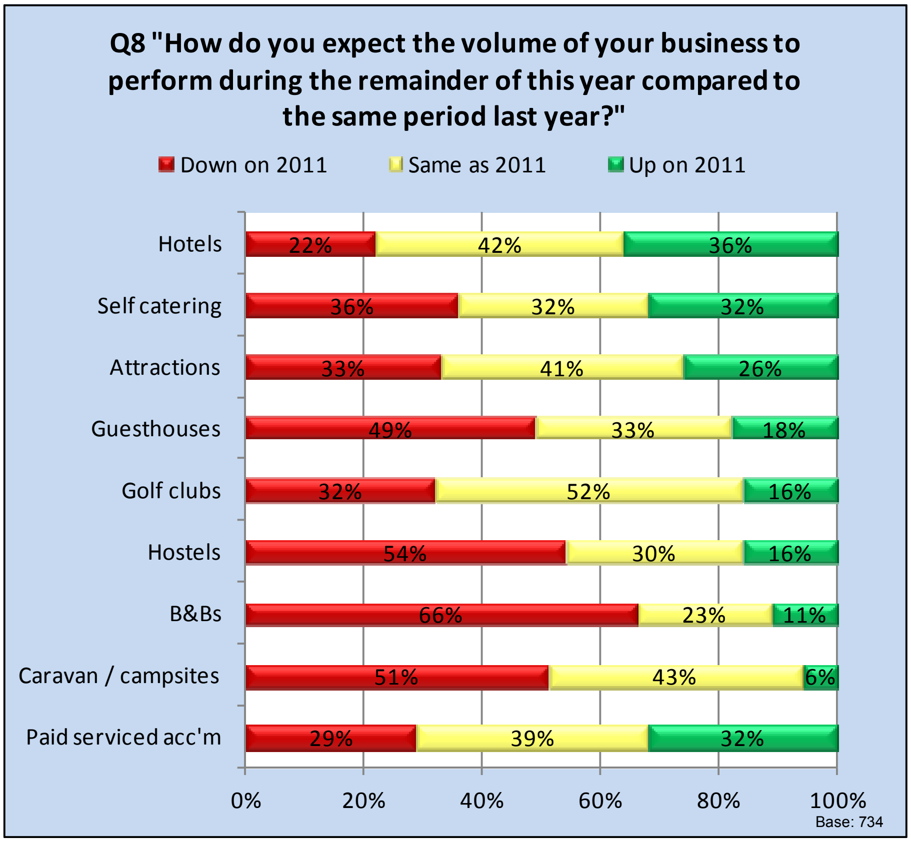


All types of booking are up for hotels

6.1 2012 is turning out to be a better year for hotels, with improved visitor volumes and profit margins returning. The success is spread across all segments of the domestic market, even business / corporate, which had been down for a long time.

7. Expectations for the Remainder of 2012

Overall expectations



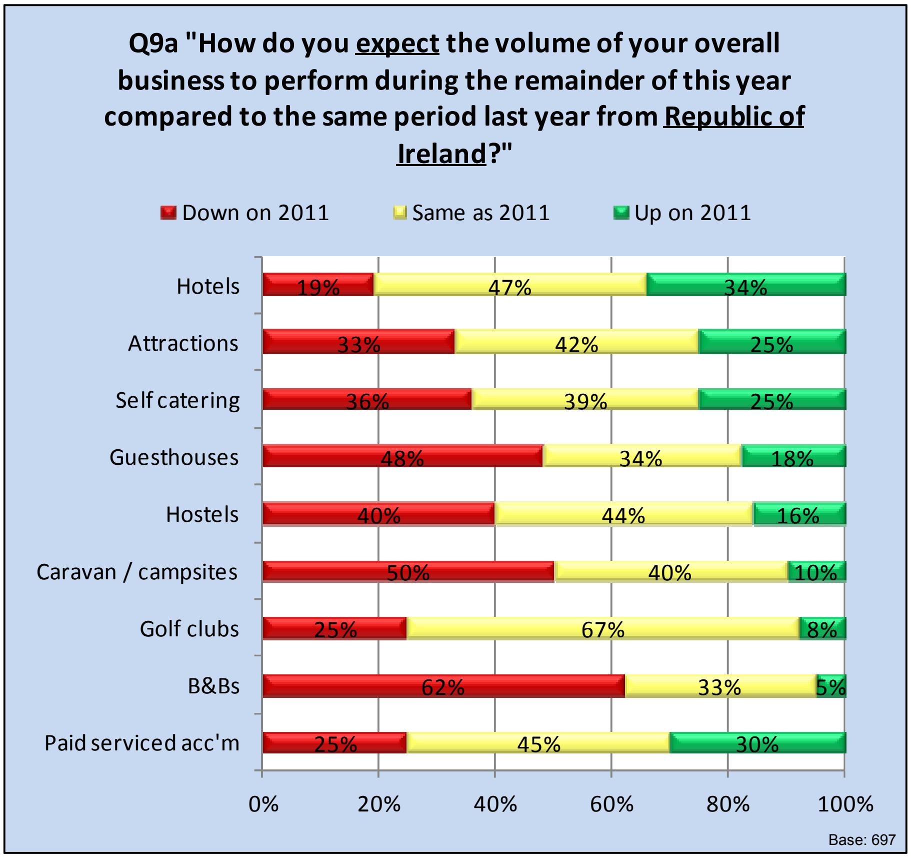
Expectations can be quite seasonal

7.1 In giving expectations for the coming period, tourism operators tend to be less positive when approaching autumn/winter compared to when they have the summer to look forward to (even though the question asks them to compare like for like in terms of time of year).

7.2 Not much is expected from the remainder of the year, except in the hotel sector, which has enjoyed a relatively good year to date.

7.3 Some operators are now waiting anxiously to hear what the December Budget will reveal. The Budget is likely to have a significant impact on expectations for 2013.

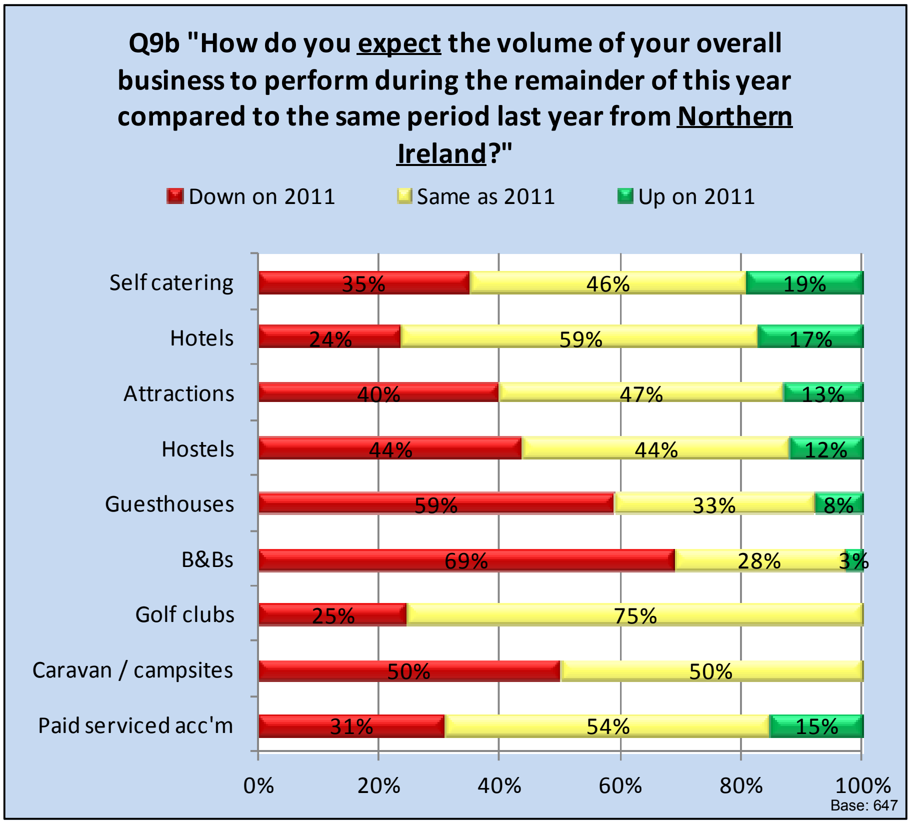
Domestic expectations



Domestic market reflects the overall market

7.4 The outlook for the domestic market reflects the expectations for the overall market, with hotels remaining positive but all other sectors expecting to be down for the remainder of the year.

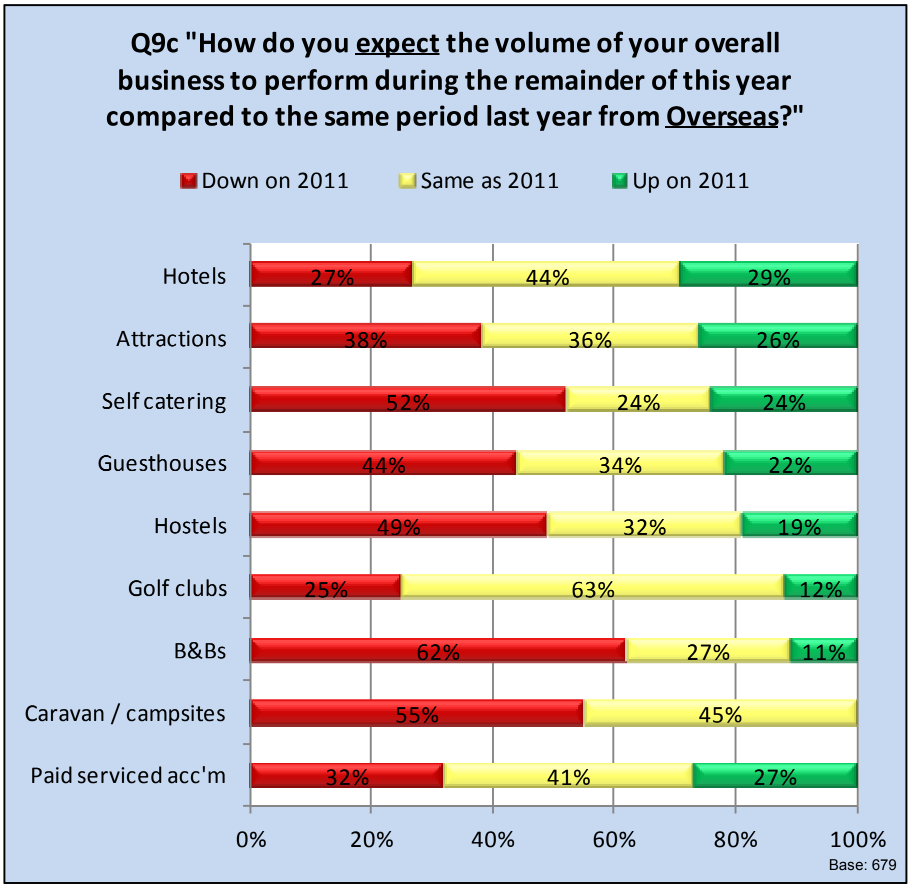
Northern Ireland expectations



Northern Ireland expected to remain down

7.5 Expectations for the Northern Ireland market are low for the remainder of the year. This market has been down for some time.

Expectations from overseas



Expectations for overseas markets also reflect the overall outlook

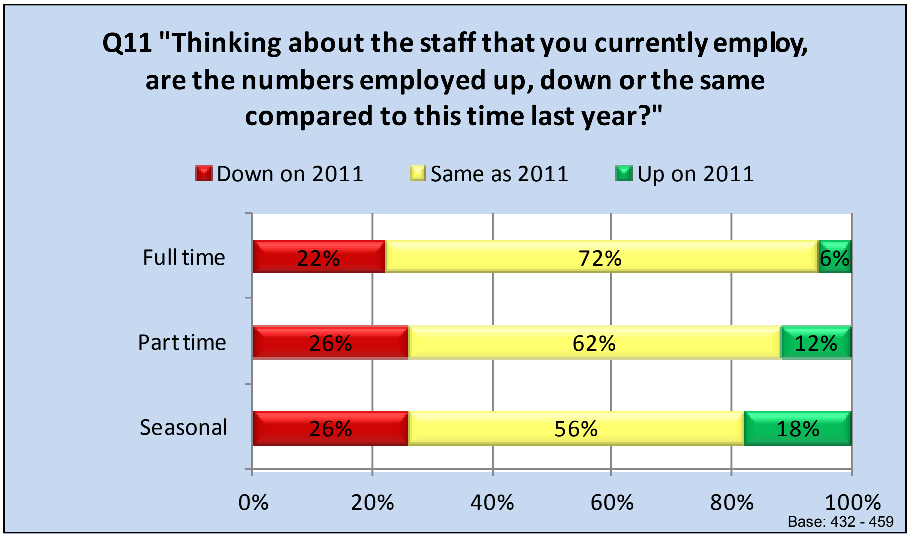
7.6 The outlook for the remainder of the year for overseas visitors is similar to the overall outlook – low expectations across all sectors except hotels.

7.7 However, as mentioned previously, expectations in the tourism industry are influenced by the time of year and the mindset that respondents are in when the busy season has finished and the winter is approaching.

Consistent picture across the main individual overseas markets

7.8 Q10 in the survey asked for expectations for individual overseas markets. The figures reflect the overall overseas outlook on the chart above.

8. Employment in 2012

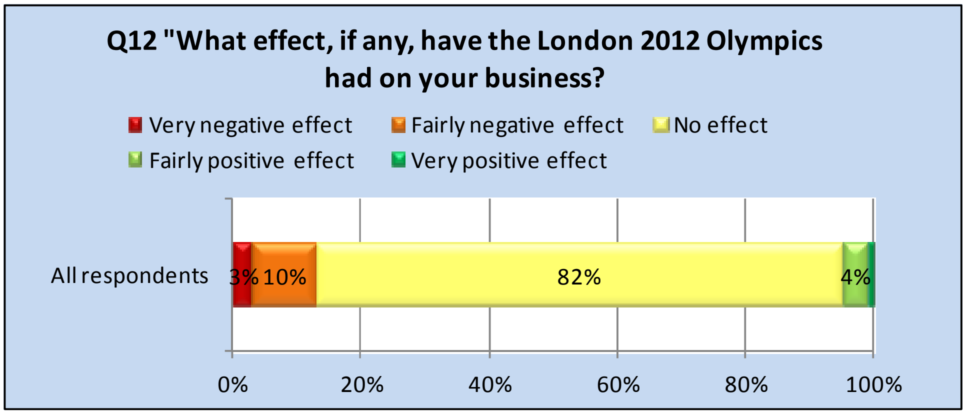


As many respondents (around half) do not employ any staff (other than the proprietors), base numbers for the employment questions are low and so results are grouped overall.

Seasonal staffing levels up in the hotel sector

8.1 Whilst rising costs and in some cases falling visitor numbers have prevented most businesses from taking on more staff, the hotel sector has seen an increase in seasonal staff. The sector is having a busy year and has needed the additional resources.

9. Impact of the Olympics



Most say the Olympics had little effect

9.1 The majority (82%) of respondents say that the Olympics had little effect on their business. Prior suggestions that British people would flee the country to escape the Olympics or that other nationalities would extend their trips to include Ireland have mostly not materialised.

"It was said that the British would want to escape the hustle and bustle of London around the Olympics, but it was the opposite – they were supporting team GB and stayed on home turf"
Hostel

Some operators had noticeable decline in British and European visitors

9.2 Some operators noticed a distinct decline in British visitors during the time of the Olympics, and to a lesser extent, from mainland Europe. It is thought that some European visitors travelled to Britain instead of Ireland, and British people remained in their own country instead of going anywhere.

"The Olympics in the UK was a hugely major attraction for Europeans, some of whom may otherwise have visited Ireland. Our European guests were considerably down this year"
Hostel

Some operators received more visitors from other continents

9.3 A small number of operators benefited from increased visitors from other continents, especially North America.

"It might have brought Americans, Canadians and Asians over for the couple of weeks either side the Olympics, but European visitors dropped off"
Hostel

"We have overseas visitors from the US who have been over for the Olympics and Ireland at the same time"
Attraction

Tours and air travel were affected

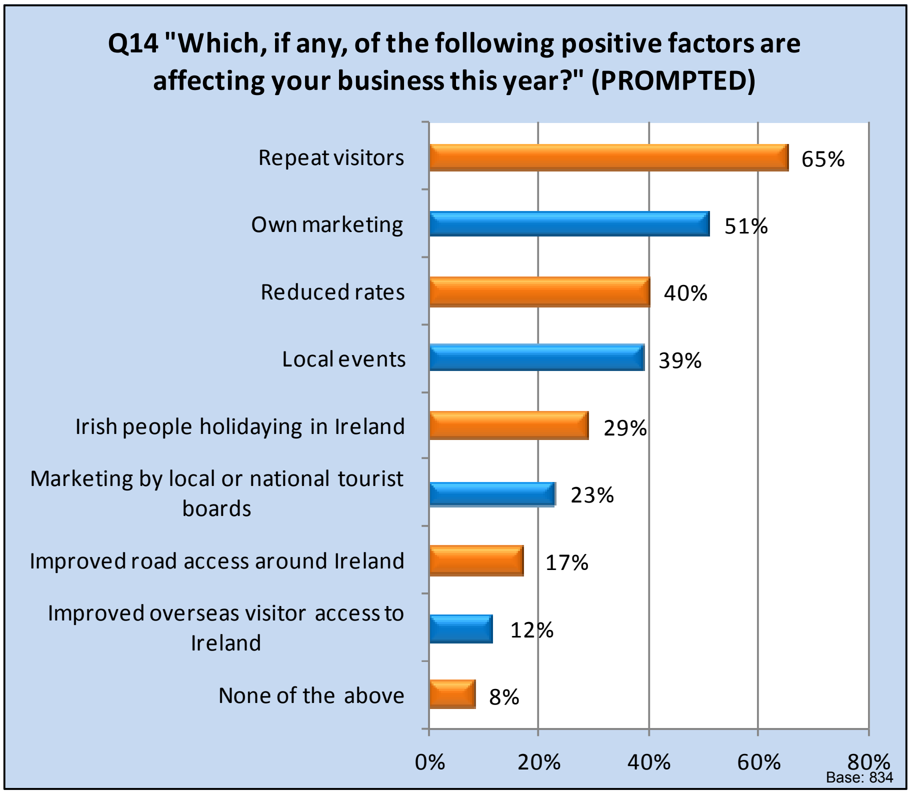
9.4 Some operators say that lack of air capacity and cost of air travel through London affected business coming through that route. Examples include tours to the UK & Ireland being cancelled because of the UK part of the tour.

"A lot of tour operators cancelled tours to Ireland as charges at Heathrow airport were sky high during the Olympics"
Attraction

"Some overseas tours that would combine UK and Ireland cancelled their series as accommodation was a problem on the UK side"
Attraction

"Tour business which comes through London had a big fall-off in numbers during the Olympics. We also received 18 coach cancellations during this period"
Hotel

10. Positive Factors in 2012



Repeat visitors remain the most frequently mentioned positive factor

10.1 Two in three (65%) respondents say that repeat visitors are a positive factor affecting their business in 2012. This was also the most frequently mentioned positive factor in 2011 and in the April barometer. This particular visitor group continues to be invaluable during challenging economic times.

Own marketing

10.2 About half (51%) of operators state 'own marketing' as a positive factor this year. Attractions appear to be particularly active in this area, and it is probably an important reason behind their relative success in 2012.

"We are upgrading our business and devising a new advertising campaign"
Attraction

Notre Dame vs Navy American football match

10.3 The start of September saw the Notre Dame vs Navy American football match taking place in Ireland, with a large influx of American tourists. Many operators have commented enthusiastically about the importance and the success of this event in bringing American visitors to Ireland.

"The Notre Dame game was a real addition to the flagging season and helped regain lost ground in July"
Hotel

"Notre Dame vs Navy ... terrific!"
Hotel

Volvo Ocean Race, Tall Ships and Titanic

10.4 Other successful events for tourism in 2012, all of them connected with boats and ships, included the Volvo Ocean Race (finishing in Galway in July), Tall Ships Ireland and the 100th anniversary of the Titanic.

10.5 In challenging economic times, the industry looks forward to any kind of event that could bring tourists to Ireland.

More favourable exchange rates for the dollar and the pound

10.6 The decline in value of the euro against the dollar and the pound has been commented on positively. There is evidence that the exchange rate has encouraged more Americans to travel to Ireland, although the GB market has remained quiet.

VAT rate

10.7 The reduced VAT rate has proved to be crucial for some businesses this year. There is now hope that it might remain low for as long as possible.

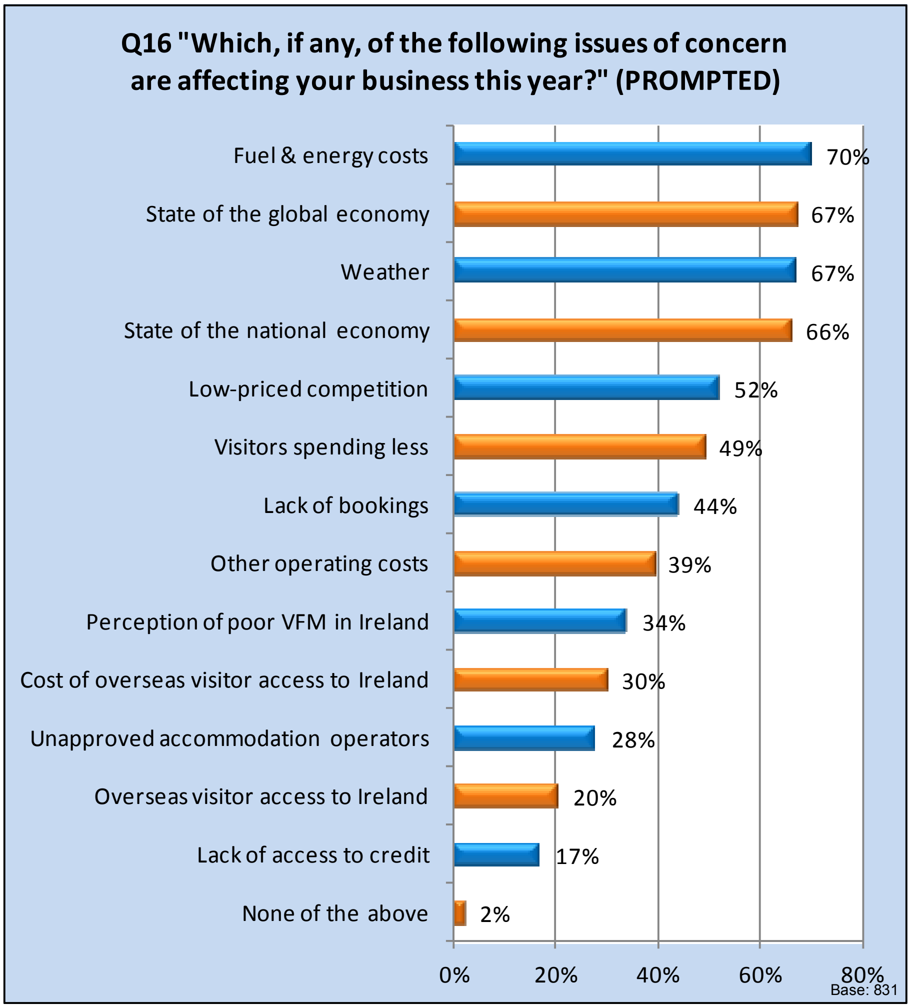
"Reduced VAT is a very, very great help in keeping me in business"
Guesthouse

Convention Centre Dublin

10.8 The CCD has brought in business this year, and some Dublin-based businesses are hopeful about its impact in future years too.

"Our close location to the CCD and them having a number of large conferences during the year really increased our occupancy and ARR"
Hotel

11. Issues of Concern in 2012



Fuel and energy costs – still the most common concern

11.1 Fuel and energy costs remain the most frequently mentioned issue of concern, although the proportion of businesses stating this has fallen from 80% to 70% since April.

Global and national economies – differing opinions

11.2 The state of the global and national economies continues to be a key issue of concern. Views on whether the economy is recovering yet are mixed.

"It's not that people don't have the money, it's that they don't know what's round the corner and are not willing to spend"
Hostel

"I feel we have hit the lowest point"
Hotel

11.3 Harsh economic times can be a benefit for some operators, as holidaymakers seek cheaper types of accommodation.

"People who would have spent money on hotels are now coming to hostels"
Hostel

Bad weather this summer

11.4 Unfortunately the industry was hit by bad weather this summer in Ireland. This has had a significant effect on the domestic market, which had been expected to perform well if the weather had held up, and on the most weather-dependent sectors such as camping and golf clubs. Only indoor attractions have actually benefited from the weather.

"The weather this year nearly finished us off"
Caravan park

Increasing rates – makes trading very difficult for small businesses

11.5 Increasing rates are having a significant effect on many small businesses already trying to cope with aggressive price competition in the industry and rising operating costs in other areas such as energy.

"Rates are just far too high to sustain for such a seasonal industry"
Guesthouse

"Local rates must be addressed as they are crippling small businesses"
Hostel

Low-priced competition – significant worry, but becoming less so

11.6 Earlier this year and last year, low-priced competition was a significant concern in the PSA sector, mainly among guesthouses, B&Bs and independently run hotels competing with bank and NAMA-operated hotels.

11.7 The concern is still significant, but perhaps less so, as the proportion stating this (62%) has fallen from 77% in April.

Cost of ferry access to Ireland

11.8 Some businesses are concerned about the cost of ferry access to Ireland – especially in the caravan & camping sector, where it is felt that British campers are going to mainland Europe instead of Ireland because of cost.

"It is very expensive to travel on the ferry or bring a motor home to Ireland"
Caravan park

12. Appendix 1 – Background and Methodology

Background and Objectives

12.1 The Fáilte Ireland Tourism Barometer is a survey of tourism businesses designed to provide insight into tourism performance for the year to date and prospects for the remainder of the season or coming year. It has been conducted regularly since 1999.

12.2 In April 2011 Strategic Marketing, an independent research agency, was commissioned to conduct the survey in 2011 and 2012.

12.3 Fieldwork for this second 2012 wave took place between 30th August and 2nd October. The objectives were to measure:

- Business performance to date in 2012 in terms of visitor volume – overall and by key markets – and profitability
- Average room yield year to date (hotels)
- Domestic performance by types of booking (hotels)
- Visitor volume expectations for the remainder of 2012
- Impact of the Olympics
- Employment levels
- Positive factors and issues of concern affecting business

Methodology

12.4 The methodology used was a combination of an online survey and telephone interviews.

12.5 Fáilte Ireland and Strategic Marketing worked together to produce a questionnaire for online and telephone interviewing. A copy of the questionnaire is included in appendix 2.

12.6 Fáilte Ireland provided a database of 3,204 usable contacts (i.e. not opted out) for the survey spread across eight industry sectors (discussed under 'sampling' below). An email was sent on 30th August to all contacts on the database containing a link to the online survey and an explanation of the survey objectives. Two subsequent reminder emails were sent to non-responders.

12.7 A total of 751 responses were received to the online survey – a response rate of 23%.

12.8 Following this, we conducted 90 'top-up' interviews by telephone with non-responders in order to improve the robustness of their individual sample sizes so that results can be reported by sector. Interviews were conducted in daytime and evening hours with business owners or managers.

12.9 The telephone survey was brought to a close on 28th September and the online survey was brought to a close on 2nd October.

Sampling

12.10 The table below shows the sample split by sector and interview methodology:

Sector	Online responses	Telephone top-ups	Total sample size
Hotels	114	10	124
Guesthouses	66	8	74
Bed & Breakfast	391	-	391
Self-catering	29	23	52
Caravan / campsites	27	14	41
Hostels	34	19	53
Attractions	71	10	81
Golf clubs	19	6	25
Total	**751**	**90**	**841**

Interviews for Contextual Background

12.11 In a separate exercise, we conducted eight in-depth telephone interviews with senior executives in key organisations. The purpose of these interviews was to provide a contextual background to the quantitative findings, and this is given in section 2 before the findings to the main quantitative survey. The key organisations interviewed were:

- Incoming Tour Operators Association
- Irish Hotels Federation
- Bed & Breakfast Ireland
- Irish Boat Rental Association
- Restaurants Association of Ireland
- Coach Tourism and Transport Council
- Irish Caravan and Camping Council
- Aer Lingus

Tourism Barometer – September 2012

Which of the following best describes your business type? (TICK ONE ONLY)

- *Hotel* ❑
- *Guesthouse* ❑
- *Bed & Breakfast* ❑
- *Self catering* ❑
- *Caravan / campsite* ❑
- *Hostel* ❑
- *Attraction* ❑
- *Golf club* ❑

Please note that the following questions refer to your accommodation business only

Please note that the following questions refer to your tourism 'green fee' business only

Q1 Has your business been established since before the start of 2011?

- *Yes* ❑ Go to Q2
- *No* ❑ Go to Q12

Q2 How does the volume of your overall business to date this year compare with the same period last year?

- *Up on 2011* ❑
- *Same as 2011* ❑
- *Down on 2011* ❑
- *Don't know* ❑

Q3 How does the volume of your overall business to date this year compare with the same period last year from each of the following markets? (N.B. *If you never receive visitors from a particular market on the list then please tick 'not applicable'*)

	Up on 2011	*Same as 2011*	*Down on 2011*	*Don't know*	*Not applicable*
Republic of Ireland	❑	❑	❑	❑	❑
Northern Ireland	❑	❑	❑	❑	❑
Overseas	❑	❑	❑	❑	❑

Q4 Looking at your overseas business in more detail, how does the volume of your business to date this year compare with the same period last year from each of the following markets? (N.B. *If you never receive visitors from a particular market on the list then please tick 'not applicable'*)

	Up on 2011	*Same as 2011*	*Down on 2011*	*Don't know*	*Not applicable*
Great Britain	❑	❑	❑	❑	❑
France	❑	❑	❑	❑	❑
Germany	❑	❑	❑	❑	❑
USA	❑	❑	❑	❑	❑

Q5 How does your overall profitability to date this year compare with the same period last year?

- *Up on 2011* ❑
- *Same as 2011* ❑
- *Down on 2011* ❑
- *Don't know* ❑

Q6 **(HOTELS) How does your <u>average room yield</u> to date this year compare with the same period last year?**

- *Up on 2011* .... ☐
- *Same as 2011* .... ☐
- *Down on 2011* .... ☐
- *Don't know* .... ☐

Q7 **(HOTELS) Thinking about your <u>Ireland</u> market business to date this year, how have each of the following performed compared with the same period last year?**

	Up significantly	*Up slightly*	*Same*	*Down slightly*	*Down significantly*	*Don't know*	*Not applicable*
Weekend breaks	☐	☐	☐	☐	☐	☐	☐
Mid-week breaks	☐	☐	☐	☐	☐	☐	☐
General leisure	☐	☐	☐	☐	☐	☐	☐
Business/corporate	☐	☐	☐	☐	☐	☐	☐
Special events	☐	☐	☐	☐	☐	☐	☐

Q8 **How do you <u>expect</u> the volume of your overall business to perform during the remainder of this year compared to the same period last year?**

- *Up on 2011* .... ☐
- *Same as 2011* .... ☐
- *Down on 2011* .... ☐
- *Don't know* .... ☐

Q9 **How do you <u>expect</u> the volume of your overall business to perform during the remainder of this year compared to the same period last year from each of the following markets?**

	Up on 2011	*Same as 2011*	*Down on 2011*	*Don't know*	*Not applicable*
Republic of Ireland	☐	☐	☐	☐	☐
Northern Ireland	☐	☐	☐	☐	☐
Overseas	☐	☐	☐	☐	☐

Q10 **How do you <u>expect</u> the volume of your <u>overseas</u> business to perform during the remainder of this year compared to the same period last year from each of the following markets?**

	Up on 2011	*Same as 2011*	*Down on 2011*	*Don't know*	*Not applicable*
Great Britain	☐	☐	☐	☐	☐
France	☐	☐	☐	☐	☐
Germany	☐	☐	☐	☐	☐
USA	☐	☐	☐	☐	☐

Q11 **Thinking about the number of staff that you currently employ, that is full time, part time and seasonal, are the numbers currently employed up, down or the same for each type of employee compared to this time last year? (N.B. *If you don't currently employ a particular type of employee on the list and didn't last year either, please use the 'not applicable' option*)**

	Up on last year	*Same as last year*	*Down on last year*	*Don't know*	*Not applicable*
Full time	☐	☐	☐	☐	☐
Part time	☐	☐	☐	☐	☐
Seasonal	☐	☐	☐	☐	☐

Q12 **What effect, if any, have the London 2012 Olympics had on your business?**

- *Very positive effect* .... ☐
- *Fairly positive effect* .... ☐
- *No effect* .... ☐
- *Fairly negative effect* .... ☐
- *Very negative effect* .... ☐
- *Don't know* .... ☐

Q13 **(IF AFFECTED) In what way(s) have the Olympics had an effect on your business?**

Q14 **Which, if any, of the following positive factors are affecting your business this year? (READ OUT, PLEASE TICK ALL THAT APPLY)**

- *Own marketing* .... ❑
- *Marketing by local or national tourist boards* .... ❑
- *Improved road access around Ireland* .... ❑
- *Improved overseas visitor access to Ireland* .... ❑
- *Local events* .... ❑
- *Repeat visitors* .... ❑
- *Irish people holidaying in Ireland* .... ❑
- *Reduced rates* .... ❑
- *None of the above* .... ❑

Q15 **Are there any other positive factors affecting your business this year which you would like to comment on?**

Q16 **Which, if any, of the following issues of concern are affecting your business this year? (READ OUT, PLEASE TICK ALL THAT APPLY)**

- *State of the national economy* .... ❑
- *State of the global economy* .... ❑
- *Perception of poor value for money in Ireland* ..... ❑
- *Low-priced competition* .... ❑
- *Fuel and energy costs* .... ❑
- *Other operating costs (besides fuel and energy)* . ❑
- *Lack of access to credit* .... ❑
- *Weather* .... ❑
- *Lack of bookings* .... ❑
- *Visitors spending less* .... ❑
- *Overseas visitor access to Ireland* .... ❑
- *Cost of overseas visitor access to Ireland* .... ❑
- *Unapproved accommodation operators* .... ❑
- *None of the above* .... ❑

Q17 **Are there any other issues of concern affecting your business this year which you would like to comment on?**

If you would like future surveys to be sent to an email address different from the one we used this time, please state the new email address below. Otherwise please leave the box blank. All information that is provided is strictly confidential and any contact details provided by you will only be used by Strategic Marketing in administering the Tourism Barometer during 2012.

Thank you for completing Fáilte Ireland's Tourism Barometer for September 2012. Please now click on 'submit' below.