STRATEGIC MARKETING

Fáilte Ireland
National Tourism Development Authority

Tourism Barometer

April 2012

Contents **Page**

1. Headline Findings

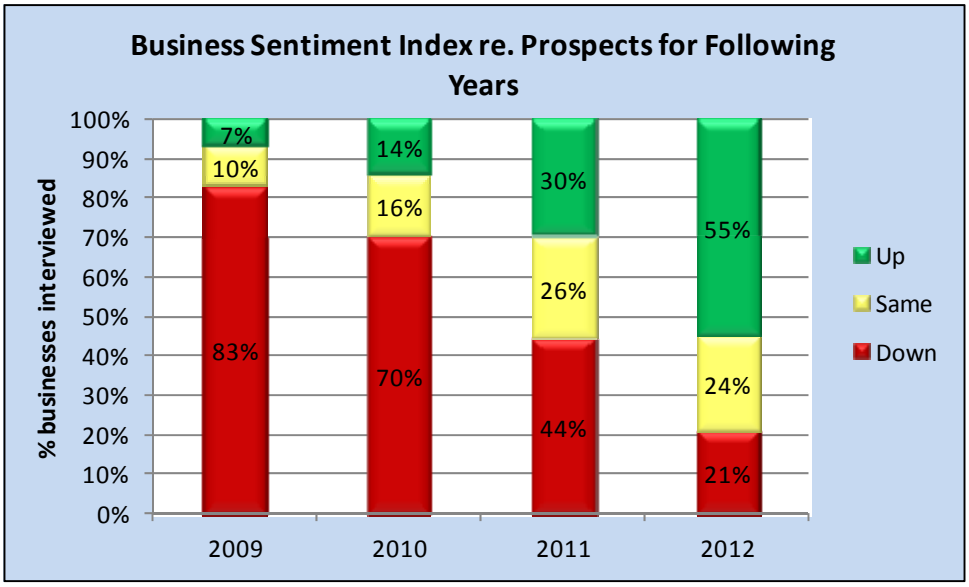
Background to the Tourism Barometer

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 769 responses to an online survey with tourism businesses between 2nd and 20th April 2012 and conducted 91 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. Over half (55%) of respondents to the survey in the paid serviced accommodation (PSA) sector expect overall business levels in 2012 to be up on last year, with only one in five (21%) anticipating declines. This is a significant change following a number of years of pessimism.



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

Visitor numbers up in 2012 for paid serviced accommodation

1.2 Just under half (47%) of respondents[1] in the paid serviced accommodation sector report an increase in visitor volumes to date in 2012 compared the same period last year. About three in ten (29%) report a decrease.

1.3 This positive result is mostly due to the strong performance in terms of visitor numbers of the hotel sector. Just over half (54%) of hotels report increased visitors; but this compares to a minority of guesthouses (19%) and B&Bs (11%) reporting increased visitors.

Hotel visitor numbers are up but average room yields are down

1.4 Although visitor numbers are looking positive in 2012 for hotels, this increase has come at the expense of reduced rates, as was the case last year. About a third (32%) of hotels report an increased average room yield in 2012, but nearly half (45%) report a decrease.

A good start to the year for attractions

1.5 Attractions have enjoyed a positive start to the year. About a third (34%) have increased their visitor numbers to date compared to this time last year and about half (51%) have achieved the same level.

1.6 Marketing appears to be a key reason behind success in the attractions sector, with about three in four (74%) stating 'own marketing' as a positive factor affecting their business, and three in five (60%) citing 'marketing by local or national tourists boards'.

Domestic market up for paid serviced accommodation

1.7 Slightly under half (44%) 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. Half (50%) of hotels have increased their domestic visitor numbers year to date, but the majority (63%) of B&Bs have experienced a decrease.

Overseas visitor volumes fairly balanced for paid serviced accommodation

1.9 About a third (32%) of respondents in the paid serviced accommodation sector have experienced increased overseas visitors to date in 2012, but a similar proportion (34%) report a decrease.

[1] weighted by available bedrooms in the sector

Mixed fortunes over Easter

1.10 Easter visitor numbers were disappointing in the Paid Serviced Accommodation (PSA) sector, with about two in five (41%) operators reporting a decrease in actual or expected numbers. Attractions performed well however, with two in five (40%) increasing their visitors compared to last year and nearly half (45%) achieving the same level.

Positive outlook for 2012

1.11 Every sector apart from B&Bs expects 2012 visitor numbers to be up on 2011. Much is expected of the domestic and US markets.

Full time staffing levels slightly down in 2012

1.12 Profit margins in the industry are being squeezed significantly by falling prices and rising costs, and this is inevitably taking its toll on staffing levels. Full time staffing levels are down in every sector.

Repeat visitors and marketing are key in 2012

1.13 Two in three (66%) respondents say that repeat visitors are a positive factor likely to affect their business in 2012. About three in five (58%) cite 'own marketing' as a likely positive factor, and just under half (46%) say 'marketing by local or national tourist boards'.

Fuel and energy costs – the most common concern

1.14 Four in five (80%) respondents refer to 'fuel and energy' costs as an issue of concern in 2012. This is followed by state of the national economy (72%), although there are some reports that the country has maybe turned the corner now.

1.15 Low-priced competition continues to be a major issue, especially in the PSA sector, where most (77%) mention this as a concern in 2012.

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.

2012 is generally expected to be busier than 2011, but still a long way to go

2.1 The general feeling across the different industry sectors is that 2012 is likely to be a better year than 2011 in terms of visitor numbers. However, the economic climate is still very tough, and receiving more visitors doesn't necessarily mean more profit.

"There's a good deal of positivity – tour operators expect a better year than 2011"

"We haven't turned the corner yet, there's still a lot needs sorting out with the economy. It's the fourth year in a row that hotel rates are level or down – they are now sometimes below the B&B rate"

"Coach tourism seems busier than last year but operators aren't upbeat because rates aren't any higher"

Rising fuel prices affecting margins in most sectors

2.2 The cost of fuel is eating into profits directly or indirectly in most sectors, especially those most closely linked to transport. The effect in some sectors is that operators can survive, but there is no cash to invest in improving the product.

"Fuel price is taking away profit needed for investment in vehicles"

Tourism hotspots are doing well; other areas are not

2.3 Trade is good in tourism hotspots such as Dublin, Galway City and Killarney – in fact it is hard for tour operators to find the required bed space at certain times of year. However, outside of the hotspots, even a short distance outside, times are tough.

"The restaurant sector is doing well in Dublin only. Outside Dublin it's in a negative decline – 5 to 10%"

Ireland's value for money is improving

2.4 Ireland has suffered from an unfortunate reputation of being poor value for money for some time, but the feeling is this is definitely changing.

"Ireland is definitely much more competitive now"

Much is expected from the US market

2.5 The consensus across sectors that receive a lot of business from the USA is that this market will be up this year.

"USA may be 6-7% up this year"

Germany – the 'star performer' in Europe because of increased access

2.6 The German market is looking positive this year as both Irish and German airlines have increased their routes between the two countries.

"Germany is performing very well for tour operators. Aer Lingus has increased routes and so has Lufthansa into Knock"

Impact of the Olympics is unclear

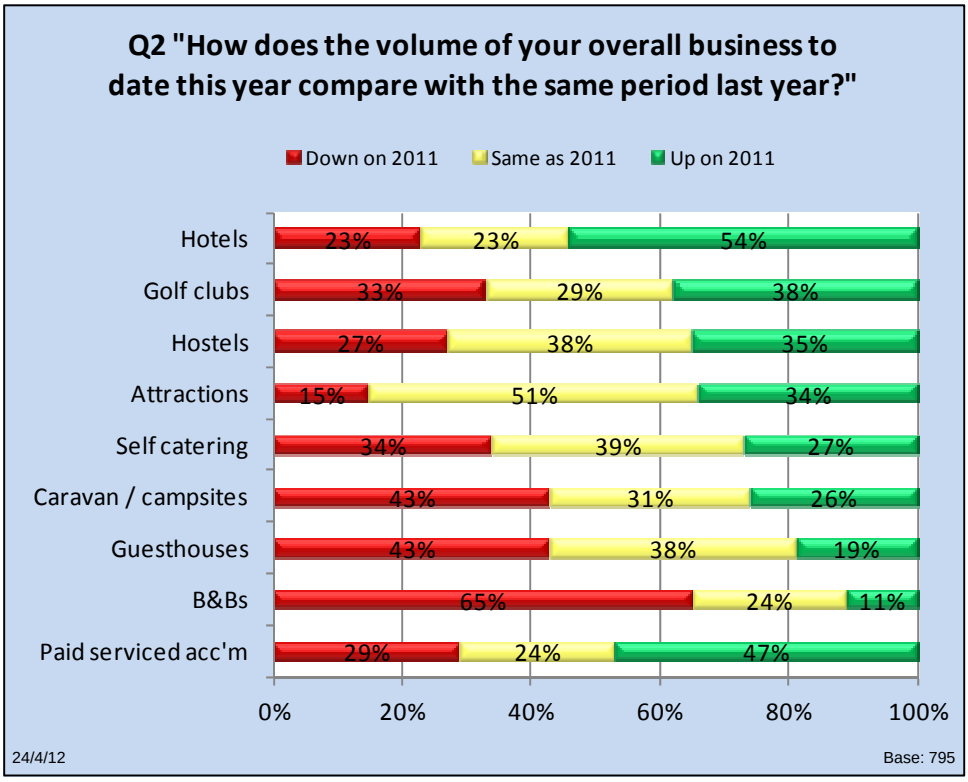
2.7 Whether the London Olympics will impact on tourism to Ireland and to what extent is still unclear. The four year extension of Ireland's short-stay visa waiver programme to nationalities such as the Chinese is thought to be very positive. On the negative side, the cost of air travel during the summer has increased significantly because of the Olympics.

"The visa extension is very positive as it was originally only going to be until the autumn. It always needed to be given more time anyway for the trade in Ireland to capitalise on the opportunity"

"The cost of air travel during a six week period surrounding the Olympics is significantly higher than normal"

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.

Positive start to the year in some sectors

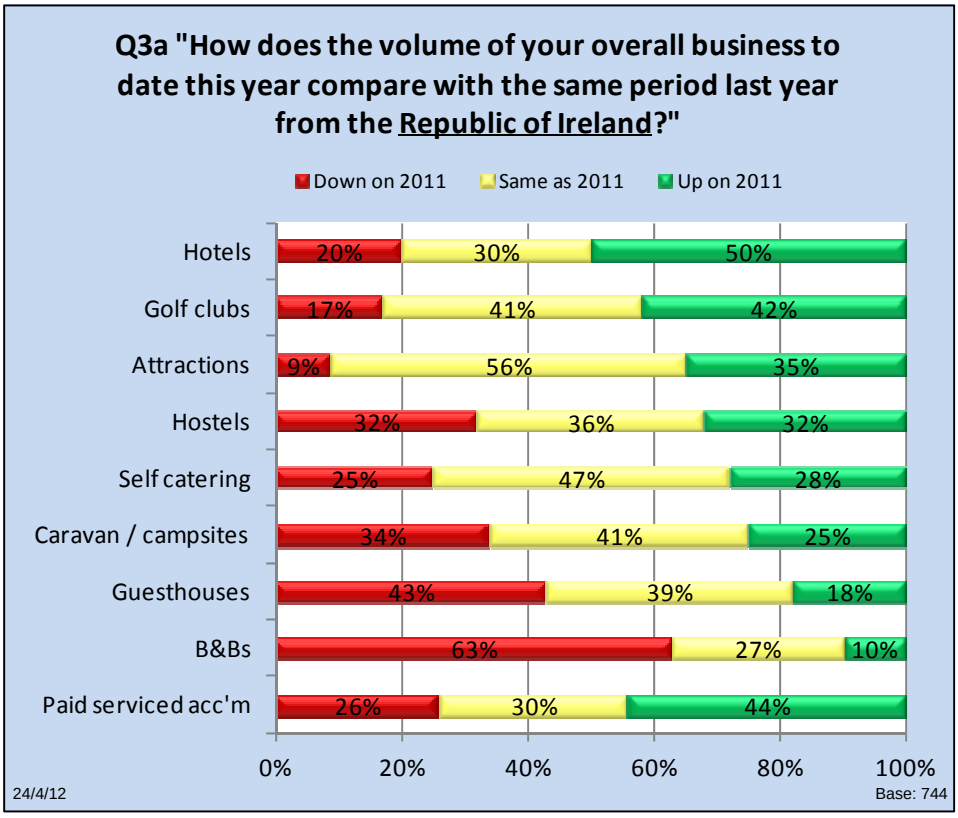
3.1 Nearly half (47%) of businesses in weighted paid serviced accommodation report that visitors are up compared to this time last year. However the difference in performance between the hotel sector and the guesthouse and B&B sectors is substantial.

Profit margins under continued pressure however

3.2 The very positive picture seen in hotel visitor numbers should be viewed with some caution however, as pressure on profit margins from rising costs and

aggressive price competition in the market means that many businesses are fighting for survival.

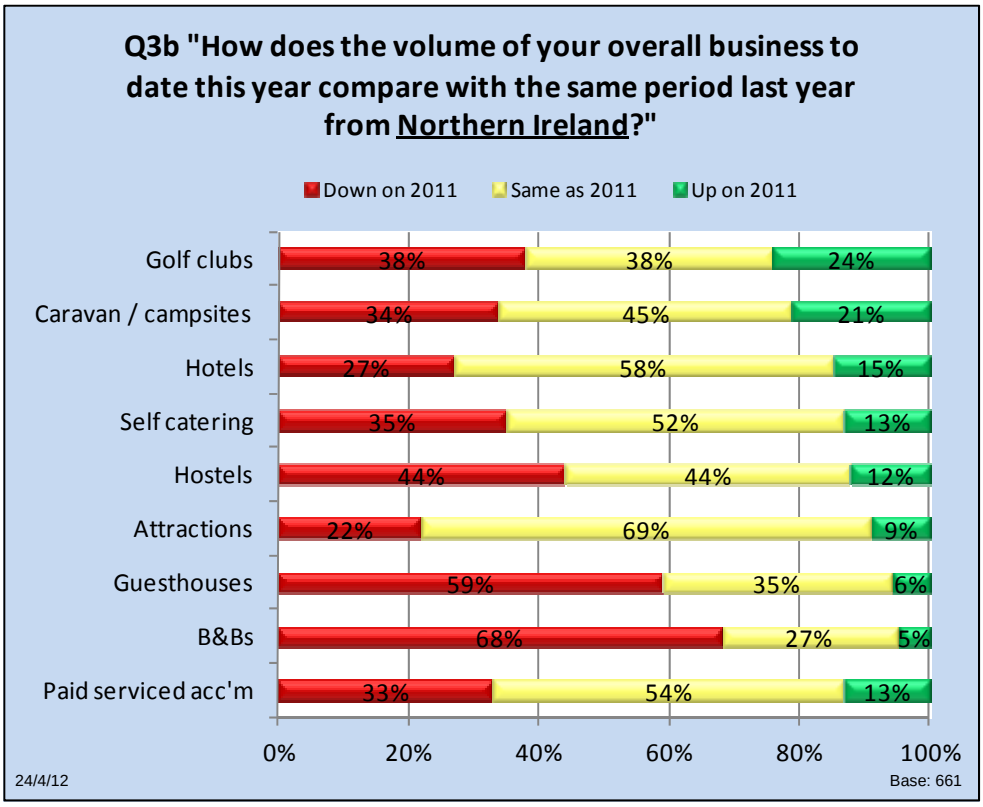
Domestic visitors



Domestic market by sector – reflects the overall market

3.3 The domestic visitor volumes by sector reflect the overall volumes by sector, with hotels, golf clubs and attractions enjoying a busy start to the year, but at the other end of the scale, guesthouses and B&Bs are less positive.

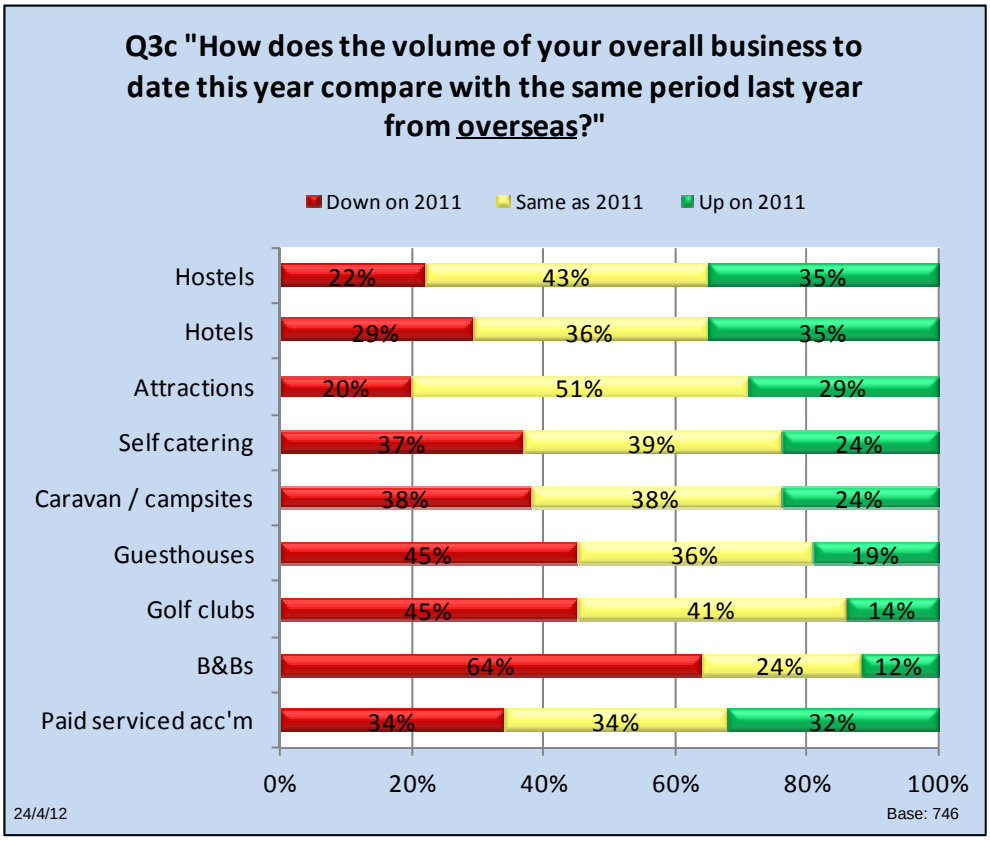
Visitors from Northern Ireland



Northern Ireland market continues to be down significantly

3.4 Visitors from Northern Ireland are significantly down in every sector, as was also the case throughout 2011 compared to 2010.

Overseas visitors

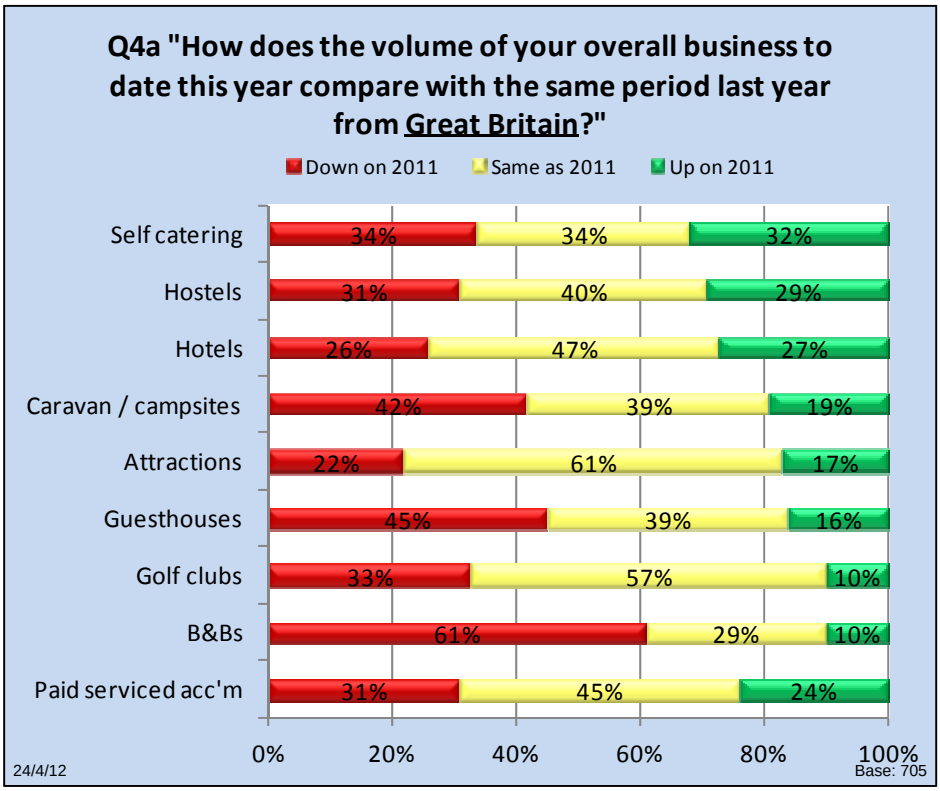


Overseas visitor volumes fairly balanced for paid serviced accommodation

3.5 About a third (32%) of respondents in the paid serviced accommodation sector have experienced increased overseas visitors to date in 2012, but a similar proportion (34%) report a decrease.

Visitors from Great Britain

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



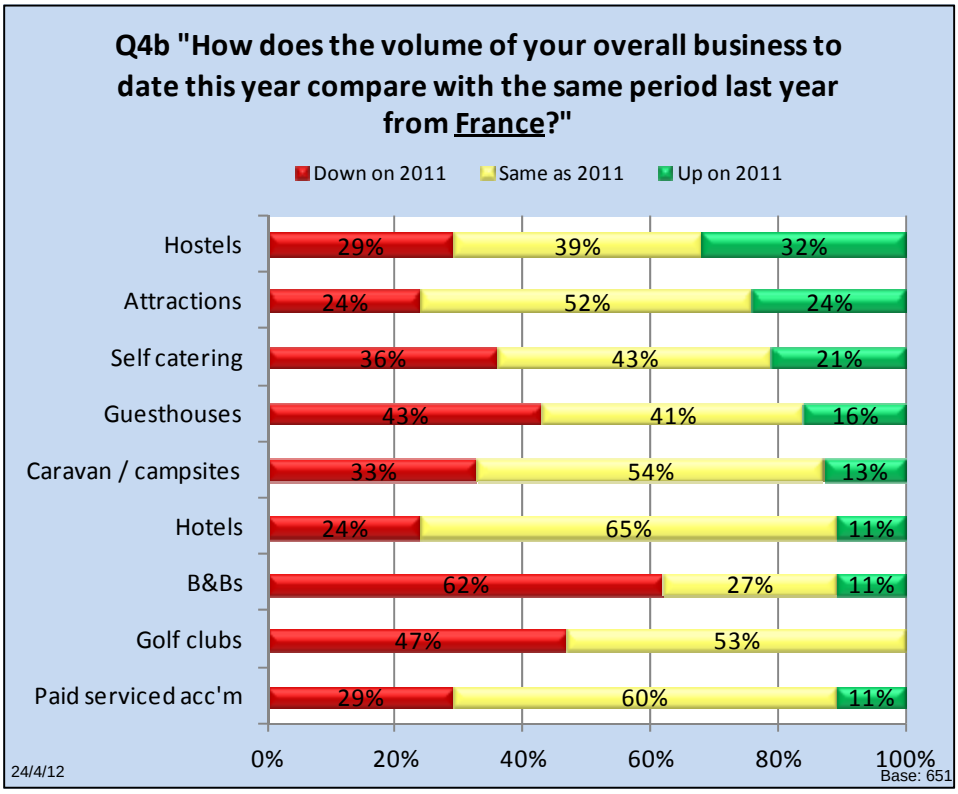
Visitors from Britain slightly down, but hints of recovery

3.6 2011 was a bad year for tourism from Britain, with many British holidaymakers remaining on the other side of the Irish Sea taking 'staycations'.

3.7 Although 2012 has not seen a great start for this market, there are hints that the British may be starting to come again. The exchange rate is thought to play a part.

"I think the strength of sterling against the euro will encourage people to come over here"
Golf club

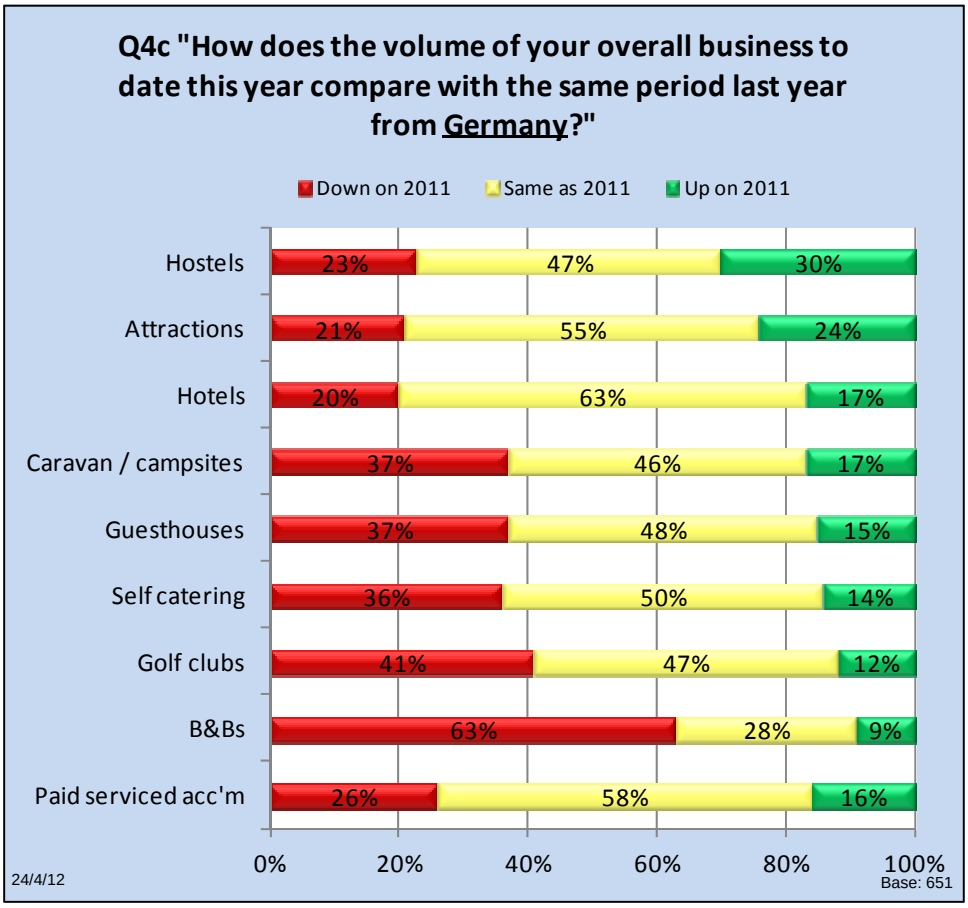
Visitors from France



French market slightly down so far this year

3.8 The French market was quite stable in 2011 but it is down so far this year in most sectors.

Visitors from Germany

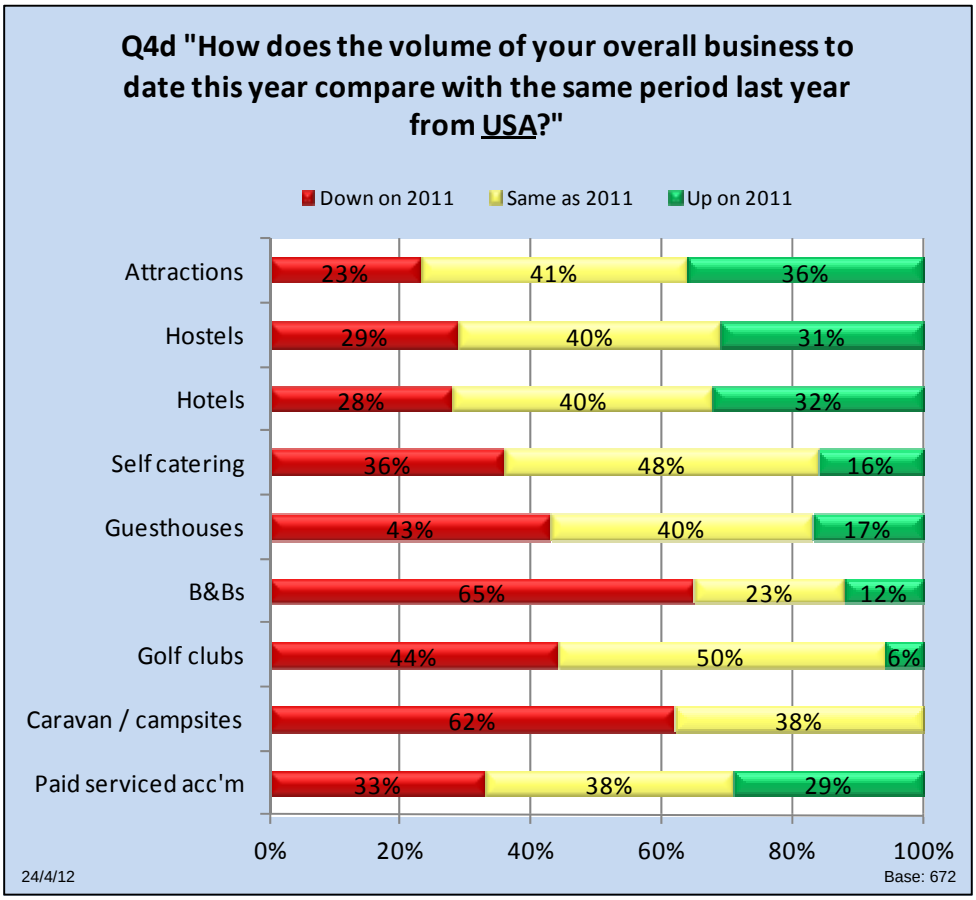


German market – similar to France

3.9 The German market performance has been similar to that of the French market so far this year, with visitor volumes down in most sectors.

"We've noticed an increase in German visitors, mostly because of our own marketing and that of the tourist board"
Hostel

Visitors from USA



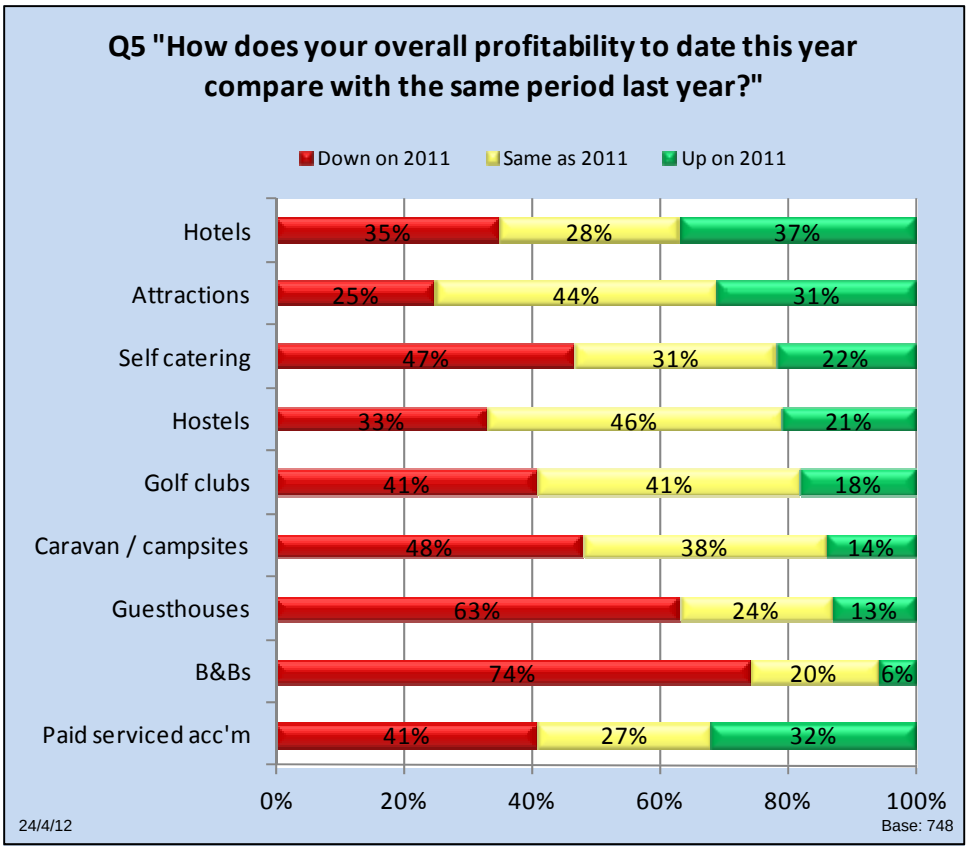
American market remaining strong for attractions and hotels

3.10 The attractions and hotel sectors saw good visitor levels in 2011 from the American market, and 2012 has started reasonably well.

"Our American visitors are up, but not those who come directly from the states. I would say about 75% of them are students studying in Europe who come over for weekends or spring break"
Hostel

"Enquiries from North America seem to be up this year"
B&B

4. Profitability



Profit margins under continued pressure – especially in smaller businesses

4.1 Some businesses, especially in the hotel and attractions sectors, are managing to increase profitability compared to last year in spite of testing times.

4.2 However many businesses, especially in smaller serviced accommodation, are under huge pressure to make ends meet. Aggressive price competition brought on by over-capacity makes it very difficult to maintain prices let alone increase them, whilst at the other end margins are being eroded by rising operating costs.

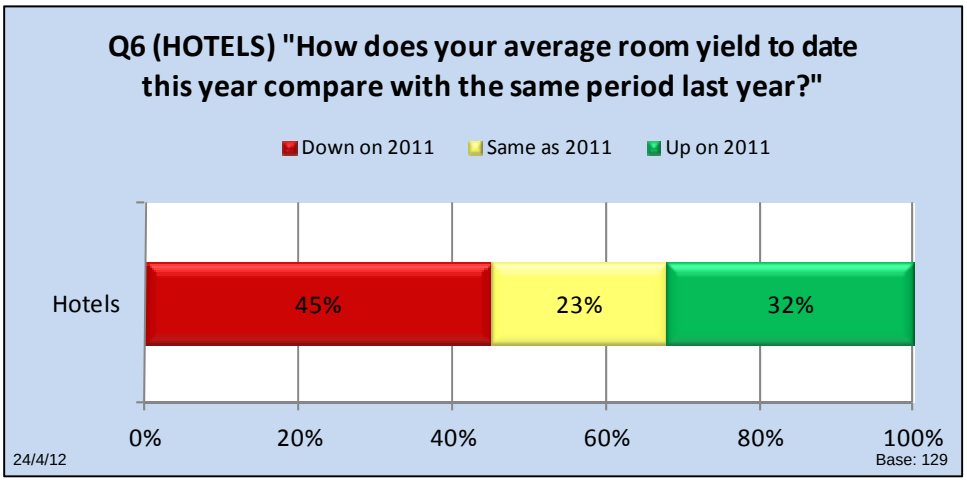
"There's a downwards pressure on prices, but there's also a threshold that you can't go below or you'll not make any money. Marginal profit is better than none – that would see hotel businesses close"
Hotel

"I genuinely believe I will be forced out of the B&B within the next two years as the profit margin is shrinking at an alarming rate"
B&B

4.3 Reduced profit over a period of time eventually starts to affect the quality of the product as there is no money to make improvements.

"High overheads and reduced profits make it impossible to revamp premises"
B&B

5. Average Room Yield



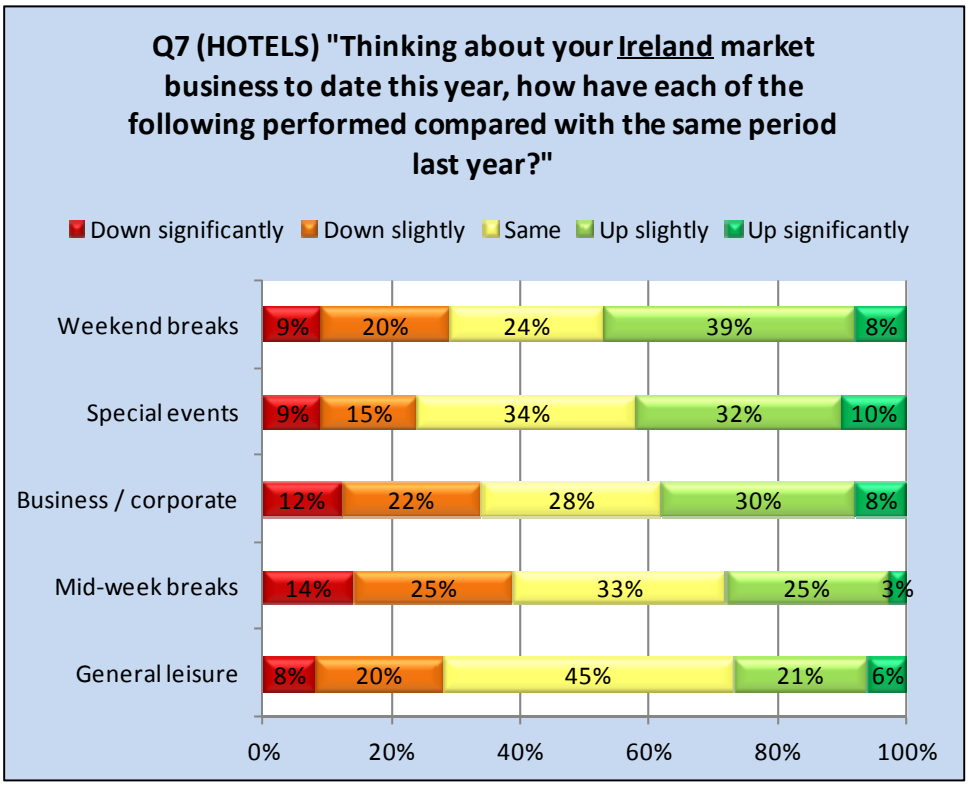
The above question has only been asked of hotel operators

5.1 Visitor levels are up in 2012 for over half (54%) of hotels, but average room yield is only up for about a third (32%).

Increased visitor numbers at lower rates

5.2 It appears that increased visitor volumes continue to be achieved mostly by lowering rates. Hotels can make back revenue through their facilities such as the bar and the restaurant, but average room yields are taking a hit again this year.

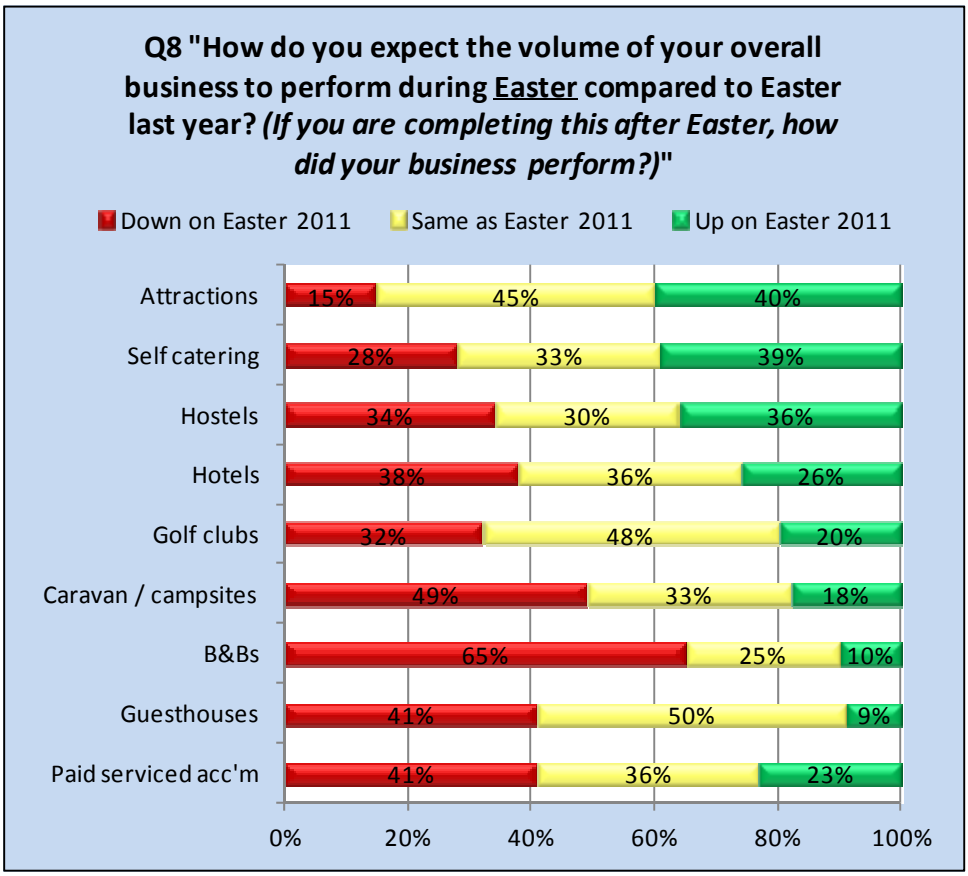
6. Types of Booking – Hotels (Ireland Market)



Some signs of the corporate market picking up

6.1 When the global economy first ran into difficulties, business tourism was one of the first areas to be hit hard as companies cut back on events, face-to-face meetings and travel. There are signs that the market may be on the up again. There also appears to be an upturn in the level of weekend breaks and special events in the domestic market – perhaps reflecting an improvement in the level of disposable income or consumer sentiment in the market.

7. Easter



The online survey was launched a few days before Easter, but many responses were made after Easter, hence the reason for two different questions.

Mixed fortunes over Easter

7.1 Easter visitor numbers were disappointing in the PSA sector, with about two in five (41%) operators reporting a decrease in actual or expected numbers. Attractions performed well however, with two in five (40%) increasing their visitors and nearly half (45%) achieving the same level.

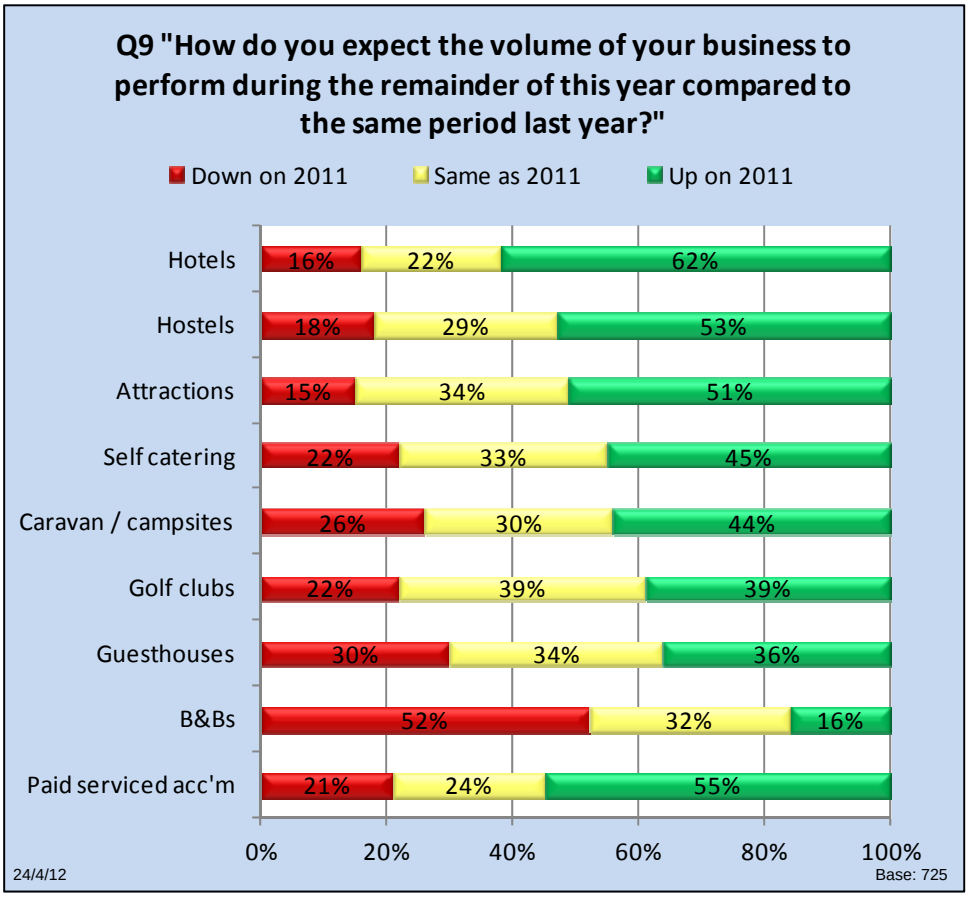
Easter came earlier

7.2 Last year Easter Sunday fell two weeks later than this year. Tourism business operators often comment that Easter is normally busier the later it falls.

"Earlier Easter made a difference. Easter is just always better when it falls later – the weather is slightly warmer, the timing of the school holidays works out a bit better"
Qualitative interview

8. Expectations for 2012

Overall expectations

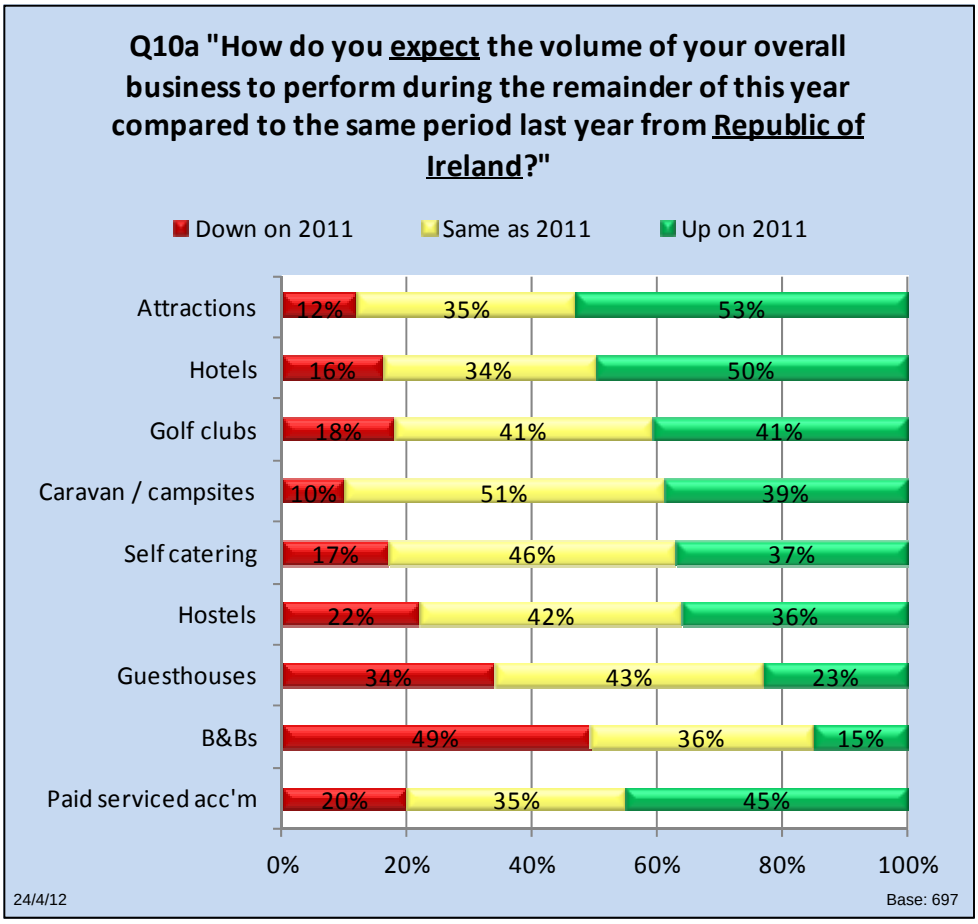


High hopes for 2012

8.1 Expectations for 2012 are high across the industry, with hotels, hostels and attractions being particularly optimistic. The only sector with low expectations is B&Bs.

"Reasons to be positive – reduced VAT, greater efficiencies ... improved market penetration in existing and new markets, rise in economy of target markets, more disposable spend in home market"
Hotel

Domestic expectations

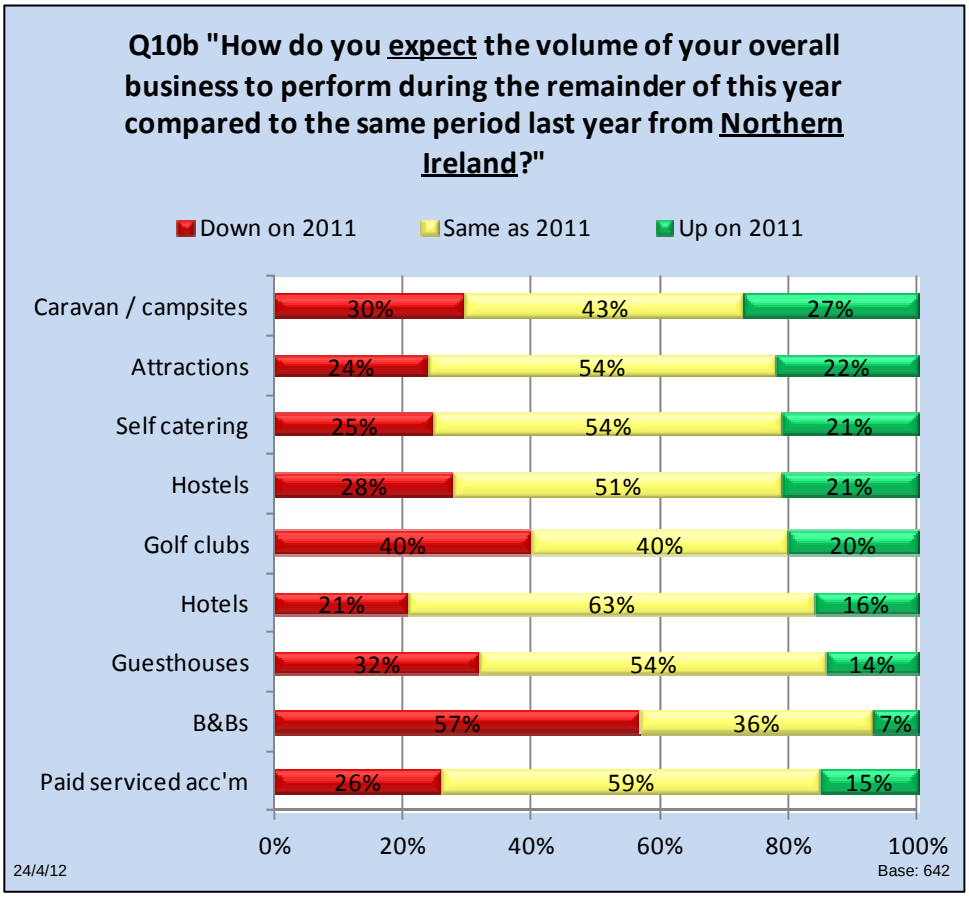


Strong expectations for the domestic market

8.2 Optimism for the domestic market is high in every sector apart from the smaller serviced sectors.

"I think that the domestic market would improve greatly if we had a really good summer this year"
Caravan park

Northern Ireland expectations

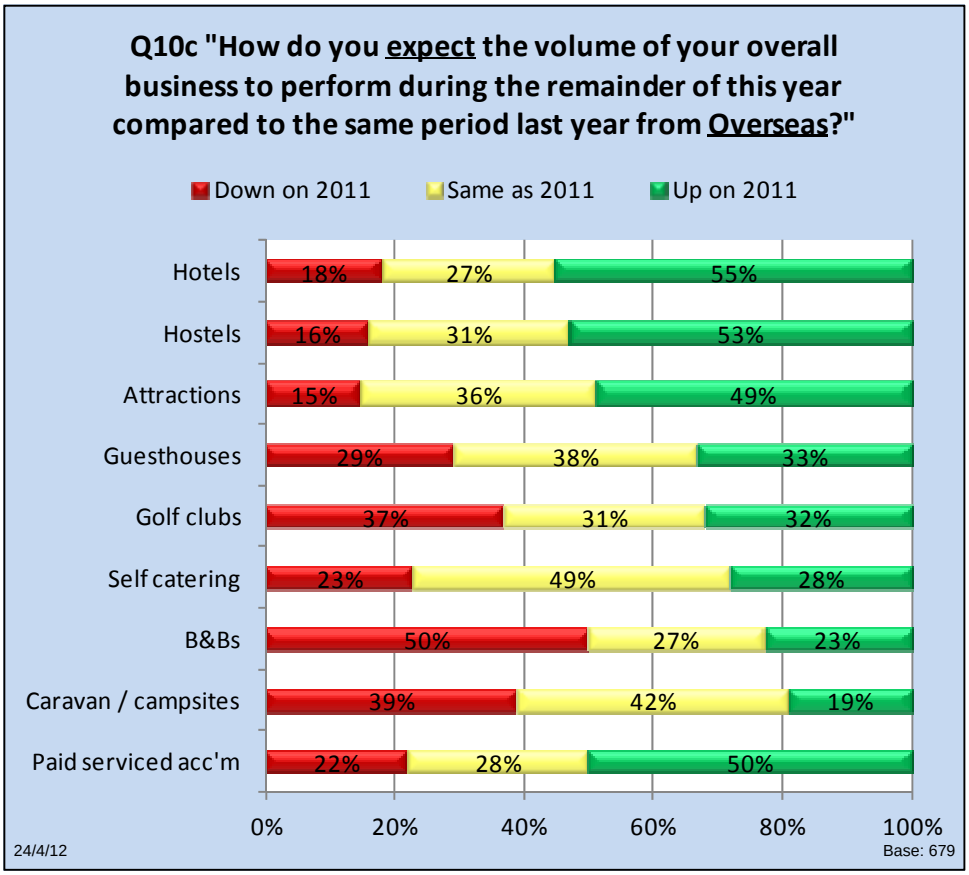


Not much expected of Northern Ireland

8.3 Visitor levels from Northern Ireland were significantly down throughout 2011. On the whole, this market is not expected to pick up in 2012.

"The access from Northern Ireland is the greatest concern for us, as that is where the majority of our business comes from"
Golf club

Expectations from overseas



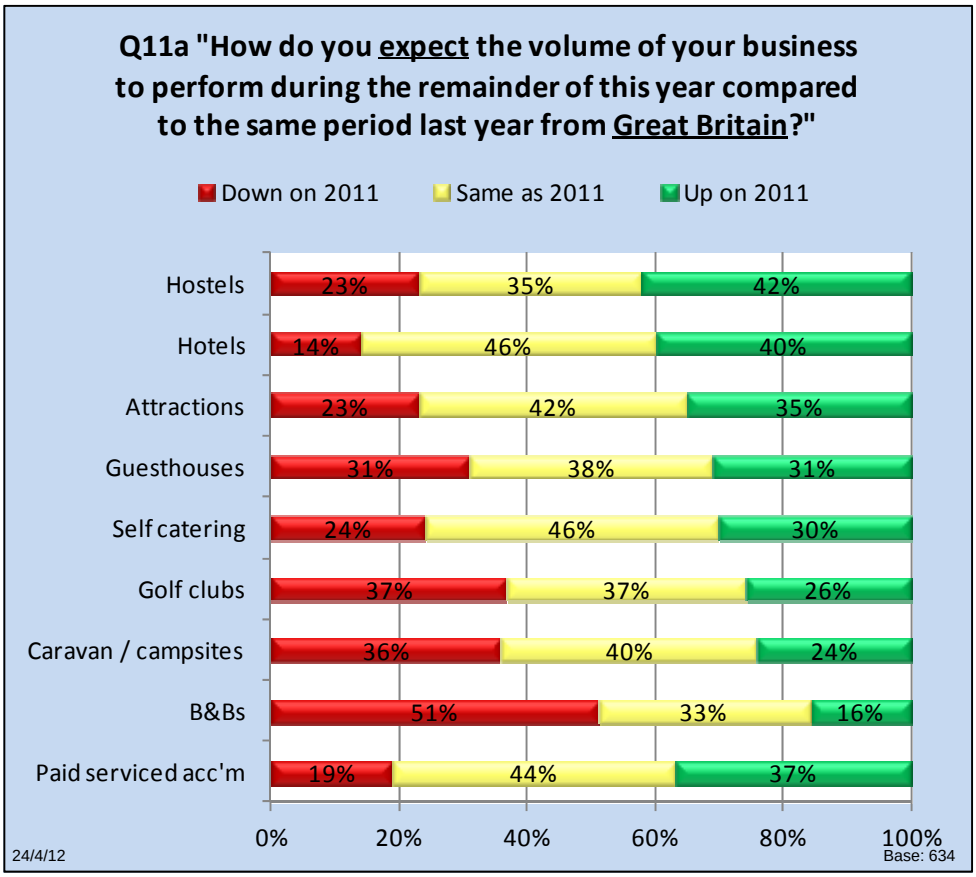
Optimistic outlook for overseas

8.4 The industry has high expectations for overseas visitors in 2012, especially the hotel sector, where over half (55%) of operators expect the overseas market to be up.

"I expect an improvement on the number of overseas walkers this year. Bookings to date indicate this"
B&B

Expectations for Great Britain

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



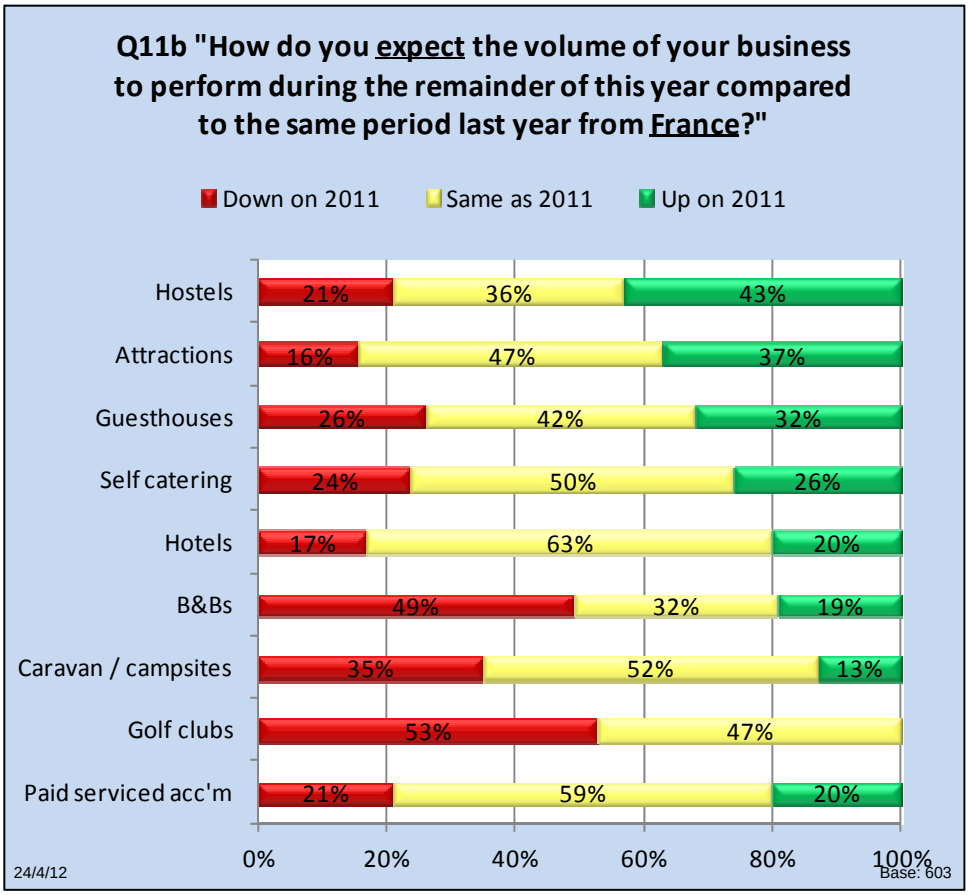
Cautious optimism over Britain

8.5 2011 was a disappointing year for this market as many British holidaymakers stayed away from Ireland and remained in their own country. Many operators are eagerly awaiting their return, and there is cautious optimism that this market might pick up again in 2012.

"I think the conversion rate with the euro has improved slightly so we might get more visitors from the UK"
Caravan park

"Ireland has had a lot of international press thanks to the visits of the US President and the Queen. I do hope we see benefits from both of these visits"
Attraction

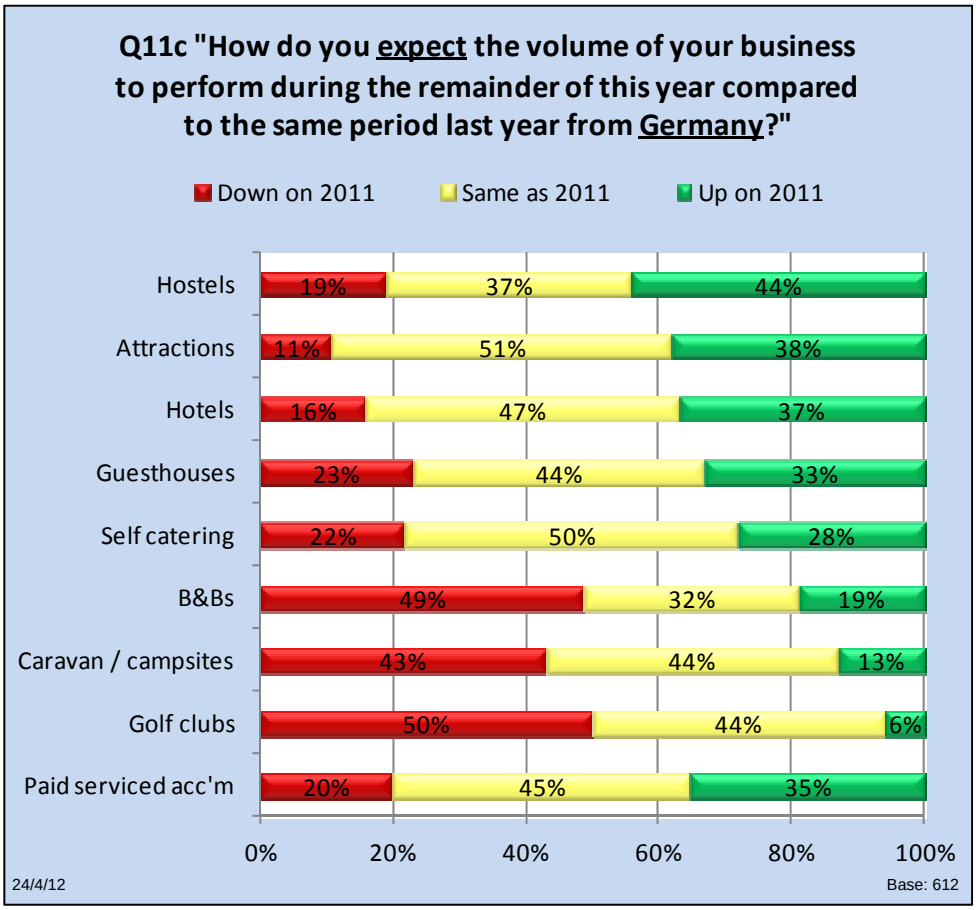
Expectations for France



Steady France

8.6 The French market has started a bit down this year, but the general expectation is that it will perform at a similar level to last year through the remainder of the year.

Expectations for Germany



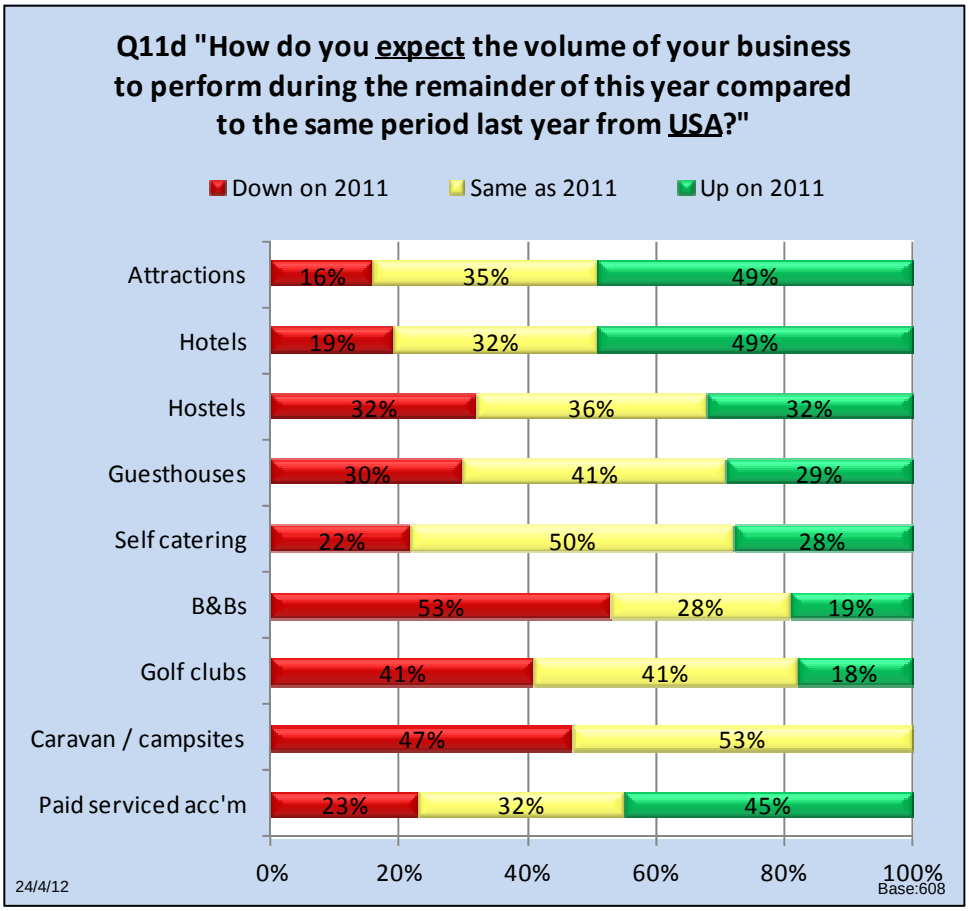
More expected of Germany

8.7 Most of the main sectors expect to see an increase in German visitors this year. Only the B&B sector is pessimistic (*the caravan and golf club figures for this question are based on low base numbers and so should be treated with caution)*.

"Influx of German visitors to Donegal"
Hotel

"We have been getting a lot of Germans recently. The gardens tours especially are very popular with them"
Attraction

Expectations for USA



High expectations for USA

8.8 Expectations for the US market are the highest of any major overseas market. Hotel and attraction operators are especially optimistic, with half (49%) expecting to see increased visitors.

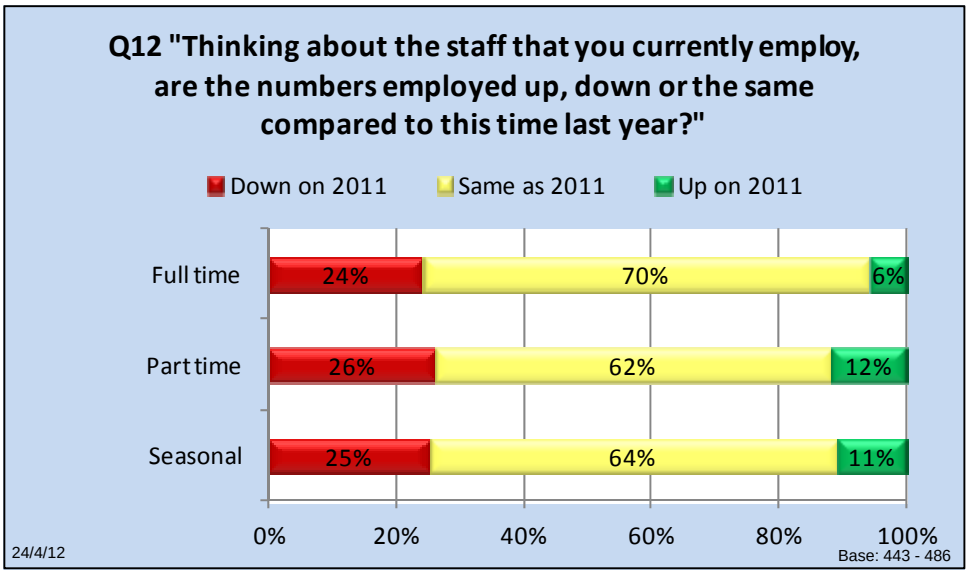
"Improved economic situation in USA – better value for dollar"
Hotel

8.9 2012 is presidential election year in America. Some operators say this makes a big difference to American visitor numbers, but others disagree.

"We find that we get a lot fewer American visitors whenever there's a presidential election on, the difference is considerable"
Caravan park

"I lived in America through two elections and never noticed it made any difference to travel"
Qualitative interview

9. Employment in 2012

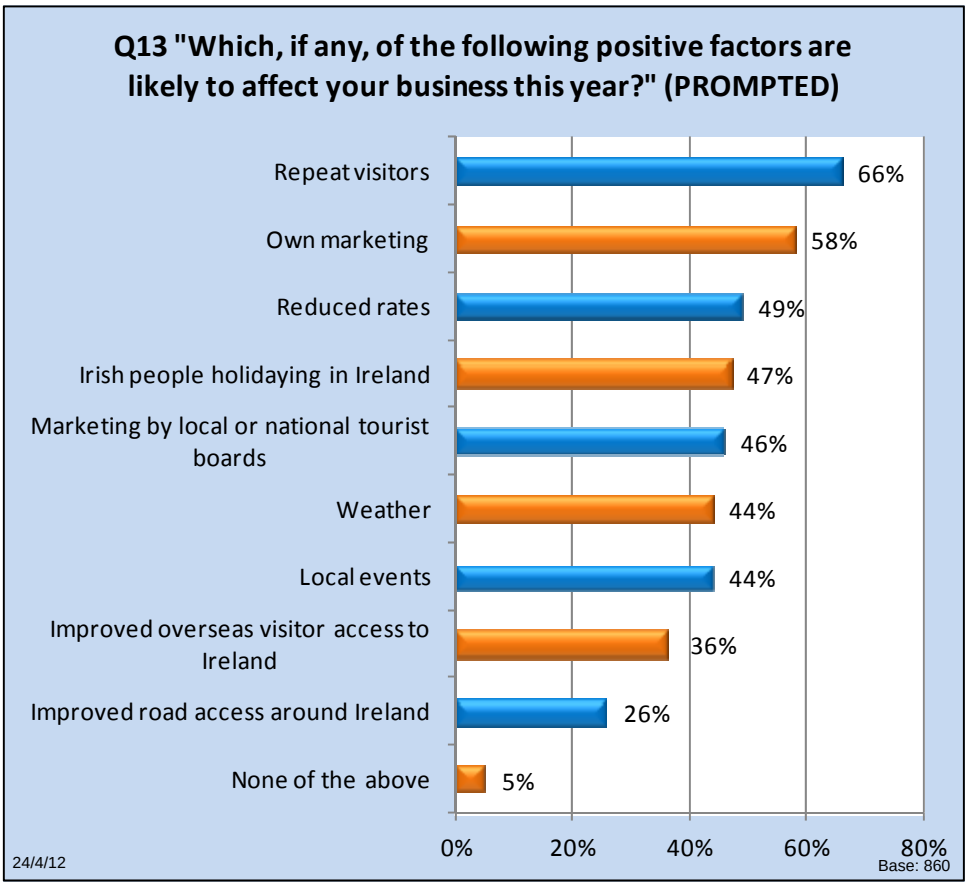


As many respondents (around half) do not employ any staff (other than the proprietors), base numbers for the employment questions are low and so results are grouped overall. In any case, differences in results by sector are not particularly significant.

Full time staffing levels slightly down in 2012

9.1 The majority of businesses expect to maintain staffing levels in 2012. However, profit margins in the industry are being squeezed significantly by falling prices and rising costs, and this is inevitably taking its toll on staffing levels for some businesses.

10. Positive Factors in 2012



Repeat visitors remain the most frequently mentioned positive factor

10.1 Two in three (66%) respondents say that repeat visitors are a positive factor likely to affect their business in 2012. This was also the most frequently mentioned positive factor in 2011. During challenging economic times, this particular visitor group is invaluable.

"I would say that about 70% of our business is repeat trade, but we do find it difficult bringing in new customers"
Self-catering

Marketing by businesses and tourist boards

10.2 Many businesses have commented on the importance of their own marketing and marketing undertaken by local and national tourist boards. Online marketing in various forms and the offering of different events and activities have paid dividends for some operators.

"A new website showing many more outdoor opportunities for overseas visitors especially"
Guesthouse

"We add specials to our website on a regular basis and this seems to boost business"
B&B

"We offer many freebies – archery, music lessons, free bikes, kites, canoe, garden games etc"
B&B

"We have had great results from Facebook offers"
Self-catering

"Social media, including Twitter and Facebook, seem to bring in more business for us"
Hostel

"Tourism Ireland seem to be doing a good job overseas for us!"
B&B

Reducing rates to maintain or increase visitor volumes

10.3 The positive visitor volumes discussed earlier in some sectors are largely coming at the expense of reduced rates.

"Offering very cheap deals has increased business"
Hotel

Volvo Ocean Race and the Titanic

10.4 Nearly half (44%) of respondents state 'local events' as a likely positive in 2012. Recent or upcoming events include the Volvo Ocean Race (finishing in Galway in July) and the 100th anniversary of the Titanic. Some call for more events to boost tourism.

"We need more events every year. We should try and host a major event, musical, sporting, arts – every month"
Guesthouse

"The Volvo sailing event should have a big impact on visitor levels, so we are looking forward to that"
Guesthouse

"The year of the Titanic in Cobh"
B&B

"The whole Titanic thing seems to have encouraged people over here"
Hostel

"We have a sister hotel situated near a popular event spot, so when there's an event on we get a lot of bookings we wouldn't normally get when the sister hotel is full"
Hotel

Impact of the Olympics?

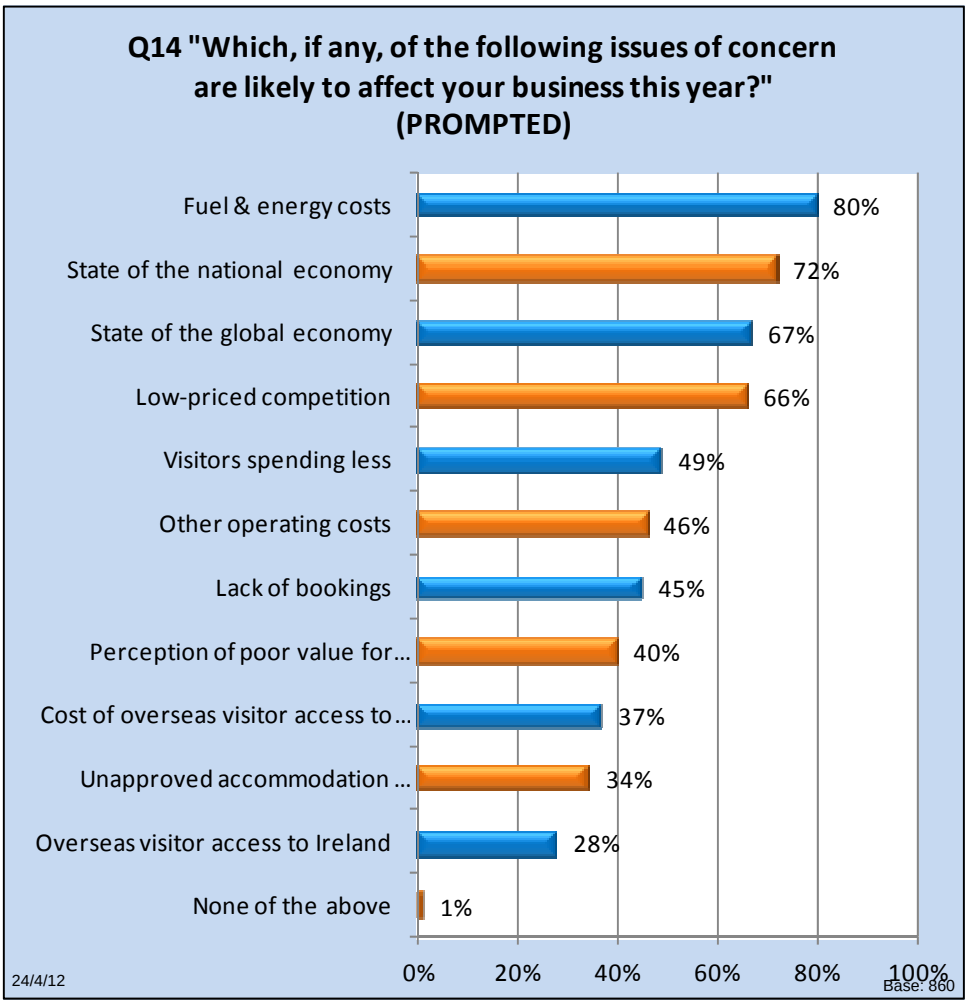
10.5 Several comments have been made about the impact of the London Olympics this year. Opinions differ on whether it will have a significant impact on Ireland or not and for what reasons; the truth seems to be that no-one really knows yet.

"Huge visitor numbers to UK for Olympics may result in some coming over to Ireland"
B&B

"We believe that those travelling from China, Japan and America etc will ... visit the Republic of Ireland too"
Attraction

"Avoiding the Olympics in London might drive tourists to Dublin"
Attraction

11. Issues of Concern in 2012



Fuel and energy costs – the most common concern

11.1 Four in five (80%) respondents state 'fuel and energy' costs as an issue of concern in 2012. This is the most frequently mentioned concern.

"Fuel and energy costs are one of our biggest problems, partly because our rooms are now generating less profit"
Hotel

"I think one of the biggest problems is the cost of fuel in Ireland, which could put people off travelling around the country"
Guesthouse

Global and national economies – mixed views

11.2 The state of the global and national economies continues to concern many operators, although some believe that the tide is slowly turning.

"The Irish government seem to have more direction recently with regard to solving the problems in Ireland"
Caravan park

11.3 It is also worth noting that harsh economic times are not necessarily a bad thing for some operators, as holidaymakers seek cheaper types of accommodation.

"The national economy has had a positive effect on our business as more people are camping/caravanning rather than spending more on a hotel"
Caravan park

Low-priced competition – the most significant worry for many

11.4 Although more respondents have ticked other concerns such as fuel & energy costs and the state of the economy, open comments show that low-priced competition is probably the most significant concern of all in the industry. Many operators in the PSA sector comment on being on the brink of having to give up the business for this reason.

Perception of value for money in Ireland – still poor, or improving?

11.5 Two in five (40%) respondents have stated 'perception of poor value for money in Ireland' being a concern in 2012, but this is a little lower than when the same question was asked in December 2011 (49%). A number of comments suggest that perception is improving.

"I think people in Ireland have realised that they can't charge what they want anymore and prices have become more competitive, so the perception that there is poor value for money here is really changing for the better"
Self-catering

"I think the perception of poor value for money in Ireland has dropped and as a result we are getting more people from Europe and America. Plus Irish pubs and restaurants have been putting on good deals, which makes visiting them seem like better value for money"
Hostel

Overseas visitor access to Ireland

11.6 There have been changes recently, both positive and negative, in terms of overseas access to Ireland. On the positive side, there are new routes into Knock airport from mainland Europe. This is having a very positive effect on businesses based in the area.

"New access routes from France, Germany, Italy and Spain to Ireland West airport, Knock"

Self-catering

"Flights from Düsseldorf and France coming to Knock"
Attraction

11.7 On the other hand, the continued lack of flights into Shannon airport is a major concern to businesses further south down the west coast of Ireland.

"The decrease in US capacity is worrying – Shannon's under-performance is a big factor on numbers in the west"
Hotel

"The decrease in the amount of flights to and from Shannon airport has a huge impact on tourism business in the region"
Guesthouse

11.8 The loss of the Cork-Swansea ferry is a significant blow to some businesses in the south west, especially caravan sites, which rely on visitors from Britain bringing their caravans over on the ferry. Some comments have also been made again about the cost of ferry travel.

"The loss of the Cork ferry resulted in cancellations for both early and main season"
B&B

"Sky high ferry prices ... as expat Britons who travel back regularly with a caravan and from feedback from our customers & friends in the UK we know this is a huge barrier to people coming 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 first 2012 wave took place between 2nd and 20th April. 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
- 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 3,272 usable contacts (i.e. not opted out) for the survey spread across eight industry sectors (discussed under 'sampling' below). An email was sent on 2nd April 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 769 responses were received to the online survey – a response rate of 24%.

12.8 Following this, we conducted 91 '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 Both the telephone and the online surveys were brought to a close on 20th April.

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	126	10	136
Guesthouses	64	8	72
Bed & Breakfast	387	-	387
Self-catering	37	24	61
Caravan / campsites	26	12	38
Hostels	34	19	53
Attractions	79	9	88
Golf clubs	16	9	25
Total	**769**	**91**	**860**

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
- Bed & Breakfast Ireland
- Irish Boat Rental Association
- Restaurants Association of Ireland
- Irish Ferries
- Coach Tourism and Transport Council
- Irish Caravan and Camping Council
- Car Rental Council

Tourism Barometer - April 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 ..... ❑

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

(GOLF CLUBS) 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 Q13

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 average room yield 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 Ireland 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 expect the volume of your overall business to perform during Easter compared to Easter last year? (*N.B. If you are completing this after Easter, how did your business perform during Easter?*)**

Up on Easter 2011 ..... ❑
Same as Easter 2011 ..... ❑
Down on Easter 2011 ..... ❑
Don't know ..... ❑
Not applicable ..... ❑

Q9 **How do you expect 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 ..... ❑

Q10 **How do you expect 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	❑	❑	❑	❑	❑

Q11 **How do you expect the volume of your overseas 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	❑	❑	❑	❑	❑

Q12 **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 staff	❑	❑	❑	❑	❑
Part time staff	❑	❑	❑	❑	❑
Seasonal staff	❑	❑	❑	❑	❑

Q13 **Which, if any, of the following positive factors are likely to affect your business this year? (PLEASE TICK ALL THAT APPLY)**

- *Weather* ..... ❑
- *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* ..... ❑

Are there any other positive factors likely to affect your business this year which you would like to comment on?

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Q14 **Which, if any, of the following issues of concern are likely to affect your business this year? (PLEASE TICK ALL THAT APPLY)**

- *Low-priced competition* ..... ❑
- *Fuel and energy costs* ..... ❑
- *Other operating costs* ..... ❑
- *State of the national economy* ..... ❑
- *State of the global economy* ..... ❑
- *Perception of poor value for money in Ireland* ..... ❑
- *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* ..... ❑

Are there any other issues of concern likely to affect your business this year which you would like to comment on?

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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.

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