STRATEGIC MARKETING

Fáilte Ireland
National Tourism Development Authority

Tourism Barometer

September 2011

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1. Headline Findings

Background to the Tourism Barometer

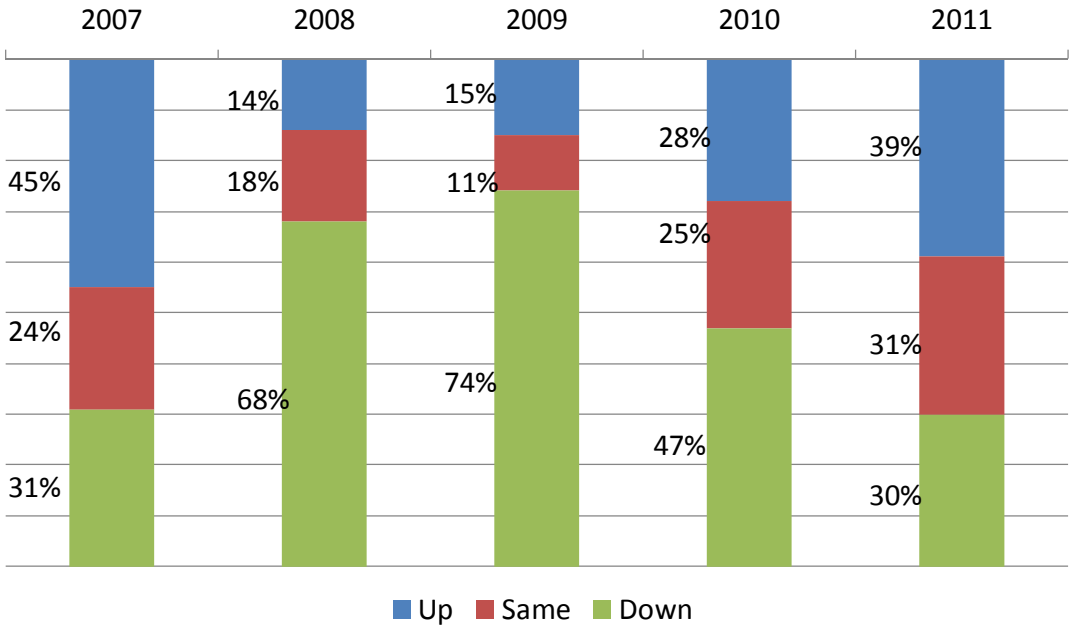
The Fáilte Ireland Tourism Barometer is a survey of tourism businesses designed to provide insight into tourism performance for the year to date and prospects for the remainder of the season.

We received 934 responses to an online survey and conducted 126 telephone interviews with tourism businesses between 5th and 20th September 2011. We also conducted seven depth interviews with senior industry executives. More details on the methodology can be viewed in appendix 1.

Increasing confidence in 2011 tourism performance

1.1 2011 is proving to be something of a transitional year for Irish tourism, as confidence with tourism performance in 2011 has returned to levels last seen in 2007. Four in ten (39%) respondents to the survey expect overall business levels in 2011 will be up on last year, with just three in ten (30%) anticipating declines. This is consistent with levels last recorded in September 2007 and is ahead of similar findings recorded in the intervening three years.

Business Sentiment Index 2007 – 2011
Base: Accommodation Providers (*weighted to available bedspace)*



Visitors levels up slightly in hotels and attractions

1.2 Visitor levels year to date are most positive in hotels (49% of businesses reporting an increase) and attractions (41% reporting an increase). The estimated increase in year to date visitor volumes is 2% in each of these two sectors.

B&B sector still struggling

1.3 The picture is still very different in the B&B sector however, where about three in ten (29%) businesses report increased visitors, but about half (49%) report a decrease. The estimated year to date decrease in visitor volumes in the B&B sector is 10%.

Domestic market is the best performing market

1.4 The domestic market is clearly performing the best of all the key markets. In hotels, more than half (54%) report an increase in domestic volume, compared to less than one third reporting a decrease. Caravan & campsites also report healthy domestic visitor levels, with nearly half (47%) saying this market is up. Self-catering and Hostels are also up on last year on balance.

Performance of key overseas markets

1.5 Great Britain is a key overseas market but unfortunately it is not performing well this year. All sectors report a decrease in visitors, and the average overall change in visitors for the weighted paid serviced accommodation sector is minus 3%.

1.6 There is slightly more stability in the French, German and US markets. In the paid serviced accommodation sector there is no change in visitor levels from Germany, and the French and US markets are down 1% each.

Profit margins under severe pressure

1.7 Whilst visitor volumes are up for some sectors, profitability is down in all sectors except hotels, which are about level overall. The performance of the hotel sector however is probably coming at the expense of B&Bs (62% report reduced profitability) and guesthouses (54% report reduced profitability).

1.8 Financial matters dominate issues of concern, with about two in three (65%) operators giving the state of the economy as a key issue of concern, and over half (57%) stating low-priced competition and fuel and energy costs respectively. There is a feeling especially in the smaller serviced sectors that it is becoming increasingly hard work just to survive.

Repeat visitors holding up the industry

1.9 On the positive side, repeat visitors are proving to be invaluable in keeping businesses going during hard times. About half (47%) of respondents give repeat visitors as a key positive factor affecting their business this year.

Domestic market is the main hope for the remainder of the year

1.10 Expectations for the domestic market are reasonable for the remainder of the year, but all the key overseas markets of Great Britain, France, Germany and the USA are expected to be down. The global financial crisis and renewed media coverage of it is likely to be behind this.

2. Contextual Background to Quantitative Findings

Tourism hotspots are doing well; non-hotspots are not

2.1 There appears to be a clear distinction in performance between businesses in the tourism hotspots and those outside of the hotspots.

"The main population centres are doing well. Outside of the cities it's a different story"

Year was going well until the global economy began faltering again

2.2 2011 was looking good until negative reports on the global economy started up again. This has affected consumer confidence overseas and is likely to impact on overseas visitor levels for at least the remainder of this year.

"Everything was looking good until mid-August. Since then consumer confidence has fallen off a cliff"

"The first two quarters were good. People were getting excited. Now there are world economy worries again. Forward bookings are down for Q4"

No profit in the industry

2.3 The Irish tourism industry is still faced with the huge problem of overhanging debt. Banks want to get their money back so they are taking out what they can. Businesses which survive the tough conditions have little or no liquidity or profit.

Poor summer weather was unfortunate

2.4 There were strong hopes for the domestic market approaching the summer, but the poor weather hindered performance.

Reasons for British market declining

2.5 The British market has not performed well at all this year. Perceived reasons include the economic problems, promotion of 'staycations', ferry costs and the unfortunate perception that Ireland is over-priced

"We did ourselves a lot of damage between 2005 and 2007. It's a lot easier to acquire a reputation [for being expensive] than it is to lose it"

Overseas tour operator business is doing well

2.6 Key overseas tour operator business from the USA, France and Germany is up this year. This is in line with the finding that tourism hotspots are doing well.

"For the USA, a very positive year – double digit growth on 2010. Europe is good news also – double-digit growth for Germany and single-digit growth for France"

3. Visitor Volumes Year to Date

Overview of changes in visitor volumes to date by market

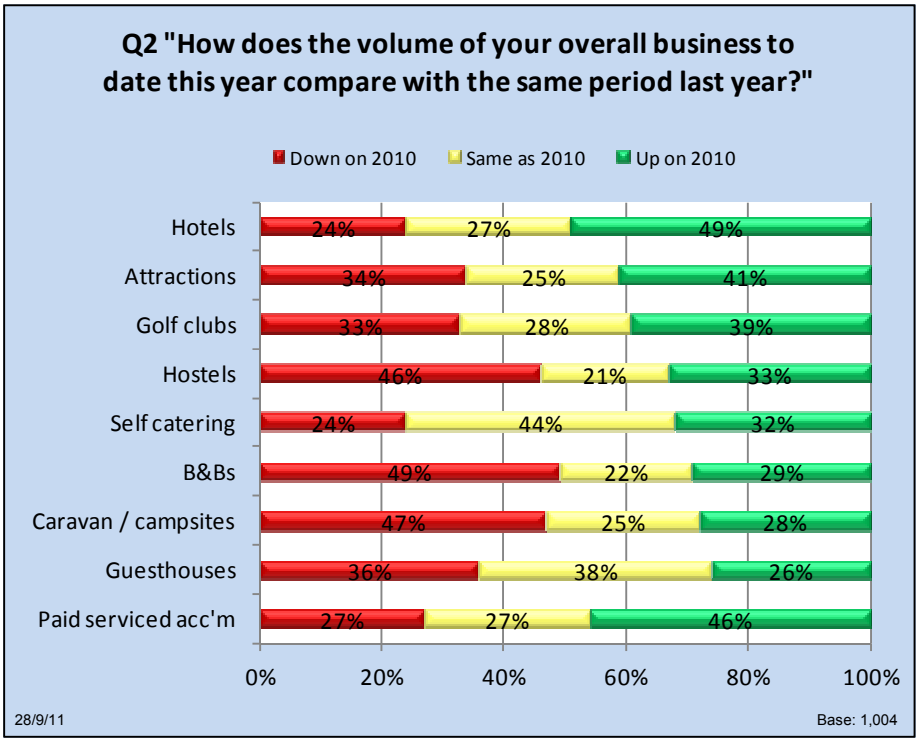
Paid Serviced Accommodation by Market						
% change in visitor levels	Overall	Republic of Ireland	Britain	France	Germany	USA
11% +	13%	12%	4%	4%	8%	14%
+6% to 10%	15%	16%	10%	7%	5%	13%
+1% to 5%	19%	20%	10%	9%	14%	13%
No change	27%	27%	37%	53%	43%	31%
-1% to 5%	8%	8%	12%	10%	14%	10%
-6% to 10%	8%	6%	12%	10%	9%	8%
-11% +	11%	12%	14%	6%	8%	10%
Average % change	**No change**	**No change**	**-3%**	**-1%**	**No change**	**-1%**

The above figures are based on paid serviced accommodation weighted by sector according to available bedrooms. Some respondents have stated that their visitor levels for particular markets are up/down but have been unable to quantify the increase/decrease. In these cases we have applied the average increase/decrease among those able to state an increase/decrease. Respondents stating an increase/decrease of more than 11% have been asked to specify the change, and this information is incorporated in the overall average % change.

3.1 Paid serviced accommodation is seeing a good degree of stability this year, with no overall change in the Republic of Ireland and German markets, and only the British market (-3%) has seen a notable decrease in visitor levels.

3.2 The stability is driven by the good performance in the hotel sector, whereas performance in the smaller sectors (guesthouses and B&Bs) is not at the same level, as discussed in the section below.

Overall visitor volumes to date by sector



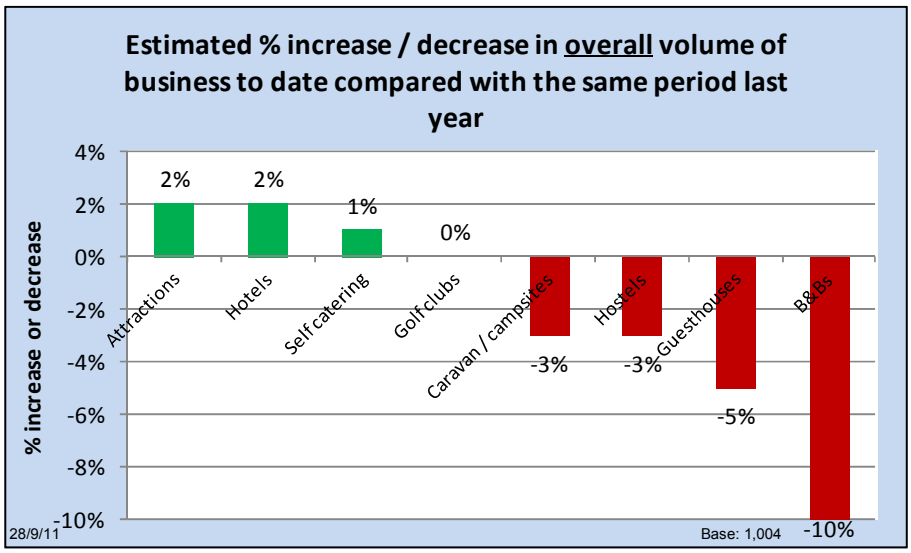
In all charts, 'don't know' or 'not applicable' answers to the question have been excluded and the percentages re-based. Results are split by sector and ordered by proportion answering an increase in numbers (shown in green).

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.

Top-line results show a slightly misleading picture

3.3 On the surface, results to the above question appear to show that some sectors are performing very well. However, in this research wave we have introduced new qualifier questions asking respondents who answered 'up' or 'down' to quantify the increase or decrease. Those qualifier questions have revealed that businesses which are up are usually just slightly up, whereas many of those which are down are well down.

3.4 The chart below shows our estimates of the change in overall visitor volumes by sector:



Attractions and hotels the best performing sectors

3.5 Visitor levels are up an estimated 2% in the attractions and hotels sectors.

"We had a very good summer – the best in 4 years"
Hotel

"2011 has seen a renewal in volume of traffic into Ireland"
Hotel

"Very positive so far. Hope the trend continues to year end"
Attraction

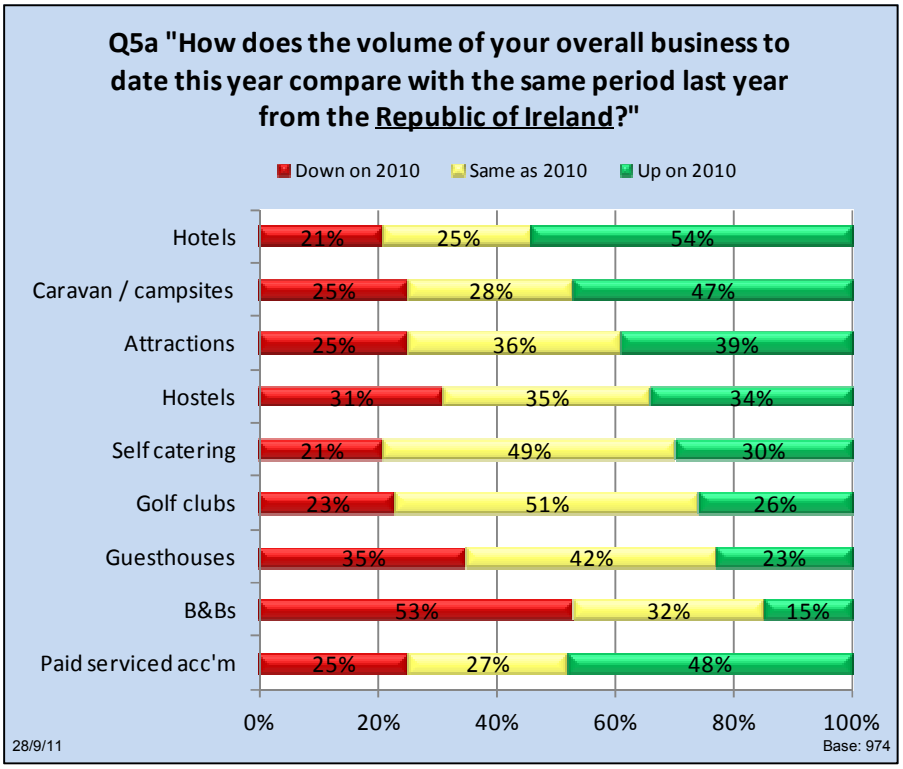
Smaller serviced sectors struggling

3.6 The smaller serviced sectors of guesthouses and B&Bs have seen an estimated reduction in volumes of 5% and 10% respectively. One of the main reasons given is the continued competition from NAMA and bank-funded hotels selling rooms at rates they can't compete with.

"There's a 4 star hotel advertising rooms from €59. How do we compete with those rates
Guesthouse

"In the low season hotels are selling rooms below cost. B&B's cannot compete with this. Most B&B's barely manage to break even in the present state of the economy."
B&B

Domestic visitors by sector



3.7 The domestic market is easily the best performing key market this year, with businesses in most sectors reporting increased volumes. More than half of hotels report increased business with only one in five reporting a decline.

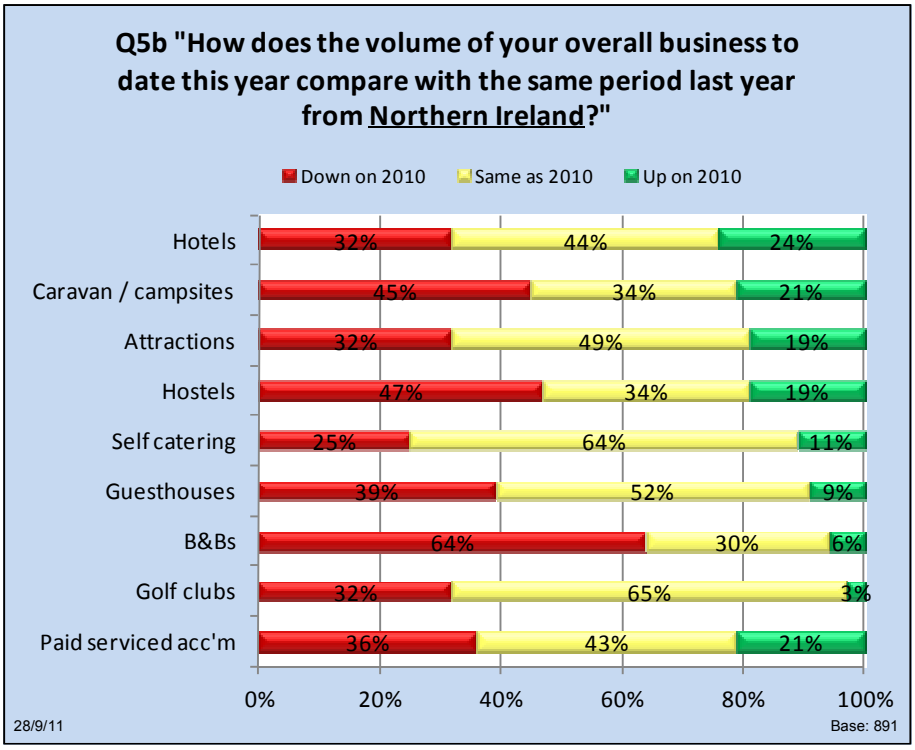
Caravan & campsites and Self-catering have benefited from domestic visitors

3.8 About half (47%) of caravan & campsites have seen increased domestic visitors this year as more new campers have emerged. The visitor numbers may well have been much better had it not been for a cold and wet summer. Self-catering operators are also up on last year on balance.

"More new campers, especially family tents, less Irish going overseas with motor homes"
Caravan park

"Due to our location the big negative impact for us this year is weather ... early indications for the season were very encouraging"
Caravan park

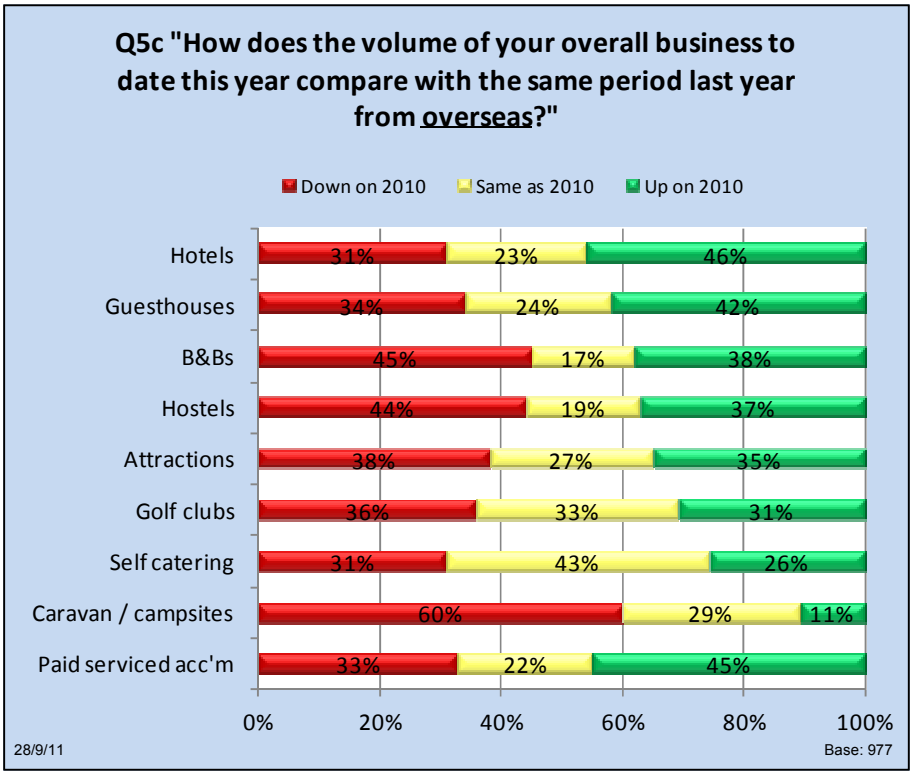
Visitors from Northern Ireland by sector



Northern Ireland market is significantly down

3.9 The May research wave revealed that the Northern Ireland market was significantly down year to date, and September results have confirmed that 2011 is definitely a poor year for this market.

Overseas visitors by sector



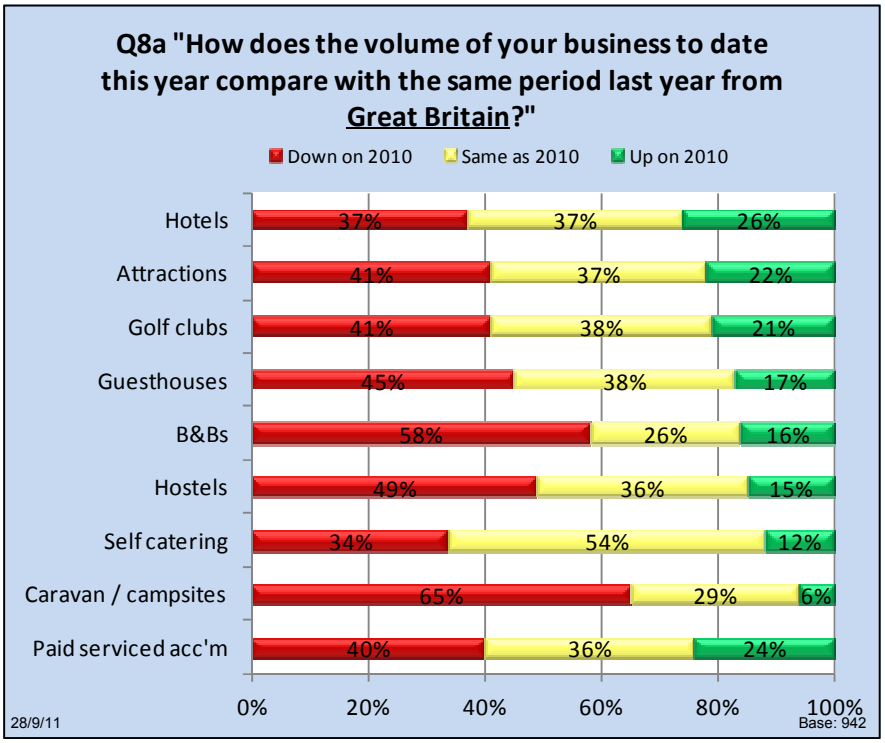
Overseas visitors vary by sector

3.10 Volumes of overseas visitors differ by sector, with hotels seeing the most positive increase.

"Overseas visitors are up year to date"
Hotel

Visitors from Great Britain by sector

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



Visitors from Britain down in every sector

3.12 Britain is a key overseas market but unfortunately it is not performing well at all this year. Every sector has reported a decrease in British visitors.

"While Irish visitor numbers are up, the British tourist hasn't materialised
B&B

"Sterling rate has affected us as it means our holidays look more expensive in the UK although we fixed the price and reduced the tax rate"
Self-catering

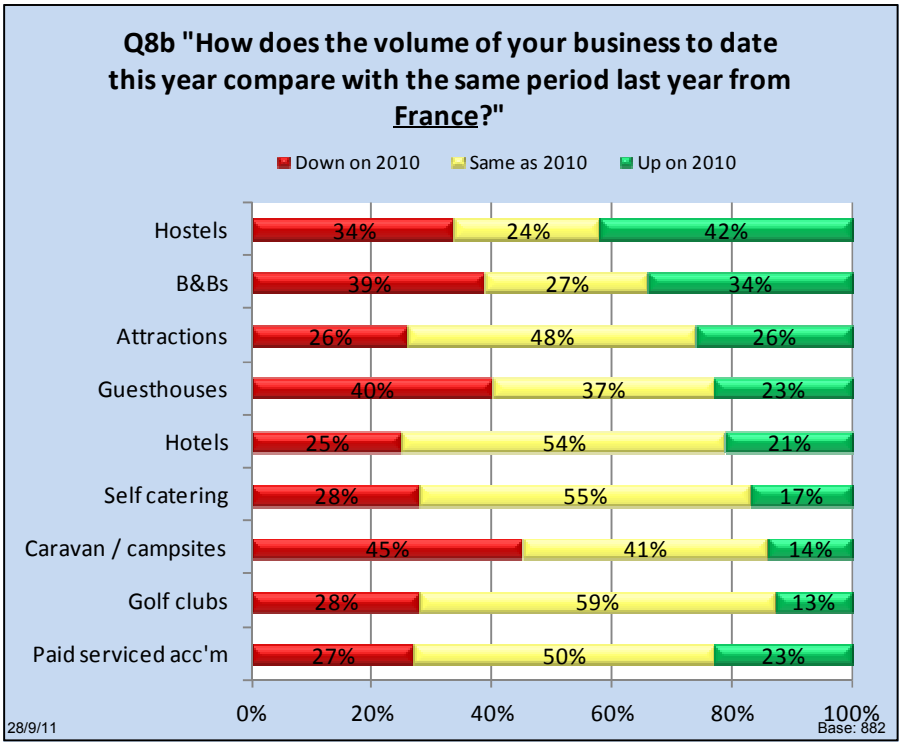
Unfortunate label of 'rip-off Ireland'

3.13 Unfortunately Ireland appears to be suffering from a perception among the British of being heavily over-priced. It could take some years to shake off this reputation. The decline in the British market is concerning for many operators, and there are calls for trying to bring the British back.

"Irish prices in general are perceived as being too high"
B&B

"UK market is a worry – we seem to have lost out considerably due to their own recession and the fact that they are looking towards Spain etc., rather than Ireland"
Attraction

Visitors from France by sector

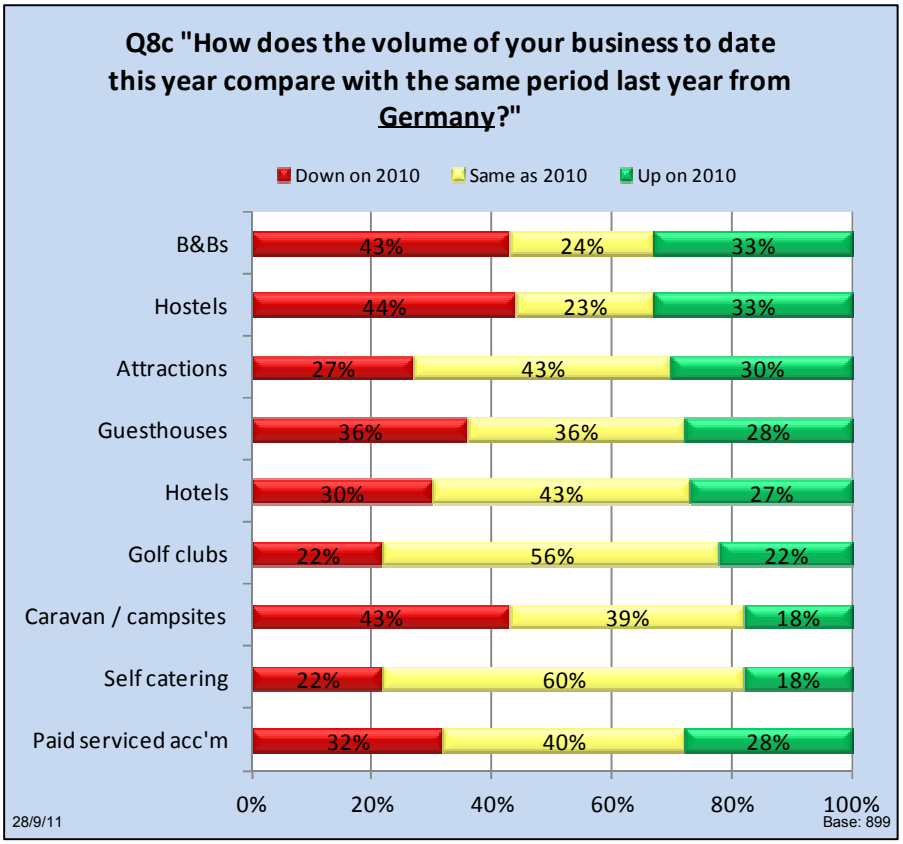


One of the more stable markets at the moment

3.14 The French market is performing better than other key overseas markets such as Britain. Feedback from visitors is positive about Ireland.

"The French who visited loved this country and all want to come back"
B&B

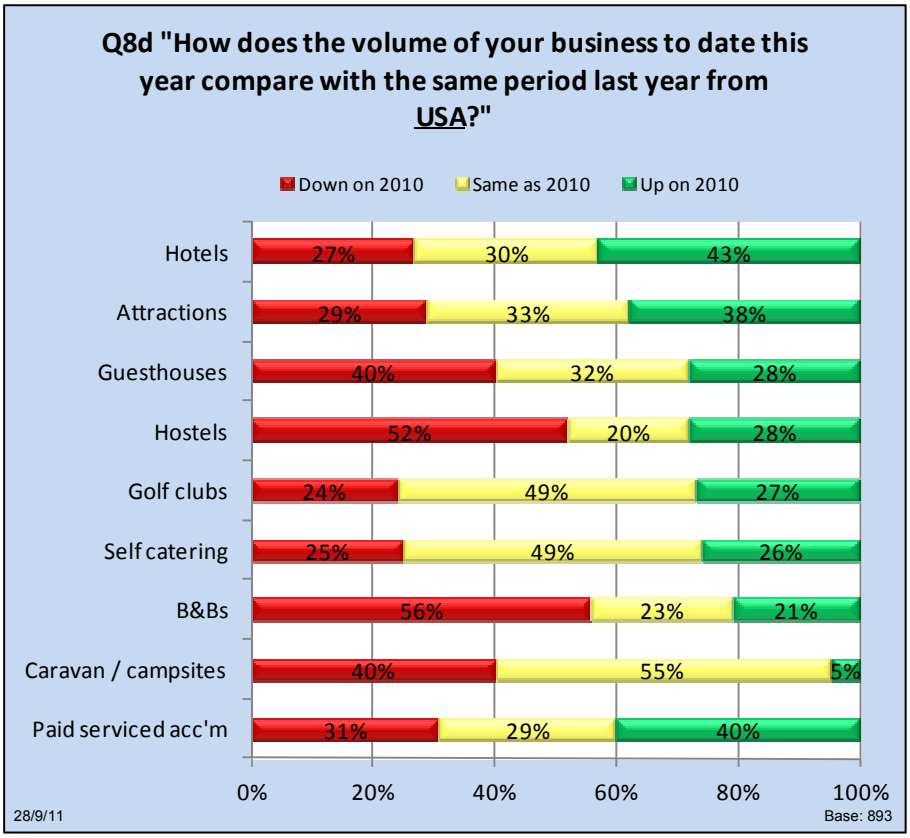
Visitors from Germany by sector



Variation in feedback

3.15 Feedback on the German market varies; the overall picture is quite mixed. In all sectors a majority report German business as either up or on a par with last year, while visitor attractions are slightly up on balance.

Visitors from USA by sector



American market is up for hotels

3.16 Over two in five (43%) hotel operators report an increase in visitors from the USA. Other accommodation sectors do not report the same position.

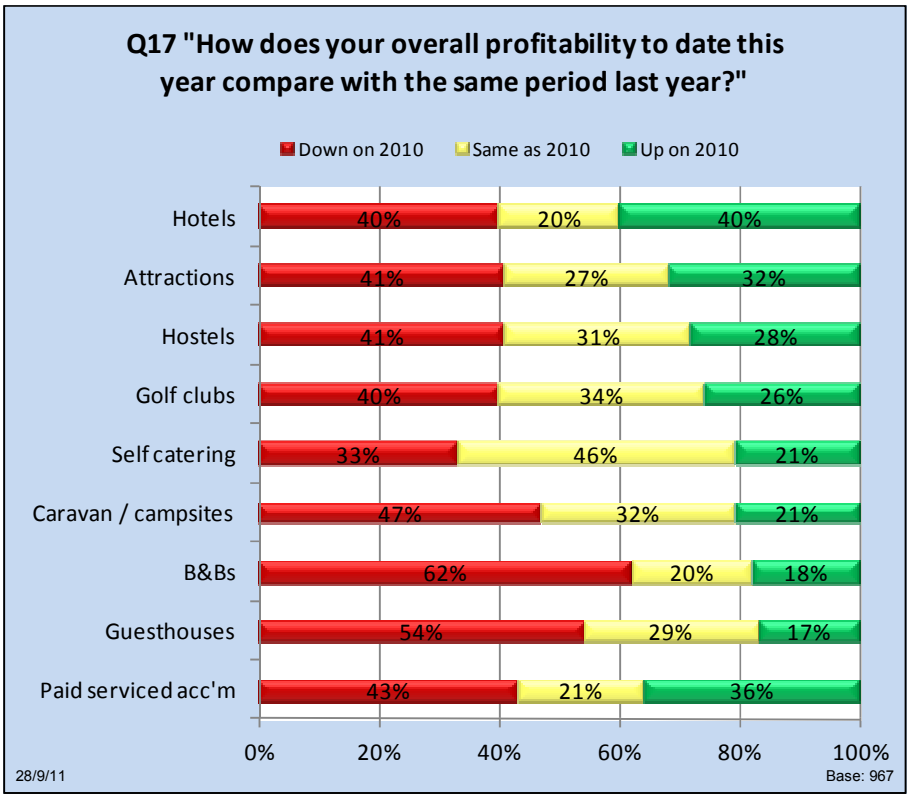
"This may be a temporary spike in US recovery as we hear most guests being skittish about prospects for continued recovery in the USA"
Hotel

3.17 US visitor levels are relatively healthy in the hotel sector, but the picture is very different in the smaller serviced sectors with guesthouses and B & Bs reporting significant declines.

"US business has collapsed for me"
B&B

4. Profitability and Average Room Yield

Profitability



Profitability is down in every sector except hotels

4.1 Whilst visitor volumes are up in some sectors, profitability is down in all sectors except hotels. Fierce price competition is affecting revenue, whilst profit margins are also being squeezed at the other end by rising operating costs. These issues are discussed fully in section 8 (Issues of concern affecting businesses).

"There is still huge pressure to manage and cap operating costs to achieve any reasonable level of profit"
Hotel

Toiling to make ends meet

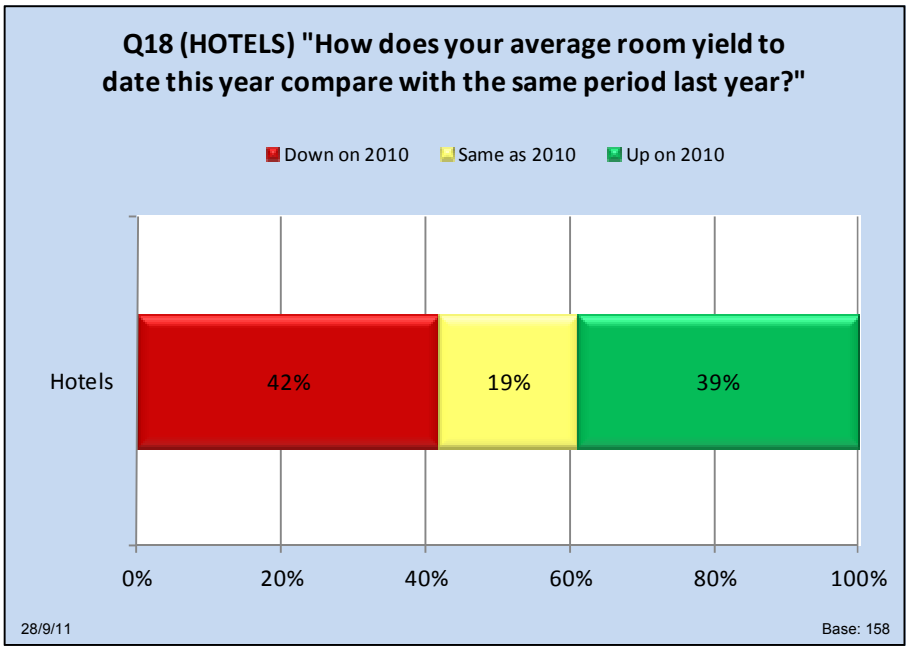
4.2 A number of operators comment that the job is becoming increasingly hard work just to make ends meet.

"Business this year to date has been good overall. We are on target to meet a projected sales increase of 10%, however revenue is not up correspondingly, so in other words we are working harder for the same money"
Hostel

"As a small business the owners have to work harder and harder and do longer hours to survive"
Guesthouse

"Had to work harder and provide added extras in order to keep the same level of business as last year"
Attraction

Average room yield



The above question has only been asked of hotel operators

4.3 Visitor levels are up on 2010 for about half (49%) of hotels, whereas average room yield is only up for about two in five (39%).

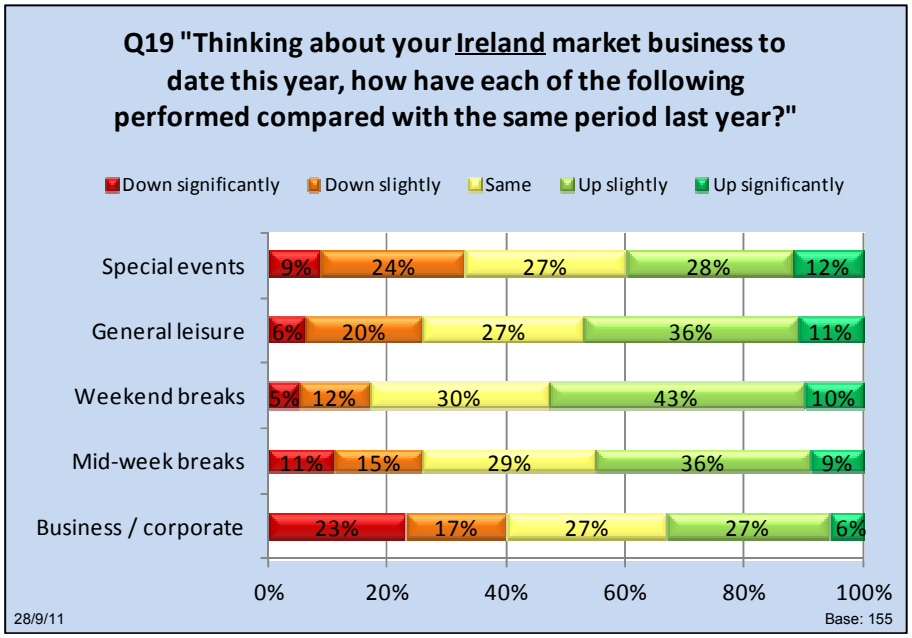
4.4 Aggressive pricing by NAMA or bank-owned hotels is still a major issue of concern for hotels with other types of ownership as the industry deals with over-supply (discussed in more detail in section 8 later). It is possible for other hotels to compete, but this could ultimately have a negative affect on quality because there is no money left over for investment in the product.

"Nama and other bank-run hotels, and golf courses, are charging lower prices, and yet can still afford to maintain their business. There is anecdotal evidence

that they are the only hotels spending money on carpets, curtains etc. The losers in the end will be the smaller family run businesses"
Hotel

"The cost of doing business is too high and there is unfair competition putting downward pressure on room rates, wedding prices, and conferences. There are too many hotels, and particularly too many hotels offering below cost rates. I believe that the hotel product is becoming 'run-down' because the rates being offered do not allow for refurbishment and improvements"
Hotel

5. Types of Booking – Hotels (Ireland Market)



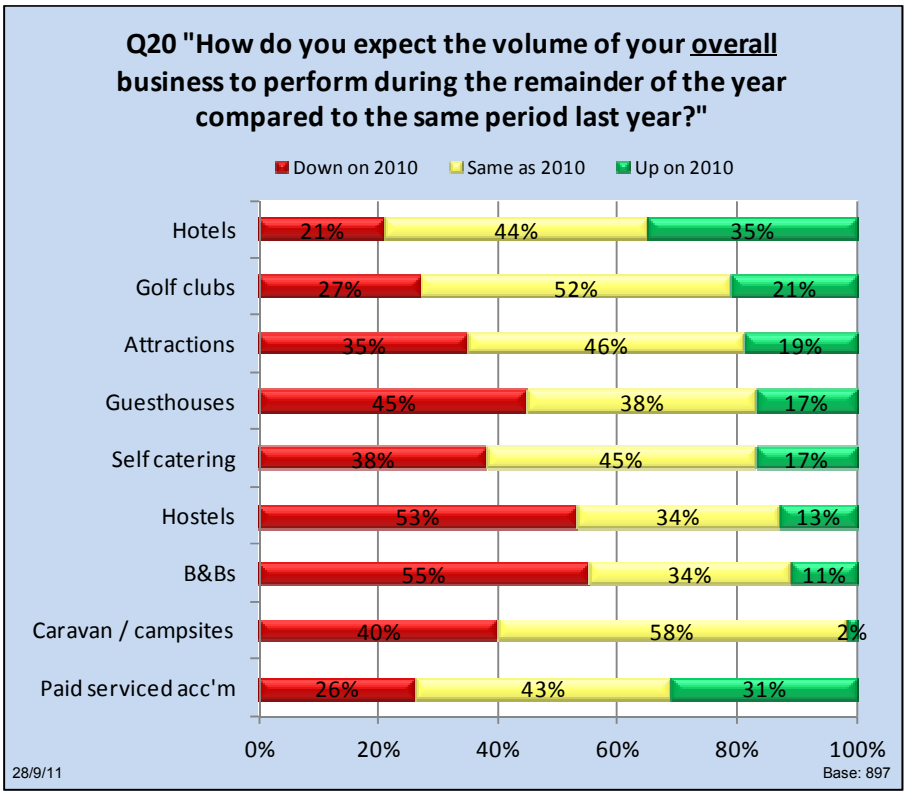
The above question has only been asked of hotel operators and refers to the Ireland market only.

Weekend breaks performing well

5.1 Over half (53%) of respondents report that weekend breaks are up on last year with less than one in five (17%) saying that business is down, while the remaining domestic segments other than Business/Corporate are ahead of last year on balance.

6. Expectations

Overall expectations



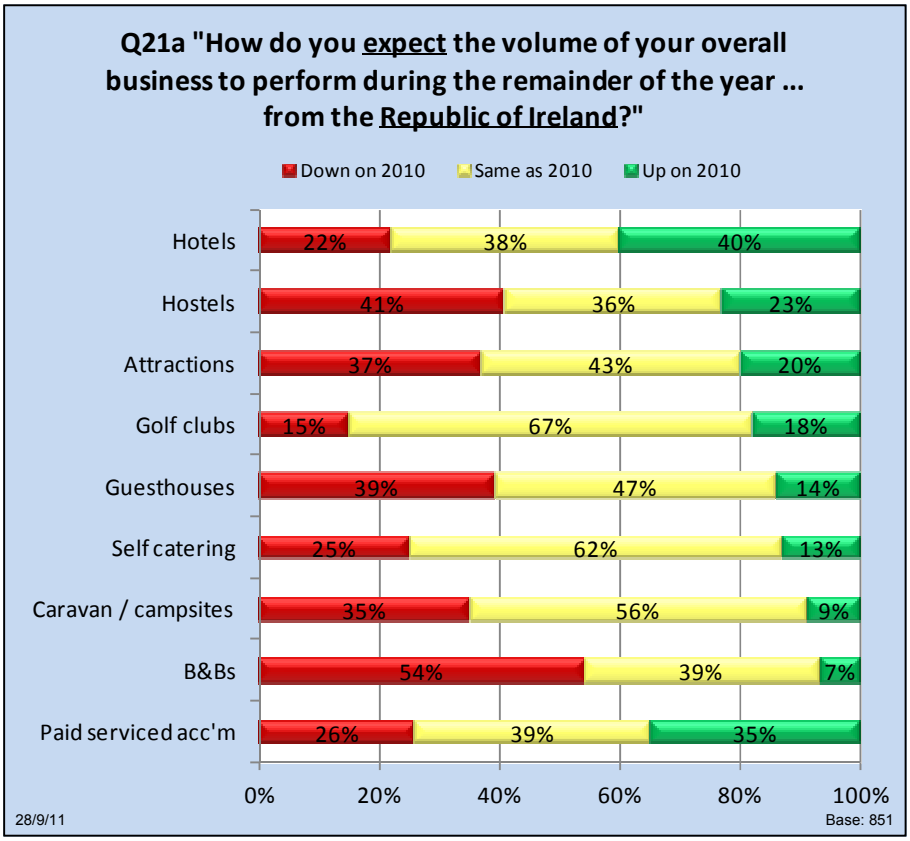
Outlook is not optimistic except for hotels

6.1 The hotel sector seems to be the only significant source of optimism at the moment. Expectations in the tourism industry do tend to be seasonal (even though the question asks for comparison against the same period), but nevertheless, the outlook for the remainder of the year isn't positive at the moment.

"With the horrible weather coming in now and the holiday season being over, we expect to have a very quiet autumn/winter, although we are running a lot of promotions and special offers to try and raise our bookings and turnover"
Guesthouse

"There is so little money around. I think things are getting worse since the end of the summer. There is huge uncertainty out there"
B&B

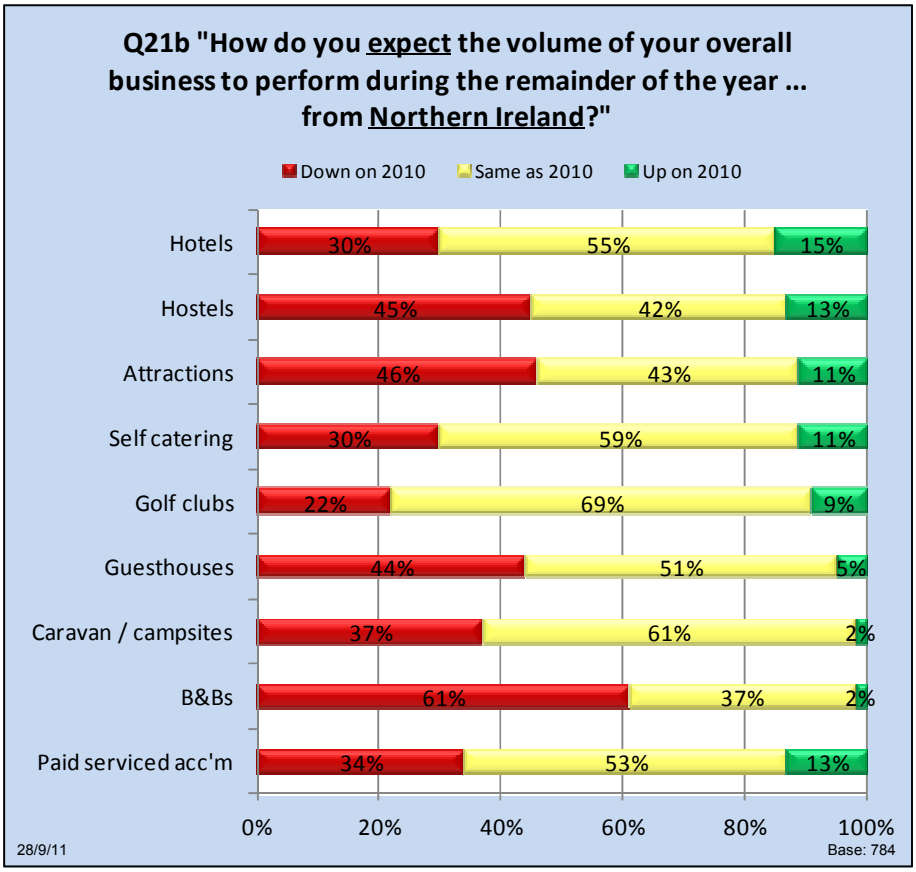
Domestic expectations



Hopes for a stable domestic market

6.2 The domestic market has given the industry the most stability in 2011, and hotels are looking hopefully to Irish visitors again. All other sectors are circumspect regarding prospects for domestic growth with B & B owners feeling particularly negative.

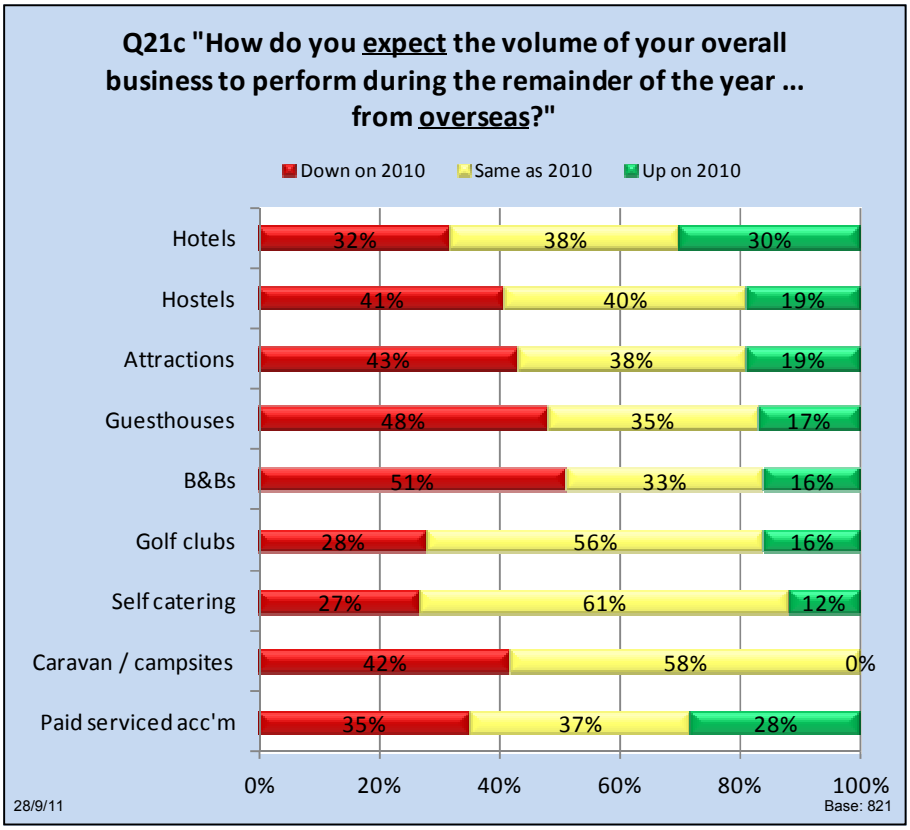
Northern Ireland expectations



No improvement from Northern Ireland

6.3 Visitor levels from Northern Ireland are significantly down this year, and on the whole, this market is not expected to pick up in 2011.

Expectations from overseas

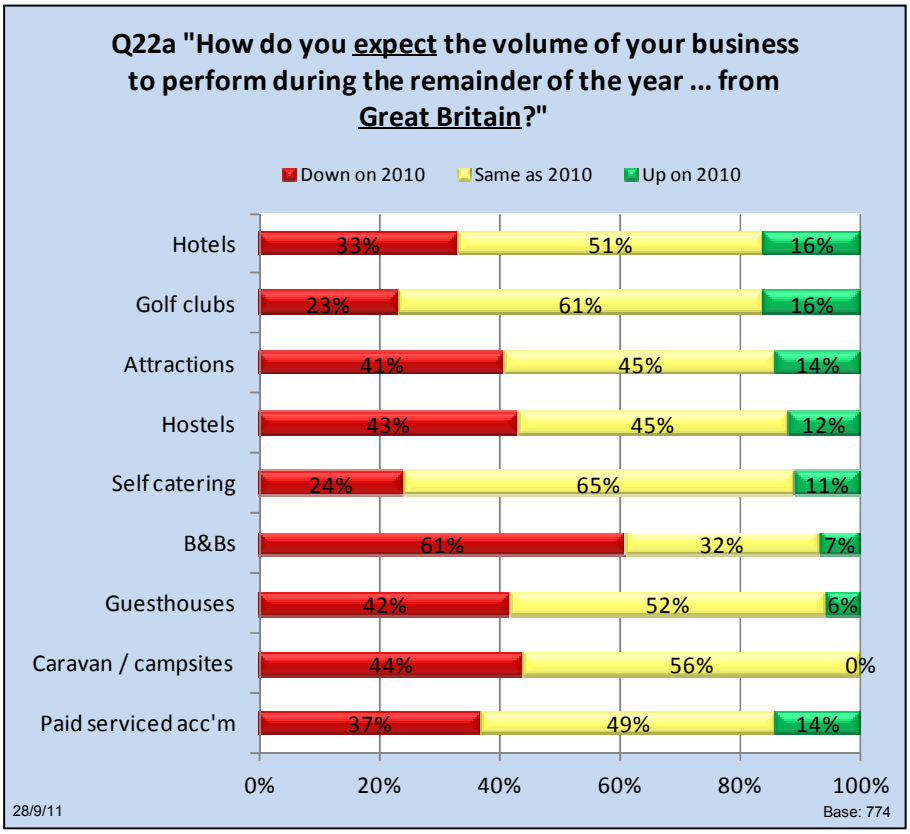


Global economic problems re-occurring

6.4 For a time, the world economy was showing signs of recovery, but since around mid-August the outlook has gone significantly downhill again. Consequently there is limited expectation of healthy overseas visitor levels over the coming months other than in the hotel sector where proprietors hope to almost match last year's levels.

Expectations for Great Britain

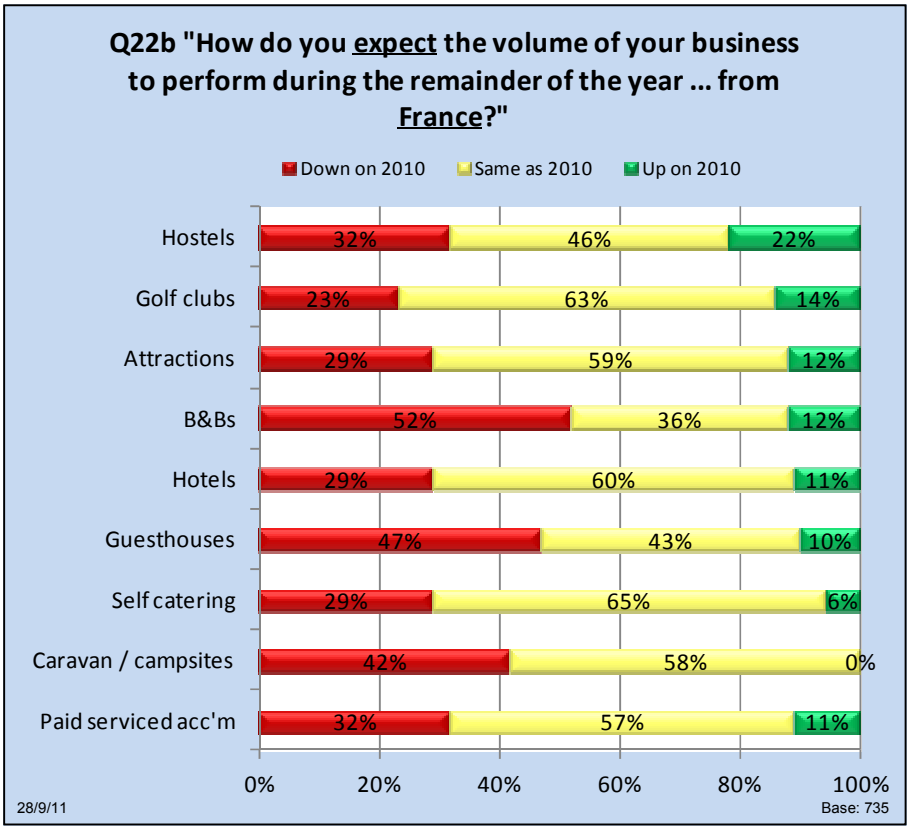
6.5 Charts now show the overseas visitor volumes by key individual markets, starting with Great Britain below.



No recovery soon from Great Britain

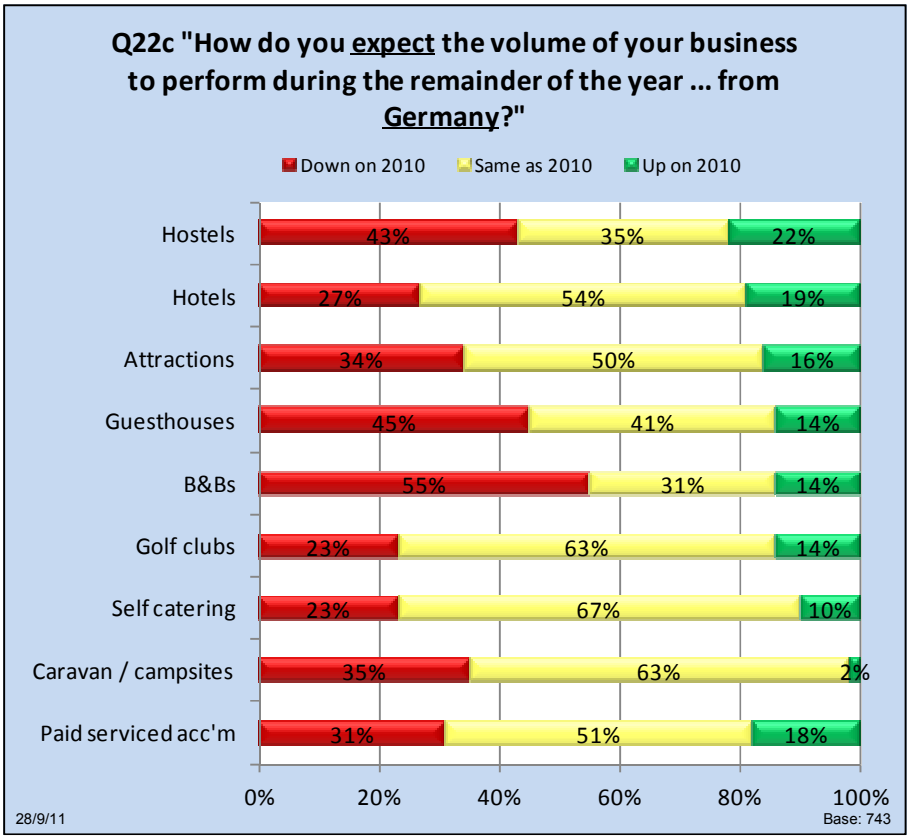
6.6 The British have been staying away this year. This trend is not expected to reverse before the end of 2011.

Expectations for France



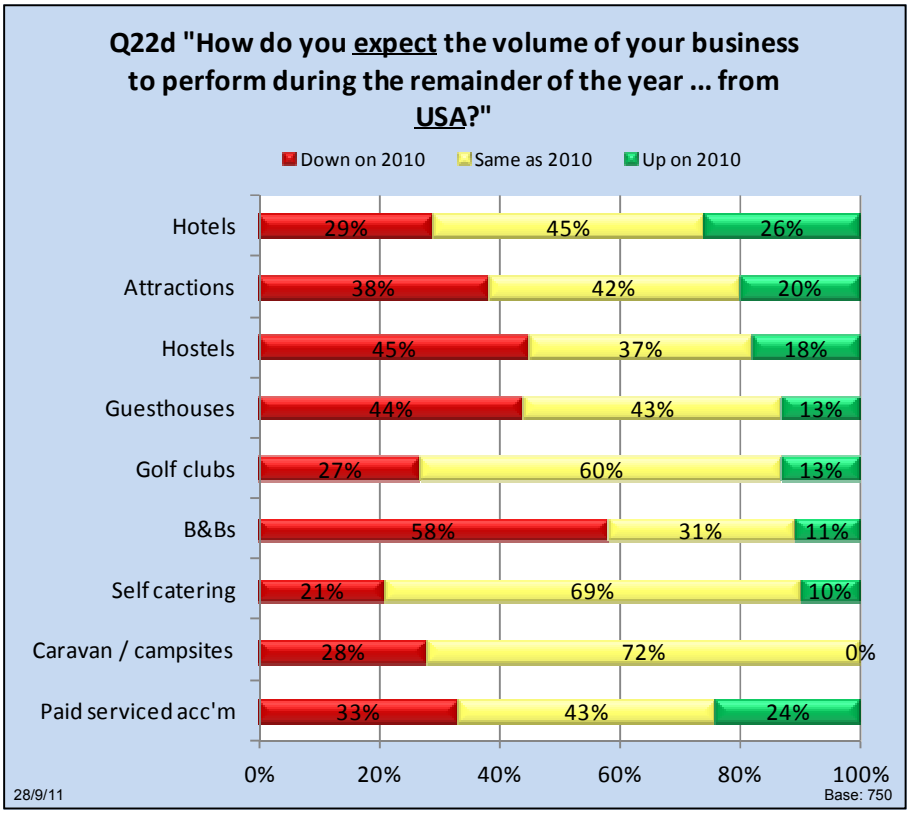
6.7 Whereas France has been one of the better performing overseas markets this year, expectations for the remainder of the year are not high, with all sectors expecting the market to be down on last year on balance.

Expectations for Germany



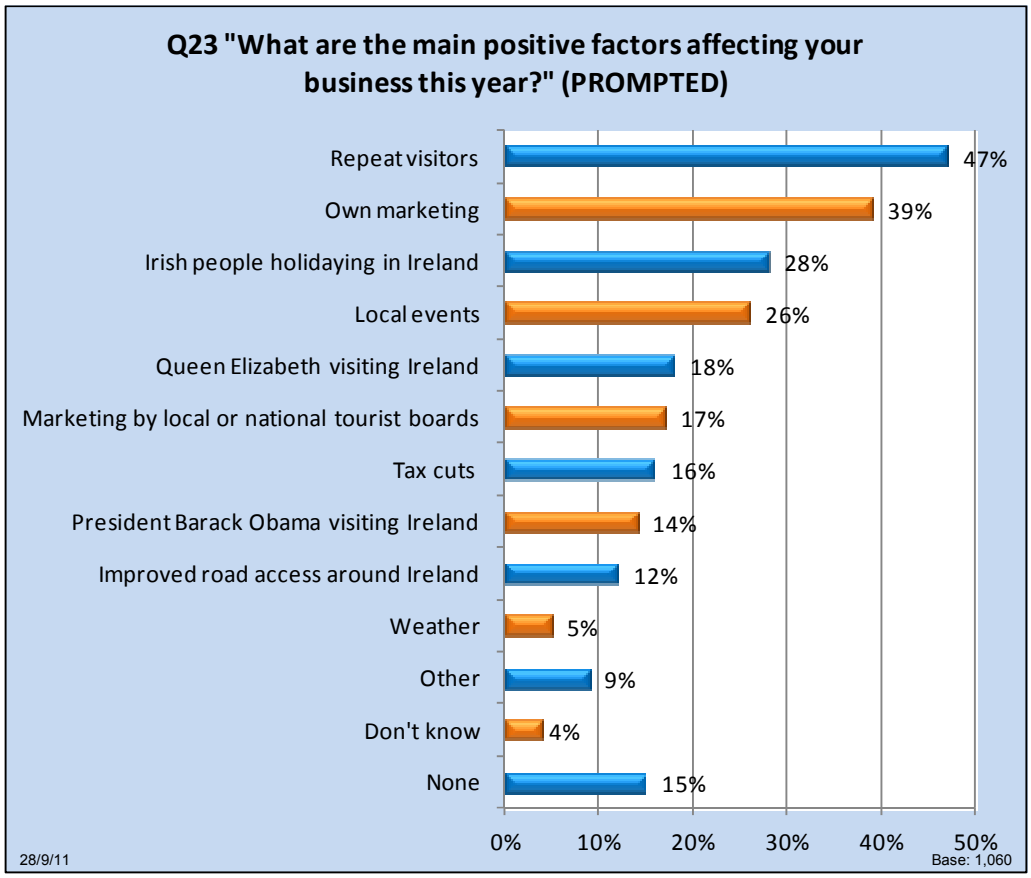
6.8 The outlook for the German market is similar to that of the French market – a reasonable performance so far in 2011 but growth is not expected.

Expectations for USA



6.9 Expectations for the US market had been quite high earlier this year. However, the economic recovery seems to be faltering again, and expectations have been diminished. Relatively, hotels remain the most optimistic but their expectation is marginal.

7. Positive Factors Affecting Business



Repeat visitors – the bedrock during difficult times

7.1 Nearly half (47%) of respondents state repeat visitors as a key positive factor affecting their business this year. It is clear from comments that this is the visitor group which keeps struggling businesses going during difficult times.

"My business this year is mostly return business or referrals. Very little new business"
B&B

Own marketing

7.2 Own marketing is a positive factor for about two in five (39%) respondents, while marketing by local or national tourist boards was mentioned by 17%.

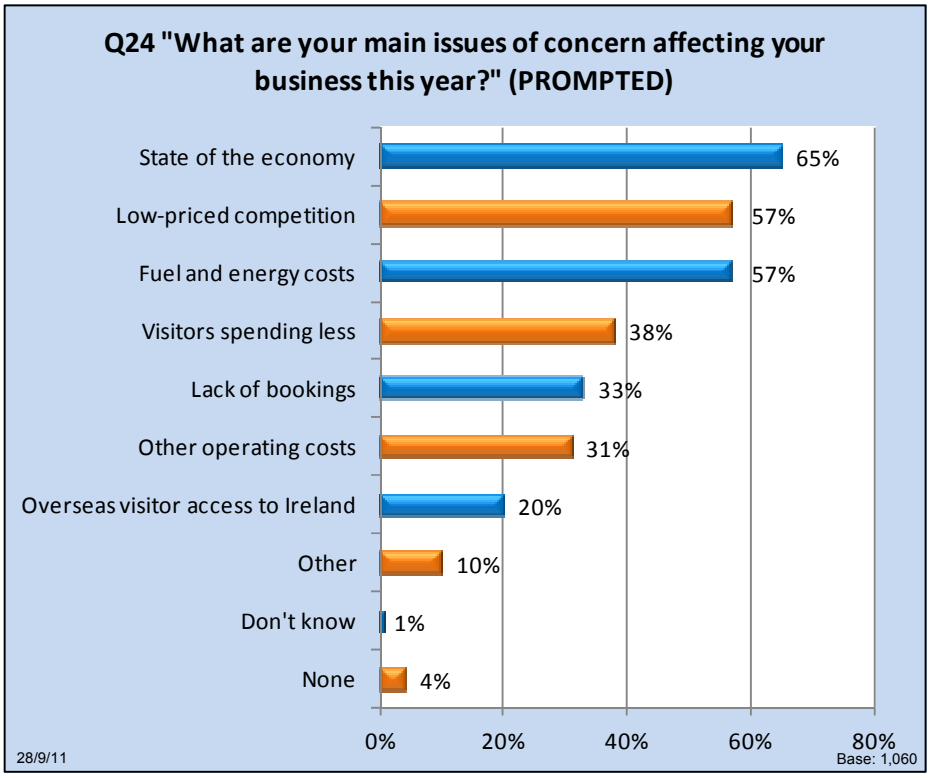
"Increase in French business was through our own marketing efforts"
Hotel

Further positive factors

7.3 The decision by some Irish people to holiday at home rather than abroad has been a positive factor for many (28%), as has the attraction of local events (26%).

7.4 The visits this year of Queen Elizabeth and President Barack Obama continue to have a positive effect, as does the Government's decision to cut VAT rates on a range of tourism related products and services.

8. Issues of Concern Affecting Business



State of the economy and visitor spending

8.1 Two in three (65%) respondents give the state of the economy as a significant issue of concern. The national economy continues to be in a poor state, and within the last few months, the outlook for the international economy appears to have taken another turn for the worse. One of the knock-on effects is that visitors are being cautious and spending less. This concern has been expressed by about two in five (38%) respondents.

Low-priced competition

8.2 Over half (57%) of operators state low-priced competition as a key issue of concern affecting their business this year.

8.3 By far the most frequently mentioned source of such competition is NAMA or bank-funded hotels. Operators in some other sectors are not able to make back discounts given on rooms rates through bar or restaurant revenues.

"Get rid of the excess hotels which are undermining family run businesses by undercutting in order to get them to their bars and restaurants"
Guesthouse

"As a B&B, competing against NAMA financed hotels which will sell rooms at any price to achieve value added benefits from the bars and restaurants - the B&B sector is unable to compete"
B&B

"We have seen room rates plummeting due to NAMA hotels offering unsustainable rates. This has had such a detrimental effect on the ordinary independent hotel, this cannot be allowed to continue"
Hotel

Crippling costs

8.4 Over half (57%) of respondents state fuel and energy costs as a key issue of concern, and about a third (31%) state other operating costs.

"Commercial rates and water rates are crippling"
Hotel

"Sunday pay, wage rates and council rates have to be reduced. Light and heat etc. is going up so we have to reduce what is in our power to reduce"
Hotel

"With energy cost through the roof it takes away all the good work"
Guesthouse

Overseas visitor access to Ireland

8.5 One in five (20%) respondents state overseas visitor access as an issue of concern. Some of these concerns relate to the price of ferry travel, and some relate to air access to the west of Ireland.

"Ferry crossing from GB is too expensive"
Hotel

"Lack of air access and seat capacity into airports along the west coast remains a major threat"
Hostel

Unapproved operators

8.6 One of the main answers not prompted is that of unapproved operators.

"The main factor that affects our business is competition from the unapproved sector who can offer cheaper rates for bed/breakfast"
Guesthouse

"I feel very strongly that B&B's and guesthouses that operate without planning and are not registered with any authority should be closed immediately"
Guesthouse

9. Appendix 1 – Background and Methodology

Background and Objectives

9.1 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. It has been conducted regularly since 1999.

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

9.3 Fieldwork for this wave took place following the summer holiday period. The objectives were to measure:

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

Methodology

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

9.5 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.

9.6 Fáilte Ireland provided a database of 3,547 usable contacts for survey spread across eight industry sectors (discussed under 'sampling' below). An email was sent on 5th September to all contacts on the database containing a link to the online survey and an explanation of the survey objectives. A reminder email was sent after a week to non-responders.

9.7 A total of 934 responses were received to the online survey – a response rate of 26%.

9.8 Following this, we conducted 126 'top-up' interviews by telephone with non-responders in the smaller sectors 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.

9.9 Both the telephone and the online surveys were brought to a close on 20th September.

Sampling

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

Sector	Online responses	Telephone top-ups	Total sample size
Hotels	165	2	167
Guesthouses	79	10	89
Bed & Breakfast	492	-	492
Self-catering	36	33	69
Caravan / campsites	23	31	54
Hostels	40	20	60
Attractions	86	7	93
Golf clubs	13	23	36
Total	**934**	**126**	**1,060**

Interviews for Contextual Background

9.11 In a separate exercise, we conducted seven 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
- Irish Hotels Federation
- Coach Tourism and Transport Council
- Irish Caravan and Camping Council
- Car Rental Council

Appendix 2 – Copy of Questionnaire

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 2010?

Yes ..... ❑ Go to Q2
No ..... ❑ Go to Q23

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

Up on 2010 ..... ❑
Same as 2010 ..... ❑
Down on 2010 ..... ❑
Don't know ..... ❑

Q3 (IF UP) By approximately what percentage is the volume of your overall business to date this year up on the same period last year?

1 - 5% ..... ❑
6 - 10% ..... ❑
11 - 20% ..... ❑
21 - 30% ..... ❑
More than 30% ..... ❑
Don't know ..... ❑

(If more than 30%) Please specify approximately by what percentage overall business is up _____ ____

Q4 (IF DOWN) By approximately what percentage is the volume of your overall business to date this year down on the same period last year?

1 - 5% ..... ❑
6 - 10% ..... ❑
11 - 20% ..... ❑
21 - 30% ..... ❑
More than 30% ..... ❑
Don't know ..... ❑

(If more than 30%) Please specify by approximately what percentage overall business is down _____ ____

Q5 **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 2010	*Same as 2010*	*Down on 2010*	*Don't know*	*Not applicable*
Republic of Ireland	❑	❑	❑	❑	❑
Northern Ireland	❑	❑	❑	❑	❑
Overseas	❑	❑	❑	❑	❑

Q6 **You have answered that your Republic of Ireland business this year to date is up compared to the same period last year. By approximately what percentage is it up?**

1 - 5% ..... ❑
6 - 10% ..... ❑
11 - 20% ..... ❑
21 - 30% ..... ❑
More than 30% ..... ❑
Don't know ..... ❑

(If more than 30%) Please specify by approximately what percentage business from Republic of Ireland is up _____ ____

Q7 **You have answered that the volume of your Republic of Ireland business this year to date is down compared to the same period last year. By approximately what percentage is it down?**

1 - 5% ..... ❑
6 - 10% ..... ❑
11 - 20% ..... ❑
21 - 30% ..... ❑
More than 30% ..... ❑
Don't know ..... ❑

(If more than 30%) Please specify by approximately what percentage business from Republic of Ireland is down _____ ____

Q8 **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 2010	*Same as 2010*	*Down on 2010*	*Don't know*	*Not applicable*
Great Britain	❑	❑	❑	❑	❑
France	❑	❑	❑	❑	❑
Germany	❑	❑	❑	❑	❑
USA	❑	❑	❑	❑	❑

Q9 **You have answered that the volume of your business from Great Britain this year to date is up compared to the same period last year. By approximately what percentage is it up?**

1 - 5% ..... ❑
6 - 10% ..... ❑
11 - 20% ..... ❑
21 - 30% ..... ❑
More than 30% ..... ❑
Don't know ..... ❑

(If more than 30%) Please specify by approximately what percentage business from Great Britain is up _____ ____

Q10 **You have answered that the volume of your business from Great Britain this year to date is down compared to the same period last year. By approximately what percentage is it down?**

1 - 5% ..... ❑
6 - 10% ..... ❑
11 - 20% ..... ❑
21 - 30% ..... ❑
More than 30% ..... ❑
Don't know ..... ❑

(If more than 30%) Please specify by approximately what percentage business from Great Britain is down _____ ___

Q11 **You have answered that the volume of your business from France this year to date is up compared to the same period last year. By approximately what percentage is it up?**

1 - 5% ..... ❑
6 - 10% ..... ❑
11 - 20% ..... ❑
21 - 30% ..... ❑
More than 30% ..... ❑
Don't know ..... ❑

(If more than 30%) Please specify by approximately what percentage business from France is up _____ ___

Q12 **You have answered that the volume of your business from France this year to date is down compared to the same period last year. By approximately what percentage is it down?**

1 - 5% ..... ❑
6 - 10% ..... ❑
11 - 20% ..... ❑
21 - 30% ..... ❑
More than 30% ..... ❑
Don't know ..... ❑

(If more than 30%) Please specify by approximately what percentage business from France is down _____ ___

Q13 **You have answered that the volume of your business from Germany this year to date is up compared to the same period last year. By approximately what percentage is it up?**

1 - 5% ..... ❑
6 - 10% ..... ❑
11 - 20% ..... ❑
21 - 30% ..... ❑
More than 30% ..... ❑
Don't know ..... ❑

(If more than 30%) Please specify by approximately what percentage business from Germany is up _____ ___

Q14 **You have answered that the volume of your business from Germany this year to date is down compared to the same period last year. By approximately what percentage is it down?**

1 - 5% ..... ❑
6 - 10% ..... ❑
11 - 20% ..... ❑
21 - 30% ..... ❑
More than 30% ..... ❑
Don't know ..... ❑

(If more than 30%) Please specify by approximately what percentage business from Germany is down _____ ___

Q15 **You have answered that the volume of your business from USA this year to date is up compared to the same period last year. By approximately what percentage is it up?**

- *1 - 5%* ❑
- *6 - 10%* ❑
- *11 - 20%* ❑
- *21 - 30%* ❑
- *More than 30%* ❑
- *Don't know* ❑

(If more than 30%) Please specify by approximately what percentage business from USA is up _____ %

Q16 **You have answered that the volume of your business from USA this year to date is down compared to the same period last year. By approximately what percentage is it down?**

- *1 - 5%* ❑
- *6 - 10%* ❑
- *11 - 20%* ❑
- *21 - 30%* ❑
- *More than 30%* ❑
- *Don't know* ❑

(If more than 30%) Please specify by approximately what percentage business from USA is down _____ %

Q17 **How does your overall profitability to date this year compare with the same period last year?**

- *Up on 2010* ❑
- *Same as 2010* ❑
- *Down on 2010* ❑
- *Don't know* ❑

Q18 **How does your average room yield to date this year compare with the same period last year?**

- *Up on 2010* ❑
- *Same as 2010* ❑
- *Down on 2010* ❑
- *Don't know* ❑

Q19 **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	❑	❑	❑	❑	❑	❑	❑

Q20 **How do you expect the volume of your overall business to perform during the remainder of the year compared to the same period last year?**

- *Up on 2010* ❑
- *Same as 2010* ❑
- *Down on 2010* ❑
- *Don't know* ❑

Q21 **How do you expect the volume of your overall business to perform during the remainder of the year compared to the same period last year from each of the following markets?**

	Up on 2010	*Same as 2010*	*Down on 2010*	*Don't know*	*Not applicable*
Republic of Ireland	❑	❑	❑	❑	❑
Northern Ireland	❑	❑	❑	❑	❑
Overseas	❑	❑	❑	❑	❑

Q22 **How do you expect the volume of your overseas business to perform during the remainder of the year compared to the same period last year from each of the following markets?**

	Up on 2010	*Same as 2010*	*Down on 2010*	*Don't know*	*Not applicable*
Great Britain	❑	❑	❑	❑	❑
France	❑	❑	❑	❑	❑
Germany	❑	❑	❑	❑	❑
USA	❑	❑	❑	❑	❑

Q23 **What are the main positive factors affecting your business this year? (*If there are none, please answer 'none' below*)**

President Barack Obama visiting Ireland ..... ❑
Queen Elizabeth visiting Ireland ..... ❑
Tax cuts ..... ❑
Weather ..... ❑
Own marketing ..... ❑
Marketing by local or national tourist boards ..... ❑
Improved road access around Ireland ..... ❑
Local events ..... ❑
Repeat visitors ..... ❑
Irish people holidaying in Ireland ..... ❑
None ..... ❑
Don't know ..... ❑
Other ..... ❑

Please specify other _____

Q24 **What are your main issues of concern affecting your business this year? (*If there are none, please answer 'none' below*)**

Low-priced competition ..... ❑
Fuel and energy costs ..... ❑
Other operating costs ..... ❑
State of the economy ..... ❑
Lack of bookings ..... ❑
Visitors spending less ..... ❑
Overseas visitor access to Ireland ..... ❑
None ..... ❑
Don't know ..... ❑
Other ..... ❑

Please specify other _____

Q25 **What comments would you like to make about your business this year and any factors affecting it?**

_____

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 over the period 2011 - 2012.

_____

Thank you for completing Fáilte Ireland's Tourism Barometer for September 2011. Please now click on 'submit' below.