STRATEGIC
MARKETING

Fāilte Ireland
National Tourism Development Authority

Tourism Barometer











September 2013

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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 year / for the following year.

We received 633 responses to an online survey with tourism businesses in September 2013 and conducted 151 top-up telephone interviews. We also conducted eight qualitative interviews with senior industry executives. More details on the methodology can be viewed in appendix 1.

Business Sentiment Index (Prospects for the year ahead)

	2007	2008	2009	2010	2011	2012	2013
Up	45	14	15	28	39	41	61
Same	24	18	11	25	31	24	26
Down	31	68	74	47	30	35	13

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

1.1 The Business Sentiment Index shows that sentiment in the industry has increased significantly this year. There is strong sentiment that the market has really turned the corner this year and the future is looking more positive.

Excellent year for paid serviced accommodation

1.2 Two in three (65%) weighted PSA operators report increased visitor volumes to date this year and close to a quarter (22%) report the same level. Only a minority (13%) of PSA businesses have experienced a decrease.

1.3 For the first time since the start of the financial crisis, visitor volumes are significantly up in all three PSA sectors – hotels, guesthouses and B&Bs.

1.4 The fine weather has helped significantly this summer, with three in four (75%) PSA businesses stating it as a positive factor.

1.5 The overseas market is particularly strong this year, with the majority (73%) of PSA operators experiencing increased visitors, especially from North America.

1.6 Expectations for the remainder of the year are high, with the vast majority (86%) of PSA businesses expecting the same or increased visitor volumes.

Strong performance in self-catering

1.7 The self-catering sector is also enjoying an excellent year, with about half (52%) of operators reporting increased visitors and about a third (31%) reporting the same level.

1.8 The sector has benefited significantly from the fine weather this summer, and repeat visitors have also played a significant part, with the vast majority (89%) stating this as a positive factor this year.

Attraction visitor levels are buoyant

1.9 Attractions have performed strongly this year to date, with about half (49%) reporting increased visitor volumes and a third (33%) reporting the same level.

Restaurants enjoying increased tourism trade

1.10 Restaurants endured a very difficult period during the financial crisis, but figures from restaurants in areas of good tourist footfall show that the sector is recovering in terms of tourism trade. Well over half (58%) of respondents are up on tourist visitor levels to date this year.

Smaller sectors also performing very well

1.11 Hostels, golf clubs and caravan & campsites are also enjoying a successful year for tourism. Caravan & campsites have benefited significantly from the fine weather, with two in three (67%) reporting increased visitor levels, and all (100%) respondents in the sector stating the weather as a positive factor.

Benefits from The Gathering are well spread across the country

1.12 Overall, one in three (33%) respondents say they have experienced increased business from The Gathering, and about one in ten (9%) still expect it.

1.13 Hotels have benefited the most, with over half (57%) experiencing increased business as a result of The Gathering.

1.14 Another point to note is that there are no significant differences among the seven regions of Ireland, indicating that the benefits of The Gathering have been well spread across the country.

2. Qualitative Findings

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

Upwards trend in 2013

2.1 After a poor start to the year, the summer months saw an increase in bookings as the warm weather encouraged business and optimism began to rise. That optimism has leaked into September as business remains up on 2013.

2.2 The good weather also meant visitors were happier and left with a higher satisfaction level than in previous years.

"The weather in 2013 made people happier"

2.3 And while fuel and energy costs remain a high concern for most businesses, the summer sun saw some relief as heating and electricity bills were reduced.

"The costs of light and heat are an ongoing problem, although they were alleviated over the summer months during the heat."

North American market remains on the rise

2.4 Last year saw an increase in visitors from the North American market – a trend that continues this year. Some businesses believe that an increase in flights surrounding the marketing of The Gathering has contributed to this.

"There has been a significant uplift in overseas business in 2013. North America was significantly better and saw double-digit growth."

"The American market is strong – particularly tourists from Texas."

2.5 B&B Ireland members have seen a 27% increase in revenue from North American visitors.

2.6 Even those that rely on the domestic market have seen a slight increase in the North American market. Other countries that have seen an increase this year include Great Britain, Holland, Germany and France.

The Gathering is positive, but not always easy to quantify

2.7 Across the board, it is believed that The Gathering has had a positive impact on Ireland and the perception of the country, which should benefit from the campaign's long-term legacy.

"The Gathering has raised awareness of Ireland both within the domestic and overseas markets."

"Even if they haven't come yet, a visit to Ireland is more likely now – The Gathering is likely to encourage more people to Ireland in the next few years after this kick-start."

2.8 While most find it hard to quantify, there is a belief that it has seen an increase in bookings – possibly because of the additional flights available – and that it is continuing to raise the profile of Ireland.

VAT concerns in the Budget

2.9 While some have benefited from the 9% VAT rate, there are fears that if the rate is increased in the next Budget it could quash the growth seen this year, and lead to the loss of Ireland's competitive edge in Europe.

2.10 Without knowing the outcome of the budget, some businesses are finding it difficult to price services for next year.

"Predicting pricing in 2014 will be difficult without knowing the outcome of the budget."

Last minute bookings continue

2.11 The trend for visitors to book a trip last minute continues this year. This makes projections difficult for some companies as advance bookings diminish. One operator predicted a substantial loss in July, but came out of the month significantly up.

2.12 Last minute bookings can also cause problems with availability – especially in the tourist hotspots like Dublin and for large groups or corporate events.

'Quietly positive' about 2014

2.13 Following on from the growth in 2013, there is a clear, but tentative, optimism for the year ahead. Businesses have adapted and increased the services they offer to meet the changing needs of consumers.

"We are quietly optimistic for next year."

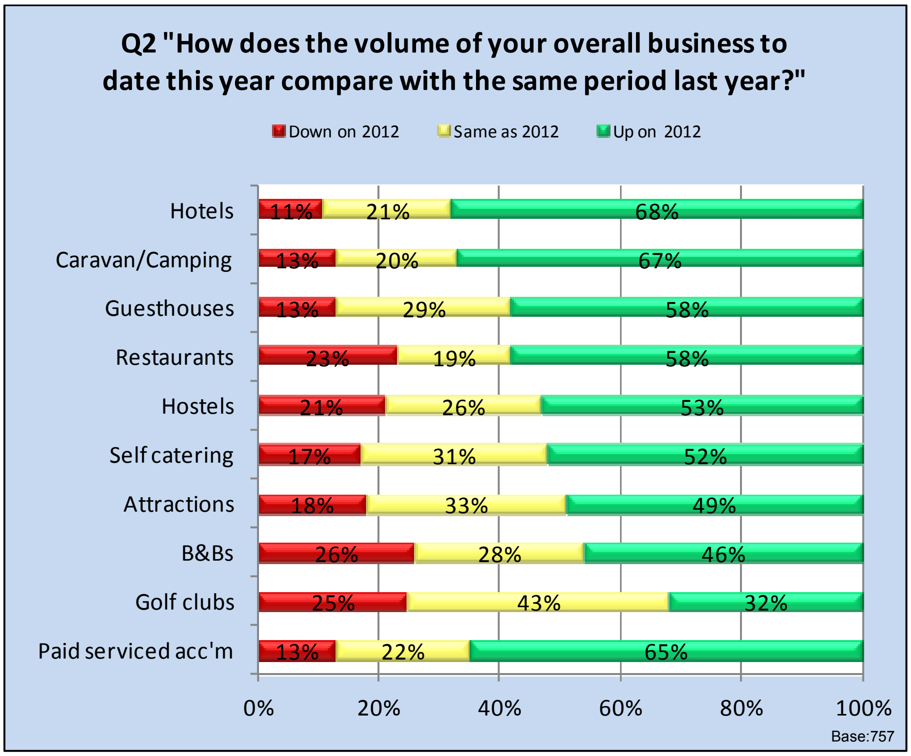
2.14 Overseas markets continue to be identified for a slow and steady growth as Ireland remains on the map – partially due to the country's competitive prices and promotion of The Gathering.

"There is a degree of optimism going into 2014. Most of the travel trade across Europe seems to be continuing their promotion of Ireland as a destination and this should hopefully convert into bookings."

3. Overall Visitor Volumes in 2013 and Expectations

In this section we discuss the performance to date and expectations for the industry overall. More detailed results by market for each individual sector are discussed in subsequent chapters.

Overall visitor volumes in 2013



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 in this section 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.

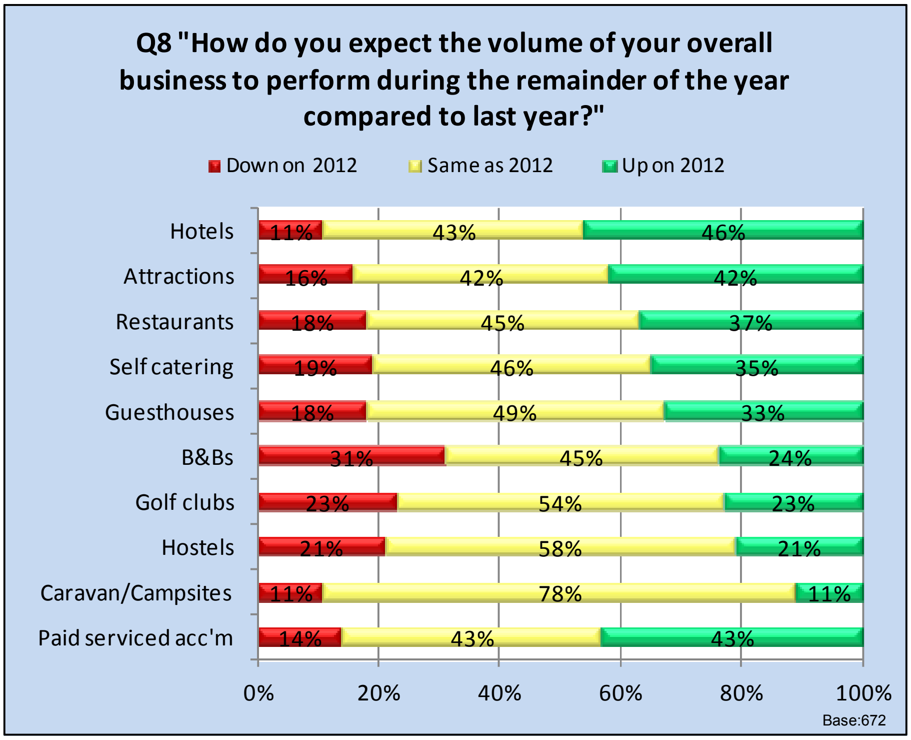
The market has turned the corner significantly in 2013

3.1 The mass of green on the above chart portrays the significant upturn in the market this year. Visitor volumes are significantly up in every sector.

3.2 The fine weather this summer has had a significant effect on the market.

"I think the weather was the dramatic factor in improving business this year"
Hotel

Expectations for the remainder of the year



Positive outlook across the industry

3.3 Following a successful summer, operators are optimistic about the remainder of the year. There is a sense of better times ahead following many difficult years in the financial crisis.

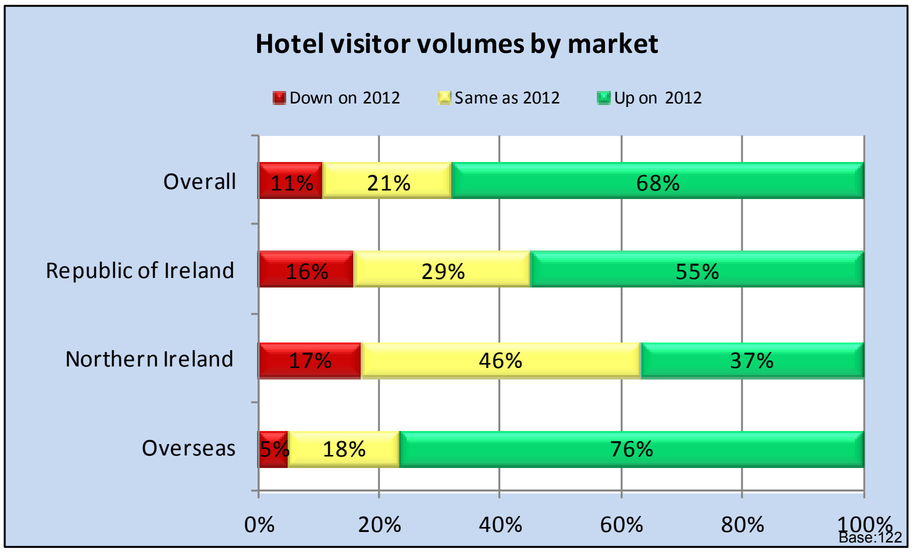
"Great Irish weather, people more positive, not talking about the recession as much"
Hotel

"People aren't talking about the recession as much as before"
Guesthouse

4. Hotels

In this and the following sections we discuss each sector in turn in terms of performance to date and expectations, starting with hotels.

Hotel visitor volumes year to date



Very strong overseas market performance for hotels

4.1 The overseas market performance stands out significantly in 2013. All the major overseas markets (Britain, France, Germany, North America) are significantly up – especially North America, where two in three (65%) respondents report increased visitors.

4.2 The Gathering is likely to have played a key part in the increased overseas visitors for hotels, especially from North America. Well over half (57%) of hotel respondents report increased business as a result of The Gathering. Some respondents are now concerned what will take over from The Gathering next year.

"We need to continue The Gathering into future years. It cannot be a one-off. What is planned for 2014, 2015?"
Hotel

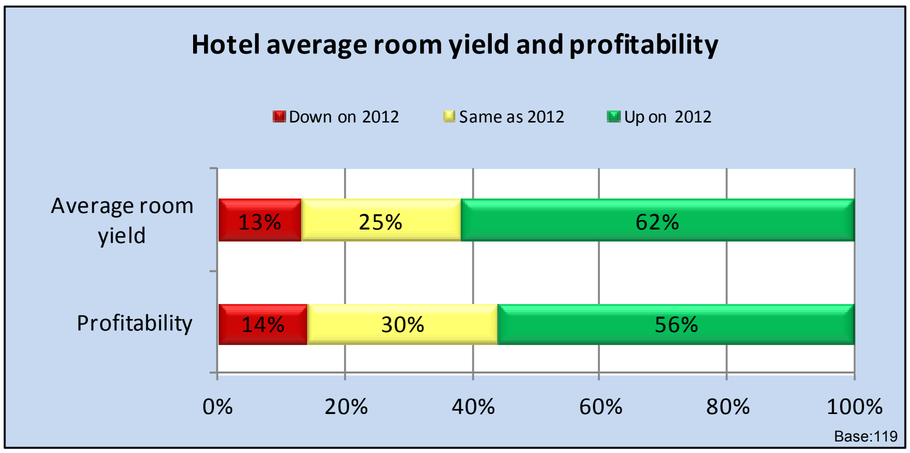
"The Gathering has been a great success and really struck a chord in North America. We need to keep this going"
Hotel

Domestic market is also strong

4.3 The domestic market is also strong this year, with over half (55%) of respondents reporting increased visitors. The fine weather has been a significant factor this summer in boosting the domestic market.

"We are a small seaside resort which depends on good weather to increase business. After having a fabulous summer of good weather, all aspects of business in our area had a great season this year"
Hotel

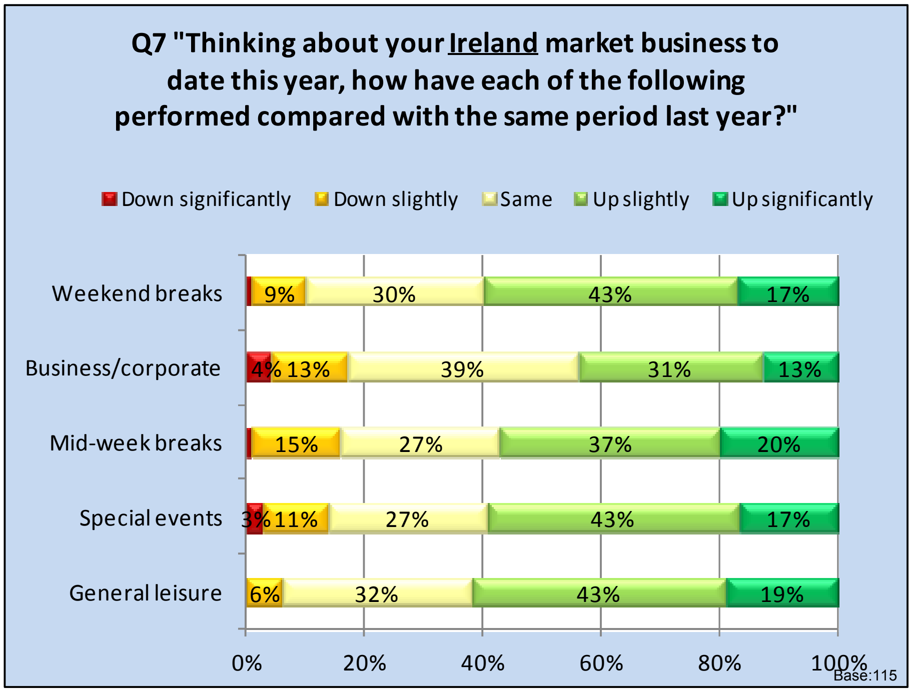
Hotel average room yield and profitability



Improved level of profitability in the hotel industry

4.4 Profit margins have been under pressure for some time, but this year it appears that more hotels are returning to profit.

Hotel visitor types (Ireland market)



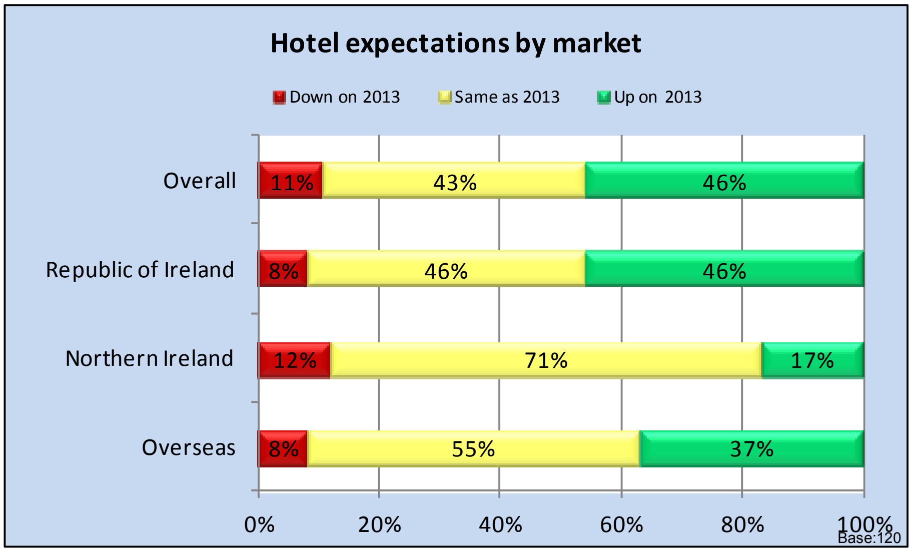
All market types are up

4.5 The positive results in the hotel sector are reflected across all visitor types in the domestic market. General leisure visitors have performed very strongly, with the majority (62%) of hotels reporting this visitor type to be up, and only a small minority (6%) reporting them to be slightly down.

4.6 Special events are up for three in five (60%) hotels.

"We have added a marquee to the hotel so we can accommodate more weddings ... so we can cater for higher numbers"
Hotel

Hotel expectations



2013 expected to remain positive to the end

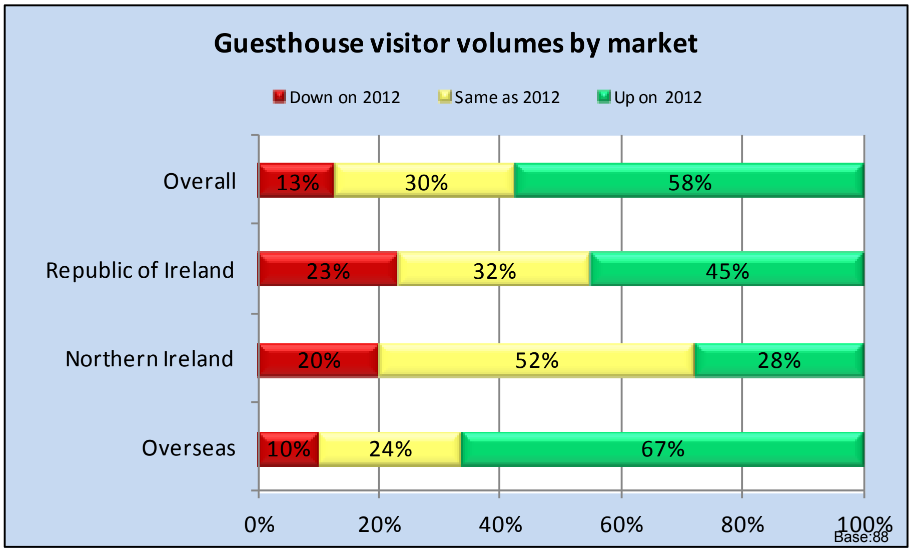
4.7 Hotel operators are in a very positive frame of mind right now. The success this year to date is expected to continue through the remainder of 2013, and comments suggest that 2014 is already expected to be good.

"We hope that the [good] weather continues as it's a positive for next year already"
Hotel

"The one positive thing is a new coastal route. It will help make a difference next year"
Hotel

5. Guesthouses

Guesthouse visitor volumes year to date



Very positive upturn for guesthouses

5.1 The guesthouse sector has endured a difficult few years in the financial crisis but this year the visitor volumes are significantly better than last year. Well over half (58%) of respondents have experienced increased visitors to date this year.

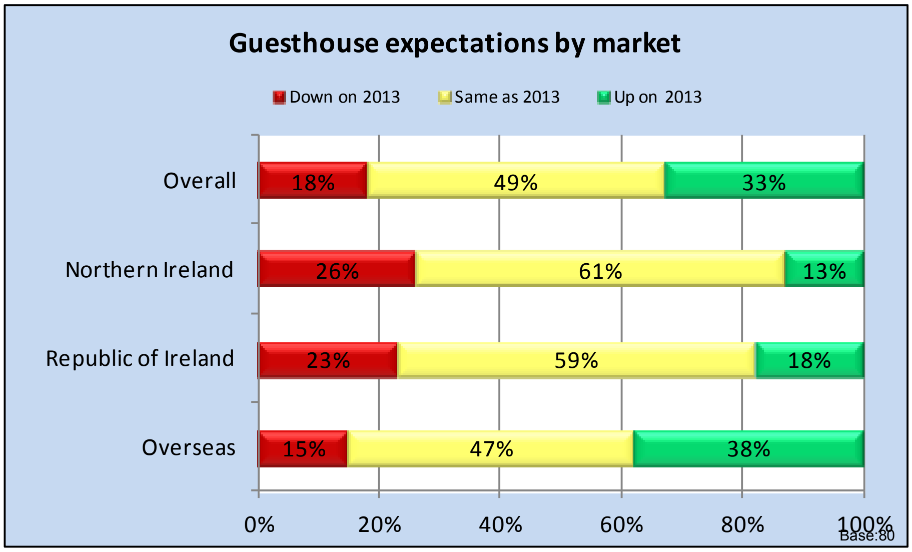
5.2 Profitability is also up for the first time in many years. Over two in five (43%) guesthouses have increased profitability this year and over a third (36%) have achieved the same level.

5.3 The German market is very strong this year, with about half (49%) of respondents seeing an increase in visitors and two in five (40%) seeing the same level. The American market is also very strong, with well over half (61%) of guesthouses seeing increased visitors.

"We had a big influx of Germans this year and I feel it is thanks to Tourism Ireland's work on the ground in Germany"
Guesthouse

"So many Americans!!"
Guesthouse

Guesthouse expectations

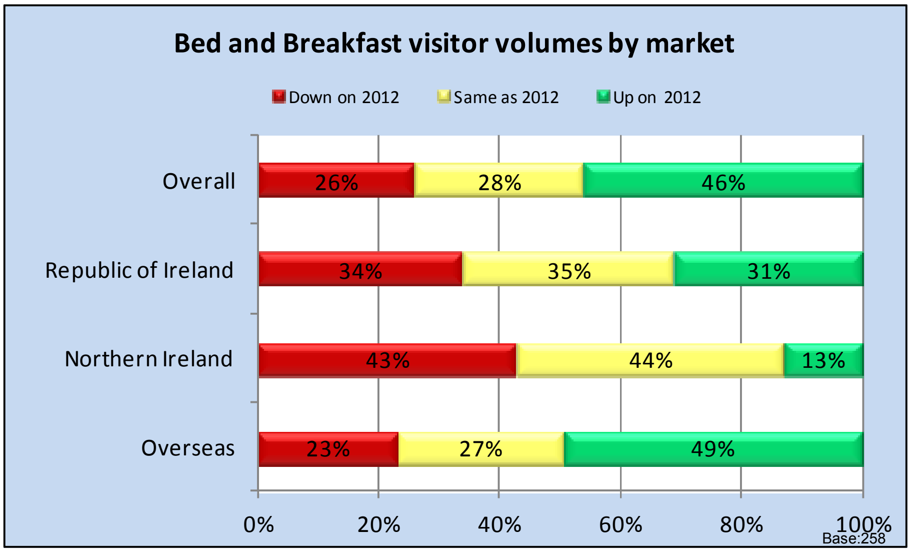


Expectations for the remainder of the year rest on overseas visitors

5.4 In spite of an excellent summer, guesthouse operators are cautious about the remainder of the year in terms of Irish visitors. The main expectation lies with those from overseas, especially from North America and Germany, the two markets which are performing particularly well this year.

6. B&Bs

B&B visitor volumes year to date



Finally good news for the B&B sector

6.1 The B&B sector has endured a number of very challenging years since the financial crisis started, but finally in 2013 the sector is experiencing better times.

6.2 The overseas market is particularly strong this year, whereby about half (49%) of respondents have received increased visitors. The German market is performing very well, with close to half (45%) of operators reporting increased visitors.

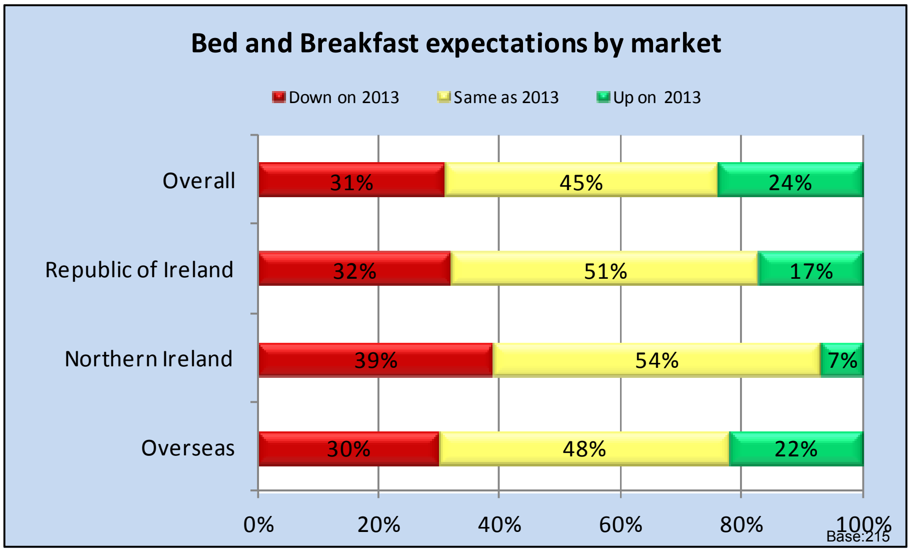
"I am very pleased to say that my business from Switzerland, Holland, Germany, Austria and France increased dramatically this year"
B&B

6.3 Profit margins however are still tight in this sector, as about two in five (41%) respondents report being down on profitability this year.

6.4 Repeat visitors are the most frequently mentioned positive factor affecting businesses this year (stated by 65% of respondents).

"Guests are very happy with their holiday in Ireland and almost all will return they say. It is very good value for the customer but margins are very tight for operators"
B&B

B&B expectations



Cautious expectations for the remainder of the year

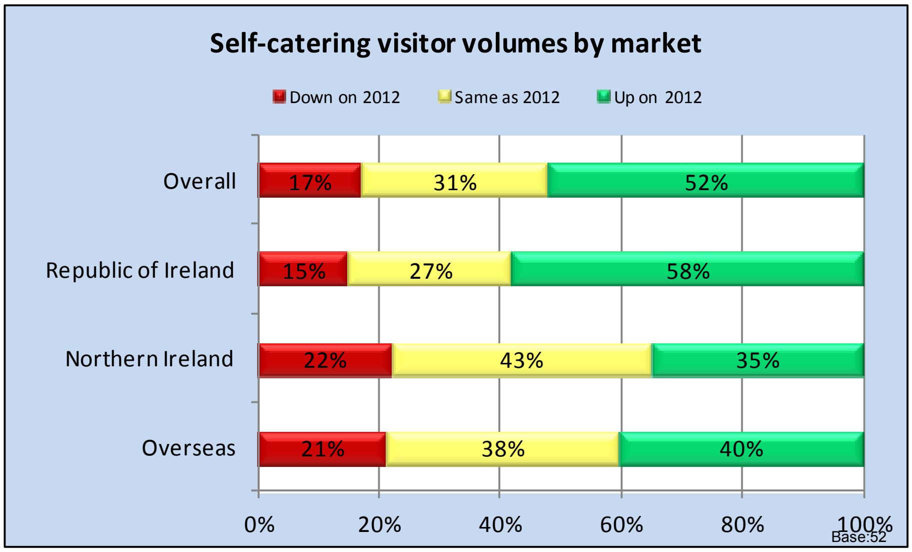
6.5 In spite of a very positive year for the sector, operators have some reservations about the remainder of the year. There are still a lot of significant challenges in the sector, and whilst visitor volumes have increased this summer, profit margins are under pressure.

"Profit margins are too low"
B&B

"The margins are very tight and not sustainable. No new B&Bs are opening, which is not good for the future as they offer a different kind of experience for tourists ... The B&B operator is no longer the little old lady in slippers and curlers. We are now IT savvy and clued in on market development"
B&B

7. Self-catering

Self-catering visitor volumes year to date



Very positive year for self-catering

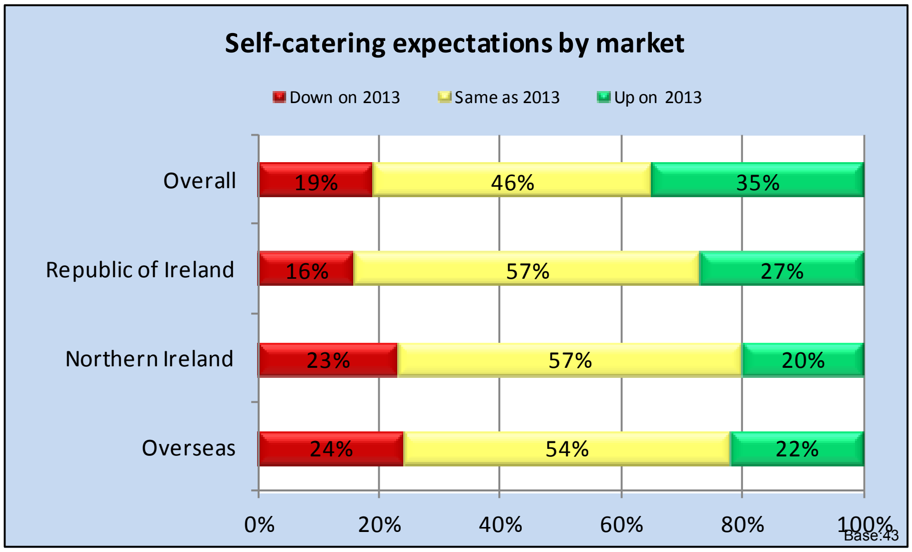
7.1 The self-catering sector is enjoying a very busy year, with about half (52%) of operators experiencing increased visitors and about a third (31%) receiving the same level.

7.2 The domestic market is particularly strong in this sector, with well over half (58%) of operators welcoming increased domestic visitors. This is closely linked to repeat visitors (which 89% of respondents give as a positive factor this year) and the fine weather (stated by 81% of respondents).

"The excellent weather was a big factor"
Self-catering

7.3 Profitability is also good, with about two in five (38%) operators reporting increased profitability and a similar proportion (40%) achieving the same level.

Self-catering expectations

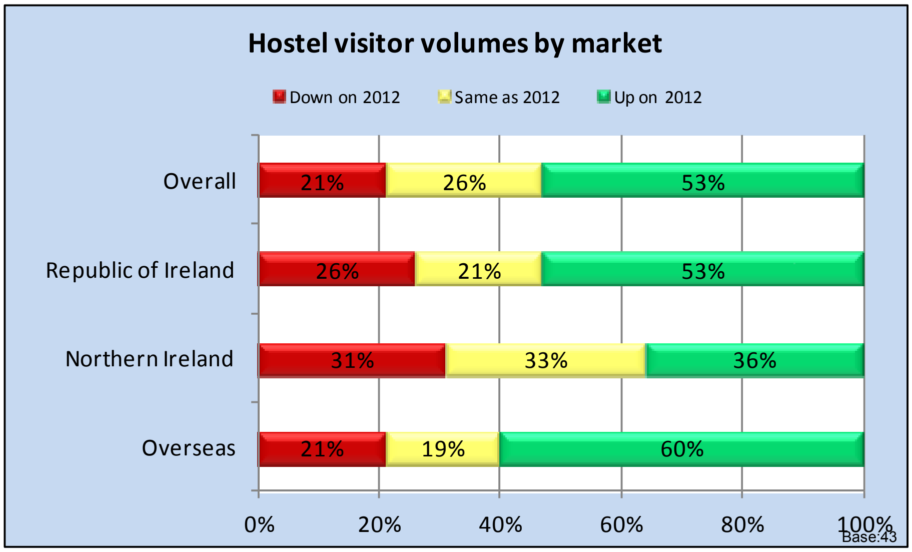


Domestic market expected to remain good

7.4 Following an excellent summer, the domestic market is expected to remain good for the remainder of the year, with most (84%) respondents expecting the same or increased domestic visitors compared to the same period last year.

8. Hostels

Hostel visitor volumes year to date



Busy year for hostels

8.1 Hostels have been very busy this year, with over half (53%) seeing increased visitor levels and about one in four (26%) seeing the same level.

8.2 The domestic and overseas markets have both been very strong, and in particular, numerous French and German visitors have been received.

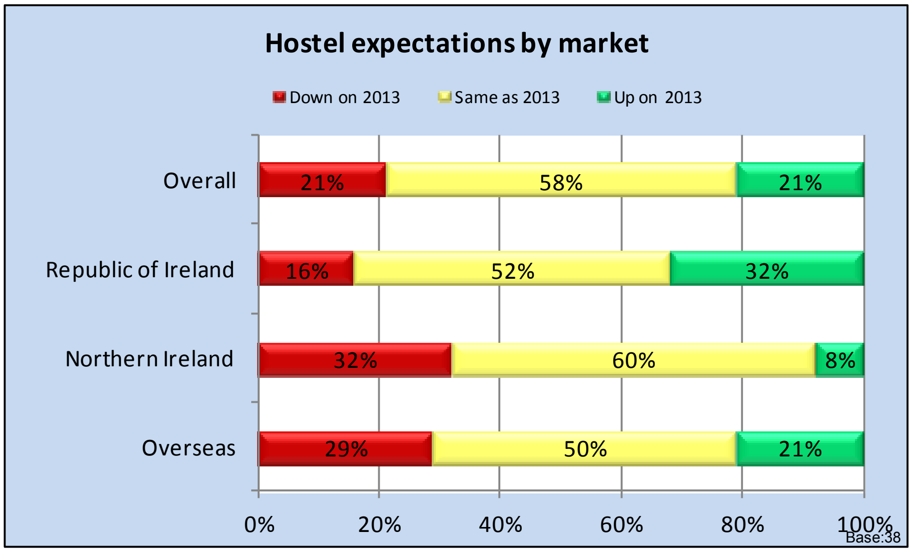
"We get a lot of Europeans, it's really picking up. We have German-speaking and Irish-speaking staff. When we tell German and Irish speakers it makes their minds up straight away to stay with us"
Hostel

8.3 Profitability does not quite match the increase in visitor volumes however, as about two in five (39%) operators have experienced increased profitability this year to date, but a similar proportion (34%) have experienced a decrease. Many respondents comment on very high operating costs.

"Local rates and water charges are crippling local businesses"
Hostel

"Local authority charges are an issue of concern"
Hostel

Hostel expectations

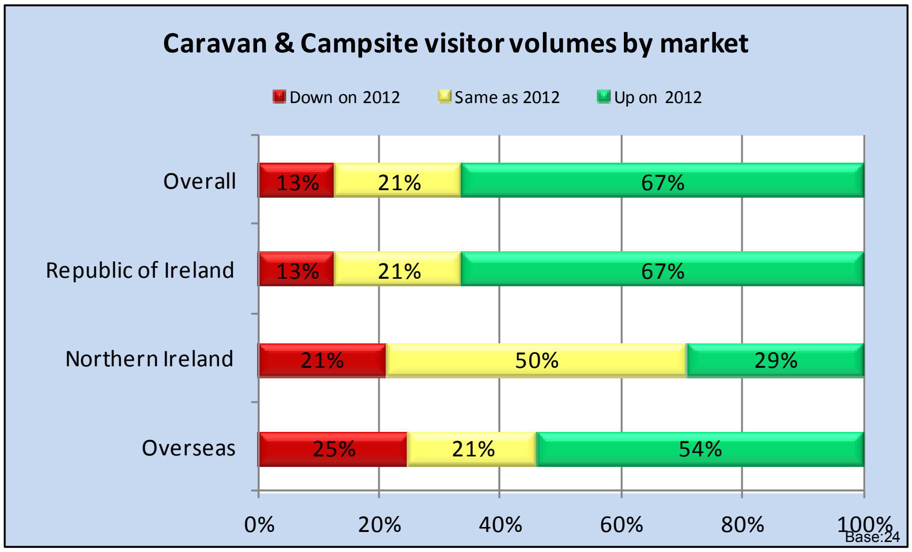


Steady end to the year

8.4 Expectations are steady for the remainder of the year, with the domestic market offering the most promise.

9. Caravan and Campsites

Caravan and campsite visitor volumes year to date



Caravan and campsite sector has benefited greatly from the weather

9.1 The warm sunny weather has drawn holidaymakers to caravan and campsites this summer. Two in three (67%) operators have had more visitors year to date than last year, and the domestic market has been particularly strong. All (100%) respondents have stated the weather as a positive factor this year.

"The weather has been a big factor, increasing our business for this year"
Caravan park

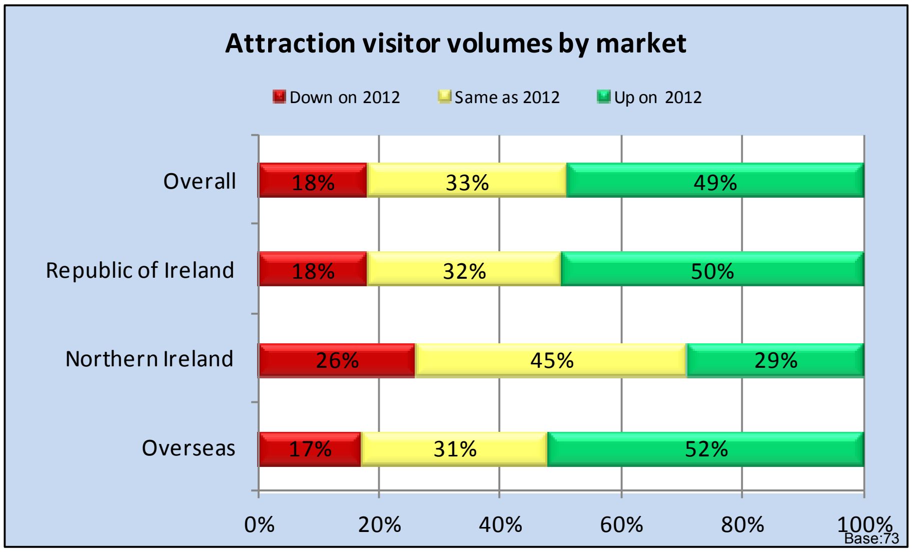
9.2 Profitability is significantly up, with well over half (57%) of operators seeing an increase and a further three in ten (29%) seeing the same level.

Expectations

9.3 Expectations for the remainder of the year are not particularly relevant in this sector, as many operators close in September and so the sample size of those open any longer is very small.

10. Attractions

Attraction visitor volume years to date



Attractions have enjoyed a successful year to date

10.1 Attractions have enjoyed high visitor levels this year, with both the domestic and overseas markets performing very well.

10.2 All the major overseas markets (Britain, France, Germany and North America) are up this year, particularly Germany (43% seeing increased visitors) and North America (48% seeing increased visitors).

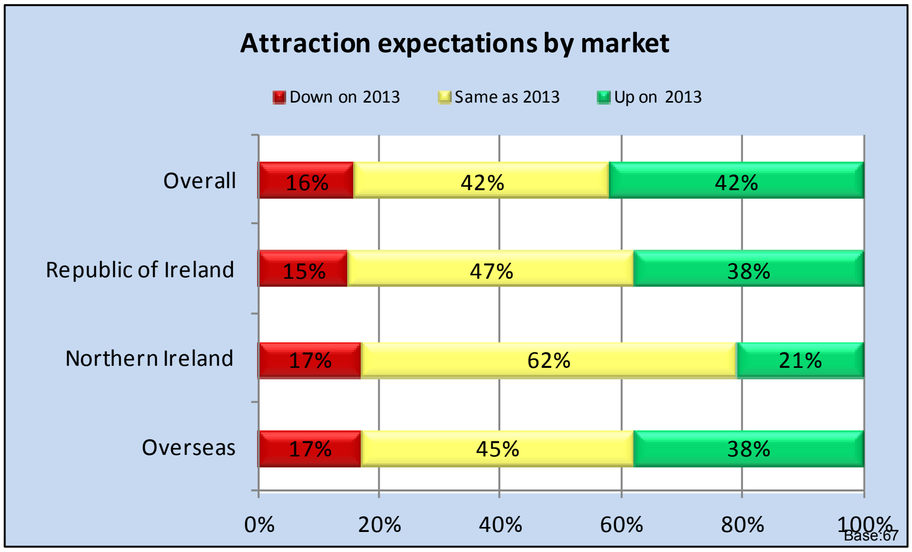
10.3 The attractions sector appears to have benefited the second most (after hotels) from The Gathering, with about two in five (38%) respondents experiencing increased visitors from the initiative.

"The weather and The Gathering have been positive factors this year"
Attraction

10.4 Profitability in the sector is up, although not in line with increased visitor volumes. About two in five (41%) respondents report increased profitability, but three in ten (30%) report a decrease. Increased visitors have not necessarily translated into increased profits.

"Although coaches were strong in number, the spending power of the individuals on those holidays appeared to be poor. Likewise a lot of independent visitors appeared to have poor spending power"
Attraction

Attraction expectations

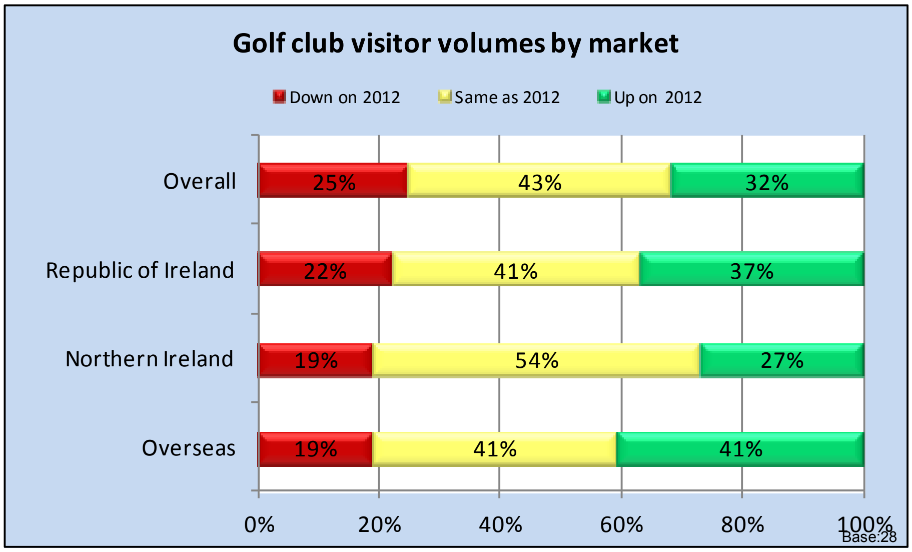


Positive expectations for the remainder of the year

10.5 The attractions sector is one of the most optimistic sectors in the tourism industry looking ahead to the remainder of the year. Most (84%) operators expect visitor volumes to be up or the same compared to last year.

11. Golf Clubs

Golf club visitor volumes year to date



Good year for overseas golf tourism

11.1 The golf club sector has enjoyed a good summer, with nearly all (96%) respondents saying the weather has been a positive factor.

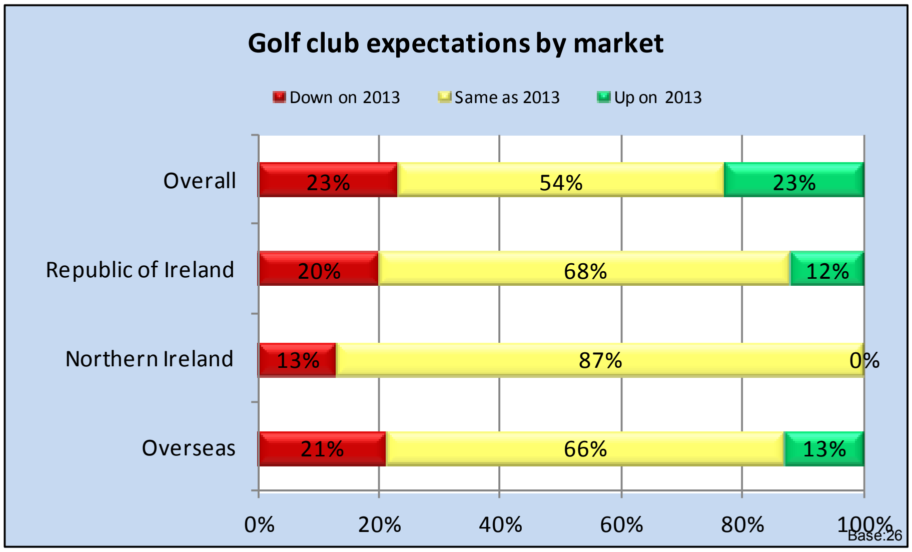
11.2 Overseas golf tourism has been particularly good, with most (82%) operators receiving the same or increased levels of overseas visitors. Some clubs comment that they have improved or maintained their course in good shape.

"Our course has been in excellent shape"
Golf club

11.3 In spite of increased visitor volumes, profitability in the sector is down on last year. A number of operators comment on significant challenges from low-priced competition.

"Competitors with NAMA control are just selling for cash flow ... driving prices down as a result"
Golf club

Golf club expectations

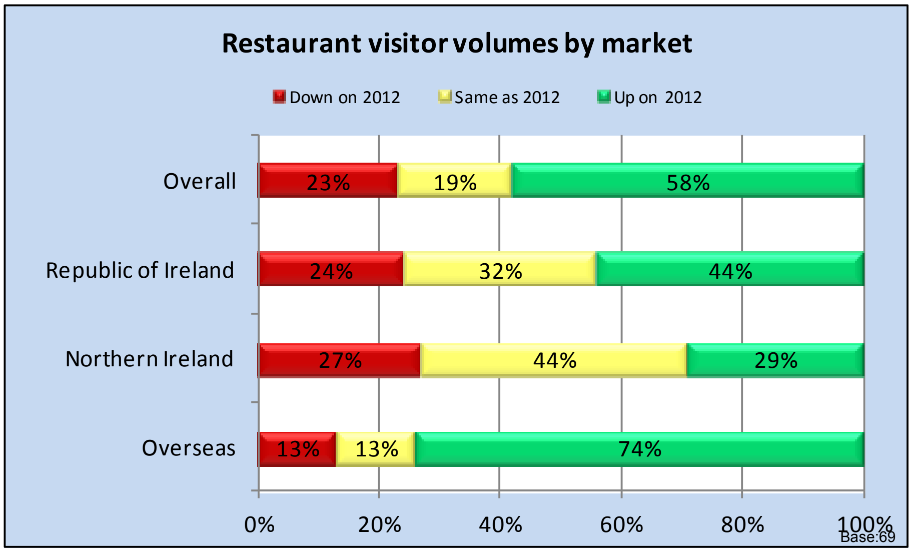


Steady end to the year

11.4 Tourism green fee business is generally expected to remain about the same for the remainder of the year.

12. Restaurants

Restaurant visitor volumes year to date



Restaurants invited to take part in the Barometer are in areas of high tourism footfall, and respondents have been asked to answer questions in the context of their tourism, i.e. non-local, business

Very positive results from the restaurant sector

12.1 Restaurants endured a very difficult period during the financial crisis, but figures from restaurants in areas of good tourist footfall show that the sector is recovering in terms of tourism trade. Well over half (58%) of respondents are up on tourist visitor levels to date this year.

12.2 The overseas market has been very buoyant this year compared to last year, with the majority (74%) of respondents reporting increased visitors.

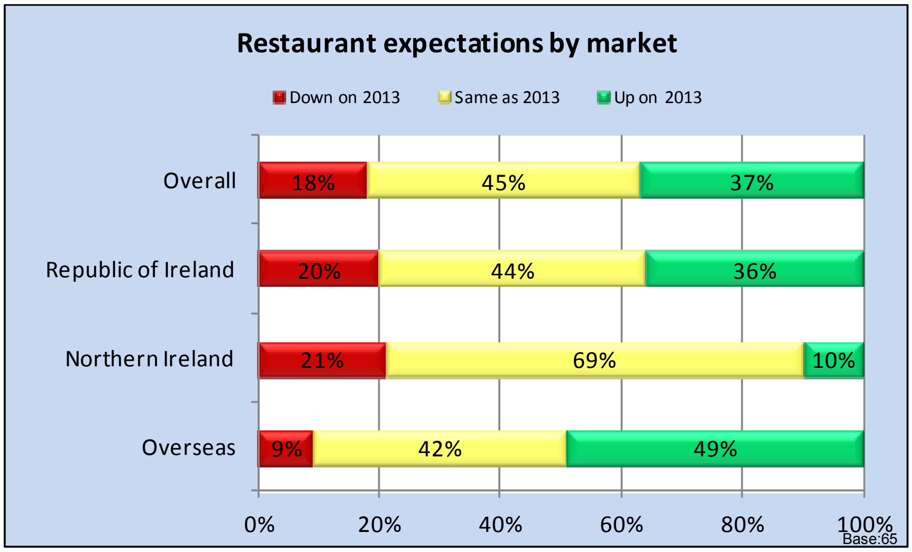
"[Certain] Tour companies … won a number of extra contracts this year and we hugely benefited from this. The groups were mainly French tourists"
Restaurant

"The American and Canadian tourists were more than ever this year"
Restaurant

12.3 Profitability in the restaurant sector has been under a lot of pressure in recent years with visitors spending noticeably less, but this year there are signs of that changing, with nearly half (46%) of respondents reporting increased profitability on last year.

"There seems to be a change in customer sentiment. Average spend is up by about €1 a head this year for the first time since 2008"
Restaurant

Restaurant expectations



Expectations remain very high for the overseas market

12.4 The buoyant overseas trade seen to date this year is expected to continue, with nearly all (91%) respondents anticipating the same or increased overseas customer levels.

VAT is a significant issue in the restaurant sector

12.5 Many respondents have commented that maintaining the 9% VAT rate on food is very important to them. Operating costs, especially rates and staff, are high, and the 9% VAT rate allows them to offer reasonable prices to customers whilst operating profitably. The increasing 'deal culture' in the sector adds extra pressure to some.

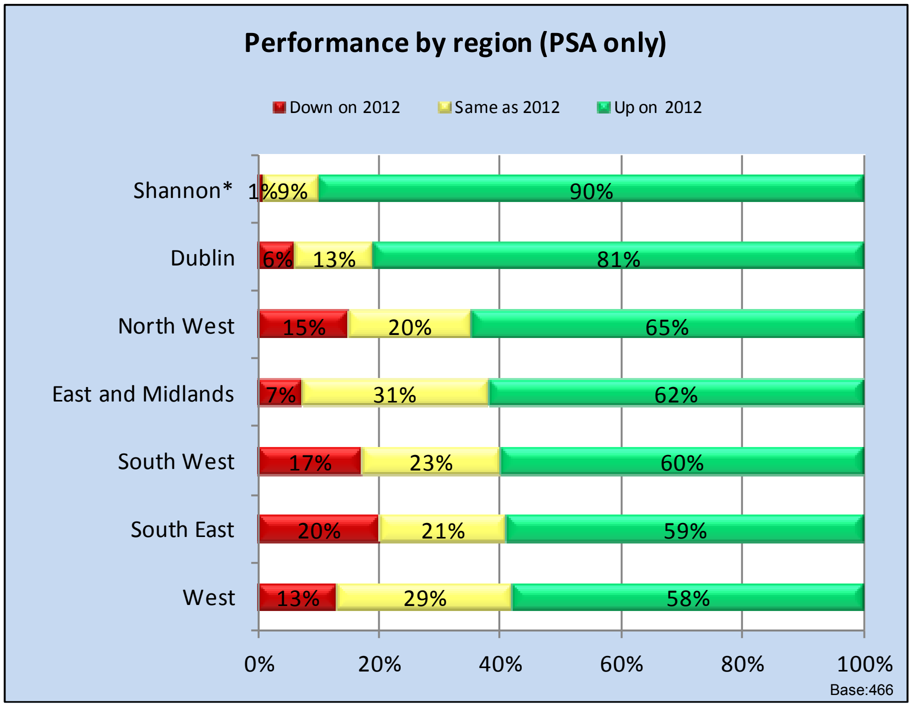
"Increasing costs and the drive from the public to participate in deals which we will not participate in [are issues of concern]"
Restaurant

"VAT at 9% instead of 13.5% means our prices are competitive and in line with the European norm for food"
Restaurant

"The retention of 9% VAT is crucial to attract more visitors local and international ... we must offer great value to drive the numbers upwards"
Restaurant

13. Performance by Region

Here we discuss the performance by region for the PSA sector



**Shannon results need to be treated with caution due to the low base number of hotels, which has a significant bearing on the weighted PSA results*

Improved access through Shannon airport

13.1 The results for Shannon need to be treated with caution due to the low base number of hotels in the sample, but nevertheless, many operators have commented on the significant impact that the increase in flights through Shannon airport has had on their business this year.

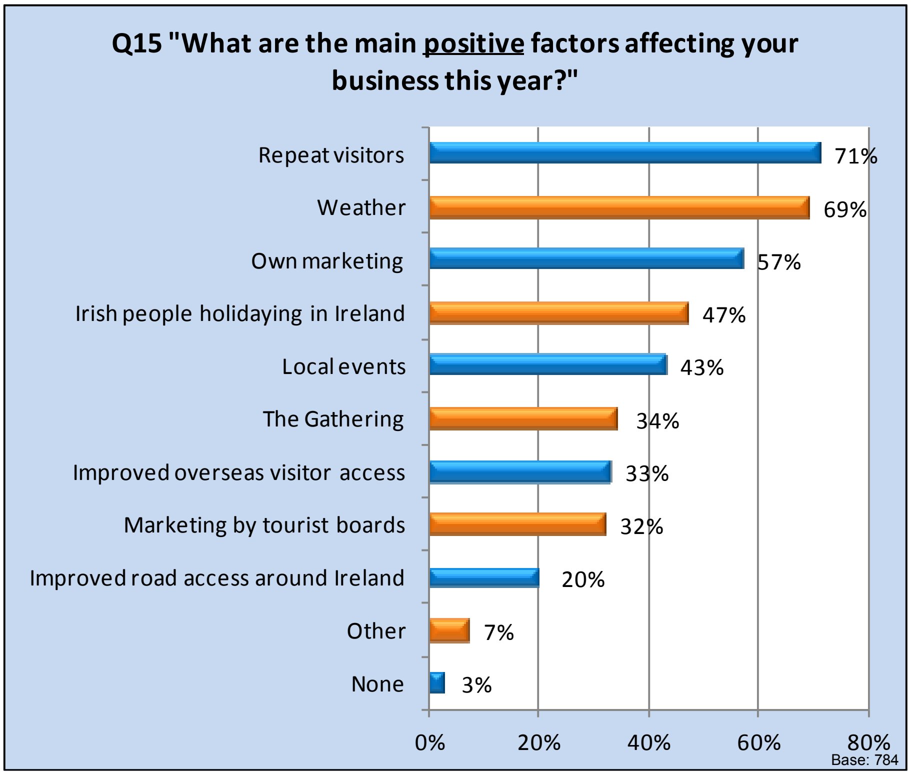
"Shannon airport ... increased international flights allowing increased access to the area"
Hotel

"Shannon's independence has meant a huge increase in business"
B&B

Difference in results between Dublin and the other regions

13.2 All regions of Ireland have fared well this year; however the PSA sector in Dublin has fared especially well, with the vast majority (81%) of weighted PSA operators reporting increased visitors.

14. Positive Factors in 2013



Repeat visitors and the weather – the most frequently mentioned positive factors

14.1 This year's success has been built largely on the ability of operators to attract customers to return to their establishment, and the excellent weather which the country enjoyed this summer. This year's weather may encourage visitors (especially domestic) to return next year.

"The weather we had definitely put people in better form and it encourages Irish people to stay home and take one of two nights at weekends"
Hotel

Own marketing – particularly among attractions and hotels

14.2 Over half (57%) of respondents state 'own marketing' as a positive factor on their business this year to date, and this is particularly true of hotels (68%) and attractions (65%). Comments suggest that attractions are especially active at marketing their own business.

"We've made a conscious effort to market the library to different groups ... an outreach officer promotes to schools"
Attraction

The Gathering – a successful initiative

14.3 There is much evidence that The Gathering has increased tourism business this year. One in three (33%) respondents have experienced increased business due to the initiative and a further one in ten (9%) still expect to see increased business.

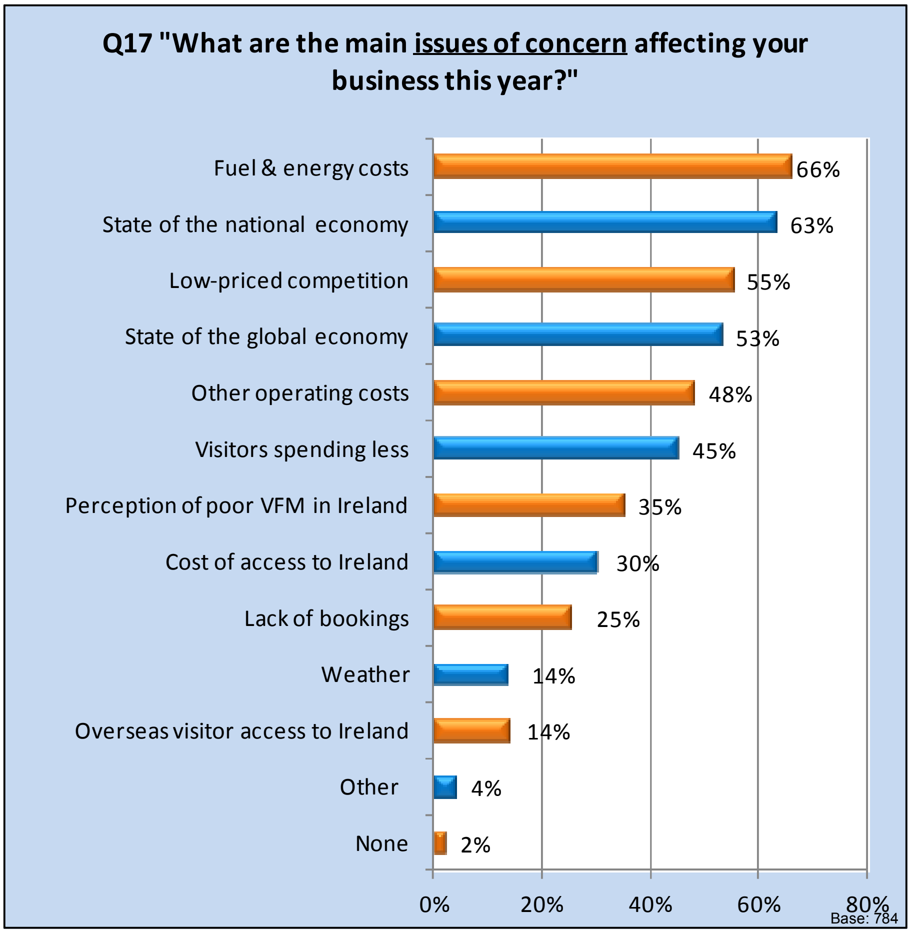
"The Gathering was a huge factor in increased business"
B&B

"I think the funding given to The Gathering events really helped a lot of small festivals get access to national and international advertisements, and that really made people come and see these festivals in a particular area"
B&B

"We got a lot of American and Canadian guests for The Gathering"
B&B

14.4 Another point to note is that there are no significant differences among the seven regions of Ireland, indicating that the benefits of The Gathering have been well spread across the country.

15. Issues of Concern in 2013



Fuel and energy costs – remain the most commonly expressed concern

15.1 Behind the success story of tourism in Ireland this year there are still some significant issues which concern operators, the most frequently mentioned one being fuel & energy costs.

"Increase in oil prices"
Hotel

Economy still a concern, but not like it was

15.2 A fairly high proportion (63%) of respondents have stated 'state of the domestic economy' as a concern again, but uncertainty over the economy is certainly not as bad as it was in previous years. Comments suggest that the industry is looking forward to better days ahead. Financial concerns tend to be more about rising operating costs rather than lack of customers.

"The recession is starting to balance out now and people are starting to spend more nowadays"
Guesthouse

"Room rates and business are holding their own and are not going in the wrong direction"
Guesthouse

16. Appendix 1 – Background and Methodology

Background and Objectives

16.1 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.

16.2 In March 2013, Strategic Marketing, an independent research agency, was commissioned to continue conducting the survey for the next three years.

16.3 Fieldwork for this second wave in 2013 took place between 2nd and 17th September. The objectives were to measure:

- Business performance to date in 2013 in terms of visitor volume – overall and by key markets – and profitability
- Average room yield year to date (hotels)
- Visitor volume expectations for the remainder of 2013
- Positive factors and issues of concern affecting business

Methodology

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

16.5 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.

16.6 Fáilte Ireland provided a database of 3,586 usable contacts (i.e. not opted out) for the survey spread across seven industry sectors (discussed under 'sampling' below). An email was sent 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.

16.7 A total of 633 responses were received to the online survey – a response rate of 18%.

16.8 Following this, we conducted 151 '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.

Sampling

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

Sector	Online responses	Telephone top-ups	Total sample size
Hotels	99	28	127
Guesthouses	52	36	88
Bed & Breakfast	269	1	270
Self-catering	29	24	53
Hostels	31	15	46
Caravan & campsites	13	11	24
Attractions	60	17	77
Golf clubs	9	19	28
Restaurants	71	-	71
Total	**633**	**151**	**784**

Interviews for Contextual Background

16.10 In a separate exercise, we conducted eight qualitative 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.

Appendix 1 – Copy of Questionnaire

Tourism Barometer - September 2013

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

- *Hotel* ❑
- *Guesthouse* ❑
- *Bed & Breakfast* ❑
- *Self catering* ❑
- *Hostel* ❑
- *Attraction* ❑
- *Golf club* ❑
- *Restaurant* ❑
- *Caravan & camping* ❑

(ACCOMMODATION) Please note that the following questions refer to your accommodation business only
(GOLF) Please note that the following questions refer to your tourism 'green fee' business only

(RESTAURANTS) Please note that the following questions refer to your tourism business only, i.e. non-local customers

Q1 Has your business been established since before the start of 2012?

- *Yes* ❑ Go to Q2
- *No* ❑ Go to Q11

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

- *Up on 2012* ❑
- *Same as 2012* ❑
- *Down on 2012* ❑
- *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 2012	*Same as 2012*	*Down on 2012*	*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 2012	*Same as 2012*	*Down on 2012*	*Don't know*	*Not applicable*
Great Britain	❑	❑	❑	❑	❑
France	❑	❑	❑	❑	❑
Germany	❑	❑	❑	❑	❑
North America	❑	❑	❑	❑	❑

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

- *Up on 2012* ❑
- *Same as 2012* ❑
- *Down on 2012* ❑
- *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 2012	❑
Same as 2012	❑
Down on 2012	❑
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 the year compared to the same period last year?**

Up on 2012	❑
Same as 2012	❑
Down on 2012	❑
Don't know	❑

Q9 **How do you <u>expect</u> 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 2012	*Same as 2012*	*Down on 2012*	*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 the year compared to the same period last year from each of the following markets?**

	Up on 2012	*Same as 2012*	*Down on 2012*	*Don't know*	*Not applicable*
Great Britain	❑	❑	❑	❑	❑
France	❑	❑	❑	❑	❑
Germany	❑	❑	❑	❑	❑
North America	❑	❑	❑	❑	❑

Q11 **Are you aware of any Gathering 2013 events that have happened or are happening in your locality?**

Yes	❑
No	❑

Q12 **Are/were you involved in the organisation of any Gathering 2013 events in your locality?**

Yes	❑
No	❑

Q13 **Have you invited or do you plan to invite somebody from overseas to Ireland to attend a Gathering event?**

Yes, have invited	❑
Yes, plan to invite	❑
No	❑
Don't know	❑

Q14 Have you experienced or do you expect to experience increased business due to Gathering 2013 events in your locality?

- *I have experienced increased business* .... ❑
- *I expect to experience increased business* .... ❑
- *No, I have not experienced increased business and do not expect to* .... ❑
- *Don't know* .... ❑

Q15 What are the main positive factors affecting your business this year?

(TICK ALL THAT APPLY. IF THERE ARE NONE, PLEASE ANSWER 'NONE' BELOW.)

- *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* .... ❑
- *The Gathering* .... ❑
- *Other* .... ❑
- *None* .... ❑

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

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Q17 What are the main issues of concern affecting your business this year?

(TICK ALL THAT APPLY. IF THERE ARE NONE, PLEASE ANSWER 'NONE' BELOW)

- *Weather* .... ❑
- *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 bookings* .... ❑
- *Visitors spending less* .... ❑
- *Overseas visitor access to Ireland* .... ❑
- *Cost of overseas visitor access to Ireland* .... ❑
- *Other* .... ❑
- *None* .... ❑

Are there any other issues of concern affecting 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 in administering the Tourism Barometer over the period 2013 - 2015.

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