

How's Business?

Greater Manchester Tourism Business Performance Survey

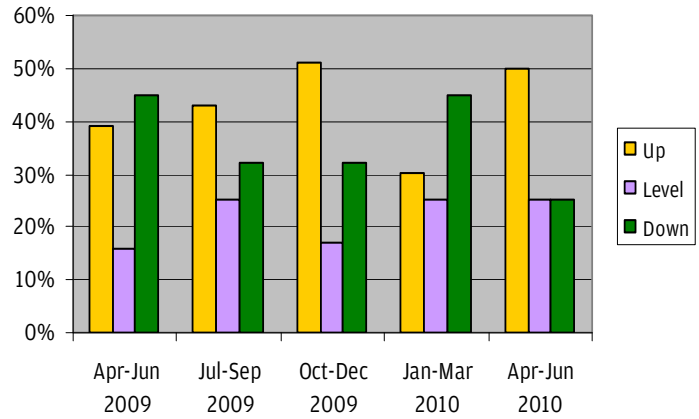
April-June 2010

The How's Business Survey is distributed as four on-line surveys tailored for accommodation providers, eating establishments, visitor attractions, and 'other tourism businesses' within Greater Manchester's tourism industry.

Visitor Numbers

The graph shows how tourism businesses in Greater Manchester reported their visitor figures across the last 5 quarters as compared with the same period the year before.

The April-June results are very positive, with half the sample reporting visitor numbers are up compared with last year. Only a quarter reported numbers were down in comparison with the April-June period in 2009, which is the lowest proportion all year.



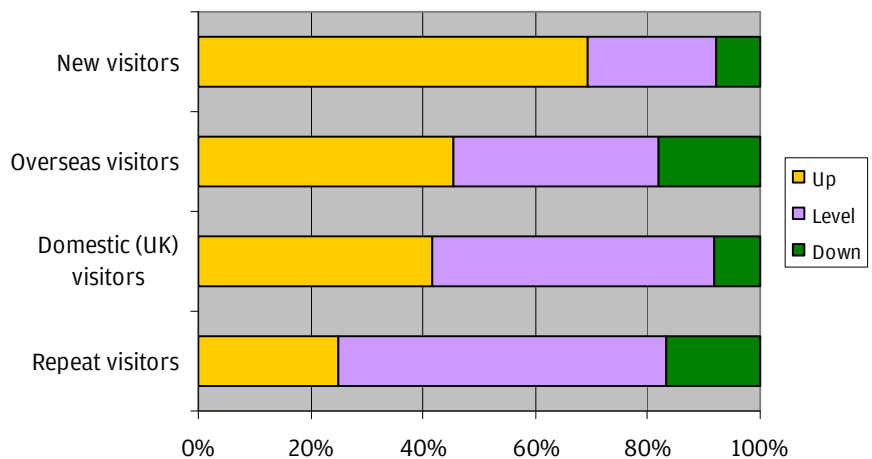
Please note that the small sample size this quarter greatly limits the statistical significance of individual sector analysis, and for this reason the April-June results are not reported by sector but by overall industry trends.

Types of Visitor

The graph shows how tourism businesses in Greater Manchester reported their visitor figures had changed across different visitor markets (domestic/overseas, new/repeat visitors) compared with the same period in 2009.

Results suggest new visitors are the most rapidly expanding market in Greater Manchester. Over two thirds (69%) of tourism businesses reported that numbers of new visitors were up in comparison with last year, while a quarter (25%) reported that numbers of repeat visitors had increased.

Just under half the sample (42-46%) reported that numbers of overseas visitors and domestic visitors had increased in comparison with April-June 2009. A far smaller proportion (8-18%) felt that visitor numbers from these markets were down.

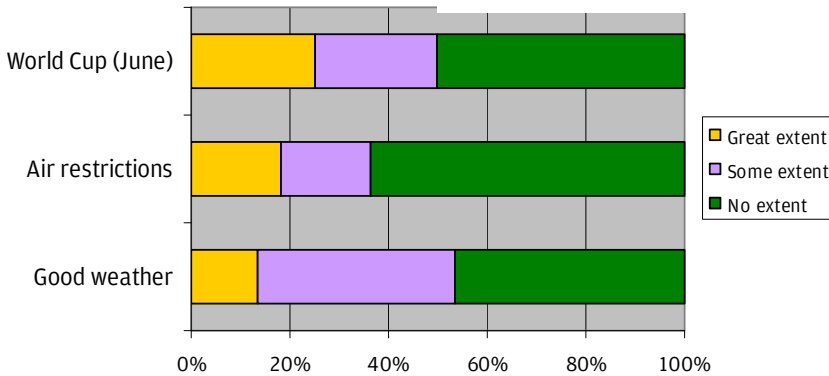
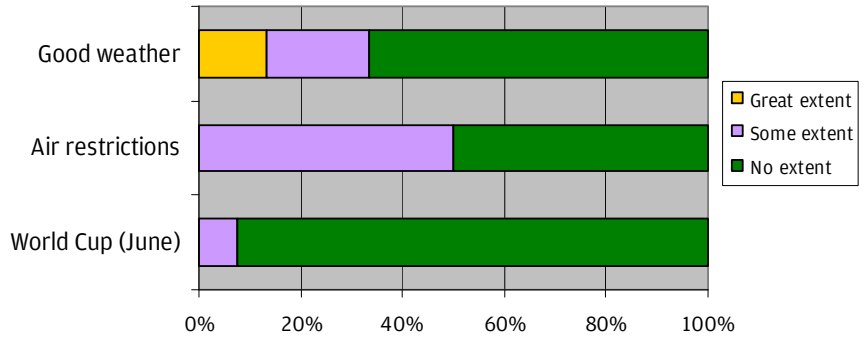


Factors Affecting Business

In this quarter, respondents were asked to what extent the following factors had both affected their business: Air restrictions (due to the volcanic ash), early rounds of the World Cup (June), and good weather.

The graph opposite shows how tourism businesses in Greater Manchester reported the **positive** impact these factors had on their business.

Air restrictions had positively affected business to “some extent” for half the sample (50%), while good weather was reported to have affected business to “a great extent” by 13%.



The graph opposite shows how tourism businesses in Greater Manchester reported the **negative** impact these factors had on their business.

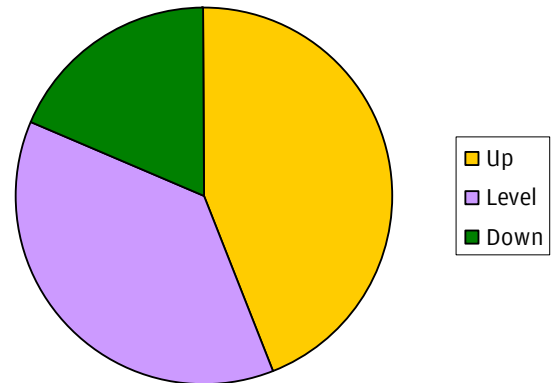
All factors were more likely to be reported as having a negative impact than a positive impact, with a quarter (25%) reporting that early rounds of the World Cup had negatively affected

business to “a great extent”.

Forecasts

Respondents were asked what their overall expectations were for this year compared with 2009, whether they expected business to be up, level, or down.

44% of the sample of tourism businesses forecast business would be up this year, 38% reported it would be level with 2009, and 19% reported that business would be down.



These results are level with the forecasts made last quarter (January-March).

Participation : 31% accommodation providers, 31% visitor attractions, 25% eating establishments, and 13% ‘other’ tourism businesses. All 10 districts of Greater Manchester are represented in this survey, with a quarter (25%) from Manchester.

