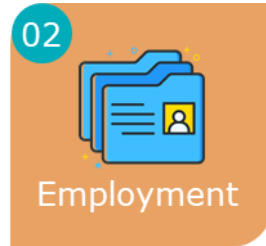


Sector Specific Issues & Barriers



Click on any button to jump straight to that section



The Headlines (1)

01

- Most of the responding businesses (**93%**) are currently closed.
- Almost half of businesses (**45%**) state that they **have no employees at the moment**.
- **Six in ten businesses** are using the Pandemic Unemployment Scheme (**PUPS**) and/or the Temporary Wage Subsidy Scheme (**TWSS**).
- Few enterprises have applied to business supports, almost half believing that their business would not be eligible.
- About a third (**35%**) would like to **avail** of the **commercial rates reduction break** announced on 2nd May.
- **About two thirds** of businesses plan to **re-open in 2020** (7% are already open). Most of them (**61%**) **plan to re-open in July**.*
- A green light from Government to re-open is overall the most important factor in their decision.



* Survey carried out prior to announcement that re-opening could take place on 29th June for some tourism and hospitality services



The Headlines (2)

01

- While views are divided over whether operating within social distancing guidelines is possible at all, the challenge facing all businesses is how to do it without operating at a loss
- The industry would welcome the following in particular:
 - Clear health & safety guidelines for their specific sector
 - Support on how to operate within the guidelines profitably
 - Focus on domestic marketing if quarantining rule does not change
 - Financial support to survive into 2021 – many do not see how they can make any profit this summer, and they rely on the summer income to get through the winter



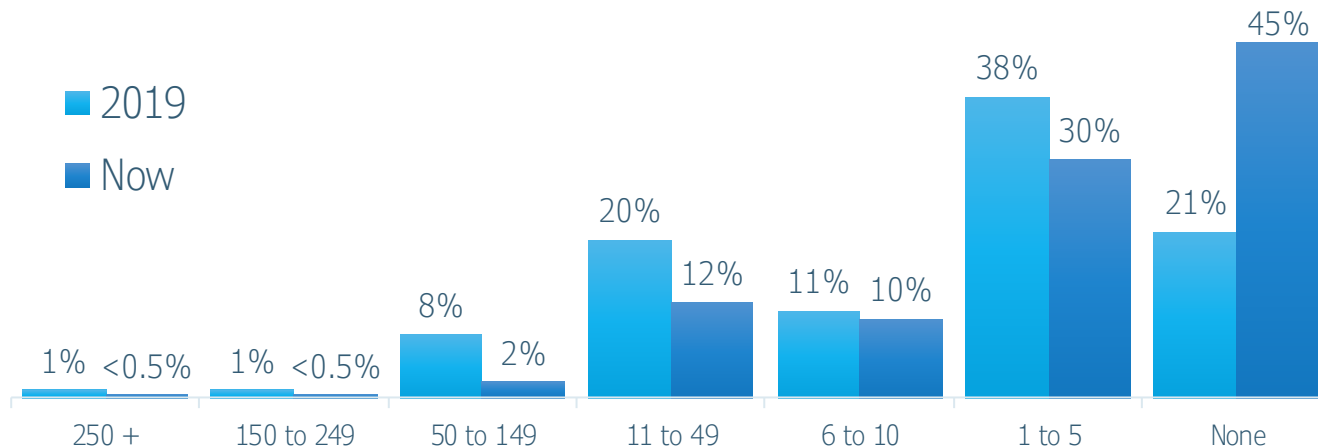


Employment – 2019 vs Currently

02



Base Size 1,609



Many businesses are still closed and have been forced to temporarily lay off staff.

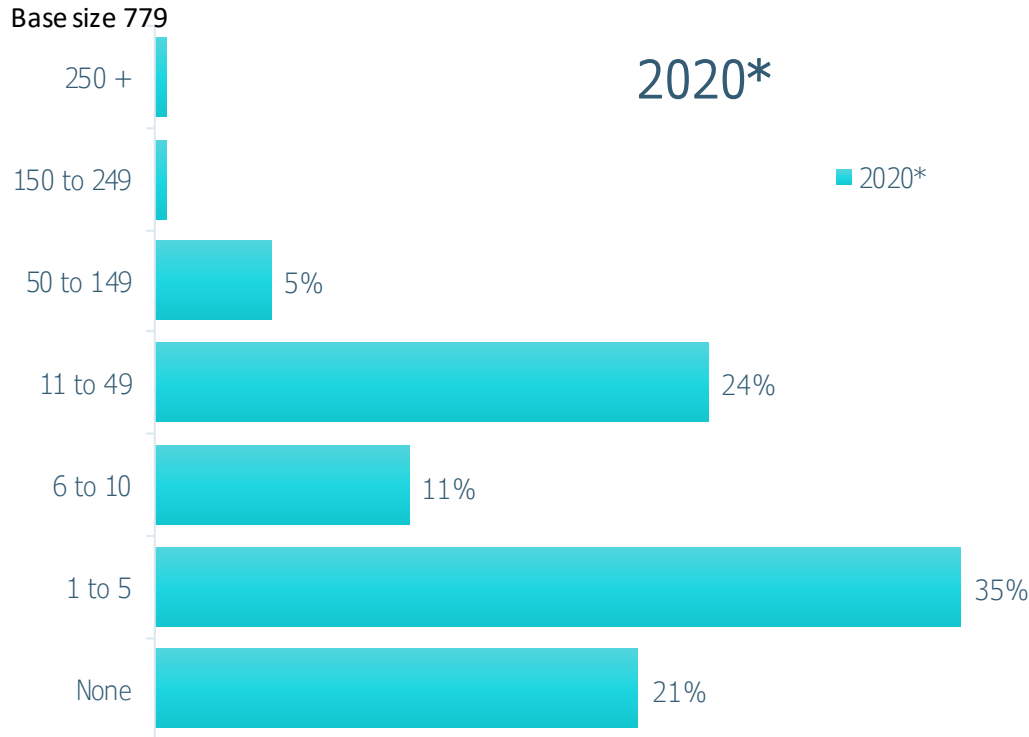
More than twice as many businesses have no employees compared to last year.

Q3. In 2019, how many permanent staff were employed at your business?

Q4. Currently, how many permanent staff are employed at your business?



02



*Businesses planning to re-open in 2020

However, there are some grounds for cautious optimism.

Most businesses planning to re-open this year are planning to re-employ staff, though perhaps not at the same level as previously.

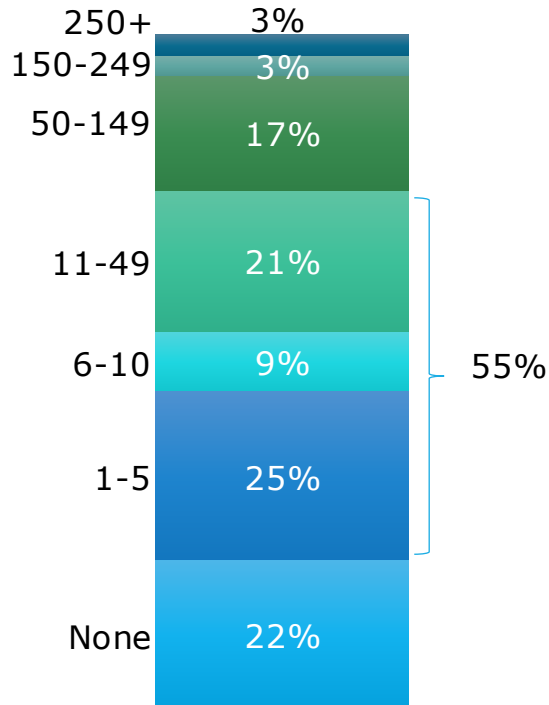


Employment – Staff Temporarily Laid Off

02



Base: 919

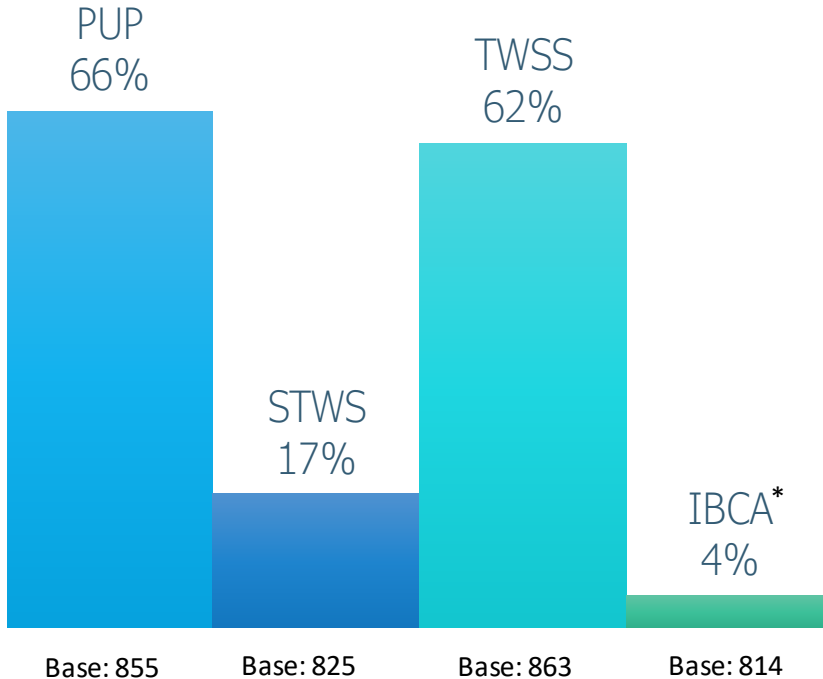


Just over half of businesses have let between 1 and 50 staff go temporarily.

Two thirds of responding hotels have temporarily laid off more than 50 staff.



02



Most business which employ staff have opted for the Pandemic Unemployment Payment or the Temporary Wage Subsidy Scheme.

The Shorter Term Working Scheme is less popular, because many businesses are not open under current restrictions (about 93% of the sample).



Q.6 How many of your staff are now receiving the following Covid-19 related unemployment payments?
Total adds up to >100% as businesses may have used multiple supports for workers.

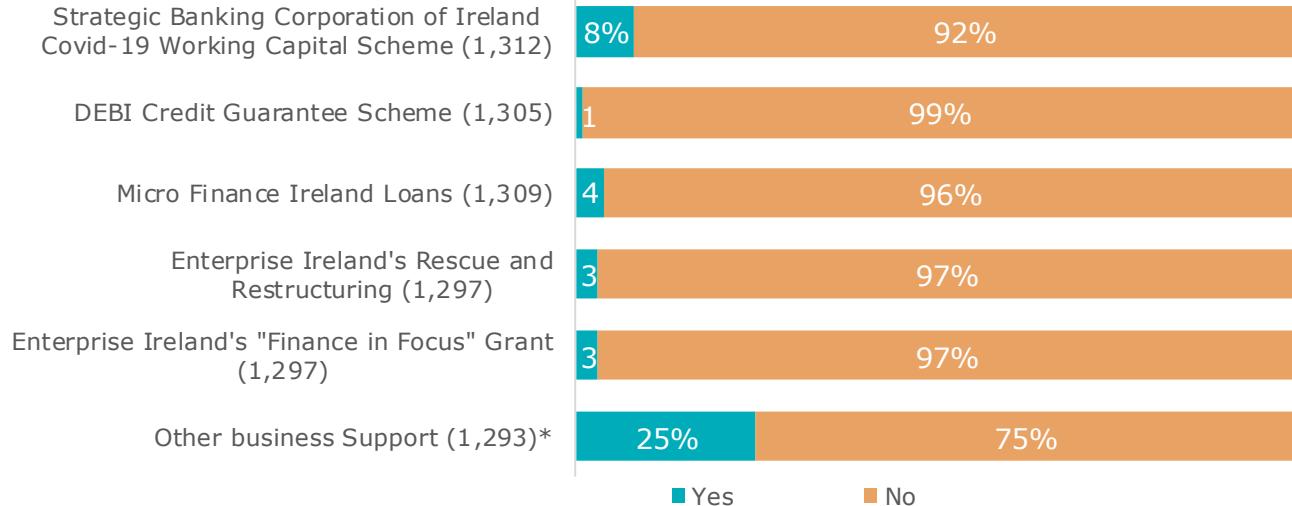
*Illness Benefit for Covid-19 Absences



Existing Business Supports

03

What Business Supports have been applied for



Many businesses have not applied for business supports as yet – the reasons for not doing so are explored at [slide 12](#).

For each support, between 40% and 65% of applicants are awaiting a decision.



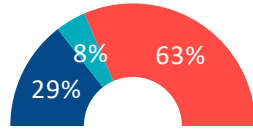


Status of applications

03

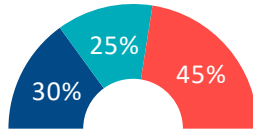
Strategic Banking Corporation of Ireland Covid-19 Working Capital Scheme

Base: 118



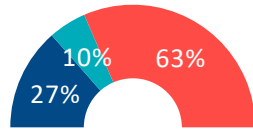
DEBI Credit Guarantee Scheme

Base: 20*



Micro Finance Ireland Loans

Base: 52*



*Caution low base

What is notable is that among those who have applied for business support, most are still waiting to get a decision. This may be due to the timing of their applications.

See [Appendix II](#) for status of DBEI supports on 21st May 2020.

Graph Key

- ◆ Yes
- ◆ No
- ◆ Awaiting Decision



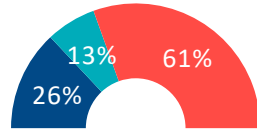
Q.8 Has your application been successful?



03

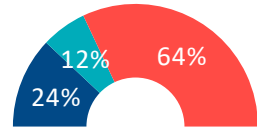
Enterprise Ireland's Rescue and Restructuring

Base: 38*



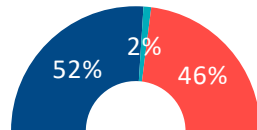
Enterprise Ireland's "Finance in Focus" Grant

Base: 41*



Other business Support

Base: 344



*Caution low base

Other Business Supports

Other business supports mentioned – mainly Local Enterprise Office (LEO) Trading Online Vouchers and Business Continuity Vouchers and support from banks (loan deferrals, overdraft extensions, etc).

Graph Key

- ◆ Yes
- ◆ No
- ◆ Awaiting Decision



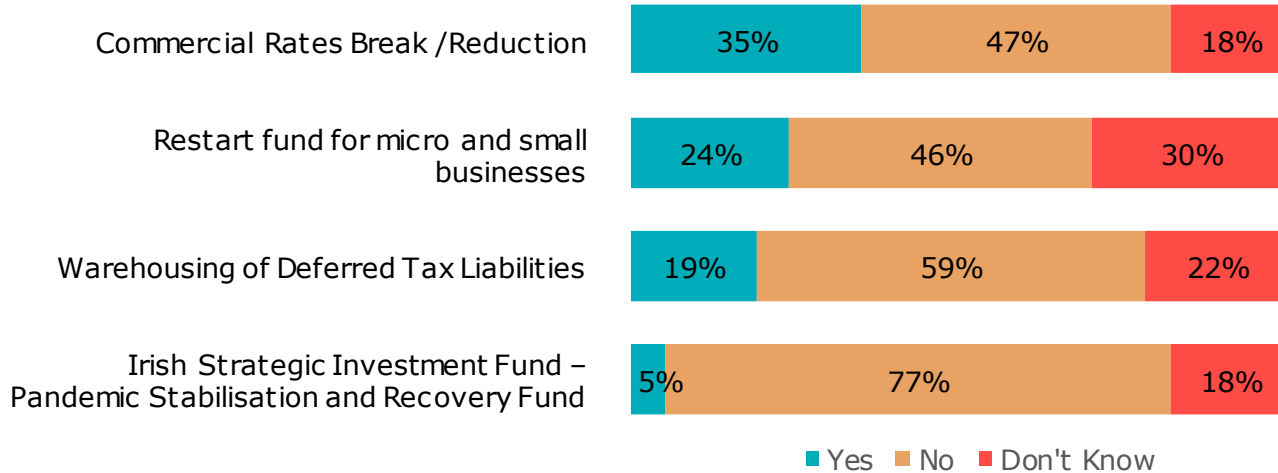


Additional Business Supports

03

What Business Supports are of interest?

Base: 1,614



Commercial Rates Break/Reduction is considered most interesting amongst the measures announced on 2nd May, with over a third of businesses planning to avail/having availed of the support.



Q10. Do you plan to avail / have you availed of the following business supports?

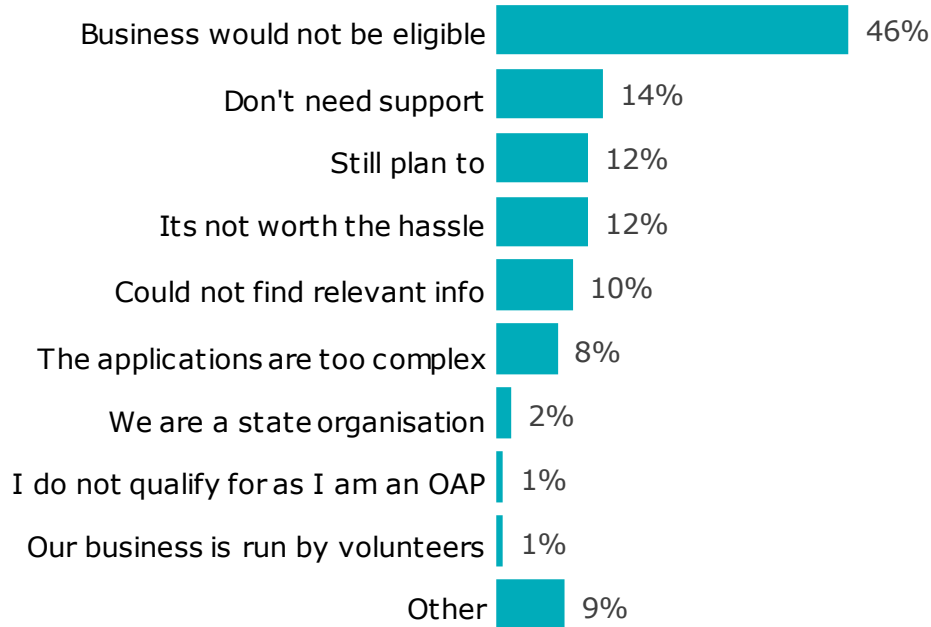


Why Business Support Not Sought

03

Why has your business not sought support?

Base: 435



Almost half of businesses who have not sought support believe that they would not be eligible for support. While circa 1 in 7 claim that they don't need support. More education may be needed as some businesses decided against seeking support because 'its not worth the hassle' (12%) or 'could not find information on relevant schemes' (10%).

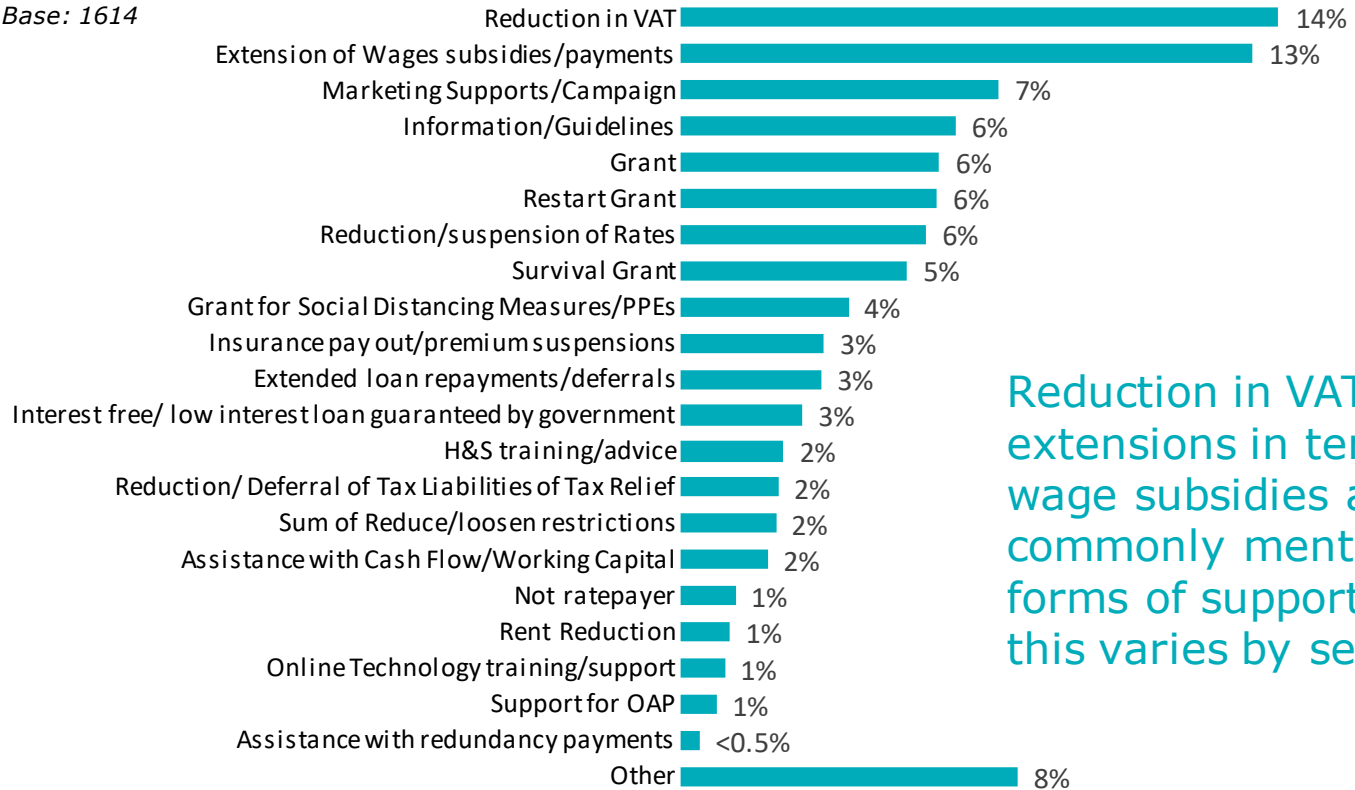




Other Business Supports Mentioned

03

Base: 1614



Reduction in VAT and extensions in terms of wage subsidies are most commonly mentioned forms of support, though this varies by sector.



Q12. What other business supports does your business need to help mitigate the impact of Covid-19?

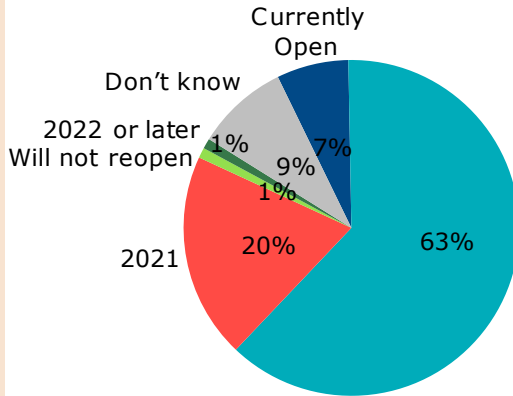


Re-opening Q14 15 17

04

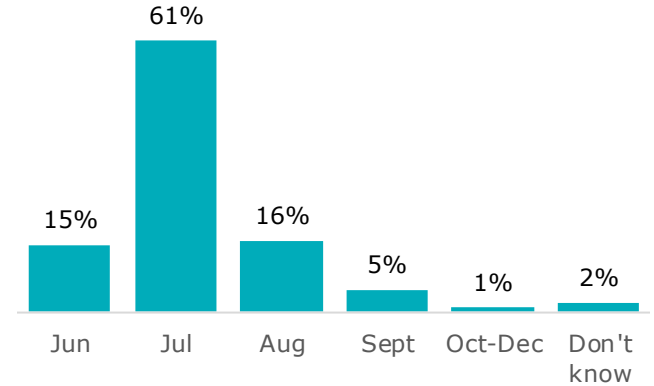
Do you expect to re-open in 2020?

Base: 1,236



Planned re-opening dates 2020

Base: 723



About two thirds of businesses expect to re-open in 2020. Amongst those expected to re-open this year, 61% plan to do so in July, indicating that the majority of businesses plan to recommence operations as soon the 'Easing of Covid-19 Restrictions' are lifted for the industry on July 20th.





Re-opening Businesses – Barriers

05

Relative importance of factors affecting re-opening

Base: 987



On deciding what needs to be in place for businesses to re-open, 'Gov't says that we can open' ranks as the highest priority, followed by 'low risk infection to staff/us' and 'sufficient enquiries/bookings.'

Respondents have been asked to rank their top 3 priorities that need to be in place in order for them to re-open. 'Total Score' has been calculated by awarding 3 points for 1st place, 2 points for 2nd place and 1 point for 3rd place. The ranking is ordered by total score.

OPEN

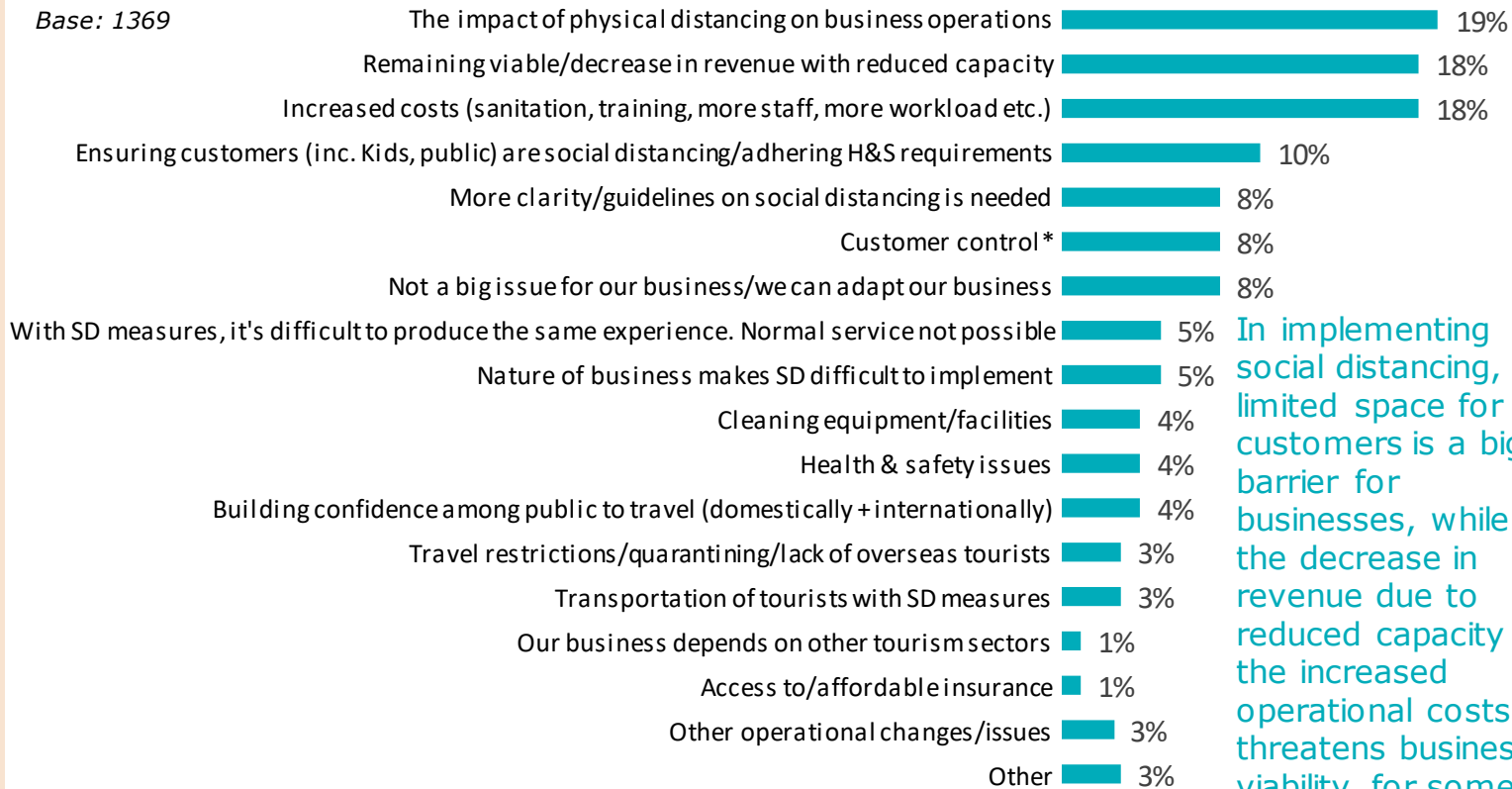
Q18. What needs to be in place for you to re-open?



Re-opening Businesses – Other Barriers

05

Base: 1369



In implementing social distancing, limited space for customers is a big barrier for businesses, while the decrease in revenue due to reduced capacity & the increased operational costs threatens business viability for some.



Q19. What are the main barriers your business will have to overcome in implementing social/physical distancing and adhering to public health requirements?

*Customer Control e.g. Staggering Meal Times, Dining Space, Change layout, One Way Systems, Managing Communal Areas etc.)



Activity providers

05

- Activities involving transport pose significant distancing challenges – greatly reduced capacity makes some activity businesses unviable
- Some instructors have no choice but to be hands on – e.g. for rescues or when assisting beginners
- Very hard to get young children to maintain distance
- Equipment needs to be sanitised in between customers, adding to costs
- Some outdoor operators see no issues with distancing
- Affordable insurance is still a major issue for the sector
- Access to restart/survival grants is important as many are not ratepayers

"I run a watersports centre and passenger boat. With social distancing regulations we will be operating at 20% capacity, which is not sustainable and will result in permanent closure"

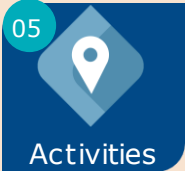
"Inexperienced riders need assistance when mounting/dismounting horses/ponies"

"How do you social distance children in an activity centre?"

"I will have to limit numbers but as I often work with small groups and outside this is not a major problem"

"We need our customers to wear our suits and helmets. We have to convince them our equipment is virus free."

05



Activities

Base: 146

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid -19 and its impact on your business?



06

- Indoor attractions face significant challenges with distancing – some operate in confined spaces or have pinch points
- Some outdoor attractions see no significant issues
- However, some parts of outdoor attractions are affected also, such as cafes, toilets and other touch points
- Where capacity has to be reduced, this poses significant challenges with reduced turnover, while costs increase because of extra cleaning
- Some attractions have a viable plan with one-way systems or pre-booked timed entry

"For any establishment with solid walls there is a limit to the number of people that can be in a space while maintaining social distancing."

"It's a historical building with narrow stairs so social distancing will be difficult."

"We have developed a staggered entry online booking system"

"My facility is small but it can operate a one way system, in one door and out another."

06



Attractions

Base: 202

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid-19 and its impact on your business?



07

- Social distancing in airports is very difficult to achieve, and it is also costly
- Accommodating passengers on planes can be achieved safely, but the challenge lies in making it economically viable
- 14 day quarantine period is expected to be a barrier to international travel

"It is not practical from an operational perspective to enforce 2m social distance in airports"

"Load factors on planes. That said, safety plans are in place to ensure economic loads can be safely accommodated"

"Self isolation for 2 weeks on return from overseas travel – masks and distance measures can do the same job"

"14 day quarantine period is a huge barrier to getting tourism and travel moving again"

07



Aviation

Base: 6

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid-19 and its impact on your business?



08

- B&B operators face the challenge of social distancing within a confined space
- Remedies include staggered breakfast times and no buffet
- With significant extra cleaning required, operators face higher costs for possibly less income (fewer guests)
- Essence of warm welcome in a B&B may be lost – distancing makes it harder for operators to socialise with their guests
- As a B&B is often an operator's home also, and operators are often elderly, some are concerned about bringing the virus in
- Some B&Bs rely heavily on the overseas market, which they now expect will be absent in 2020, and they feel they can't compete with hotels for domestic tourism

"Breakfast time would be the biggest area, ensure staggered breakfast times, no buffet for cereals, juice etc. Guests to make prior order and we will allocate times."

"Extra staff to manage fewer guests"

"The chat, cuppa and giving guests our time were the highlight of their stay and our business"

"Our main concern will be with bringing the virus into our home"

"We depend on the overseas market. We will only get the domestic market when the hotels are full."

08



B&B

Base: 215

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid-19 and its impact on your business?



09

- Some caravan parks / campsites are optimistic about providing a safe environment because it is outdoors and they have space
- However, most see challenges in how toilet blocks, showers, the shop and any other communal areas are managed
- Some call for clarity on toilet & shower block policy
- The significant extra cleaning means higher staff costs or more work for the owners
- Some say that encouraging children to socially distance will be hard, as it goes against the camping experience
- This sector has a shorter season than most sectors in the tourism industry – there are calls to be able to open sooner

"It is extremely easy to social distance while camping. Our shower cubicles are all separate and we have a large amenity block."

"We need to know can we open toilet/shower blocks, kitchens, laundry rooms etc, as in Holland, Germany, Sweden & Benelux countries, parks are not allowed to open them so far. This dictates our bookings going forward."

"Facilities such as toilets and showers will have to be severely monitored and reduced."

"Our season, provided reopening takes place on 20/07/20 and we deem it worthwhile, will only last 6 weeks."

"Children tend to congregate in groups as part of the campsite experience"

09



Caravan & Camping

Base: 44

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid -19 and its impact on your business?



Coach operators

10

- Social distancing means much reduced capacity, and making it economically viable to operate is a huge challenge for this sector – some say it is not possible
- A second significant issue mentioned is consumer confidence to travel by group transport
- One operator says that screens need to be fitted to maintain capacity
- Limited international travel and quarantining is likely to hit some operators very hard
- Some operators claim additional financial supports are needed for the sector to implement social distancing

"Capacity reduction on board coaches is too severe to be able to operate tours"

"Rebuilding confidence in our product as passengers move away from group transportation due to health fears."

"If we got a booking for 20pax, this would mean a 52 seater to work within the 2 metre restrictions. It will not be economical to do this as the client would expect to pay for a 23 seater vehicle so if we have to use a 52 seater, our running costs would be up"

"Retro fitting screen barriers in our coaches will have to happen to allow near full capacity or close to it on our coaches"

"At the moment all coaches are parked up in the yard and all incoming tours for the season are cancelled"

10



Coach Operators

Base: 22

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid -19 and its impact on your business?



11

- The issues facing DMCs cut across many of the other sectors, as DMCs work with them
- Coach travel is a challenge because of the significant extra space required in the vehicle
- Dining experiences are often key to conferences and incentive trips, but there are concerns that socially distanced dining ruins the experience
- No-one yet knows how the events industry will function
- Lack of international travel and quarantining will hit DMCs hard
- However, some are thinking creatively about how to survive on quality and originality of offering

"Lower numbers on coaches, making per person costs higher"

"How can anybody have a gala dinner/networking event with 4 people on an 8 foot round table?"

"No road plan as to what a conference will look like"

"Tourism will return – it's about staying alive, maintaining contact with clients, new ideas, and being ready with experienced staff when it returns"

"Rethinking of the tourism industry in Ireland that is based on growth through quality and sustainable practices as opposed to volume. Important to see how a buoyant and resilient industry can emerge based on reductions in visitor numbers."



Base: 32

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid -19 and its impact on your business?



Event / festival organisers

12

- Event / festival organisers face significant challenges in how to maintain social distancing while also making the event / festival economically viable
- The extra cost needs to be absorbed somewhere – venues charge less, organisers pay more, or customers pay more
- Events / festivals naturally encourage people to mix, so there are concerns about how to maintain atmosphere at a distance, or how to make sure attendees comply
- Organisers are desperate for ideas on how they can viably operate – some say it is not possible
- This may be one of the last tourism sectors to recover

"We need large numbers of people in a festival context to make it viable. That is unimaginable into 2021."

"Human nature is to interact with people, but this is something which we have to address constructively, firmly and with positivity."

"It will be extremely difficult to have festival events with social distancing. We are investigating what we can do."

"We are a Mass Gathering Festival and we will need to carve a whole new way of working our Festival"

"We need to look at alternative venues – outdoors, marquees, site specific etc. and all these spaces need expertise around H&S/ crowd control, technicalities, marketing etc. – but at present we don't have supports"

12



Event/Festival

Base: 59

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid -19 and its impact on your business?



13

- Playing golf in itself does not pose major issues for social distancing – wide outdoor spaces and players don't need to be in close contact to play the sport
- But golf clubs rely on revenue from bar and restaurant facilities, which will be lower due to distancing
- Some say they will incur extra costs for cleaning
- Also, some clubs rely heavily on green fees from visitors – if the overseas market is key then they are hard hit
- Accommodation being closed has a knock-on effect on golf

"Not a problem on the golf course"

"Get green fees into golf clubs"

"Reduced capacity in the bar/restaurant facilities, with no subsequent reduction in costs in terms of staffing required and indeed we may need to have increased staffing levels due to the health and safety measures required for the hospitality industry."

"With our dependency on overseas and domestic visitors, and being located in an isolated rural area, we rely hugely on the availability of tourism accommodation, and the late opening ... has presented us with additional losses of income."

13



Golf

Base: 21

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid-19 and its impact on your business?



14

- Some guesthouse operators say they have the space to ensure distancing, and with some adjustments, can operate viably
- Whereas others, especially if space is more confined or bathrooms are shared, struggle to see how they can operate
- Breakfast times need to be staggered, and some also say they can't use all the bedrooms at the same time – which could mean they can't afford to operate
- Many are small, family-run businesses not employing staff, and some say they fall through the gaps in financial support
- Those relying on overseas markets will be hit particularly hard – others see opportunities with the domestic market

"As we are a new build guesthouse we are able to maintain social distancing without too much of a problem. How we get this message out is the main problem without jeopardising our colleagues with older properties & shared bathrooms"

"Breakfast will have to be staggered. Our corridors are 1.4 metres wide so people would have to check that the corridors are free before they leave their rooms. Sanitising is going to be painfully slow and costly labour wise"

"This would be an excellent time for Fáilte Ireland to launch a TV advertising campaign for staycations"

"No funding seems to be available for small family run businesses who do not employ outside staff... this was our only source of income"

14



Base: 46

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid -19 and its impact on your business?



15

- Compared to other types of accommodation, shared dormitories present particular challenges for distancing
- Greatly reduced occupancy means some cannot see a way of making it financially viable to operate
- But having a strong presence in the family market could help to maintain reasonable occupancy
- Overseas markets are important to this sector, and so quarantine requirements will have a significant impact
- Some operators would appreciate clear guidelines on how to operate safely

"Hostels have shared dorm rooms and it's very difficult to social distance here ... one person per room is all ok but will not pay the bills"

"Reducing drastically the occupancy allocation to a minimum. The hostel consists of dormitory accommodation. May not be financially viable."

"The vast majority of our guest base comes from abroad. With no flights and isolating they are obviously not going to visit until Covid-19 is resolved."

"It would be good to have a list of measures to keep everyone safe that all premises or at least all similar premises can follow and display and for guests to know what is being done to keep the virus out."

"No issues as plenty of size to accommodate individual families"

15



Hostels

Base: 22

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid-19 and its impact on your business?



16

- Hotel operators are trying to find a new business model which meets health & safety guidelines while being financially viable
- There are many calls for clarity on the health & safety guidelines – what is and is not allowed in hotels, distances, max. numbers of people at events, occupancy level
- Challenging spaces for distancing include kitchens, lobbies, bars, toilets and leisure facilities
- Those relying on events such as conferences and weddings expect to lose a significant part of their business this year
- But some see opportunity to use the extra space in other ways
- Keeping guests distanced after consuming alcohol is hard

"Costs involved in creating a safe environment. Staffing. Making the new business model economically viable."

"More clarity needed on weddings, max number of persons, % of bedrooms that can be opened asap"

"Need absolute clarity ... on "limited" basis – what does that mean?"

"Might be difficult to social distance people under the influence of alcohol"

"Breakfast will be a challenge but it is all achievable. Technology will play a key role."

16



Base: 312

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid-19 and its impact on your business?



17

- A number of businesses have described themselves as inbound tour operators – some are tour operators, and others work closely with tour operators to serve the inbound market
- The issues facing tour operators cut across the many different sectors they work closely with – accommodation, restaurants, pubs, attractions, coaches, airlines etc
- Large groups will be particularly hard to service, especially because of distancing on transport
- But some will focus on family groups
- The 14 day quarantine rule is expected to all but eliminate international leisure travel while in force

"Reassuring customers that we can offer physical distancing on airlines, coaches, accommodation, restaurant, bars and visitor attractions and if the consumer can bare the additional costs involved"

"We rely on accommodation, restaurants and museums etc in our supply chain so are hugely dependent on any implementations they make"

"As most of my business is made up of American golfers, Covid regulations will destroy my business."

"We plan to focus more on private groups of same family"

"14 day quarantine means zero international business until lifted"

17



Inbound Tour Operators

Base: 60

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid -19 and its impact on your business?



18

- The main challenge facing pubs & bars is how the business will be financially viable if customer numbers are greatly reduced to enable social distancing and costs increase to operate safely
- Many operators do not have premises spacious enough to easily implement distancing measures and make ends meet
- There are calls for clarity on health & safety guidelines, and what exactly is expected of pubs & bars
- Some also want to re-open earlier to serve food, but do not have or cannot obtain a restaurant license

"I do not plan on re-opening with physical distancing requirements in place. It would not be commercially viable."

"Capacity in the business will be reduced to 35 - 40%. Will need additional staff to work than normal because of need for sanitising, controlling entries, seating, bathrooms etc."

"If we had the actual guidelines from the government maybe we can get started and do whatever has to be done to ensure my staff and customers are safe"

"Clarity on bars like ourselves who have been serving food since the seventies cannot open as a restaurant without a restaurant certificate"

"If we have a 70/30 split between food and beverage but can't afford a restaurant licence, what do we do in June?"

18



Pubs & Bars

Base: 27

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid-19 and its impact on your business?



19

- At the time of surveying, there was much debate in the news over whether social distance should be 2m or 1m
- Many restaurants say they can't make ends meet with a 2m distance, as the income won't cover their costs
- And some restaurants say costs will be higher than normal due to needing extra staff
- As well as keeping customers distanced from each other, additional challenges are found in the kitchen, serving tables and toilets

"Not possible to have enough people in the restaurant – we will operate a takeaway only"

"2 metre rule will close our business; 1 metre rule means we might survive"

"Increased staff to seat/control/direct people, and to implement extra cleaning/disinfecting"

"Very difficult to implement social distancing while serving food to tables, also ... in a commercial kitchen, and access to the toilets it will be very difficult"

"Restructuring kitchen layout"

19



Restaurant

Base: 87

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid-19 and its impact on your business?



20

- How easily retailers can operate depends partly on how spacious their shop is
- Many operate in confined spaces and face challenges, whereas some are fortunate to have space to utilise for distancing
- Sometimes customers touch items they don't buy, and this is a challenge for keeping a shop a safe environment
- Some are concerned about non-compliance of customers
- Retailers differ in how much they depend on tourism, and specifically overseas tourism

"Some of the retail space is narrow and has bottlenecks"

"We have a large studio & shop so we should be able to have a safe space for staff & visitors"

"Having to police non compliant customers on the shop floor; also there is a lot of the unknown in relation to the handling of goods"

"Our product is geared towards the overseas market and the lack of overseas tourists will decimate our business. Current stocks will make targeting an Irish market impossible."

"Overcome fear of trying on clothes. Rules for fitting room."

20



Retail

Base: 32

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid-19 and its impact on your business?



Self-catering

21

- In some ways, the self-catering sector is in a much better position than most other sectors because accommodation is self-contained
- However, as other tourism sectors struggle, this sector may be hampered too – e.g. attractions and restaurants closing
- Operators will also have to take more care over cleaning in between guests and may leave extra time in between bookings – this adds to costs and lost days of sales
- The overseas market is expected to stay away for some time, and so the focus is on trying to attract the domestic market

"As it's self catering, we feel social distancing will be easily managed"

"Fortunately I run a self catering holiday home business. Our main worry will be the cleanliness of the units after a departure."

"Overseas visitors are not going to travel to Ireland in the near future. We must rely on our domestic market. Self Catering holidays in Ireland are the safest and have the lowest risk of infection."

"Pubs, cinemas and other attractions not open until August, making the destination less attractive"

"Confidence that everything in the property is cleaned enough to be deemed virus free after each booking"

21



Self-Catering

Base: 143

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid-19 and its impact on your business?



22

- For walking tours, there are challenges in guiding a group with social distancing and it may mean reducing numbers per group, but at least the experience is outdoors
- A further challenge with walking tours is how to manage stops for toilets, food and photos
- When on transport, the challenge is harder because the space is confined and so far fewer passengers can be accepted
- Strong reliance on the overseas market may mean that some guides have little or no work this year

"For walking tours I do not see physical distancing as an issue as I tend to only have 2 – 6 people max and it's an outdoor experience"

"How could you tour guide while social distancing? I would need some funds to buy my own whispers and only guide outdoors... really not sure"

"The current quarantine restrictions... have ended inbound individual and group travel. Until these restrictions are lifted, there is no possibility of work resuming for me."

"Tour Guides usually work with overseas groups. No inbound travellers & 2m social distancing means no market"

"Seating in tour coaches, separation at sites, attractions, toilet stops, food stops, photo stops"



Base: 38

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid-19 and its impact on your business?



23

- Many venues see how they can maintain social distancing with increased staff and reduced attendee numbers at events
- The issue is how they can do that profitably
- There are calls for greater clarity on how venues are expected to operate, e.g. in relation to group sizes

"Finding a balance between adhering to social distancing guidelines and operating in an economically viable way"

"Having the staffing is not a problem to physically maintain the hygiene requirements and the social distancing. It is making a profit at the end of it all ... it's a business not a hobby"

"Just the lack of clarity and draft IHF / HSE / Fáilte Ireland Guidelines lacked specific details. Section 23 totally lacking on group sizes etc. We are under huge pressure to move weddings in Sept and Oct and beyond, we have nothing to support us in trying to get couples to go ahead in these months."

"Need clarity on reasonable requirements from HSE to allow our business to be viable"

23



Venues

Base: 28

Q19. What are the main barriers your business will have to overcome in implementing social / physical distancing and adhering to public health requirements? / Q20. Are there any other issues you wish to raise with regards to Covid-19 and its impact on your business?



Appendix 1: Background & Methodology

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Background and Objectives

The Irish tourism industry is facing an unprecedented challenge in 2020 as the COVID-19 pandemic sweeps across the world.

Travel restrictions and lockdown measures have stopped the industry in its tracks. Since the Government published its roadmap for re-opening Ireland, Fáilte Ireland has been making every effort to support enterprises to re-open and recoup what they can in 2020 while adhering to official guidelines.

The purposes of this wide reaching survey is:

- To determine the current position of tourism businesses.
- To assess what businesses need in the short term to allow them to re-open efficiently and effectively in the coming months.

Methodology

A quantitative approach was taken and an online survey issued to relevant subscribers to Fáilte Ireland's ezine on 21st May 2020.

An email was sent to most contacts on the Fáilte Ireland's Customer Relationship Management database containing a link to the online survey and an explanation of the survey objectives. Contacts such as public sector bodies and local authorities were excluded where possible due to the nature of the questions, employment in enterprises, business supports used, etc.

ITIC also collaborated in the distribution of the survey link to its membership in order to reach as broad an audience as possible within the industry.

Fáilte Ireland and Strategic Research and Insight worked together in consultation with ITIC and Tourism Ireland to produce the questionnaire. The questionnaire was succinct (5-10 minutes to complete) to ensure a high completion.

A total of 1,614 responses have been received.

Strategic Research and Insight (SRI), is an independent research agency working on behalf of Fáilte Ireland consulted in the questionnaire design, scripted the online survey and co-authored the report with Fáilte Ireland.

Sector	Total Sample Size
Hotels	312
Guesthouses	46
B&B	215
Self-Catering	143
Hostels	22
Caravan & camping	44
Attractions	202
Activity Provider	146
Restaurants	87
Golf	21
Venue	28
Inbound operator	60
Event organiser	59
DMC	32
Aviation	6
Coach operator	22
Pub / bar	27
Retail	32
Tour guide	38
Other	72
Total	1,614

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Methodology



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An Roinn Gnó,
Fiontar agus Nuálaíochta
Department of Business,
Enterprise and Innovation

COVID-19 Business Supports Tracker

Most up to date data as of 21/05/2020

Name of Support	Provider	Objective of Support	Amount of Support	Inquiries Received	Applications Submitted	No. of Approvals Made	Value of Approvals Made
Covid-19 Working Capital Scheme	SBCI	Provides working capital loans to Covid-19-impacted businesses	From 25k up to €1.5m	884	2,591 eligibility applications (of which 2,305 deemed eligible, 13 ineligible, 273 in process) to 17 May	248 loans approved	€37,811,000
Credit Guarantee Scheme	SBCI	Provides guarantees to participating lenders on loans	Guarantees up to a maximum of €150m yearly	N/A	N/A	863 since inception in 2012	€151,659,224 since inception in 2012
Covid-19 loan	MFI	Provides loans to microenterprises that do not meet the conventional risk criteria of banks	Loans of up to €50k	2,574	562	329	€9,158,992
Sustaining Enterprise Fund €180m	Enterprise Ireland and IDA	The purpose of the fund is to sustain companies who have been impacted by a 15% or greater reduction in actual or projected turnover or profit, and/or have a significant increase in costs as a result of the Covid-19 outbreak.	Up to €800k repayable advance	Based on discussion with interested parties, Enterprise Ireland has sent 86 application forms to companies forms sent to companies	9 applications received	N/A	N/A

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Background & Methodology



Appendix 2: COVID 19 Business Supports Tracker

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An Roinn Gnó,
Fiontar agus Nuálaíochta
Department of Business,
Enterprise and Innovation

Name of Support	Provider	Objective of Support	Amount of Support	Inquiries Received	Applications Submitted	No. of Approvals Made	Value of Approvals Made
Sustaining Enterprise Fund – Small Enterprise	Enterprise Ireland	The purpose of the fund is to sustain eligible manufacturing and internationally traded services companies to provide support to companies: who have been impacted by a 15% or more reduction in actual or projected turnover or profit; and require access to liquidity to sustain business continuity.	Up to €50,000 per undertaking in the form of repayable advances.	NA	5 applications received	N/A	NA
Online Retail Scheme €2m	Enterprise Ireland	The objective of the Scheme is to support companies in the indigenous retail sector with a pre-existing online presence to respond to both the domestic and international consumer demand for a competitive online offer.	Up to €40k grant aid	N/A	Scheme opened 29 th April and will close for applications on the 27th of May. All applications will be reviewed post call close.		
Covid-19 Business Financial Planning Grant	Enterprise Ireland	Grant to provide a strategic intervention to clients to work with third party consultants to prepare a detailed financial plan with forecasts and assumptions	€5000 grant aid	650 inquiries received into the EI Business Response Unit regarding the Business Financial Planning Grant	409	328	€1.62m

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Methodology



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An Roinn Gnó,
Fiontar agus Nuálaíochta
Department of Business,
Enterprise and Innovation

Name of Support	Provider	Objective of Support	Amount of Support	Inquiries Received	Applications Submitted	No. of Approvals Made	Value of Approvals Made
LEAN Business Continuity Offer	Enterprise Ireland	The Lean Business Continuity Voucher will support enterprises to access up to €2,500 in training or advisory services support related to the continued operation of their business during the current pandemic.	€2,500 grant aid	Not possible to measure as inquiries are coming from various different sources.	200	155	€387,500
The Businesses Continuity Voucher*	LEOs	Provide support to firms who need assistance with business continuity and preparedness arising from the COVID-19 outbreak.		N/A	14,501	5,691	€12,929,988
Trading Online Voucher Scheme	LEOs	Offers financial assistance of up to €2,500 along with training and advice to help your business trade online. Businesses that have already received a Trading Online Voucher can now apply for a second voucher, where upgrades are required	Up to €2,500	N/A	3,000	1,248	€2,911,450
E-merge	Intertrade Ireland	Consultancy support & advice to help businesses develop online sales & ecommerce solutions.	€2500/€2800	N/A	210	94	€263,000

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An Roinn Gnó,
Fiontar agus Nuálaíochta
Department of Business,
Enterprise and Innovation

Name of Support	Provider	Objective of Support	Amount of Support	Inquiries Received	Applications Submitted	No. of Approvals Made	Value of Approvals Made
Emergency Business Solutions	Intertrade Ireland	Fully funded consultancy support & advice to address key business challenges in areas such as emergency cashflow, loan applications and HR/People	€2000/€2250	N/A	163	113	€254,250

* The Businesses Continuity Voucher Scheme has now closed

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Methodology