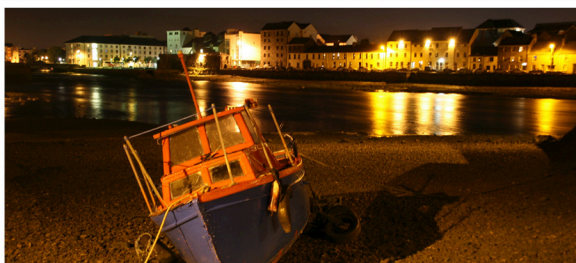
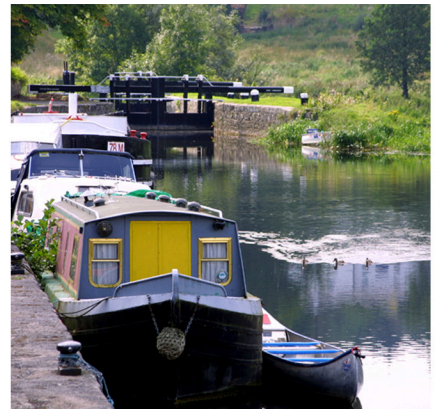
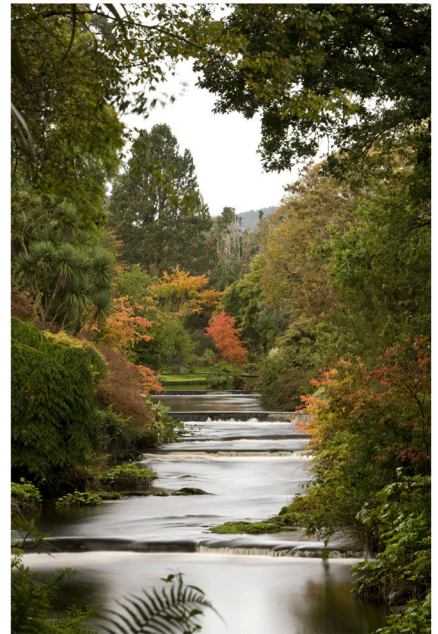


Tourism Barometer



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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 460 responses to an online survey with tourism businesses in April 2016 and conducted 200 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)

	2008	2009	2010	2011	2012	2013	2014	2015	2016
Up	14	15	28	39	41	46	62	61	63
Same	18	11	25	31	25	26	23	24	25
Down	68	74	47	30	35	27	15	15	12

Base: Accommodation Providers (weighted to available rooms)

- 1.1 The outlook for Ireland's tourism is bright this year. A good start to 2016 has helped set the tone for a positive year and a sentiment of further growth in the industry.

Very positive results in the paid serviced accommodation sector

- 1.2 The majority (73%) of weighted PSA operators have seen an increase in visitors to date in 2016, and a further one in five (20%) have received the same level. Only a small minority (7%) report being down.
- 1.3 Hotels have had a particularly good start to the year, with most (78%) experiencing increased visitor levels. Close to half (46%) of hotels say that the 'improved domestic economy' is a positive factor affecting their business this year – the highest proportion of any industry sector.
- 1.4 Guesthouses have also started the year strongly, and this is mainly due to the performance of the overseas market. Nearly two in three (63%) guesthouses report being up on overseas visitors to date this year.
- 1.5 The performance of the B&B sector to date this year is steadier, but nevertheless a third (32%) of B&Bs are up on last year, which is higher than the proportion (20%) reporting to be down.

Investment reaps reward

- 1.6 It is encouraging that serviced operators are making investments in their business and seeing the rewards. This is particularly the case among hotels, whereby two in five (40%) cite 'own investment in the business' as a positive factor this year.

Question marks over perceived value for money after self catering gets off to a mixed start to the year

- 1.7 The self catering sector has got off to a mixed start to 2016, with about a quarter (26%) of operators up on visitors, but close to a third (31%) are down. One in three (32%) self catering operators have said that perception of poor value for money in Ireland is an issue of concern affecting their business this year – a higher proportion than in any other industry sector.
- 1.8 The remainder of 2016 is expected to be more positive though, as more than a third (36%) anticipate more visitors during the remainder of the year, and about half (51%) are expecting the same level of visitors. Two thirds (67%) of operators state 'repeat visitors' as a positive factor this year – the highest proportion of any sector.

Buoyant overseas business for hostels

- 1.9 Hostels are enjoying a very good 2016 so far, with two thirds (67%) of respondents reporting an increase in visitors to date this year. The overseas market is strong, with the majority (63%) of hostels reporting growth from these markets.

Soggy start for campsites

- 1.10 Potential visitors to caravan & campsites may have been put off by indifferent weather in the early season. Many (43%) caravan & campsites report being down on visitors compared to last year, and most (63%) operators cite the weather as a key issue of concern.
- 1.11 However, the slow start to the year may quickly be forgotten as around half (47%) of operators expect to be up on visitors for the remainder of the year.

Own marketing gets results for attractions

- 1.12 Attractions are enjoying an excellent start to 2016. About half (52%) report increased traffic and many others (35%) the same level as last year.
- 1.13 Own marketing is perceived to be a significant contributor to growth, with over half (54%) of attractions reporting this to be a positive factor affecting their business.

More euros to spend on eating out

- 1.14 Restaurants have been busy so far this year, with half (49%) receiving more tourist customers compared to the same period last year and two in five (41%) receiving the same level.
- 1.15 The sector appears to be benefiting greatly from improved exchange rates in favour of overseas visitors from outside the Eurozone. Over two in five (43%) cite 'exchange rates' as a positive factor this year – the highest proportion of any industry sector.

Golf clubs expect a good round

- 1.16 Golf clubs have teed off well this year, with two in five (39%) welcoming more tourist customers. Expectations for the remainder of the year are very high, with most (76%) expecting to be up.

Another year of growth expected

- 1.17 The industry as a whole is very optimistic about 2016. The Wild Atlantic Way initiative in particular continues to attract praise from operators along the Atlantic coast.

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.

Early indications are good

- 2.1 The overall sentiment in 2016 is that of continuing prosperity, with visitor numbers either higher or remaining similar to the same time last year overall.

“Overall positive”

“No major difference between 2015 and 2016, things continue to be good”

“We are in the land of record numbers, so it’s just a matter of making sure that we can continue to keep going. There’s nothing not doing well”

Overseas markets perform well around early Easter

- 2.2 An early Easter coupled with St Patrick’s Day celebrations made for a busy period – particularly from the overseas markets. Mainland Europe is performing well; sometimes with double digit growth.

- 2.3 The North American market continues to be strong, with spending focussed on package holidays.

“The sense is that the packages from North America are selling very well and a lot of the volume of growth is driven out of there”

“North America continues to thrive”

“Mainland Europe - French, German, Spanish, Italian are showing double digit growth year-on-year-on-year”

- 2.4 The domestic market was not as strong due to the comparatively colder weather at this time of year.

“The domestic market took the biggest hit because people didn’t come out because it was too cold and wintery”

- 2.5 Although Easter gave an early boost overall, this appears to have evened out over the rest of the first few months.

“Only that it’s down, because Easter was just too early, we did some business, it wasn’t too bad, but it does mess up things like early bookings, so you have a busy period and then it drops off”

Ireland is a safe destination

- 2.6 The perception of Ireland as a relatively safe destination in comparison to those with recent or potential terrorist attacks is cited as a possible reason for continued growth.

“The concerns over security around Europe and North Africa are probably still benefiting Ireland; so people choose to come to a relatively safe destination”

On-going Dublin capacity Issues

- 2.7 The continuing lack of accommodation in Dublin is believed to be becoming a more concerning issue as the growth in American package holidays take up more of the capital's bed spaces.

“There is feedback that the lack of accommodation in Dublin is an issue and the fact the American market is growing so well, it might be that the Americans are booking earlier and coming longer, so maybe they are booking it up”

“There's a shortage of hotel rooms and particularly an issue for tour operators”

Concerns over 'Brexit'

- 2.8 The possibility of Britain's exit from the European Union is already having an effect on the strength of the sterling, according to some industry leaders. There is a fear that should Britain vote 'out', Ireland's tourism business from Britain will be negatively affected.

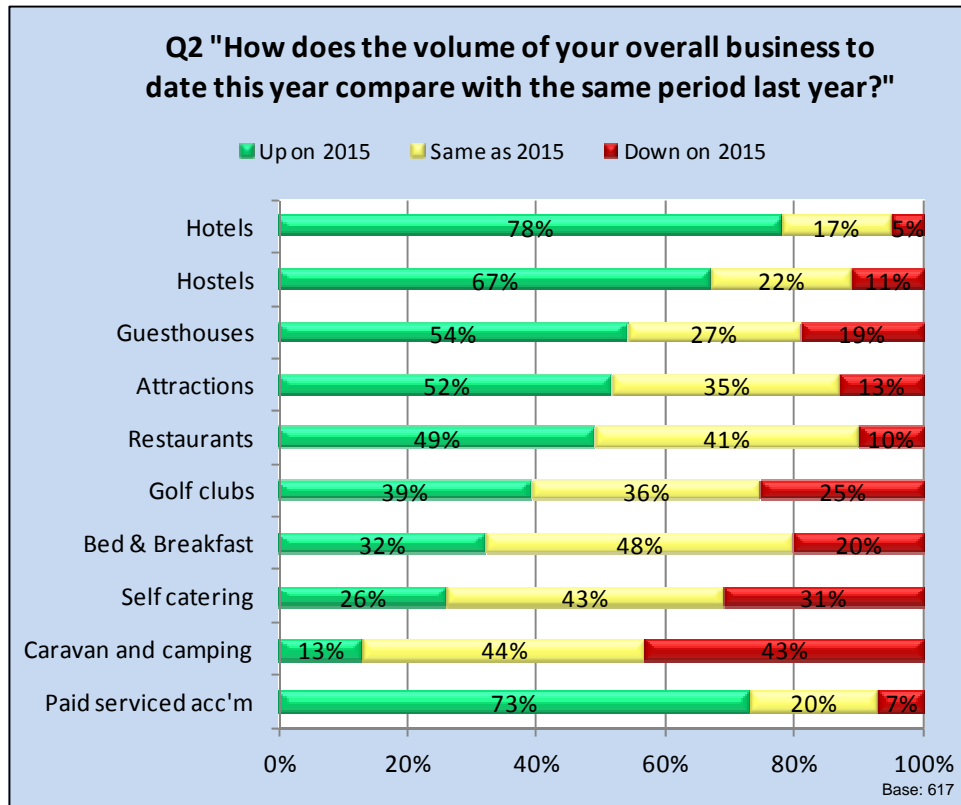
“Maybe it's a touch of the old 'Brexit syndrome'. Obviously there has also been a slight change in the exchange rate with the Euro strengthening and that 10p might make a difference”

“Brexit has led to sterling weakening. Compared to last year everything would have gone up and people will be finding Ireland a bit more expensive than last year”

3. Overall Visitor Volumes in 2016 and Expectations

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

Overall visitor volumes in 2016



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.

Promising start to the year in many sectors

- 3.1 The performance of the tourism industry continues its upward trend in 2016. Most (73%) paid serviced accommodation businesses are up on 2015 year to date as the domestic and overseas markets are buoyant.

"The market is simply stronger"
Hotel

Domestic success for hotels in 2016

- 3.2 Most (78%) hotels report an upturn in business to date this year. The domestic market is performing very well for hotels, as about two in three (64%) operators report increased domestic visitors to date. Close to half (46%) of hotels say that the ‘improved domestic economy’ is a positive factor affecting their business this year – the highest proportion of any industry sector.

“Overall improvement in the Irish economy has increased people’s purchasing power”
Hotel

Guesthouses benefiting from overseas visitors

- 3.3 Just over half (54%) of guesthouses recorded higher visitor volumes to date this year. The overseas market is the driving force behind this – close to two in three (63%) guesthouses have welcomed more overseas guests.

“Cobh is such a beautiful harbour town which brings lots of Irish Americans and Australians”
Guesthouse

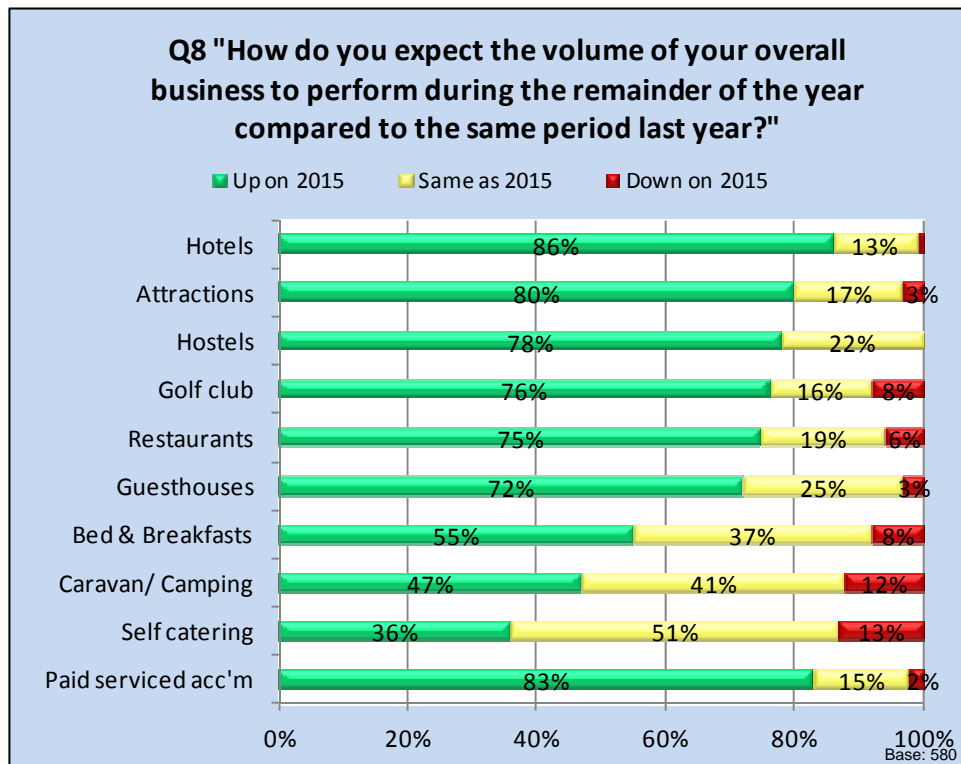
Attractions making themselves known

- 3.4 Attractions are enjoying an excellent start to 2016. About half (52%) report higher attendances and many others (35%) have seen the same level.
- 3.5 Own marketing is perceived to be a significant driver, with over half (54%) of attractions reporting this to be a positive factor affecting their business.

Campsites bogged down

- 3.6 Caravan and campsites have had the most difficult start to the year, with many (43%) operators down on visitors. This is mostly thought to be due to the weather – close to two thirds (63%) of caravan and campsites cite this as an issue of concern this year.

Expectations for 2015



Very positive outlook in 2016

- 3.7 If expectations are fulfilled, 2016 will be a bumper year for the tourism industry. Optimism spans across all industry sectors and applies to all markets.

"There's a positive economic outlook"

Hotel

"Good rating on Trip Advisor is very positive for my business"

B&B

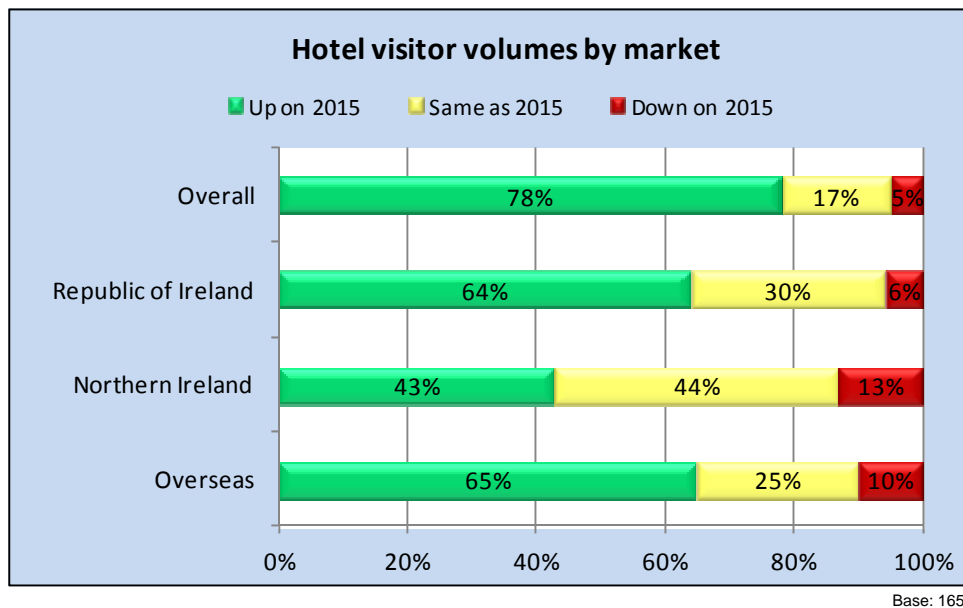
"There's a positive view of Ireland ... the 9% VAT rate remaining and a competitive view of Ireland versus 5 or 6 years ago"

B&B

4. Hotels

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

Hotel visitor volumes year to date



Very promising start to 2016 for hotels

4.1 Most (78%) hotels have seen an increase in guests to date this year. The overseas market is performing very well, as is the domestic market. Nearly half (46%) of hotels say that the 'improved domestic economy' is a positive factor affecting their business this year – the highest proportion of any industry sector.

Investment in the business is returning

4.2 During the financial crisis, many hoteliers could not afford to invest in their product and were surviving the difficult years as best they could.

4.3 An encouraging result in this research wave is that two in five (40%) operators cite 'own investment in the business' as a positive factor this year. This is the highest proportion of any sector.

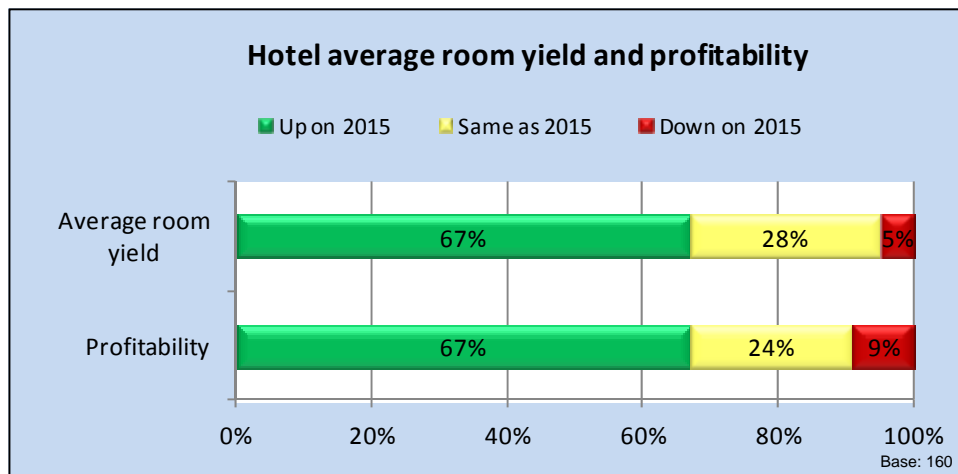
"We refurbished our bedrooms last year"

Hotel

"We've enhanced facilities in the hotel compared to last year"

Hotel

Hotel average room yield and profitability



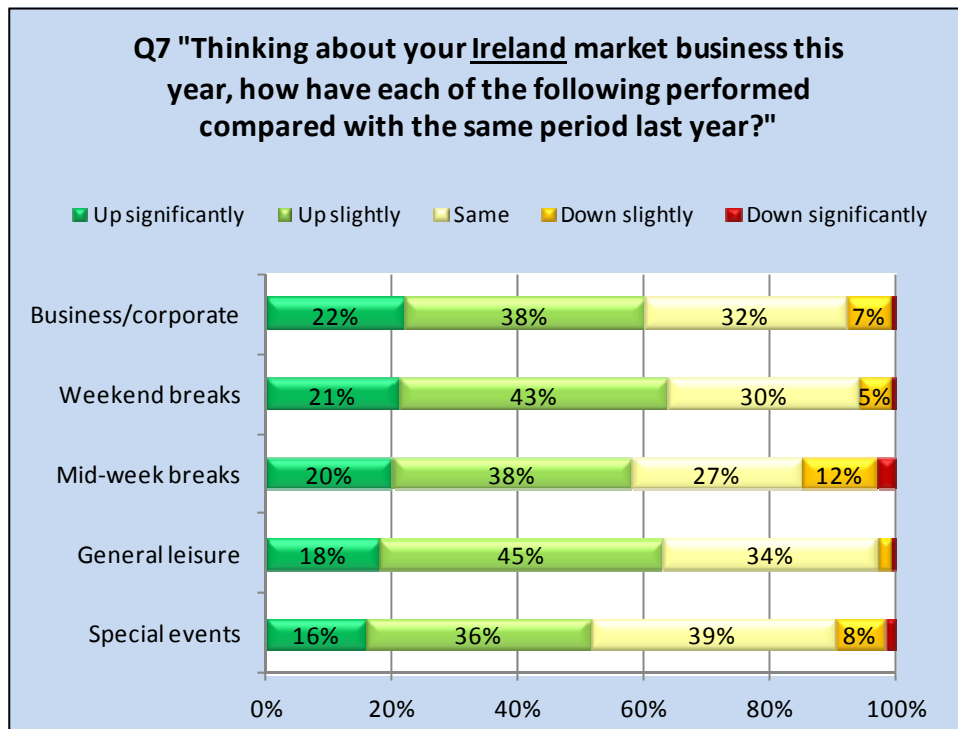
More profitable business in 2016

- 4.4 Hotels' average room yield and profitability continue to rise year on year. Two thirds (67%) are experiencing increased profitability to date this year, although this is a little behind the proportion (78%) welcoming increased visitor numbers, suggesting perhaps that not all hotels are managing to translate increased visitors into more profit.

"Overheads have increased, while in order to stay competitive rates can't be increased to reflect this"

Hotel

Hotel visitor types (Ireland market)



Base: 158

Return of the corporate market

4.5 During the financial crisis, the business/corporate market was one of the areas hit most significantly. The recovery appears to be strong, with close to a quarter (22%) of hotels reporting to be 'up significantly' in this market, and about two in five (38%) 'up slightly'. Only a small minority (8%) are down.

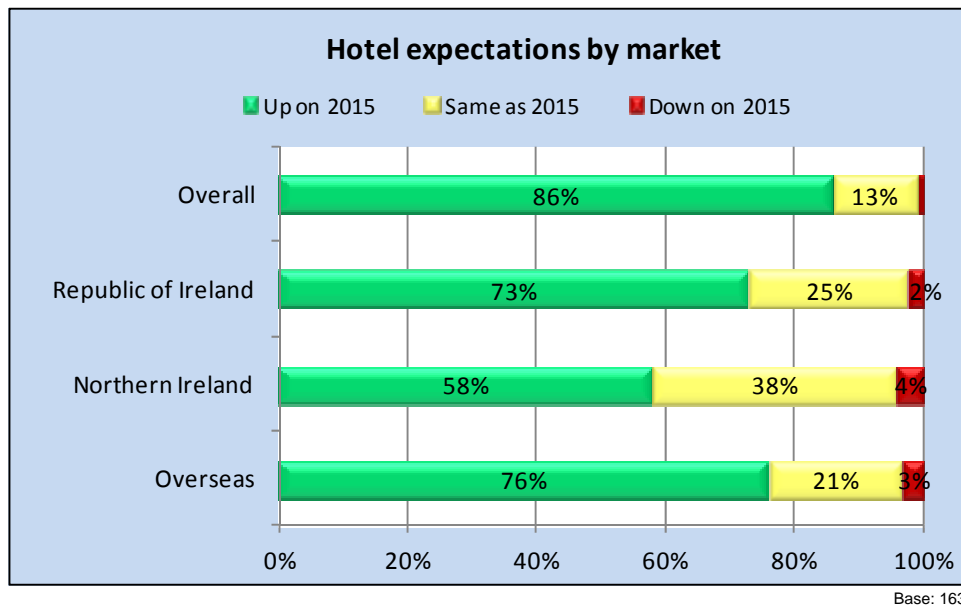
All other areas of domestic tourism are performing well

4.6 The domestic market is strong for hotels to date this year, and the increased visitor levels are seen across all areas. Very small proportions of hotels report being down on any area.

"We've had an increase in all aspects of tourism"

Hotel

Hotel expectations



Looking forward to the rest of 2016

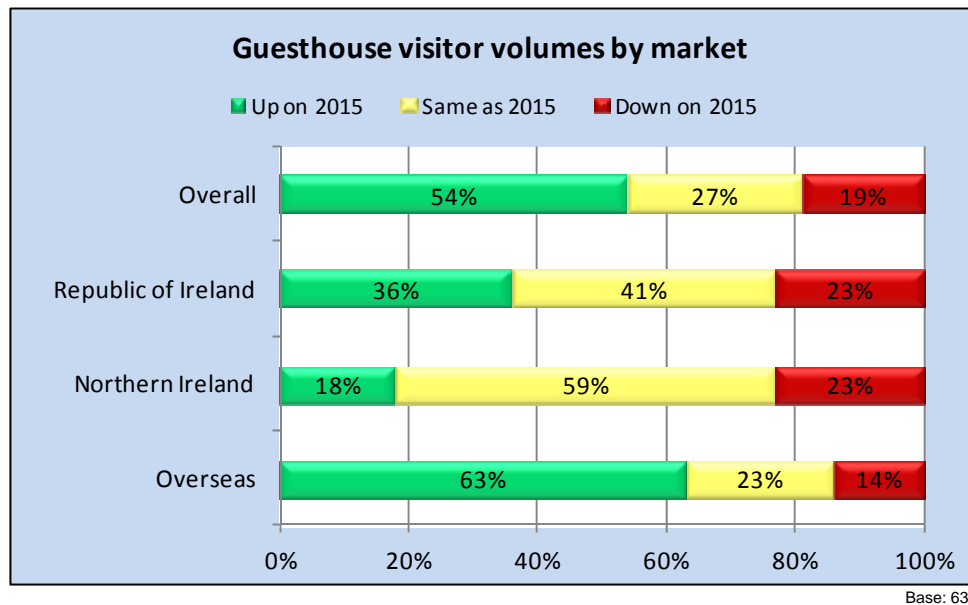
- 4.7 Following an excellent start to the year, hotels are looking forward to rest of the year with optimism. The vast majority (86%) expect growth compared to last year.

Favourable exchange rates expected to boost visits from outside the Eurozone

- 4.8 The overseas market is expected to perform well for the rest of the year, and in particular the British and American markets are expected to be strong. Close to two in five (37%) hotels cite 'exchange rates' as a positive factor affecting their business this year.
- 4.9 Northern Ireland is a market which has not performed well for some time, but this year many (58%) hotels expect to see an increase in visitors.

5. Guesthouses

Guesthouse visitor volumes year to date



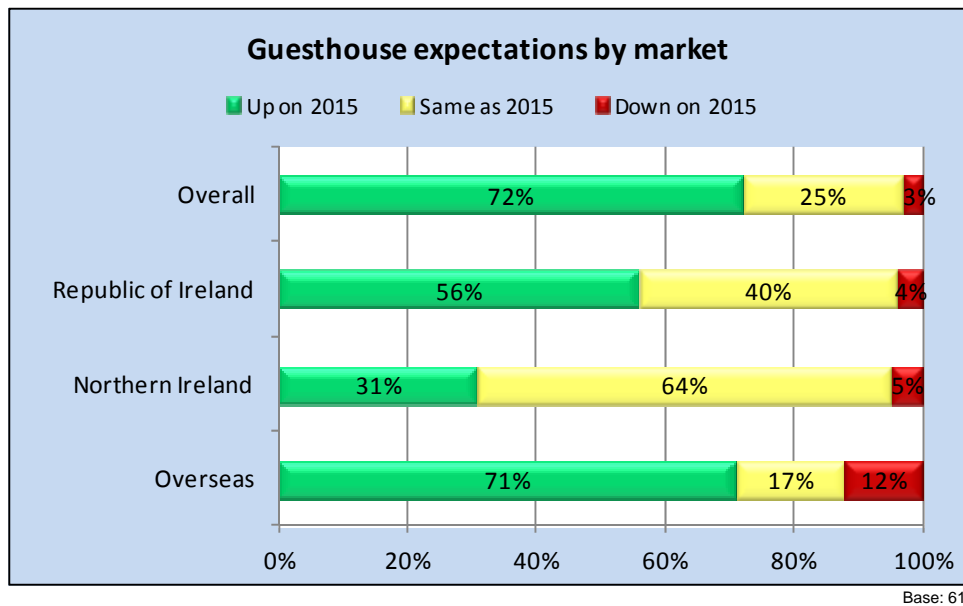
Guesthouses welcoming overseas visitors in abundance

- 5.1 Guesthouses have started the year strongly, and this is mainly to do with the performance of the overseas market. Nearly two in three (63%) guesthouses report an increase in overseas visitors to date this year.
- 5.2 The growth is seen across all key overseas markets including France and Germany, so the strong performance is not just down to exchange rates.

“We have actively engaged social media marketing, pay per click campaigns”
Guesthouse

“Our online marketing has been successful”
Guesthouse

Guesthouse expectations



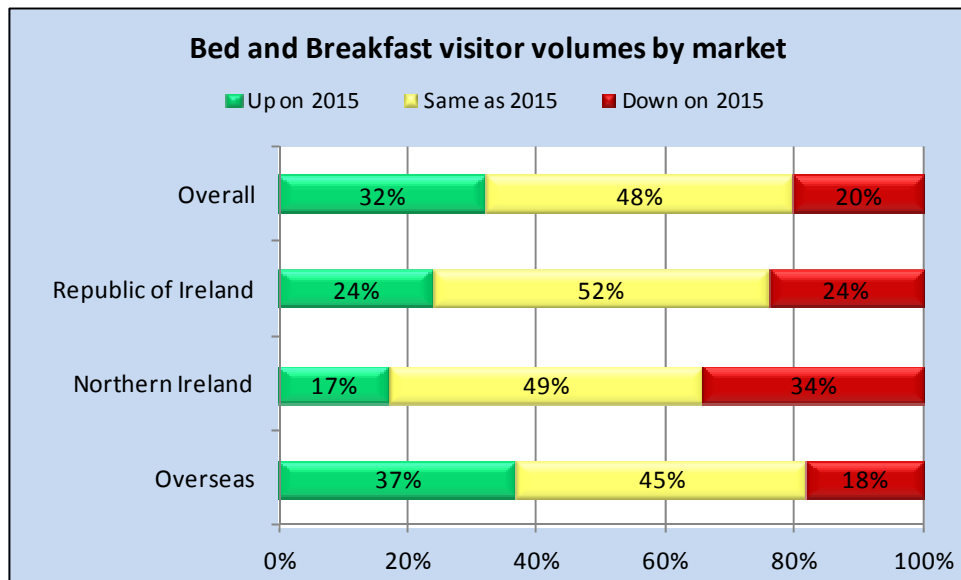
High expectations for 2016

- 5.3 2016 is expected to pick up even more for guesthouses. Most (72%) expect a busier year than 2015, and only a small minority (3%) expect to be quieter.
- 5.4 Following an influx of overseas visitors to date this year, expectations are for this trend to continue. Expectations are high across all major overseas markets (Britain, North America, France and Germany).

“There is more awareness of us thanks to agencies”
Guesthouse

6. B&Bs

B&B visitor volumes year to date



Steady start for B&Bs

- 6.1 The performance of the B&B sector to date this year is steadier than the other serviced accommodation sectors, but nevertheless there is much to be positive about. A third (32%) of B&Bs are up on last year, which is higher than the proportion (20%) reporting to be down.
- 6.2 The sector is being supported well by the overseas market. Over a third (37%) of B&Bs hosted more overseas visitors to date this year, and many more (45%) have received the same level. All major overseas markets (Britain, North America, France and Germany) are performing well.

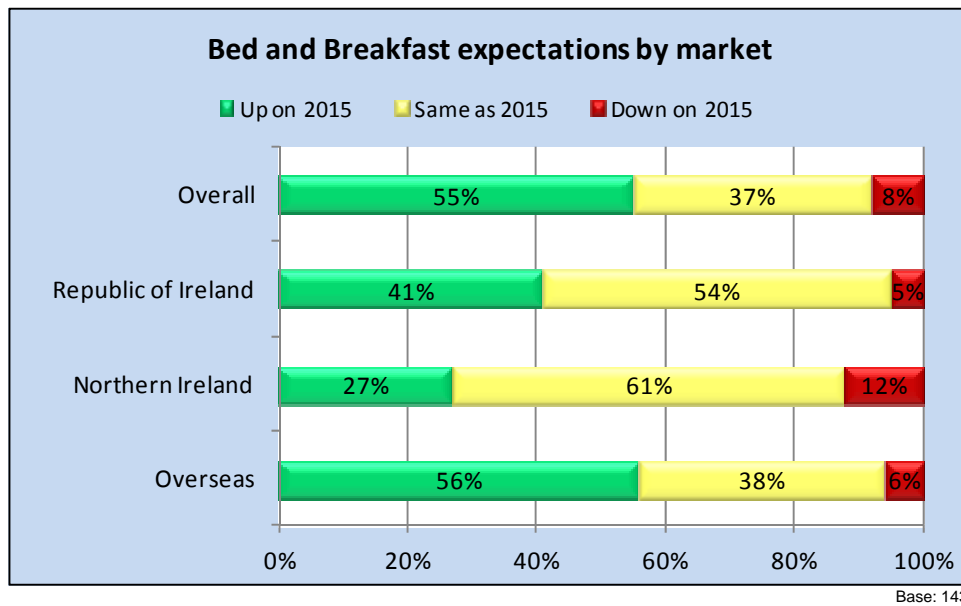
“Visitors from Northern Ireland and Britain are getting good value for money with the exchange rate, and also the Americans are enjoying good exchange rates”

B&B

“We invested in renovations of our B&B in 2014/15 – happier customers”

B&B

B&B expectations



Optimistic outlook

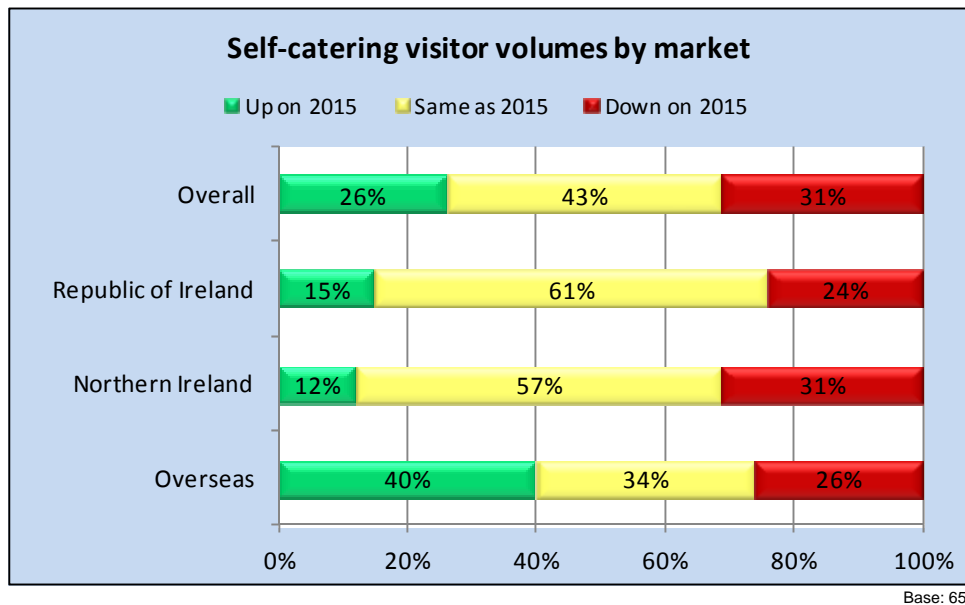
- 6.3 The outlook for the rest of 2016 in the B&B sector is encouraging. Over half (55%) expect to be busier than last year and only a minority (8%) expect fewer guests.

“Lots of bookings from Italian, Spanish and Russian visitors”
B&B

“My area has become a wedding destination, which makes our weekends busy with the overflow of guests attending the wedding”
B&B

7. Self-catering

Self-catering visitor volumes year to date



Mixed start for self catering sector

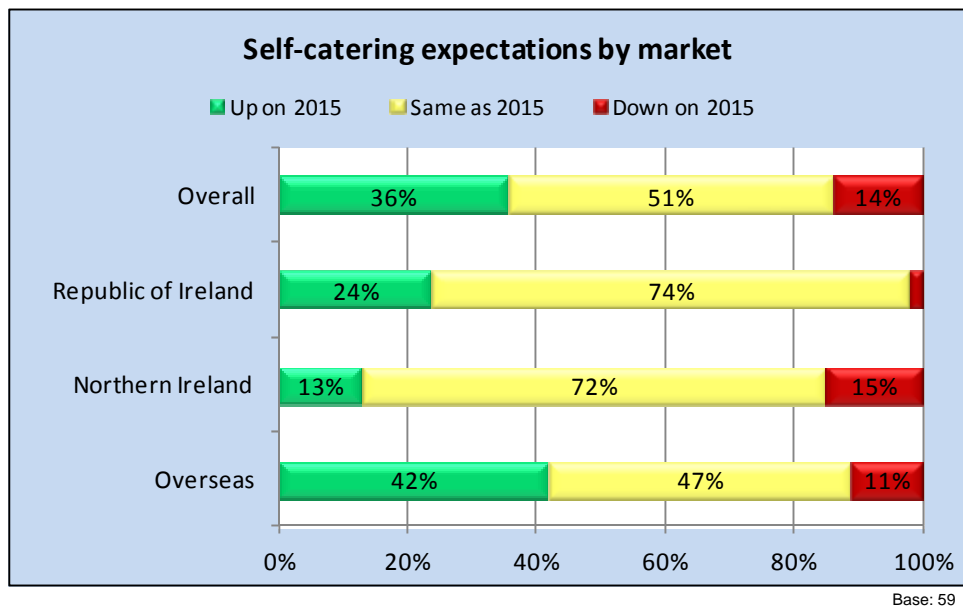
7.1 Self catering operators have had varied experiences in the first months of 2016. While a quarter (26%) say they have seen more visitors than last year, three in ten (31%) have seen a drop in numbers.

7.2 A third (32%) say that perception of poor value for money in Ireland is a concern for them this year, which is a higher proportion than other sectors. This may have led to Irish people holidaying outside the country (24% report a decrease in this market).

“I think Irish people in general feel like they have a bit more money so may be going abroad for the first time in a while which had led to our drop in bookings”
Self catering

7.3 The overseas markets, however, have been performing better than others, with two in five (40%) operators having seen an increase so far.

Self-catering expectations

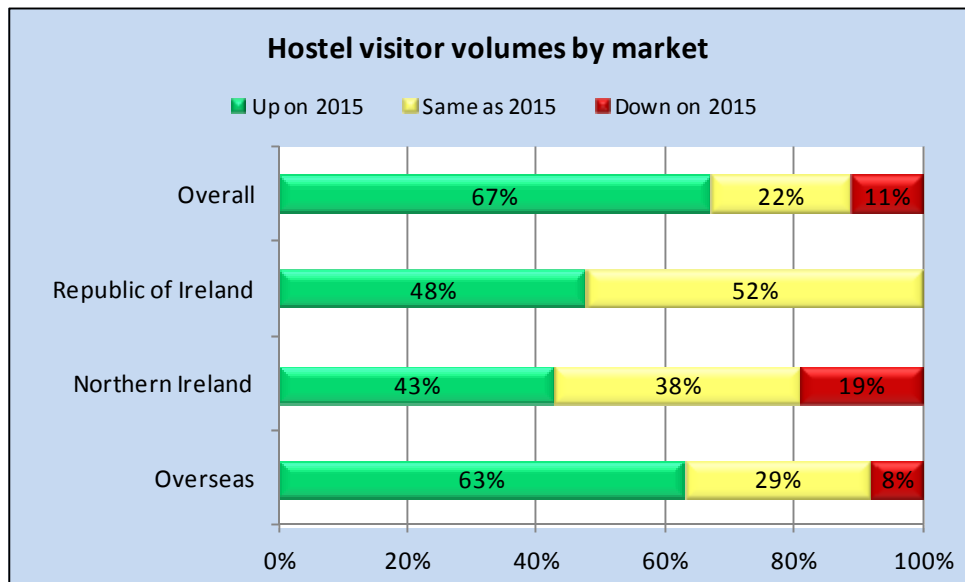


Rest of the year to improve

- 7.4 The remainder of 2016 looks likely to improve, overall, with 36% saying they expect to see more visitors.
- 7.5 Mirroring its performance in the first quarter, it is the overseas markets that self catering operators will be looking to for growth, with 42% predicting higher numbers.
- 7.6 For the self catering sector, repeat visitors are invaluable, with two thirds (67%) citing this as a positive factor – higher than any other sector.

8. Hostels

Hostel visitor volumes year to date



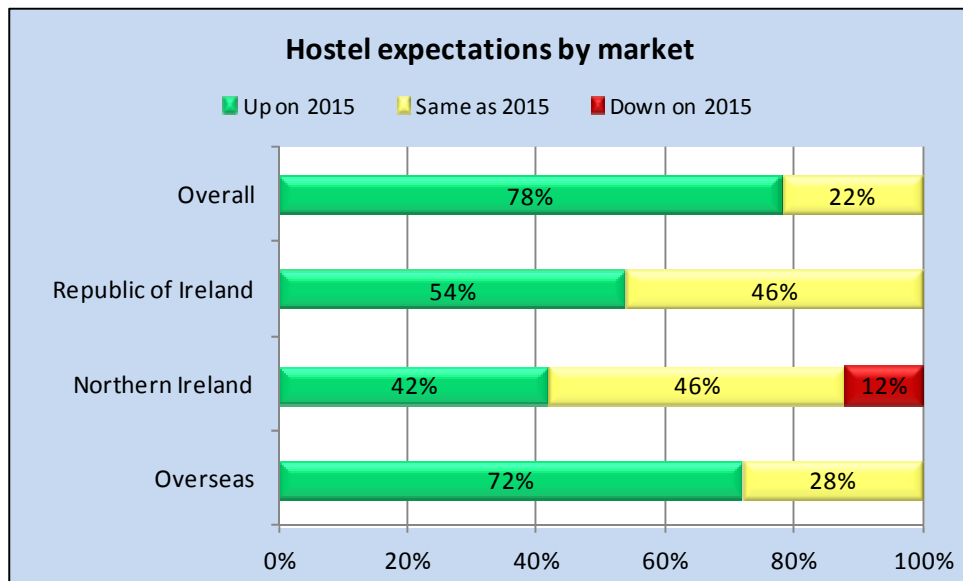
Europeans hotting up for hostels

- 8.1 Buoyant overseas markets have helped hostels enjoy a lift in the number of visitors they book in. Nearly two in three (63%) have checked in more visitors from overseas, with the French and German markets performing particularly well (67% report an increase).
- 8.2 Nearly half (48%) have seen a rise in the domestic market so far this year.

“There are a lot of Irish people holidaying in Ireland for long weekends or with groups of family and friends”

Hostel

Hostel expectations



Overseas visitors to step up further

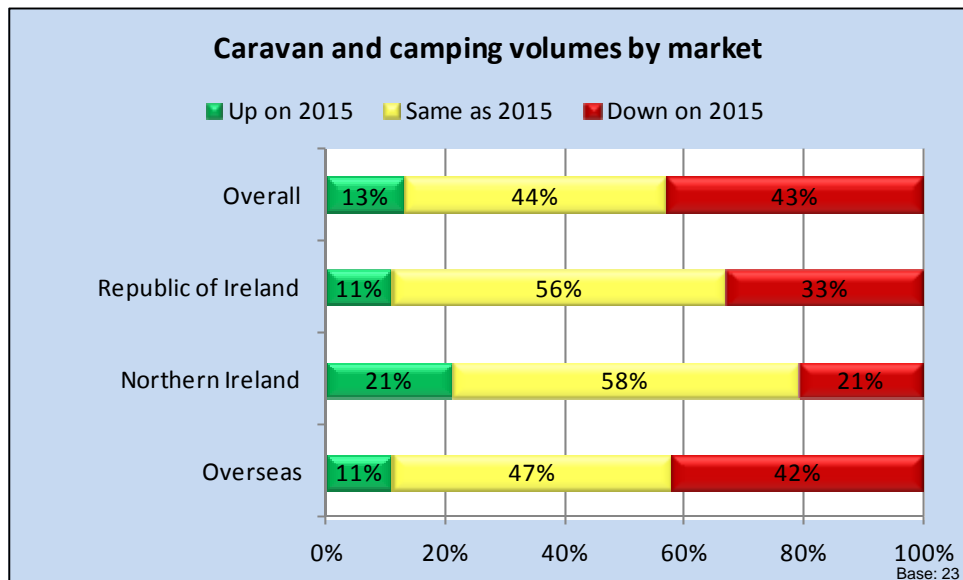
- 8.3 Optimism is high among hostel operators, with 78% saying they expect to welcome more visitors over the remainder of the year. Following strong overseas performances in the first months of 2016, 72% expect to book beds out to more overseas visitors, compared to last year.
- 8.4 Again, it's the French and German markets that are expected to increase for big proportions of the sector (72% expect an increase from France and 76% from Germany).

Local events lifting the sector

- 8.5 Around two in five (42%) say that local festivals and events are positively affecting their business this year – a higher proportion than other sectors.

9. Caravan and Camping

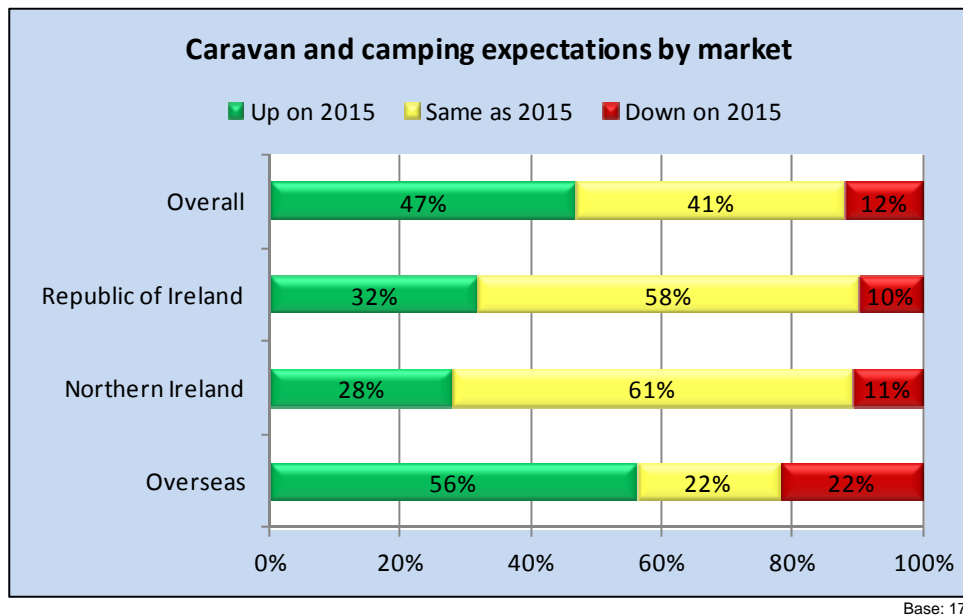
Caravan and camping visitor volumes year to date



Poor start to the year for those who have been open

- 9.1 The cold and unpredictable start to 2016 is reflected by the slow start for the caravan and camping sector.
- 9.2 Many (43%) caravan & campsites report being down on visitors compared to last year, and most (63%) operators cite the weather as a key issue of concern. However, many caravan and camping sites do not open until May for this reason.

Caravan and camping expectations



Lift expected from overseas

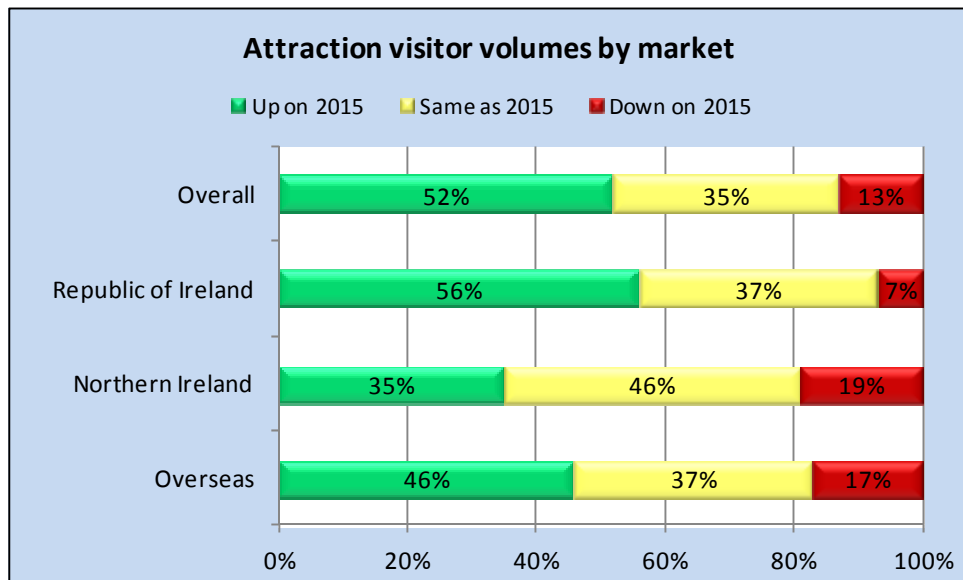
9.3 After a poor start to the year, the sector looks to the remainder of 2016 with more positivity. Overall, nearly half (47%) expect to welcome more visitors onto their sites, and 56% expect to see more pitches taken up by people visiting from overseas.

Fuelled by lower energy prices

9.4 Around two in five (42%) caravan and camping coordinators say that lower fuel prices are a positive. Paying less money for fuel not only benefits the sites directly, but also potential visitors towing heavy caravans.

10. Attractions

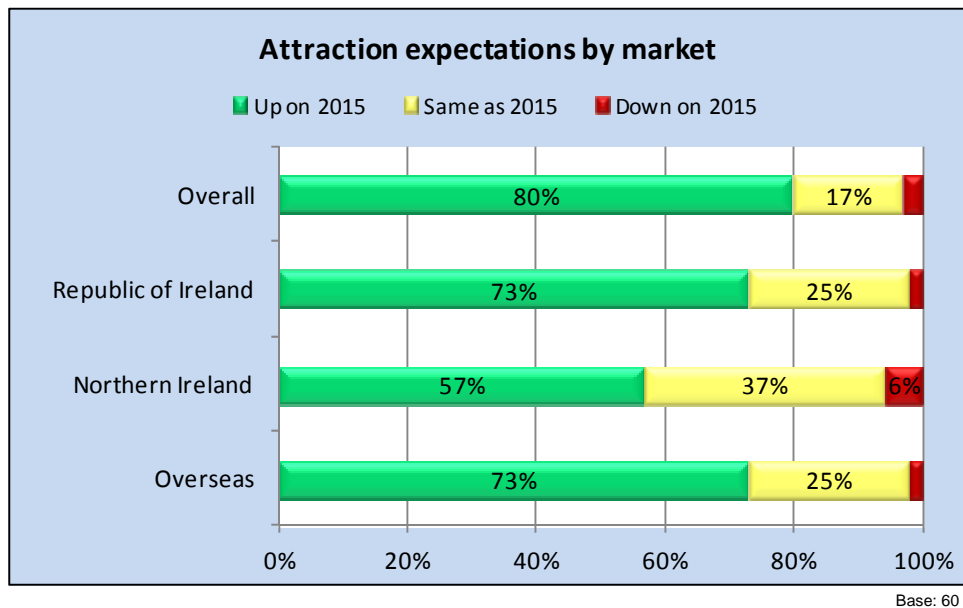
Attraction visitor volume years to date



Marketing helps lift attractions

- 10.1 A high proportion of attractions say that marketing is having a positive effect on their business this year.
- 10.2 Backed by 54% saying their own marketing is positive and 39% giving praise to marketing by local or national tourist boards, 2016 has got off to a great start for attractions. About half (52%) have had a stronger start to the year compared to 2015.

Attraction expectations

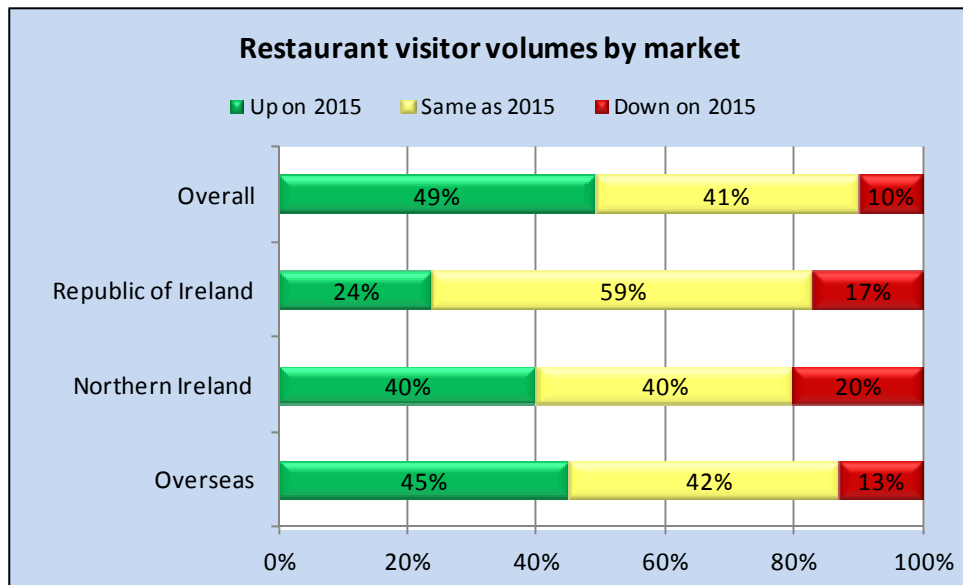


Tickets expected to fly out

- 10.3 Bolstered by an excellent start to the year, a strong proportion (80%) of attractions are preparing to welcome more visitors through their doors and gates during the remainder of the year.
- 10.4 Around three quarters (73%) expect to see an increase from overseas markets and the same proportion predict a rise in the domestic market, with 38% citing Irish people holidaying in Ireland as a positive factor this year.

11. Restaurants

Restaurant visitor volumes year to date



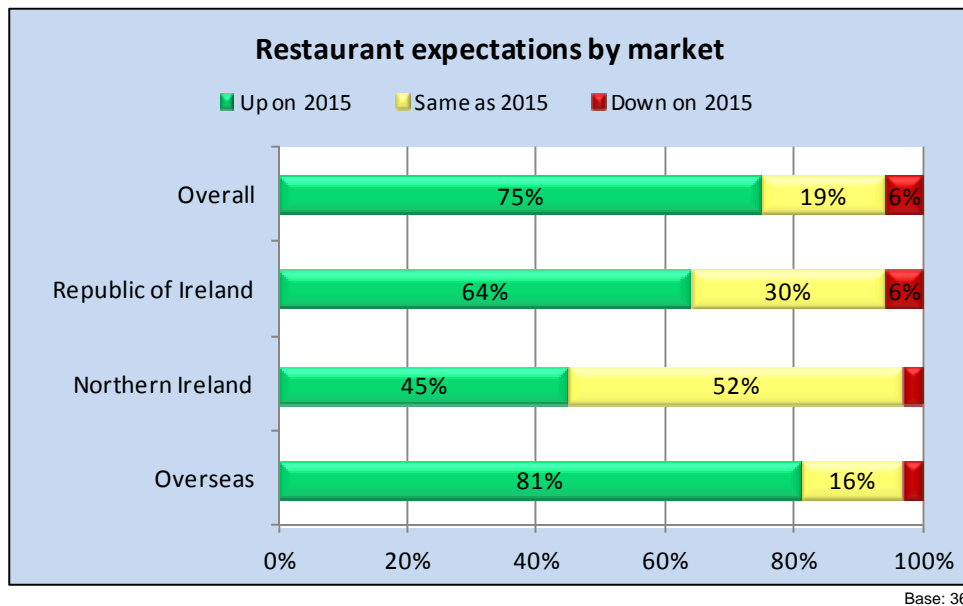
Restaurants invited to take part in the Barometer are in areas of high tourism footfall, and respondents have been asked to answer questions in the context of their tourism, i.e. non-local, business

Eating out is on the rise

- 11.1 The year has started very well for restaurants, with half (49%) having seen more tables taken up by tourists compared to 2015.
- 11.2 In particular, the North American market has shown progress. More than half (53%) say they have seen a higher number of visitors from the North America grace their tables at the start of the year.
- 11.3 An increase from overseas has been welcomed by 45% overall. This good proportion may have been helped by exchange rates, with 43% seeing this is a positive factor.

*“Parity with the dollar”
Restaurant*

Restaurant expectations

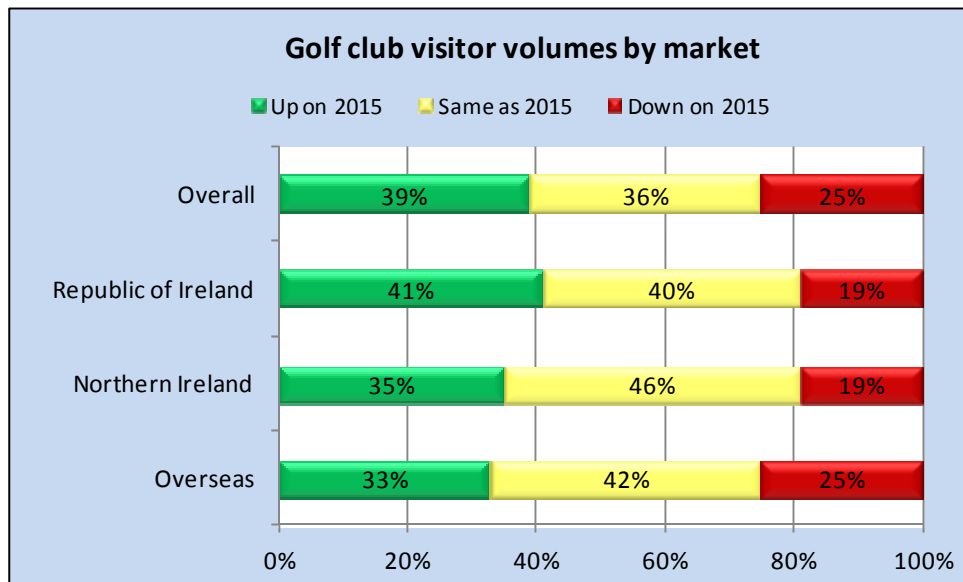


Tasty increases expected

- 11.4 Overseas markets are set for a real taste of Ireland this year, with a high proportion (81%) of restaurants expecting more foreign visitors compared to 2015.
- 11.5 The exchange rate with countries outside of the Eurozone is one of the leading factors for this predicted rise. A quarter (76%) expect more business from North America and 57% think they will be serving more British visitors during 2016.
- 11.6 Overall, three quarters (75%) expect more tourist customers this year – including two in three (64%) who expect more domestic tourists.

12. Golf Clubs

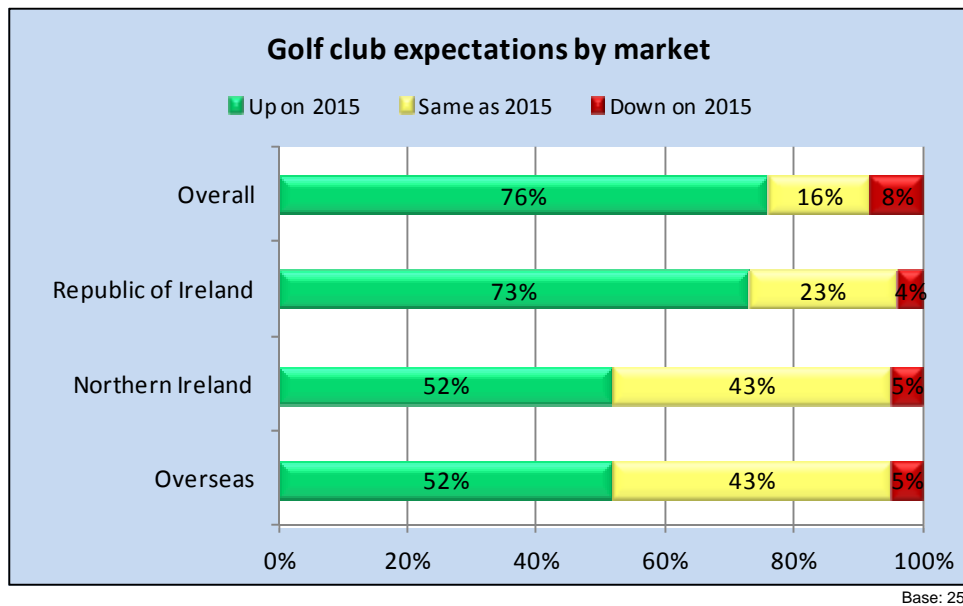
Golf club visitor volumes year to date



Fair(way) start to the year

- 12.1 Golf clubs have seen a decent start to 2016, with two in five (39%) seeing higher numbers of tourist visitors onto their greens.
- 12.2 Domestic visitors are doing well so far this year (41% of operators are up), as are visitors from North America (39%).

Golf club expectations



Rest of 2016 to drive forward

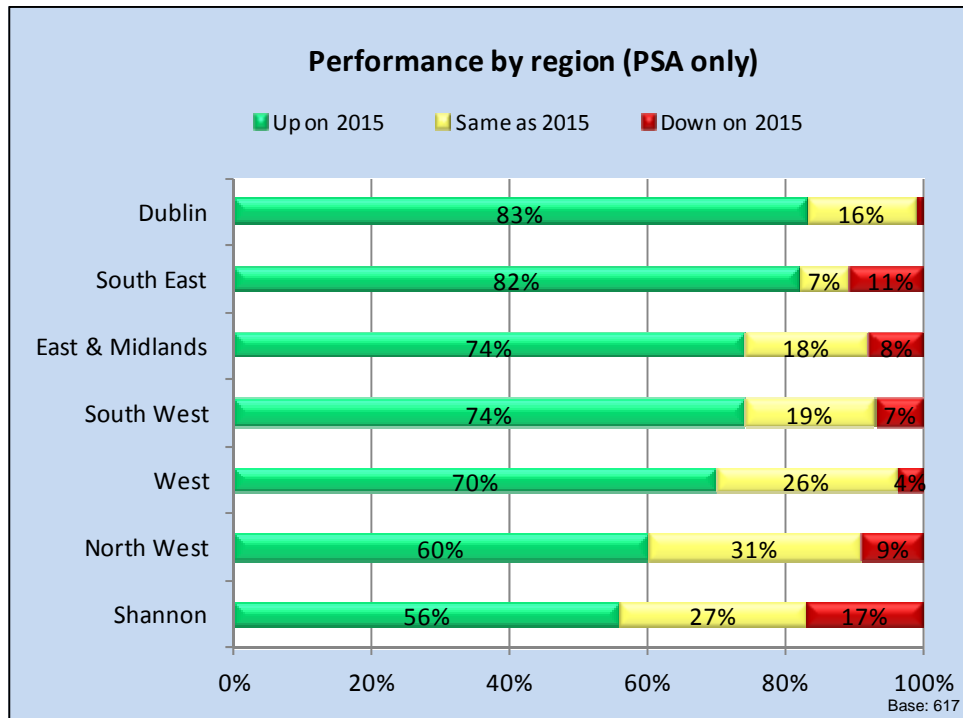
12.3 The remainder of the year is expected to be much stronger, with three quarters (76%) of responding golf clubs predicting more visitors teeing off on their courses. In particular, the domestic market should deliver an increase for 73% of clubs.

Keeping an eye on the skies

12.4 While this weather-dependent sector hopes for a warm, dry summer, not all are as optimistic about the forecast for 2016. More than half (54%) are concerned about the knock-on effect of bad weather this year.

13. Performance by Region

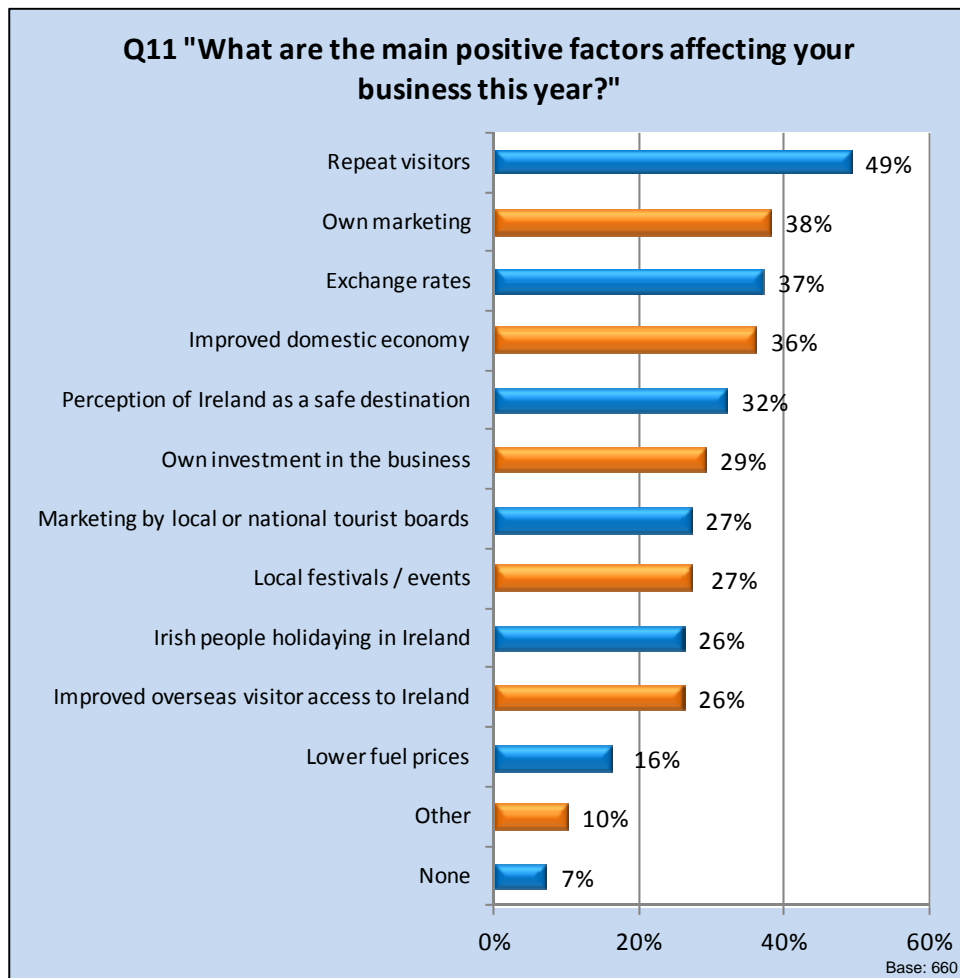
Here we discuss the performance by region for the PSA sector



All regions of Ireland are performing well

- 13.1 The promising start to 2016 is reflected across all regions of Ireland in the PSA sector. In particular, Dublin is performing very well, with most (83%) PSA businesses increasing their visitor numbers to date and nearly all of the remainder (16%) achieving the same level. In Dublin city centre, more than half (57%) of PSA businesses say that 'local festivals / events' are a positive factor this year.
- 13.2 South East Ireland is also performing well. Nearly two in three (63%) PSA businesses in this region say cite 'repeat visitors' as a positive factor this year. Also, many (43%) PSA businesses in the South East are seeing rewards from investing in their own business – the highest of any region.

14. Positive Factors in 2016



Repeat visitors remain top positive

- 14.1 Half (49%) of all respondents say that their business benefits from visitors coming back for more. Self catering operators are more likely to report repeat visitors as a benefit (67%) compared to other sectors (47% average).

"Repeat business has been a huge factor in Irish business growth"
Self catering

Expected boost from 100 year anniversary of the 1916 Easter Rising

- 14.2 Through the open comments, some operators say that they expect to see a positive impact through commemorations marking the centenary of the Easter Rising.

"1916 festival has bought a more family orientated vibe to the city centre"
Restaurant

“The centenary of 1916 should a positive factor on all tourist attractions”
Attraction

“Increased attention due to 1916 celebrations”
Self catering

Benefits of investing in their business

- 14.3 Many operators are seeing the benefits of improved business from investment. Whether it's through refurbishment, an increase in capacity, more staff or improved facilities – some are already feeling a positive effect on their business, and expect to do so during the remainder of the year.

“More rooms than last year”
Hotel

“More staff”
Golf

“Refurbished bedrooms”
Hotel

Improved tourism sector

- 14.4 Through open comments, there seems to be a belief that the tourism sector as a whole is improving – and some operators are feeling the benefits.

“The market is simply stronger”
Hotel

“Sentiment within the country that we may have turned the corner”
Restaurant

- 14.5 This is sometimes through other businesses opening in the area and attracting more visitors, a sense that visitors are spending more money or that bookings are being made further ahead than previous years.

“Bookings for July are much better and came in earlier”
Self catering

“Local hotel reopening and holding functions”
Hostel

“New glamping site opening locally”
Attraction

High praise continues for the Wild Atlantic Way

- 14.6 For many operators – especially along the West coast of Ireland - the success of the Wild Atlantic Way continues to have a positive effect of their business. The initiative has cemented itself as a popular hook for tourists, and marketing of the route is wide-reaching.

“Wild Atlantic Way is definitely becoming more recognized as a brand and destination among international guests more so than last year”

Hostel

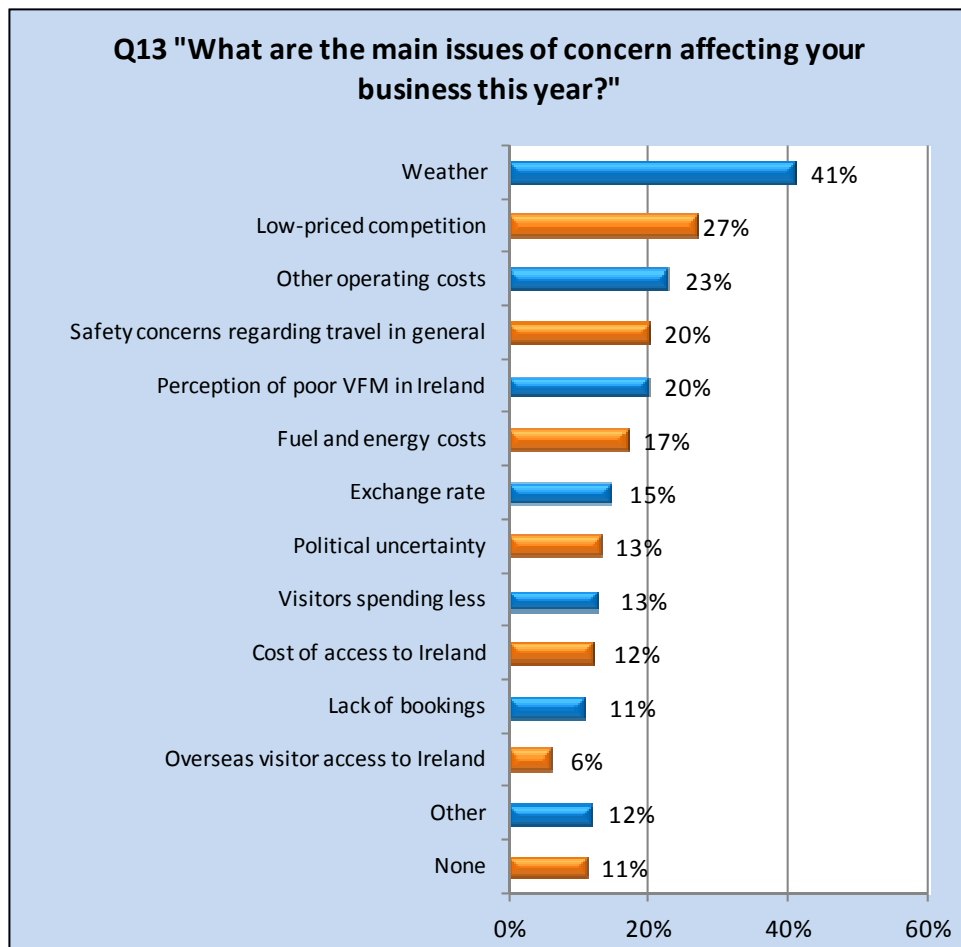
“Wild Atlantic way marketing beginning to kick in as obvious from booking enquiries”

Caravan / camping

“The ongoing promotion of the Wild Atlantic Way”

B&B

15. Issues of Concern in 2016



Base: 660

Huge drop in concern for energy costs

- 15.1 The last 12 months have seen a significant drop in the number of operators who see fuel and energy costs as a concern.
- 15.2 While the costs sat at the top of the table for years, the proportion of respondents who report energy bills as a worry has fallen from 63% in 2014, to 40% in 2015 – now that proportion has reduced to 17%.

Weather woes for some

- 15.3 Two in five (41%) responding operators think that the weather may have a negative impact on their business this year. Higher proportions of caravan and camping operators (63%) and attractions (55%) are concerned about the weather in 2016, compared to other sectors.

“Mainly the weather”
Attraction

“Only the weather”
Attraction

Fears over Brexit

- 15.4 Some operators believe that if Britain votes to leave the European Union in its June referendum, the decision will have a negative impact on their tourism business.

“UK exiting EU”
Hotel

“UK EU referendum”
Restaurant

“Brexit”
Hotel

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 December 2015, Strategic Marketing, an independent research agency, was commissioned to continue conducting the survey for the next three years.
- 16.3 Fieldwork for this first wave in 2016 took place in April. The objectives were to measure:
- Business performance to date in 2016 in terms of visitor volume – overall and by key markets – and profitability
 - Average room yield (hotels)
 - Visitor volume expectations for the remainder of 2016
 - 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.
- 16.6 Fáilte Ireland provided a database of 3,121 usable contacts (i.e. not opted out) for the survey spread across nine 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 460 responses were received to the online survey – a response rate of 15%.
- 16.8 Following this, we conducted 200 ‘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	116	55	171
Guesthouses	28	39	67
Bed & Breakfast	125	34	159
Self-catering	64	5	69
Hostels	23	8	31
Caravan / camping	18	6	24
Attractions	53	16	69
Restaurants	28	14	42
Golf	5	23	28
Total	460	200	660

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.