STRATEGIC MARKETING

Fáilte Ireland
National Tourism Development Authority

Tourism Barometer

May 2011

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1. Headline Findings

Background to the Tourism Barometer

1.1 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.

1.2 We received 949 responses to an online survey and conducted 76 telephone interviews with tourism businesses between 16th May and 3rd June 2011. We also conducted ten depth interviews with senior industry executives. More details on the methodology can be viewed in appendix 1.

Tourism businesses more confident about their performance and prospects

1.3 Three quarters (74%) of tourism businesses believe that the performance of their company this year will be up on or the same as last year. This confidence compares to the fact that only half (49%) of all tourism businesses felt this way in early 2010 and only one in five (21%) had the same level of confidence in the same period during 2009.

1.4 Already in 2011, about four in ten (42%) operators are reporting that their business is up with about a further three in ten (27%) holding level. Two years ago, eight in ten businesses (80%) were reporting that activity levels were down for the same period.

Visitors levels up in hotels, self-catering and golf clubs

1.5 Visitor levels year to date are reasonably good in hotels (43% reporting increase), self-catering (41% reporting increase) and in the golf clubs sector, where nearly half (46%) of businesses report an increase in visitor volumes compared to 2010.

Hard times for B&Bs however

1.6 The picture is very different in the B&B sector however, where about one in five (19%) businesses report increased visitors, but the majority (59%) report a decrease.

Camping is popular again in the domestic market

1.7 The caravan / camping sector is experiencing a strong domestic market, whereby camping appears to be becoming trendy again in the recession.

British aren't coming

1.8 The key overseas market of Great Britain is not performing well this year. British holidaymakers, with financial constraints of their own, are staying within their own borders. Every sector has reported a decrease in GB visitors.

Profit margins under severe pressure in all sectors

1.9 Whilst visitor volumes are up for some sectors, profitability is down in all sectors. Maintaining or increasing visitor volumes is coming at the expense of reduced prices, whilst soaring operating costs are eating into profit margins at the other end. Very aggressive pricing from NAMA operated or bank owned hotels due to over-capacity is a serious concern in the accommodation industry. B&Bs are hardest hit, where about seven in ten (71%) report a decrease in profitability.

Employment reduced

1.10 With profit margins under so much pressure, employment is inevitably down. Just 4% of operators that employ staff are employing more full time staff than last year. 9% are employing more part time staff and 8% are employing more seasonal staff.

Feeling that Ireland has turned the corner

1.11 The outlook for the remainder of the year in terms of visitor volumes is positive in many sectors, especially hotels (56% expect increased visitors against last year), attractions (51% expecting increase) and self-catering (38% expecting increase).

1.12 There is a sense among some operators that Ireland has 'turned the corner' and that things are only going to get better from now on. A buoyant domestic market this summer is a key hope.

Business tourism is recovering

1.13 Business tourism is showing signs of picking up again following a very difficult few years. One in ten (10%) hotels say business tourism from the Ireland market is 'significantly up' on 2010 and three in ten (30%) say it is 'slightly up'.

The Queen and the US President – reasons for hope

1.14 The recent visits of Queen Elizabeth and Barack Obama have brought much optimism to operators, with the hope of revitalised overseas markets.

Tax cuts a bonus

1.15 Reductions to VAT, employer's PRSI and the abolition of travel tax are very welcomed by the industry.

2. Contextual Background to Quantitative Findings

2.1 Half (49%) of all tourism operators believe that their business performance will rise this year – a significant jump from 7% who believed the same just two years ago. Three quarters (74%) of tourism businesses believe that the performance of their company this year will be up on or the same as last year. This confidence compares to the fact that only half (49%) of all tourism businesses felt this way in early 2010 and only one in five (21%) had the same level of confidence in the same period during 2009.

2.2 Already, on the basis of their performance during the first five months of this year, about four in ten operators (42%) are reporting that their business is up with about a further three in ten (27%) holding level. Two years ago, eight in ten (80%) businesses were reporting that activity levels were down for the same period.

Accommodation Providers	Year to Date			Prospects for the Season		
	2009	2010	2011	2009	2010	2011
Up	9%	24%	42%	7%	28%	49%
Same	11%	19%	27%	14%	21%	25%
Down	80%	57%	31%	79%	51%	26%

Note: the above table is weighted to reflect the number of beds, or equivalents, represented by each accommodation sector

Below we outline the overall industry picture based on depth interviews with industry leaders (see appendix 1, para. 10.11 for more details).

British not coming over so much

2.3 British holidaymakers, a crucial market for the Irish tourism industry, are not coming so much this year. Operators recognise that Britain has 'financial problems of its own', and aggressive marketing from within Britain (Scotland, Wales and English regions) is successfully pushing 'staycations'. Ireland is also perceived by the British as expensive.

"Ireland has lost market share. There's strong competition from within Britain – Scotland and Wales in particular"

Other overseas markets are looking good

2.4 The key markets of France, Germany and the USA appear to be quite strong, and the outlook is particularly positive.

"Double digit growth is predicted in 2011 for the USA – special offers from airlines have helped. There is also a projected increase for [mainland] Europe this year. We've definitely seen the tide turn"
Incoming Tour Operators Association

"The German market appears to be coming out of the recession the quickest and so we are increasing our capacity and focus in Germany"
Aer Lingus

Domestic market: camping is trendy again

2.5 Caravan & campsites have benefited from the recession as families have sought cheaper accommodation. The domestic market is expected to be strong in this sector this summer if the weather is fine.

"Camping is becoming trendy again with families. Together with the recession and good April weather, we had a bumper Easter. We are hopeful for a good domestic market this summer to make up for the loss of the English"
Irish Caravan and Camping Council

Tourism hotspots are doing quite well; non-hotspots are not

2.6 Tourism hotspots are faring well across the various sectors, but outside of the hotspots, trade is well down.

The Queen and the President

2.7 The visits from Queen Elizabeth and Barack Obama were very welcomed as the resulting publicity has helped to put Ireland 'back on the map'. Whether either visit actually translates into increased bookings from Britain and the USA remains to be seen, but at least the visits have given the industry something to get excited about.

"It helps the feel good factor, even if it doesn't necessarily translate into visits"
Incoming Tour Operators Association

There are other reasons to be positive

2.8 There is a general feeling that industry performance is slowly starting to pick up following two extremely difficult years. Travel tax is being abolished, VAT is being reduced, and improved roads and airports are making it easier to function as an industry.

"There's room for optimism ... the abolition of travel tax should mean the airlines bring more people in, and the improved east-west roads now make it possible to do a day trip from Dublin to the Cliffs of Moher"
Coach Tourism and Transport Council

"The number of new vehicles in fleet is much higher than last year. That's a sign of confidence that things are picking up"
Car Rental Council

Accommodation is over-capacity

2.9 The biggest issue affecting the accommodation sectors is that there are too many beds for the available demand. Consequently many hotels, especially those which are NAMA financed or bank-owned, are slashing prices to a level which is impossible for other operators to compete with. It is felt that B&Bs are put into particular difficulty because they cannot cross-subsidise room revenue with bar and restaurant revenue in the way that hotels can.

Soaring fuel prices have squeezed margins

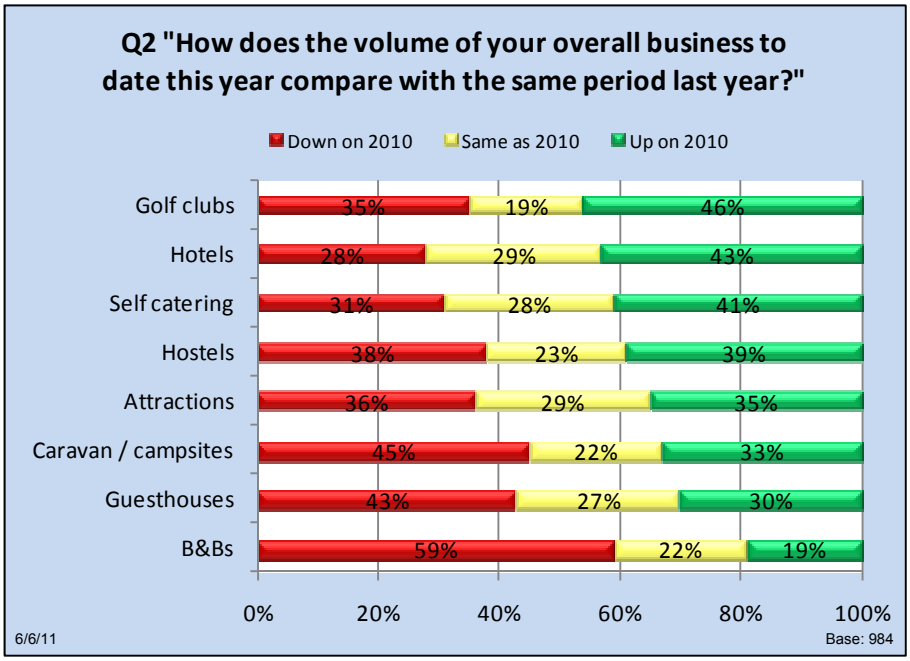
2.10 The transport sectors have been hit particularly hard by soaring fuel prices. There is a limit to how much they can pass this onto consumers in the current economic climate.

"Rising fuel costs eat into the profits and so we need to find other ways to cut costs"
Aer Lingus

3. Visitor Volumes Year to Date

3.1 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).

Overall visitor volumes to date



Aggressive pricing to raise visitor volumes

3.2 Looking at business performance solely in terms of visitor volumes, the golf club, hotel and self-catering sectors have had a successful year to date. There is evidence in all three of those sectors that operators have deployed aggressive pricing to achieve their visitor number increases.

"Price reductions have stimulated some spring business"
Golf club

"Reduced green fees have produced more footfall for the golf club"
Golf club

"We have dropped our prices significantly and it may help for the rest of the year"
Self-catering

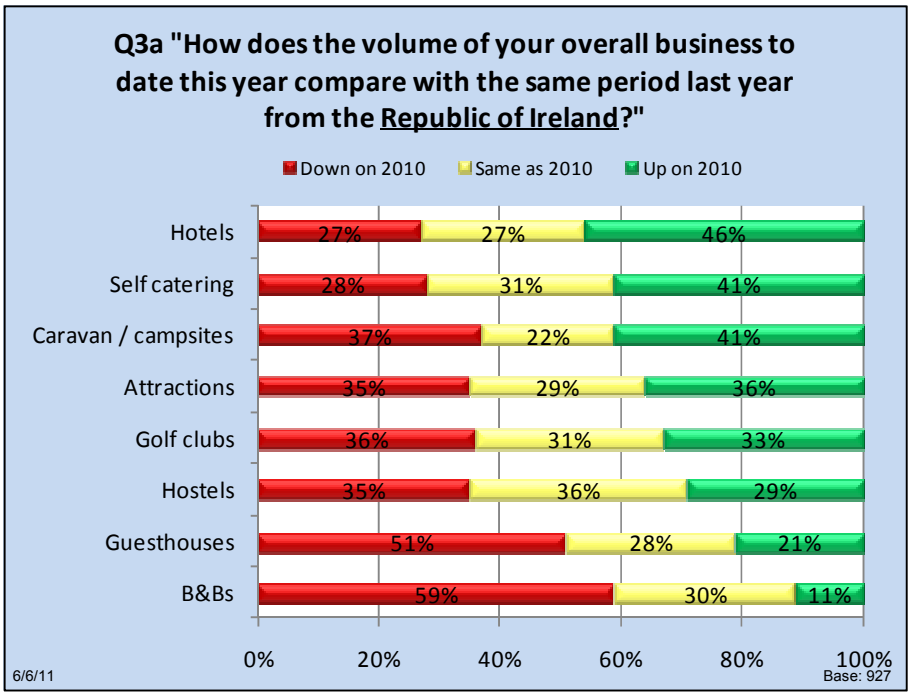
Hard times for B&Bs

3.3 At the other end of the scale, B&Bs are having an extremely difficult year, largely as a result of the very aggressive pricing in the hotel sector. NAMA or bank-funded hotels are frequently quoted as deploying this strategy.

"Hotels prices affecting B&B business ... NAMA style hotels forced to sell below cost"
B&B

"Hotels are giving away rooms"
B&B

Domestic visitors



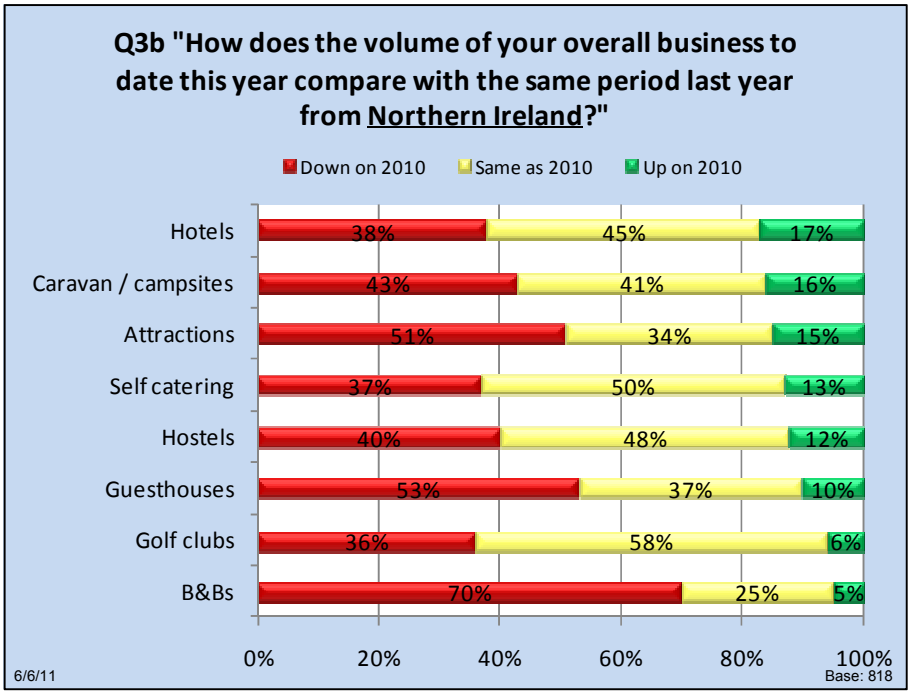
3.4 Domestic visitor volumes to date by sector show a similar picture to the overall visitor volumes.

Camping is trendy again in the domestic market

3.5 In the caravan & camping sector, businesses increasing their visitor volumes to date have mostly done so through the domestic market.

"Camping is back. Caravans that were retired are back in use. Good product, price, personality"
Caravan / campsite

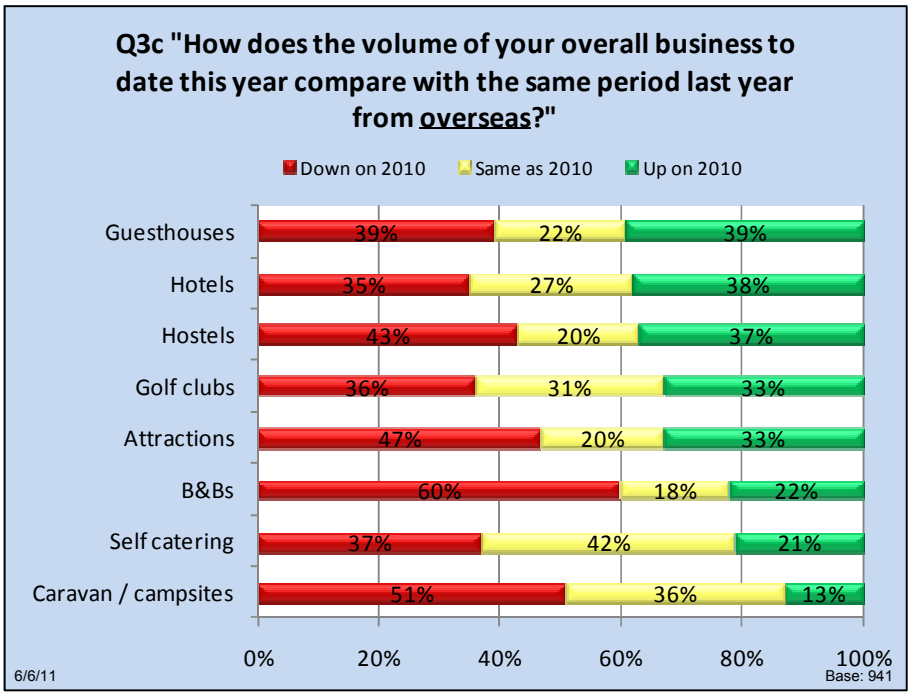
Visitors from Northern Ireland



Northern Ireland market is significantly down

3.6 Visitors from Northern Ireland are significantly down in every sector.

Overseas visitors



Varying overseas market by sector

3.7 Overseas visitor levels vary by sector. In the guesthouse, hotel, hostel and golf club sectors, levels are reasonably stable.

"Improved business sentiment overseas"
Hotel

"Increased demand from overseas market, especially USA"
Hotel

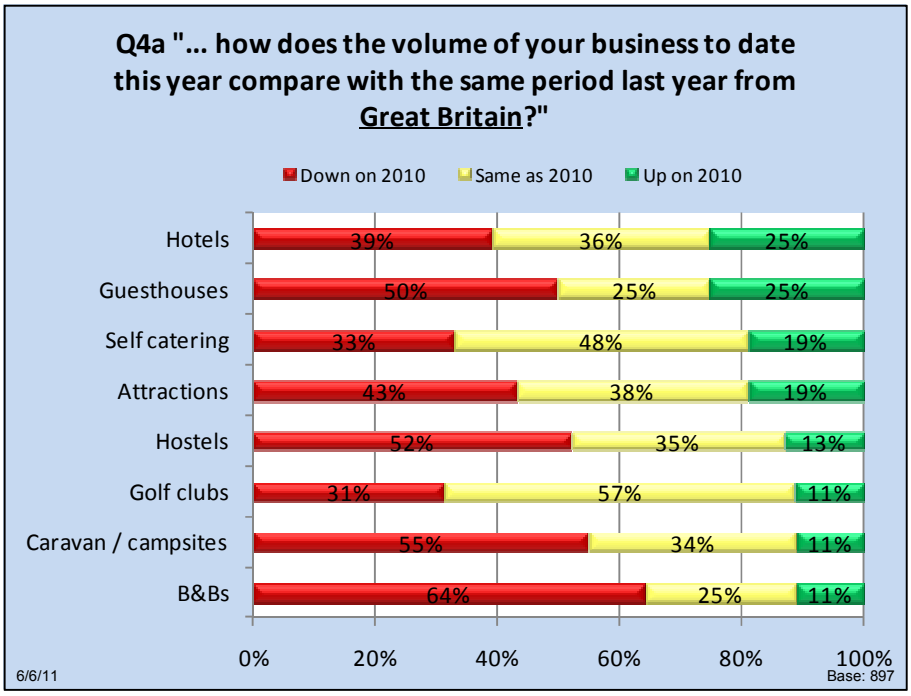
3.8 The B&B and caravan & camping sectors in particular have not been attracting overseas visitors so far this year. In caravan & camping, references have been made to the cost of ferry travel, which is very important to this sector.

"The cost of the ferries is a major concern for all our overseas customers. The exchange rate for the pound seems to be prohibiting the English from attempting to travel as well as the cost of the ferry"
Caravan / campsite

"Ferry crossing is too expensive for overseas market"
Caravan / campsite

Visitors from Great Britain

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



Visitors from Britain down in every sector

3.10 Great Britain in the most important overseas market for the Irish tourism industry, but so far this year, the visitors haven't been coming like they normally do. Britain has financial problems of its own, and its national and regional tourist boards have seized the opportunity to promote 'staycations', keeping holidaymakers within Britain's borders.

"Very few enquiries from the UK and don't envisage any change for the next month at least"
B&B

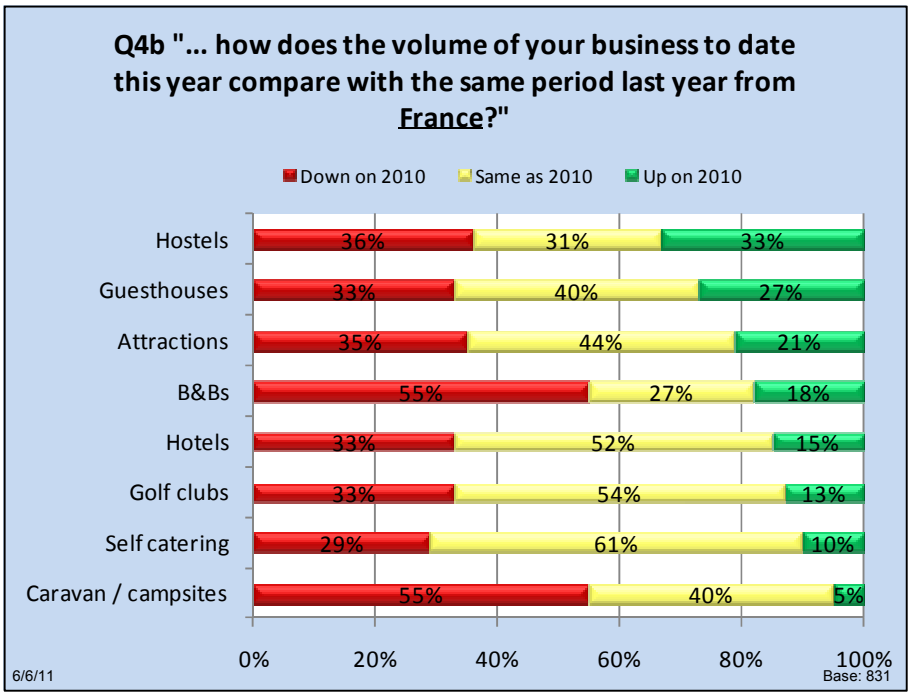
3.11 Ireland is also struggling to shake off its reputation among the British of being expensive, especially for eating out and drinking.

"Ireland is still too expensive for food and drink"
Attraction

"Ireland is still perceived as an expensive destination"
B&B

"Restaurant and pub prices are still much too high"
B&B

Visitors from France



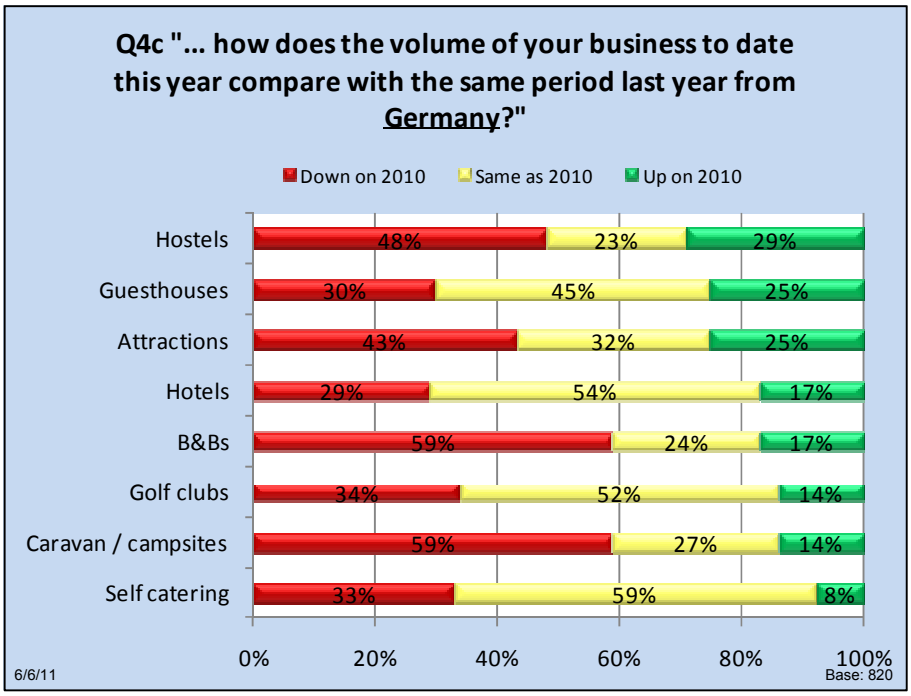
French market stable in hostel and guesthouse sectors

3.12 The hostel and guesthouse sectors are seeing overall stable visitor volumes from France. In all other sectors, the market is down.

"Very positive bookings coming from France, which I cannot explain"
Hostel

"Seems to be more marketing, especially in France"
Guesthouse

Visitors from Germany



German market varies by sector

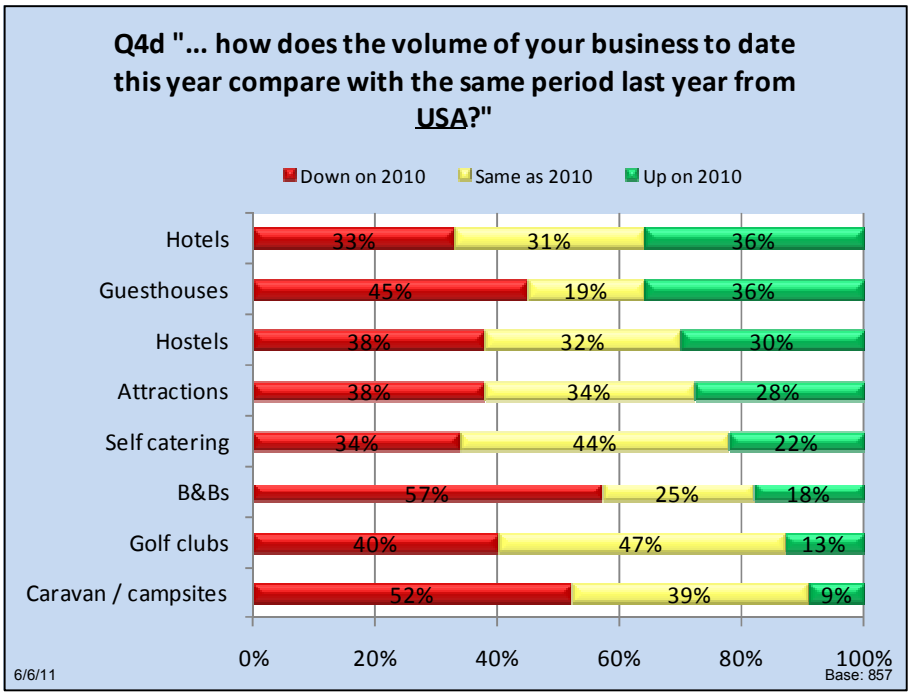
3.13 German visitor levels vary by sector, but the overall picture is down. As with French visitors, there are some signs of the German market picking up for hostels and guesthouses.

"Return of the German market - perception of costs being lower and Ireland being better value"
Hostel

"French and German economies positive in general"
Hostel

"Fall off in French and German tourists"
B&B

Visitors from USA



American market picking up for hotels

3.14 American visitor levels are looking quite positive for the hotel sector, and comments suggest that this market is performing well.

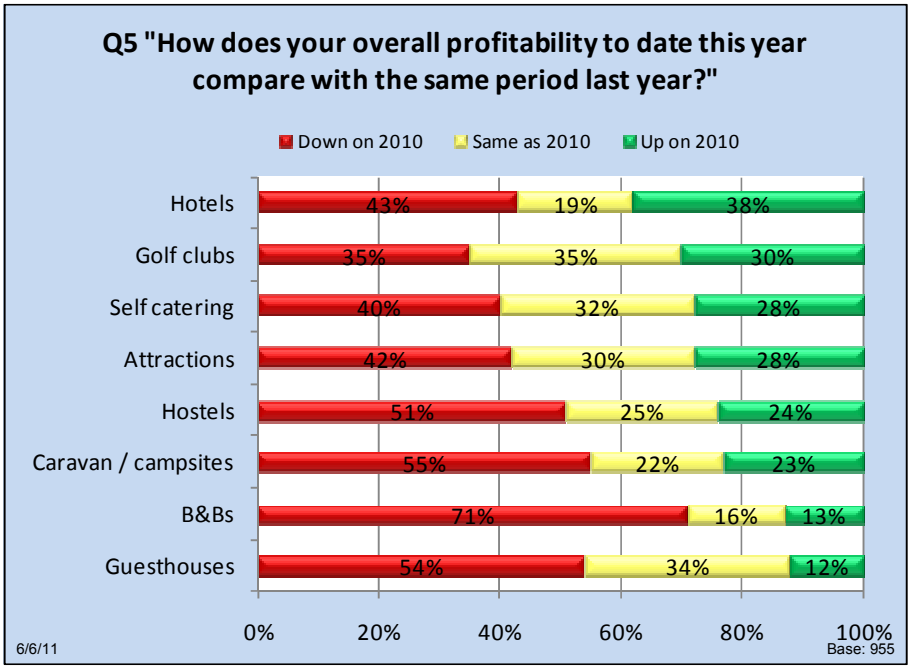
"The American market is up. The Americans are travelling again"
Hotel

"Increase in number of Americans visiting Galway"
Hotel

"American market - prices of accommodation and flights are good"
Guesthouse

4. Profitability and Average Room Yield

Profitability



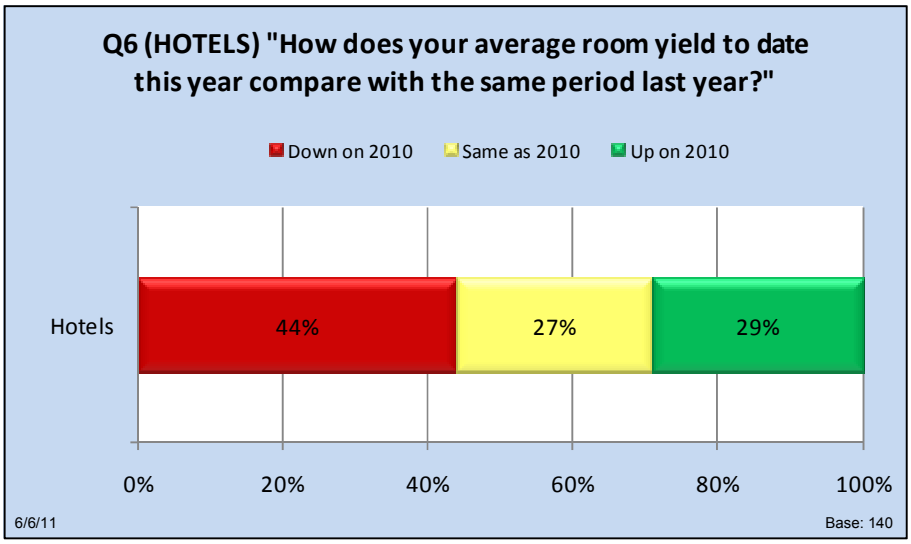
Profitability is down in every sector

4.1 Whilst visitor volumes are up for some sectors, profitability is down in all sectors. Maintaining or increasing visitor volumes is coming at the expense of reduced prices, whilst soaring operating costs are eating into profit margins at the other end. These issues are discussed fully in section 9 (Issues of concern affecting businesses).

"Overall running cost; low profit margin, if any profit at all"
Guesthouse

"Price increases (in particular oil i.e. home heating) plus foodstuffs. In other words our costs have increased, but we cannot really increase our prices because people won't pay them, so our profits go down"
B&B

Average room yield



4.2 The above question was asked just of hotel operators.

4.3 Visitor levels are up on 2010 for over two in five (43%) hotels, but average room yield is only up for about three in ten (29%).

4.4 Aggressive pricing strategy by NAMA or bank-owned hotels is a major issue of concern for hotels with other types of ownership as the industry deals with over-supply (discussed in more detail in section 9 later).

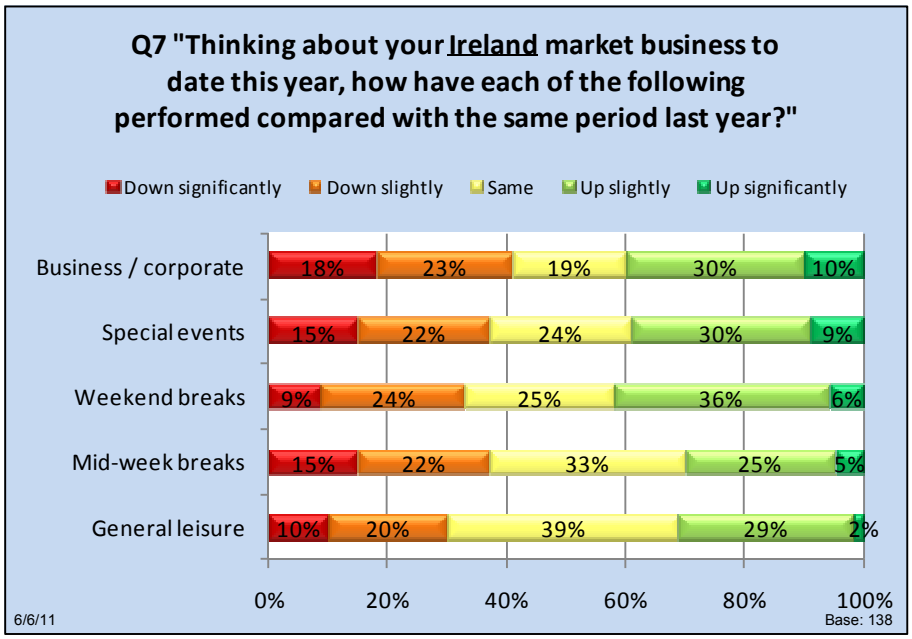
"Our room rates are just above breaking even"
Hotel

"Unfair competition from other hotels offering stupid and cheap rates but not paying rates and bank rates etc. and NAMA hotels still operating"
Hotel

"NAMA hotels are allowed to operate in the same parameters as family run hotels"
Hotel

"Under-pricing by two NAMA hotels within 6 mile radius - too many hotel beds in this area"
Hotel

5. Types of Booking – Hotels (Ireland Market)



5.1 The above question was just asked of hotel operators and refers to the Ireland market only.

Business tourism is recovering

5.2 The good news for the hotel sector right now is that business tourism is showing signs of picking up again following a very difficult few years.

"Overseas conference market is beginning to pick up"
Hotel

"Customers on overnight business trips are significantly up"
Hotel

"Positive growth in demand for conference facilities – increase in pick-up from existing accounts and growing market share"
Hotel

5.3 Feedback from ITOA is that overseas business tourism coming in through incoming tour operators is being won at lower margins than before, but at least the trade is on the up again.

"It's looking much healthier. The cost of winning work is so much higher because now procurement people are making the decisions instead of

marketing people and the budgets are smaller, but trade is getting back to where it should be"
ITOA

Events are good for business

5.4 Events, whether organised by the hotel or happening in the local area, are good sources of business.

"Reduction in VAT from July will assist in making large events better value and hopefully increase spend"
Hotel

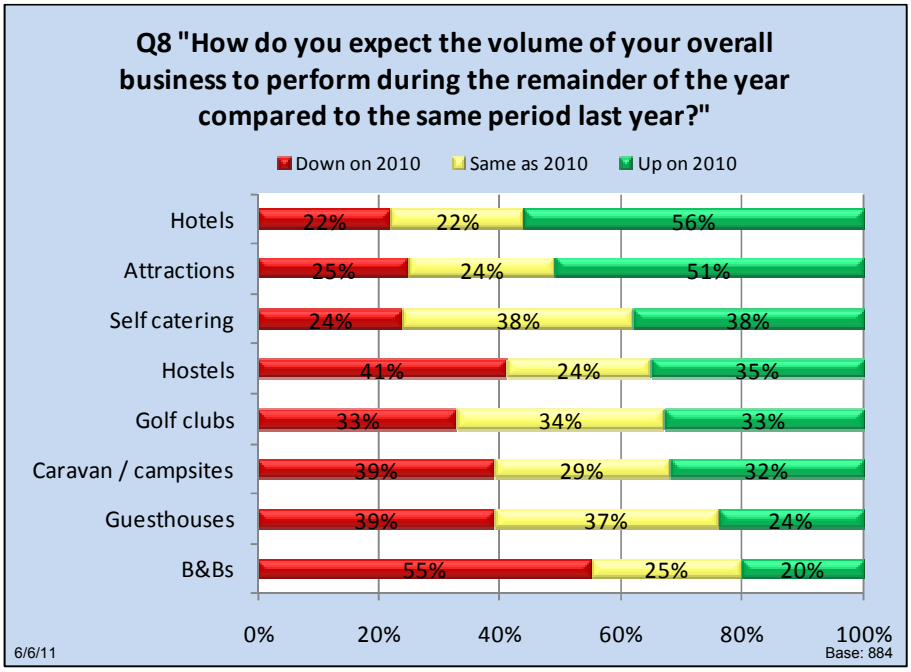
"A lot of local sporting events at weekends have been a great boost for rooms"
Hotel

Weekend breaks performing well

5.5 About two in five (42%) respondents say that weekend breaks are up on last year.

6. Expectations

Overall expectations



Outlook is quite positive

6.1 In many sectors, especially hotels, attractions and self-catering, the outlook for the remainder of the year in terms of visitor volumes is positive. There is a sense among some operators that Ireland has 'turned the corner' and that things are only going to get better from now on.

"Better business sentiment, realisation that things are not as bad as first thought, change of government, a bounce expected, state visits and better competitiveness in product costs"
Hotel

"A lot of our guests are here on business - definitely a surge in business related guests"
Self-catering

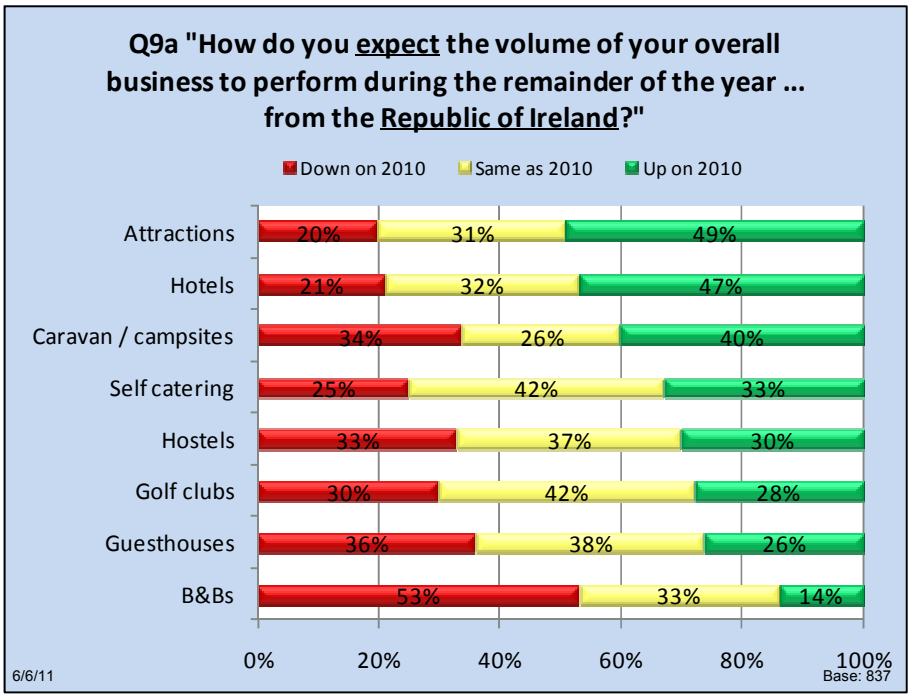
"Improved moral. More loyal customers in current climate"
Hotel

"We expect the number of visitors to improve owing to good value in hotels and reduction in VAT which should make eating out cheaper"
Attraction

6.2 Whether profitability holds up is a different matter, but at least the custom is expected to be out there to compete for.

"Our low rates are bringing in customers – even if we're not really getting a strong bottom line. Weekends are holding their own in the groups, hens and golfers market"
Hotel

Domestic expectations



Hopes for a buoyant domestic market

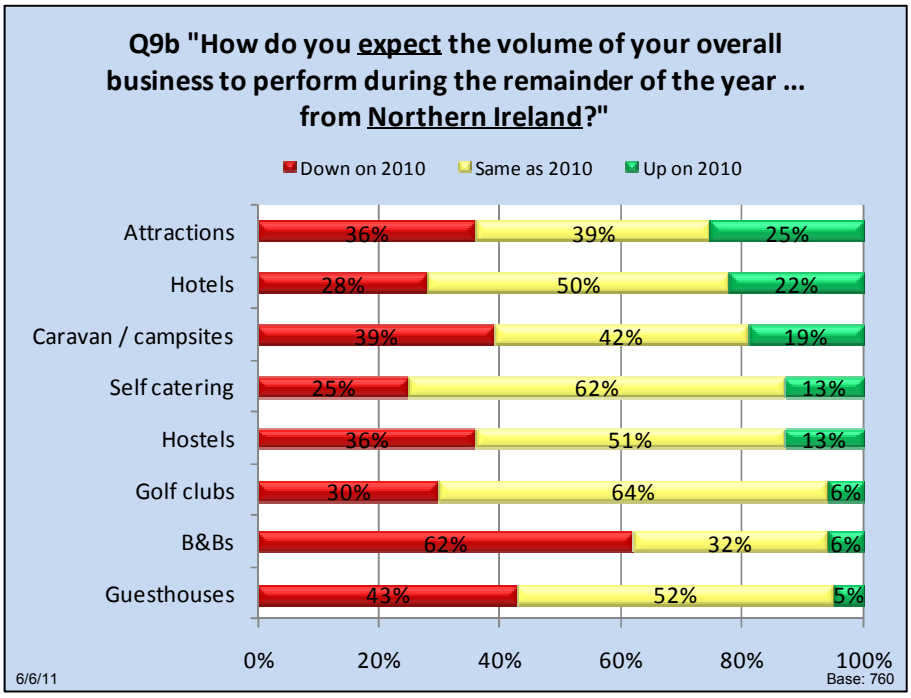
6.3 Expectations regarding the domestic market are fairly strong in all sectors except smaller serviced accommodation. It is hoped that Irish people will holiday in Ireland this year, as there is already evidence of.

"Main positive factor this year is the number of Irish people holidaying at home"
Guesthouse

"Surfing has become huge in our area, resulting in a sizeable increase in young Irish visitors"
Guesthouse

"Rise in Irish holidaying at home during the school breaks"
Hotel

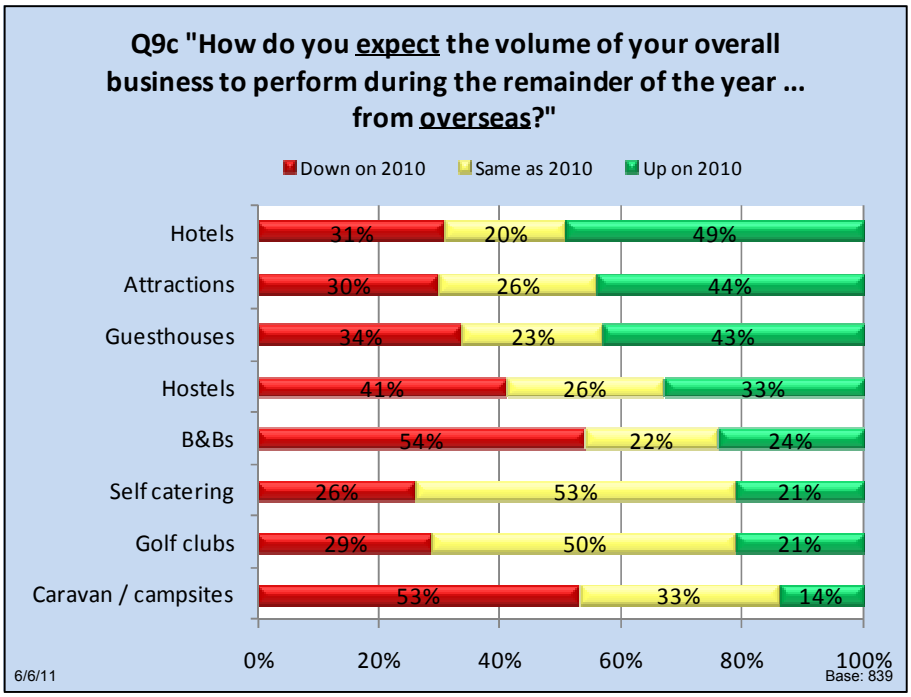
Northern Ireland expectations



Northern Ireland not expected to improve yet

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

Expectations from overseas



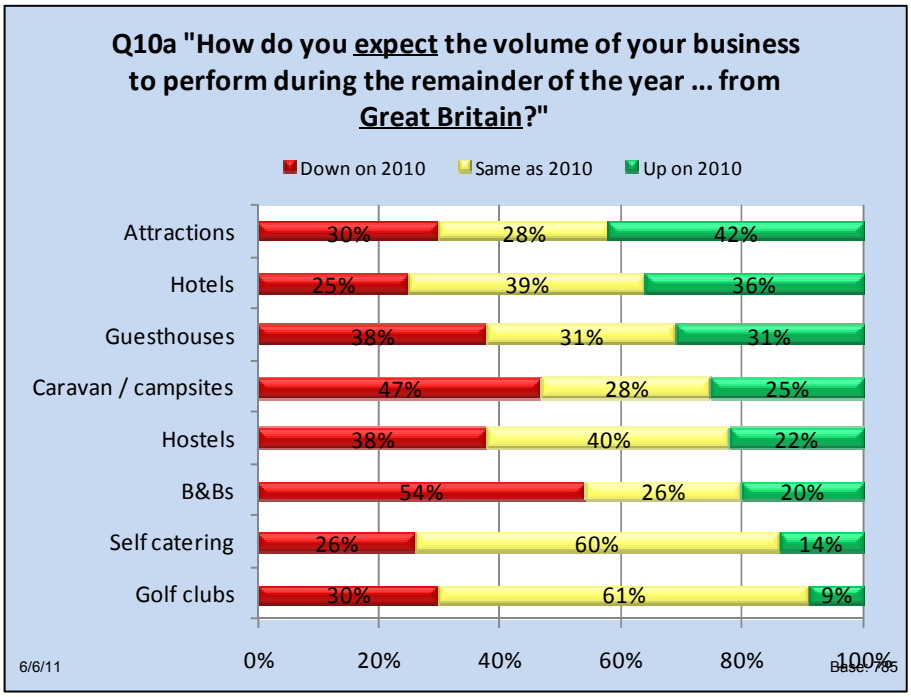
Optimistic outlook for overseas

6.5 Expectations for the overseas market are quite positive in most sectors, especially among hotels, attractions and guesthouses. The recent visits from Queen Elizabeth and Barack Obama have brought optimism (discussed again in Section 8 later).

"Hopefully the Queen's visit and Obama will help our overseas business"
Self-catering

Expectations for Great Britain

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



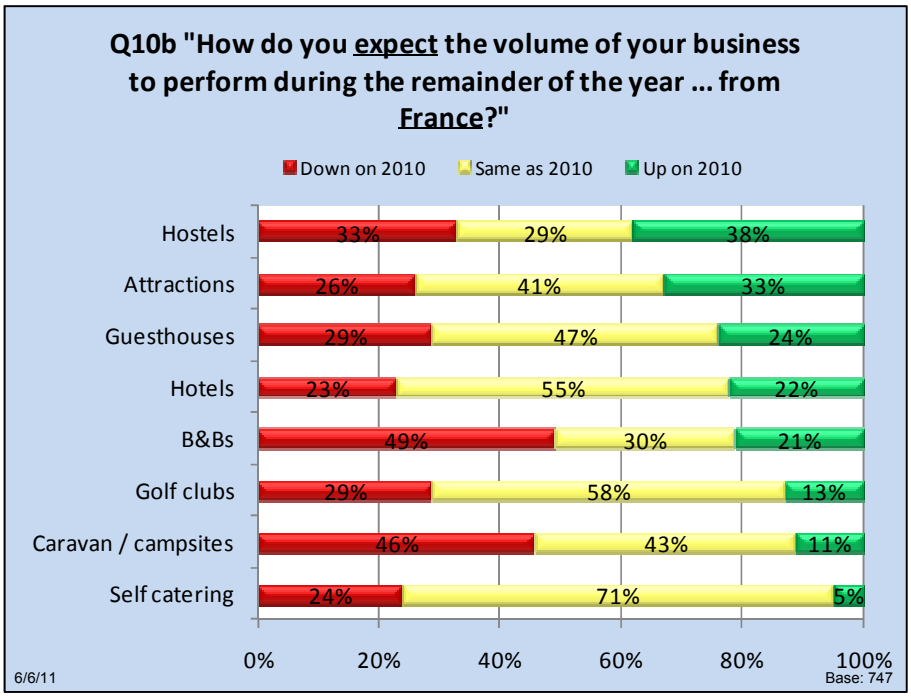
No quick recovery from Great Britain

6.7 The key overseas market of Great Britain has not been performing well this year, and the general expectation is that it's not likely to improve significantly any time soon.

"Very few enquiries from the UK and don't envisage any change for the next month at least"
B&B

"Poor euro rate for UK visitors"
B&B

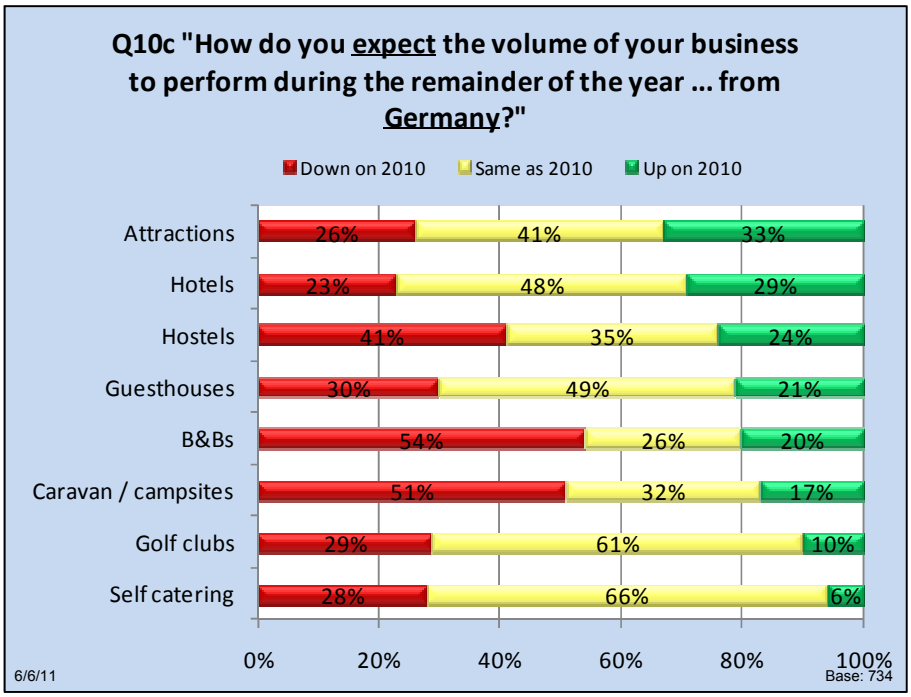
Expectations for France



Mixed views for France

6.8 Expectations for the French market vary, with optimism highest among hostels, attractions and guesthouses – the three sectors experiencing the most increases in French visitor levels so far this year.

Expectations for Germany



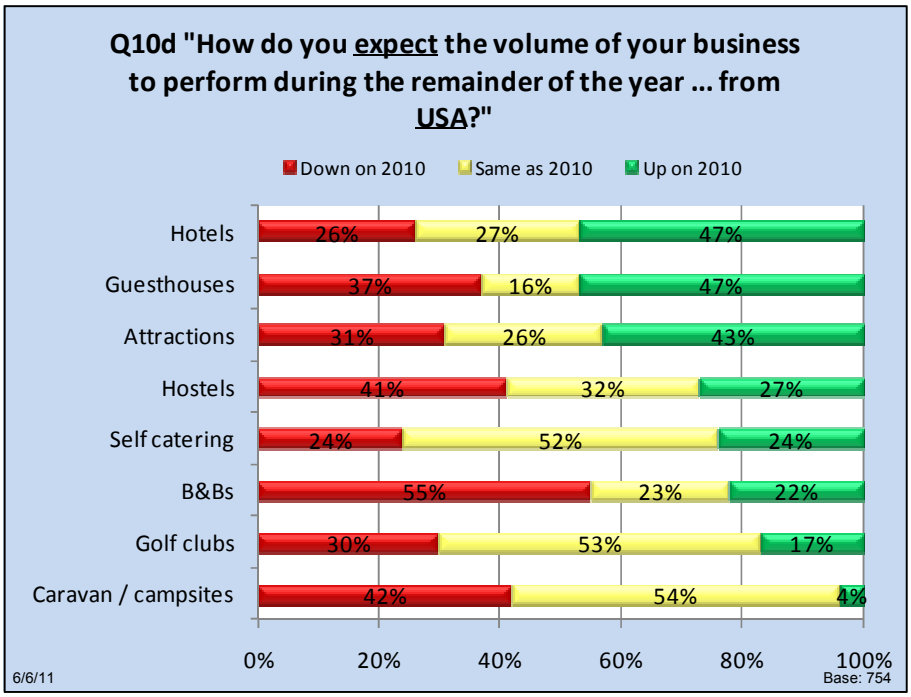
Some optimism for Germany

6.9 Expectations for German visitors are fairly mixed, with the highest expectations found among attractions and hotels.

"10,000 German tourists coming to stay in Lisdoonvarna between April and November 2011 (last year it was 7,000)"
Attraction

"Growth in the German economy"
Attraction

Expectations for USA



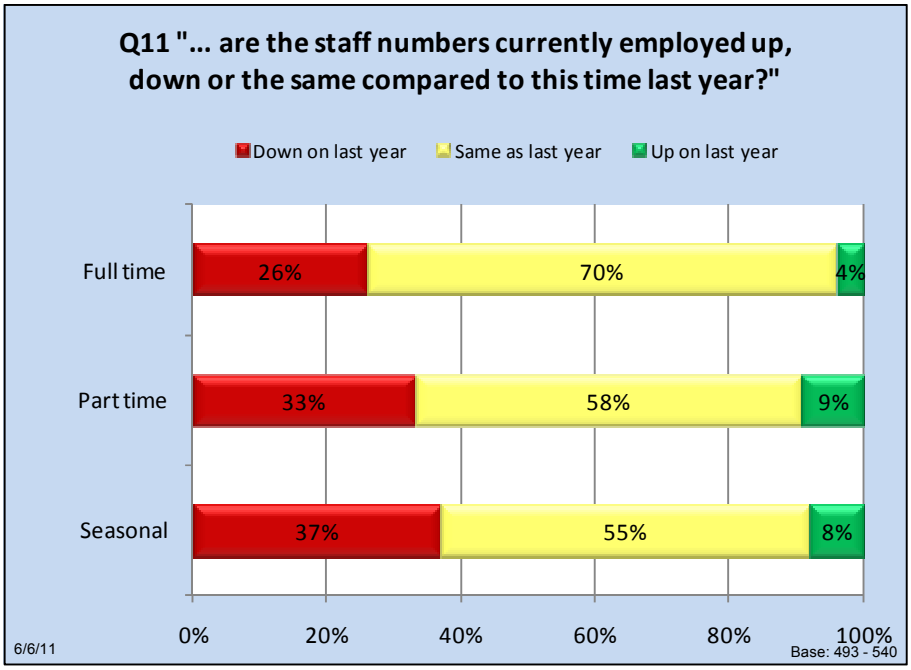
Americans are travelling again

6.10 Figures and comments suggest that the American market is on its way back following a time of being subdued. Attractions, hotels and guesthouses in particular are expecting much from this market. The visit of the President is expected to give this market a boost.

"I expect ... the USA president visit will renew interest in Ireland"
B&B

7. Employment

7.1 As many respondents (around half) do not employ any staff (other than the proprietors), base numbers for the employment questions are low and so results are grouped overall. In any case, differences in results by sector are not particularly significant.



Jobs are harder to come by in the tourism industry

7.2 As profit margins are under severe pressure, inevitably staffing levels are being cut across all three types – full time, part time and seasonal. Reduction in employers PRSI may help the situation somewhat.

"I think the idea of employers PRSI in the first place is ridiculous ... the government taxes businesses when they create jobs and provide employment (which is saving them money by taking them off welfare)"
Guesthouse

"Cost of PRSI on staff"
Hotel

"My business is now on a skeleton staff and we are doing numbers that we would do only usually do in November, it is so quiet"
Guesthouse

"Issues of concern: staff wages, possibilities of staff cuts and staff wage cuts"
Self-catering

"We would like to hire more part-time and seasonal staff, however we can't afford to hire more staff due to PAYE/PRSI, holiday pay, bank holiday pay, etc"
Caravan / campsite

8. Positive Factors Affecting Business

8.1 Respondents have given open-ended answers to the question, "What are the main positive factors, if any, affecting your business this year?" The main themes are discussed below.

The Queen and the US President visiting

8.2 The most frequently (11%) mentioned factor is the recent visits of Queen Elizabeth and Barack Obama, which have brought optimism to the industry during challenging times. It is not yet known if or to what extent this might translate into bookings, but nevertheless, it's good PR for Ireland.

"Hoping that the recent visits of Queen Elizabeth & President Obama will improve the number of UK and US visitors later in the season"
B&B

"Hopefully the Queen's visit and Obama will help our overseas business"
Self-catering

Pro-active marketing

8.3 6% of respondents have stated good marketing as a positive factor – either their own, or marketing of their area by tourism bodies. Attractions (15%) in particular have mentioned marketing, and this sector appears to be fairly pro-active in doing its own.

"We have undertaken a marketing programme with a coach company to bring more school and active retirement groups from Northern Ireland"
Attraction

"Local advertising, local radio, leafleting hotels and B&B's"
Attraction

Tax cuts

8.4 Various tax cuts recently announced including in VAT, employer's PRSI and the abolition of travel tax are very welcomed by the industry. This has been mentioned by 5% of respondents.

"VAT and employer PRSI reductions will help profitability"
Hotel

"The reduction of VAT to 9% is a life saver. It enables us to provide very competitive packages to tourists"
Guesthouse

Irish holidaying at home

8.5 4% of respondents say that Irish people have been staying in Ireland more, or that they expect this to happen this summer because of limited disposable income. This type of comment is more prevalent among the self-catering and caravan & camping sectors.

"Recession-driven self-catering holidays"
Self-catering

"More people are staying in Ireland and holidaying locally"
Self-catering

"More Irish staying in Ireland for their holidays. Camping is an affordable holiday for everyone, so we should see an increase in this type of holiday"
Caravan / campsite

"A huge marketing drive on the home market by the ICC has made the sector very attractive"
Caravan / campsite

Fast track from Dublin

8.6 Some factors mentioned are not significant to most respondents, but they are significant to certain parts of the country or certain sectors. The improved road infrastructure, most notably the Dublin-Cork motorway, is a good example.

"Closer access to Dublin since the new motorway opened last year"
Attraction

Weather-dependent camping

8.7 About one in four (26%) caravan & campsites mentioned the weather as a positive factor, either that it was good in April or that a heat wave is expected in the summer. This is the most weather-dependent sector, and the rain needs to stay away if the sector is to capitalise on the expected buoyant domestic market.

"We are promised a heat wave, which would be grand"
Caravan / campsite

"Had a great start because of Easter here. Weather was fantastic; it's all down to the weather here as we're on the coast"
Caravan / campsite

9. Issues of Concern Affecting Business

9.1 Respondents have given open-ended answers to the question, "What are your main issues of concern, if any, affecting your business this year?" The main themes are discussed below.

Crippling operating costs

9.2 28% of respondents give rising operating costs as a key issue of concern. 10% specifically mention energy, but aside from that, pretty much all costs associated with running a business in the tourism industry seem to be rising, including rates, insurances, food & drink, utilities and in some cases (especially hotels) wages.

"The general running costs with council rates, water rates, wages, insurance etc. It's hard to survive from year to year let alone make a profit"
Hotel

"Running costs are far too high. We are getting the same money as we got 20 years ago"
B&B

"Costs ... power, supplies, transport, rates, general overheads and wages"
Attraction

"Cost, wages too high, local rates – water, PAYE etc, taxes, bills"
B&B

Price slashing

9.3 Whilst profit margins are being squeezed at one end by rising operating costs, they are also squeezed at the other end by being forced into lowering prices to compete. 19% of respondents give this as a key concern.

9.4 There are two main reasons for declining room rates in the industry. One is the fierce competition from NAMA or bank-funded hotels offering rooms at rates which are impossible for others to compete with.

"Banks bailed out by the government have reduced their rates below bed and breakfast rates so it is impossible to compete. We are facing a massive fall in market and a 50% fall in rates"
B&B

"NAMA hotels should be closed as they are offering greatly reduced prices but are not able to maintain property"
B&B

"Local competitors are undercutting to the case where margins are becoming non-existent"
Hotel

"There are 2,451 hotel rooms within a 30km radius of my business. 1,615 of those are operated by the banks / NAMA / the receiver. I simply cannot compete with the offers they are doing, particularly the mid-week ones. As a consequence we are closed mid week now. Eventually the bank run properties will squeeze us out"
Guesthouse

9.5 The second reason for falling room rates is that consumers are hunting for bargains and are often not prepared to pay standard rates anymore.

"Everyone is looking for a bargain, and if it's not cheap they go somewhere else. Since dropping prices we're bringing in the guests but no profit"
Self-catering

Bookings down

9.6 13% of respondents comment generally that bookings are very down, especially B&Bs (20%)

"Business is so bad, will we still be here in August?"
B&B

"By the looks of things, my business is in big danger and I cannot see how I can continue"
B&B

"The business is just not there at the moment, so there is no point in getting upset about it"
B&B

Regional access affected by decline in flights

9.7 Access to the west of Ireland is affected significantly by the reduction in flights to Shannon airport.

"So few flights coming in and out of Shannon Airport"
B&B

"Absence of connectivity from/to Shannon Airport"
Hotel

10. Appendix 1 – Background and Methodology

Background and Objectives

10.1 The Fáilte Ireland Tourism Barometer is a survey of tourism businesses designed to provide insight into tourism performance for the year to date and prospects for the remainder of the season. It has been conducted regularly since 1999.

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

10.3 Fieldwork for this wave took place following the Easter and May bank holiday period. The objectives were to measure:

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

Methodology

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

10.5 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.

10.6 Fáilte Ireland provided a database of 3,547 usable contacts for survey spread across eight industry sectors (discussed under 'sampling' below). An email was sent on 16th May to all contacts on the database containing a link to the online survey and an explanation of the survey objectives. A reminder email was sent after four days to non-responders.

10.7 A total of 949 responses were received to the online survey – a response rate of 27%.

10.8 Following this, we conducted 76 'top-up' interviews by telephone with non-responders in the smaller sectors in order to improve the robustness of their

individual sample sizes so that results can be reported by sector. Interviews were conducted in daytime and evening hours with business owners or managers.

10.9 Both the telephone and the online surveys were brought to a close on 3rd June.

Sampling

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

Sector	Online responses	Telephone top-ups	Total sample size
Hotels	141	-	141
Guesthouses	85	-	85
Bed & Breakfast	515	-	515
Self-catering	27	25	52
Caravan / campsites	26	17	43
Hostels	46	14	60
Attractions	91	1	92
Golf clubs	18	19	37
Total	**949**	**76**	**1,025**

Interviews for Contextual Background

10.11 In a separate exercise, we conducted ten in-depth telephone interviews with senior executives in key organisations. The purpose of these interviews was to provide a contextual background to the quantitative findings, and this is given in section 2 before the findings to the main quantitative survey. The key organisations interviewed were:

- Incoming Tour Operators Association
- Bed & Breakfast Ireland
- Irish Boat Rental Association
- Restaurants Association of Ireland
- Irish Hotels Federation
- Aer Lingus

- Irish Ferries
- Coach Tourism and Transport Council
- Irish Caravan and Camping Council
- Car Rental Council

Appendix 2 – Copy of Questionnaire

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

Hotel ..... ❑
Guesthouse ..... ❑
Bed & Breakfast ..... ❑
Self catering ..... ❑
Caravan / campsite ..... ❑
Hostel ..... ❑
Attraction ..... ❑
Golf club ..... ❑

(ACCOMMODATION) Please note that the following questions refer to your accommodation business only

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

Q1 Has your business been established since before the start of 2010?

Yes ..... ❑ Go to Q2
No ..... ❑ Go to Q12

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

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

Q3 How does the volume of your overall business to date this year compare with the same period last year from each of the following markets? (N.B. *If you never receive visitors from a particular market on the list then please tick 'not applicable'*)

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

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

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

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

Q6 **(HOTELS) How does your average room yield to date this year compare with the same period last year?**

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

Q7 **(HOTELS) Thinking about your Ireland market business to date this year, how have each of the following performed compared with the same period last year?**

	Up significantly	*Up slightly*	*Same*	*Down slightly*	*Down significantly*	*Don't know*	*Not applicable*
Weekend breaks	❑	❑	❑	❑	❑	❑	❑
Mid-week breaks	❑	❑	❑	❑	❑	❑	❑
General leisure	❑	❑	❑	❑	❑	❑	❑
Business / corporate	❑	❑	❑	❑	❑	❑	❑
Special events	❑	❑	❑	❑	❑	❑	❑

Q8 **How do you expect the volume of your overall business to perform during the remainder of the year compared to the same period last year?**

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

Q9 **How do you expect the volume of your overall business to perform during the remainder of the year compared to the same period last year from each of the following markets?**

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

Q10 **How do you expect the volume of your overseas business to perform during the remainder of the year compared to the same period last year from each of the following markets?**

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

Q11 **Thinking about the number of staff that you currently employ, that is full time, part time and seasonal, are the numbers currently employed up, down or the same for each type of employee compared to this time last year? (N.B. *If you don't currently employ a particular type of employee on the list and didn't this time last year either, please use the 'not applicable' option*)**

	Up on last year	*Same as last year*	*Down on last year*	*Don't know*	*Not applicable*
Full time	❑	❑	❑	❑	❑
Part time	❑	❑	❑	❑	❑
Seasonal	❑	❑	❑	❑	❑

Q12 **What are the main positive factors, if any, affecting your business this year?**

_____

_____

Q13 **What are your main issues of concern, if any, affecting your business this year?**

_____

_____

Please assist us by confirming that we have the correct details for your business. All information that is provided is strictly confidential and any contact details provided by you will only be used by Strategic Marketing in administering the Tourism Barometer over the period 2011 - 2012.

Please check that the following name of establishment is correct. If it is incorrect, please edit in the box below. If it is correct, please leave it as it appears.

Please enter the name and position of the person completing the questionnaire below. Please note, any contact details provided by you will only be used by Strategic Marketing in administering the Tourism Barometer over the period 2011 - 2012.

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.

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