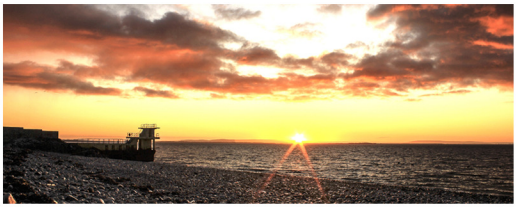
STRATEGIC MARKETING

Fáilte Ireland
National Tourism Development Authority

Tourism Barometer








December 2013

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1. Headline Findings

Background to the Tourism Barometer

The Fáilte Ireland Tourism Barometer is a survey of tourism businesses designed to provide insight into tourism performance for the year to date and prospects for the remainder of the year / for the following year.

We received 486 responses to an online survey with tourism businesses in November and December 2013 and conducted 150 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 (Year to date and prospects for the year ahead)

	2007	2008	2009	2010	2011	2012	2013
Up	45	14	15	28	39	48	68
Same	24	18	11	25	31	26	21
Down	31	68	74	47	30	26	11

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

1.1 The Business Sentiment Index shows that sentiment in the industry has increased significantly this year. Sentiment is now much higher than it was before the start of the financial crisis.

Paid serviced accommodation very much returning to better times

1.2 Most (72%) weighted PSA operators report increased visitor volumes in 2013 and about one in six (17%) report the same level. Only a minority (11%) of PSA businesses have experienced a decrease.

1.3 Visitor volumes are reported to be up in all three PSA sectors – hotels, guesthouses and B&Bs. 2013 is the first year since the start of the financial crisis that visitor volumes have been up on balance in guesthouses and B&Bs as well as hotels.

1.4 The overseas market has performed very well this year, with the majority (64%) of PSA operators experiencing increased visitors, especially from North America.

1.5 Expectations for 2014 are very positive. Almost all (98%) PSA businesses expect the same or increased visitor volumes next year. The most significant positive external factor likely to affect performance is the maintenance of the 9% VAT rate.

A good year for many self-catering operators

1.6 Many self-catering operators have enjoyed a good year. About half (48%) report increased visitors, and about a quarter (26%) report the same level.

1.7 Repeat visitors are particularly important in the self-catering sector – the vast majority (94%) state this as a likely positive factor in 2014.

Attractions have had a busy year

1.8 Attractions have performed strongly this year, with about three in five (59%) reporting increased visitor volumes. 'Own marketing' is the most frequently mentioned likely positive factor on performance in 2014 (76% of respondents).

Restaurants benefiting from tourism trade

1.9 Results from restaurants in areas of good tourist footfall show that the sector is recovering well in terms of tourism trade. Three in five (60%) respondents have had more tourist custom than last year. This is largely due to the strength of the overseas market; most (80%) respondents are up on custom from overseas visitors.

Hostels also performing well

1.10 2013 has also been a successful year for hostels, with about three in five (62%) respondents reporting increased visitors.

Benefits from The Gathering are well spread across the country

1.11 Overall, about one in three (35%) respondents say they have experienced increased business from The Gathering, and some (8%) still expect it.

1.12 Hotels have benefited the most, with three in five (60%) experiencing increased business as a result of The Gathering.

1.13 There are no significant differences among the seven regions of Ireland, indicating that the benefits of The Gathering have been well spread across the country.

2. Qualitative Findings

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

Moving up in 2013

2.1 This year has seen growth for the tourism industry in Ireland. While for some, 2013 started slowly, volumes of business picked up through the year, peaking in the summer months. This year has seen a good degree of optimism following on from the upwards trend.

"This year has been very good for us. Consumer and business trade are both significantly up."

2.2 While the levels of growth vary from modest to significant across the industry, there is a belief that a corner has been turned.

"Overall, it has been a very good year and all members are reporting an increase on 2012"

"Having come off a decent 2012, 2013 wasn't quite as good but we still saw continued growth"

Big boost from North American market

2.3 Last year saw an increase in visitors from the North American market – a trend that has continued strongly this year. Some industry leaders believe that The Gathering has contributed to this.

"We've seen a good impact on numbers from The Gathering, it really seems to have taken hold in the US"

"America was poised for that leap forward in terms of growth and everything seemed to go in Ireland's favour this year in terms of competitiveness"

2.4 Businesses have reported up to 40% growth from North America, along with direct impact from The Gathering. It seems like Ireland has a 'restored reputation' abroad.

"Ireland is back on the bucket list"

2.5 There is also optimism that this US growth will have longevity. Enjoyable trips have seen North Americans express a desire to return to Ireland, along with sharing their positive experience with family and friends in America.

2.6 Germany has also been a strong market this year, while GB has seen slow growth.

The Gathering has been positive for Ireland – this year and in years to come

2.7 Generally, it is believed that The Gathering has had a positive impact on Ireland and the perception of the country – especially in North America.

"It has primarily been a good year because of The Gathering"

2.8 While most find it hard to quantify, there is a belief that The Gathering has brought an increase in bookings – possibly because of the additional flights available – and that it is continuing to raise the profile of Ireland and will continue to do so in the future.

Budget brings relief and optimism

2.9 Maintaining a competitive edge is vital to those in the tourism, and the preservation of the 9% VAT rate announced in the Budget has been welcomed by the industry.

"Keeping the 9% tax is a huge positive in terms of the competitive message going out into the international markets"

"Tourism will recover and survive on the basis of our competitiveness, and the VAT is a big factor in that"

2.10 Similarly, the abolition of the air travel tax is also seen as a positive move which could see increased traffic to Ireland.

"Anything that makes airlines make a decision to increase capacity into Ireland means there is availability of space and growth in Ireland"

Limited impact from good weather on overseas visitors

2.11 The fine weather experienced in the summer months in Ireland is believed not to have impacted on overseas volumes. While the sunshine may have increased the enjoyment of visitors' stay in the country, it does not seem to be a reason for a visit.

"People don't come to Ireland for the weather – it's not one of our USPs. If it's the weather they want, they head south."

Advance bookings on the rise

2.12 Over the past few years, business had seen a rise in the number of last minute bookings, but there seems to already be an increase in the number of visitors planning a visit to Ireland in 2014.

"Advance bookings are ahead of where they were this time next year"

Continued growth predicted for 2014

2.13 After a strong year, the industry is going into 2014 with clear positivity. There is a belief that the tourism industry will continue to grow thanks to the legacy of The Gathering, Ireland's competitiveness – largely thanks to the 9% VAT rate – and economic optimism.

"There is a general feel good factor about our own economy. People are more positive and upbeat although it's still at an early stage."

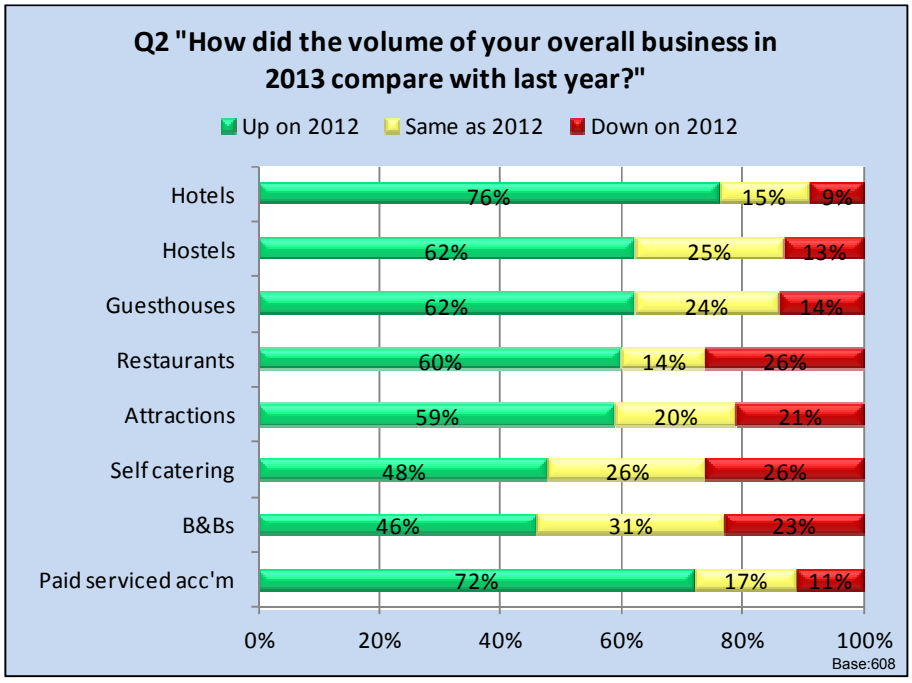
"The Gathering had a major impact and will be difficult to repeat in terms of the wave of inbound tourism"

"I think there will be steady growth back next year as tourism improves"

3. Overall Visitor Volumes in 2013 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 2013



In all charts, 'don't know' or 'not applicable' answers to the question have been excluded and the percentages re-based. Results are split by sector and ordered by proportion answering an increase in numbers (shown in green).

In addition to the individual sector results, the last bar on each chart in this section shows weighted results for the paid serviced accommodation sector; these figures have been derived from the hotel, guesthouse and B&B results, with weightings applied in accordance with each sector's share of total bedrooms within paid serviced accommodation.

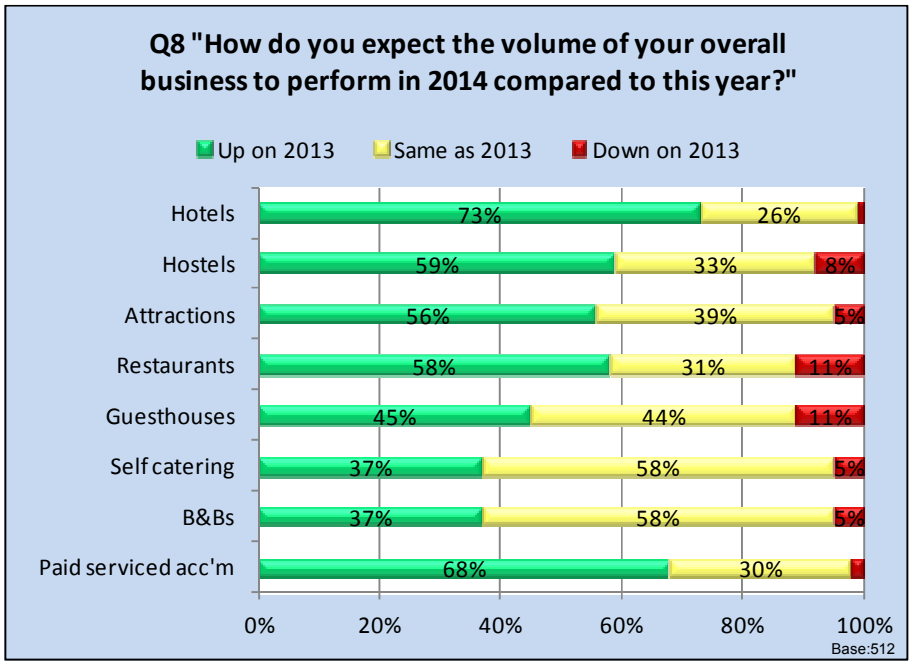
Very positive upturn in 2013

3.1 2013 stands out as the year when the tourism industry has really turned the corner following a very challenging few years. Visitor volumes are significantly up in every sector.

3.2 The fine summer weather, The Gathering, and the general economic upturn have all contributed to an excellent year.

"The general economic environment is improving somewhat. People are more positive in their outlook."
Hotel

Expectations for 2014



The good times look set to continue

3.3 The positive news is that the busy year enjoyed in 2013 looks set to continue in 2014. The vast majority of operators in every sector expect visitor levels in 2014 to be the same or better than in 2013.

"Legacy of the Gathering"
Hotel

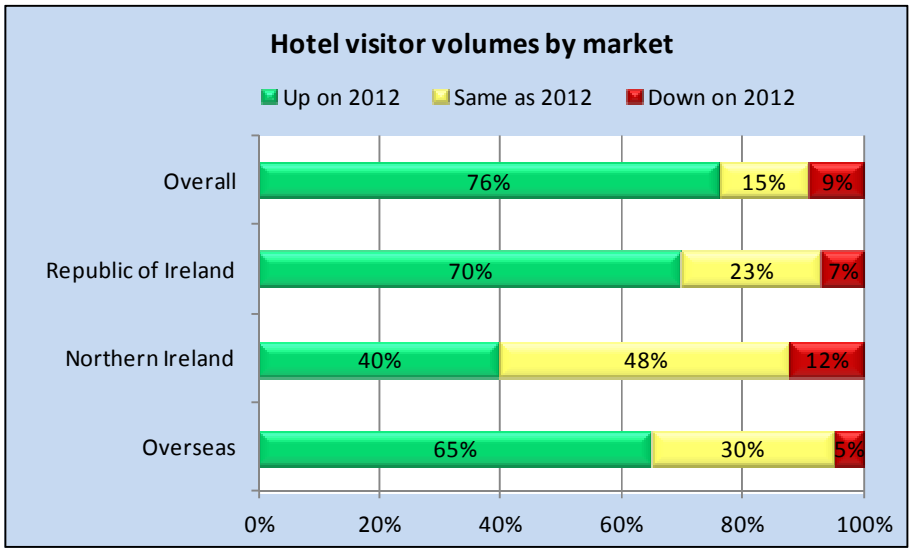
3.4 Maintenance of the 9% VAT rate and the abolition of airport tax are very welcomed by the industry.

"The retention of 9% VAT and the abolition of the airport tax are positive factors"
Hotel

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



Base:110

Domestic and overseas markets both very strong for hotels

4.1 The hotel sector has seen strong visitor volumes in both the domestic and the overseas markets this year. All of the major overseas markets (Britain, France, Germany, North America) have performed well, particularly North America, whereby nearly two in three (63%) operators have seen increased visitors.

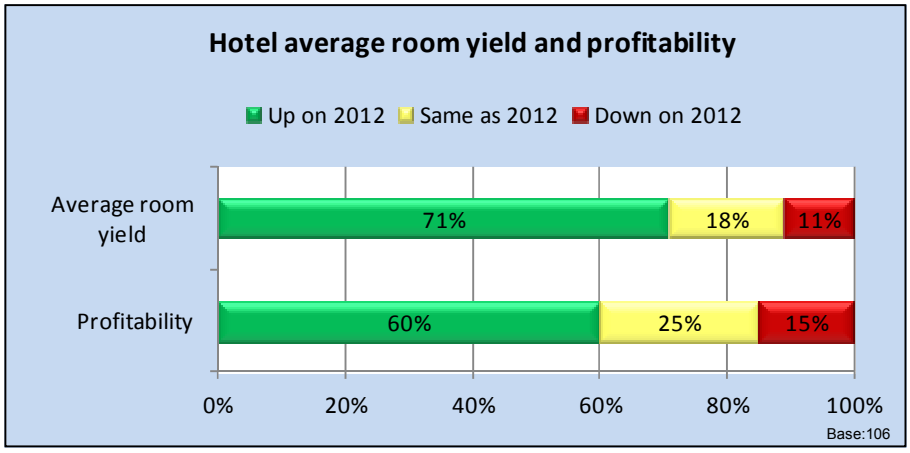
4.2 The hotel sector has benefited the most from The Gathering, and the initiative has been particularly effective in attracting North American visitors to Ireland.

"We've experienced real increase in business from America, Canada and Australia"
Hotel

"Good overall positive image of Ireland internationally"
Hotel

"Germany in particular ... we have seen a large increase in visitors"
Hotel

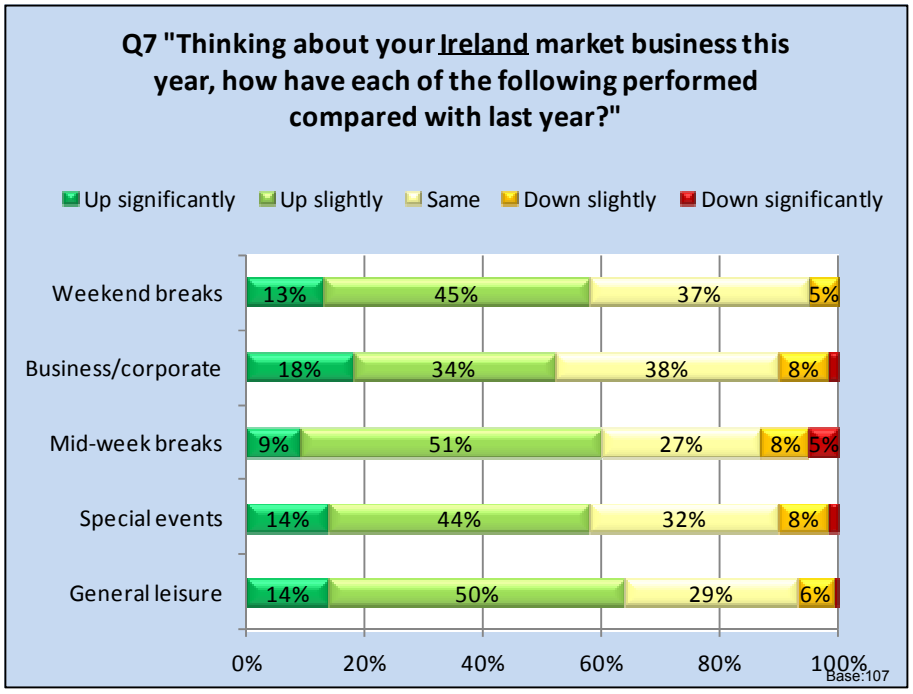
Hotel average room yield and profitability



Much better levels of profitability this year

4.3 Profit levels and average room yields are much healthier this year in the hotel industry than they were last year, when many operators were able to increase or maintain visitor volumes but not necessarily profitability.

Hotel visitor types (Ireland market)

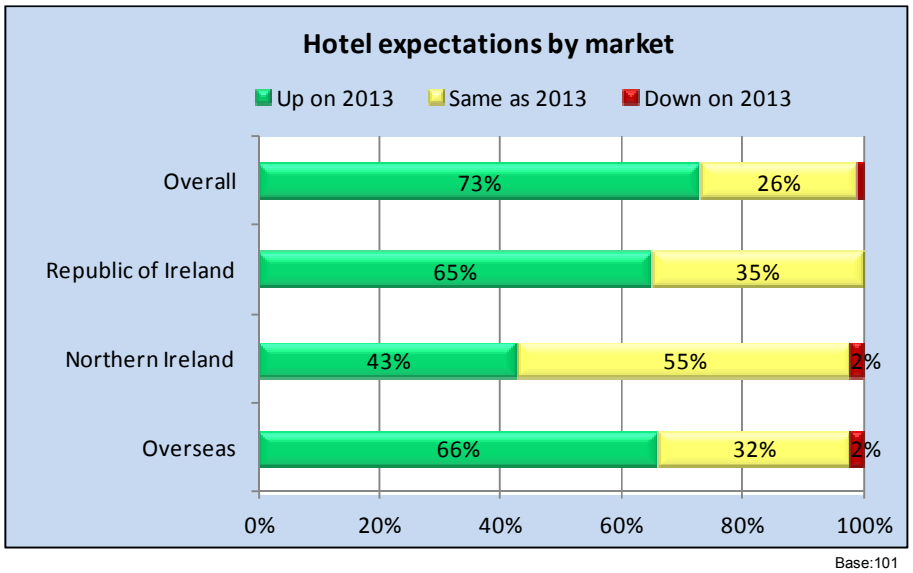


Strong performance of hotels reflected across all market types

4.4 All visitor types in the domestic market have contributed to the success of hotels this year. General leisure visitors have performed very strongly, with the majority (64%) of hotels reporting this visitor type to be up, and only a small minority (7%) reporting them to be down.

4.5 The business/corporate market was hit quite hard in the financial crisis, but it has shown promising signs of recovery this year, with around one in five (18%) hotels reporting it is up 'significantly'.

Hotel expectations



Better times are here to stay – maintenance of the 9% VAT rate is significant

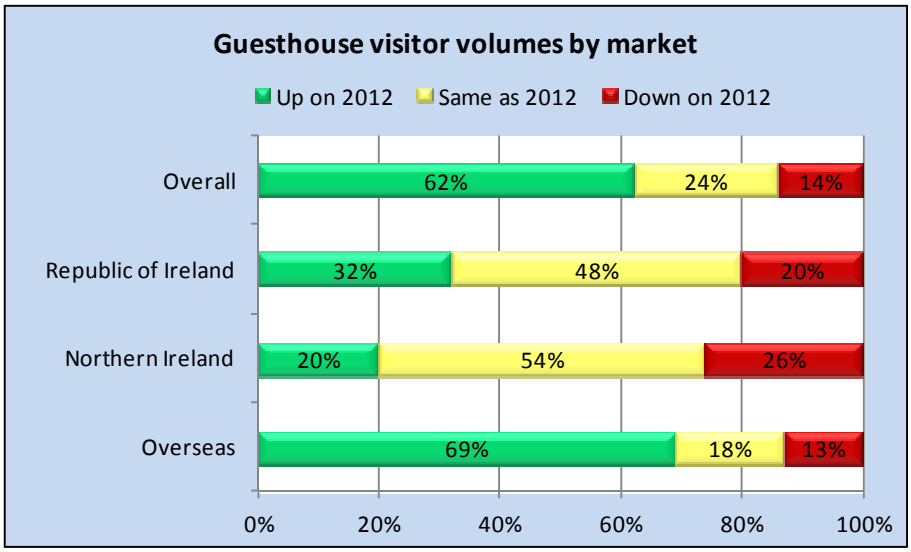
4.6 The buoyant year is not a one-off; the positive upturn in visitor numbers is expected to carry through 2014. There are high expectations for both the domestic and overseas markets, especially the North American market, where many (57%) operators expect to see increased visitors in 2014 on top of a very good 2013.

4.7 Maintenance of the 9% VAT is highly significant in the hotel sector. The vast majority (96%) of operators state this as a likely positive factor in 2014.

"As long as there is continuity on a macro level, business coming down to a grass roots level should slowly continue to increase"
Hotel

5. Guesthouses

Guesthouse visitor volumes year to date



Base:91

Significant upturn for guesthouses in 2013

5.1 Visitor volumes are reported to be up by a high number of guesthouse operators in 2013 following a difficult few years in the financial crisis. The majority (62%) of respondents have experienced increased visitors in 2013.

5.2 The strength of guesthouse performance in 2013 appears to be due to the upturn in overseas visitors. The North American and German markets have been particularly strong, with many operators (62%) reporting increased North American visitors, and a similar proportion (57%) experiencing increased German visitors.

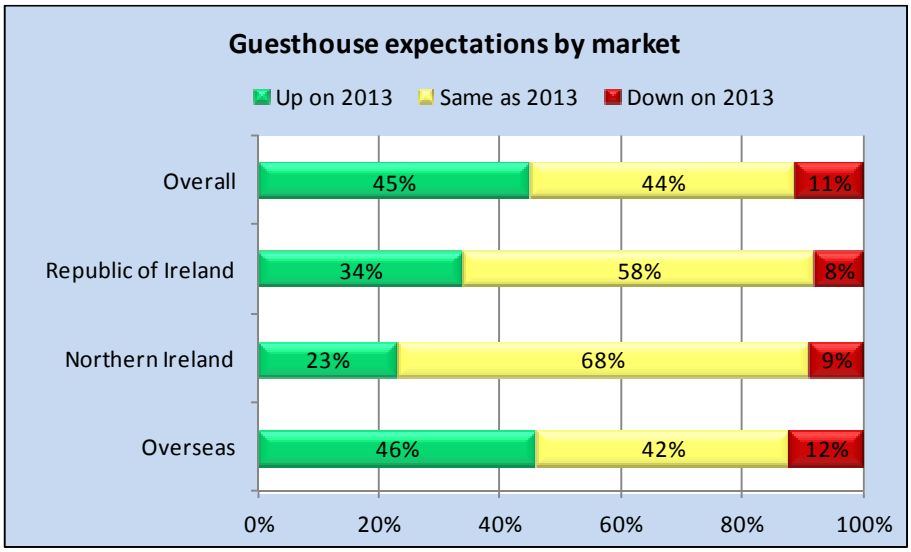
5.3 Profitability is also returning to the sector, with about half (47%) of operators seeing an increase on last year, and about a third (35%) experiencing the same level.

5.4 Various reasons have been given for a successful year, including signing up with online booking agents and improved overseas access to Ireland.

"Third party booking agents – booking.com and Expedia – have greatly assisted with business"
Guesthouse

"Our business from Australia, New Zealand and Canada has increased two-fold, year on year for the last two years" - Guesthouse

Guesthouse expectations



Base:76

Strong expectations for 2014

5.5 Following a much better year in 2013 than previous years, the outlook for the guesthouse sector is now much more upbeat. A favourable Budget from many operators' point of view is a key factor in 2014, especially in regard to the 9% VAT rate and the abolition of airport tax.

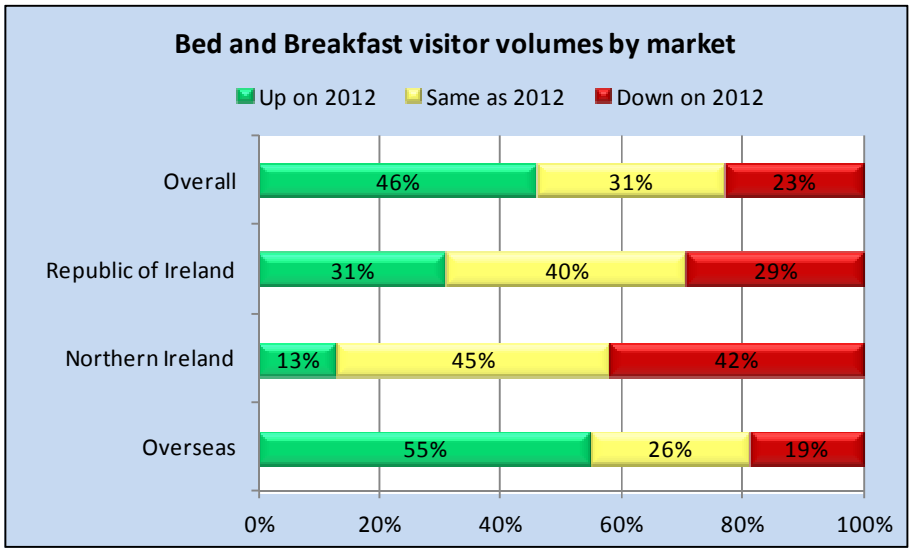
"Abolition of the airport tax together with improved services into Shannon from Europe and the maintaining of the 9% VAT should have positive implications for the coming year"
Guesthouse

5.6 The overseas market has been the foundation of a strong 2013 for the guesthouse sector, and this is expected to be the case again in 2014, with nearly half (46%) of operators expecting increased overseas visitors and a similar proportion (42%) expecting the same level.

"We hope to have Russian sailors from St Petersburg here for four weeks learning to sail and learning English"
Guesthouse

6. B&Bs

B&B visitor volumes year to date



Base:208

B&B sector has turned the corner

6.1 The B&B sector has endured the most difficult period of any sector during the financial crisis, but times appear to be changing. Nearly half (46%) of B&B operators report increased visitors in 2013.

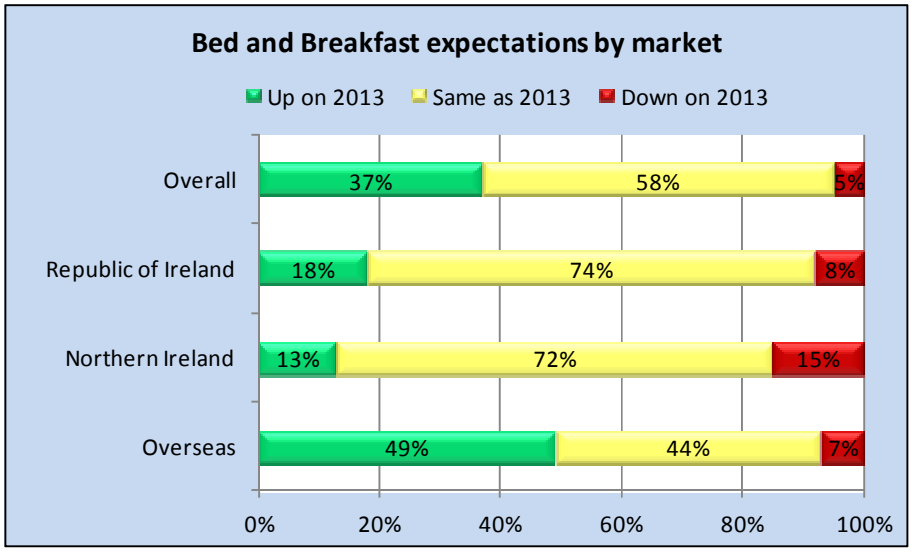
6.2 As with many other sectors, it is the strength of overseas business which has under-pinned the recovery in 2013. North American visitors have been coming in large volumes – nearly half (45%) of operators report this market being up. The German market has also picked up this year, with two in five (41%) operators seeing increased German visitors.

"The 'Gathering' is a great marketing word for Ireland"
B&B

6.3 Profitability is still a significant issue for many in the B&B sector in spite of increased visitor volumes, with rising operating costs and low-priced competition putting margins under pressure. Approximately a third (36%) of B&B operators have increased their profitability this year, and a quarter (26%) have experienced the same level. However, about two in five (38%) have had a decrease.

"Increased costs eating into profitability"
B&B

B&B expectations



Base:155

Bright outlook for 2014

6.4 In the previous research wave (September), expectations in the B&B sector were cautious, but the sentiment is very different now. Nearly all (95%) operators expect to have the same or increased visitors next year. The overseas market is key to these expectations, especially North America.

"I am very optimistic. I give good value, offer high class accommodation and look after our guests. I aim to send them away happy and with great memories."
B&B

Profit margins to remain under pressure however

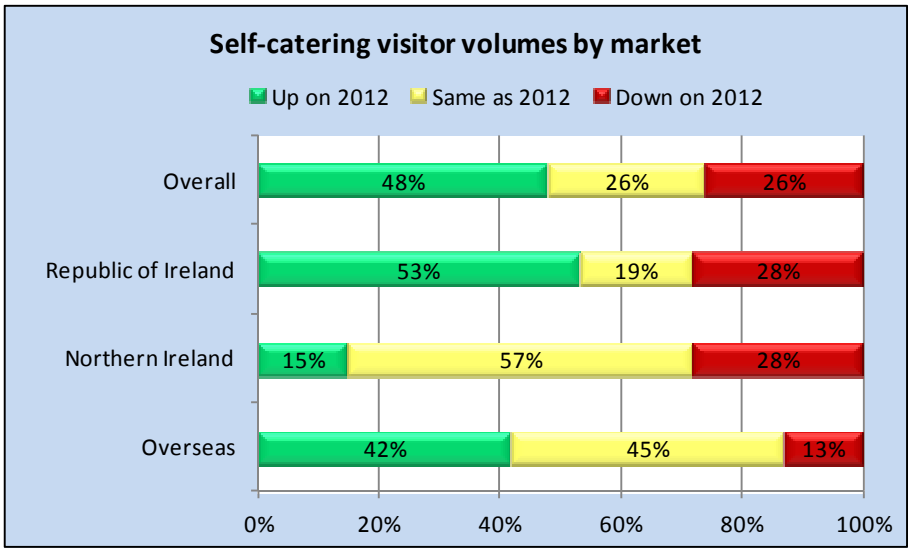
6.5 The pressure on profit margins is still a lingering concern in this sector. The majority (70%) are concerned about fuel and energy costs in 2014.

"Increasing costs not being compensated by increase prices"
B&B

"All the extra costs and everything increasing"
B&B

7. Self-catering

Self-catering visitor volumes year to date



Base:50

A good year on the whole for self-catering

7.1 About half (48%) of self-catering operators have experienced increased visitors in 2013. However, about a quarter (26%) have had a decrease, which is the largest proportion reporting a decrease of any accommodation sector.

7.2 The domestic market has performed particularly well for self-catering this year, which is in contrast to the smaller serviced accommodation sectors, which have seen more buoyancy in overseas markets. The weather is thought to have been a major factor in encouraging domestic tourism this year.

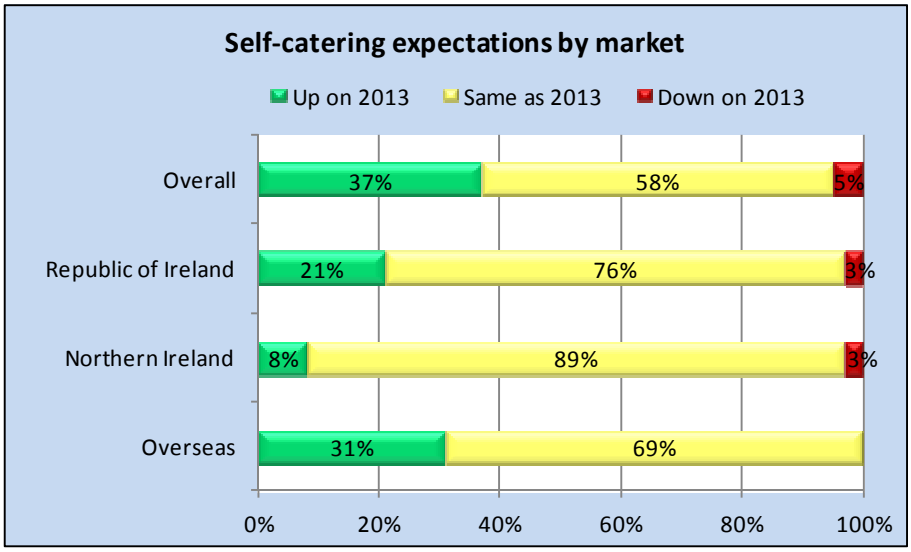
"The weather is a massive factor"
Self-catering

Profitability is under pressure however

7.3 Over two in five (43%) self-catering operators report decreased profitability in 2013 – the highest proportion of any accommodation sector. Low-cost competition is having a significant impact of self-catering operators' ability to make a profit.

"Unapproved accommodation operators are a real concern"
Self-catering

Self-catering expectations



Base:43

Repeat visitors should ensure a solid year in 2014

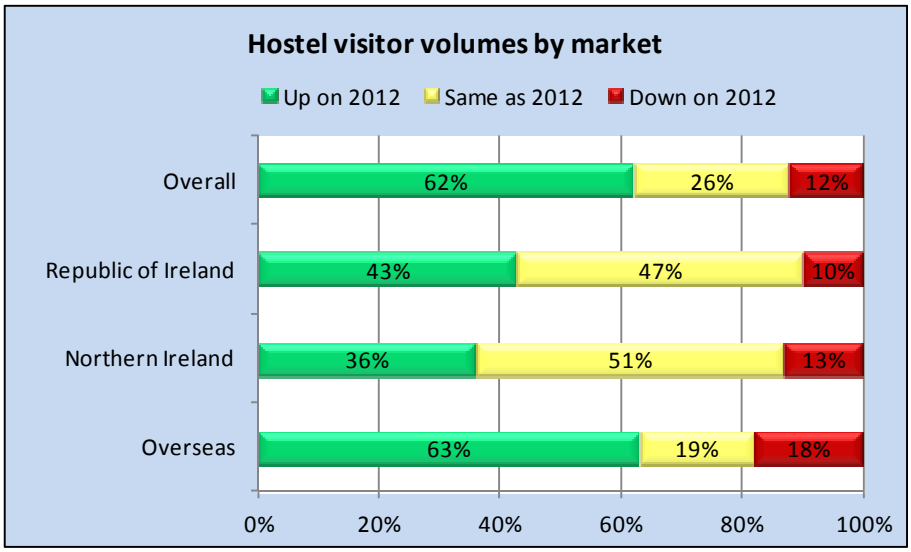
7.4 Repeat visitors are very important in the self-catering sector, as many guests re-book for next year following a good experience. The vast majority (94%) of respondents say that repeat visitors are a likely positive factor in 2014.

7.5 Some expect the fine weather in 2013 to influence many domestic holiday-makers to stay in self-catering accommodation in Ireland again next year.

"After the fine summer in 2013, Irish people will holiday at home"
Self-catering

8. Hostels

Hostel visitor volumes year to date



Base:39

Strong overseas market for hostels

8.1 Hostels have generally had a good year, in particular as a result of a buoyant overseas market, where about two thirds (63%) of operators have seen increased visitors. The French and German markets have performed particularly well. About two in three (63%) operators have had more French visitors than last year, and just over half (53%) have had more German visitors.

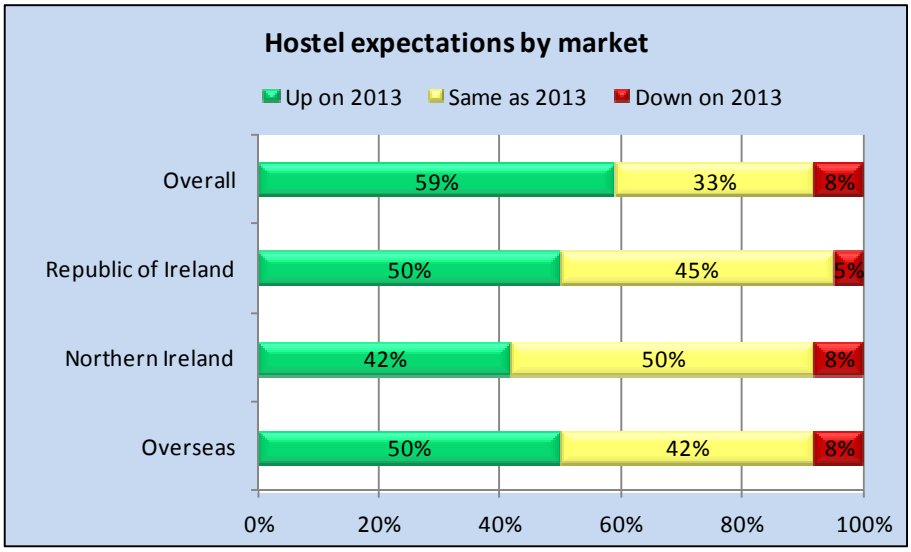
"The Gathering was an inspired idea, even if I was one of its biggest critics. Credit where credit is due."
Hostel

8.2 The domestic market has also performed well, and some comment that the fine weather has played a part in that.

"We had very good weather this year, which is always a factor when you rely on Irish tourists"
Hostel

8.3 Profitability is healthy this year in the hostel sector. Over half (57%) of operators have seen increased profitability this year, and a further 22% have seen the same level.

Hostel expectations



Base:39

2014 looking good across all markets

8.4 The success enjoyed in 2013 looks set to continue through 2014, with three in five (59%) operators expecting increased visitors next year. The French, German and North American markets are all expected to be strong.

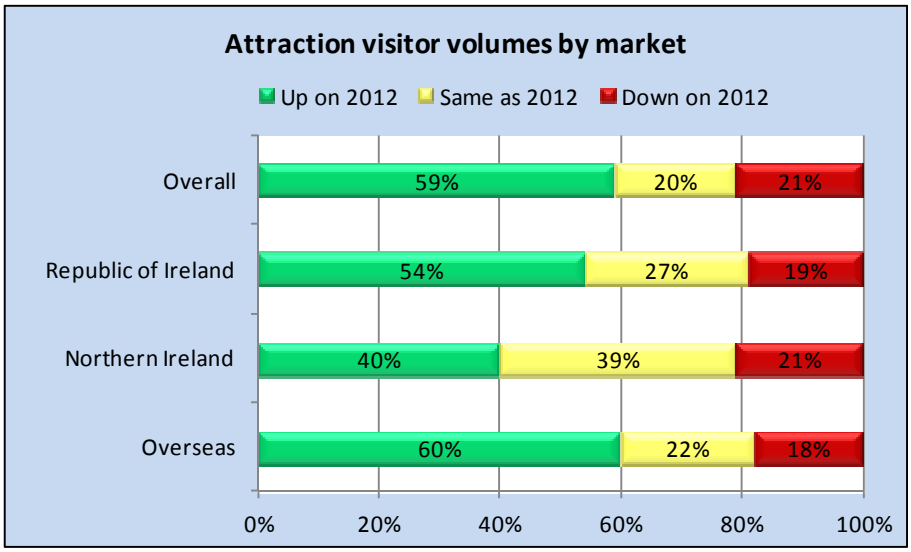
8.5 The most frequently mentioned positive factor behind these expectations for 2014 is 'repeat visitors' (79% of respondents). This is closely followed by 'own marketing' (74% of respondents). Some comment on major plans they have for their marketing next year.

"I intend to actively pursue new Irish and continental markets"
Hostel

"I am going to go online next year so I am hoping for a big improvement"
Hostel

9. Attractions

Attraction visitor volume years to date



Base:68

Excellent weather for many attractions, but not all

9.1 The fine weather in 2013 is felt to be a significant factor behind strong visitor volumes, especially in the domestic market. However, some (indoor) attractions have lost out because of the weather.

"If the weather is good it makes a huge difference"
Attraction

"The sunny summer saw lower visitor numbers to the indoor exhibit"
Attraction

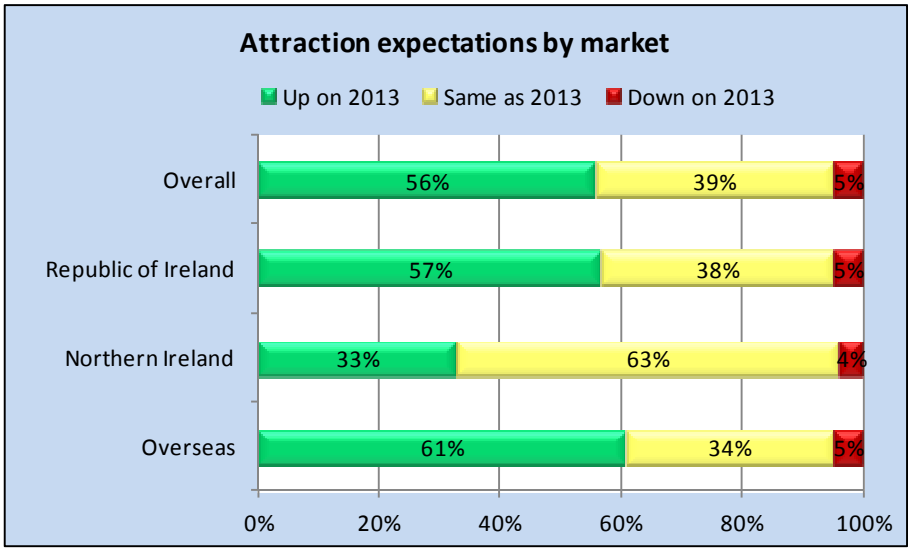
Some issues over profitability in the attractions sector

9.2 Two in five (40%) attractions have increased their profitability this year. A third (32%) have maintained the same level but some (27%) have seen a decrease. It seems that increased visitor volumes do not always translate into increased profit, and some operators comment on significant cost pressures.

"We rely on volunteers to operate and there are fewer available"
Attraction

"Rates are a major concern for small businesses"
Attraction

Attraction expectations



Base:64

Expectations for a solid year in 2014

9.3 The attractions sector is one of the most optimistic sectors about next year. The vast majority (95%) of operators expect more or the same level of visitors, and only a small minority (5%) expect to be down. The positivity applies to all major markets.

9.4 The most frequently mentioned positive factor for next year is 'own marketing' (76% of respondents) and this is also reflected in the comments, both in terms of promotion and product development.

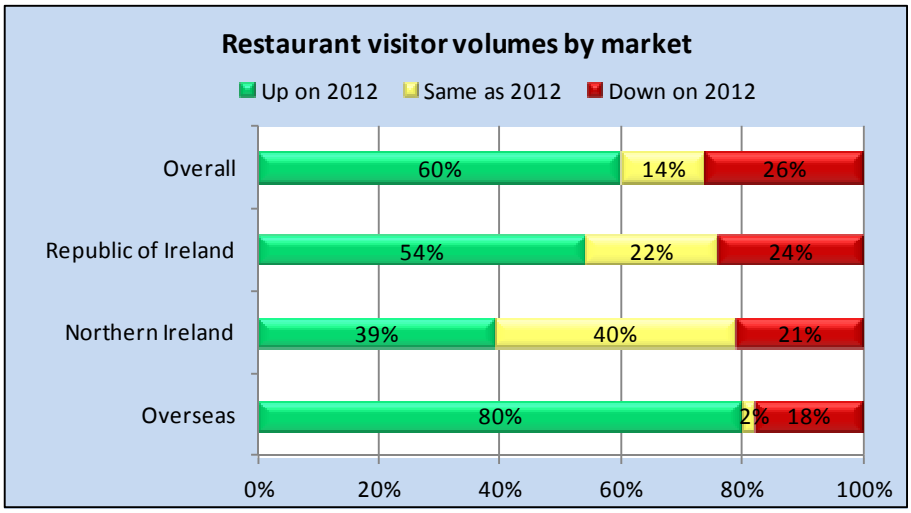
"Our exhibitions will be our biggest positive factor next year"
Attraction

"We are hoping to launch a new website next year"
Attraction

"We have a new exhibition ... and we hope this will attract a lot of new business for us"
Attraction

10. Restaurants

Restaurant visitor volumes year to date



Base:42

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

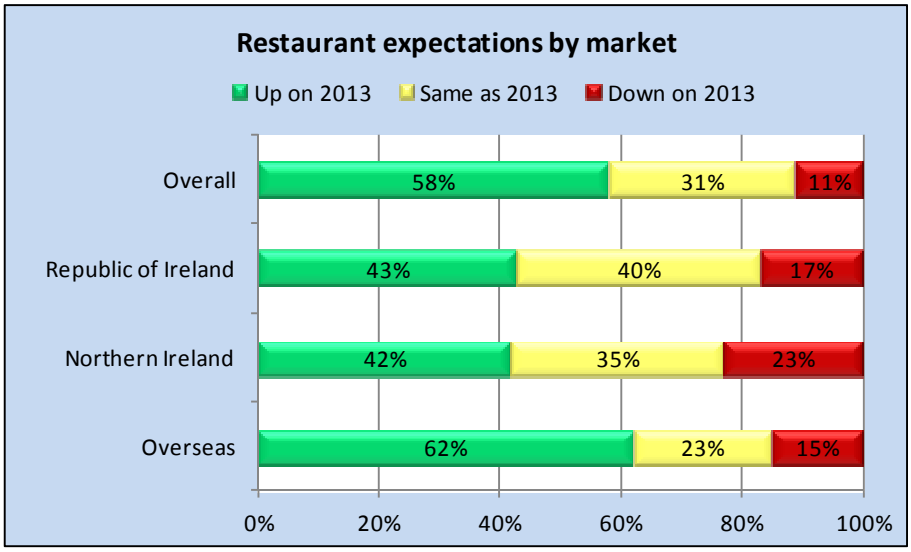
Significant increase in overseas tourist footfall in restaurants

10.1 Restaurants based in areas of high tourism footfall have seen a significant increase in customers from overseas this year. This follows a period of a number of years during the financial crisis when the restaurant sector was hit particularly hard.

"European tourism seems to be better than in 2012"
Restaurant

10.2 Profitability is also up, although not in line with customer volumes, indicating that the average customer appears still to be spending less. Around two in five (43%) respondents say that profitability is up on last year, about a third (36%) report a decrease and one in five (21%) have seen a decrease.

Restaurant expectations



Base:36

Positive outlook for 2014

10.3 The outlook for 2014 in the restaurant sector is positive, with well over half (58%) of respondents expecting increased customers next year.

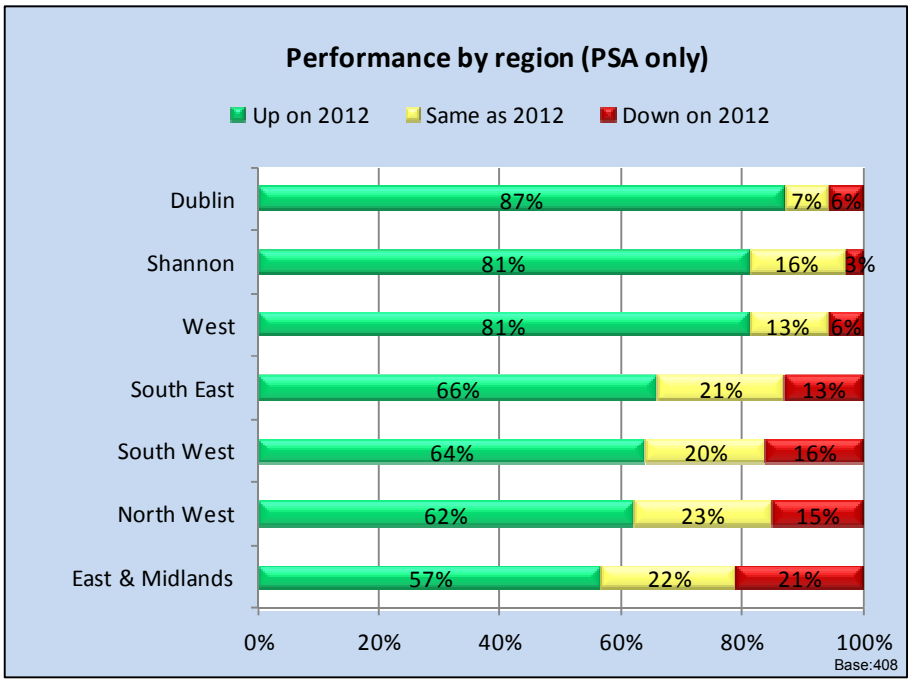
VAT is a significant issue in the restaurant sector

10.4 The retention of the 9% VAT rate is particularly significant to the restaurant sector, and the recent news in the Budget has been welcomed. It helps restaurants to charge reasonable prices at a time when customers have lower disposable income. Almost all (93%) respondents say that the VAT rate is a positive factor for 2014.

"Retention of the reduced 9% VAT on services is imperative for our industry"
Restaurant

11. Performance by Region

Here we discuss the performance by region for the PSA sector



Very strong performance in Dublin

11.1 All regions of Ireland have fared well this year; the PSA sector in Dublin has fared especially well, with the vast majority (87%) of weighted PSA operators reporting increased visitors. The large volume of overseas visitors coming to the city this year is a significant factor.

"There has been a huge increase in visitors from Italy and Spain"
B&B, Dublin

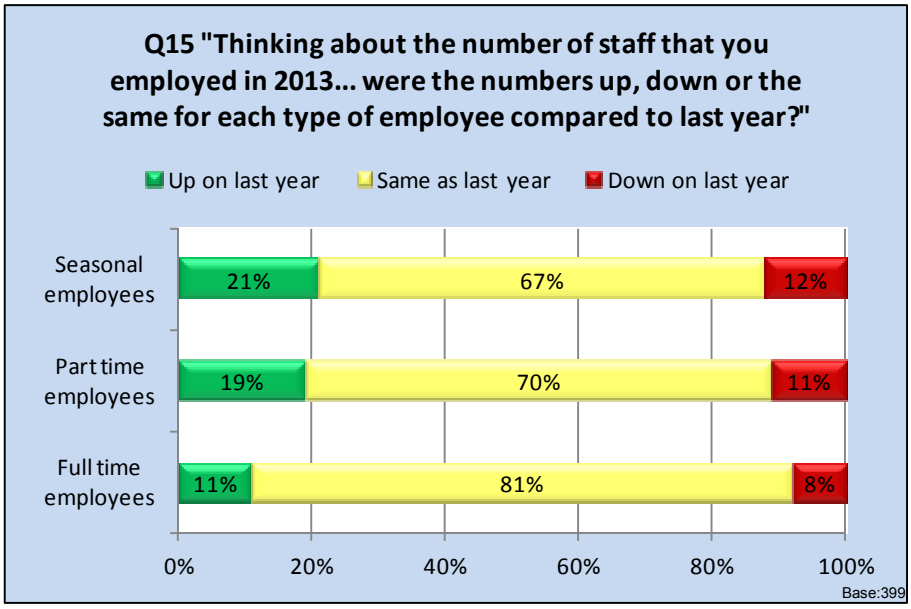
Improved access through Shannon airport

11.2 Shannon and the West have also performed very strongly this year, with the vast majority (81%) of weighted PSA operators reporting increased visitors. Comments suggest that the increase in flights through Shannon airport has had a significant impact on business this year.

"Extra flights into Shannon"
B&B, Shannon

12. Employment in 2013

Employment levels by staff type

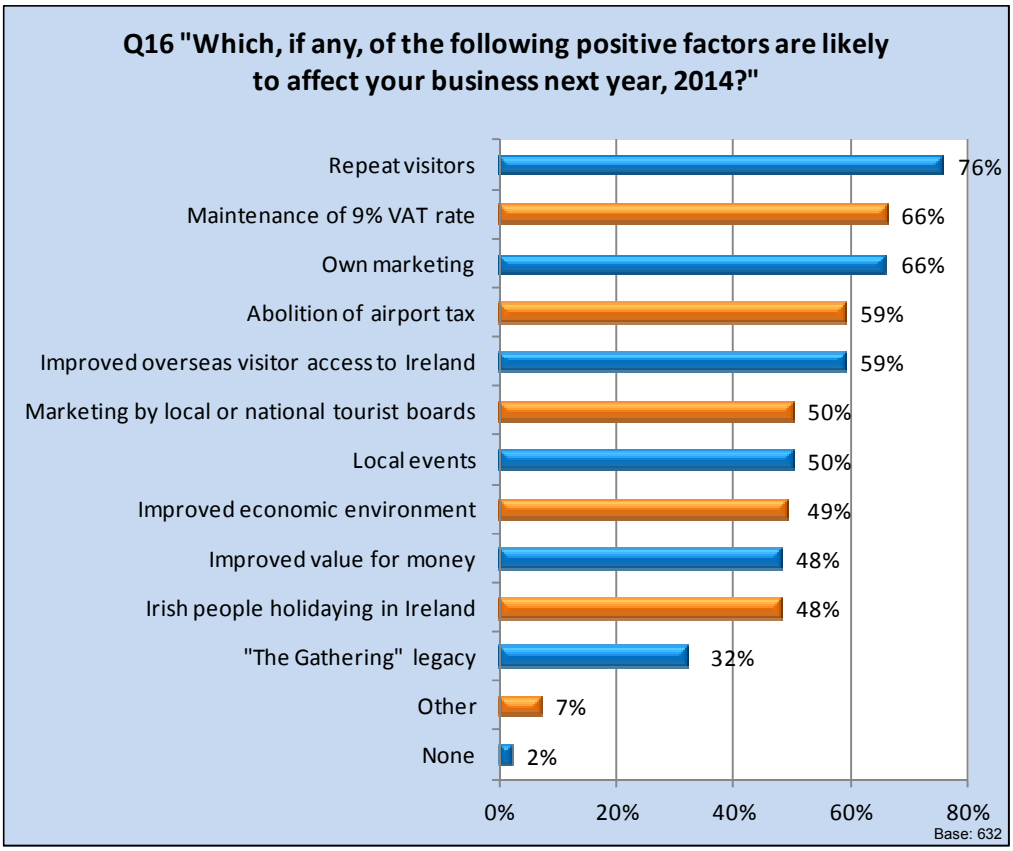


Businesses which do not employ anyone other than the proprietors are excluded from the above

Employment levels showing signs of improvement

12.1 For a number of years during the financial crisis, employment levels in the tourism industry came under pressure. 2013 is the first year for some time when employment levels appear to be on the way up again.

13. Positive Factors in 2014



Repeat visitors especially important in self-catering

13.1 'Repeat visitors' is the most frequently mentioned (76% of respondents) positive factor for 2014. It appears to be particularly important in self-catering, whereby nearly all (94%) have given this as a factor. Self-catering attracts a high level of bookings made well in advance, and so some of these operators probably already know they are in for a good year.

9% VAT rate retention very much welcomed

13.2 Before the Budget there was quite a lot of uncertainty in the industry about the future because operators did not know whether the 9% VAT rate would be maintained. The news has been welcomed very much by the industry. It is particularly significant to hotels (96% of respondents stating it as a positive factor for next year) and restaurants (93%).

"The 9% VAT is actually keeping us in business"
Guesthouse

"A lot of people I have spoken to have said that the 9% VAT rate has been a saviour for so many businesses"
Guesthouse

13.3 It is less of an issue for B&Bs (42% of respondents). This may be because some operators are below the VAT threshold and so do not have to charge VAT on their services.

Abolition of airport tax also welcomed

13.4 The abolition of airport tax has also been very much welcomed by the industry.

"We are an island depending on millions of tourists"
Restaurant

Overseas visitor access looks set to improve again

13.5 New routes into Ireland's airports are planned next year, bringing expectations of increased tourist volumes.

"Ryanair's increase of routes into Ireland"
Guesthouse

"Increased flights into Shannon airport"
B&B

Economy on the way up again

13.6 About half (49%) of respondents say that the improved economic environment is a positive factor for 2014. There is a real sense of the industry seeing better times ahead.

"The general economic environment is improving somewhat. People are more positive in their outlook."
Hotel

The Gathering has been successful, and some expect a positive legacy

13.7 About a third (35%) of businesses have seen an increase in business in 2013 due to The Gathering, and a further 8% still expect to see increased business.

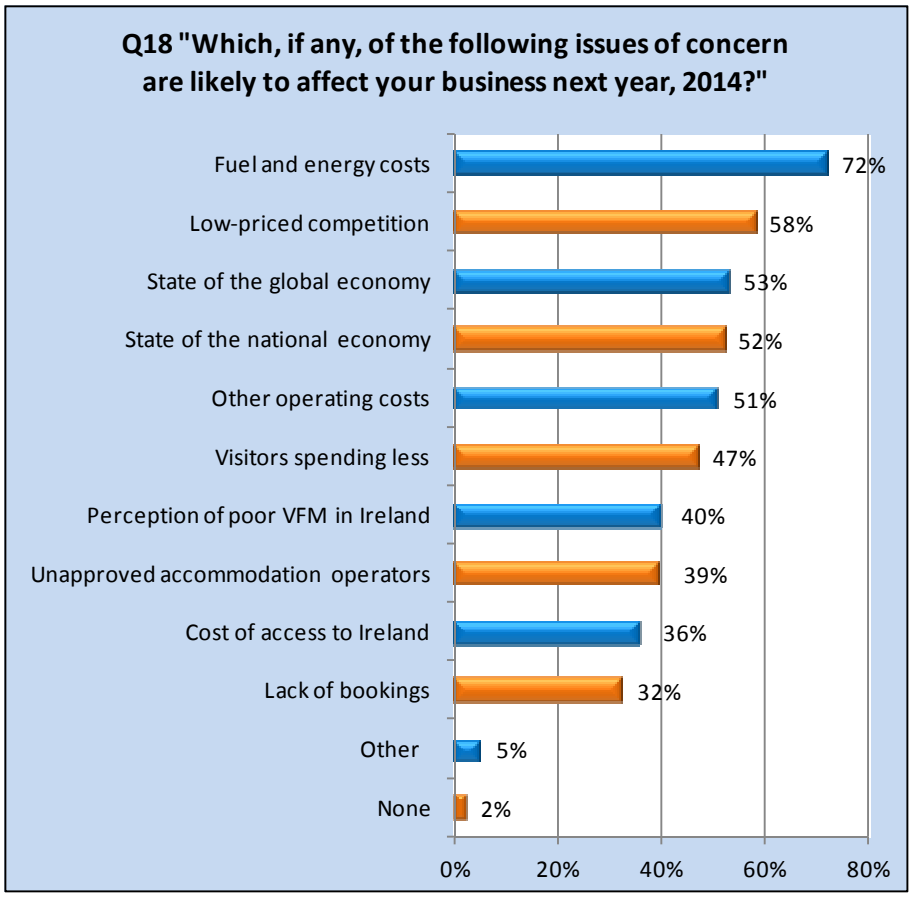
13.8 Hotels and restaurants appear to have benefited the most from the initiative. Three in five (60%) hotels say they have seen increased business, and about two in five (43%) restaurants say the same.

"The Gathering was a huge success and a direct impact on our 2013 sales. Lots of Canadians this year and lots of Irish having small gatherings in Galway. Business couldn't be better thank you."
Restaurant

13.9 The benefits of The Gathering have been well spread across the country, as differences by region are not significant.

13.10 A third (32%) of respondents now expect The Gathering legacy to be a positive factor in 2014.

14. Issues of Concern in 2014



Base: 630

Fuel and energy costs – the concern is not going away

14.1 The Irish tourism industry has had an excellent year, but some key concerns are not going away. The most significant one is fuel and energy costs. This is a key concern in every sector.

"Energy costs are extremely high and it is difficult to keep areas heated"
Hotel

"Fuel and energy costs have a massive impact on us. They are so high."
Hotel

Concerns over the economy are steadily reducing

14.2 About half (52%) of operators still have concerns over the state of the national economy, but this proportion has come down from 63% in September.

14.3 Comments would generally suggest that concerns over the economy are more related to the cost of running a business in the current economic conditions rather than visitors not having enough money to spend on leisure.

"The overall cost of running the business is very high compared to the economy"
Hotel

"The huge increase of all costs related to running any business and the lack of scope to increase rates"
Guesthouse

15. Appendix 1 – Background and Methodology

Background and Objectives

15.1 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.

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

15.3 Fieldwork for this third wave in 2013 took place between 18th November and 6th December. The objectives were to measure:

- Business performance in 2013 in terms of visitor volume – overall and by key markets – and profitability
- Average room yield (hotels)
- Employment levels in 2013
- Visitor volume expectations for 2014
- Positive factors and issues of concern affecting business

Methodology

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

15.5 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.

15.6 Fáilte Ireland provided a database of 3,006 usable contacts (i.e. not opted out) for the survey spread across seven industry sectors (discussed under 'sampling' below). An email was sent to all contacts on the database containing a link to the online survey and an explanation of the survey objectives. Two subsequent reminder emails were sent to non-responders.

15.7 A total of 486 responses were received to the online survey – a response rate of 16%.

15.8 Following this, we conducted 150 '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

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

Sector	Online responses	Telephone top-ups	Total sample size
Hotels	75	40	115
Guesthouses	43	49	92
Bed & Breakfast	220	-	220
Self-catering	21	29	50
Hostels	26	17	43
Attractions	57	15	72
Restaurants	44	-	44
Total	**486**	**150**	**636**

Interviews for Contextual Background

15.10 In a separate exercise, we conducted eight qualitative telephone interviews with senior executives in key organisations. The purpose of these interviews was to provide a contextual background to the quantitative findings, and this is given in section 2 before the findings to the main quantitative survey.

Appendix 2 – Copy of Questionnaire

Tourism Barometer – November 2013

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

Hotel ..... ❑
Guesthouse ..... ❑
Bed & Breakfast ..... ❑
Self catering ..... ❑
Hostel ..... ❑
Attraction ..... ❑
Restaurant ..... ❑

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

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

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

Yes ..... ❑ Go to Q2
No ..... ❑ Go to Q11

Q2 How did the volume of your overall business in 2013 compare with last year?

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

Q3 How did the volume of your overall business in 2013 compare with 2012 from each of the following markets? (N.B. *If you never receive visitors from a particular market on the list then please tick 'not applicable'*)

	Up on 2012	*Same as 2012*	*Down on 2012*	*Don't know*	*Not applicable*
Republic of Ireland	❑	❑	❑	❑	❑
Northern Ireland	❑	❑	❑	❑	❑
Overseas	❑	❑	❑	❑	❑

Q4 Looking at your overseas business in more detail, how did the volume of your business in 2013 compare with last year from each of the following markets? (N.B. *If you never receive visitors from a particular market on the list then please tick 'not applicable'*)

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

Q5 How did your overall profitability this year compare with last year?

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

Q6 (HOTELS) How did your average room yield in 2013 compare with last year?

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

Q7 **(HOTELS) Thinking about your Ireland market business this year, how have each of the following performed compared with 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 in 2014 compared to this year?**

Up on 2013 ..... ❑
Same as 2013 ..... ❑
Down on 2013 ..... ❑
Don't know ..... ❑

Q9 **How do you expect the volume of your overall business to perform in 2014 compared to 2013 from each of the following markets?**

	Up on 2013	*Same as 2013*	*Down on 2013*	*Don't know*	*Not applicable*
Republic of Ireland	❑	❑	❑	❑	❑
Northern Ireland	❑	❑	❑	❑	❑
Overseas	❑	❑	❑	❑	❑

Q10 **How do you expect the volume of your overseas business to perform in 2014 compared to this year from each of the following markets?**

	Up on 2013	*Same as 2013*	*Down on 2013*	*Don't know*	*Not applicable*
Great Britain	❑	❑	❑	❑	❑
France	❑	❑	❑	❑	❑
Germany	❑	❑	❑	❑	❑
North America	❑	❑	❑	❑	❑

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

Yes ..... ❑
No ..... ❑

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

Yes ..... ❑
No ..... ❑

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

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

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

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

Q15 **Thinking about the number of staff that you employed in 2013, that is full time, part time and seasonal, were the numbers up, down or the same for each type of employee compared to last year? (N.B. *If you didn't currently employ a particular type of employee on the list and didn't 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 employees	❑	❑	❑	❑	❑
Part time employees	❑	❑	❑	❑	❑
Seasonal employees	❑	❑	❑	❑	❑

Q16 **Which, if any, of the following <u>positive</u> factors are likely to affect your business next year, 2014? (TICK ALL THAT APPLY)**

Own marketing ..... ❑
Marketing by local or national tourist boards..... ❑
Improved overseas visitor access to Ireland..... ❑
Local events..... ❑
Repeat visitors..... ❑
Irish people holidaying in Ireland..... ❑
"The Gathering" legacy..... ❑
Maintenance of 9% VAT rate ..... ❑
Abolition of airport tax..... ❑
Improved value for money..... ❑
Improved economic environment ..... ❑
Other ..... ❑
None ..... ❑

Are there any other <u>positive</u> factors likely to affect your business in 2014 which you would like to comment on?

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Q18 **Which, if any, of the following <u>issues of concern</u> are likely to affect your business next year, 2014? (TICK ALL THAT APPLY)**

State of the national economy..... ❑
State of the global economy ..... ❑
Perception of poor value for money in Ireland..... ❑
Low-priced competition..... ❑
Fuel and energy costs ..... ❑
Other operating costs (besides fuel and energy) . ❑
Lack of bookings ..... ❑
Visitors spending less..... ❑
Cost of access to Ireland..... ❑
Unapproved accommodation operators..... ❑
Other ..... ❑
None ..... ❑

Are there any other <u>issues of concern</u> likely to affect your business in 2014 which you would like to comment on?

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_____

If you would like future surveys to be sent to an email address different from the one we used this time, please state the new email address below. Otherwise please leave the box blank. All information that is provided is strictly confidential and any contact details provided by you will only be used in administering the Tourism Barometer over the period 2013 - 2014.

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