

Tourism Barometer

Strategic Research and Insight

September 2022



Executive Summary (1)

Good summer performance compared to 2021

- As Covid restrictions lifted and international travel resumed as we entered the summer months, the majority (62%) of businesses report an upturn in visitors compared to summer 2021, 15% report no change and only 23% saw a downturn.
- Businesses which depend more on inbound tourism are most likely to be up, for example, tour/coach operators and DMCs (91%) and businesses located in Dublin (86%).
- However, some operators are quick to point out that this doesn't mean their business is doing well financially

Accommodation is up on 2019, but non-accommodation sectors remain down

- 45% of accommodation operators welcomed more guests so far this year compared to pre-Covid norms; 29% have had fewer.
- 30% of non-accommodation operators report that business is up year to date vs 2019, however, the majority, 57%, are down
- The domestic market continues to perform strongly for some sectors, especially for caravan & campsites, where 65% record more domestic guests year to date vs pre-Covid.
- Similarly, 63% of hotels report an increase in domestic guests compared to pre-Covid times. For hotels, the domestic market has performed particularly well for short breaks rather than long stays

Executive Summary (2)

Overseas tourism re-emerging, though not back at pre-Covid levels

- After a long absence due to Covid, operators are happy to see overseas tourists again – 63% cite this as a reason to be positive this year; Americans are being noticed in particular.
- However, all major overseas markets, including North America, have not yet caught up with pre-Covid volumes.
- 35% of businesses have had more overseas visitors year to date compared to pre-Covid, 49% are down.
- B&Bs go against the trend, having enjoyed increased volumes from France and Germany.

Rising costs now dominate concerns

- Covid has been replaced as a key concern by more topical issues
- The top four concerns for businesses relate to rising costs: energy (82% are concerned), other operating costs (76%), cost of car hire (53%), and people lacking disposable income (49%)
- Operators now face the challenge of rising costs, whilst many consumers face reduced spending power

Executive Summary (3)

Sustainability measures

- 78% of businesses have measures in place to manage their waste sustainably
- 65% have measures to manage energy consumption sustainably, and 61% for water usage
- For each of the three types of measure, roughly a third of those with no current plan intend to introduce measures in the next 12 months
- The two most common reasons for not intending to introduce plans to manage one or more area sustainably are:
 - Business is very small, so not relevant
 - Don't know where to start

Performance



02/09/22 | Tourism Barometer

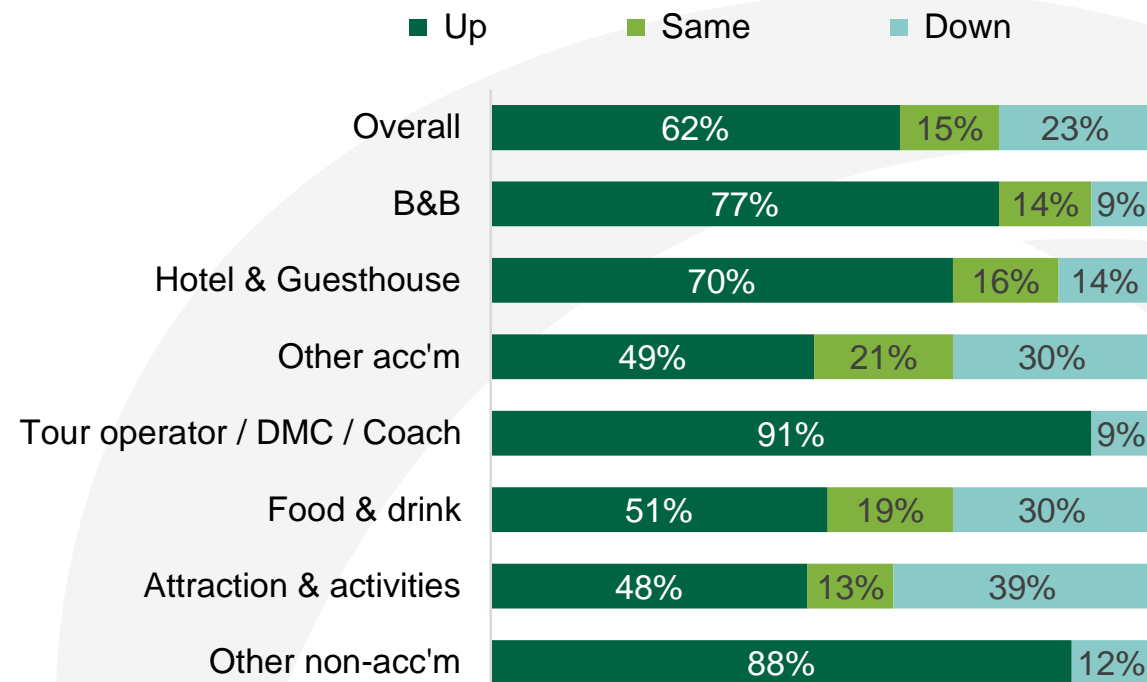
Performance vs Last Summer

Volumes well up on last summer

- Sectors and regions dependent on inbound tourism are particularly likely to be up on last summer, when international travel was more restricted:
 - 91% of tour / coach operators & DMCs are up
 - 86% of Dublin businesses are up
- Serviced accommodation volumes have increased more than non-serviced
- The apparent buoyancy of the B&B sector however needs to be viewed in context that some B&Bs have closed permanently or have not yet reopened since Covid, as reported in the accommodation occupancy survey

"As there are fewer B&Bs, our business is very busy"
B&B, Mayo

Q4 "How does the volume of your overall business this summer compare to last summer (2021)?"



Base: 529

'Don't know' and 'not applicable' answers have been excluded

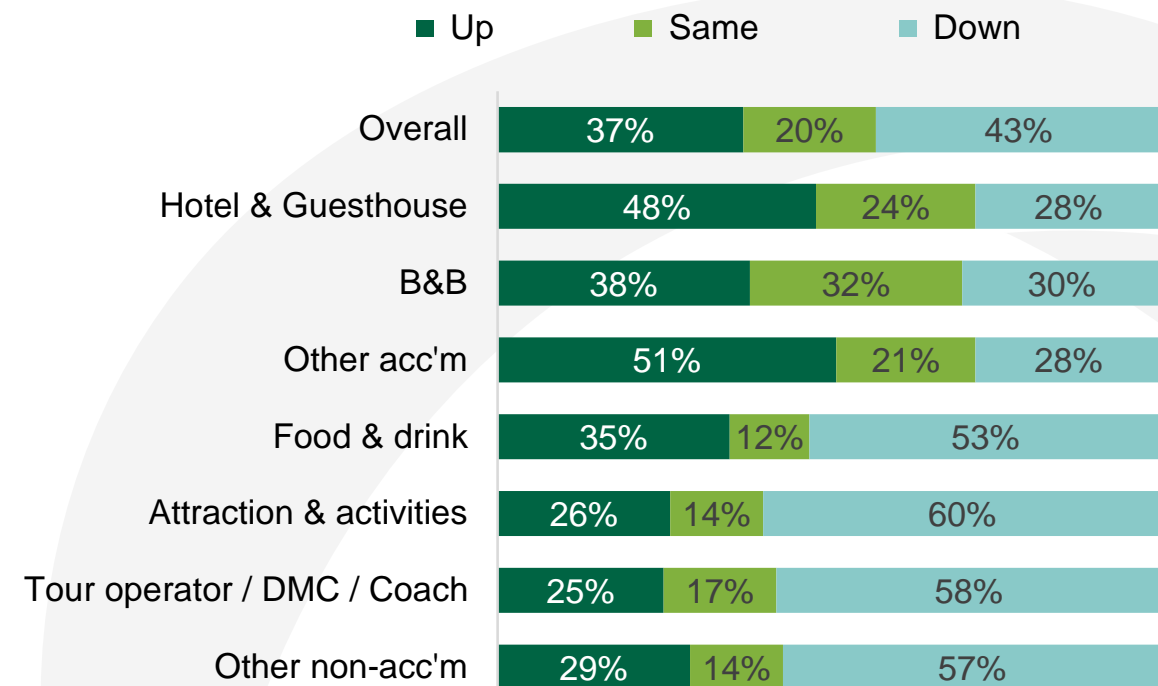
Performance vs Pre-Covid

Accommodation exceeding pre-Covid levels

- The majority of accommodation businesses report that the volume of business is at or ahead of pre-Covid norms
- However most non-accommodation sectors report that volumes are down on pre-Covid norms
- There is also a geographical divide in results
- Non-hotspots for tourism have recovered to pre-Covid levels, with 43% of businesses up vs 40% down
- Hotspot* areas are still recovering, with 34% of businesses up but 45% down

"Business has come back but not to the volume for this time of year that's needed"
Chauffeur, Cork

Q5 "How does the volume of your overall business to date this year compare to a normal pre-Covid year?"



Base: 548

'Don't know' and 'not applicable' answers have been excluded

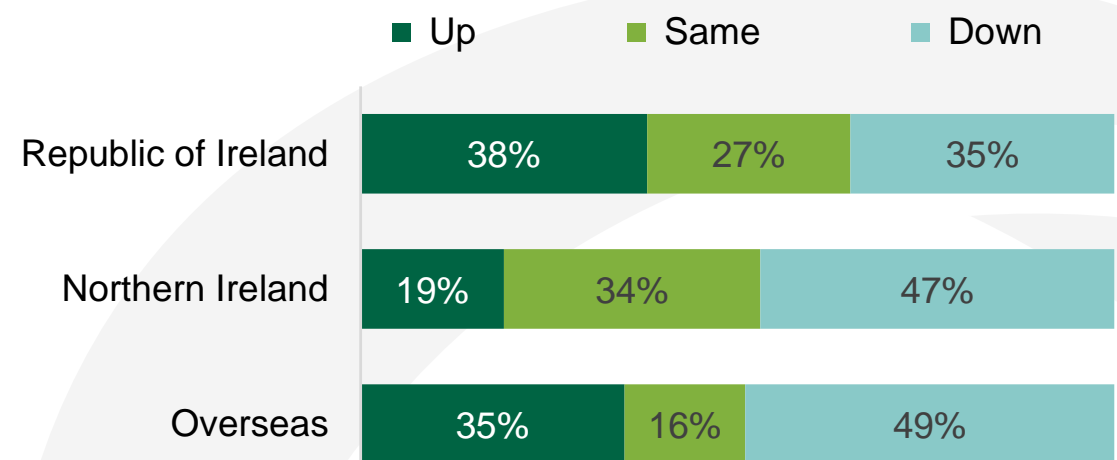
*Hotspot areas are defined as Clare, Cork, Donegal, Dublin, Galway, Kerry, Kilkenny and Wexford

Performance by Market

Domestic market still important for recovery

- The domestic market became much more important during the times of international travel restrictions and it remains important.
- 65% of caravan & campsites and 63% of hotels report domestic guests are up for the year to date vs pre-Covid.
- Many businesses comment positively on the return of overseas visitors this year.
- Volumes, however, have yet to reach pre-Covid norms.
- 12 out of 18 inbound tour operators / DMCs still report that overseas visitors are down vs 2019 and previous years, although, as mentioned previously, the majority see an improvement compared to 2021

Q6 "How does your volume of visitors to date this year compare to a normal pre-Covid year from each of the following markets?"



Base: variable

Performance by Overseas Market

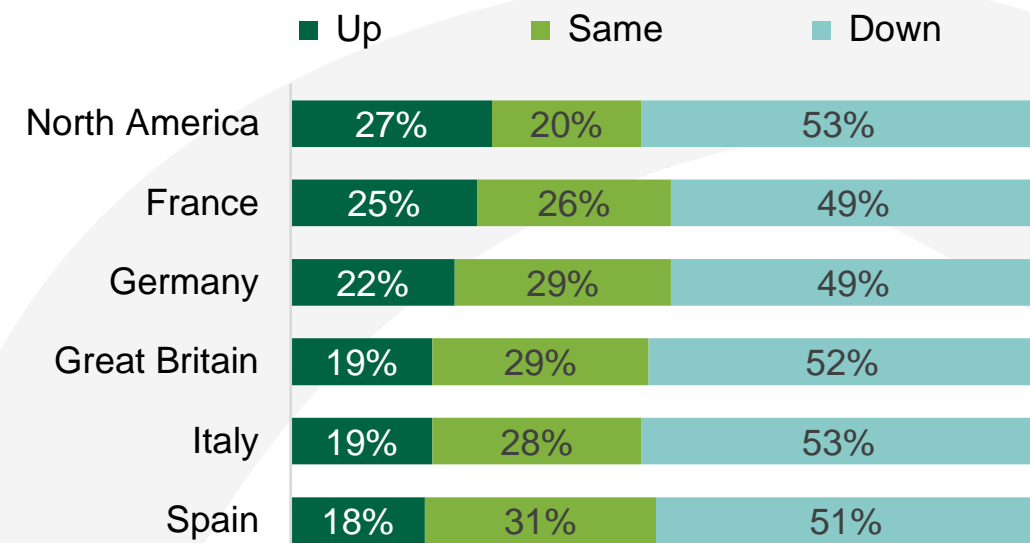
Overseas markets still recovering

- Reasons to be positive, discussed in full later, show that many operators are excited about the return of overseas visitors this year, especially Americans.
- Figures however show that all major overseas markets still have some way to go before recovering to pre-Covid levels
- B&Bs go against this trend with the French and German markets:
 - 48% of B&Bs are up on French visitors (vs 30% down)
 - 37% of B&Bs are up on German visitors (vs 28% down)

"US visitors have returned in strength"
Attraction, Cork

"It's been a very busy year post-Covid"
B&B, Louth

Q7 "How does the volume of your business to date this year compare to a normal pre-Covid year from each of the following markets?"



Base: variable

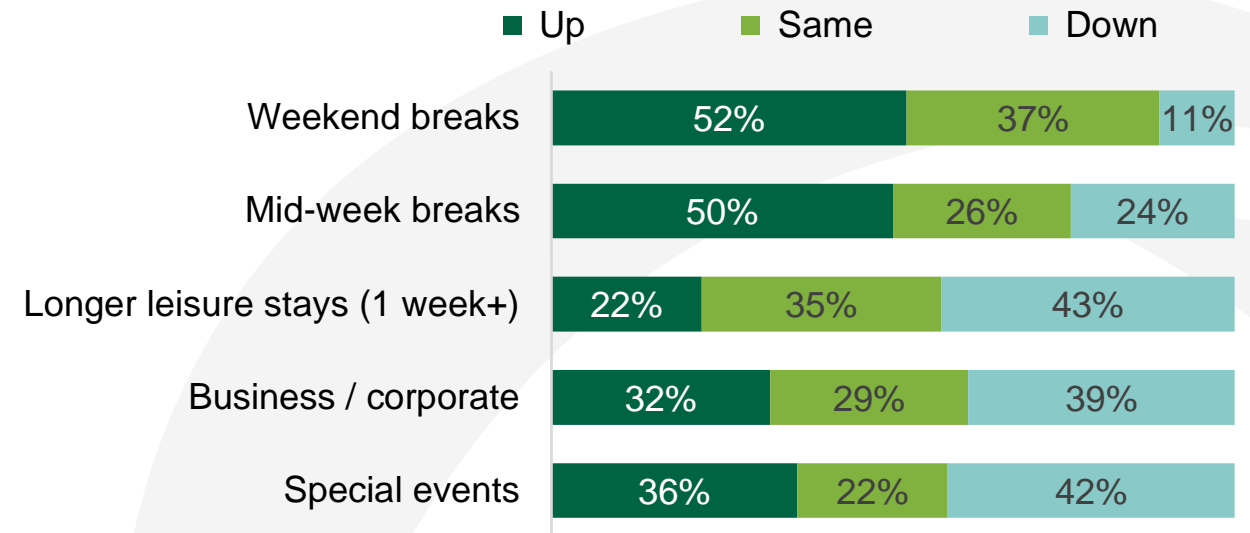
Hotels – Ireland Market



Shorter stays compared to pre-Covid

- Short domestic stays are going very well for hotels – both weekend breaks and mid-week breaks are well ahead of pre-Covid norms
- But the market for longer leisure stays is not yet what it was in the years before Covid.
- The markets for special events and corporate business both suffered during Covid but are now approaching pre-Covid levels

Q8 "Thinking about your Ireland market business this year, how have each of the following performed compared to a normal pre-Covid year?"



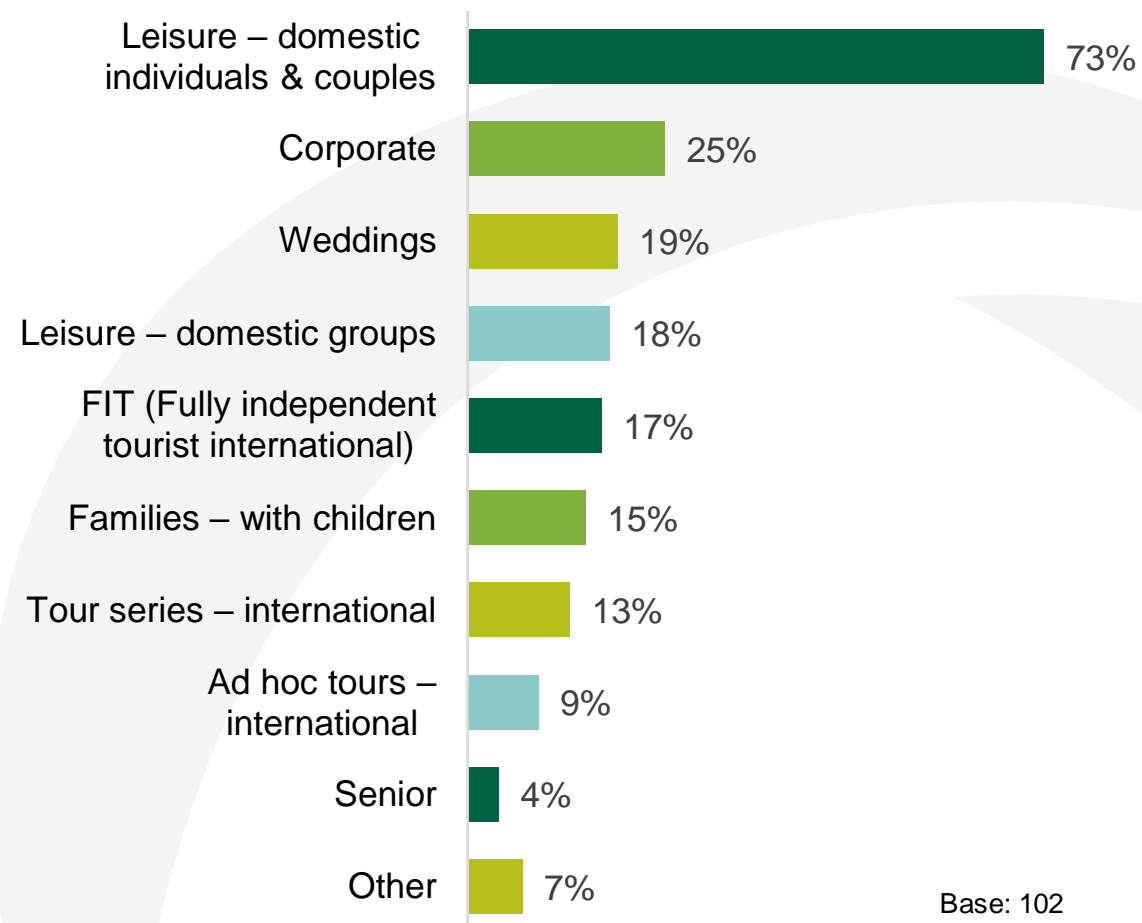
Base: variable

Hotels – Sources of Business

Domestic individuals and couples a key source

- Hotels serve a number of different markets - the domestic leisure market for individuals and couples ranks significantly higher than other sources this year.
- This is mentioned particularly frequently in tourism hotspots* (78% of hotels)
- Responses are more diverse in non hotspot areas, where 40% cite weddings and 37% cite corporate as their top two sources

Q9 "Which are your two main sources of business this year?"



*Hotspot areas are defined as Clare, Cork, Donegal, Dublin, Galway, Kerry, Kilkenny and Wexford

Overall Expectations

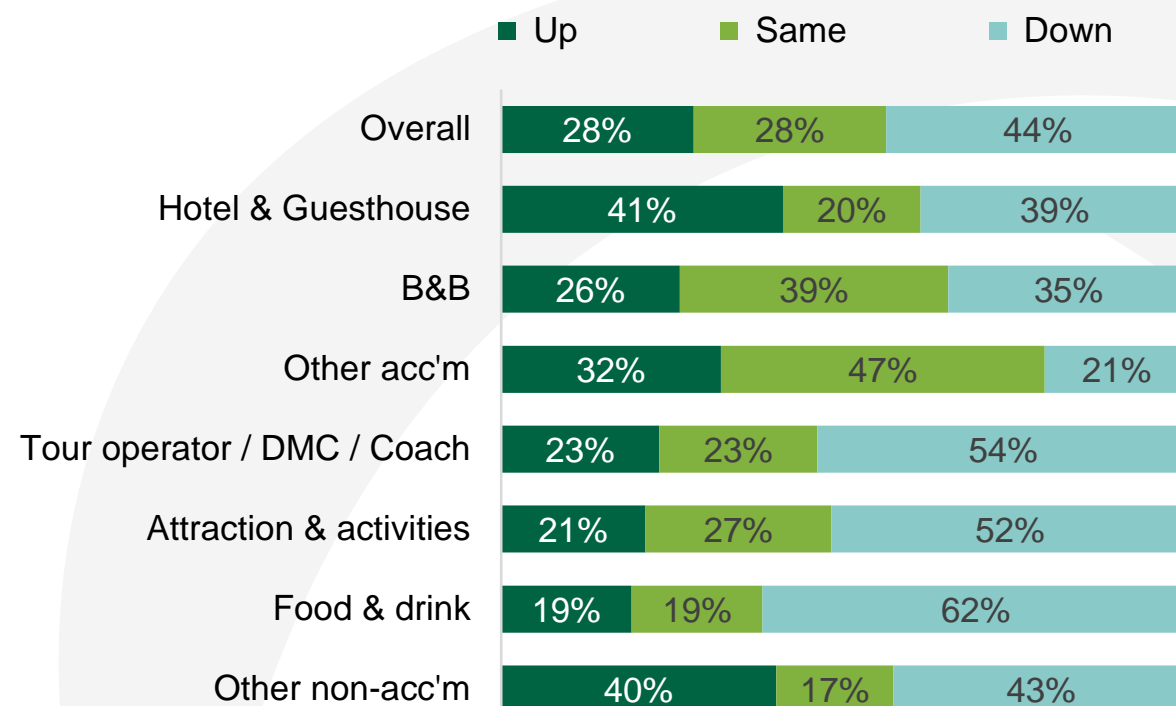
Accommodation sectors more optimistic

- Expectations for the remainder of the year are more positive in the accommodation sectors than non-accommodation
- Expectations by region do not vary significantly
- Volume* of business however is not the main concern for some – rather how they can make ends meet with soaring costs (discussed in full later under issues of concern)

"I have decided to close during winter months due to escalating energy costs"
B&B, Kilkenny

"Overall a positive outlook for the remainder of the year but concerns about how long this will last given the rate of inflation"
Hotel, Laois

Q10 "How do you expect the volume of your overall business to perform during the remainder of the year compared to the same period in a normal pre-Covid year?"



Base: 516

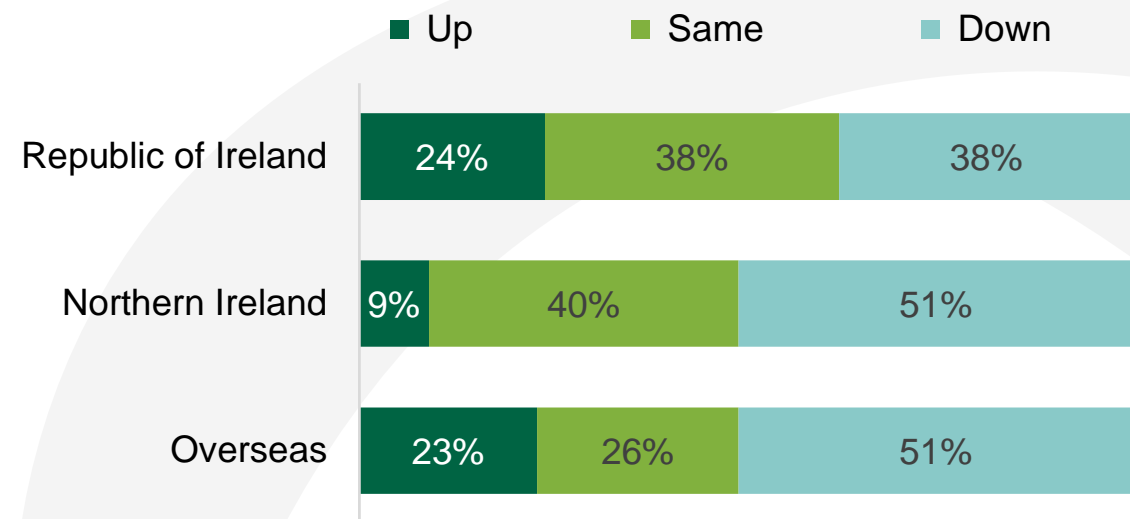
'Don't know' and 'not applicable' answers have been excluded

Expectations by Market

All markets not expected to be at pre-Covid levels

- The domestic market has supported the industry at crucial times during Covid, but it is not expected to achieve pre-Covid volumes during the remainder of this year, although this differs by sector:
 - 27% of accommodation providers expect the domestic market to be up vs 30% down;
 - 21% of non-accommodation operators expect the domestic market to be up vs 45% down.
- Overseas and Northern Ireland volumes are expected to be down across all sectors and regions compared to pre-Covid.
- We will discuss the reasons later under ‘issues of concern’.

Q11 "How do you expect the volume of your business to perform during the remainder of the year compared to the same period in a normal pre-Covid year from each of the following markets?"



Base: variable

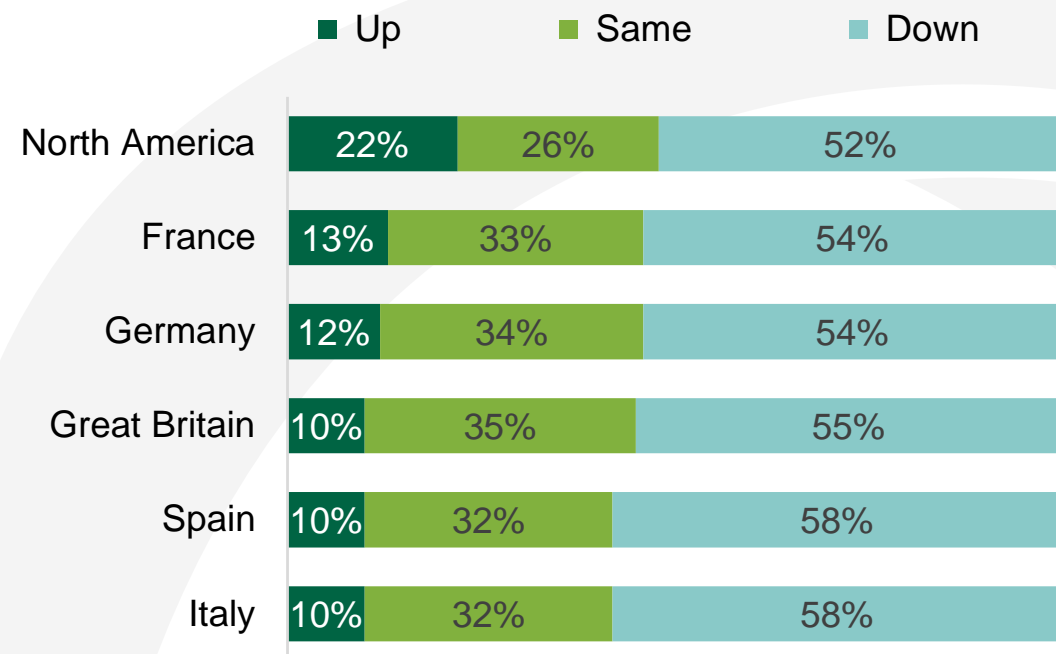
Expectations by Overseas Market

North America the best hope from overseas

- North America stands out as the most promising overseas market, although it is not expected to perform at pre-Covid levels
- Expectations for European markets are very similar—there is little expectation of reaching pre-Covid levels during the remainder of this year
- These findings are consistent across all sectors and regions

“North American visitors have returned in large numbers in 2022”
Golf club, Sligo

Q12 "How do you expect the volume of your business to perform during the remainder of the year compared to the same period in a normal pre-Covid year from each of the following markets?"



Base: variable

Sustainability Measures



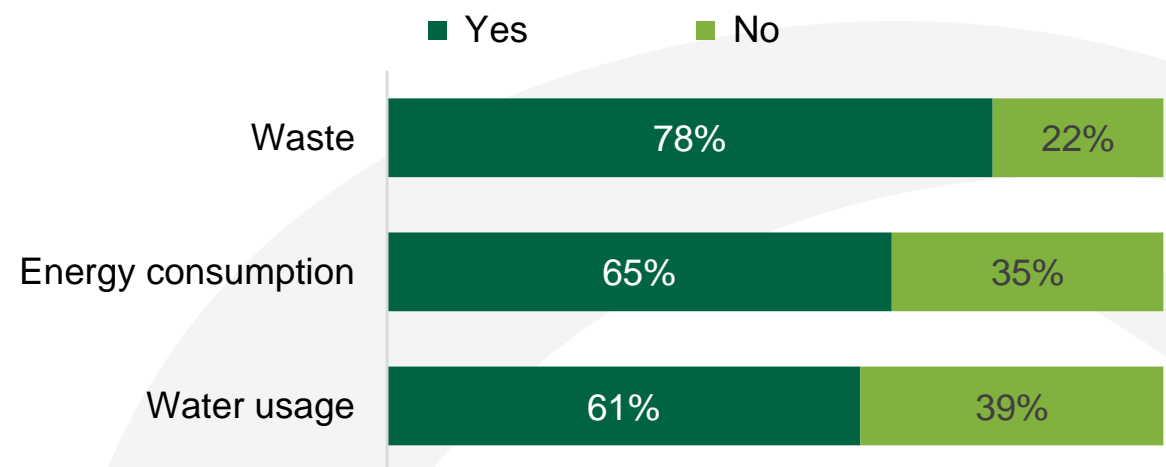
02/09/22 | Tourism Barometer

Measures in Place

Many already have sustainability measures in place

- Measures to manage business' waste sustainably are commonplace across all sectors, and energy consumption & water usage are also each managed sustainably by well over half of businesses.
- With water and energy, hotels and attractions stand out ahead of other sectors:
 - 84% of hotels and 74% of attractions have water management systems in place;
 - 82% of hotels and 73% of attractions have energy management systems in place.
- With soaring energy prices, there is now a strong incentive for businesses to manage consumption more closely.

Q13 "Do you have measures in place to manage your business' ... in a sustainable way?"



Base: 576

"Really worried about the cost of energy ... we are in the process of looking at ways to mitigate this cost through SEAI with heat pumps, solar panels but all this takes time and capital"
Hotel, Limerick

Future Intentions

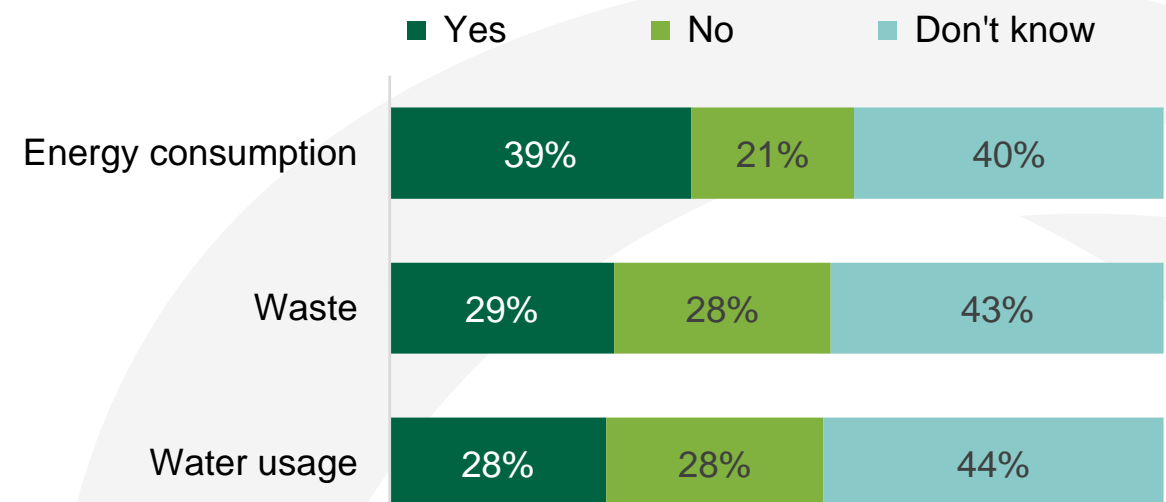
Mix of intentions

- If businesses do not already have a certain measure in place, there are mixed attitudes towards implementing it in the next 12 months
- The sample for each measure is too small to break down by sector.
- Soaring energy costs are a key reason to take action

"Our energy costs have increased significantly ... there is no way to get planning for solar or wind in our location. We already have all LED and high energy rated appliances. We now turn everything off, trying to invest in timers and meters."

Pub, Dublin

Q14 "Do you plan to implement measures to improve your business' sustainability in any of the following areas during the next 12 months?"



Base: variable

Each measure has been asked to businesses not already implementing it in Q13

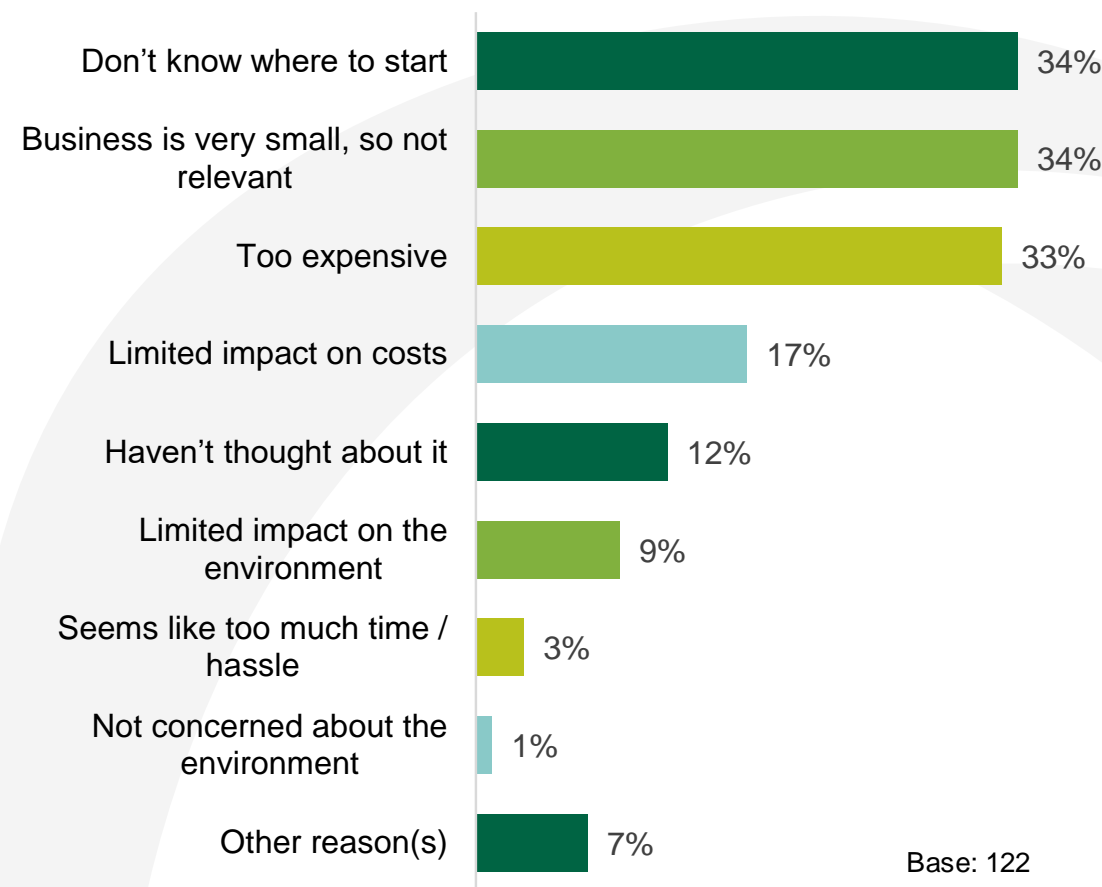
"For us, it is all about energy savings at the moment"
Hotel, Kerry

Energy Consumption – Reasons for No Plan

Mix of reasons

- Some barriers to taking action on managing energy consumption sustainably could be addressed, whereas others may be less straightforward to tackle.
- Perceived irrelevance due to small size may be a more engrained barrier, but operators can be informed on how their actions can improve their efficiency and reduce their costs.
- Perceived too high costs and limited impact on costs may or may not be based on having looked at options.
- Soaring energy prices may soon outweigh the costs of managing consumption ‘as is’ for some.

Q15 "Are there any particular reasons why there is no plan to manage energy consumption in a sustainable way?"



Base: 122

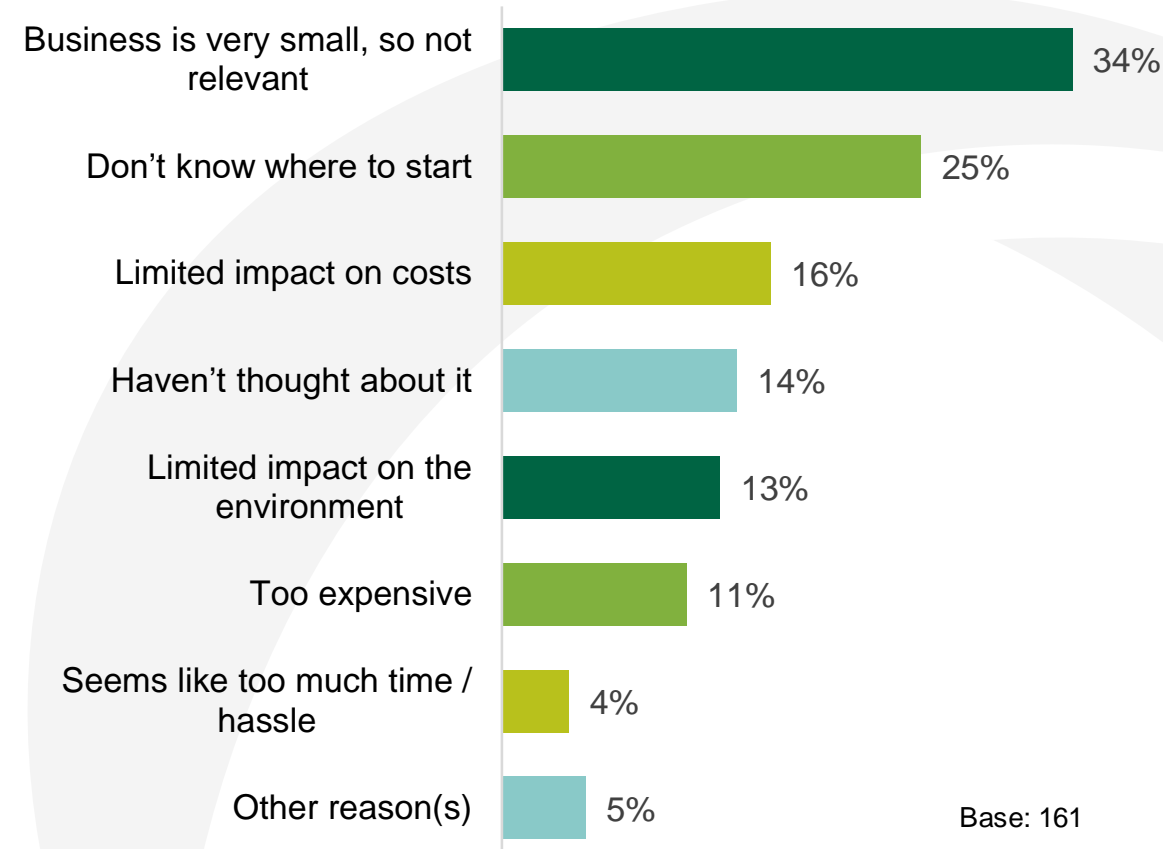
Water Usage – Reasons for No Plan

Not perceived as relevant by some businesses

- Some businesses explain why water usage is not highly relevant to their business – especially if their customers do not spend time in premises (e.g. transport).
- Related to perceived irrelevance by business type is limited impact on costs and/or environment.

“Not really relevant apart from giving clients bottled water on a daily basis while travelling. Glass refillable bottles would be too expensive and not impactful enough as clients are not here long enough”
Inbound tour operator, Meath

Q16 "Are there any particular reasons why there is no plan to manage water usage in a sustainable way?"



Waste – Reasons for No Plan

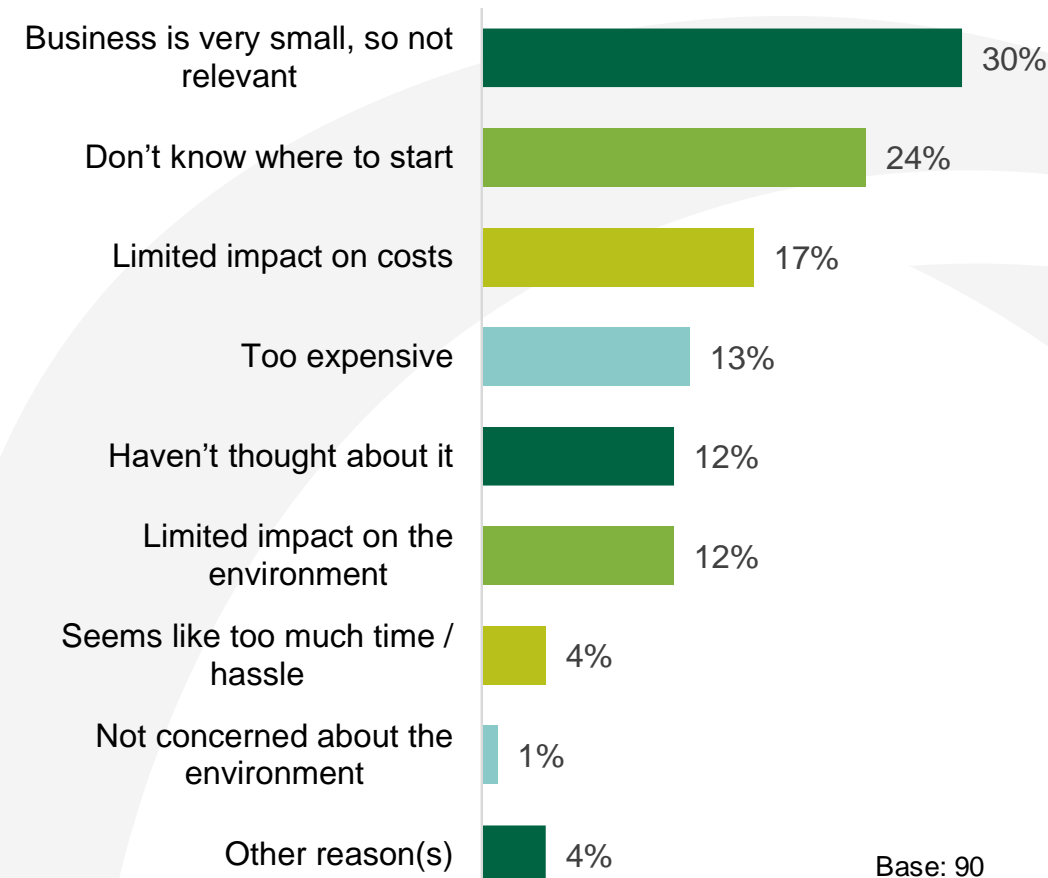
Similar reasons to energy and water

- The top two reasons remain perceived irrelevance and not knowing where to start.

"We don't have electricity, water or waste bins and operate 'leave no trace'"
Attraction, Wexford

"We feel our options available are limited. We are currently in talks with suppliers with regards to more environmentally friendly items."
Hotel, Dublin

Q17 "Are there any particular reasons why there is no plan to manage waste in a sustainable way?"



Base: 90

Reasons to be Positive or Concerned



02/09/22 | Tourism Barometer

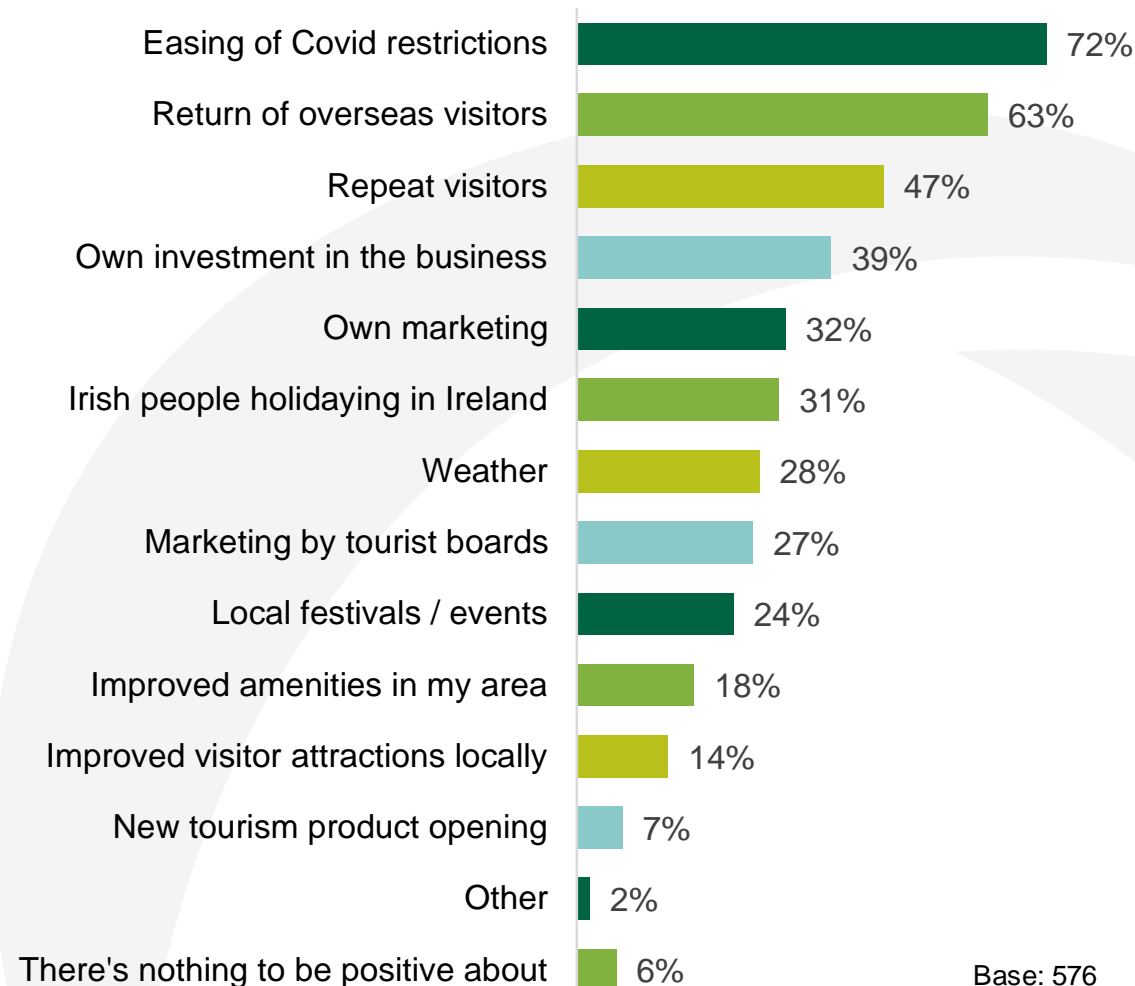
Reasons to Be Positive

Welcoming back overseas visitors

- The top two stand-out positives this year – easing of Covid restrictions and return of overseas visitors – are linked
- Although volume figures show that overseas visitors are not yet back to pre-Covid levels, operators are happy to see them returning
- B&Bs (82%) and inbound tour operators / DMCs (79%) in particular cite the return of overseas visitors as a reason to be positive
- Americans in particular are being noticed

"North American visitors are the only market that is up for us"
Attraction, Carlow

Q18 "Are there any particular reasons to be positive about business this year?"



Reasons to Be Positive – Open Comments (1)

Welcome back, overseas visitors

- Whilst not yet returning in pre-Covid volumes, the sight of overseas tourists is a welcome morale boost after the very tough Covid years and significant cost challenges about to escalate
- There seems to be something in particular about the Americans that boosts the industry's mood.
- The current dollar / euro exchange rate is said to be helping to attract Americans

"The very strong US dollar is certainly helping make Ireland affordable"
Golf club, Sligo

"The US is making almost all of the difference in the upturn"
B&B, Cork

"The strength of the US dollar against the euro is helping extend our season into October. Smaller group size but a greater spend by the travelling guest."
Inbound tour operator, Kerry

Reasons to Be Positive – Open Comments (2)

General reasons to be positive

- Open comments in this wave are dominated by concerns; optimistic operators are in the minority
- Optimistic businesses include those who are happy with their business' recovery and feel they are in a good place to prosper

"I am doing everything possible to rebuild my business and I'm very positive about my business going forward"
Pub, Wexford

"Very positive season; investment is planned over the next 1-5 years"
Activity provider, Donegal

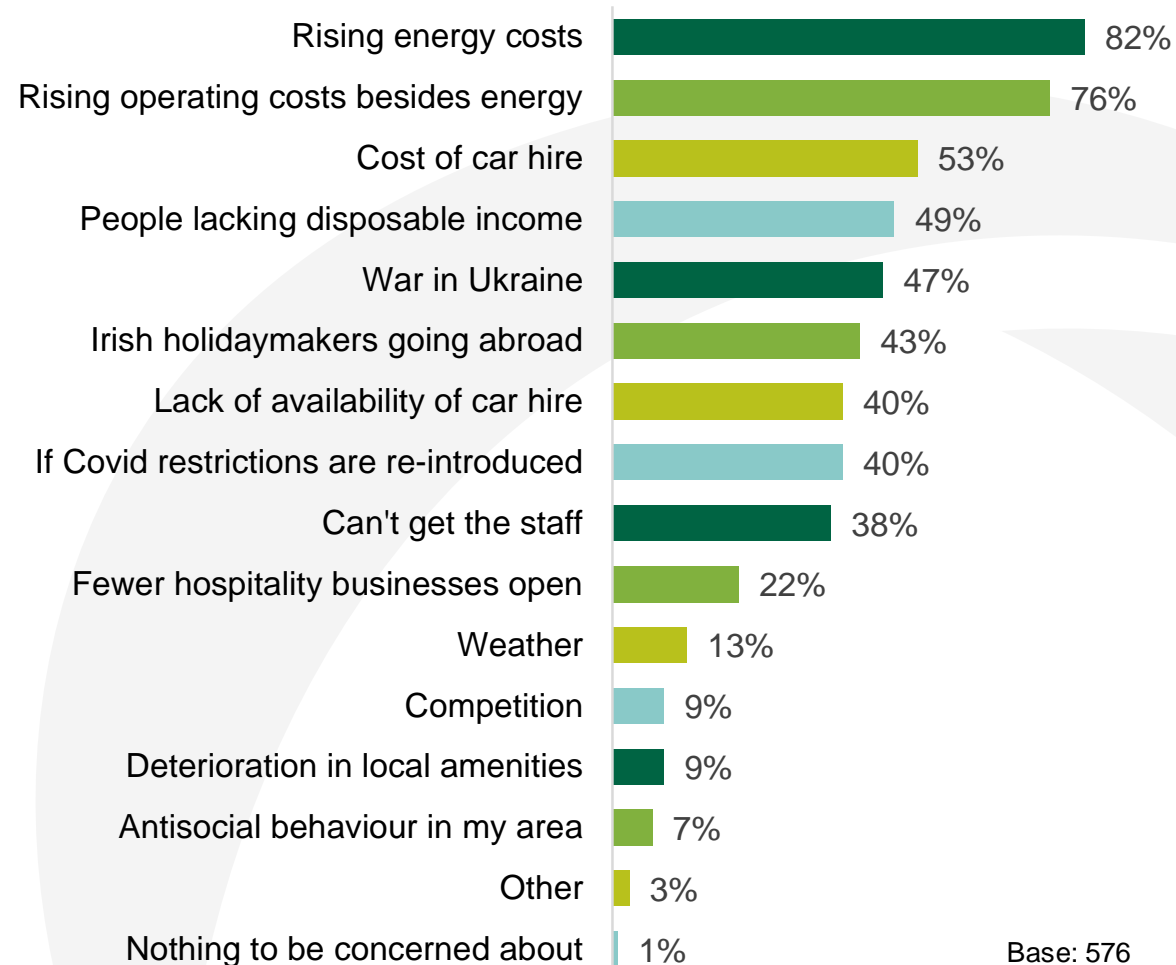
"Outlook for tourism in Monaghan is strong as we operated from a low base traditionally, but given recent improvements in offerings and brand development, opportunities are starting to open up."
Attraction, Monaghan

Reasons to Be Concerned

Rising costs now dominate concerns

- Covid has been replaced as a key concern by more topical issues.
- Costs of running the business are top of the agenda, and the next two concerns – car hire and disposable income – relate to costs to the consumer.
- Operating costs ranks highly as concerns in all sectors and regions.
- Cost of car hire is particularly concerning for:
 - B&Bs (80% cite this)
 - Businesses outside Dublin (57%)
- Car hire affects customers being able to reach certain parts of the country and/or certain types of business

Q19 "Are there any particular causes for concern regarding business this year?"



Reasons to Be Concerned – Open Comments (1)



Rising costs are the new dominant concern

- Volume figures show that some sectors, especially accommodation, have fared quite well this summer
- But some operators are quick to point out that this doesn't mean their business is doing well financially
- Healthy visitor volumes mask the underlying serious concerns that many operators have over how to make ends meet

"Even with cutbacks there's not enough business to cover the increasing costs"
Bar, Longford

"Very difficult trading times with every bill going out of the business at an increasingly alarming rate"
Pub, Cork

Reasons to Be Concerned – Open Comments (2)



Effects of car hire issues

- Lack of supply has pushed car hire prices up
- Businesses in more remote areas are greatly affected by this because public transport is not always comprehensive and some potential customers are going elsewhere

"People are unable to hire cars due to ... pricing and as we are a location with very poor public transport, it is resulting in no access for visitors, leading to lack of bookings and increase in cancellations"
Attraction, Kerry

Can't get the staff

- Recruitment remains a challenge for many tourism operators

"We are thinking of retiring as it is impossible to get staff. We are absolutely exhausted and even though it has been a fantastic year, we are debating if it is worth it at the end of the day. We work 17 hours a day, so without staff this is unsustainable."
B&B, Galway

"Several guests called family and friends to tell them to cancel Irish holidays due to hire car costs and availability/size."
B&B, Galway

Reasons to Be Concerned – Open Comments (3)



Downsizing

- Some operators faced with unsustainable costs and lack of staff are left with little choice but to downscale their operations in terms of capacity and/or opening times / seasons

“Rising basic but essential costs combined with reduced footfall can only result in poor service, reduced opening hours and cut to man hours.”

Attraction, Offaly

Return of poor value for money perceptions

- During the economic boom years for Ireland’s economy, some businesses felt that Ireland acquired a reputation internationally for being poor value for money
- It took some time for perceptions about this to subside
- Now some operators feel that hotel and car hire prices, especially in Dublin, will tarnish Ireland with that reputation again

“Seriously considering downsizing. Cost of staff, energy, waste. Don’t know if it will add up to offering the same level of service or food in the next year.”

Restaurant, Sligo

“Hotel pricing is a serious deterrent for overseas visitors at the moment”

Inbound tour operator, Galway

“Any North American holidaymakers I have spoken to did not realise Ireland was so expensive and were not planning a return trip”

Café, Roscommon

Reasons to Be Concerned – Open Comments (4)



Effects of accommodating Ukrainians

- Many accommodation operators in Ireland have responded to calls to give a temporary home to Ukrainians fleeing the war in their home country
- The importance of doing this is well understood across the industry
- Unfortunately, the knock-on effect on tourism is a lack of available accommodation in some areas

“Limited bed supply in the area due to the businesses taking Ukrainians has put extra pressure on those who are open”
Guesthouse, Galway

Calls for regional airport development

- Some operators based outside of Dublin cite recent problems at Dublin Airport and the value for money of Dublin’s offering
- They would like to see more air traffic coming in through regional airports

“Our business was hugely affected by the war in Ukraine as we were asked to accommodate the refugees fleeing it. Until the war is finished and/or the refugees are re-housed, we are afraid our business will suffer. We are however delighted to be helping the refugees and are doing our best to help them integrate into Irish society.”
Hotel, Clare

Individual Sectors



02/09/22 | Tourism Barometer

Hotels

A good year for visitor volumes – short domestic breaks

- 72% of hotels welcomed more guests this summer than in summer 2021, compared to only 14% being down
- 46% of hotels have had more visitors to date this year than in a normal pre-Covid year, compared to 27% being down
- A strong domestic market for short breaks has been key

But significant concerns looking forward

- In spite of a healthy year in terms of visitor numbers, many hotel operators look forward with a sense of trepidation
- Soaring energy costs and continued staff shortages dominate their agenda

“Ireland will remain high in choices of where to holiday for long & short term breaks and will still be an attractive option for long term investment”
Hotel, Galway

“A big worry going into winter with a steady drop off in business forecasted and energy prices, overheads, staff availability and rates all a major concern”
Hotel, Meath

“Uncertainty about huge rise in energy costs and the almost impossible task of recruiting staff are overwhelming all discussions / decisions. Future planning is nearly impossible in these circumstances.”
Hotel, Cork

B&Bs

Very busy year for B&Bs which are open

- 77% of B&Bs have had more guests this summer than last summer; only 9% are down.
- 38% of B&Bs have had more visitors to date this year than in a normal pre-Covid year, compared to 30% being down.
- 82% cite 'return of overseas visitors' as a reason to be positive – the highest proportion of any sector to say this.
- B&Bs have gone against the trend of slow French and German markets by increasing their volumes from these countries.

Added context

- Apparent buoyancy of B&B sector should be viewed in the context that some B&Bs have closed permanently or have not yet reopened since Covid
- The most recent accommodation occupancy survey reported that of B&Bs contacted, around a third had still not reopened in June

"We have seen how huge the industry has become ... the tourists are very happy with the lovely restaurants and cafés around the peninsula."
B&B, Kerry

"Hope next year will match this one"
B&B, Kerry

"I see major problems for the B&B industry in Ireland with the closure of so many businesses"
B&B, Kerry

Self-Catering

Repeat visitors bringing a positive year for self-catering

- 45% of self-catering businesses have had more guests compared to summer 2021; only 21% report being down.
- 52% report more visitors year to date compared to pre-Covid norms; only 27% are down.
- Self-catering is one of very few sectors to outperform pre-Covid norms for overseas visitors – 33% are up year to date, compared to 27% down.
- 77% cite repeat visitors as a reason to be positive – the highest proportion of any sector to say so.

“A number of visits this year were ones that had been planned to take place in the Covid years”

Self-catering, Dublin

“Hope business keeps up!”

Self-catering, Galway

Caravan & Campsites

Strong domestic market this year

- 50% of caravan & campsites report more visitors this summer than summer 2021; 36% are down
- The sector is outperforming pre-Covid years: 52% are up on visitors year to date compared to pre-Covid; 24% are down
- A strong domestic market is behind the results: 65% record more domestic visitors in the year to date compared to pre-Covid years; only 12% are down
- 57% cite 'Irish people holidaying in Ireland' as a positive factor – the highest proportion of any sector to say this
- Open comments from this sector are noticeably more upbeat than in most other sectors

*"The weather is the key for camping.
Accommodation costs are driving people to
camping and caravanning."*
Caravan / campsite, Kerry

"A very satisfactory year for us"
Caravan / campsite, Donegal

"Having a very good season"
Caravan / campsite, Kerry

Activity Providers

A difficult year – numerous challenges

- 25% of activity providers have had more visitors this summer than last summer, but 57% have had fewer.
- Similarly, 23% are up on visitors year to date compared to pre-Covid, but 55% are down.
- Activity providers face a number of challenges which are specific to their sector, or specific to their type of business within the sector:
 - Very high insurance costs
 - Extra sensitivity to fuel prices (e.g. boating activities)
 - Dependence on good weather
 - Staff shortages requiring a niche skill (trained instructors).

“Diesel prices are what affect me the most”
Activity provider, Sligo

“A number of costs have risen considerably in the equestrian sphere, including insurance, horses and horse maintenance expenses. Availability of capable and qualified staff is also a major issue, irrespective of pay rates offered.”

Activity provider, Tipperary

“As an outdoor activity, the weather in June and July was not great”
Activity provider, Louth

Attractions

Up on last summer, but not compared to pre-Covid

- 58% of attractions have had more visitors this summer compared to last summer; 32% are down.
- However, the sector is still down on pre-Covid norms – 21% are up year to date, but 69% are down.
- Attractions seem to be missing overseas visitors still, even though 68% cite 'return of overseas visitors' as a positive – 24% say this market is up compared to pre-Covid, but 73% are down.

Frustrated by issues in other sectors

- Some attractions feel frustrated by the circumstances of other sectors affecting them – especially the cost & availability of car hire, quality of public transport and high hotel prices.
- If these and other factors put off visitors from holidaying in Ireland, then the attractions suffer.

"We maintain a positive outlook for the remainder of the year. We have three large festivals over the fall period and look forward to offering more events to tie in with the Winter in Dublin programme. We have surpassed our expectations for summer, so we are cautiously optimistic about the remainder of the year."

Attraction, Dublin

"It is frustrating that inaction on issues such as improving public transport, accommodation accessibility and the emerging cost of living crisis will prevent us from thriving rather than just surviving"

Attraction, Cork

"The visitors this year had a rough time with the cost of accommodation and car rental. I would hate to think that this year's visitors would spread the word that Ireland was expensive. This might have a negative effect on 2023 outlook."

Attraction, Galway

Pubs and Bars

Up on last summer, but not pre-Covid

- 48% of pubs & bars have had more customers than last summer, whereas 29% have had fewer.
- 33% have had more customers year to date than pre-Covid, but 55% have had fewer.

Significant concerns looking forward

- Rising energy and other operating costs are affecting all sectors, but pubs & bars (along with restaurants and cafés) seem particularly concerned – 94% cite rising energy costs as a concern.
- ‘People lacking disposable income’ is cited by 69% as a concern – along with cafés, this is the highest proportion of any sector.
- Staffing remains a problem, with 50% citing this as a concern.

“Rising energy costs and knock-on effects are a huge danger. We may be busy, but we won't be profitable”

Pub, Sligo

“Outlook seems bleak due to rising costs, both for the business and the consumer, leading to a lack of discretionary expenditure.”

Pub, Donegal

Restaurants

Reasonable summer, but still down on pre-Covid norms

- 9 out of the 20 restaurants answering about visitor volumes say they have had more customers this summer than last summer; the same number report being down.
- 8 out of 20 restaurants welcomed more customers year to date compared to pre-Covid, but 12 are down.

“The increased cost of doing business for a restaurant is unrealistic to sustain going into the future”
Restaurant, Clare

Similar issues to pubs & bars

- Similar to pubs & bars, restaurants are particularly concerned about energy & other operating costs and lack of staff compared to other sectors
- 22 out of 23 restaurants are concerned about energy costs, and 21 are concerned about other operating costs
- 17 out of 23 say they can't get the staff they need

“Non-availability of staff, and I can't see the situation changing at all in the future. I have to turn away business due to our staffing levels. Energy costs, food costs and staff costs will drive up the selling price of our offering, which may price us out of the market. You can't do business if you are not making money, so I am deeply concerned for the future.”
Restaurant, Louth

DMCs and Inbound Operators

Welcome return of overseas visitors, but need more

- 17 of the 18 DMCs & inbound tour operators giving figures on visitor volumes this summer say they have had more visitors compared to last summer
- 5 have had more visitors year to date than pre-Covid, and 2 have had the same level, but 12 are still down
- 15 out of 19 respondents cite 'return of overseas visitors' as a positive this year; there is however still some way to go to reach pre-Covid levels

Difficult to plan in this sector with current economic issues

- International travel trade business is often booked a long time in advance
- Current economic uncertainties are making planning difficult
- Some operators say they are being hampered by Ireland's competitiveness with its high hotel prices and by contracting delays

"We are finding suppliers do not have 2023 rates / availability in a timely manner. Booking patterns are early for 2023, yet we cannot secure 2023 rates, availability of accommodation or tee time availability. It is nearly September 2022 and I still cannot finalise proposals for clients requested in February 2022 that include certain golf courses"

Inbound tour operator, Kerry

What is this research about?

Background

- The key aims of this research are to understand:
 - Visitor volumes for businesses in 2022 compared to pre-Covid years
 - Reasons to be positive or concerned about business in 2022
 - Measures or intentions to operate sustainably

Method

- Fáilte Ireland designed a questionnaire which was set up online by SRI (Strategic Research and Insight), an independent research agency
- Fáilte Ireland distributed the survey link to its trade database on 22nd August 2022

Sample

Accommodation sector	Sample size
Hotels	102
B&Bs	91
Self catering	35
Caravan & campsites	28
Guesthouses	15
Other accommodation	11

- **576 responses in total after de-duping by business**

Non-accommodation sector	Sample size
Attractions	77
Pubs and bars	68
Activity providers	48
Restaurants	23
Inbound operators and DMCs*	19
Tour guides	15
Cafés	10
Golf clubs	9
Tour guides	8
Other non-accommodation	17

**Destination Management Companies*