

Tourism Barometer 2019

How tourism is faring and what the perspective is on the year ahead.

KEY:



Things are going great



Things are looking up



Bit of a downturn



Frosty Outlook



Headline Findings



Qualitative Findings



Overall Visitor Volumes 2018



Positive Factors for 2019



Issues of Concern 2019



Performance by Regional Experience Brands



Analysis by Broad Region



Hotels



Guesthouses



B&Bs



Self-Catering



Hostels



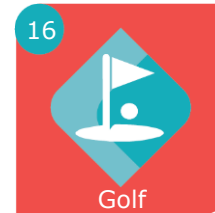
Attractions



Restaurants



Caravan & Camping



Golf



Appendix

Click on any button to jump straight to that section



01

- Business sentiment is down on balance for 2019 following a number of good years. This is fuelled by rising costs, the restoration of the VAT rate and low-priced competition as well as the uncertainty surrounding Brexit.
- The majority of these businesses (more than half) around the country are saying that business is down from Britain and Northern Ireland. Almost seven in ten say that the prospect of a no deal Brexit is causing them concern going forward.
- Growth from North America and the domestic market has helped to offset a disappointing performance from other markets.





Headline Findings

01

What is the Tourism Barometer?

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



Challenging year

Following a spell of many good years, the Irish tourism industry has run into challenges in 2019. In the PSA (paid serviced accommodation)¹ sector, about a third (31%) of businesses have welcomed more visitors to date in 2019 compared to 2018, and a further third (33%) have had a similar number. However, 36% report a decrease.

The domestic and North American markets continue to alleviate effects of the struggling British and Northern Irish markets, while mainland European markets have not grown as strongly as in recent years.

The CSO's "Overseas Travel" revealed that North American visitors to Ireland increased by 4% between January and September 2019, but visitors from Britain flatlined.

Deal or no deal?

The political situation in the UK has remained turbulent all year, and the Irish border is at the forefront of issues to be resolved so a deal can be agreed. This is greatly affecting sentiment in the industry.

'Prospect of a no deal Brexit' is by far the most frequently mentioned concern for 2019, cited by 67% of respondents.

All regions are now feeling the decline in British visitors

The PSA sector in Dublin bucked the trend in the British market in 2018 when the rest of the country was experiencing a decline. However, this year almost half (49%) of PSA operators in Dublin reported a decline in British visitors compared to the same period in 2018.

Rising costs, the restoration of the VAT rate and low-priced competition

The challenges faced by the industry are not limited to Brexit. Rising operating costs, perceived low-priced competition and the restoration of the VAT rate from 9% to 13.5% are all frequently cited as impacting performance this year.

Brand experiences continue to drive business

On a positive note, Fáilte Ireland's regional experience brands continue to drive tourism to the different regions of Ireland.

In particular, three in five (61%) businesses in the Wild Atlantic Way region state the brand as a positive factor affecting their business in 2019.

The newest brand, Ireland's Hidden Heartlands, is also starting to take effect. Close to half (45%) of businesses in the region mention the brand as a positive contributor to performance.

¹Specifically hotels, guesthouses and b&bs



Business Sentiment Index

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Up	15	28	39	41	60	68	70	72	57	51	31
Same	11	25	31	25	27	21	23	19	29	30	32
Down	74	47	30	35	13	11	7	9	15	18	37

Base: All Accommodation Providers (weighted to available rooms)

Sentiment has turned quickly

Following many 'feel good' years, sentiment in the accommodation sector has suddenly turned to negative on balance for the first time since 2010.

Now hotels are facing challenges

In recent years, hotels have been the driving force behind positive sentiment in the industry, but this has changed in 2019. While the domestic and North American markets have remained strong, the UK and mainland European markets have not.

Guesthouses are having a tough year. One in five (20%) cite increased visitors to date in 2019, but half (50%) have seen a decrease. Repeat visitors are currently a lifeline to this sector – most (92%) cite repeat business as a positive factor this year.

B&Bs continue to experience significant challenges. Some (13%) are up on visitors YTD, but over half (56%) are down. This is reflected across all major markets.

Attractions seeing the rewards of their own marketing

Close to two in five (37%) attractions have seen an increase in visitors year to date. The strength of the domestic and North American markets is behind this. Over half (57%) of attractions cite 'own marketing' as a positive factor on their performance this year.

Self-catering boosted by German market

In contrast to some accommodation sectors, self-catering seems to be holding quite steady in 2019. Three in ten (30%) have had more visitors, and 36% have received the same level. The self-catering sector is the only accommodation sector to see an upturn from Germany this year (42% are up).

2019 is a testing year for hostels

Some (22%) hostels have had more visitors this year, but about half (48%) have had fewer. A significant proportion (67%) are reporting that business from Britain is down and 62% are seeing a drop from Northern Ireland.

Caravan parks not having the same luck with the weather this year

Last year, the weather-dependent caravan & camping sector enjoyed the rewards of prolonged sunny weather. This year, 79% of caravan & campsites cite the weather as a concern. Overall, the majority (68%) of caravan & campsites have seen visitor levels decline this year.

Restaurants serving fewer tourists

Restaurants are experiencing a challenging year. One in six (17%) have had more tourist diners than last year, but over half (54%) have seen a decrease. The restoration of the VAT rate is a significant challenge for the sector. Also, about two in five (38%) say that customers are spending less.

Getting out the golf clubs

Golf operators are the only tourism sector to increase their visitors to date in 2019. Around half (48%) have had more visitors, and many others (43%) have had the same level. Major tournaments such as The Open in 2019 are said to have inspired the Irish to get out the clubs.





02

We have conducted depth interviews with key industry leaders (see appendix 1 for more details).

The main findings from these interviews are discussed in this section.

A varied year for stakeholders

Generally speaking it's been a very mixed year for stakeholders depending on which sector they represent. The service industry has struggled, attributing the restoration of the VAT rate as a key reason. Other businesses have seen similar visitor levels and profitability, whilst there has been growth in some sectors, most notably the airline industry. Bearing the different sectors' varied fortunes in mind, it's worth noting that they all generally share a much more pessimistic viewpoint going forward.

"It's been a disaster for our sector. Everything is down. We said this back in May and now the chickens have come home to roost"

"It's been a bit of a rollercoaster"

The Restoration of the VAT rate

One of the main concerns particularly amongst the service industry is the restoration of the VAT rate. This has a knock-on effect throughout the business in terms of profitability. The only way to counteract this is to increase prices, which for small businesses isn't practical.

"We represent smaller operators, so a 4.5%pt increase has a huge knock-on effect on profitability"

Brexit

Understandably Brexit is a very hot topic and in general quite divisive.

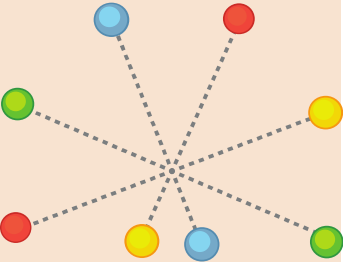
Whilst Brexit in general is a concerning factor for some sectors, there is a strong consensus from the stakeholders that the biggest concern regarding Brexit is the UK exiting the European Union without a deal.

"We're very concerned about it. Nobody knows what it's going to bring [...] We've put certain things in place in terms of suppliers and making sure we can still get the products."

"Brexit would be a big concern for most people in the hotel business"

There are those who look at Brexit much more favourably, noting the measures that have been put in place to prepare for any eventuality.

"From a consumer point of view, airlines will continue to fly between Ireland, the UK and the EU countries whether there is a deal or not"





Qualitative Findings

A good year for aviation

It is a very good year for airlines. There are record passenger numbers and record levels of growth.

This has been linked to Ireland being looked at as a more favourable destination for smaller carriers to fly to due to the uncertainty of Brexit.

US market

Whilst the US market has been a strong one for Ireland over the last few years, stakeholders are generally more restrained regarding future growth. This comes about as a result of the looming Presidential election but also escalating trade wars between the USA and some other countries.

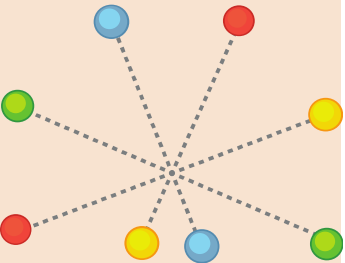
"What we don't want is to feel the effects of a US/China trade war or an EU/US skirmish... The last thing you want is US sentiment to Ireland adversely affected when we already have that happening with our nearest neighbour".

Looking forwards:

Across all sectors, stakeholders are generally quite downbeat going forward and it's fair to say this stems from the uncertainty of Brexit.

"Typically our business has been strong across all markets in 2019 but 2020 certainly is going to be more challenging..."

"For next year we're looking at a more temperate level of growth due to the 'B' word, probably in the region of 3 or 4%."





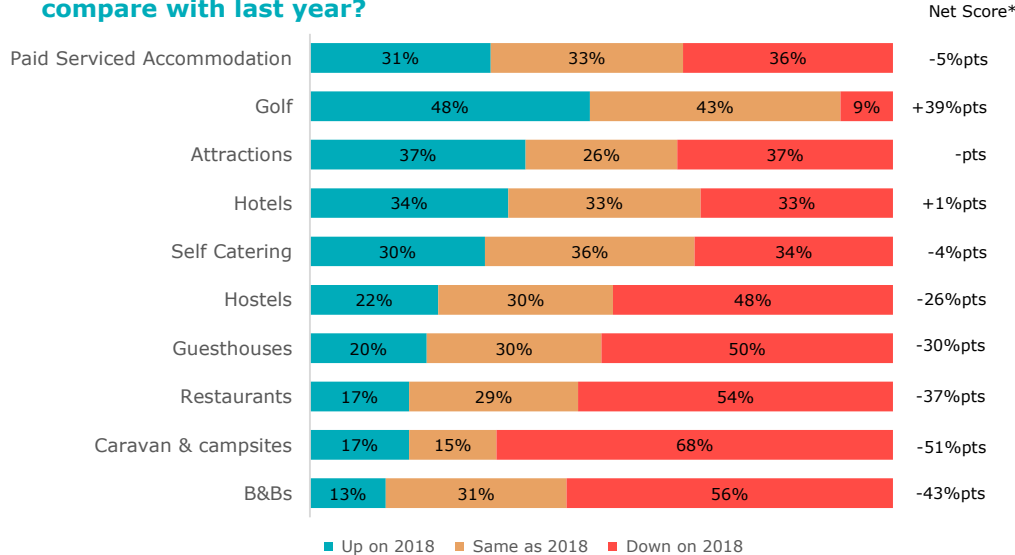
Overall Visitor Volume to date 2019

03

In this section we discuss the performance in 2019 and expectations for the industry overall.

More detailed results by market for each individual sector are discussed in subsequent sections.

How does the volume of your overall business in 2019 compare with last year?



*Net Score = Business up on 2018 minus Business down on 2018

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

Challenging year for the industry

Following a spell of many good years, the Irish tourism industry has run into challenges in 2019. Only the golf sector has experienced a significant upturn in visitor levels, while many sectors are notably down compared to last year.

"The Open being in Ireland really influenced business as golf tours travelled around Ireland"
Golf club

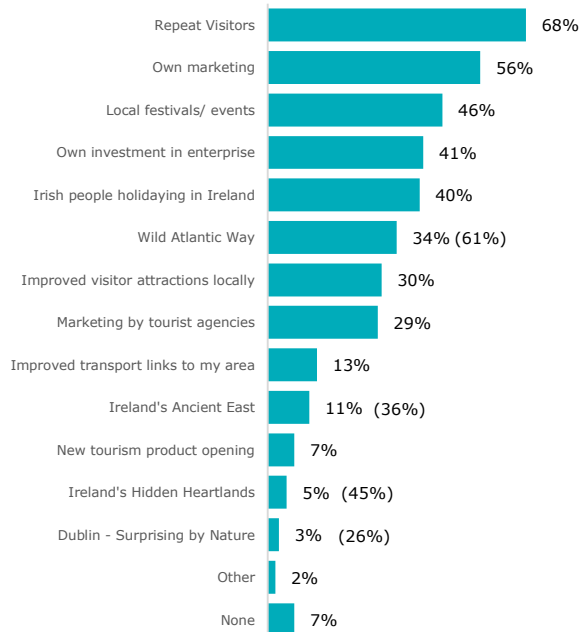
"Business volume is down this year"
Hostel



Positive Factors for 2019

04

What are the main positive factors affecting your business this year? (Prompted)



() = businesses within the specific programme area

Repeat visitors are as important as ever

Repeat visitors are consistently considered the main positive factor affecting performance. During challenging times such as this year, they are as important as ever in keeping operators going. Two of the most challenged sectors this year have the highest proportions of operators citing repeat business as a positive factor – guesthouses (92%) and caravan parks (86%).

Own marketing continues to reap rewards

During challenging times, some operators seem defeated by the market conditions, whereas others take initiative and compete for the business that is out there.

"We have worked with the local area to make our business more visible, so we have put up banners and a plaque"
Attraction

Regional experience brands as positive factors

The regional experience brands are very much needed to drive tourism during these challenging times. The Wild Atlantic Way continues to perform well, with 61% of businesses in the region citing the brand as a positive factor.

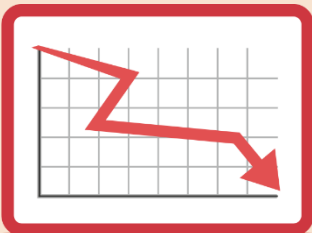
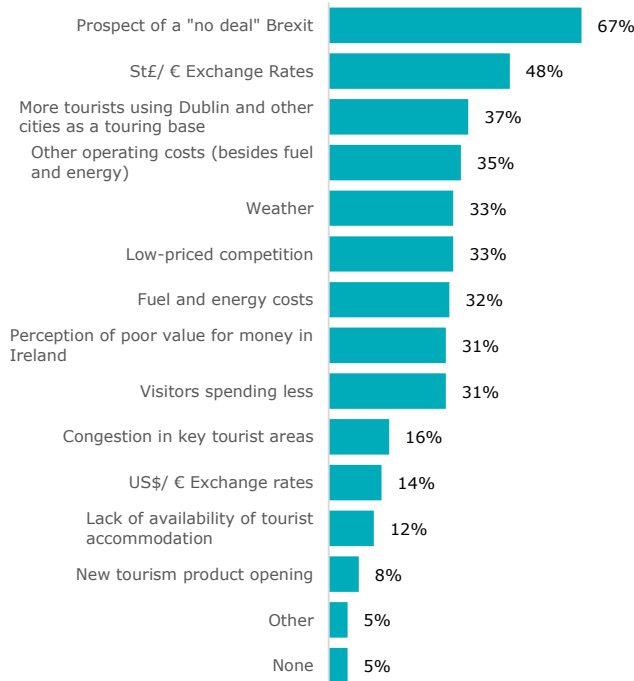
Ireland's Hidden Heartlands is the newest of the brands, and it is starting to take effect. 45% (9 out of 20) of businesses in the region cite it as a positive factor.

"Everything Fáilte Ireland is doing for us is great. We're really grateful."
Caravan park



05

What are the main issues of concern, if any, affecting your business in 2019? (Prompted)



Uncertainty lies ahead

Brexit is currently dominating the news, as the UK Government presses on with its plans to leave the EU with or without a deal. The prospect of an exit with no deal is seriously concerning for the Irish tourism industry.

"It's not just the prospect of a no deal Brexit but the whole debacle and uncertainty. For example I heard from a US tour operator that if there is a [hard] border, they would withdraw from programming Ireland altogether due to the probable delays expected at the border and the loss of freedom of movement."
Attraction

Weak pound

The weak pound continues to hinder tourism from the UK. Given the current Brexit turmoil, the pound does not look like gaining significant strength in the immediate future.

Numerous rising operating costs

There are a number of operating costs which are concerning businesses, including fuel & energy, insurance and rates. These rising costs are eating into precious profit margins.

"Rates revaluation. It looks like our rates will more than double."
Guesthouse

"Insurance is a huge issue. We have to go abroad for it."
B&B

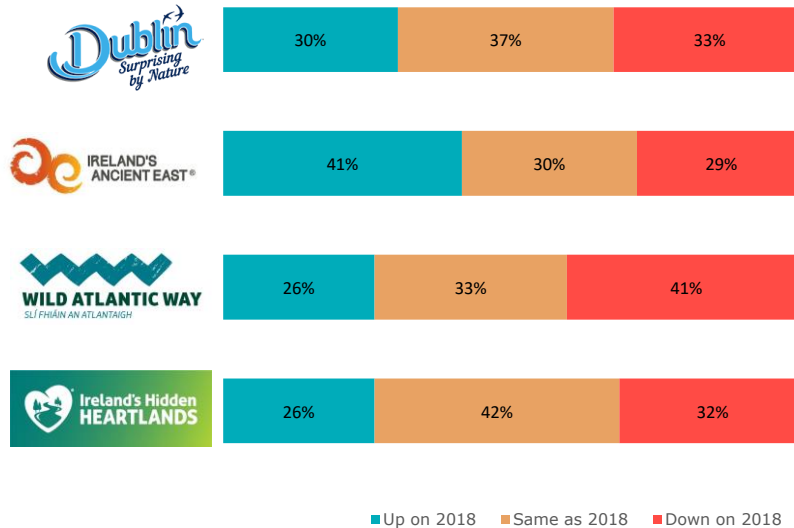


Regional Experience Brands

06

Here we discuss the performance by Fáilte Ireland's regional experience brands for the PSA sector

Performance by regional experience brand (PSA sector)



Performance is strongest in Ireland's Ancient East

Developing tourism in all regions of the country is a key part of Fáilte Ireland's remit. Dublin has been a strong tourism destination for a long time, whereas the Wild Atlantic Way, Ireland's Ancient East and Ireland's Hidden Heartlands initiatives have helped to disperse tourism beyond the capital.

The PSA sector is performing strongest in Ireland's Ancient East in terms of year-on-year performance.

Dublin and the Wild Atlantic Way have been established for longer and so visitor numbers are compared against a strong year in 2018.

A significant proportion of Ireland's Hidden Heartlands borders Northern Ireland and there is evidence that northern counties have been particularly affected by demand from NI. This may be a factor in IHH's performance this year.

The Ireland's Hidden Heartlands sample is low (20) and so results are indicative only.





Analysis by Broad Region

07

Here we highlight significant differences in results in the PSA sector between two pairs of broad regions:

- Northern counties vs Rest of the country
- Dublin vs Rest of the country

Northern Counties¹ vs Rest of the Country

Measurement	North	Rest of the Country
Overall visitor volume year to date Net*	-11	-3
Northern Ireland visitor volume year to date Net*	-47	-37
Overall expectations Net*	-30	-11

*% of Paid Serviced Accommodation (PSA) providers reporting business to be up minus % of those reporting business down

¹ Northern Counties include Cavan, Donegal, Leitrim, Longford, Louth, Mayo, Monaghan, Sligo

Effects of Brexit are felt everywhere

Until this year, barometer results showed a clear disparity between northern counties and the rest of the country in terms of Northern Ireland performance and Brexit concerns.

Northern counties are still impacted more, but the rest of the country is also feeling the effects of the Northern Ireland downturn, and Brexit concerns are less significantly different. Four in five (80%) northern PSA businesses are concerned about a 'no deal' Brexit, but most (72%) PSA businesses in the rest of the country are concerned as well.

Dublin vs Rest of the Country

Measurement	Dublin	Rest of the Country
Overall visitor volume year to date Net*	-3	-6
Great Britain visitor volume year to date Net*	-31	-45
Overall expectations Net*	-12	-16

*% of Paid Serviced Accommodation (PSA) providers reporting business to be up minus % of those reporting business down

Now even Dublin is losing GB visitors

Recent barometers have shown Dublin bucking the sharp decline in British visitors seen by the rest of the country. Now, however, Dublin PSA businesses are seeing the decline too.

Overall, Dublin is no longer performing better than the rest of the country, and for the first time in many years the proportion of its PSA businesses reporting decreased visitors outweighs the proportion seeing increased visitors.

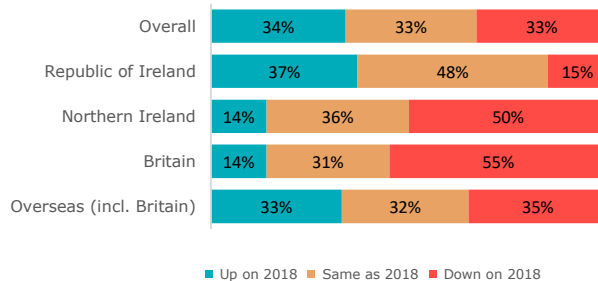


08



Hotels

Visitor volumes 2019



A mixed year for hotels

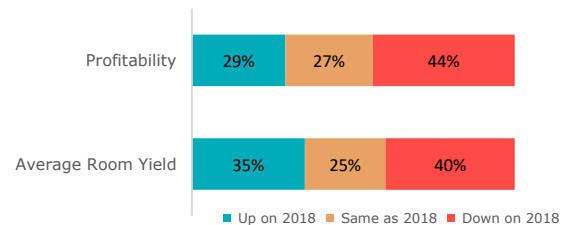
Hotels had been performing very well according to recent barometers until this one. 2019 is turning out to be a mixed year. The domestic market remains strong (37% of operators are up) but the Northern Irish and British markets are well down, as the poor value of the pound deters these consumers from travelling internationally. Half (49%) of hotels state the £/€ exchange rate as a concern this year.

"We are targeting different markets"

The North American market however is still performing well for hotels – some contributing it to the positive \$/€ exchange rate. Two in five hotels (40%) report this market being up, and the same proportion (40%) report it being level.

"Strong dollar exchange rate"

Average room yield and profitability



Profitability under pressure

Overall in the sector, more hotels (44%) report being down on profitability than up (29%).

Profitability is being challenged from a number of different angles – the restoration of the VAT rate (and not being able to pass the rise onto the consumer), rising operating costs and low-priced competition.

"VAT at 13.5% has cost us ... we are charging the same rates as last year"



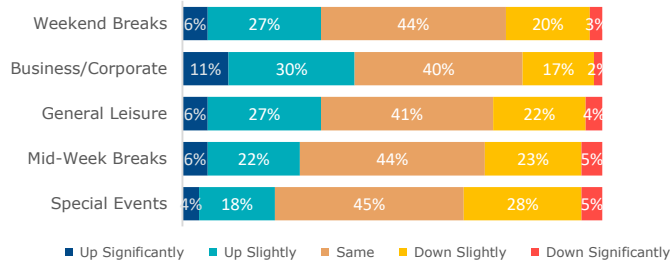
08



Hotels

Visitor types (Ireland market)

Thinking about your Ireland market business this year, how have each of the following performed compared with last year?



Corporate market continues to grow

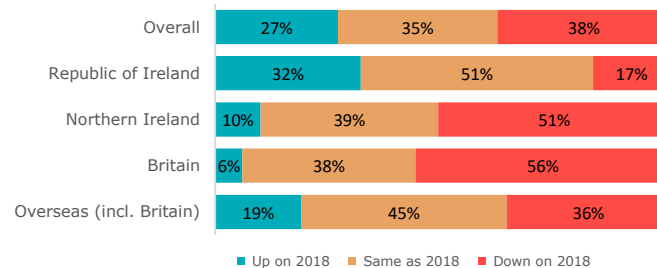
Corporate bookings continue to rise, with two in five (41%) hotels welcoming more business guests.

"Ad-hoc groups are visiting a local company for training"

Some hotels find success when changing their focus to a different market.

"A rejuvenated focus on our wedding market has helped"

Expectations by market for 2019



Not an optimistic outlook for the remainder of the year

The mixed year experienced by the hotel sector is not expected to improve. While hopes remain quite high for the domestic market, the UK market is expected to continue in its decline as another Brexit leaving date looms.

No overall increase from North American expected

In recent years and to date this year, the North American market has compensated for the decline in the UK market. However, for the remainder of this year, only about a quarter (23%) of hotels expect this market to be up, and 27% expect it to be down.

One operator points out that next year is election year in the USA, and past experience shows this can deter some Americans from travelling.

"Election year next year, so Americans tend not to travel across the sea until then"

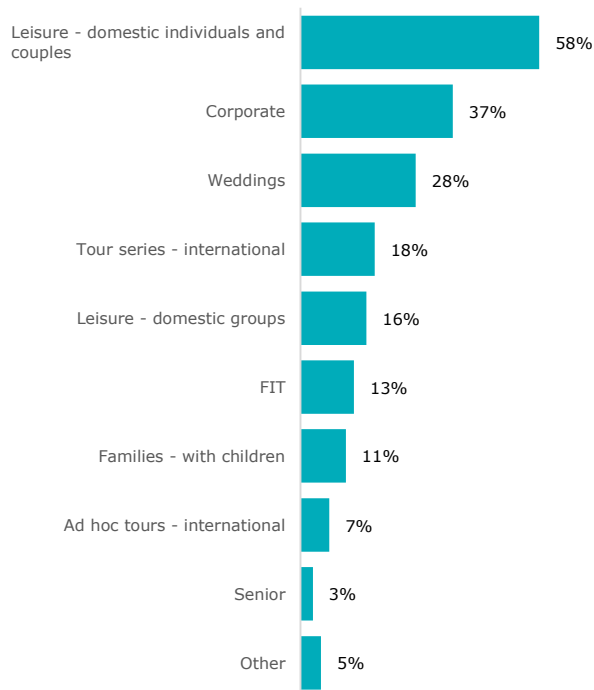


08



Hotels

What are your two main sources of business? (Prompted)



Domestic leisure

Irish individuals and couples visiting for leisure are the most frequently mentioned 'top 2' market by the hotel industry. This market is particularly important for hotels in the Wild Atlantic Way – 65% name this in their top 2.

Corporate business in Dublin

Domestic individuals and couples are also important to hotels in Dublin (68% name this in their top 2), but the most frequently mentioned 'top 2' market is corporate (76% of hotels).

Ireland's Ancient East – romantic setting for weddings

The wedding market seems to be especially important for hotels in Ireland's Ancient East – 42% name this as a 'top 2' market. This is a much higher proportion than in the rest of Ireland (21%).



Hospitality Sectors

09



Guesthouses

10



B&Bs

Graph Key

- Up on 2018 %
- Same as 2018 %
- Down on 2018 %

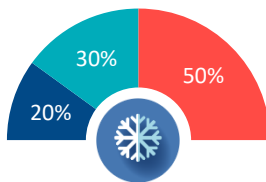


GUESTHOUSES

Visitor volumes to date 2019

Surviving on repeat customers

Except for North America, all other major markets are significantly down for guesthouses this year, especially Britain (72% are down) and Northern Ireland (75% are down). Over half (56%) cite 'low-priced competition' as a concern this year – the highest proportion of any sector to say this.



"Unregistered accommodation is diluting the market online"

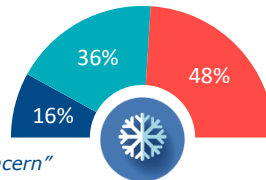
It seems that repeat customers are keeping the guesthouse sector going this year. Nearly all (92%) cite repeat visitors as a positive factor.

"We have 50 years' experience and a strong reputation"

Expectations for the rest of 2019

No upturn expected this year

Following a difficult main season, guesthouses do not expect an upturn in performance during the remainder of this year. All major markets are expected to be down, especially the UK (76% expect to be down).



"Brexit is the main concern"

"The [...] VAT increase meant we had to cancel our plans to reinvest in our business. We had planned to install solar panels to reduce our LPG bill but this has been put on hold."

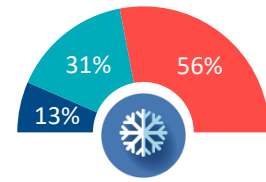


BED & BREAKFASTS

Visitor volumes to date 2019

Testing times

The B&B sector has seen all major markets decline this year, especially Britain (72% report being down). B&Bs are challenged by the same issues as in the rest of the serviced sector – Brexit, rising costs, the restoration of the VAT and low-priced competition.



"There needs to be a settlement to Brexit one way or the other"

Not all B&Bs are seeing business decline however, and some have positive news to report:

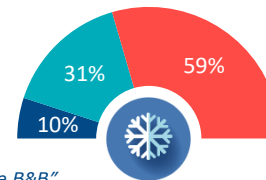
"I have got good reviews and it certainly helps guests to choose my accommodation over others"

"Waterford Greenway has brought new visitors to Waterford"

Expectations for the rest of 2019

All markets expected to be down

The challenging year experienced to date is expected to continue, with all major markets down.



"I am considering closing the B&B"

Nevertheless, some have hope:

"Hoping Taste the Island will be a big success"



Hospitality Sectors

11



Self-Catering

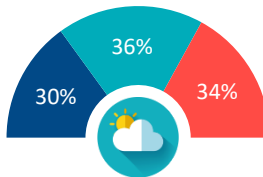


SELF-CATERING

Visitor volumes to date 2019

One of the more stable sectors

While some accommodation sectors are experiencing a very challenging year, self-catering operators seem to be coping better than most.



The domestic market is performing well (34% are up), as is Germany (42% are up). The self-catering sector is the only accommodation sector to see an upturn from Germany this year.

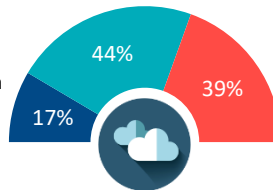
"Huge increase in Germans, who tell me they come for the nature and scenery"

"Increasing interest in gardens and 'green' environment"

Expectations for the rest of 2019

Stable year not expected to last however

In spite of some evidence of success to date this year, all major markets are expected to be down significantly during the remainder of 2019.



The issues are the same as those faced by the serviced sector: low-priced competition, Brexit, increased costs and the restoration of the VAT rate.

"Local Airbnbs are offering accommodation at a very low price"

"The higher VAT rate and insurance prices are putting pressure on business"

Graph Key

- ◆ Up on 2018 %
- ◆ Same as 2018 %
- ◆ Down on 2018 %

12



Hostels

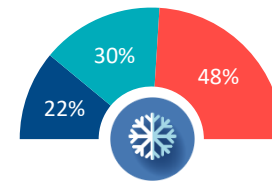


HOSTELS

Visitor volumes to date 2019

Fall in demand for hostels

All major markets are significantly down for hostels this year, especially Britain (67% are down) and Northern Ireland (62% are down).



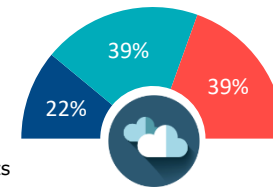
Hostels face similar issues to the rest of the accommodation industry – rising costs and Brexit in particular.

"Brexit is having a very negative impact"

Expectations for the rest of 2019

Similar pattern for the rest of the year

Hostels generally expect 2019 to continue as it has been to date. The British market is expected to struggle still (65% expect it to remain down). Disappointingly, the French and German markets are also expected to be down significantly, whereas these markets had been strong for hostels in recent years.



In spite of the downturn for hostels, some have positive feedback:

"The weather, good economy, local activities have been positives"



Attractions & Hostels

13



Attractions

14



Restaurants

Graph Key

- ◆ Up on 2018 %
- ◆ Same as 2018 %
- ◆ Down on 2018 %

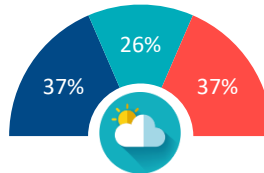


ATTRACTIONS

Visitor volumes to date 2019

Stable year for attractions

Overall, the attractions sector has experienced a stable year to date. The major markets which are up on balance are the domestic market (30% are up), Germany (28% are up) and North America (38% are up).



Own marketing brings rewards

Over half (57%) of attractions cite 'own marketing' as a positive factor on their performance this year. Social media is cited as being particularly effective in attracting visitors.

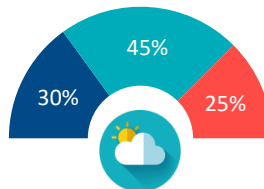
"Increased use of social media has helped to attract visitors"

"We have started a Facebook page and a Twitter account, which have increased the number of visitors"

Expectations for the rest of 2019

Steady for the rest of 2019

Attractions generally expect the stable year experienced so far to continue for the remainder of 2019. Hopes are strongest for the domestic market – 33% expect this market to be up and 55% expect it to remain level.



"We have recently had our millionth visitor"

"We are working on a rebrand and new marketing for next year"

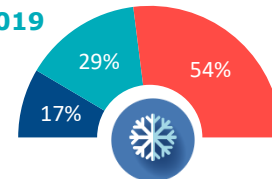


RESTAURANTS

Visitor volumes to date 2019

Tough times for restaurants

Restaurants are experiencing a challenging year. Whereas in recent years, some markets such as North America have made up for the shortfall in other markets, this year all the major markets are down significantly.



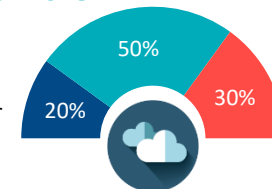
The restoration of the VAT rate is a significant challenge for the sector. Also, about two in five (38%) say that customers are spending less.

"The increase in VAT meant we had to put our prices up as we could not absorb the increase. Tourists don't understand why Ireland is so expensive."

Expectations for the rest of 2019

Similar outlook

Restaurants expect to continue the year in similar fashion, with all major markets being down.



"We are running into cash flow problems earlier in the year than normal"



Caravan & Camping and Golf Clubs



CARAVAN AND CAMPING

15

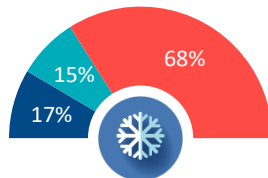


Caravan & Camping

Visitor volumes to date 2019

Caravan and campsites – sensitive to the weather and ferry routes

Caravan & campsites are particularly weather-dependent, and the success of some can also be sensitive to ferry routes, which are the means of access for overseas touring customers.



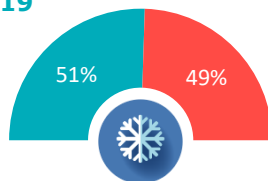
This year there are positive and negative comments about both those factors, but on balance the overall picture is not good. 79% of caravan & campsites cite the weather as a concern this year, and the loss of the Irish Ferries' route between Rosslare and France has affected some sites.

"The loss of Irish Ferries route Rosslare – France has had a huge impact on business"

Expectations for the rest of 2019

Not the season for camping

Most caravan parks do not stay open much beyond early / mid autumn.



Graph Key

- ◆ Up on 2018 %
- ◆ Same as 2018 %
- ◆ Down on 2018 %



GOLF CLUBS

16

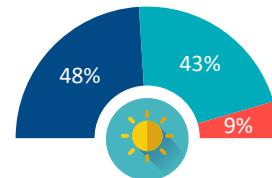


Golf

Visitor volumes to date 2019

Buoyant market for golf tourism

Golf clubs are the only tourism sector to increase their visitors significantly to date in 2019. Even the Northern Irish and British markets are up – which goes completely against the grain for the other sectors this year.



The North American market is performing very well, with 48% of golf clubs reporting increased visitors.

Major competitions taking place in Ireland in 2018 and 2019 are behind the interest from domestic and overseas golfers to play in Ireland.

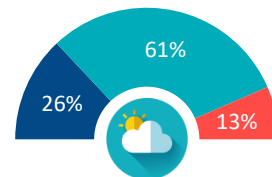
"Open Championship in Portrush [2019] and Irish Open Ballyliffin 2018"

"The Open [2019] is a specific event that people plan a year in advance to attend, and these competitions bring in business for all local clubs"

Expectations for the rest of 2019

Steady for the remainder of the year

Following a very successful year to date, the remainder of 2019 is expected to remain about level with last year, or be slightly up. This is reflected across the major markets.



"Domestic business has been significantly impacted by The Open in Ireland, with more people golfing"



Appendix 1: Background & Methodology

17



Appendix

Background and Objectives

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.

In November 2018, Strategic Research and Insight, an independent research agency previously called Strategic Marketing, was commissioned to continue conducting the survey for the next three years.

Fieldwork for this second wave in 2019 took place in September.

The objectives were to measure:

- Overall business performance in 2019 in terms of:
 - visitor volume
 - by key markets
 - profitability
- Average room yield (hotels)
- Visitor volume expectations for the remainder of 2019
- Positive factors and issues of concern affecting business in 2019

How have we conducted it?

Strategic Research and Insight (SRI), an independent research agency working on behalf of Fáilte Ireland, has received 341 responses to an online survey with tourism businesses in September 2019 and has conducted 300 top-up telephone interviews. SRI has also conducted seven qualitative interviews with senior industry executives.

Methodology

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

Fáilte Ireland and Strategic Research and Insight worked together to produce a questionnaire for online and telephone interviewing.

Fáilte Ireland provided a database of 2,456 usable contacts (i.e. not opted out) for the survey spread across nine industry sectors (discussed under 'sampling' below). An email was sent to all contacts on the database containing a link to the online survey and an explanation of the survey objectives. Two subsequent reminder emails were sent to non-responders.

A total of 341 responses were received to the online survey – a response rate of 14%.

Following this, we conducted 300 '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

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

Sector	Online Responses	Telephone Top-Ups	Total Sample Size
Hotels	124	82	206
Guesthouses	23	25	48
B&B	59	31	90
Self-Catering	41	64	105
Hostels	15	15	30
Caravan & camping	18	24	42
Attractions	39	33	72
Restaurants	16	8	24
Golf	6	18	24
Total	341	300	641

Interviews for Contextual Background

In a separate exercise, we conducted 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.