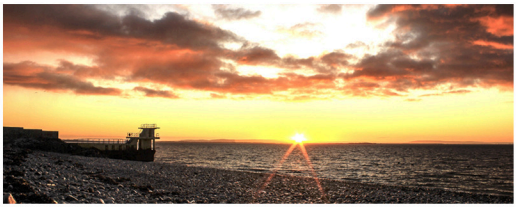
STRATEGIC MARKETING

Fáilte Ireland
National Tourism Development Authority

Tourism Barometer








May 2015

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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 530 responses to an online survey with tourism businesses in April 2015 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 (prospects for the year ahead)

	2007	2008	2009	2010	2011	2012	2013	2014	2015
Up	45	14	15	28	39	48	68	74	77
Same	24	18	11	25	31	26	21	18	20
Down	31	68	74	47	30	26	11	8	4

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

1.1 The year ahead is expected to see good growth, with more than three quarters (77%) expecting an increase in visitor volumes, according to the Business Sentiment Index. This upwards trend has continued since its low in 2008 and 2009.

Positive paid serviced accommodation increases

1.2 Six in ten (60%) weighted PSA operators have seen an increase in visitor volumes during the first months of 2015, with just 17% reporting to be down.

1.3 As in previous waves, hotels are the strongest sector, boasting increases for 66% of respondents. This is compared to more than a third (36%) of guesthouses and 31% of B&Bs who report an increase compared to the same period in 2014.

1.4 With a strong start to the year behind them, PSA operators are very optimistic about the rest of 2015, with all three sectors expecting increases above those already experienced (hotels 80%, guesthouses 61%, B&Bs 52%). Combined, the weighted response shows a predicted increase for 77% of PSA operators.

1.5 For the PSA sector, the overseas (69%), British (68%), North American (67%) and domestic markets (67%) are expected to show the most growth for the remainder of the year.

Self catering set for brighter year after mixed start

1.6 While nearly two in five (38%) responding self catering operators have seen an increase in the first months of the year, 20% report being down.

1.7 The remainder of 2015 is set to be more positive, with more than half (53%) expecting visitor volumes greater than those experienced in the same period last year. For three quarters of respondents, repeat visitors are reported to be a positive factor.

Strong year for hostels

1.8 Hostels are enjoying a very good 2015 so far, with 61% of respondents reporting an increase and an even better 78% expecting to be up during the rest of the year.

Attractions benefit from own marketing

1.9 Nearly six in ten (58%) respondents report being up so far this year, with 58% reporting an increase in the domestic market and 42% in visitor volumes from Northern Ireland.

1.10 The rest of the year should see stronger improvements, with 76% expecting larger volumes overall.

1.11 For 61%, their own marketing is reported to be a positive factor

Restaurants start steady, but set to increase

1.12 Some (39%) responding restaurants report an increase in visitor volumes so far this year, with the same proportion reporting level volumes and 22% reporting a decrease.

1.13 The rest of the year should fare much better. Six in ten (61%) predict larger visitor volumes than last year. An improved domestic economy is a positive factor for 73% of respondents and 65% expect to see an increase in the domestic market.

1.14 A further 63% expect increase in the overseas market and 70% predict growth from Great Britain.

Tourism industry growing in confidence

1.15 Improvements in the Irish economy have helped the growing optimism in the industry. The retention of the lower VAT rate has helped operators remain competitive in price while some have also started to reinvest in their businesses.

1.16 Good exchange rates between Great Britain and North America are helping boost visitor volumes from overseas as these markets grow in strength.

1.17 And those on the west coast continue to praise the Wild Atlantic Way initiative.

Costs and competition drop as a concern

1.18 After remaining a top concern for years, woes over fuel and energy costs are starting to reduce.

1.19 Similarly, low-priced competition remains a concern for some, but those citing it as an issue have dropped in number.

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.

Industry benefits from a positive shift

2.1 The year has started well for Ireland's tourism industry, with growth on the first months of 2014 and a strong Easter. The tone has improved as respondents start to see a continued increase in business.

"It's been a very good year so far. The Easter period has been very, very good and business is much better than previous years"

"It's been a good start to the year so there is far much more positivity"

"Growth, growth, growth"

"This Easter was stronger than last year. We saw increase across the board"

Boom in North American and GB markets

2.2 A leading factor contributing to a brighter outlook is the increase and growing confidence in some markets.

2.3 Thanks to improved economies and a good exchange rate, visitor volumes from Great Britain and North America are noticeably stronger.

"The UK market is looking more positive. Bookings are up and everyone is reporting an increase – mostly because of value for money"

"I expect a 20% increase in UK business and a 10% increase in US business this year"

"The UK and US markets have been strong this year compared to last year"

"The American market is very good for us at the moment. For the American travellers, the exchange rate is very good"

General overseas lift

2.4 While Britain and America may stand out as particularly strong markets this year, visitor volumes from overseas have generally increased. For some respondents, France and Germany are also showing improvements.

Businesses welcoming more domestic visitors

2.5 Additionally, the domestic market has seen marked improvements as Irish increase short breaks in the country – especially during warm weekends.

"The domestic market has come good"

"There has been a lift in the domestic market"

2.6 The start of the year has also seen an increase in visitors from Northern Ireland. Again, a driving factor for this is believed to be good weather.

"A lot of the Northern Ireland market came down south because of the weather"

Ireland's reputation is improving

2.7 There is a belief that the reputation of Ireland as a destination is improving overseas. Visitors and potential visitors consider it to hold better value for money than it did in previous years.

"I suppose the idea of Ireland being a rip-off is going"

"It's great to see the recovery of Ireland's reputation abroad"

"Value for money is the big positive factor. People are seeing that now"

Wild Atlantic Way remains a draw

2.8 Far from a flash in the pan, the Wild Atlantic Way continues to boost business along the West coast of Ireland.

"The Wild Atlantic Way is very attractive to the German market"

"The Wild Atlantic Way has had a huge impact on overseas visitors to rural parts of Ireland"

Growth is patchy

2.9 Overall, visitor volumes in Ireland have increased this year. But growth is inconsistent. 'Hot spots' like Dublin, Cork, Galway and Kilkenny are seeing stronger improvements than other parts of Ireland.

2.10 Some also believe that there remains a lack of capacity in Dublin City Centre, resulting in large groups being turned away.

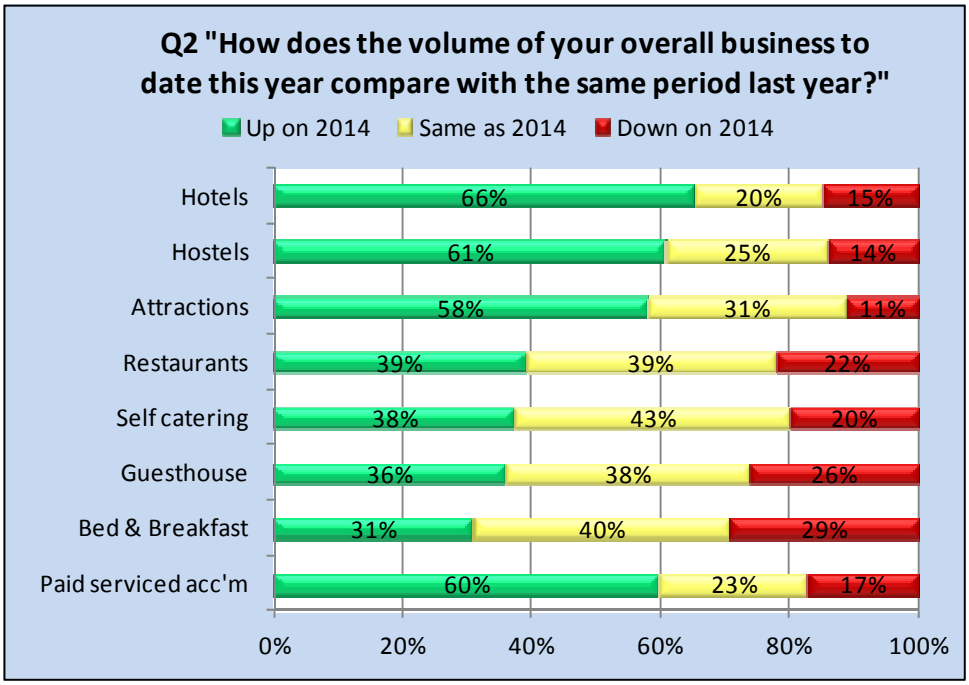
Double benefits from VAT rate

2.11 Maintaining the lower VAT rate has not only allowed tourism operators to remain competitive, but has started to allow for reinvestment in businesses.

3. Overall Visitor Volumes in 2015 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 2015



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.

Tourism industry enjoys a strong start to the year

3.1 There is a good level of optimism within the tourism industry after sectors enjoy a strong start to the year. A sense that the domestic economy continues to improve, along with decent weather and the Wild Atlantic Way initiative adds to a general feeling of positivity within the industry.

Hotels continue to thrive in 2015

3.2 Two thirds (66%) of hotels report their overall business to be up compared with the same period last year. This is a strong proportion, especially following last year's report which saw 69% report an increase.

A step up for hostels

3.3 Following closely behind hotels, 61% of responding hostels report an increase on the same period in 2014, which is stronger than last year's 45%.

Another strong start for attractions

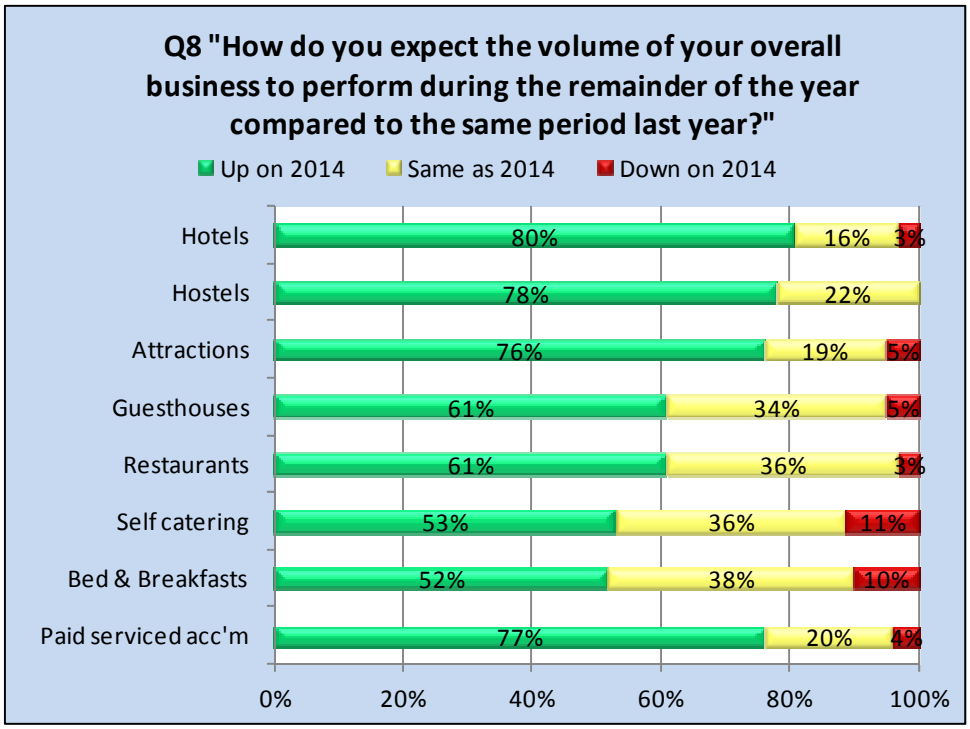
3.4 In 2014, half (50%) of responding attractions reported to be up on the previous year. This year, a larger proportion (58%) of respondents report an increase after the first few months.

Smaller increases across other sectors

3.5 While still seeing improvements, other sectors have not seen the same level of increase. Two in five (39%) responding restaurants, 38% of self catering operators and 36% of guesthouses report to be up on last year.

3.6 Nearly a third (31%) of B&B operators report an increase on the same period last year. However, a similar proportion (29%) report to be down.

Expectations for 2015



High expectations for 2015

3.7 Optimism runs high for the rest of 2015 following a good start to the year. All sectors expect to see an increase in business volumes compared to last year.

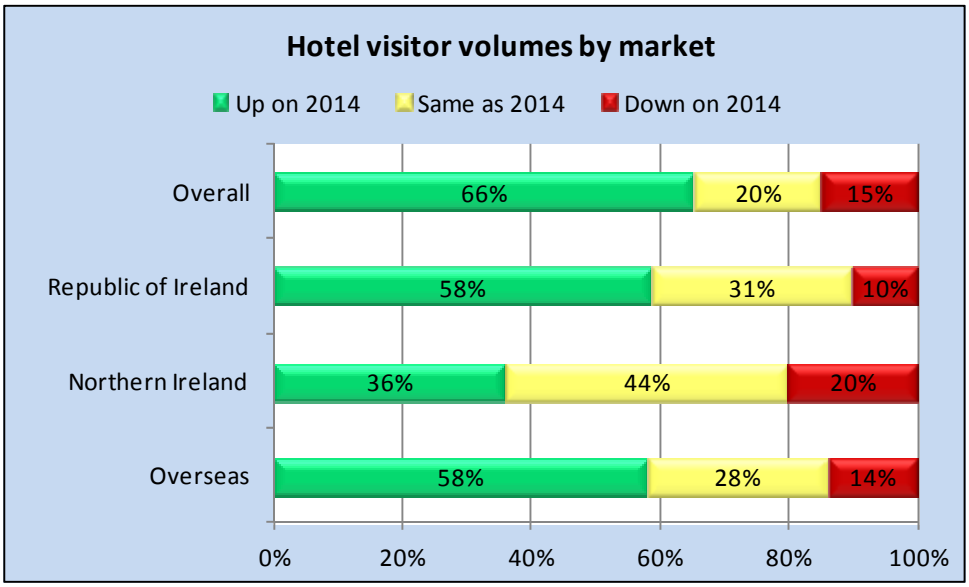
3.8 In particular, a high proportion (80%) of the hotel sector reports the expectation of an increase, as do 78% of hostels and 76% of attractions.

3.9 Around six in ten (61%) responding guesthouses and restaurants also expect to see a rise in visitor volumes during the remainder of 2015, as do more than half of self catering operators (53%) and B&Bs (52%).

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



Two thirds see overall increase

4.1 The year has started very well for hotels, two thirds (66%) report an overall increase in visitor volumes on the same period in 2014.

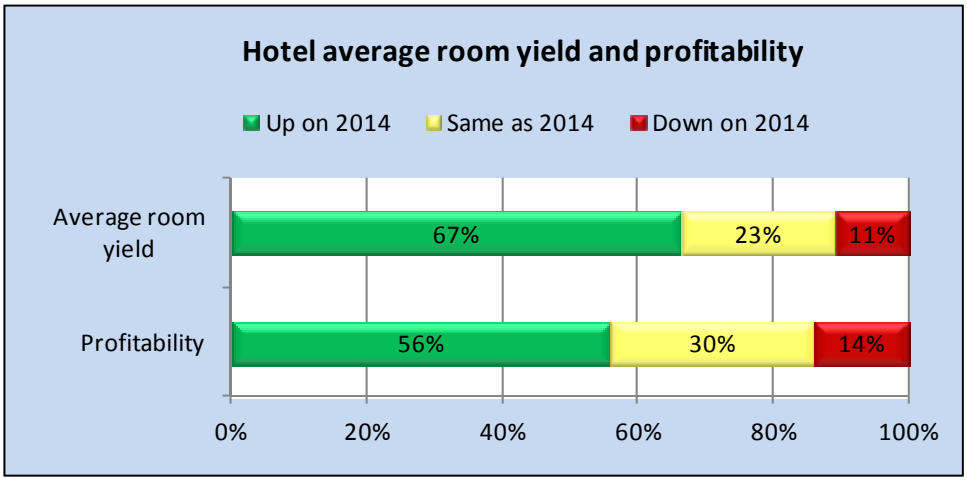
Strong domestic and overseas markets

4.2 Nearly six in ten (58%) of responding hotels report the domestic market and overseas market to be up on last year. The overseas market in particular has seen greater improvements compared to the same period in 2014, when at this point in the year 45% reported an increase.

Help from exchange rates and repeat visitors

4.3 Around three quarters (76%) of responding hotels cite the exchange rate as a positive factor this year, with 58% reporting an increase in overseas visitors. Repeat visitors are a positive factor for 75% of respondents.

Hotel average room yield and profitability



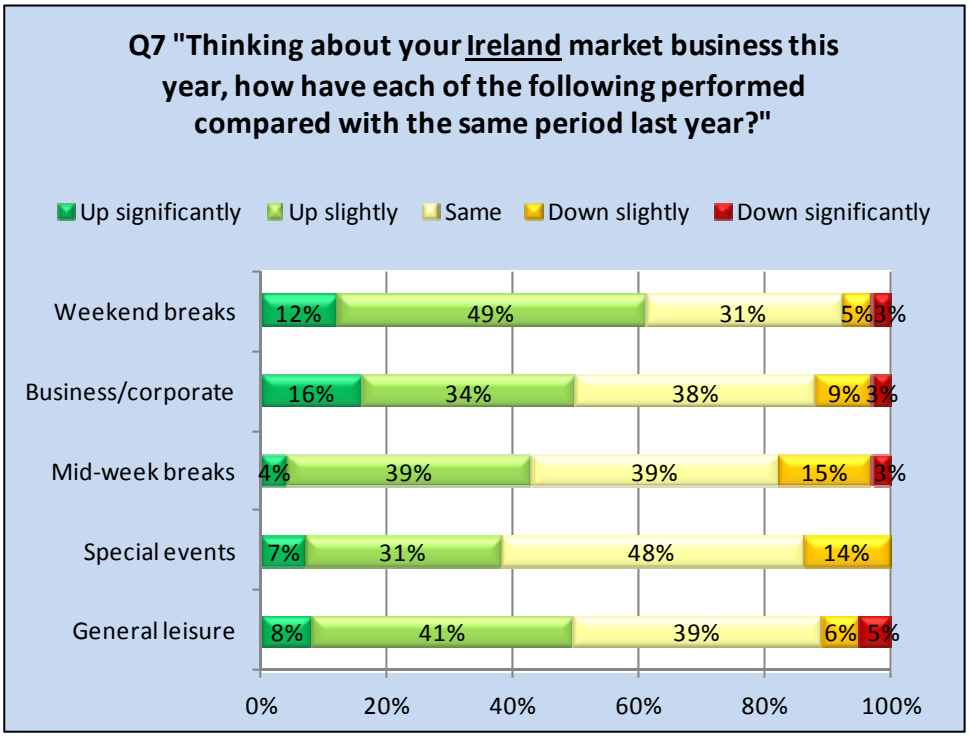
Profitability continues to rise

4.4 Hotels' average room yield and profitability continues to improve each year.

4.5 Two thirds (67%) of respondents report their average room yield to be up, and well over half (56%) report their profitability to have risen compared to the same period in 2014.

4.6 Just 14% report lower profitability, compared to 16% last year.

Hotel visitor types (Ireland market)



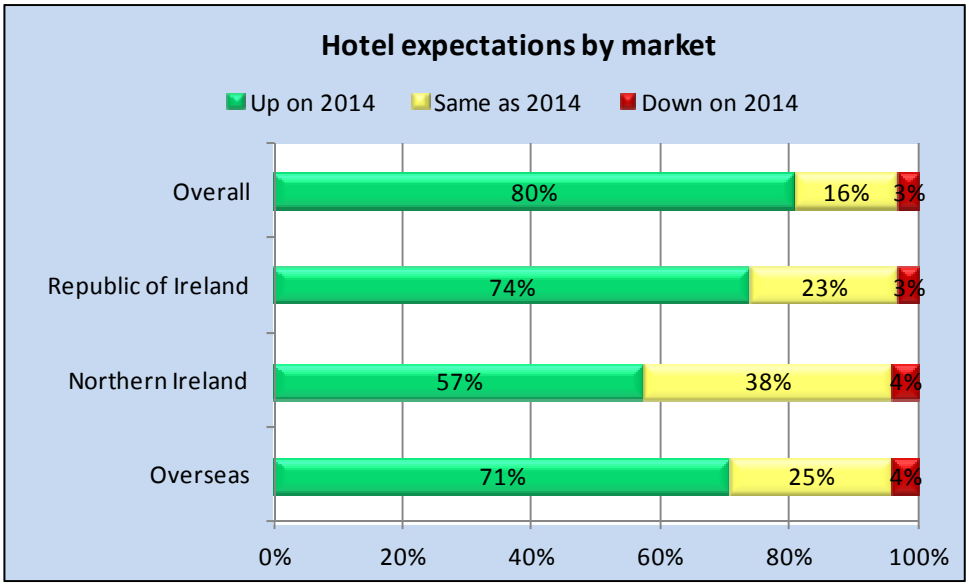
Good growth across all visitor types

4.7 Hotels' success this year is reflected in all visitor types. Weekend breaks, in particular, have seen excellent growth with half (49%) reporting to be up slightly on top of 12% of respondents who report to be up significantly.

4.8 Overall, half (50%) of responding hotels report business/corporate performance to be up, and a similar proportion (49%) report and increase in general leisure breaks.

4.9 Similar to last year, although there remains a large proportion of non-movement within each visitor type, any decreases are reported by a minority of respondents.

Hotel expectations



2015 predicted to be a very strong year

4.10 As shown in the above chart, expectations for the rest of 2015 are excellent. Overall, a strong majority (80%) predict volumes to be up on last year. The domestic market is set to fare very well, with three quarters (74%) of respondents expecting an increase.

4.11 Expectations for both the Northern Ireland market and overseas market are stronger than this time last year. Seven in ten (71%) predict an increase in visitor volumes from overseas compared to 56% last year.

4.12 Nearly six in ten (57%) predict an increase in the NI market compared to half (50%) last year, and just 4% expect to see smaller numbers from their northern neighbours.

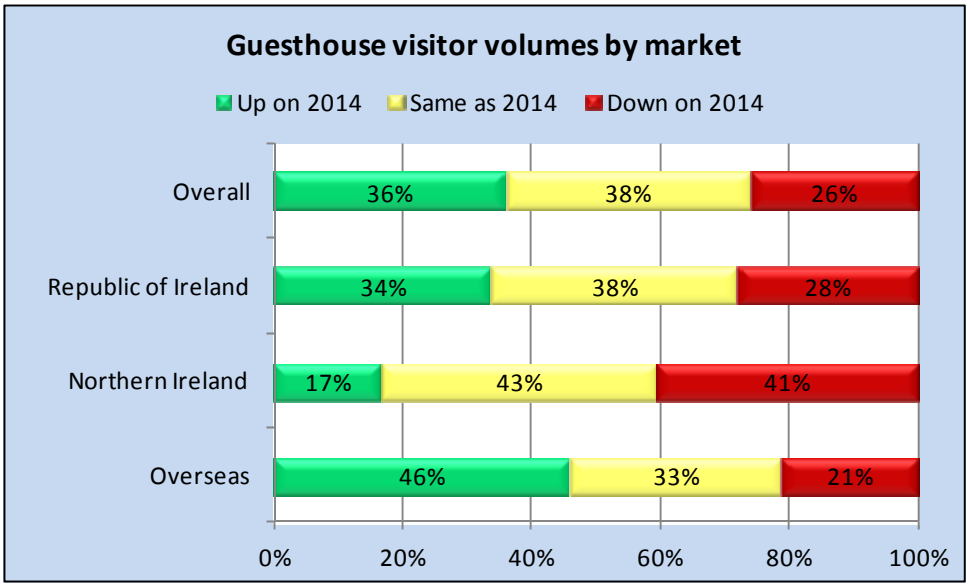
Good exchange rates to boost some overseas

4.13 With exchange rates in favour of American and British visitors, these two markets in particular are expected to be up. The British market is expected to be strong (72% predict an increase) as is the North American market (71%).

"There are favourable exchange rates in the USA and UK"
Hotel

5. Guesthouses

Guesthouse visitor volumes year to date



Slower growth for guesthouses

5.1 While not as strong as the booming hotel sector, guesthouses seem to be slowly putting some tough years behind them. Last year showed improvements for guesthouses in Ireland, and this year the gradual improvements continue for most markets.

5.2 Although two in five (41%) respondents report a decrease in visitor volumes from Northern Ireland market, other markets are showing signs of improvement, particularly from overseas visitors (46% report an increase).

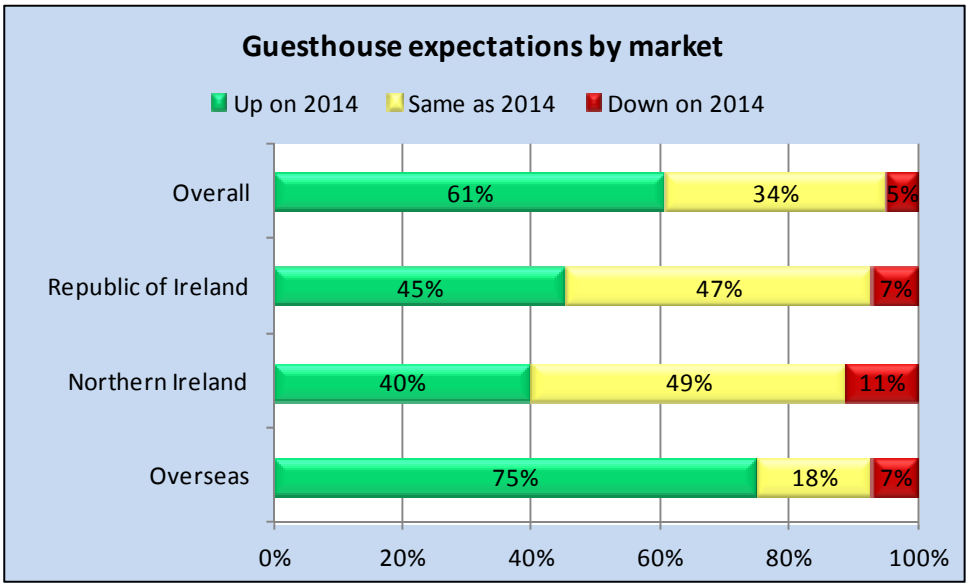
5.3 However, large proportions report visitor volumes in the first months of 2015 on a par to those experienced in the same period last year.

Exchange rate boosting trade for guesthouses

5.4 As with hotels, around three quarters (74%) of guesthouses report exchange rates as a positive factor, and are already drawing more British and American visitors.

"A main factor having a positive impact on business this year is the exchange rates for UK and North American travellers"
Guesthouse

Guesthouse expectations



Rest of 2015 set to improve

5.5 The year may have seen slow improvements, so far, but the rest of 2015 looks to fare much better – with great expectations of the overseas markets (75% of respondents predict an increase).

5.6 Overall, 61% of respondents predict stronger visitor volumes for the remainder of 2015 compared to the same period last year.

5.7 Guesthouses look to be in a much better position at this point in 2015, compared to reports at this time in 2014. There is an air of stronger positivity over the Northern Ireland market, which has jumped from 19% expecting an increase last year to 40% in this wave.

Local events help business

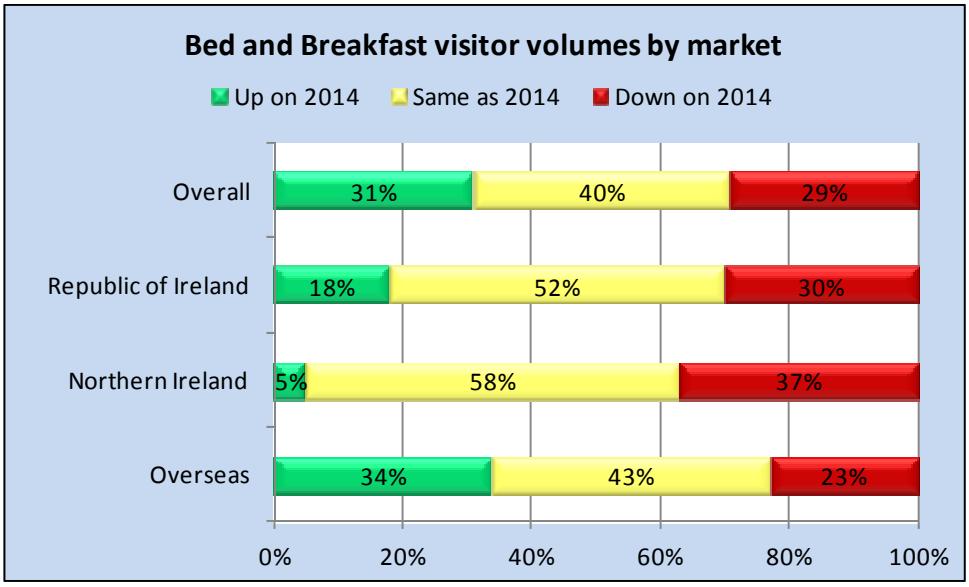
5.8 Guesthouse respondents are more likely to report local events as a positive factor, with 61% citing their importance compared to the 39% average.

Fuel and energy costs concerns guesthouses

5.9 While overall, the proportion of respondents reporting fuel and energy costs to be a concern stands at 45%, a higher percentage of guesthouses (57%) report this to be the case.

6. B&Bs

B&B visitor volumes year to date



Mixed results for B&Bs

6.1 Responding B&B operators report mixed results for 2015 so far. Overall, three in ten (31%) report an increase, and a similar proportion (29%) report a decrease in overall visitor volumes.

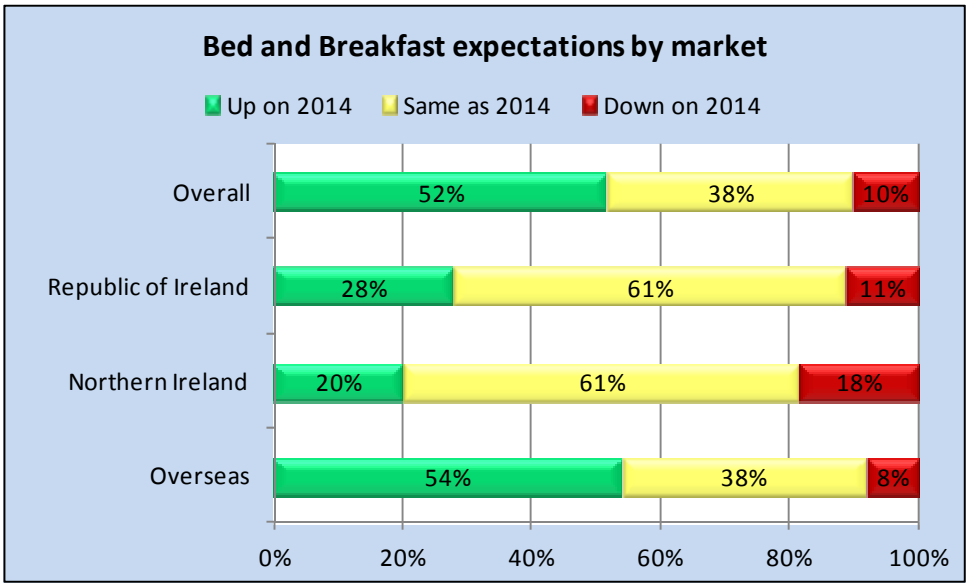
6.2 However, this is an improvement on this time last year, when 23% reported an increase and 43% reported lower volumes.

6.3 Visitor volumes from overseas are faring slightly better, with a third (34%) reporting to be up and 23% reporting to be down. Again, this is an improvement on 2014 when 25% reported an increase and 42% a decrease.

6.4 The Northern Ireland market continues to show the least amount of growth, with only 5% reporting an increase and 58% reporting levels similar to this time last year.

6.5 While the proportion of respondents reporting an increase in the domestic market (18%) remains the same as last year, the proportion reporting a decrease has dropped from 40% to 30%.

B&B expectations



Expectations rise for the rest of 2015

6.6 The improvements seen on last year take a step up when it comes to predictions for the remainder of the year. Around half (52%) of respondents expect to see an increase overall.

6.7 The overseas market fares the best, according to expectations, with 54% looking for an increase in volumes from overseas visitors.

6.8 Compared to this time last year, all markets are expected to have progressed positively. While six in ten (61%) expect volumes from both the domestic and Northern Ireland markets to remain steady, 28% expect the domestic market to see increases (compared to 22% last year) and 20% predict a rise in visitors from Northern Ireland (compared to 11% last year).

The Wild Atlantic Way factor

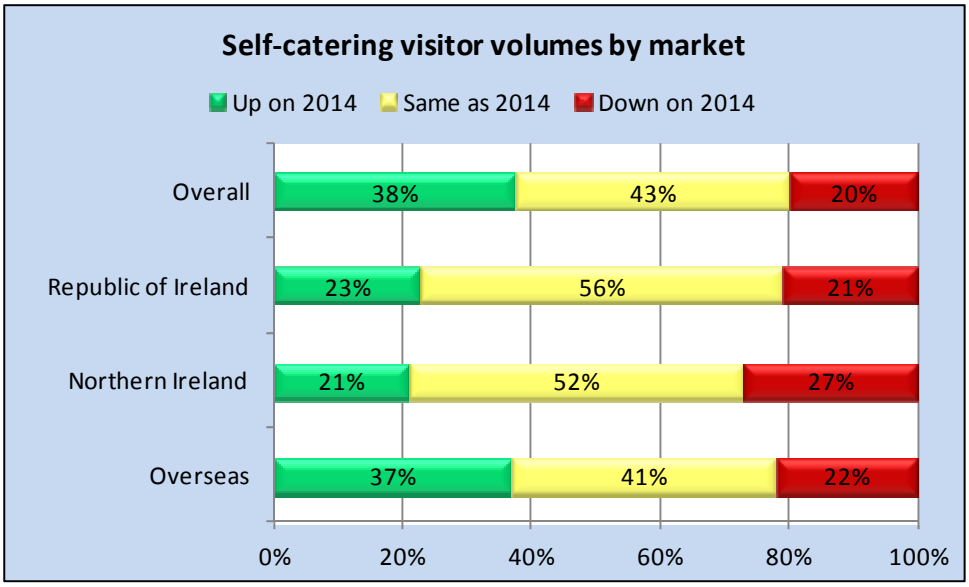
6.9 For many B&Bs along the west coast, the Wild Atlantic Way continues to boost trade and prompts praise.

"We are situated on the Wild Atlantic Way, and lots of tourists are driving this route"
B&B

"The Wild Atlantic Way has been a success and needs to be continued long term"
B&B

7. Self-catering

Self-catering visitor volumes year to date



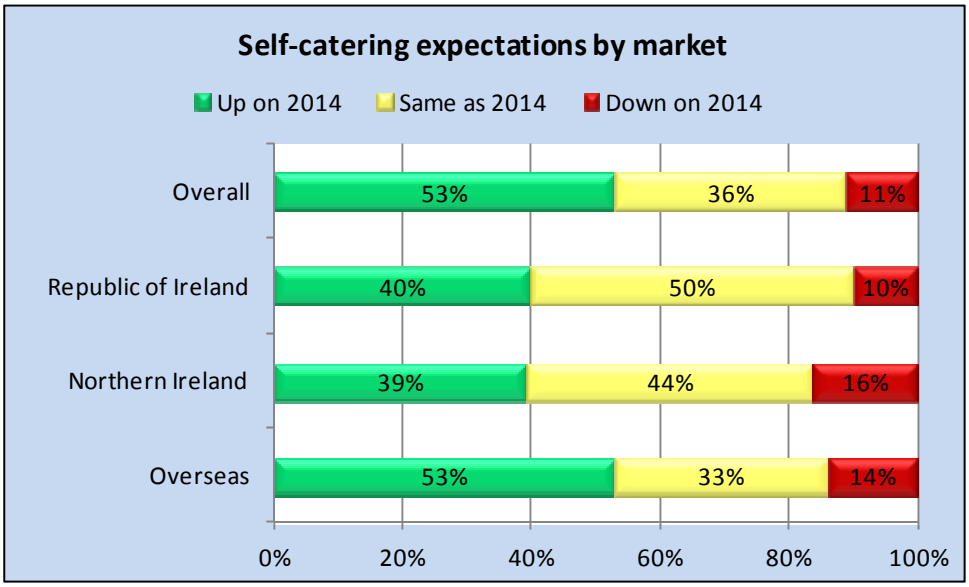
Mixed start for self catering

7.1 Self catering operators report mixed results for the first months of 2015. Overall, nearly one in five (38%) report an increase in visitor volumes while 20% report to be down.

7.2 Like other sectors, the overseas market has shown good signs of increase, with 37% reporting to be up.

7.3 Both the domestic and Northern Ireland markets remain largely steady, with over half (ROI 56%; NI 52%) reporting visitor volumes to be the same as 2015.

Self-catering expectations



Strong year expected for self catering sector

7.4 After a mixed start to the year, the self catering sector looks set for improvements during the rest of 2015. Overall, 53% of respondents expect to be up, and the same proportion (53%) expect the overseas market to increase (compared to 33% last year).

7.5 More than two in five expect volumes from Great Britain (45%), Germany (41%) and North America (42%) to be up.

7.6 While half (50%) expect visitor volumes from the domestic market to remain the same as the same period last year, 40% predict an increase.

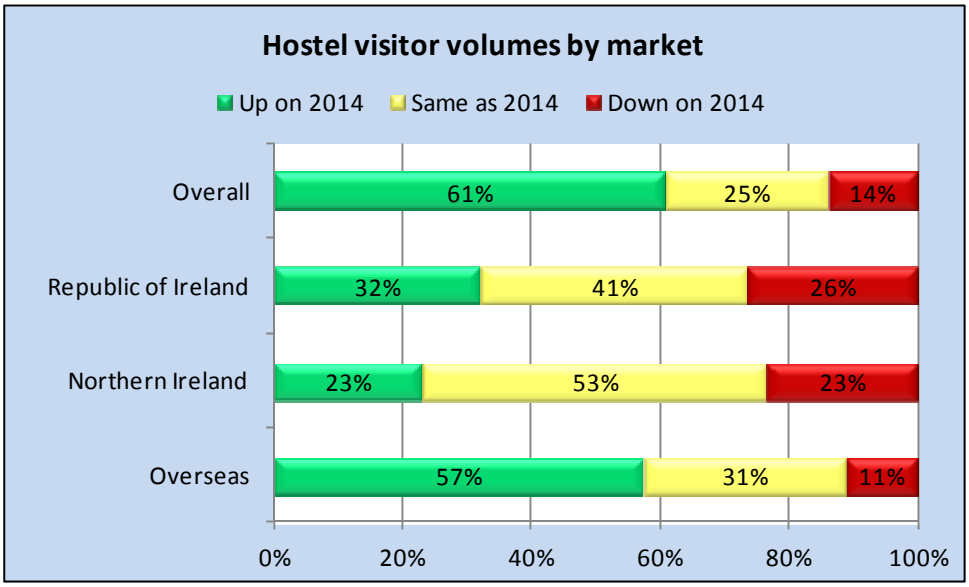
Repeat visitors a huge help for self catering

7.7 Around three quarters (74%) of self catering operators cite repeat visitors as a positive factor for their business.

"Repeat business is good"
Self catering

8. Hostels

Hostel visitor volumes year to date



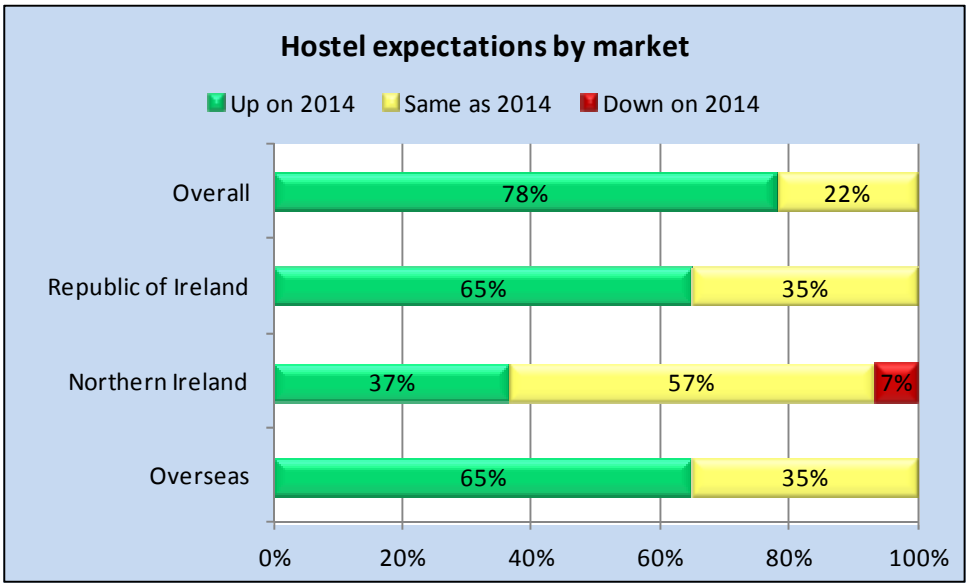
Booming year for hostels

8.1 Following closely behind hotels, hostels have enjoyed a strong start to the year, with six in ten (61%) reporting an increase in their overall visitor volumes.

8.2 The overseas market is faring particularly well, with 57% reporting to be up on last year. France has been a strong market in 2015 so far, with 52% of respondents reporting an increase in French visitors.

8.3 Two in five (41%) report steady visitor volumes in the domestic market, with a further third (32%) reporting an increase.

Hostel expectations



Strong improvements to continue for hostels

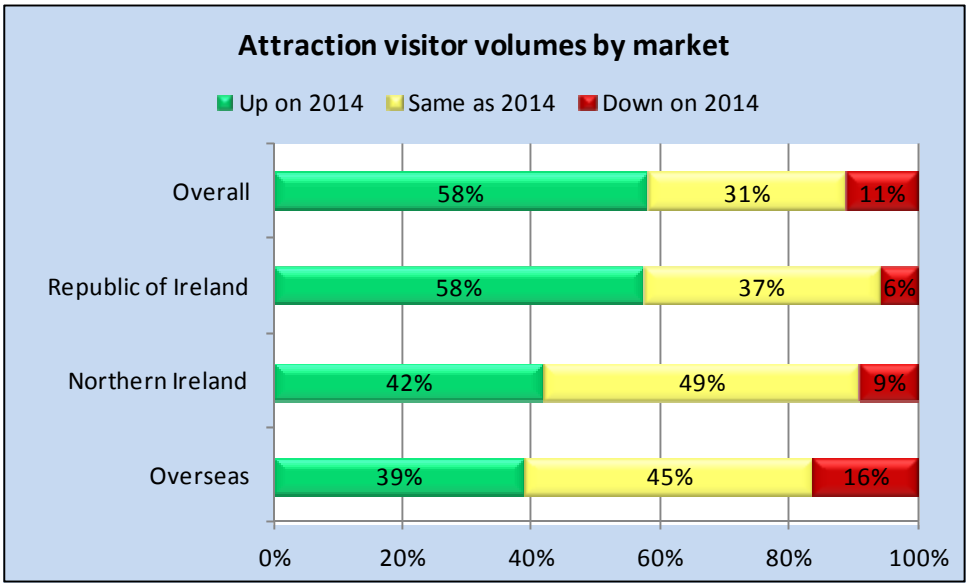
8.4 The rest of 2015 looks very promising for hostels, with a strong majority (78%) expecting to be up on the same period last year.

8.5 Like other sectors, the overseas market is expected to see increase for a large proportion (65%), with the same proportion reporting to predict a rise in their visitor volumes from Ireland. 62% cite an improved domestic economy as a positive factor.

8.6 Nearly two in five (37%) expect the Northern Ireland market to see an increase, with just 7% expecting to be down.

9. Attractions

Attraction visitor volume years to date

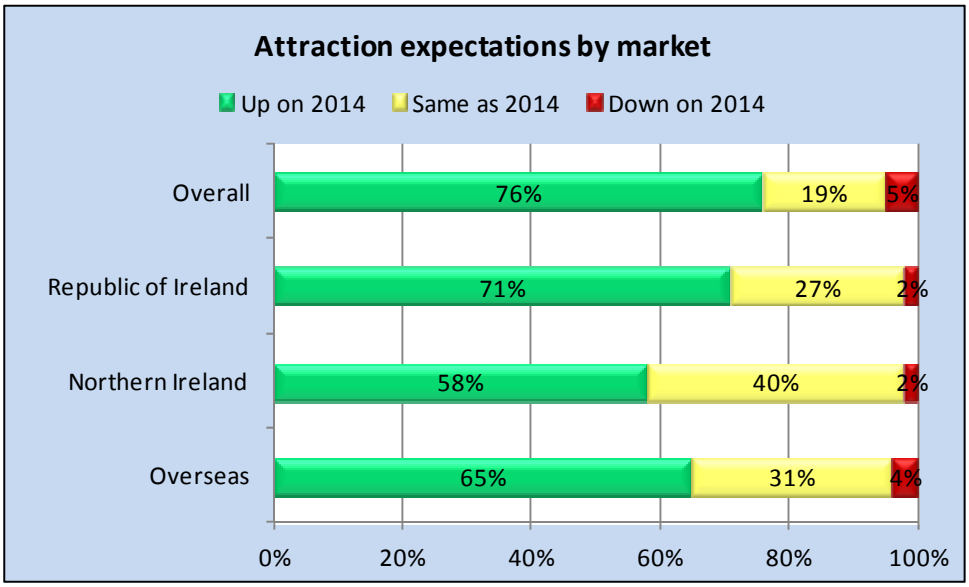


Good progress for attractions

9.1 Nearly six in ten (58%) respondents report being up on 2014, and the same proportion report an increase in their domestic market volumes.

9.2 Northern Ireland has also been a strong market for attractions, with 42% reporting an increase.

Attraction expectations



Strong year on the horizons

9.3 The rest of the year is set to fare even better, according to three quarters (76%) of respondents who predict visitor volumes to exceed those experienced in the same period in 2014.

9.4 For attractions, the domestic market is predicted to be strong in the coming months, with 71% expecting an increase.

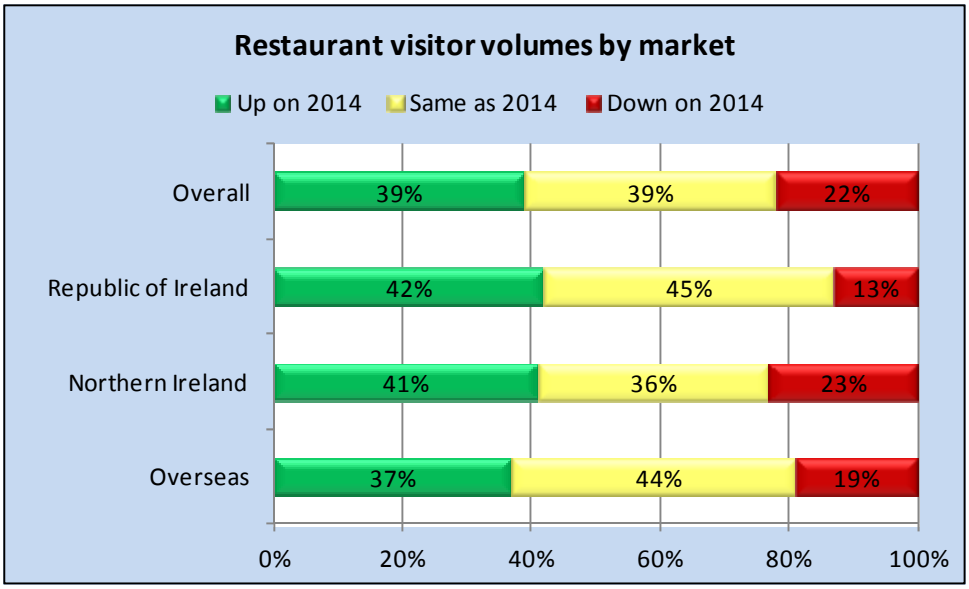
9.5 Two thirds (65%) predict higher volumes from overseas visitors, and 58% expect an increase in visitors from Northern Ireland.

Benefits from own marketing

9.6 Six in ten (61%) report own marketing to be a positive factor, and one that should help boost trade during the rest of the year.

10. Restaurants

Restaurant visitor volumes year to date



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

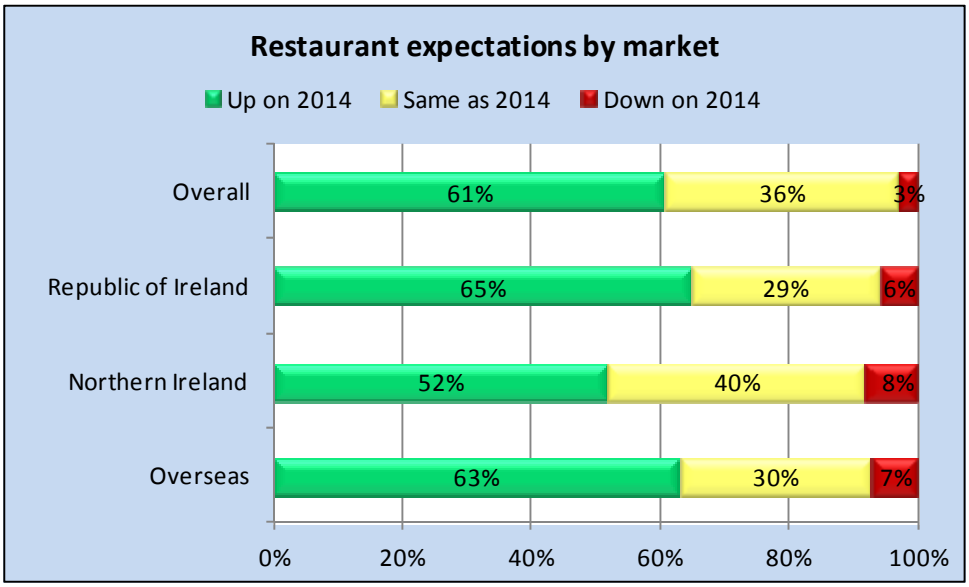
Steady start to the year

10.1 Restaurants have enjoyed steady growth in the first months of 2015, with two in five (39%) reporting an increase on the same period last year.

10.2 The domestic market is faring well, with 42% reporting to be up and just 13% reporting a decrease.

10.3 A similar proportion (41%) report the Northern Ireland market to be up, and 37% report an increase in overseas volumes. In particular, there has been an increase of British visitors in the first part of the year, according to 42% of respondents.

Restaurant expectations



Increase in covers expected

10.4 The restaurant sector looks bright for the rest of 2015, with six in ten (61%) predicting an overall increase and just 3% expecting to be down.

10.5 Visitor volumes from the domestic market should rise, according to 65% of responding restaurants. And around half (52%) also report expectations of increase within the Northern Ireland market.

10.6 Encouragingly, the overseas market is expected to grow for 63% of responding restaurants. As reported earlier, 42% of respondents have seen increase in the British market so far this year – this is expected to further improve during the remainder of the year with 70% predicting larger volumes from Great Britain.

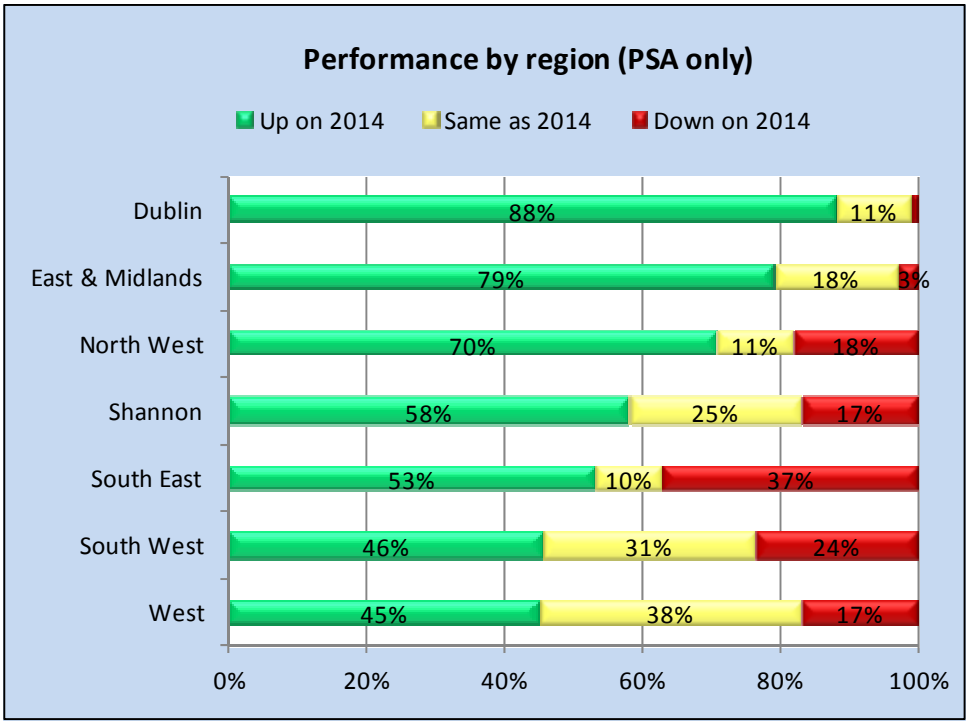
Improved domestic economy a big factor for restaurants

10.7 Around three quarters (73%) of respondents report the improved domestic economy to be a positive factor – well above the 47% average.

"People are starting to get a bit more confidence back when it comes to spending"
Restaurant

11. Performance by Region

Here we discuss the performance by region for the PSA sector



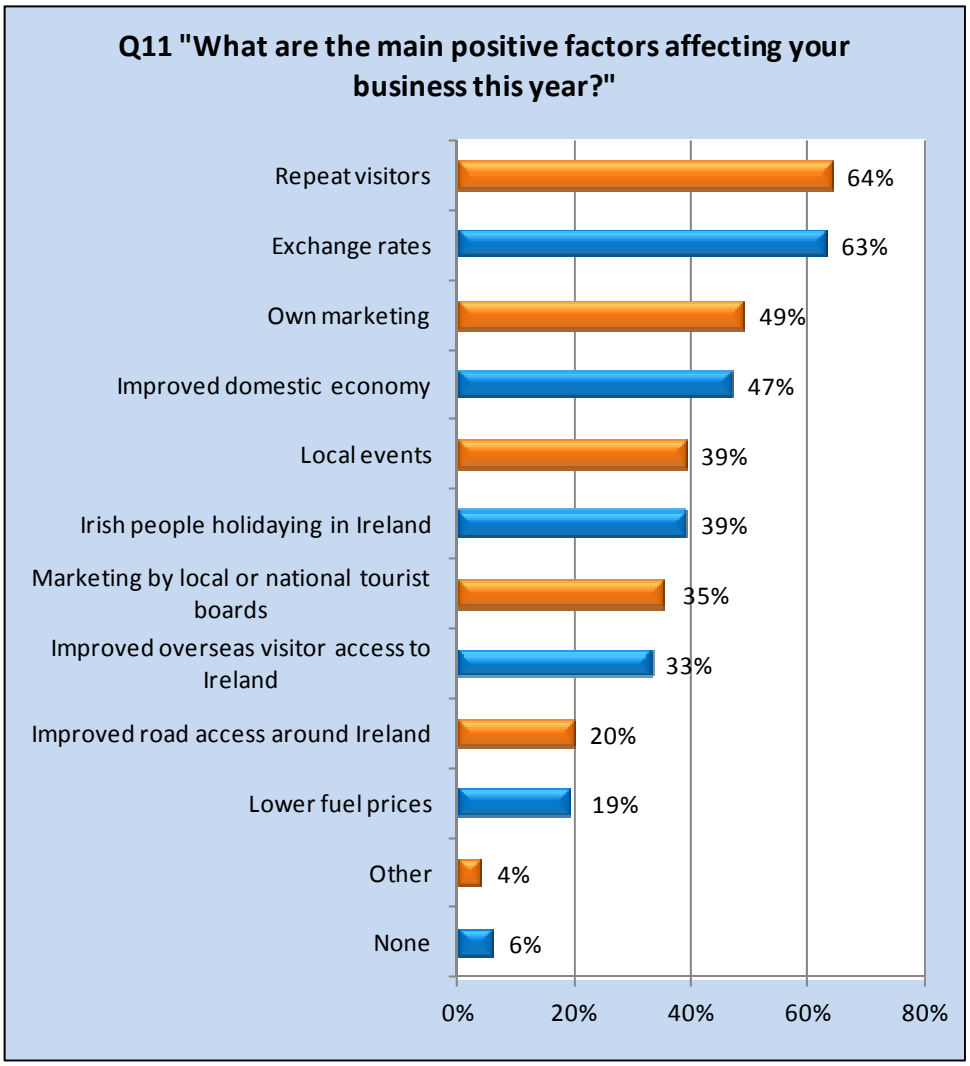
Strong performance in Dublin

11.1 The PSA sector in Dublin continues to see strong growth this year, with a large majority (88%) reporting an increase on the same period in 2014.

11.2 Four in five (79%) respondents in Ireland's East and Midlands have also reported larger visitor volumes, along with 70% from the North West.

11.3 Other regions of Ireland also report good levels of growth (Shannon 58%, South East 53%, South West 46%, West 45%).

12. Positive Factors in 2015



Repeat visitors stay in the top spot

12.1 Welcoming repeat visitors remains the most frequently mentioned (64%) positive for respondents this year. Three quarters (75%) of hotels and guesthouses cite returning customers as a positive, as do 74% of self catering operators and 69% of hostels.

"Lots of repeat visitors"
Guesthouse

"We're happy to see repeat business"
Self catering

12.2 A high proportion of respondents in the North West (74%), South East (72%) and East and Midlands (71%) mention repeat visitors as a positive factor affecting their business this year.

Economic factors help respondents

12.3 There are a number of fiscal-based positive factors mentioned by respondents. Included in this are exchange rates – particularly with Great Britain and North America - which are reported by 63% as being beneficial.

"The exchange rate is the big one"
Hostel

"The exchange rate means people are spending more money on food and drink and increasing stays"
Hotel

"There is a good exchange rate"
B&B

12.4 Nearly half (47%) report an improved domestic economy as positive. Through the open comments, there seems to be a feeling that Ireland's economy is continuing to gradually improve.

"There seems to be a general lift among people and not as much doom and gloom"
Restaurant

"We're expecting lots more confidence in the Irish market"
Guesthouse

"There is a general feel good feeling - people are more prepared to go on breaks and are not as cautious"
Attraction

"Attitude! The bottle is now half full rather than half empty. And the future looks brighter than it did..."
Hotel

12.5 As was the case in previous waves, some respondents mention the lower VAT rate as a positive factor as they continue to see the benefits. The reduced rate has allowed some respondents to invest in their business and improve the experience for their customers.

"The lower VAT level has enabled me to invest in our property. We need to keep this"
Hotel

"The reduced VAT rate. The continuation of this is vital to my business as I can stay competitive and attract more business"
Hotel

The Wild Atlantic Way remains a big draw

12.6 For many respondents along the West coast of Ireland, the success of the Wild Atlantic Way continues to be a much-appreciated positive factor as it draws visitors to the area.

"The Wild Atlantic Way has been FANTASTIC"
Hostel

"The Wild Atlantic Way is proving a very positive factor"
Hotel

"We are situated on the Wild Atlantic Way and lots of tourists are driving this route"
B&B

"The Wild Atlantic Way will be huge for business in my area"
Guesthouse

The mild weather has helped

12.7 The fair weather experienced at the start of 2015 has helped visitor volumes so far this year. Respondents' expectations of a warm summer have boosted the perception that the weather will have a positive effect on tourism business.

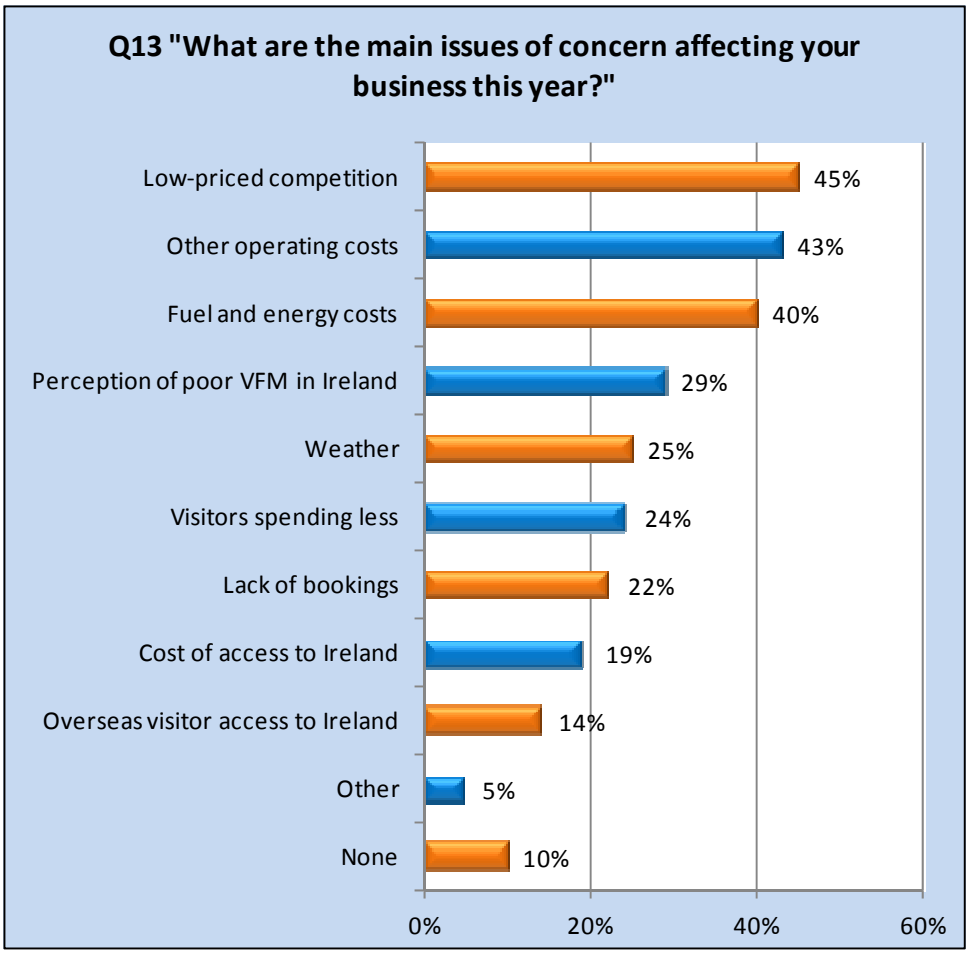
"If the weather is as good as last year it will be very positive I think and hope"
Hostel

"The good weather - people are getting out, walking and keeping fit"
Attraction

Business boosts from own marketing

12.8 Around half (49%) of respondents report that their own marketing has had a positive effect on their business. Own marketing benefits a higher proportion of hostels (67%) and attractions (61%).

13. Issues of Concern in 2015



Fuel and energy drop as a concern

13.1 After maintaining the top spot for years, fuel and energy woes have fallen to the third most frequently-mentioned issue of concern. The proportion of respondents citing it has dropped from 63% last year to 40% in this wave.

13.2 In comparison, other operating costs are mentioned by a similar proportion of respondents – 43% compared to 47% last year. However, some respondents who do cite costs as a concern, believe them to be a huge burden.

"Again like every year rates, rates, rates, rates, rates and if I haven't mentioned it already, rates"
Hostel

"Property tax and water rates are the last straw which forced us to put up our rates. I fear bookings are going to suffer"
Self catering

Low-priced competition most-mentioned, but by fewer

13.3 'Low-priced competition' sits at the top of the above chart with 45% reporting it to be an issue of concern. While the most mentioned, like with fuel and energy costs the proportion has dropped, falling from 61% last year.

14. Appendix 1 – Background and Methodology

Background and Objectives

14.1 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.

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

14.3 Fieldwork for this first wave in 2015 took place in May. The objectives were to measure:

- Business performance to date in 2015 in terms of visitor volume – overall and by key markets – and profitability
- Average room yield (hotels)
- Visitor volume expectations for the remainder of 2015
- Positive factors and issues of concern affecting business

Methodology

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

14.5 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.

14.6 Fáilte Ireland provided a database of 3,396 usable contacts (i.e. not opted out) for the survey spread across eight 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.

14.7 A total of 530 responses were received to the online survey – a response rate of 16%.

14.8 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

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

Sector	Online responses	Telephone top-ups	Total sample size
Hotels	101	17	118
Guesthouses	39	33	72
Bed & Breakfast	175	-	175
Self-catering	108	62	170
Hostels	23	16	39
Attractions	55	14	69
Restaurants	29	8	37
Total	**530**	**150**	**680**

Interviews for Contextual Background

14.10 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.