



Barometer Wave 2 – September 2020

FULL REPORT





Headlines (1)

Barometer Wave 2 – Sept

FULL REPORT



Reopening and operating capacity

- 61% of businesses have reopened since March and 39% have not
- 13% of open businesses are operating at full capacity
- 32% are operating at 50 – 99% capacity
- 55% are operating at less than 50% capacity
- This is important context when interpreting performance results below...

Summer performance

- 78% of businesses had fewer customers in July and August compared to a normal summer, and 11% have had the same level, but 11% have had more
- Results correlate with capacity:
 - ❑ 24% of those operating at full capacity have had more customers than normal this summer
 - ❑ This compares to 4% of those operating at less than 50% capacity



Headlines (2)

Barometer
Wave 2 – Sept

FULL REPORT



Most valued supports

- VAT reduction is the highest ranked demand generating support
- Employment Wage Subsidy Scheme is the highest ranked cost support
- If limited to one support, 42% would choose EWSS – far more than for any other support

Effects of tightened Covid-19 control measures

- 13% of businesses say they have ceased trading as a result of the tightened measures – although open comments show that this mostly applies to this year and not necessarily permanently
- A further 31% say their bookings are down 50% or more as a result

Sentiment

- Open comments illustrate the degree to which the industry is struggling, especially businesses which rely on overseas tourists and/or hosting events
- Full analysis by sector is included in the second half of this report

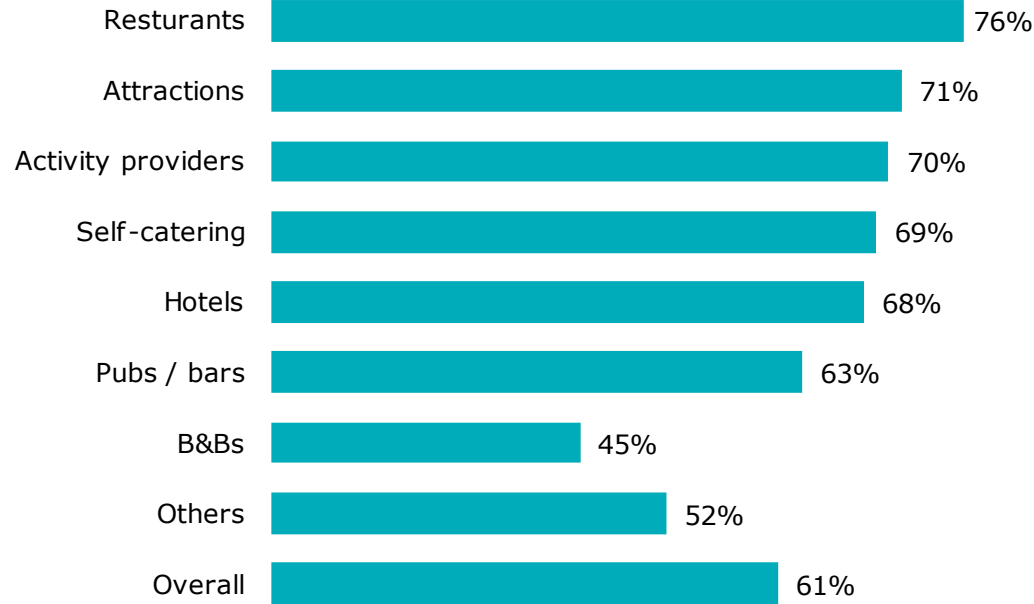


Barometer Wave 2 – Sept

FULL REPORT



Q10 "Has your business reopened since March?"



Base: 951

The chart shows answers for sectors with a substantial sample size (>30). Detail on other sectors can be viewed in the individual sector slides and the cross-tabs.

- 61% of businesses have reopened since March, and of those, almost all (98%) are still open
- Generally speaking, those reopening are less dependent on large groups and overseas tourists, and are more likely to capitalise on the domestic market
- 'Others' include for example coach operators, inbound tours and event organisers
- More detail can be found in the individual sector slides
- 14% of those open plan to close earlier than normal this year because of Covid-19



Barometer
Wave 2 – Sept

FULL REPORT



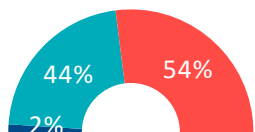
Employment levels and business supports



Employment levels

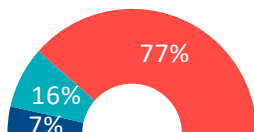
Barometer
Wave 2 – Sept

No. of staff employed this summer compared to summer 2019



Base: 736

Permanent staff



Base: 709

Seasonal staff

Graph Key

Up

Same

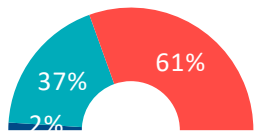
Down

- Comments show that EWSS – discussed later – has saved many jobs and businesses to date
- But in spite of this, employment levels in the industry are down, especially among seasonal staff
- The findings are reflected across all sectors, and the levels are down regardless of whether the business is open or not

FULL REPORT

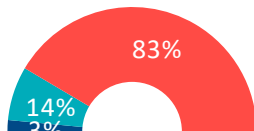


No. of staff to be employed this autumn/winter compared to same period last year



Base: 704

Permanent staff



Base: 643

Seasonal staff

Graph Key

Up

Same

Down

"Can't employ staff without EWSS [even though fewer employed] – income dramatically fallen"
Activity provider

The results have been re-based to businesses which employ each type of staff at the given time of year



Accessing finance

Barometer
Wave 2 – Sept

44% have
sought
finance

Base: 951

64% have
been
successful

Base: 414

- Coach operators in particular (11 out of 15) have sought finance to sustain their business over the last six months
- Other sectors with relatively high proportions of businesses seeking finance include golf clubs (67%), guesthouses (61%), hotels (59%), restaurants (59%) and pubs/bars (58%)
- These sectors particularly seeking finance are also relatively more likely to have been successful in obtaining it
- At the other end of the scale, only a minority (24%) of B&B and self-catering operators have successfully found finance if they have sought it
- 58% of those securing funding have received a government grant
- 20% of those unsuccessful have been told their sector is too high risk; other reasons include still awaiting a decision and not being eligible for the preferred support

"We have been fortunate to have received the restart grant and the restart grant plus."
Restaurant

"No grants for self-catering other than costs for Covid-19 related purchases"
Self-catering

FULL REPORT

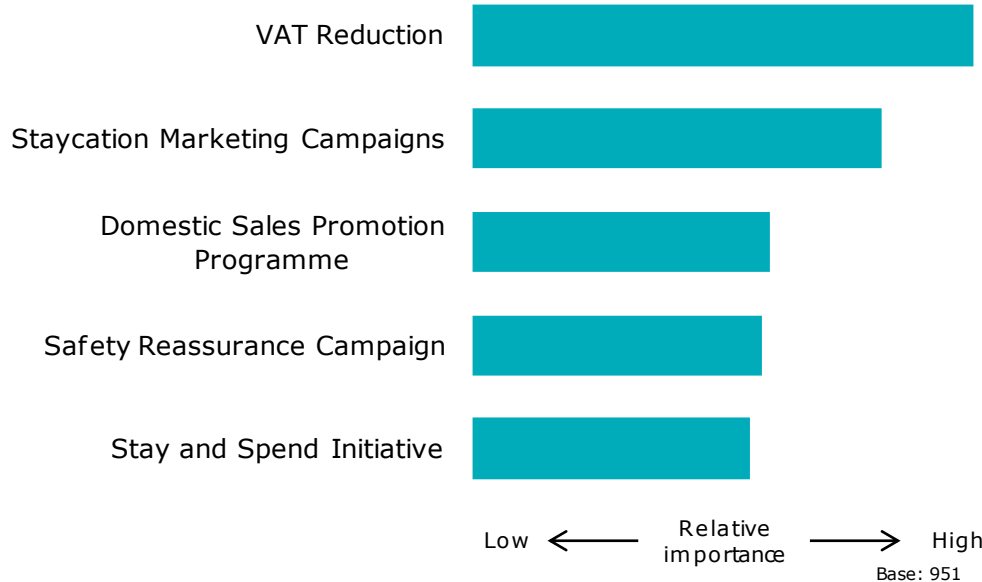




Demand generating supports

Barometer
Wave 2 – Sept

Relative importance of demand generating supports



Respondents have been asked to rank their top three priorities in order of importance. We have scored 3 points for each 1st place, 2 points for each second place and 1 point for each third place. The individual total scores do not mean anything in isolation – rather how they compare to each other relatively. The chart shows the relative importance of the supports.

- VAT reduction is the highest ranked demand generating support, although some businesses see it more as a 'profitability improving' support
- In times of reduced turnover, businesses feel that lower VAT would help to keep more revenue
- Others see the increased competitiveness price as essential
- Some see staycation marketing as essential during a time when overseas visitor numbers are vastly reduced

"As long as international tourism is not allowed, the domestic market is our only hope of survival, and only marketing campaigns will help."

B&B

FULL REPORT





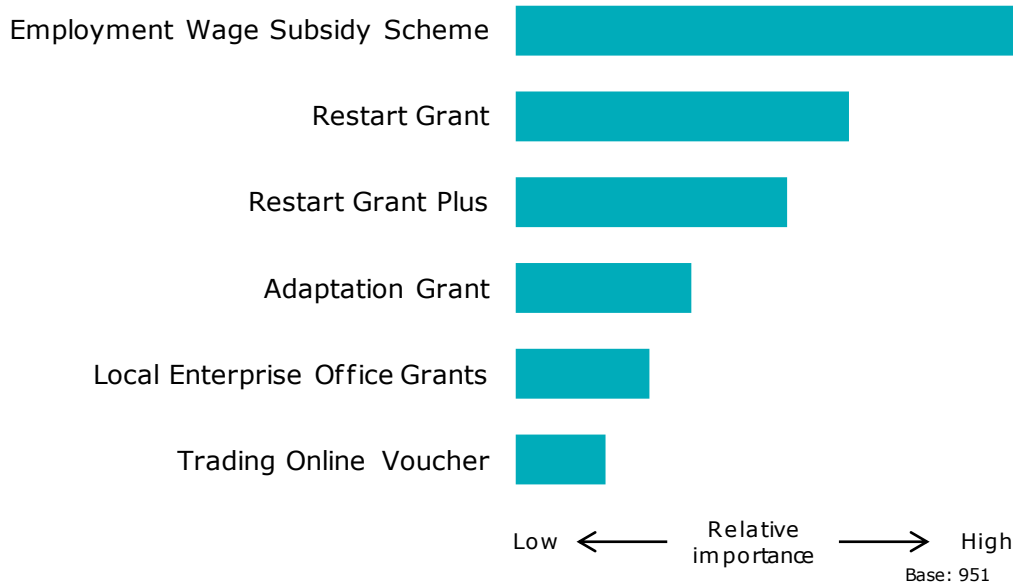
Cost supports

Barometer
Wave 2 – Sept

FULL REPORT



Relative importance of cost supports



Respondents have been asked to rank their top three priorities in order of importance. We have scored 3 points for each 1st place, 2 points for each second place and 1 point for each third place. The individual total scores do not mean anything in isolation – rather how they compare to each other relatively. The chart shows the relative importance of the supports.

- EWSS ranks first in importance
- Staff are the highest cost to many businesses – some also say their 'highest asset' too
- EWSS is allowing many businesses to stay open with reduced turnover
- Grants provide badly needed cash which does not have to be repaid (unlike loans)

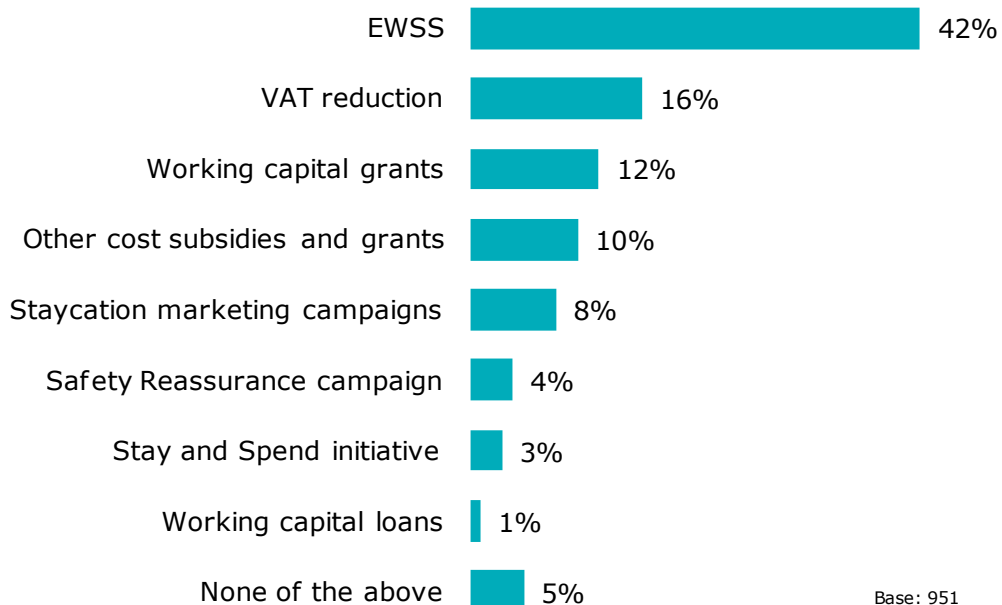
"Without wage subsidies, we will 100% close"
Hotel



Overall most valued support

Barometer
Wave 2 – Sept

Q17 "If you could avail of just one support, what would it be?"



- If limited to just one support, EWSS is clearly more valued than any other support
- Many say they would not be operating without it
- Grants are valued much more than loans because many do not know if they can repay a loan given the current crisis

"Without the EWSS, our wage cost would not be sustainable through a period where revenues have collapsed"
Hotel

Base: 951

FULL REPORT





Desired changes to current supports (1)

Barometer
Wave 2 – Sept

FULL REPORT



VAT reduction

- A VAT reduction to levels seen in previous years, or even lower, would be greatly appreciated

"Reduce the 13.5% VAT bracket down to 9% or lower"
Hostel

Wider eligibility

- Some operators who have invested much of their life into tourism feel they have fallen through the net of support, especially support which does not have to be repaid
- The most common reasons include:
 - ❑ Too old to be eligible
 - ❑ No business rates paid
 - ❑ Sole trader

"Recognise the role played by self employed over 65s"
Attraction

"Bed and breakfast businesses run out of family homes – not rateable premises so we are left out of almost every support available"
B&B

"Mirror supports that exist for limited companies to the self employed sector"
Inbound tour operator



Desired changes to current supports (2)

Barometer
Wave 2 – Sept

FULL REPORT

EWSS and TWSS

- The wage support schemes have been greatly appreciated on the whole
- There are some desired changes:
 - ❑ Payments at competitive levels compared to staying at home – otherwise hard to motive people back to work
 - ❑ Assessment based on a whole year's turnover
 - ❑ Sliding scale support if turnover reduction is less than 30%
 - ❑ Support to last until the spring – operators dependent on overseas visitors and/or large groups may well have minimal turnover until then

"We had a good summer 6 weeks which now leaves us exempt from new wage scheme – it should take the full year's turnover"
Hotel

"EWSS qualifying criteria. There could be a reduced support for those whose turnover is down 15-25%"
Hotel

"Continue the EWSS to the start of the 2021 season (end March 2021)"
Venue

"Extend the availability of the wage support. We will go bust at 23% reduction in turnover and still not qualify."
Attraction

"Extend the EWSS so that instead of getting 300 on the PUP to stay at home you got the same amount for working. Otherwise there is no incentive to work and it will actually damage the economy"
Attraction

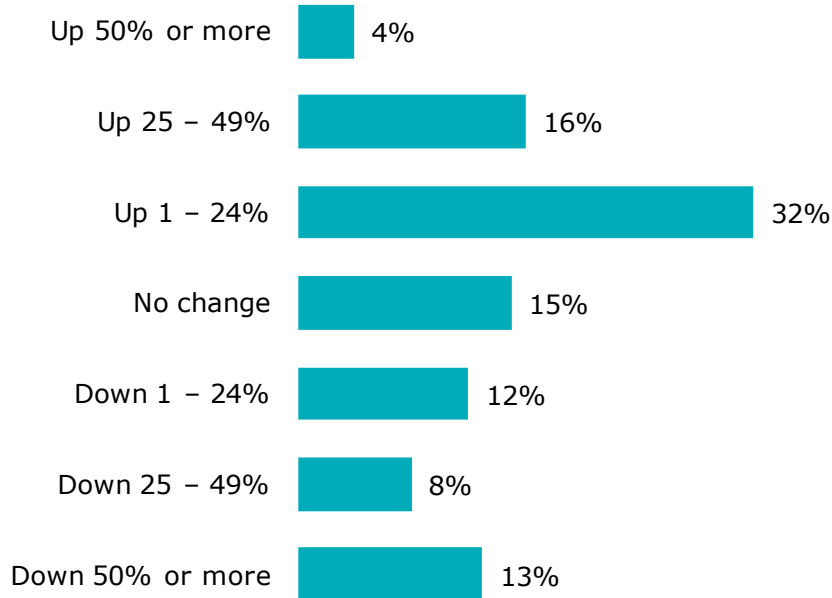




Changes in cost base

Barometer
Wave 2 – Sept

Q20 "What is your cost base compared to normal years?"



Base: 580

Q20 has been asked to businesses currently open

- The crisis has changed the cost base for most businesses
- But whether this is up or down, and to what degree, completely varies, even within a sector
- Results also still vary widely when operating capacity is controlled for

FULL REPORT





Barometer
Wave 2 – Sept

FULL REPORT



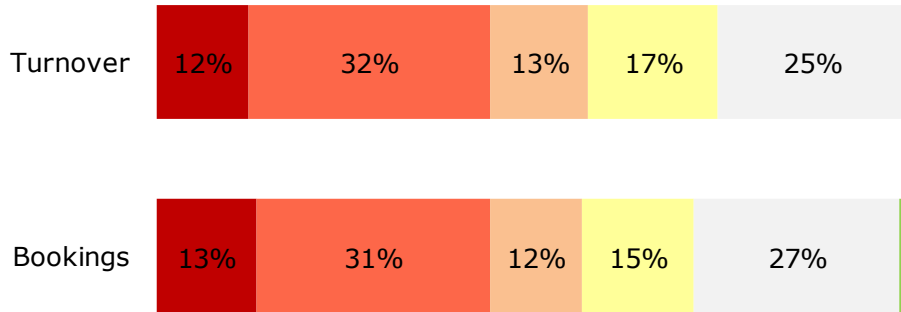
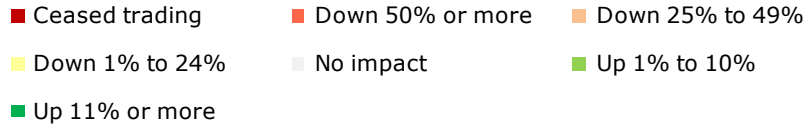
Performance and effects of control measures



Effects of tightened measures

Barometer
Wave 2 – Sept

Q21 "What has been the impact on your ... of the tightening of Covid-19 control measures?"



Base: 951

- The tightening of control measures on 18 August included stricter no. of people limits on gatherings and closing times for bars & restaurants
- 13% say they have ceased trading as a result, although comments suggest that in most cases, this applies only to 2020
- Some of those remaining open are vocal about why the people restrictions can't be tailored to size of premises

"Cut to wedding guest numbers has had a huge impact – do not understand why it cannot be allowed by sq ft per guest like in Northern Ireland"
Hotel

FULL REPORT





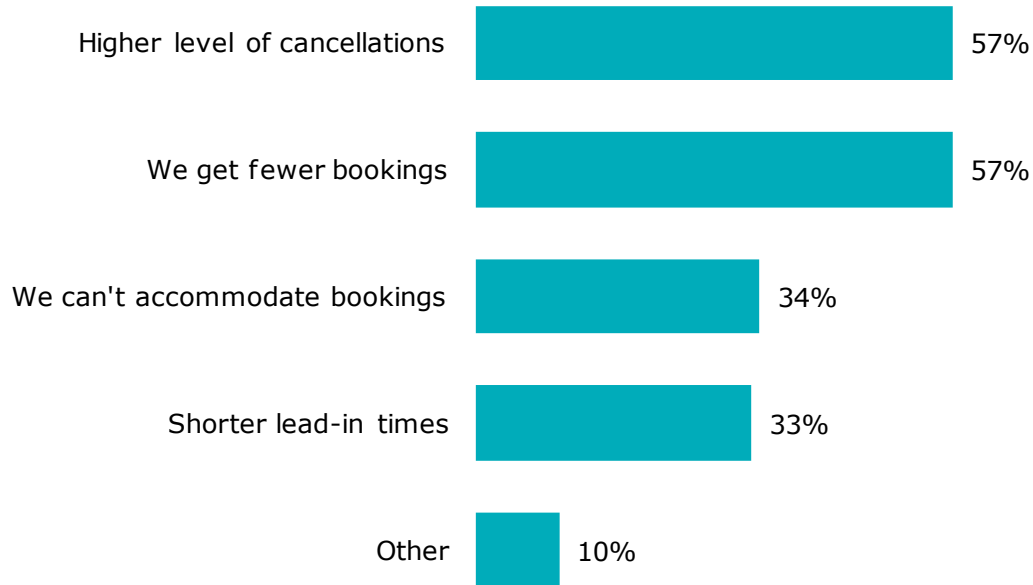
Effect of evolving control measures

Barometer
Wave 2 – Sept

FULL REPORT



Q22 (IF IMPACT) "How does the evolving nature of Covid-19 control measures impact on your bookings?"



Base: 698

Q22 has been asked to businesses seeing an impact in Q21 (previous slide)

- The turbulent nature of the pandemic and efforts to control it impact significantly on operators' bookings and ability to plan
- It is hard for operators to know who is coming more than a short time in advance, and how to prepare – the turbulence is felt across all sectors
- In a further question on planning, 37% of those seeing an impact say that staff rotas are being affected, and 23% say that lead-in times for ordering stock are affected

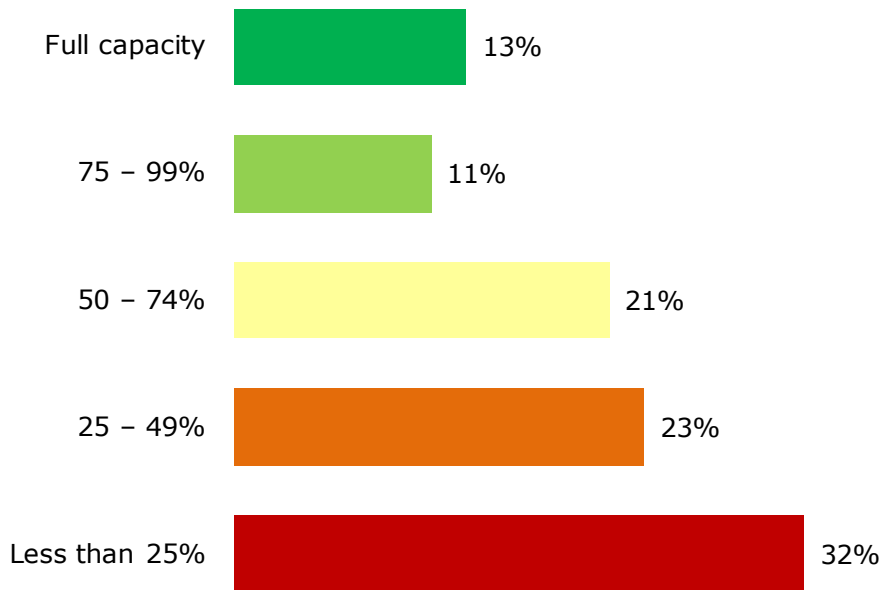
"Kildare in lockdown finished us off. Whatever bookings I had were all cancelled."
B&B



Operating capacity

Barometer
Wave 2 – Sept

Q24 "At what level of capacity is your business currently operating?"



- Although the majority of businesses are open, most are operating at reduced capacity, some greatly reduced
- This can affect their ability to fulfil demand, and is important context when viewing performance results overleaf...

Base: 570

Q24 has been asked to businesses which are currently open

FULL REPORT



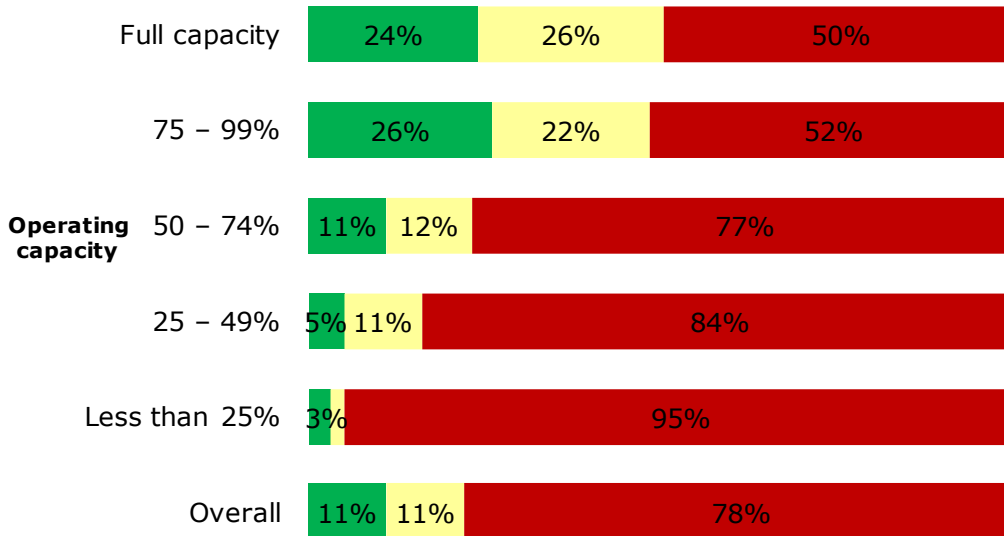


Summer booking levels – by capacity

Barometer
Wave 2 – Sept

Q25 "Compared to a normal summer, how many customers have you had in July and August this year?"

■ More than normal ■ Same as normal ■ Fewer than normal



Q25 has been asked to businesses which have reopened since March Base: 580

- Overall customer levels this summer have been very much down
- However, around half of businesses operating at 75%+ capacity have managed to either increase customer numbers or stay at a normal level
- Restricted capacity plays a big part in customer numbers being down
- Further details by sector can be viewed in the individual sector slides

FULL REPORT



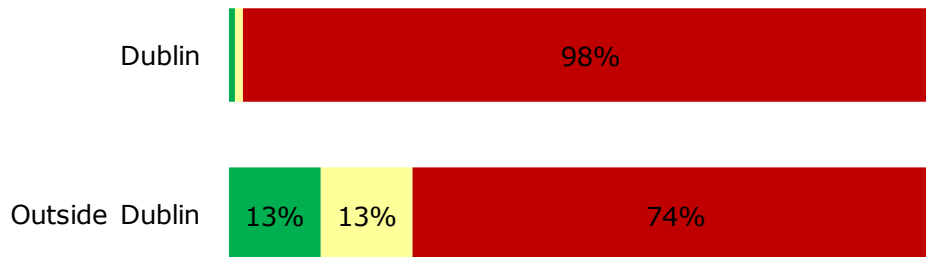


Summer booking levels – by region

Barometer
Wave 2 – Sept

Q25 "Compared to a normal summer, how many customers have you had in July and August this year?"

■ More than normal ■ Same as normal ■ Fewer than normal



Base: 580

Q25 has been asked to businesses which have reopened since March

"Impact on Dublin hotels is far greater. There is no overseas business. Domestic market is driven by theatre, exhibitions, sports events, festivals"
Hotel

- Dublin businesses have been hit particularly hard
- Dublin is particularly reliant on overseas tourists, and the loss has not been made up by the domestic market
- Comments show that with restrictions on events and the nature of the city's normal offering, it does not appeal to the domestic market currently
- Individual sample sizes for most counties are small for comparisons, but all are down on visitors on balance

FULL REPORT



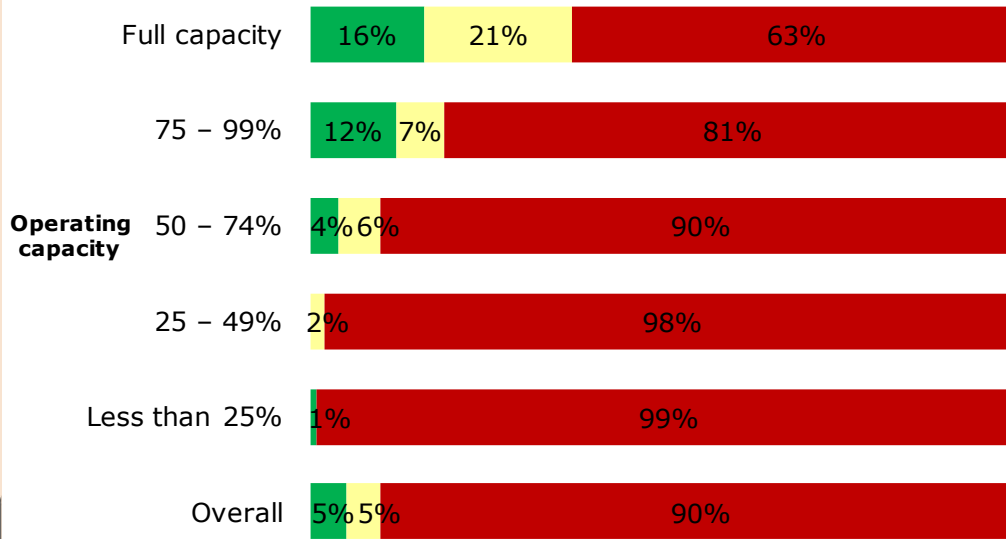


Autumn booking levels

Barometer
Wave 2 – Sept

Q26 "Compared to normal for this time of year, how many bookings do you have for this autumn?"

More than normal Same as normal Fewer than normal



Q26 results are for businesses which are currently open and take bookings Base: 512

- The outlook for the autumn is not positive
- To some extent, bookings could be down because of the shorter lead-in times (Q22) caused by uncertainty
- But comments also show that whereas domestic custom may have helped in July & August, keeping the domestic market going through the autumn is a different challenge

"Business will fall off a cliff next week"
Hotel

"With seniors being advised to stay at home, September is looking disastrous"
B&B

FULL REPORT





Barometer
Wave 2 – Sept

FULL REPORT



Analysis by individual sectors



Activity providers

Barometer Wave 2 – Sept

FULL REPORT

- 31% of open activity operators have had more customers this summer compared to normal – the highest of any sector
- This is in spite of only 9% operating at full capacity
- Buoyant domestic market has made up for the loss of overseas customers for some
- However, the outlook is not positive, and some (30%) haven't even reopened since March

"The bookings are up for August and September because everyone is trying to take a break before the summer ends"

"We are barely keeping the lights on, paying no wages, working to stay solvent and remaining in business in the face of loan repayments gathering on the horizon"

"Staycation has rescued some cash flow for July and August but won't be sufficient to sustain business to next spring"

Base: 64



Attractions

Barometer Wave 2 – Sept

FULL REPORT

- 22% of attractions outside Dublin have had more customers this summer compared to normal
- This compares to no attractions in Dublin, where 16 out of the 17 respondents have had fewer visitors
- Buoyant domestic market has made up for the loss of overseas customers for some, but not in Dublin
- Some say all their hopes lie in a continued strong domestic market, because their overseas business isn't returning soon
- The 'one size fits all' restrictions on no. of people are criticised by some with spacious premises

"The crisis has increased the number of visitors from Co Offaly"

"Footfall is simply not there. City attractions are not popular with staycationers compared to outdoor/rural/coastal ones"

"The one size fits all nature of numbers restrictions is not suitable for our business. We have a huge volume of space"

"Staycation campaigns & Covid-19 Charter have been very helpful. Thank you."

"From now on we will have very few domestic visitors ... as everyone has taken their holidays over the last 9 weeks. There may be a few couples knocking around and locals at the weekend."

Base: 127

Q27 "Do you have any other comments to make on how the Covid-19 crisis is affecting your business?"



Barometer Wave 2 – Sept

FULL REPORT

- Only 45% of B&Bs have reopened since March – the lowest proportion of any accommodation sector
- 52% of those open are operating at less than 25% capacity
- Reasons for remaining closed include not having enough bookings and not wanting visitors in their home
- B&Bs don't seem to have benefited from a buoyant domestic market like some other sectors have

"Covid 19 has closed our business because we are 70 and need to stay safe so sadly cannot allow people into our home"

"Very good mid July to August but fell off a cliff when schools went back as older people are nervous"

"The Irish do not want to stay in B&Bs. The main demand is for self-catering."

Base: 144



Caravan parks

Barometer
Wave 2 – Sept

FULL REPORT

- 7 of the 14 responding caravan parks have reopened since March
- The season is short, and being able to reopen for the whole of July made a big difference to those businesses which did
- Domestic tourism has rescued the summer season for some
- For others, domestic visitors have not made up for the loss of overseas tourists

"We were lucky that we could open in July. A month later and we would have been in serious trouble."

"No overseas business. All English business cancelled due to quarantine measures. Business costs are the same."

"Big change working with the home market"

"With no overseas tourists, no tents etc our income is down 75%"

Base: 14

Q27 "Do you have any other comments to make on how the Covid-19 crisis is affecting your business?"



Coach operators

Barometer Wave 2 – Sept

FULL REPORT

- Only 4 of the 15 responding coach operators have reopened since March
- All 4 are operating at less than 25% capacity
- This sector is one of the hardest hit as it is reliant on overseas tourists, group travel, and transporting people within a confined space
- Some do not expect any substantial business until spring 2021 at the earliest

"Our business is at a complete standstill with no plan for the transport sector. We employed 14 people who we selected and trained at a cost of €40,000. We don't know if those people will ever work for us again."

"Social distancing and restrictions on group gatherings are devastating for us ... people are afraid to travel in a coach."

"The coach tour operators' season only lasts for the summer season (6 months a year) so losing this summer means we will be out of work for 18 months. Realistically we won't see any work until next April and there is no guarantee of that either."

"Covid 19 has effectively closed our business since March, and we do not envisage any substantial revenue stream until Q2 in 2021."

Base: 15

Q27 "Do you have any other comments to make on how the Covid-19 crisis is affecting your business?"



Barometer Wave 2 – Sept

FULL REPORT

- 12 of the 15 responding DMCs are operating, but 10 of them at less than 25% capacity
- All have had fewer customers than normal this summer
- The impact of the crisis on DMCs is crippling, as the sector depends on overseas tourists, groups and in some cases business travellers (e.g. incentive trips)
- The survival of the sector depends significantly on rules regarding international travel and group gatherings, otherwise a vaccine

"Until international visitors can access Ireland without quarantine (or with testing) our business levels are down significantly"

"Business travel has completely ceased and will not return until there is a vaccine or some acceptable testing regime"

"The crisis has decimated our business overnight ... our audience is 100% international visitors"

Base: 15

Q27 "Do you have any other comments to make on how the Covid-19 crisis is affecting your business?"



Event / festival organisers

Barometer
Wave 2 – Sept

FULL REPORT

- 16 of the 30 responding event organisers are operating, but 14 of the 16 have had fewer customers this summer
- Events take time to plan – they don't just happen at short notice
- The new restrictions on numbers of people make it even harder for the sector to operate

"This will pass. We need to take responsibility for our actions and learn to live with this. We adapt and will try new things where we can."

"Business has completely dried up. All events have moved into Q2 2021 and beyond. Surviving until then is going to be a challenge and may not be possible."

"We will be unable to trade if restrictions remain at 6 and 15"

Base: 30

Q27 "Do you have any other comments to make on how the Covid-19 crisis is affecting your business?"



Barometer Wave 2 – Sept

FULL REPORT

- 12 of the 18 responding golf operators are open, but all at reduced capacity
- Golf clubs have customers, but the mix is different – loss of overseas visitors and large events
- Managing the bar and restaurant is a challenge in terms of ensuring distance and interpreting guidelines

"Mix is different. Steadier supply of business but unable to host the big events and occasions."

Base: 18



Barometer Wave 2 – Sept

FULL REPORT

- 14 of the 23 responding guesthouses are open
- However, 10 of the 14 are operating at less than 50% capacity
- Domestic tourism has helped some businesses, but lack of capacity makes it hard to cover costs

"General downturn (60 to 75%) in guest numbers because of no international travel. However I have to say that all our Irish guests this summer have been extremely cooperative, understanding and patient with the guidelines and safety in the guesthouse."

"The crisis has wiped out all forward bookings from September 1st onwards. This season was just 4 weeks in August at 50% capacity – not enough to survive"

Base: 23

Q27 "Do you have any other comments to make on how the Covid-19 crisis is affecting your business?"



Barometer Wave 2 – Sept

FULL REPORT

- 8 of the 15 responding hostels are open
- However, all are operating at less than 75% capacity, and all have had fewer customers than normal this summer
- The hostel sector is largely reliant on overseas tourists, and has not been able to make up the shortfall with domestic tourists
- Different locations pose different challenges – Dublin has a significant challenge of making up overseas shortfall with domestic tourists, whereas hostels in remote locations are dependent on other sectors being open

"Our business is in a small village in Mayo. There are no pubs / restaurants open. This affects our bookings."

"Only Irish guests are coming. The vast majority of guests in previous years were from abroad – 90% plus"

"It has prompted me to completely rethink my business model. I see no future for my hostel and am changing the model to self contained apartments and B&B"

"Staycations do not work for our business or Dublin in general. Not allowing travel from non green list countries has resulted in cancellations of 95%"

Base: 15



Barometer Wave 2 – Sept

FULL REPORT

- 68% of hotels are open – but of those, 53% are operating at less than 50% capacity
- 6% of open hotels have had more customers than normal this summer, 11% have had the same level, and 83% have had fewer
- All 26 responding Dublin hotels have had fewer customers than normal
- Many hotels usually rely on weddings, corporate events and family gatherings in the autumn
- Managers and employees are feeling the pressure, and customers don't always make it any easier

"Continuous stress on management, abuse from customers and wedding couples, inability to plan events and budget"

"Coming into the corporate season, the indoor restrictions are making it impossible to do business"

"Horrendous effect. Now we are open but cannot have more than 50 at a wedding, or 6 at a gathering. It makes it so difficult to attract or host any event or function."

"Dublin city centre occupancy in hotels has been decimated and there is very little short term prospect of this improving"

"Weddings, conferences, meetings, functions, communions/confirmations all wiped out"

Base: 204



Inbound tour operators

Barometer
Wave 2 – Sept

FULL REPORT

- 11 of the 24 inbound tour operators are open for business, but 10 of the 11 are operating at less than 25% capacity
- All have had fewer customers than normal this summer
- The survival of the sector depends on finding a way for overseas tourism to resume on a large scale
- In the meantime, grant support is needed – many operators have not qualified for grant schemes to date

"As an inbound tour operator with a virtual business that doesn't pay rates we have not qualified for any of the restart grants"

"We have gone from a turnover of €297,000 in 2019 to €2,000 in 2020"

"Until the quarantine is lifted we have no way to trade. Testing visitors on arrival would change this"

"Our business will not survive unless we find a way to accommodate inbound tourists"

"We need to be told either: a) we are going to be kept afloat with grants not loans or b) we should be told there is no support so we can tell our staff, close the business and get on with our lives"

Base: 24

Q27 "Do you have any other comments to make on how the Covid-19 crisis is affecting your business?"



Barometer Wave 2 – Sept

FULL REPORT

- 72% of pubs/bars serving food are open
- Some pubs have reinvented themselves, introducing food and/or reorganising their layout to meet guidelines
- Food revenue is generally ok for some, whereas bar trade is missed
- Trying to ensure customers adhere to guidelines is often stressful, and the attitude of some customers doesn't help
- The new restriction on no. of people is an additional challenge

"Customer satisfaction is down. People still want to book tables for more than 6 people, stay longer than 105 minutes and get angry with us when we strictly enforce the rules."

"If we have another lockdown, I'm throwing away the keys"

"Our biggest loss is the bar element of the business: functions, parties, busy nights, live entertainment, music sessions. The food element has held its own with domestic visitors... we are happy to be open and doing some trade"

Base: 43



Restaurants

Barometer
Wave 2 – Sept

FULL REPORT

- 76% of restaurants are open – at very varied levels of capacity
- 83% of open restaurants have had fewer customers this summer compared to normal
- Large group bookings are normally an important type of business for some
- Those in city centres relying on footfall no longer see it as much
- Changing guidelines and lack of awareness about mask wearing are challenging

"All group bookings, weddings, birthday parties etc cancelled. These were big part of our business"

"Empty offices, few shoppers, no students. Footfall overall down 60 percent"

"We are on our knees. Have adapted to survive. Don't know if we will. Thank you for adaptation grant – makes a big difference."

"It's really hard to keep going. I just want to lie down and not get up again."

Base: 46

Q27 "Do you have any other comments to make on how the Covid-19 crisis is affecting your business?"



Self-catering

Barometer Wave 2 – Sept

FULL REPORT

- 69% of self-catering operators have reopened since March
- 36% of those open are at full capacity – the highest proportion of any sector
- 9% of those open have had more customers than normal this summer, 40% have had the same level, and 51% have had fewer
- Self-catering has an advantage over most other accommodation sectors in that it is more self-contained
- However, the figures show the sector hasn't been able to fully take advantage of this
- Main reason is the reliance on overseas tourists – domestic market has helped fill gaps in July and August, but is not expected to off-peak

"Our off-peak bookings were primarily Europeans and Americans ... autumn and winter bookings have been drastically affected"

"July & Aug were fine with Irish families. Nothing forecast from Sept – Dec."

"International tourism was wiped out but replaced with the domestic market improving"

"French guests make up a very large portion of our business – all bookings from France were cancelled"

Base: 62

Q27 "Do you have any other comments to make on how the Covid-19 crisis is affecting your business?"



Tour guides

Barometer Wave 2 – Sept

FULL REPORT

- 7 of the 20 responding tour guides are operating – but 6 of them at less than 25% capacity
- All have had fewer customers than normal this summer
- Like other sectors heavily reliant on overseas tourists, this sector has been hit particularly hard
- Even 2021 business is now starting to look uncertain
- Some tour guides say they have fallen through the net of financial support

"No financial support anywhere. Worry for future if no tours in 2021 – what then?"

"Although I did no business this year I am still very hopeful that I can start up again by next March"

"Some tour guides work in guiding to supplement income from other areas and have lost out hugely ... no support for such workers who may have been dependent on the income ... as not seen as important if another lower paid job"

"Some cancellations re-booked for 2021 now begin to look shaky as well"

Base: 20

Q27 "Do you have any other comments to make on how the Covid-19 crisis is affecting your business?"



Barometer Wave 2 – Sept

FULL REPORT

- 5 of the 13 responding venues have reopened since March – 3 of them at less than 25% capacity
- The prospects for events, especially following the new restrictions, do not look good

"As a venue for events and classes, the outcome is bleak"

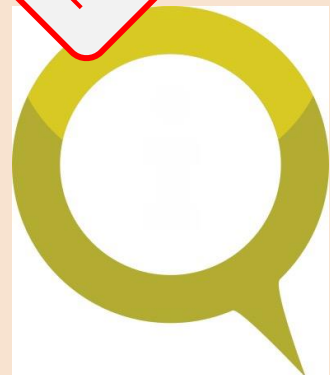
"Uncertainty about whether we will be able to open next year"

"Business has been decimated by 80%"

Base: 13



Appendix: Background & Methodology



Background and Objectives

The Irish tourism industry is facing an unprecedented challenge in 2020 as the Covid-19 pandemic sweeps across the world.

Travel restrictions and lockdown measures have stopped the industry in its tracks. Since the Government published its roadmap for reopening Ireland, Fáilte Ireland has been making every effort to support enterprises to reopen and recoup what they can in 2020 while adhering to official guidelines.

The purposes of this wide reaching survey is:

- To determine the current position of tourism businesses
- To assess what businesses need in the short term to allow them to trade efficiently and effectively in the coming months

Strategic Research and Insight (SRI), is an independent research agency working on behalf of Fáilte Ireland consulted in the questionnaire design, scripted the online survey and authored the report.

Methodology

A quantitative approach was taken and an online survey issued to relevant subscribers to Fáilte Ireland's ezine on 3rd September 2020.

An email was sent to most contacts on the Fáilte Ireland's Customer Relationship Management database containing a link to the online survey and an explanation of the survey objectives. Contacts such as public sector bodies and local authorities were excluded where possible due to the nature of the questions, employment in enterprises, business supports used, etc.

Fáilte Ireland and Strategic Research and Insight worked together to produce the questionnaire. The questionnaire was succinct (5-10 minutes to complete) to ensure a high completion.

A total of 951 responses have been received.

Sector	Total Sample Size
Hotels	204
Guesthouses	23
B&B	144
Self-catering	62
Hostels	15
Caravan & camping	14
Attractions	127
Activity provider	64
Golf	18
Restaurants	46
Pub / bar	43
Inbound tours	24
Event organiser	30
Coach operator	15
Other transport	32
Tour guide	20
DMC	15
Venue	13
Other	42
Total	951