INCOMING TOUR OPERATORS ASSOCIATION

Survey of Membership Business, 2015

prepared for the

INCOMING TOUR OPERATORS ASSOCIATION - IRELAND

by

CHL Consulting Company Ltd.

May, 2016

CHL CONSULTING Co. LTD.

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1. INTRODUCTION AND SURVEY STRUCTURE

CHL Consulting Company Ltd. was commissioned by the ITOA to conduct a survey of its members with regard to their business activities in 2015. This is the eleventh consecutive year in which this survey has been conducted.

The purpose of the survey is to gather information on the nature, scale and scope of the business operations of ITOA members. The findings of the survey are intended to provide an increased understanding of the tour operating business for the ITOA and its membership, and to communicate to other stakeholders the value of ITOA membersô contribution to Irish tourism.

Incoming Tour Operators Association
Survey of Membership Business, 2015
- *Report Highlights* -

- The total gross turnover for the 30 ITOA members in 2015 amounted to **€294.2 million,** representing an increase of 14.1% over the 2014 figure of ú257.8 million.

  - Based on gross turnover, the **average yield per tourist,** excluding cruise excursions, amounted to ú728.
  - The value of **total purchasing** from Irish suppliers in 2015 amounted to ú215 million, an increase of 15% on the 2014 figure of ú186.6 million.
  - **ITOA members handled a total of 493,750 tourists in 2015.** This represented a 5.3% increase on the 2014 figure of 468,734 and a 5.9% increase on the 2013 figure of 466,451.
  - Tourists generated by ITOA members make a very valuable **economic contribution** spending ú510 million when holidaying in Ireland in 2015.
  - In terms of the distribution of **leisure visitors by source market,** the 4 largest markets of North America, France, Germany/Austria and Britain account for 96% of the total.
  - **Group and coach tours and FIT** combined accounted for the largest share of turnover at 81% in 2015, marginally down from 82% in 2014.
  - Total **marketing spend** remained at similar levels to 2014 at ú8 million, an increase of 12% over 2013. ITOA members collectively invest the equivalent of 20% of Tourism Irelandõs total annual international marketing spend.
  - With regard to the **regional distribution of business**, Dublin accounted for 38% of total turnover in 2015, in line with that recorded in 2014. The balance (62%) of ITOA membersô business was distributed throughout the regions.
  - A total of 2,302 **man-days** were spent travelling overseas in 2015 to promote Ireland, up from 2,188 man-days in 2014.

A1. ECONOMIC CONTRIBUTION

It is evident that the tourists generated by ITOA members make a very valuable contribution to the Irish economy. As shown in Table 1, this contribution is estimated at almost ú508 million in 2015. Based on provisional estimates for 2015, the share of total national receipts from overseas tourists generated by ITOA members, excluding carrier receipts, was a little over 12%. This is consistent with the finding that the ITOA members accounted for around 11% of promotable tourists visiting the Island of Ireland in 2015.

Table 1: Expenditure by Overseas Tourists Generated by ITOA Members, 2015

Business Type	€
Leisure tourists	415.5
Business tourists	84.1
Excursions	8.0
Total	**507.6**

The overall contribution to the national tourism industry made by the tourists handled by ITOA members is substantially greater than the gross revenue of the tour operators. Based on the breakdown of touristsô expenditure in Ireland in 2014, published by Fáilte Ireland (Tourism Facts 2014), it is estimated that the gross revenue for holiday visitors handled by ITOA members represents almost two-thirds of their total expenditure in Ireland (excluding carrier receipts). It is assumed that the tour operatorsô gross revenue includes 100% of the cost of bed and board and internal transport, and two-thirds of the cost of other food and sightseeing. As shown in Table 2 below, this leaves a balance of 29% of their customersô expenditure unaccounted for in the ITOAôs gross turnover figures. This balance is spent on other meals, sightseeing, shopping and miscellaneous items.

Table 2: Breakdown of Tourists' Expenditure (%)

Item	All Tourists	Incl. in ITOA Revenue	% Additional to ITOA Revenue	Net Addition to ITOA Revenue
Bed & Board	31%	100%	0%	0%
Other Food	34%	67%	33%	11%
Sightseeing	7%	67%	33%	2%
Internal Transport	13%	100%	0%	0%
Shopping	14%	0%	100%	14%
Miscellaneous	2%	0%	100%	2%
Total	**100%**			**29%**

Source: Fáilte Ireland (Tourism Facts, 2014) and survey results

The total gross revenue earned by ITOA members from leisure tourists in 2015 amounted to ú295 million. If this represents 71% of the total expenditure in Ireland by these tourists, then that total can be estimated at ú415.5 million. To this can be added expenditure estimates for business tourists and day excursions handled by ITOA members. The former is based on an average per head estimate for business tourists of ú1,400.[1] The estimate for day excursions is based on the revenue figures reported by ITOA members grossed up to cover shopping, other food and miscellaneous items. Taking these sources together, it is estimated that tourists handled by ITOA members spent almost ú508 million in Ireland in 2015, broken down as per Table 1 above.

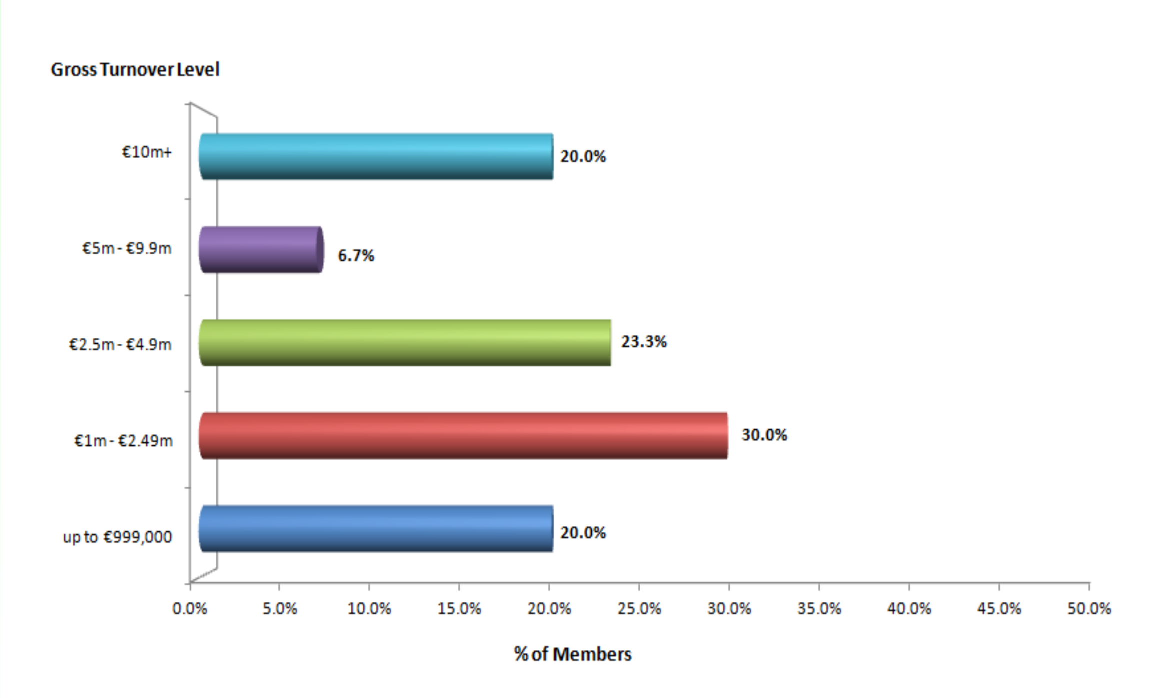
[1] Fáilte Ireland

Q3. What was your gross turnover in 2015, including VAT?

The total gross turnover for the 30 ITOA members in 2015 amounted to **€294.2 million,** representing an increase of 14.1% over the 2014 figure of ú257.8 million. Over a quarter of members have a turnover in excess of ú5 million, in line with 2014 trends.

Based on gross turnover, the average yield per tourist, excluding cruise excursions, amounted to ú728 in 2015, an increase of 12% on the 2014 figure of ú650.

Distribution of Membership by Gross Turnover Level



Q3b: What was the value of your total purchasing from Irish suppliers in 2015?

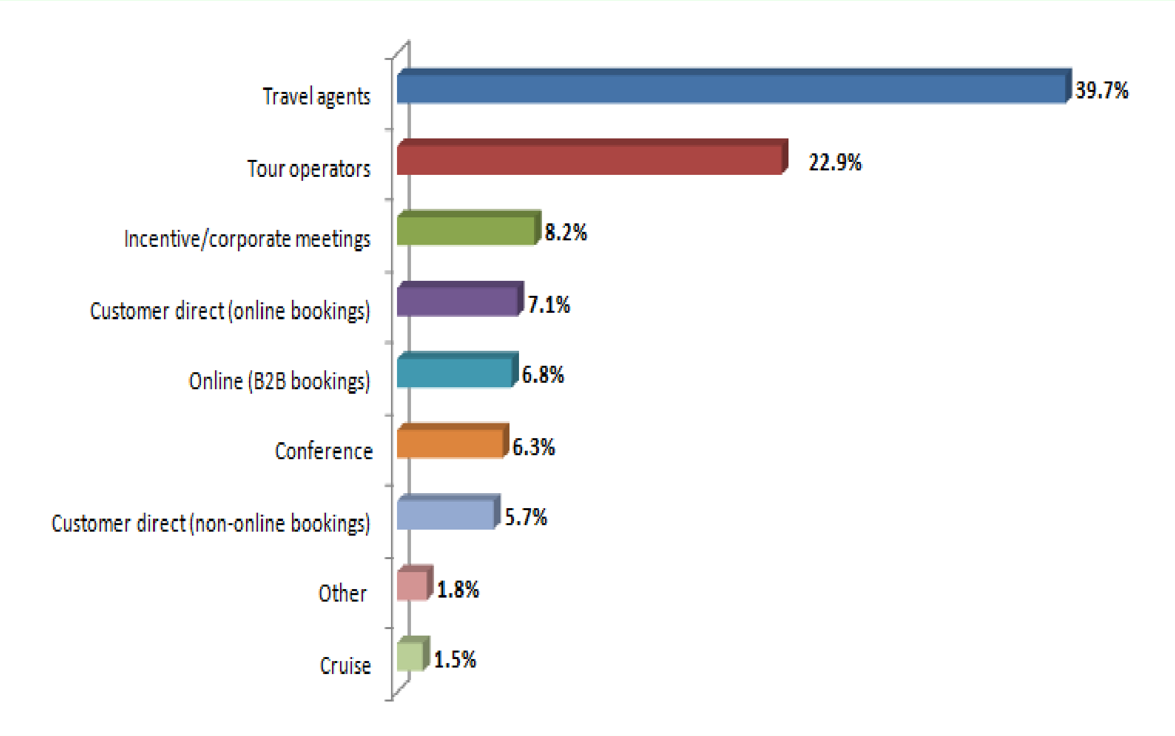
2015: 29 respondents replied to this question

The total value of purchasing from Irish suppliers by ITOA members in 2015 was **€214.6 million**, an increase of 15% on the 2014 figure of ú186.6 million.

Q4. What was the percentage distribution of your turnover by business channel?

2015: 30 respondents replied to this question

	2015
Travel agents	39.7%
Tour operators	22.9%
Incentive /corporate meetings	8.2%
Customer direct *(online bookings)*	7.1%
Online *(B2B bookings)*	6.8%
Conference	6.3%
Customer direct *(non-online bookings)*	5.7%
Other	1.8%
Cruise	1.5%

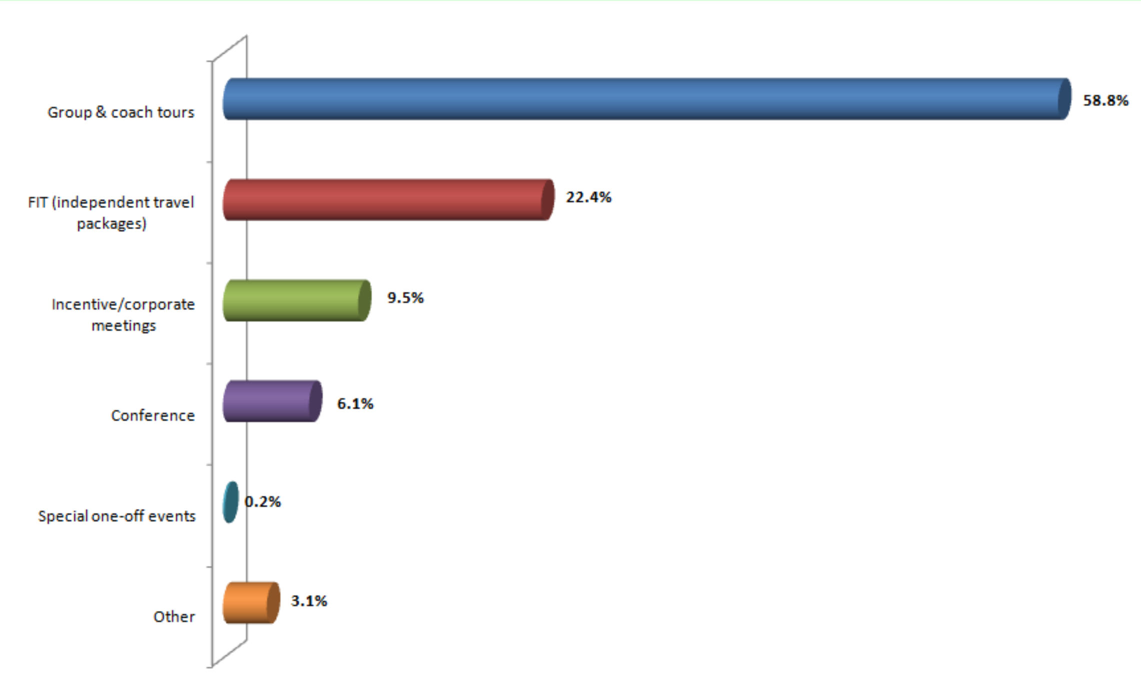


The share of business sourced through the leisure travel trade accounted for 63% of membersô turnover in 2015. Direct bookings from customers saw a decrease of 1.0%, down from a 13.9% share in 2014 to 12.8% in 2015. The share of business sourced through conferences and incentive/corporate meetings rose by 1.9% and 1.0% respectively in 2015.

Q5. What percentage of your turnover came from the following product categories in 2015?

2015: 30 respondents replied to this question

	2015
Group & coach tours	58.8%
FIT *(independent travel packages)*	22.4%
Incentive /corporate meetings	9.5%
Conference	6.1%
Other	3.1%
Special one-off events	0.2%



Similar to previous years, group and coach tours continue to account for the largest share of turnover. Most notably, both the incentive/corporate meetings segmentsôshare of total turnover increased in 2015, increasing by 0.8% over 2014.

Q6. How many tourists did you handle in 2015?

2015: 30 respondents replied to this question

ITOA members handled a total of 493,750 tourists in 2015. This represented a 5.3% increase on the 2014 figure of 468,734 and a 5.9% increase on the 2013 figure of 466,451.

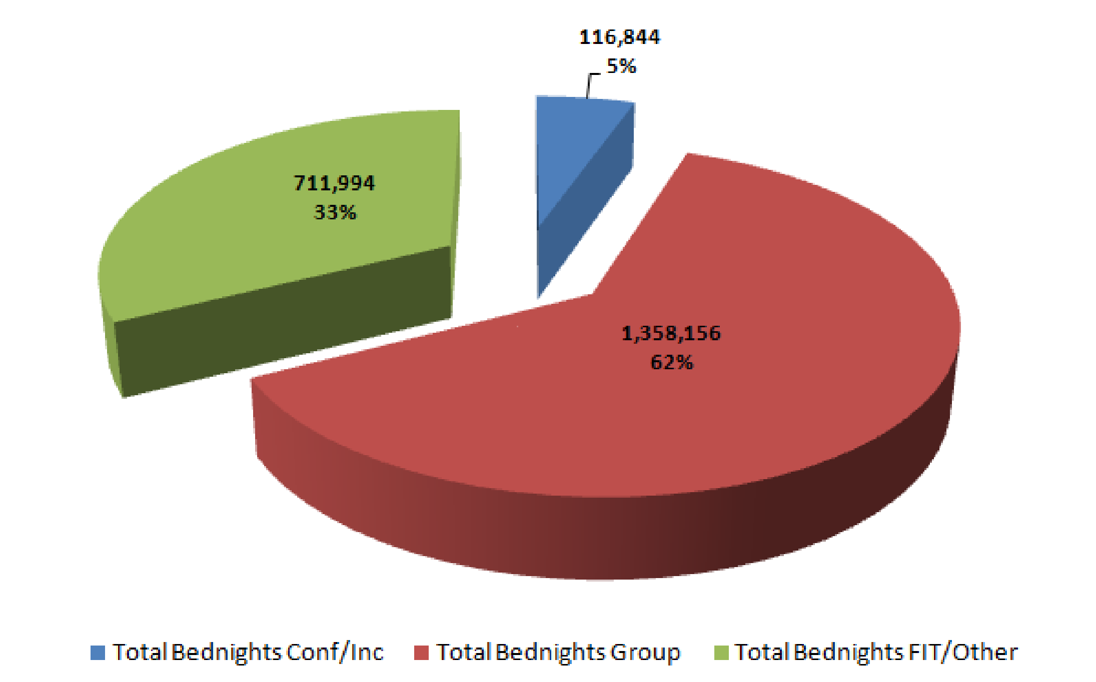
Q6a. Please estimate the average length of stay of your incoming visitors in 2015

2015: 30 respondents replied to this question

The weighted average length of stay for Groups in 2015 is estimated at 7.6 nights, with FIT/Other business averaging 5.0 nights and conference/incentive averaging 3.4 nights.

When compared with 2014, the average length of stay for Group business has increased by 0.4 nights, from the 2014 figure of 7.2 nights. The average length of stay for FIT/Other business remained the same at 5.0 nights and conference/incentive rose by 0.4 nights from 3.0 nights in 2014.

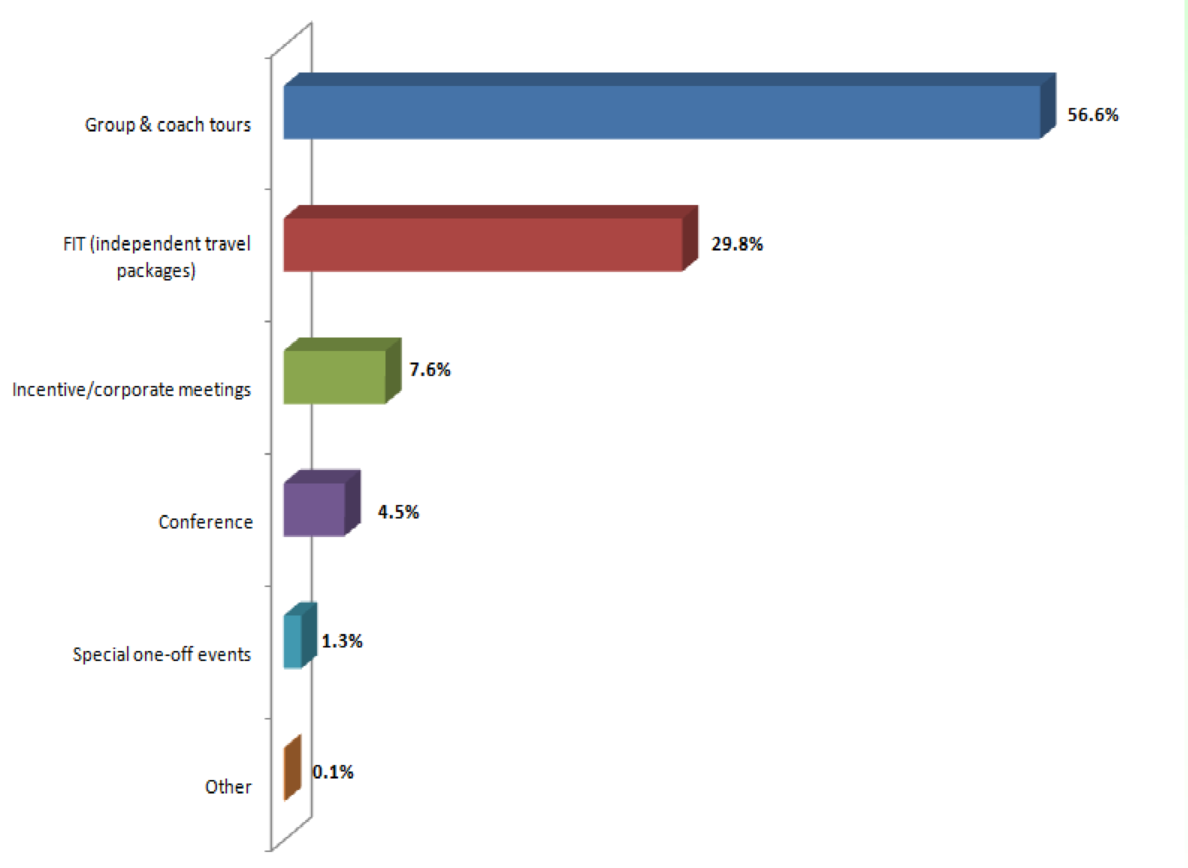
On this basis, the total number of bednights generated by the membership is estimated to have been 2.19 million in 2015, an increase of almost 131,600 bednights on 2014. Group bednights accounted for 62% of the total (over 1.35 million).



Q7. Please breakdown the total number of incoming visitors handled into the following categories

2015: 30 respondents replied to this question

Number of incoming visitors	2015
Group & coach tours	279,224
FIT *(independent travel packages)*	147,292
Incentive	37,631
Conference	22,458
Special one-off events	6,520
Other not stated	625
Total	**493,750**



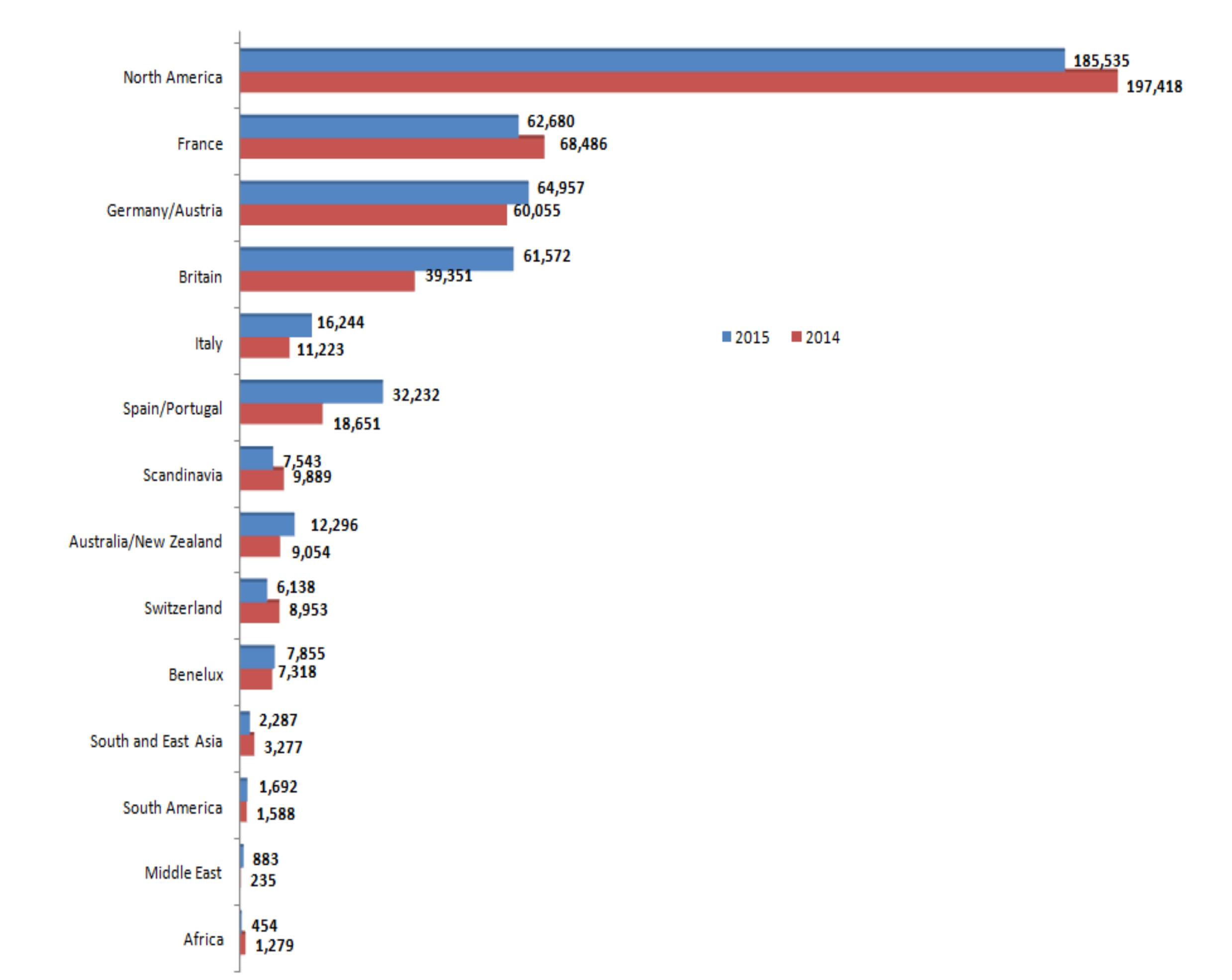
Q8. Please breakdown the total number of visitors handled by source market

2015: 30 respondents replied to this question

Overall in 2015, 87% of incoming business is for Leisure purposes with the remaining 12% being for Business. This is a marginal change from 2014, where leisure purposes accounted for almost 90% of Business accounted for 11%. The distribution by main market area is as follows:

	2015	Leisure	Business
Mainland Europe	44.7%	88.4%	11.6%
North America	37.8%	87.0%	13.0%
Britain	12.5%	80.6%	19.4%
Australia/New Zealand	2.5%	97.6%	2.4%
Other & Eastern Europe	1.5%	78.1%	21.9%
South and East Asia	0.5%	98.2%	1.8%
South America	0.3%	60.9%	39.1%
Africa	0.1%	70.9%	29.1%
Middle East	0.2%	86.7%	13.3%
Total	**100.0%**	**86.9%**	**13.1%**

Estimated Distribution of Tourists by Selected Source Market, 2015 vs. 2014



Market Growth Rates

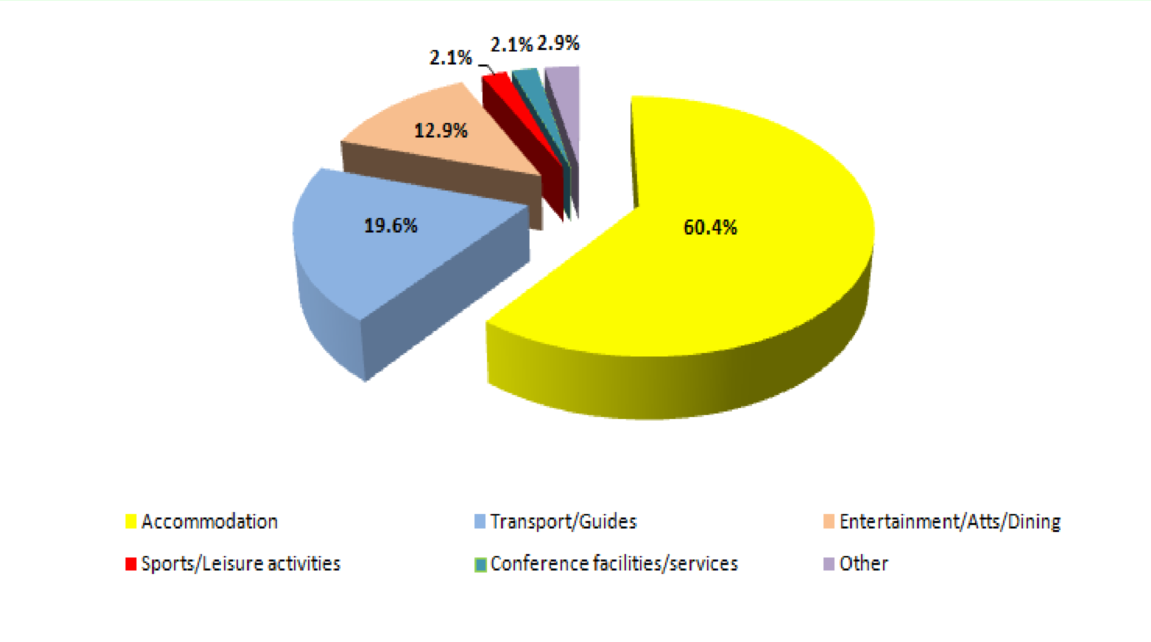
Market	2014/2015 % +/-
North America	-6.0%
France	-8.5%
Germany/Austria	+8.2%
Britain	+56.5%
Benelux	+7.3%
Italy	+44.7%
Spain/Portugal	+72.8%
South America	+6.5%
Australia/New Zealand	+35.8%
South & East Asia	-30.2%
Scandinavia	-23.7%
Switzerland	-31.4%
Africa	-64.5%
Middle East	+275.7%

Overall, the four largest markets of North America, France, Germany/Austria and Britain generated 76% of the total number of tourists in 2015, down slightly from a 78% share recorded in 2014.

Other source markets show varying degrees of fluctuation year on year. In long haul markets from which the base number of visitors is particularly small, variations from year to year appear greater and can be caused by once-off pieces of business.

Q9. What was the distribution of your purchasing on the Island of Ireland in 2015 by main product category?

2015: 29 respondents answered this question

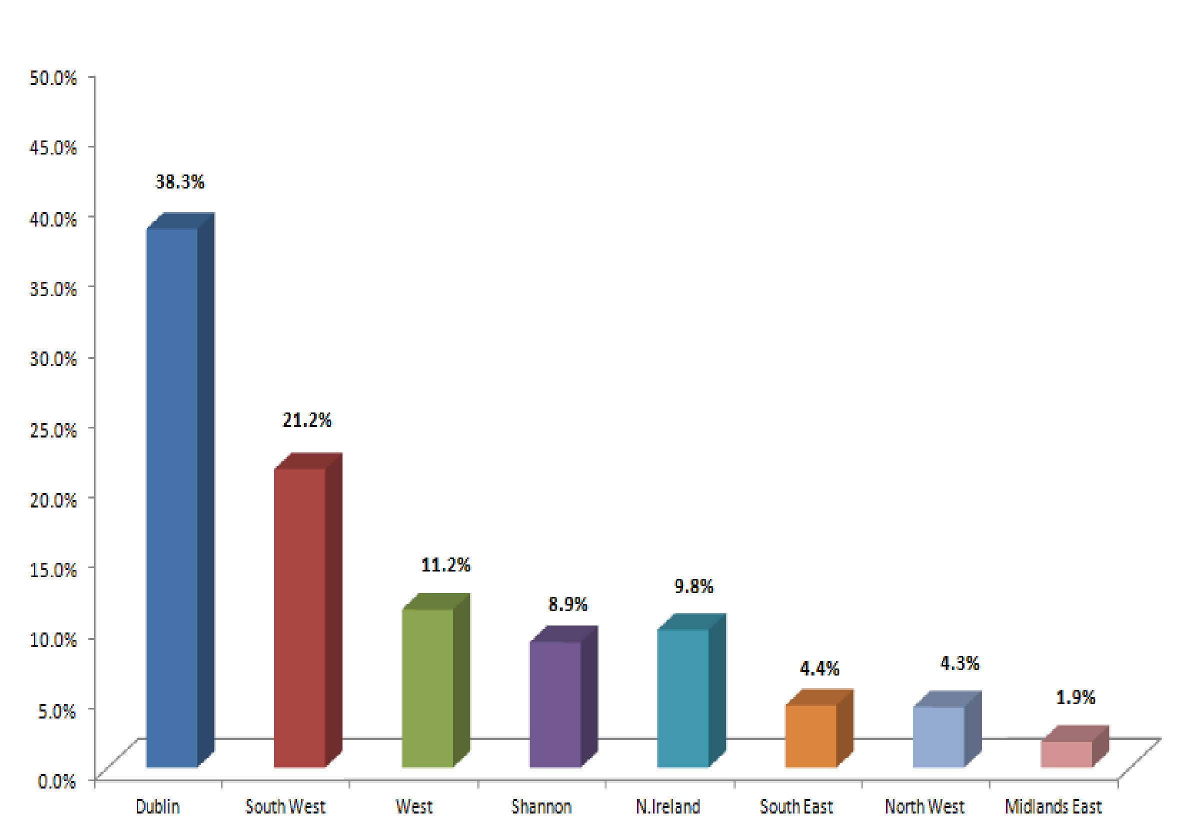


Source Market	2015
Accommodation	60.4%
Transport/Guides	19.6%
Entertainment/Attractions/Dining	12.9%
Conference facilities/services	2.1%
Other	2.9%
Sports/Leisure Activities	2.1%
Total	**100.0%**

Accommodation accounted for close to two-thirds of the procurement of services by ITOA members in 2015. Transport and entertainment are the other two major areas of expenditure. This was in line with 2014 in all cases, with only very minor variances compared with the previous year.

Q10. What was the regional distribution of your business in 2015 by value?

2015: 30 respondents replied to this question



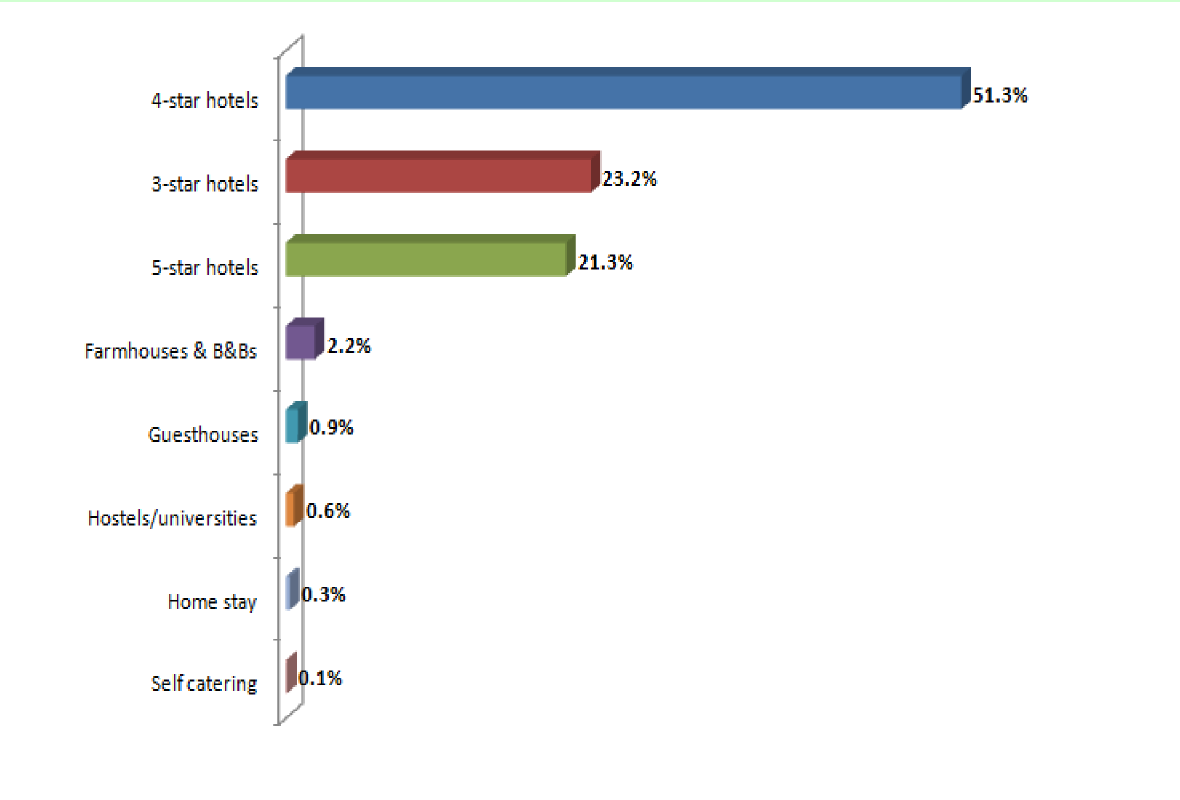
	Dublin	South West	West	Shannon	NI	South East	North West	Midlands-East
2015	38.3%	21.2%	11.2%	8.9%	9.8%	4.4%	4.3%	1.9%

Dublin accounted for 38% of total turnover in 2015, in line with its share in 2014. The balance (62%) of ITOA membersô business was distributed throughout the regions, highlighting the crucial role that Incoming Tour Operators perform in promoting the regional distribution of tourism in Ireland as a whole.

Q11. What was the distribution of your purchasing on the Island of Ireland in 2015 within the following product categories?

a) Purchasing of Accommodation

2015: 29 respondents replied to this question



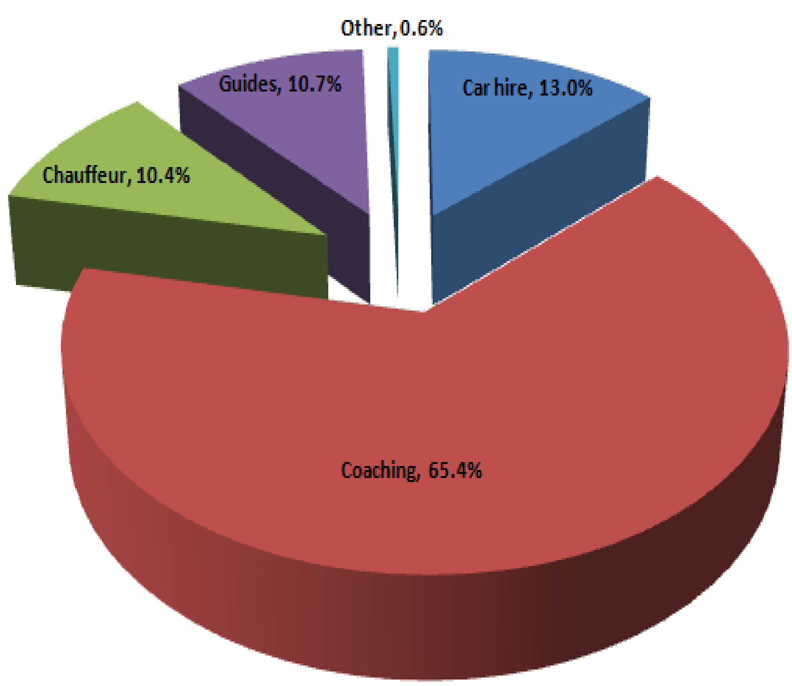
Accommodation	2015
4-star hotels	51.3%
3-star hotels	23.2%
5-star hotels	21.3%
Farmhouses & B&Bs	2.2%
Hostels/Unis	0.6%
Guesthouses	0.9%
Home stay	0.3%
Self catering	0.1%

4-star hotels continued to be the dominant accommodation option, with a marginal increase to 51.3% of purchasing in 2015 over the 2014 total of 49.1%. There was a slight decrease in the purchasing of 3-star hotel accommodation, but an increase in the purchasing of 5-star hotel accommodation which rose to a 21.3% share in 2015 from 18.1% in 2014, reflecting the growth in the incentive/corporate meetings segment.

Q11. What was the distribution of your purchasing on the Island of Ireland in 2015 within the following product categories?

b) Purchasing of Transport

2015: 29 respondents replied to this question



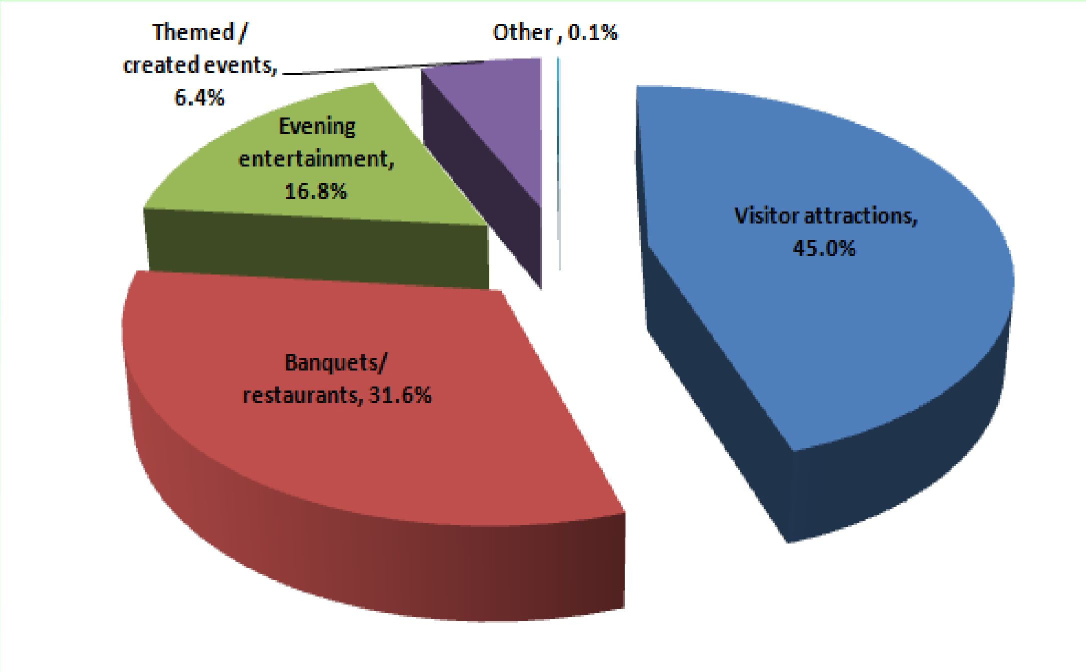
	Coaching	Car Hire	Chauffeur	Guides	Other
2015	65.4%	13.0%	10.4%	10.7%	0.6%

This pattern reflects the continuing and growing large share of overall business attributable to Group & Coach Tours. The notable variation over 2014 is the increase in coaching by 2.9% and car hire and chauffeur reducing marginally by 1.4% in both instances.

Q11. What was the distribution of your purchasing on the Island of Ireland in 2015 within the following product categories?

c) Purchasing of Entertainment / Attractions

2015: 27 respondents replied to this question



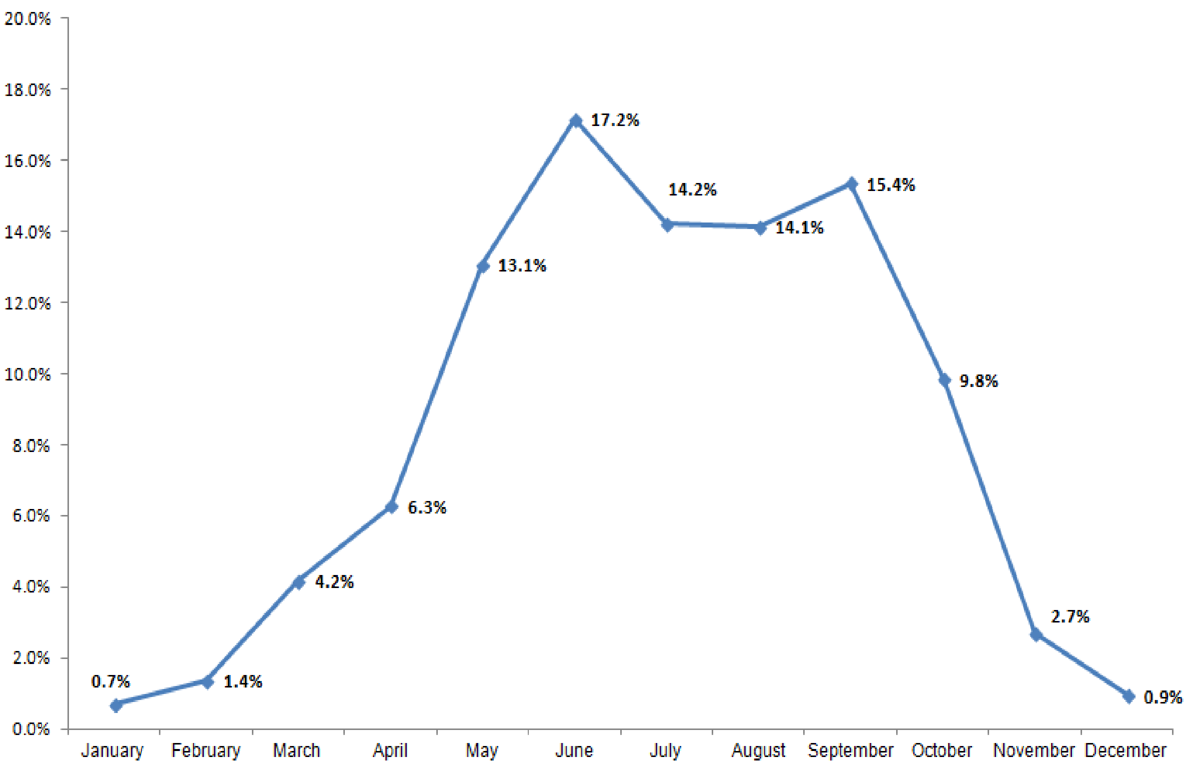
	Visitor attractions	Banquets/ restaurants	Evening entertainment	Themed / created events	Other
2015	45.0%	31.6%	16.8%	6.4%	0.91%

Over the years, visitor attractions have accounted for an increasingly large share of this component of procurement - in 2005, this sector accounted for 26% of the total, whereas in 2015 they represented 45%.

Banquets/restaurants and evening entertainment rose marginally by 1.3% and 0.5% respectively in 2015, however the share of themed/created events decreased in 2015 to 6.4%, down 4.1% on 2014.

Q12. What was the seasonal distribution of your business in 2015 by value?

2015: 30 respondents replied to this question



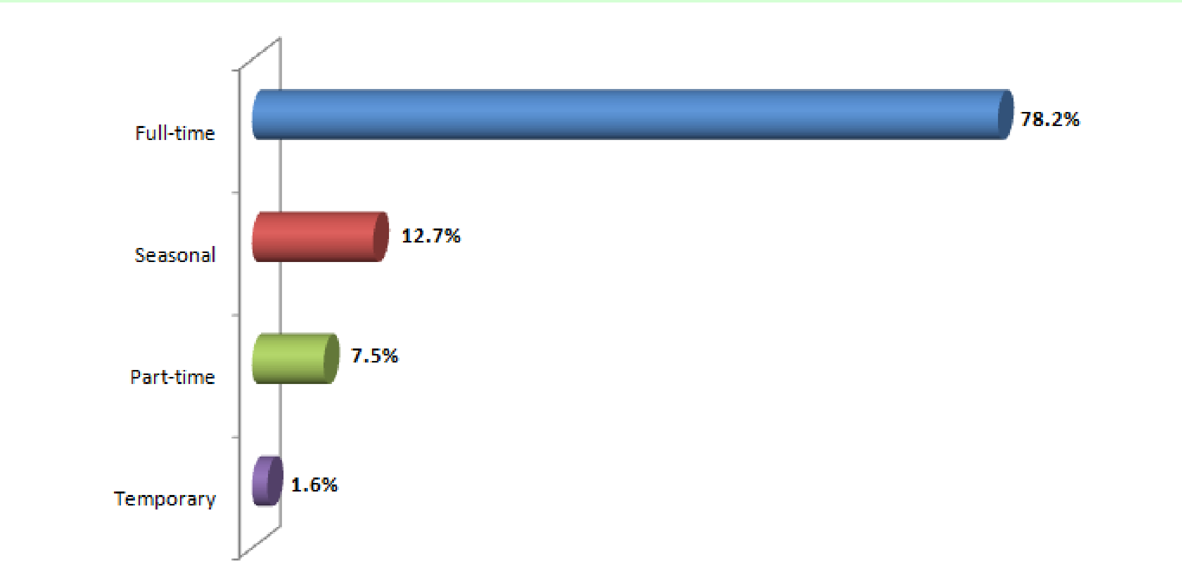
	2015
January	0.7%
February	1.4%
March	4.2%
April	6.3%
May	13.1%
June	17.2%
July	14.2%
August	14.1%
September	15.4%
October	9.8%
November	2.7%
December	0.9%

Q13. How many staff did you employ in 2015?

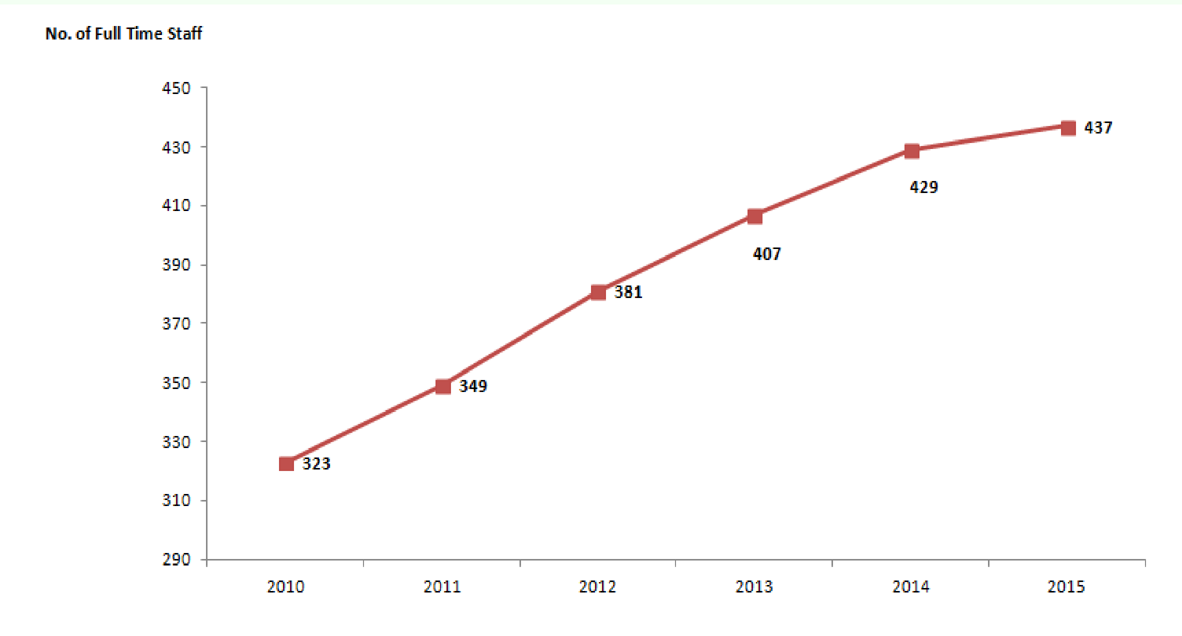
2015: 30 respondents replied to this question

A total of **559 staff** were employed in 2015. The distribution of staff by employment category is as follows:

	2015
Full-time	78.2%
Seasonal	12.7%
Part-time	7.5%
Temporary	1.6%



As shown in the chart below, there was a 1.9% increase in the number of full time staff employed between 2014 and 2015, building on the 5.4% increase between 2013 and 2014.



Q14. What, if any, skill and/or educational deficits did you experience when recruiting staff in 2015?

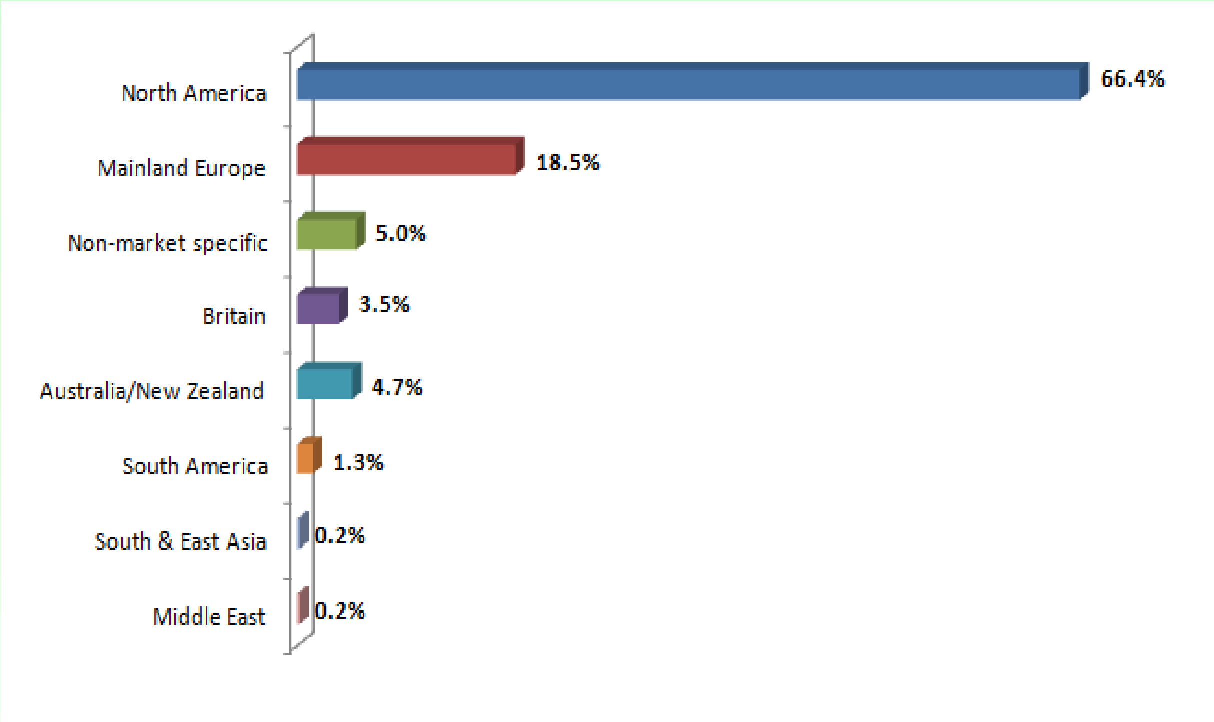
Between 3 to 8 respondents answered Yes to any of these questions.

Notable deficits in the recruitment of staff in 2015 included poor knowledge of the Irish tourism product, followed by a poor understanding of the tour operating sector and the geography of the island. This was in line with 2014 trends.

Poor writing skills and poor verbal communication skills were also mentioned by respondents, followed by some weaknesses with the French and German languages, albeit from a very small number.

Q15. What was the distribution of your marketing expenditure in 2015?

2015: 28 respondents replied to this question



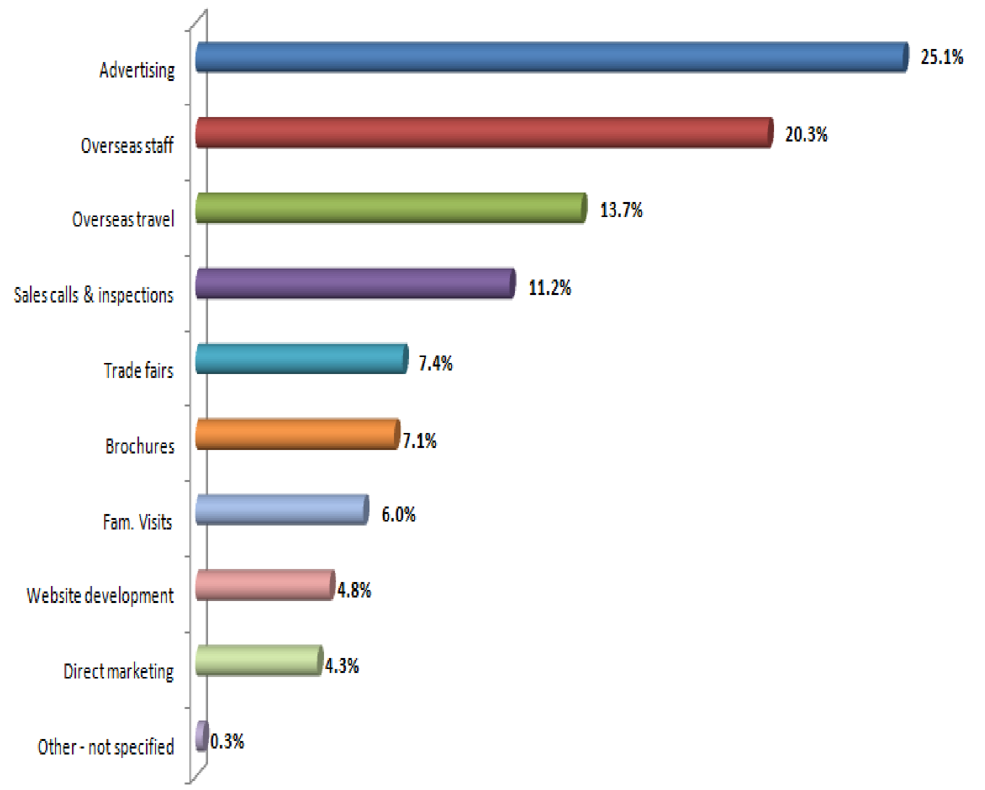
	2015
North America	66.4%
Mainland Europe	18.5%
Non-Market Specific	5.0%
Britain	3.5%
Australia / New Zealand	4.7%
South America	1.3%
South & East Asia	0.2%
Middle East	0.2%

The total marketing spend of all ITOA members in 2015 is estimated at **€7.97 million**, a decrease of 1.4% on the 2014 figure of ú8.08 million.

Q16. What was the distribution of your sales & marketing expenditure in 2015 by activity type?

2015: 29 respondents replied to this question

	2015
Advertising	25.1%
Overseas staff	20.3%
Overseas travel	13.7%
Sales calls & inspections	11.2%
Trade fairs	7.4%
Brochures	7.1%
Fam. visits	6.0%
Website development	4.8%
Direct marketing	4.3%
Other not specified	0.3%



Advertising accounted for a quarter of sales and marketing expenditure in 2015, in line with 2014. Expenditure on brochure production and familiarisation visits increased by 1.2% and 0.9% respectively in 2015, with direct marketing decreasing by 2.3% over 2014.

Q17. How much time in man-days did staff based in Ireland spend travelling overseas in 2015?

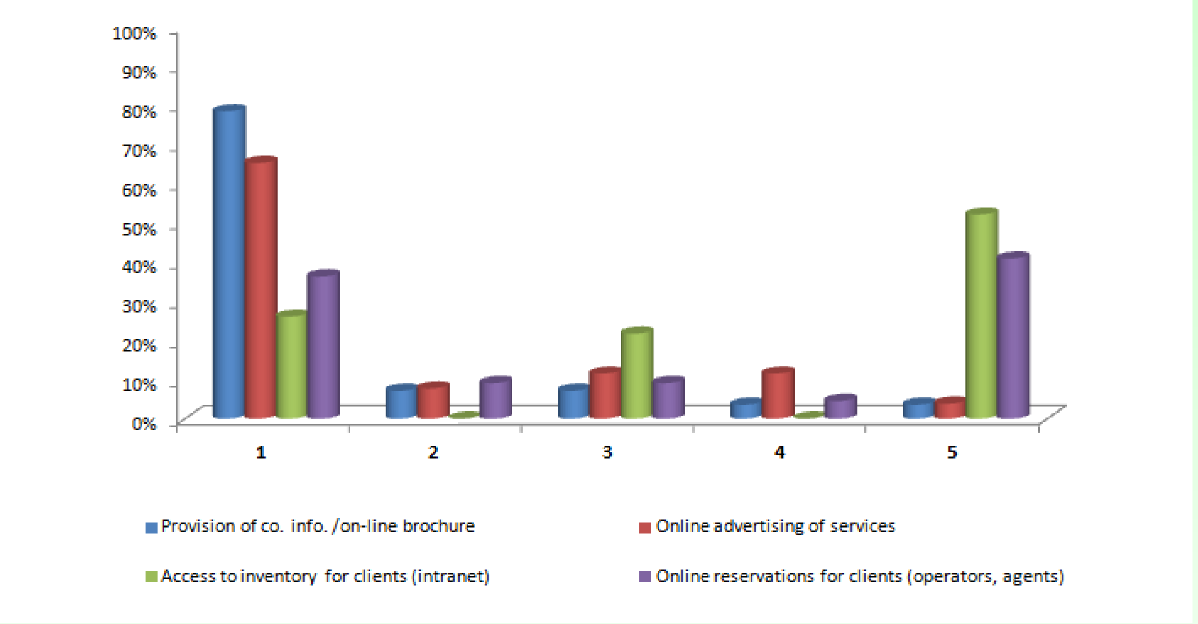
2015: 29 respondents replied to this question

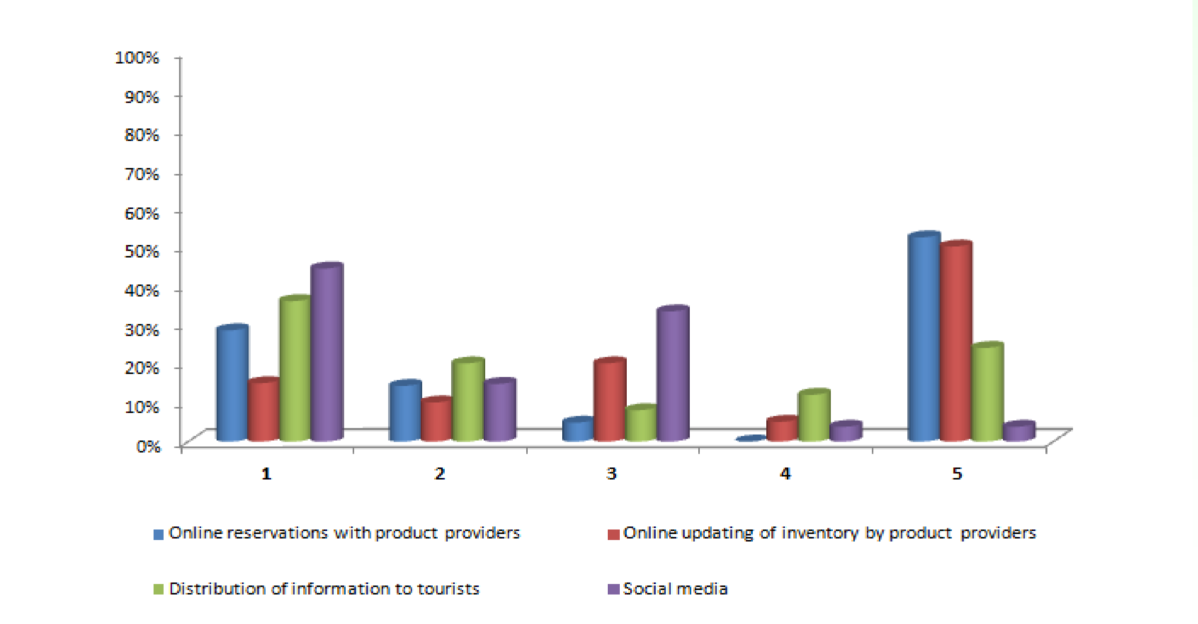
Marketing staff employed by respondents spent a combined total of **2,302 man-days** travelling overseas in 2015. This was an increase of 114 man-days on the total of 2,188 man-days reported in 2014 and 321 man-days on the total of 1,981 reported in 2013. This represents a very significant intensification of in-market sales and marketing work.

Q18. Which of the following uses of the Internet does your business with customers include in 2015?

Please indicate the importance of each use,
where 1 = very important and 5 = unimportant

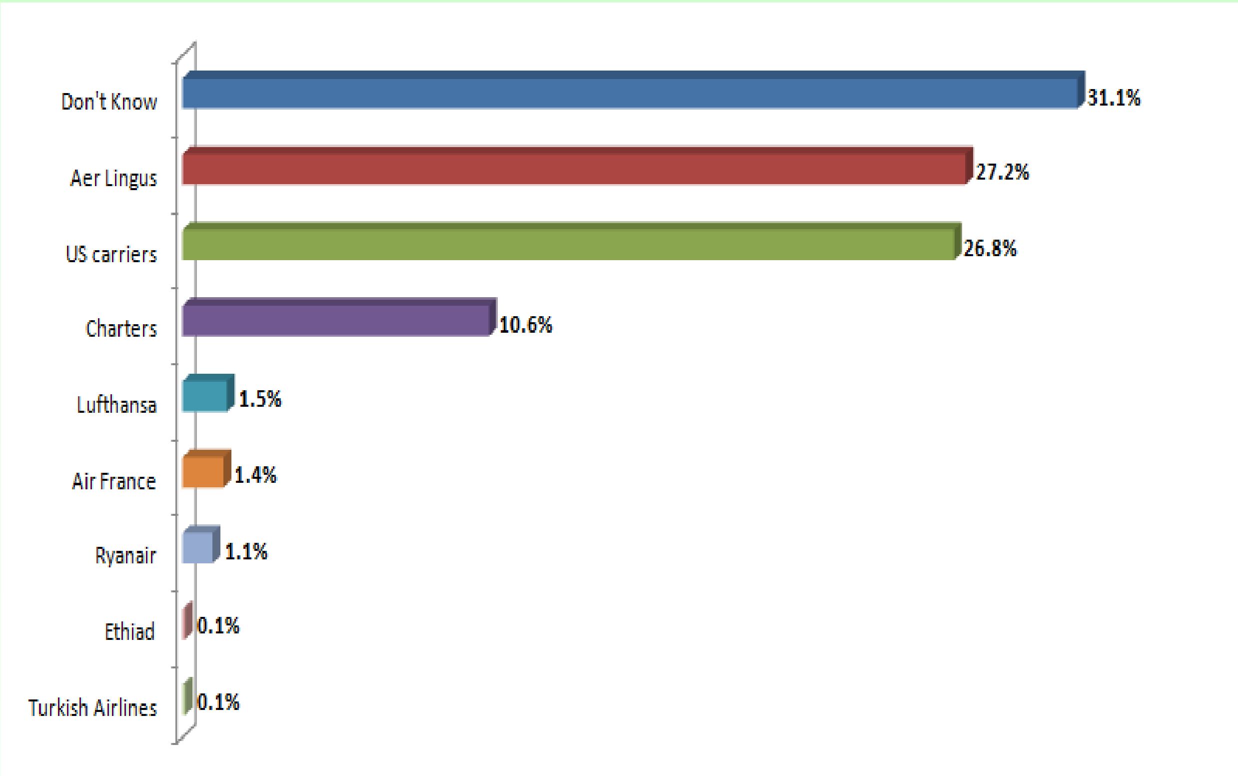
2015: between 21 and 28 respondents replied to each of the questions.





Q19: Of your overall group business in 2015, could you identify (approx.) what percentage used the following airlines?

2015: 24 respondents replied to this question



	2015
Don't Know	31.1%
Aer Lingus	27.2%
U.S. carriers	26.8%
Charters	10.6%
Lufthansa	1.5%
Air France	1.4%
Ryanair	1.1%
Turkish Airlines	0.1%
Etihad	0.1%

The responses to this question outlined in the above chart primarily reflects that U.S. group inbound sector as the information is easier to track from this market given that airport transfer for arriving and departing passengers is provided for this market. The high levels of don't know would reflect the continental European markets where clients book only land package arrangements and can use a greater variety of access providers often booked directly and separately by the client.

Q20: Please identify the major issues that influenced your business performance in 2015: *(in order of priority):*

2015: 27 respondents replied to this question

Positive Issues

Strong currency exchange rates - $ and £; favourable FX rates means clients can spend more.
Improvements and growth with world economy, strong Irish economy; client willingness to spend – perception that the recession is over.
Ireland perceived as a **safe country/destination**, terrorism threats in other countries make Ireland more attractive destination resulting in greater consumer confidence.
Increased access from North America and Europe; good air fares; value of the dollar makes it more attractive for our groups from the USA.
Positive **business environment and culture**, all the team buy into our values and vision for the company - everyone focused on the customer's experience and satisfaction.
Excellent referral and repeat business - highly valued within our partner and supplier network; Repeat business; Attendance at conferences to meet with prospective agents, **building stronger relationships -** Upturn in the markets resulting in more enquiries for groups and individuals to Ireland, good bookings and interest.

Negative Issues

Problems with hotel availability, capacity and prices in the main tourism centres – not exclusively a Dublin problem - turning away business because of bottlenecks in prime locations; especially a problem for 3-star accommodation. Difficulty in finding space results in clients choosing other destination.
Upward pressure on hotel room rates; hotels not honouring contracted rates, not giving allocations or rooms available on request basis. P**rice increases causing Ireland to be less competitive and perception we are becoming too expensive.**
Lack of qualified guides.
Difficulty in finding accommodation suitable for **large groups**.
Serious lack of gala dinner space.

Q21: Please identify the top opportunities to your business performance in the coming 3 years *(in order of priority):*

2015: 26 respondents replied to this question

Opportunities

Competitive currencies and exchange rates are still working in our favour;
Better access into Ireland ï more routes, improved flights and ferry costs.
Leveraging our growing prestige and reputation and brand both with customers and stakeholders; increased popularity of Ireland with recent high profile screen appearances; in demand and has been enjoying positive media attention; high Trip Advisor ratings.
Diversity of new and existing tourism product; new markets and new programmes to offer; e.g the development of walking and cycle paths and routes and increase in activity in the demand for adventure and cultural experience.
Promoting our product more and better - meeting with existing agents to get to increase business to Ireland; attending conferences; continuously improving customer service; new marketing initiatives; increase in repeat business
Consumer confidence and satisfaction; greater client willingness to spend, ôsafeö destination.
Success of marketing initiatives - Irelandõs Ancient East and the Wild Atlantic Way ï Failte Ireland need to inform and update inbound sector too!.
Refurbishment, upgrading and investment in existing hotels; positive opportunities with prestigious castle properties like Ashford and

Threats

Fear of terrorist attacks; people afraid to travel; world unrest; global instability; terrorism threat in Europe impacting travel especially from USA; spread of viruses.
Not enough hotel space in key tourism centres of Dublin, Galway, Killarney and Belfast; already losing significant business because no space or too expensive; making us uncompetitive; could start to be interpreted as Ireland not being open for business anymore.
Currency fluctuation rates not going in our favour; slowdown in growth of Eurozone and US economies; negative impact to Irelandsõ brand image.
Potential removal of 9% rate and airport duty 0 rating
Suppliers not offering competitive rates; exorbitant rates in hotels especially in Dublin; Dublin as a destination is becoming too expensive.
Lack of language guides ï FI not running guide training programmes.

Appendix

LIST OF MEMBERS IN 2015

No.	**Organisation**
1.	A Touch of Ireland
2.	Abbey Tours
3.	Adams & Butler
4.	Advantage ico
5.	Alainn Tours
6.	Aspects of Ireland
7.	Brendan Vacations Ireland
8.	Celtic Horizon Tours
9.	CIE Tours International
10.	Custom Ireland
11.	Irish Education Partners
12.	Eirebus DMC
13.	Excursions Ireland
14.	Green Life Tours
15.	Green Light Events
16.	Hello Ireland Tours (HIT)
17.	INTO Ireland Travel
18.	Irish Rugby Tours
19.	Irish Welcome Tours
20.	Joe OôReilly Ireland Group
21.	Limerick Travel
22.	Moloney & Kelly Travel
23.	Odyssey International
24.	Ovation Ireland
25.	Premier Travel
26.	Shamrocker Adventures
27.	Specialised Travel Services
28.	Travel Choice Ltd.
29.	Vagabond Adventure Tours
30.	Wallace Travel Group

A4. SURVEY QUESTIONNAIRE

CHL
CHL CONSULTING Co. LTD.

ITOA
INCOMING TOUR OPERATORS ASSOCIATION - IRELAND

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Survey of Membership Business, 2015

Please return the completed survey form by e-mail to smcmahon@chl.ie

This confidential survey is being conducted by CHL Consulting Co. Ltd. on behalf of the Irish Tour Operators Association (ITOA). The purpose of the survey is to gather core information on the business operations of ITOA members in 2015, and on key issues that are affecting performance. The findings of the survey will enable the ITOA to represent and promote the interests of its members more effectively and to influence external bodies including Tourism Ireland, Fáilte Ireland, ITIC and the IHF. **Your input is vital.** The survey is strictly confidential. CHL will not release completed questionnaires to any other person or organisation under any circumstances. The findings will be aggregated in our analysis and our report will not identify any individual or company.

Please complete this Excel survey and Save As an Excel file with the name of your Organisation, and return directly to CHL Consulting by email by Friday, 5th February, 2016. Please call Michael Counahan or Siobhán McMahon at CHL (tel: 01 284 4760 / smcmahon@chl.ie) if you have any queries.

NOTE: ALL DATA PROVIDED SHOULD REFER TO THE YEAR 2015

1) Company Name:

2) Questionnaire completed by:

3a) What was your gross turnover in 2015, including VAT? €

3b) What was the value of your total purchasing from Irish suppliers in 2015? *Note: include all suppliers in both N.I. and Republic* €

4) What % of your turnover came from the following business channel?

Channel	% share of turnover	Channel	% share of turnover
Tour Operators		**Incentive/Corporate Meetings**	
Travel Agents		**Conference**	
Internet *(B2B online bookings)*		**Cruise**	
Customer Direct *(online bookings)*		**Other** *(please specify)*	
Customer Direct *(non-internet bookings)*		Total	0.0%

5) What % of your turnover came from the following product categories in 2015?

Category	% share of turnover	Category	% share of turnover
Group & Coach tours *(incl. student, language, & special interest)*		**Conference** *(incl. event management)*	
FIT		**Special One-Off Events**	
Incentive/Corporate Meetings		**Other** *(please specify)*	
Cruise Excursions		Total	0.0%

6) How many incoming visitors did you handle in 2015?

Direct (all packages including accommodation)	
Indirect (programmes/packages not including accommodation)	
Total	0

a) Please estimate the average length of stay of your incoming visitors in 2015

Conference/Incentive		days
Group		days
FIT/Other		days

(Your estimate of the average length of stay per visitor will enable us to estimate the total number of bednights generated which, in turn, will facilitate the calculation of economic contribution. In the case of groups, this could be done, for example, by adding the duration of stay by all groups, and dividing by the number of groups; in the case of FITs, this may be down to your best estimate based on the typical length of an FIT programme.)

7) Please breakdown the total number of incoming visitors handled into the following categories

Category	No.	Category	No.
Group & Coach tours *(incl. student, language, & special interest)*		**Conference** *(incl. event management)*	
FIT		**Special One-Off Events**	
Incentive/Corporate Meetings		**Other** *(please specify)*	
Cruise Excursions		Total	0

8) Please breakdown the total number of incoming visitors handled by source market?

Source Market	Leisure No.	Business Tourists	Source Market	Leisure No.	Business Tourists
Britain			**Other Europe**		
Mainland Europe			*- Andorra*		
- Germany/Austria			*- Armenia*		
- France			*- Azerbaijan*		
- Benelux			*- Georgia*		
- Italy			*- Cyprus*		
- Switzerland			*- Iceland*		
- Spain/Portugal			*- San Marino*		
- Scandinavia			*- Liechenstein*		
- Greece			*- Turkey*		
Eastern Europe			*- Malta*		
- Albania			*- Monaco*		
- Belarus			*- Montenegro*		
- Bosnia & Herzegovnia			*- Vatican City*		
- Bulgaria			**North America**		
- Croatia			*- USA*		
- Czech Republic			*- Canada*		
- Estonia			*- Mexico*		
- Hungary			South America		
- Kosovo			Middle East		
- Latvia			South and East Asia		
- Lithuania			Australia/New Zealand		
- Macedonia			South Africa		
- Moldova			Other Africa		
- Romania			Ireland		
- Poland			**Total**	0	0
- Russia					
- Serbia					
- Slovakia					

9) What was the distribution of your purchasing in Ireland, North and South, in 2015 by main product category?

Product Category	% Total Purchasing	Product Category	% Total Purchasing
Accommodation		Sports/Leisure Activities *(golf, equestrian etc.)*	
Transport/Guides		Conference facilities/services	
Entertainment/Attractions/ Dining		Other (please specify)	
		Total	0.0%

10) What was the regional breakdown of your business in 2015 by value?

Region	% share of turnover	Region	% share of turnover
Dublin		Shannon	
Midlands-East		West	
South-East		North-West	
South-West		N.Ireland	
		Total	0.0%

11) What was the distribution of your purchasing in Ireland, North and South, in 2015 within the following product categories?

A) Accommodation	%	B) Transport	%	C) Entertainment/Attractions	%
3-star hotels		Car hire		Visitor attractions	
4-star hotels		Coaching		Banquets/restaurants	
5-star hotels		Chauffeur		Evening entertainment	
Guesthouses		Guides		Themed/created events	
Farmhouses & B&Bs		Other		Other	
Self-catering		Total	0.0%	Total	0.0%
Hostels/Universities					
Home stay					
Other					
Total	0.0%				

12) What was the seasonal distribution of your business in 2015 by value?

Month	% share of turnover	Month	% share of turnover
January		July	
February		August	
March		September	
April		October	
May		November	
June		December	
		Total	0.0%

13) How many staff did you employ in 2015?

Category	No.	Category	No.
Full-time		Seasonal	
Part-time		Temporary	
		Total	0

14) What, if any, skill and/or educational deficits did you experience when recruiting staff in 2015?
(pls insert 'X' in the appropriate boxes)

	Yes	No
a) Poor writing skills		
b) Poor verbal communication skills		
c) Poor basic maths		
d) Foreign language skills		
- French		
- German		
- Spanish		
- Italian		
- Other		
e) Knowledge of tour operating		
f) Knowledge of the Irish tourism product		
g) Knowledge of Ireland		
h) Other		

15) What was the distribution of your sales & marketing expenditure in 2015?

Market	%	Market	%
Britain		Middle East	
Mainland Europe		South & East Asia	
North America		Australia/New Zealand	
South America		Non-market specific	
		Total	0.0%

(non-market specific includes, for example, HQ & marketing staff, global marketing, general internet based marketing etc.)

15a) What was your Total Sales & Marketing Spend €

Note: Please include the salaries of staff based in Ireland in the total [but overseas travel costs and representation should be included].

16) What was the distribution of your sales & marketing expenditure in 2015 by activity type?

Activity type	%	Activity type	%
Overseas staff *(incl. o'seas representation)*		Website development	
Brochures		Overseas travel	
Trade fairs		Sales calls & inspections	
Advertising		Fam. visits	
Direct marketing		Other *(please specify)*	
		Total	0.0%

17) How much time in man days did staff based in Ireland spend travelling overseas in 2015? days

18) Which of the following uses of the internet does your business with customers involve?
Please indicate the importance of each use, where 1 = very important and 5 = unimportant

a) Provision of company information/on-line brochure	
b) On-line advertising of your services	
c) Access to inventory for clients (intranet)	
d) On-line reservations for clients (operators, agents)	
e) On-line reservations with product providers	
f) On-line updating of inventory by product providers	
g) Distribution of information to tourists	
h) Social media	
i) Other activities *(please specify)*	

19) Of your overall group business in 2015, could you identify (approx.) what % used the following airlines?

Airline	%	Airline	%
Aer Lingus		Charters	
Lufthansa		U.S. carriers	
Air France		Other *(please specify)*	
Ryanair		Don't Know	
		Total	0.0%

20) Please identify the major issues that influenced your business performance in 2015

Positive	**Negative**

21) Please identify, in order of importance, the top 5 opportunities and threats to your business in the coming 3 years

Opportunities	**Threats**

22) What are your expectations for 2016?

a) Increase/decrease in PAX - insert % (+/-) below	Estimated 2016 PAX based on % change
	-
b) Increase/decrease in Turnover - insert % (+/-) below	Estimated 2016 Turnover based on %
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THANK YOU FOR YOUR TIME AND COOPERATION

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