



# West Cork Regional Branding

***Tourism Survey 2000-2004***

## **Report on main findings**

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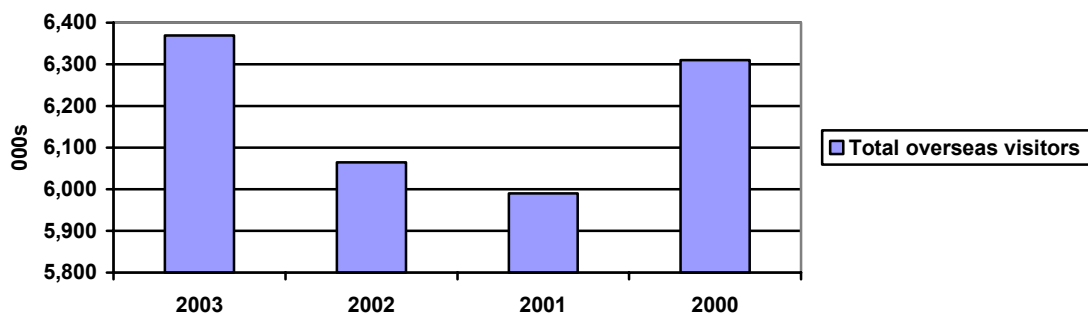
*Prepared for Jean Sullivan  
West Cork LEADER Co-Op.  
March 2005*

## International tourism to Ireland

The latest census of the size of the Cork County population in 2002, shows that there were 447,829 people in Cork, of which 123,062 were in Cork City and 324,767 in the County. This compares to 132,527 in Co Kerry and 175,304 in Co Limerick. Cork represents 11.4% of the Irish population.

There were just over 6 million overseas tourist visits to Ireland (this might include multiple visits by one tourist) in 2003, which was up by 0.9% from the 2000 level, despite a dip in 2001 following 9/11. As the following table shows, the numbers of visitors from Britain (58% of overseas tourists in 2003) have risen by 5% over the four years from 2000 to 2003, the latest full year for which CSO data is available.

### Total visitor numbers 2000-2003



(source: CSO online direct database)

For the third quarter of 2004 (the latest statistics available), the total visitor level was down very slightly (0.6%) on the same period in 2003, though the number of visitors from Britain fell by 3.6% in this period and numbers from North America grew by 2.8%. Despite this recent downturn, in the first three quarters of 2004, total numbers were up by 2.8%.

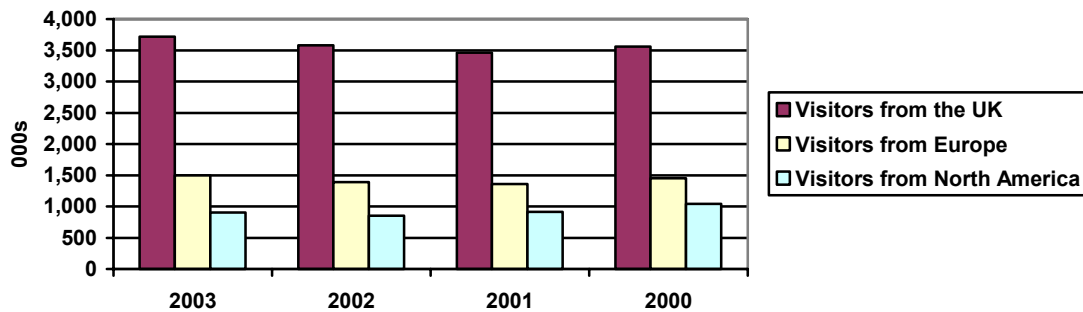
Tourists from the rest of Europe (24% in 2003) have increased by 3%, and tourists from North America, representing 14% of all overseas tourists to Ireland in 2003, dropped by 13% in the four years, from 16.5% of all overseas tourists in 2000. Nevertheless, this is an improvement on 2002 levels, and an upward trend which continues in 2004.

	change	2003	2002	2001	2000
	2000-03	000s	000s	000s	000s
Total overseas visitors	+0.9%	6,369	6,065	5,990	6,310
Visitors from Britain	+4.5%	3,719	3,579	3,462	3,559
Visitors from Europe	+3.0%	1,497	1,392	1,357	1,453
Visitors from North America	-13.3%	904	849	912	1,043

(source: CSO online direct database)

## Visitor numbers by region of origin 2000-2003

(source: CSO online direct database)



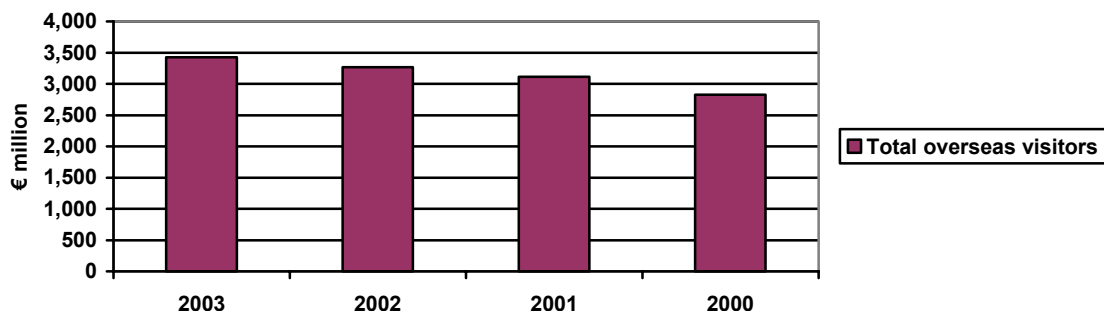
The number of business visits dropped from 1.074 million in 2000 to 854,000 in 2003.

## Tourist expenditure in Ireland

CSO statistics do not identify in which county tourists spend their money, but they do identify the origins of the tourists and how much they spend. Out of a total of €3.4 billion expenditure (excluding international fares), visitors entering Ireland from Britain spend more than half (54%) of total overseas visitor expenditure, but their expenditure grew by only 13% between 2000 and 2003. American tourists spend 16% of the total, but their expenditure rose by 44% over the same period, and European tourists spend 23% of the total, but their expenditure rose 32% over this period.

## Total visitor expenditure 2000-2003:

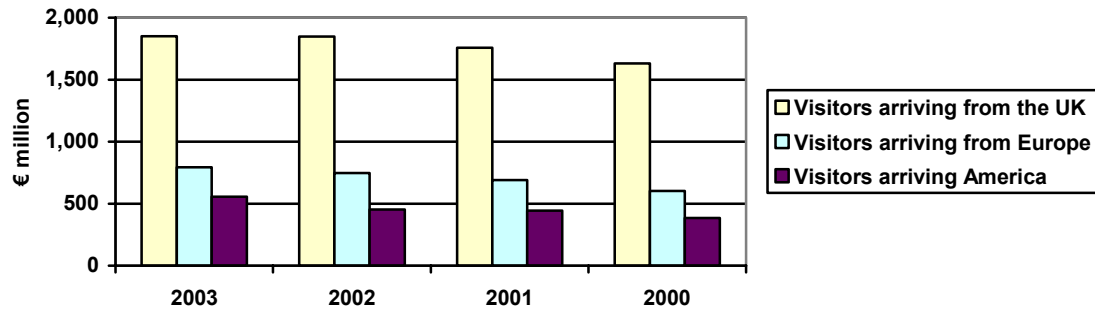
(source: CSO online direct database)



	Rise	2003	2002	2001	2000
	2000-03	€ Million	€ million	€ million	€ million
Total overseas visitors	21%	3,426	3,266	3,115	2,824
Visitors arriving from Britain	13%	1,849	1,848	1,757	1,630
Visitors arriving from Europe	32%	794	747	690	603
Visitors arriving America	44%	555	451	445	385

## Visitor expenditure by region of origin:

(source: CSO online direct database)



By cross-analysing the tourist numbers and estimated expenditure tables above we can arrive at per capita expenditure by overseas tourists in Ireland. The average overseas visitor spent €538 in 2003, up 20% from the level in 2000. The average American tourist spent €614, but this was 66% more than in 2000, despite the downturn in numbers.

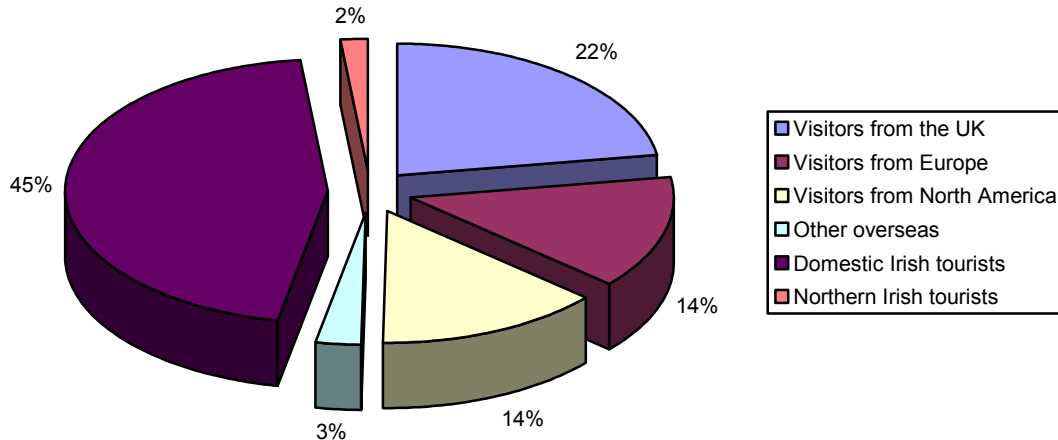
	rise	2003	2002	2001	2000
	2000-03	€	€	€	€
Total overseas visitors	20.1%	538	538	520	448
Visitors arriving from Britain	12.7%	497	516	508	458
Visitors arriving from Europe	29.4%	530	537	508	415
Visitors arriving from the Americas	43.9%	614	531	488	369

## Tourism to Cork and Kerry

Between 2000 and 2003, tourism to the South West dropped from 2,917,000 visits to 2,849,000 (-2.0%), which can all be attributed to international tourist numbers dropping, particularly those from North America in the wake of 9/11. Despite a small upturn in national figures for British and European tourists, the South West has suffered a continuing decline in number from these countries. Healthy growth in domestic tourist numbers and Northern Irish visitors has resulted in stability overall.

## Total numbers of visitors to Cork and Kerry in 2003

(source: Failte Ireland Regions South West Tourism Report 2004)



Visits to Cork & Kerry	change	2003	2002	2001	2000
	2000-03	000s	000s	000s	000s
Total overseas visitors	-13.5%	1,515	1,504	1,434	1,752
Visitors from Britain	-9.4%	638	675	594	704
Visitors from Europe	-13.4%	399	408	364	461
Visitors from North America	-18.5%	392	355	392	481
Other overseas	-18.7%	86	66	84	106
Domestic Irish tourists	+13.5%	1,287	1,315	1,234	1,134
Northern Irish tourists	+51.6%	47	46	35	31
TOTAL Tourist Visits	-2.0%	2,849	2,865	2,703	2,907

(source: Failte Ireland Regions South West Tourism Report 2004)

According to Failte Ireland, there were 1,029,000 tourist visits to County Cork in 2003 and 803,000 to County Kerry. The revenue generated from these visits was €389 million in Cork and €230 million in Kerry, or €378 per person in Cork and €286 per person in Kerry.

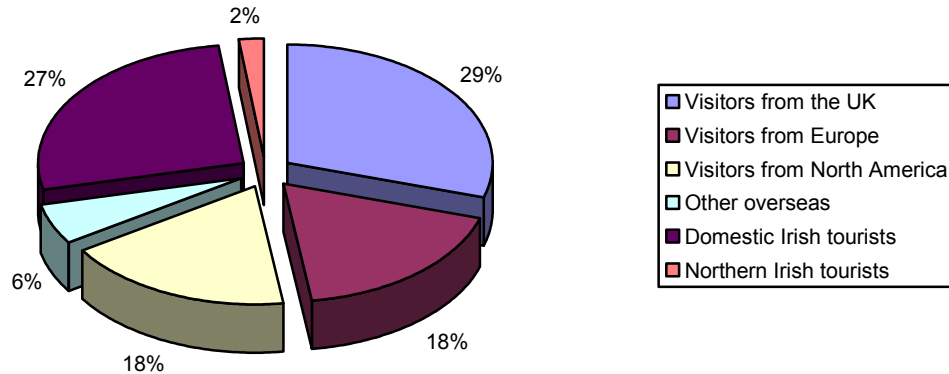
Nearly 40% of the people in Ireland are holidaying at home with 26% of all domestic holidays taken in Cork and Kerry (*Source: Failte Ireland*).

## Expenditure in Cork and Kerry

Despite the declining numbers of tourists to the South West, expenditure levels have risen by an average of 25% over the last four years, which would not represent an advance on inflation, however. The growth in expenditure is heavily reliant on domestic and Northern Irish tourists, whose numbers have risen fastest.

## Expenditure by visitors to Cork and Kerry in 2003 (€ million)

(source: Failte Ireland Regions South West Tourism Report 2004)

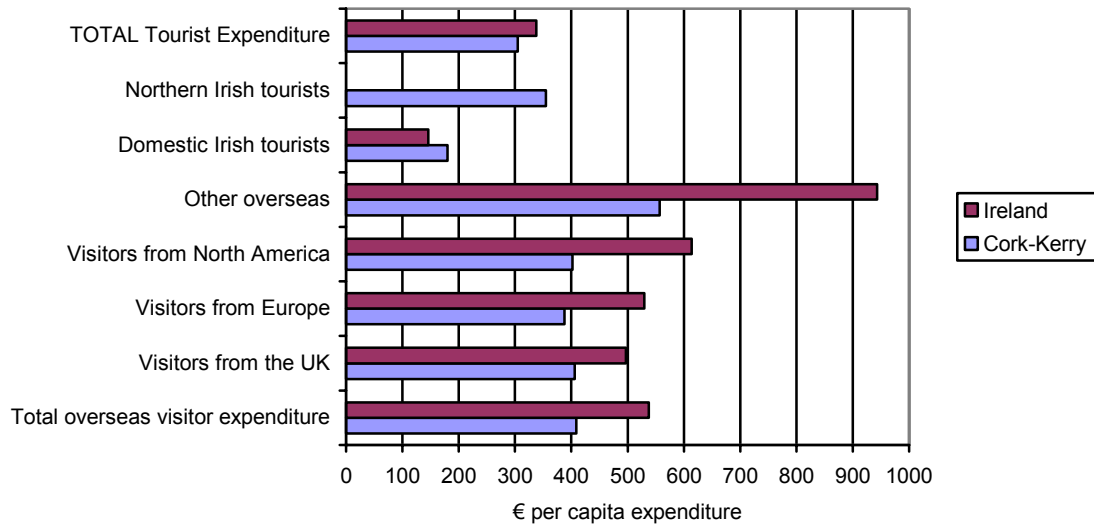


	Rise	2003	2002	2001	2000
	2000-03	€ Million	€ million	€ million	€ million
Total overseas visitor expenditure	22.1%	619.3	536.8	484.1	507.0
Visitors from Britain	24.2%	259.1	219.5	205.5	208.6
Visitors from Europe	25.1%	154.8	153.2	115.0	123.7
Visitors from North America	6.6%	157.5	141.3	134.6	147.7
Other overseas	77.4%	47.9	22.8	29.0	27.0
Domestic Irish tourists	29.8%	232.2	200.9	203.9	178.8
Northern Irish tourists	103.6%	16.7	19.9	12.8	8.2
TOTAL Tourist Expenditure	25.1%	868.2	757.6	700.8	694.0

(source: Failte Ireland Regions South West Tourism Report 2004)

### *Per capita expenditure in Cork and Kerry*

As the following chart shows, average expenditure per visitor to Cork and Kerry is significantly lower than it is across Ireland, with the exception of domestic tourists, who spend more on their visits to Cork and Kerry than elsewhere. The average American visitor spends 50% less in Cork and Kerry than they do on their average Irish trip.



### Length of stay

Business visitors stayed an average of 5.6 nights in Ireland during 2003, and holiday visitors an average of 7.1 nights.

Visitors from Britain, who average 5.2 nights in Ireland, and those from mainland Europe (average 11.1 nights) or North America (10 nights) spend very different amounts of money per night of stay in Ireland. Given the fact that over 850,000 business visits were made in 2003 to Ireland, and that these average under 6 nights, it is likely that most of these business visitors are from Britain, and that they are spending much more per night than others, pushing up the average expenditure for British visitors.

2003	Expenditure per day	Per capita expenditure	Number of nights
		€	
Visitors arriving from Britain	€96	497	5.2
Visitors arriving from Europe	€48	530	11.1
Visitors arriving from the Americas	€61	614	10.0

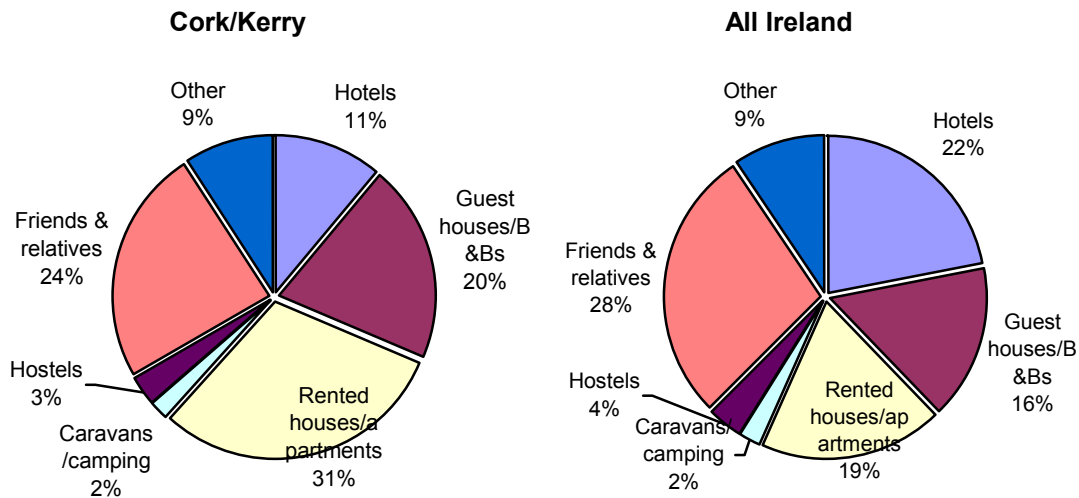
(source: CSO online direct database)

Overseas tourists averaged 6 nights in the South West in 2003, while holiday-makers only spent 5 nights in the area.

### Bed Nights

As the following table shows, in 2003, there were almost 47,000 bed nights booked by overseas visitors to Ireland, of which more than a quarter were among friends and relatives, and almost a quarter in hotels. B&Bs and guesthouses accounted for 16% and rented accommodation for 19%. For Cork and Kerry, there were over 9,000 bed nights (19% of the Irish total), and the distribution of those nights was much more skewed towards B&B's/guest houses and rental accommodation and away from hotels.

While the overall number of bed nights for overseas visitors to Ireland rose by 5.6% between 2002 and 2003, the relative proportions for each type of accommodation didn't change much. In fact, between January and September 2003 and the same nine month in 2004, the number of bed nights across Ireland has remained absolutely the same (to within 10!).



	Cork/Kerry		Ireland			
	%	2003	%	2003	%	2002
Total bed nights	100	9,055	100	46,846	100	44,339
Hotels	11	996	22	10,278	23	10,199
Guest houses/B&Bs	20	1,811	16	7,470	16	7,122
Rented houses/apartments	30	2,717	19	8,744	19	8,350
Caravans/camping	2	181	2	1,077	2	1,056
Hostels	3	272	4	1,709	4	1,580
Friends & relatives	24	2,173	28	13,122	27	12,012
Other	9	815	9	4,446	9	4,020

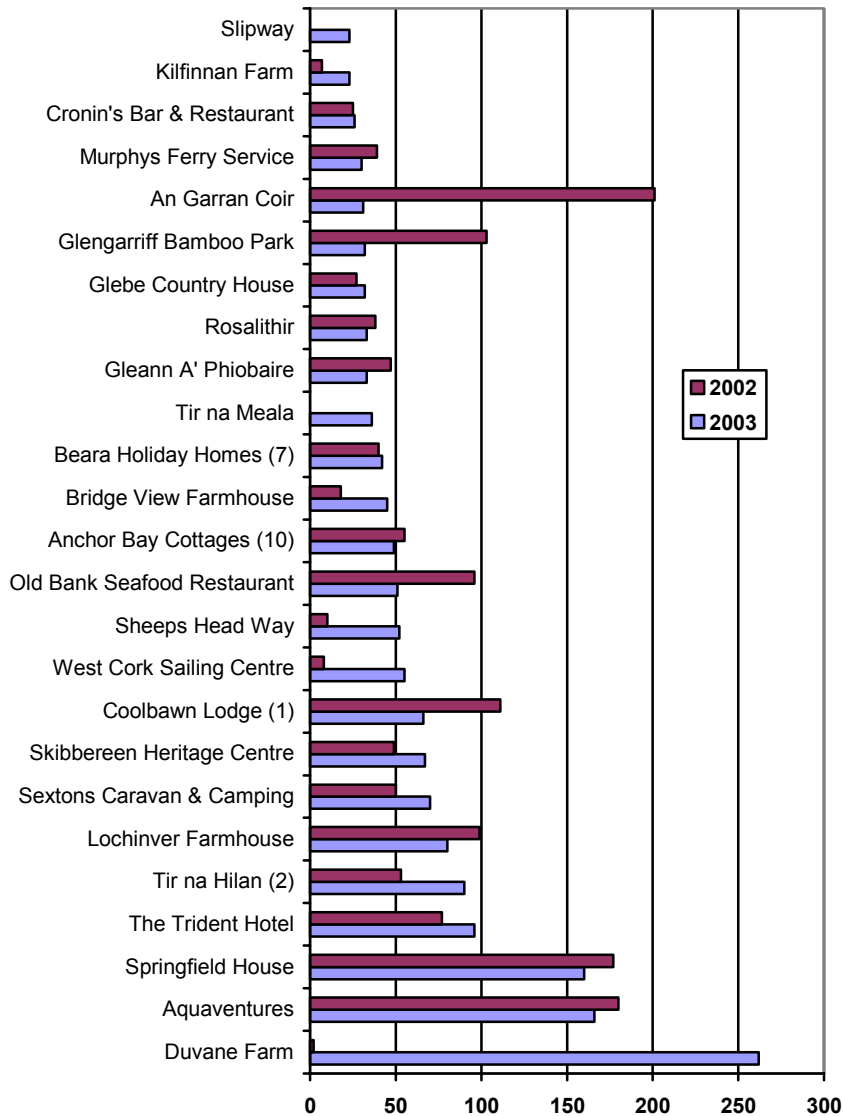
(source: CSO online direct database)

## RESULTS OF THE WEST CORK TOURISM SURVEY

### Cards returned

2049 cards were returned in 2004, down 55 from the 2003 level of 2090. This is against a background of a slight decline in tourist numbers to the South West in the same period. The number of establishments returning cards in 2004 was **66**, up from 58 in 2003 and 43 in 2002. Of the 2049 returns, 588 came from the top 3 establishments (29%).

### Over 20 returned: (number in brackets=no. of self-catering units)

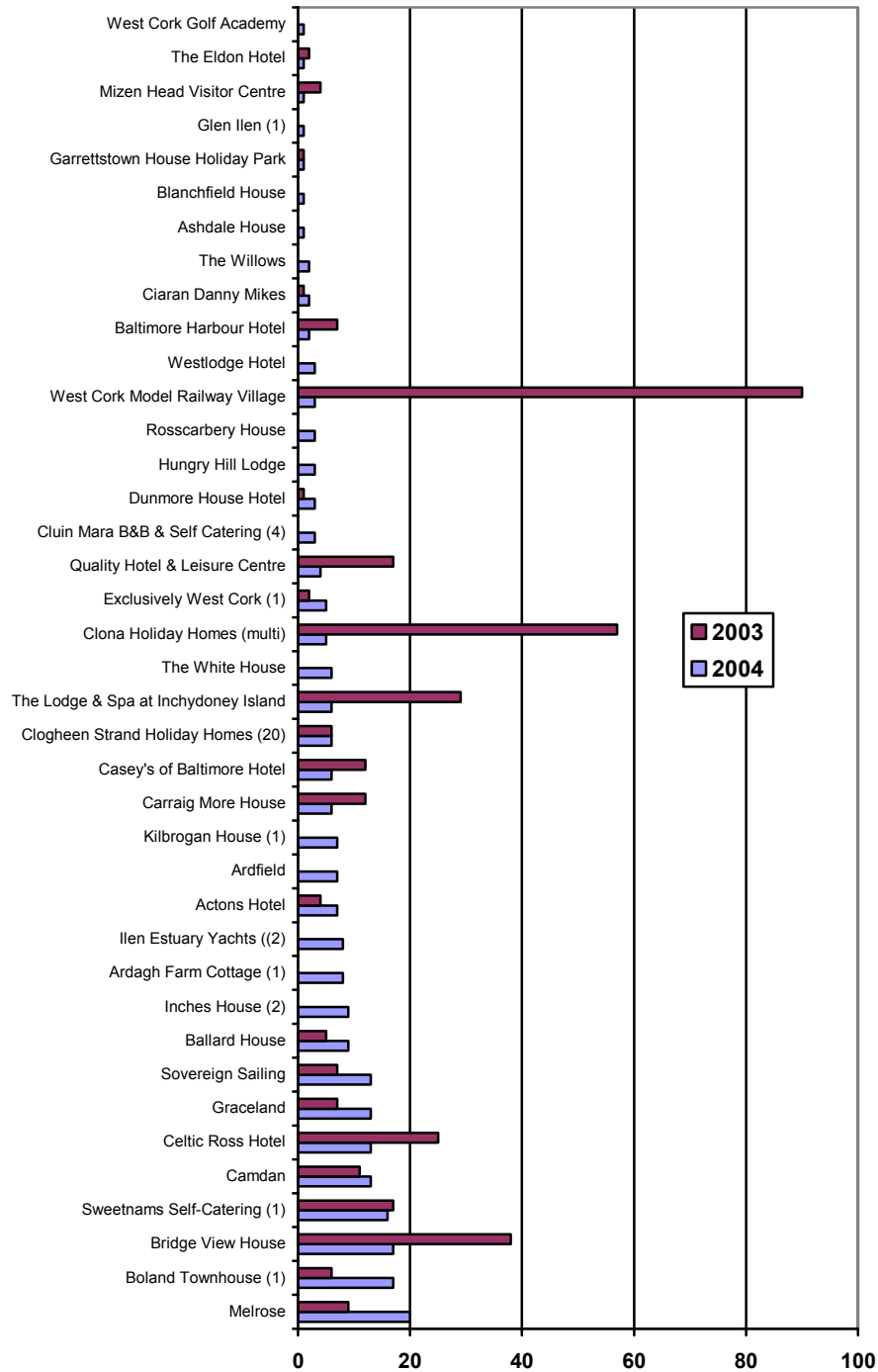


### Top three returns:

1. **Duvane Farm 262 (2 in 2003)**
2. **Aquaventures 166 (180 in 2003)**
3. **Springfield House 160 (177 in 2003)**

The average number of cards returned per establishment in 2003 was 29, up from 27 in 2003, and an increase of 52% over the level in 2001. As in 2003, 25 establishments returned more than 20 cards each, 13 of which increased their number of returns.

**Twenty or less returned (number in brackets=no. of self-catering units)**



24 of the 42 establishments returning 20 or fewer cards in 2004 have improved their rate of returns this year compared to 2003.

The following list of establishments did not return any response cards in 2004:

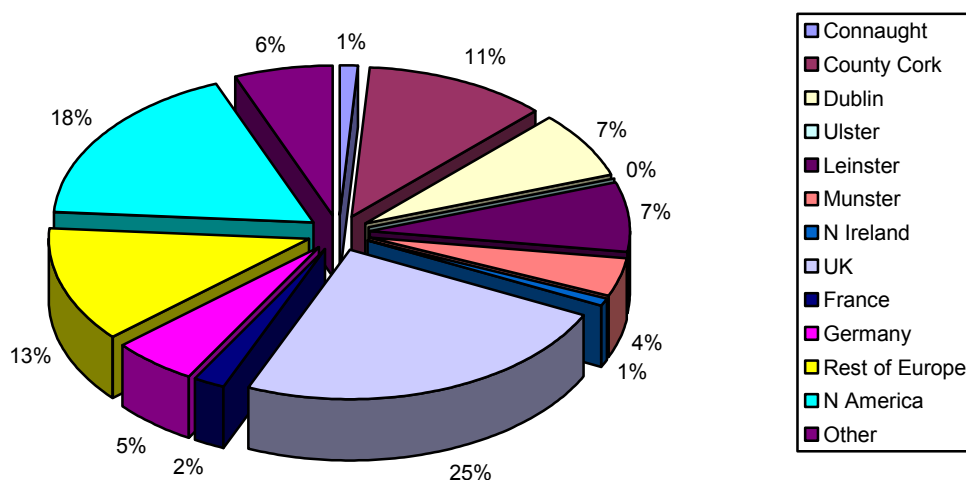
Seaview (2 units)  
Kilravock Gardens  
Herons Cove  
Twelve Arch Hotel  
Chart House  
Allihies Holiday Homes (8 units)  
West Cork Equine Centre  
The Old Bank House (retired)

It is important to note that the information recorded is based solely on the responses received and information contained in the response cards. However, the overall level of response is statistically relevant and provides a snapshot of satisfaction or otherwise with regard to individual establishments. To some degree the findings can be skewed by extremely high returns from some establishments and low returns from others. Members continuing to participate in the regional brand should endeavour to achieve a reasonable level of response in order to allow customer satisfaction to be determined.

## Origin of visitors

Based on the cards returned in 2004, a quarter of all visitors to West Cork were from Britain, and a further 18% from North America. These visitors are generally the most likely to complete consumer response cards. Domestic tourism represented the single largest group of visitors, with 32% of the total – one in three of these being local County Cork visitors (who would tend not to stay any length of time in paid accommodation) and one in four from Dublin.

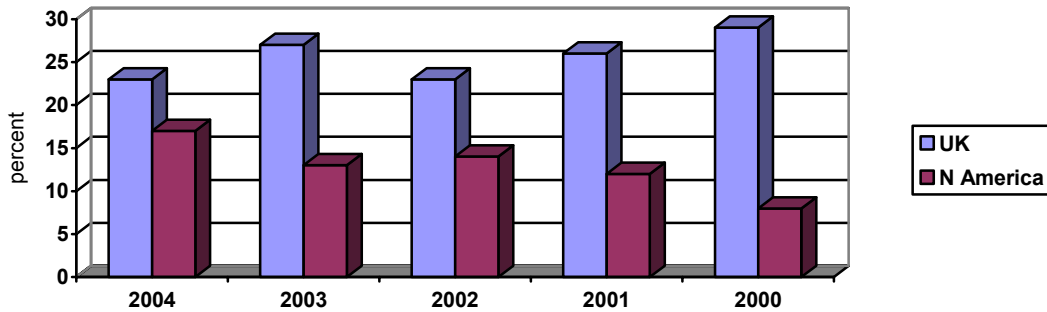
*Origin of visitors to West Cork 2004*



Origin – all visitors	2004	2003	2002	2001	2000
Base	2048	2090	1539	1254	817
	%	%	%	%	%
Connaught	1	1	2	2	1
County Cork	11	12	8	9	10
Dublin	7	6	9	8	7
Ulster	*	1	2	1	0
Leinster	7	6	8	6	7
Munster	4	6	5	7	6
Total Irish Visitors	32	32	34	33	31
N Ireland	1	2	2	3	4
UK	23	27	23	26	29
France	2	3	5	4	5
Germany	5	6	9	6	5
Rest of Europe	12	10	8	9	9
N America	17	13	14	12	8
Other	6	3	2	3	4

Over the last five years, the profile of visitors to West Cork has not changed much in this respect, with domestic tourism remaining around the 33% mark. The proportion of visitors to West Cork from North America is rising, however, and the proportion from Britain is falling.

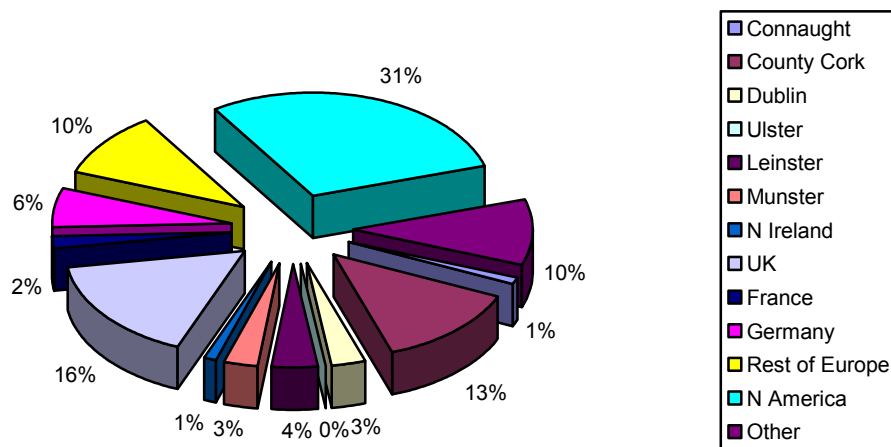
**Proportion of all visitors to West Cork from Britain and North America between 2000 and 2004**



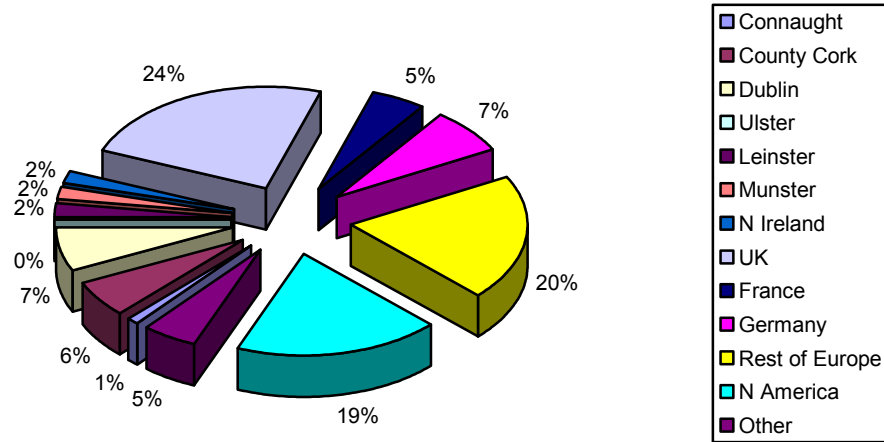
**Length of stay in West Cork by origin of visitors**

The following chart shows the origin of visitors to West Cork in 2004, selected among those spending only one night in the area. This chart should be compared to the following chart which looks at the origin of visitors staying in the area for more than a week. The North American tourists to West Cork, which we have already seen are on the increase, are much more likely to stay just one night, suggesting that they are travelling through as part of a national trip, while those from Britain and Europe are tending to stay for at least a week. 13% of visitors staying one night are from County Cork, compared to only 6% who stay more than a week.

**Origin of single night visitors to West Cork 2004**



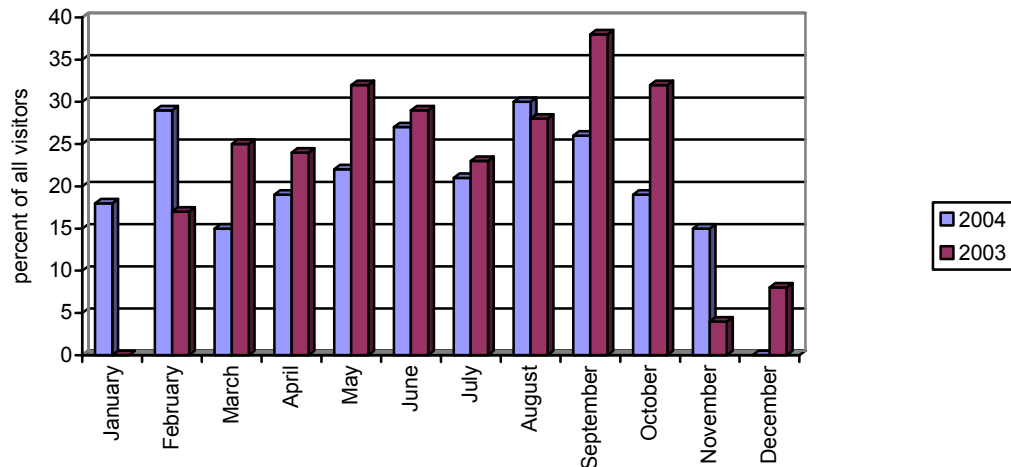
### Origin of visitors spending more than a week in West Cork 2004



### Time of year visiting West Cork by origin of visitor

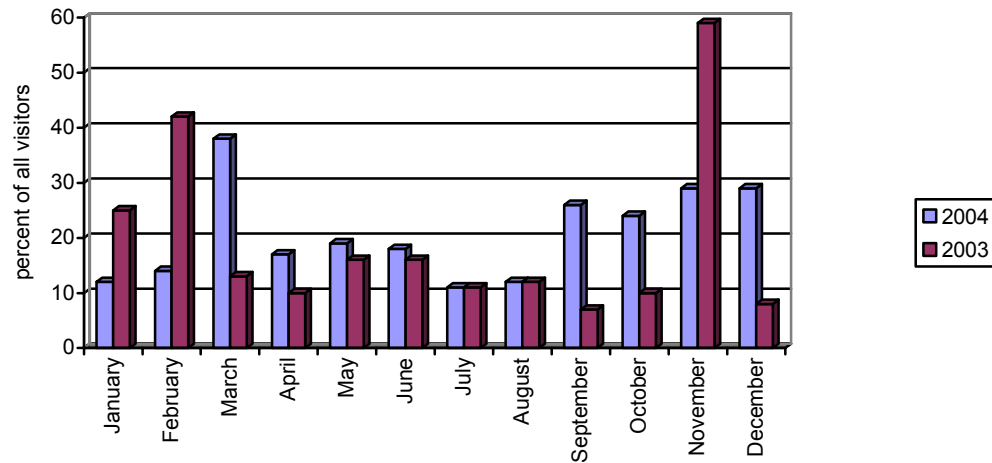
The next two charts show the pattern of visiting through the year in 2003 and 2004 between UK and North American visitors. These are interesting to compare, as it is clear that visitors from Britain are most likely to visit in the high season, while those from North America favour spring and autumn months. There have been some shifts between 2003 and 2004. In 2003, the UK visitors represented a large proportion of all visitors in May, September and October, while in 2004, they represented a large proportion of the February and August visitors.

### British Visitors to West Cork by time of year (% of all visitors) 2003-2004



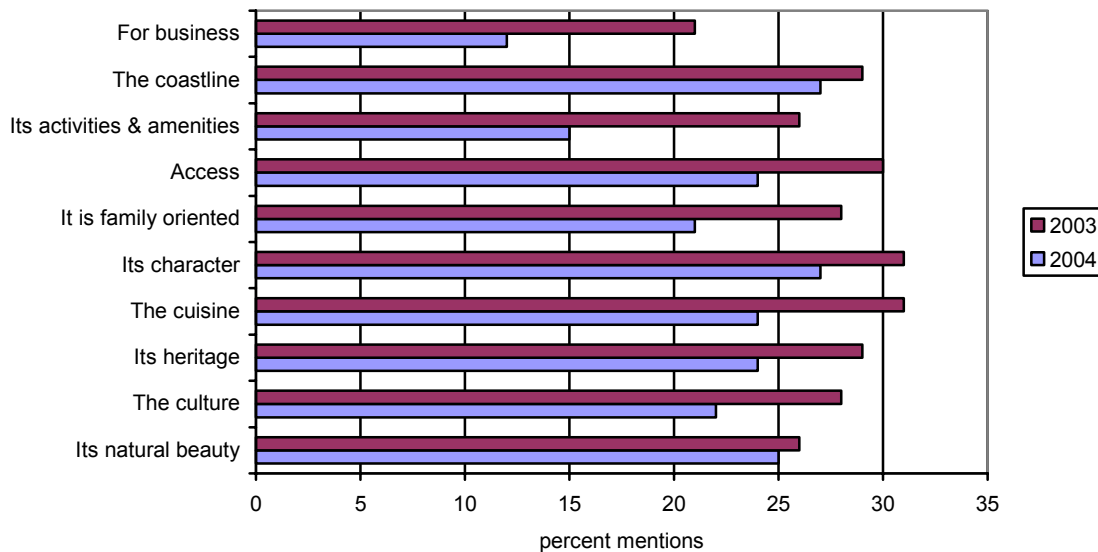
Likewise, in 2003, North Americans accounted for more than half of all visitors to West Cork in November, and 40% in February, but in 2004, March was the month in which they were the largest proportion of visitors.

**North American Visitors to West Cork by time of year (% of all visitors) 2003-2004**



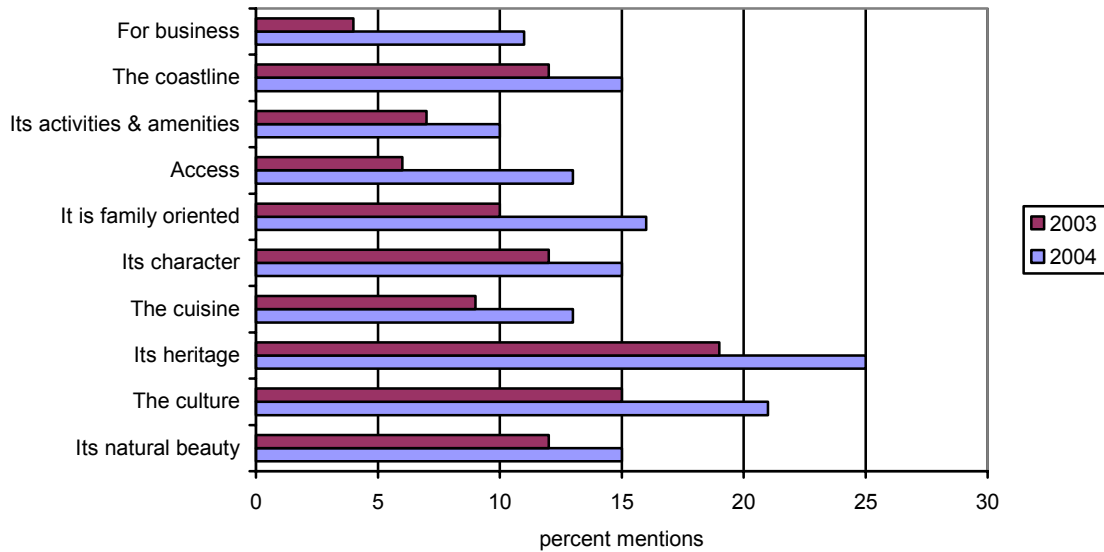
UK visitors to West Cork chose it in 2003 and 2004 because of its character, its natural beauty and the coastline. In 2003, it was also chosen for its heritage, family orientation and its activities in amenities, though these last two were not nearly so often mentioned in 2004. Business visits to West Cork in 2004 were mentioned by far fewer UK visitors to the area than in 2003.

**Reasons for choosing West Cork among British visitors 2003-2004**



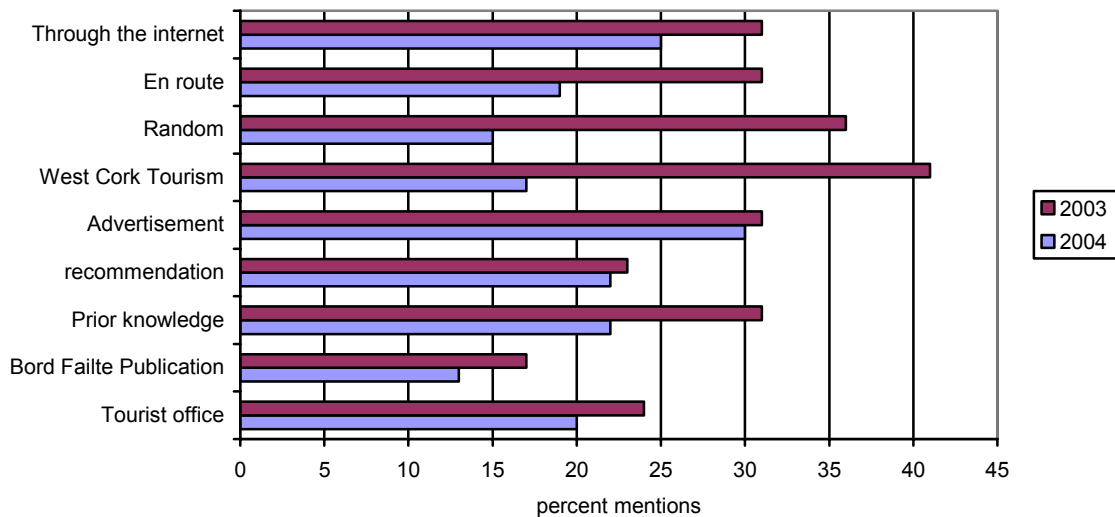
North American visitors were much more likely to mention the area’s heritage than visitors from other countries, both in 2003 and 2004, but West Cork’s natural beauty, its culture, its coastline and character and its family orientation also feature strongly this year among Americans.

### Reasons for choosing West Cork among North American visitors 2003-2004



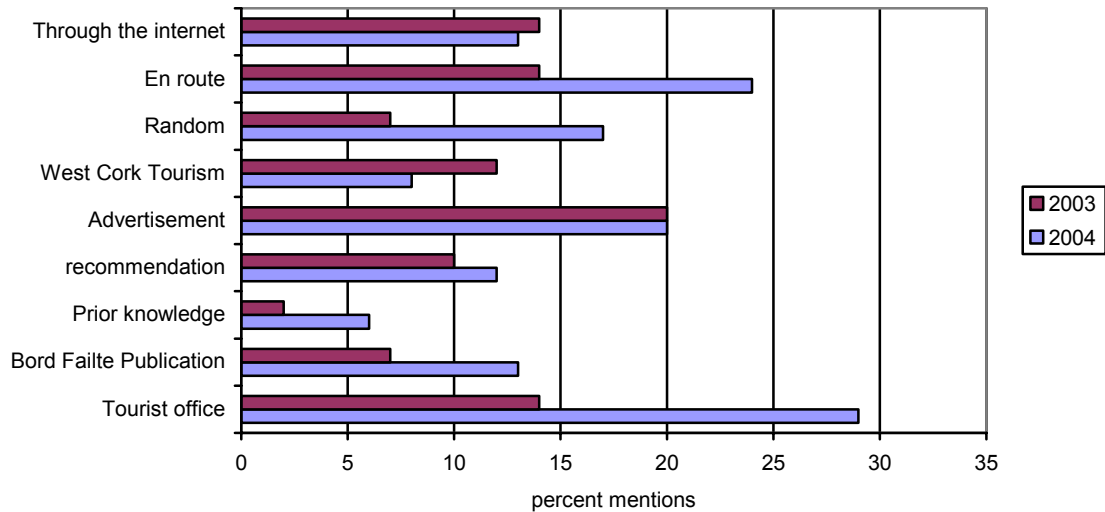
It is also interesting to look at how visitors selected the establishments they stayed in or visited. Visitors from Britain tended to respond to advertising in 2004 as well as 2003, while the West Cork Tourism services were much less likely to be mentioned in 2004 than 2003. The internet doesn't seem to be playing a larger part in the process this year for UK tourists than in 2003. It is possible that prior knowledge and recommendation means that people tend not to consult promotional material, the internet, etc.

### Method of selection of establishment among British tourists 2003-2004



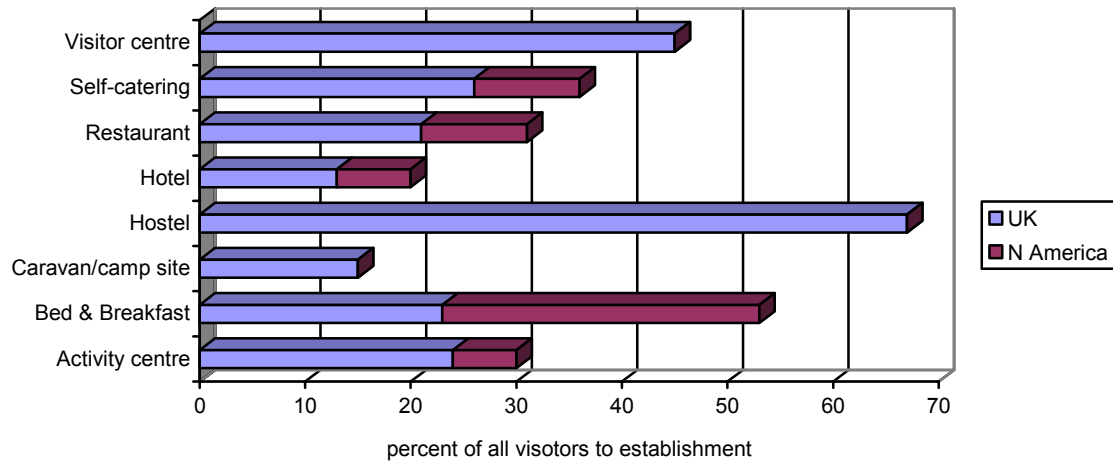
In 2004, North American visitors were more likely than others to use the tourist office to book their visit, and also quite likely to visit West Cork en route to somewhere else, or by some random discovery. Like their UK counterparts, they aren't flocking to the Internet for their bookings more than in 2003.

### Method of selection of establishment among North American tourists 2003-2004



Two thirds of all hostel-goers in 2004 were from Britain, and almost half of all those visiting Visitor Centres. Bed and Breakfast accommodation was equally popular with UK and American visitors, who between them made up more than half of all visits to this type of establishment. It is interesting that more British than American visitors stayed in hotels in West Cork in 2004, though there were more British than North American visitors visiting the area in total.

### Type of accommodation/establishment used by British and North American visitors in 2004



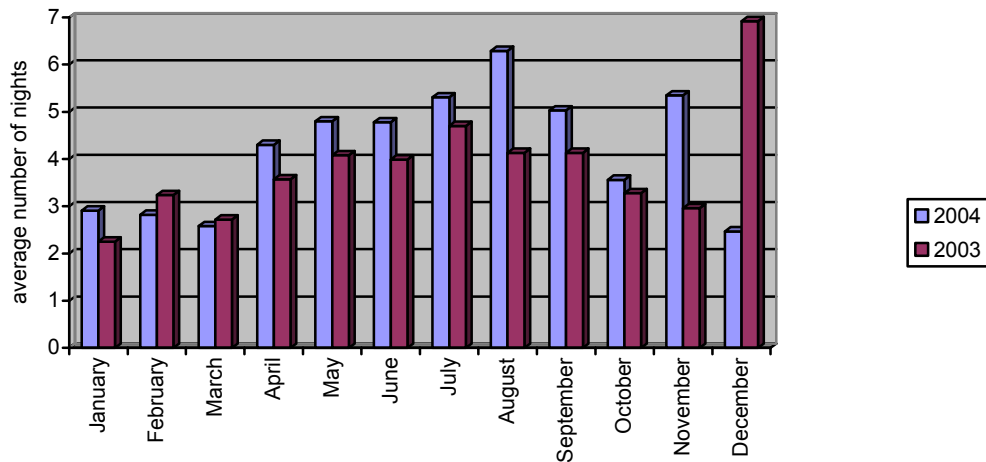
## Length of Stay

In 2004, the average length of stay in West Cork for all visitors was 5 nights, although one in five stayed only one night and 17% stayed more than a week. The last five years have seen the average remain at or around 5 nights, although the short stay visitor numbers are slightly increasing. This may well reflect the tendency to take regular short breaks.

	2004	2003	2002	2001	2000
Base	2049	2090	1539	1252	816
	%	%	%	%	%
Day trip only	2	18	5	2	5
Stayed one night	25	17	22	23	13
Stayed two nights	13	10	13	16	17
Stayed 3-7 nights	36	35	37	36	35
Stayed 8-14 nights	12	10	12	12	17
Stayed more than 14 nights	5	2	3	4	3
AVERAGE NIGHTS	5.0	4.06	4.68	4.88	5.34

## Length of stay by time of year

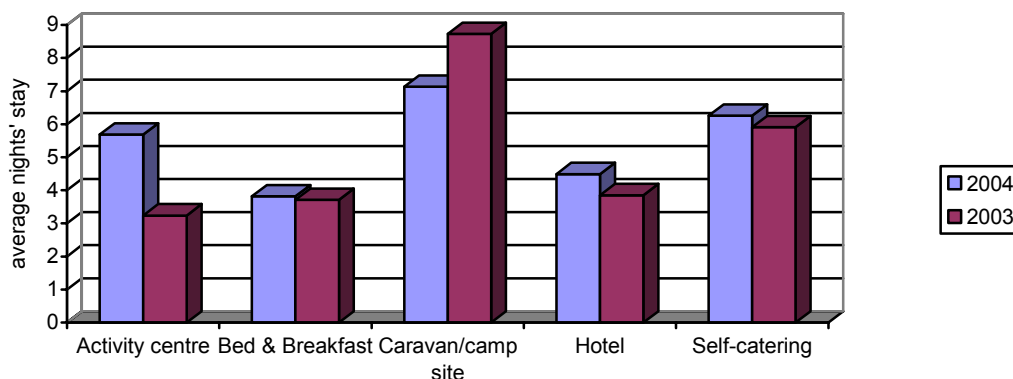
Between 2003 and 2004, the average number of nights spent in West Cork tended to rise in the summer months, in keeping with the traditional family holiday, and drop off towards the year end. In each month, average lengths of stay increased marginally between 2003 and 2004, although this has not been the case in all the last five years, as can be seen in the full table below. In each year, small numbers of cards returned for November and December have generated skewed results in these months.



<b>Average nights</b>	<b>2004</b>	<b>2003</b>	<b>2002</b>	<b>2001</b>	<b>2000</b>
Annual average	5.04	4.06	4.68	4.88	5.34
January	2.91	2.25	0	3.58	2.33
February	2.82	3.24	0	4.26	1.67
March	2.58	2.72	3.89	2.69	3.81
April	4.30	3.57	3.69	3.52	4.69
May	4.80	4.08	3.59	5.04	4.62
June	4.78	3.99	5.41	6.00	4.82
July	5.31	4.70	5.08	5.48	5.36
August	6.29	4.13	4.62	4.47	5.90
September	5.03	4.13	4.25	5.27	6.06
October	3.56	3.28	3.00	3.75	5.85
November	5.35	2.96	3.39	3.00	4.00
December	2.47	6.92	4.38	5.00	1.67

### Length of stay by accommodation type

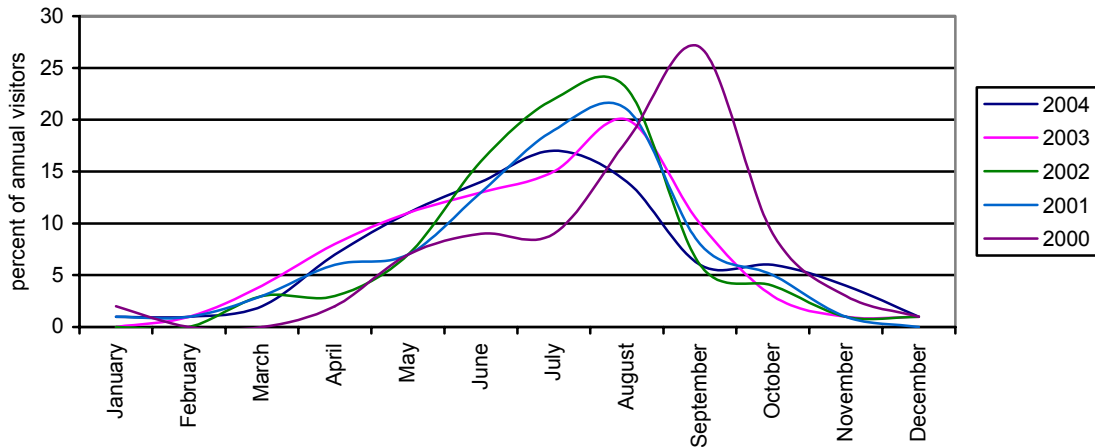
The following chart compares the average number of nights stayed in West Cork, against the type of establishment visited in 2003 and 2004 Cork. It is clear that cards completed by visitors to day-time attractions, such as visitor centres, give details about the visitors' stay in West Cork, and not their time at the specific establishment. Those staying in caravans or camping tended to stay about a week, while those staying in B&Bs, guest houses and hotels stayed about 4 nights. Self catering stays of about 6 nights have remained the same for the last two years.



	<b>2004</b>	<b>2003</b>	<b>2002</b>	<b>2001</b>	<b>2000</b>
Bed & Breakfast	3.82	3.71	4.02	4.11	4.63
Caravan/camp site	7.13	8.73	7.39	Na	Na
Hotel	4.49	3.85	4.35	3.46	4.20
Self-catering	6.26	5.91	6.65	7.10	9.68

## Time of year visited

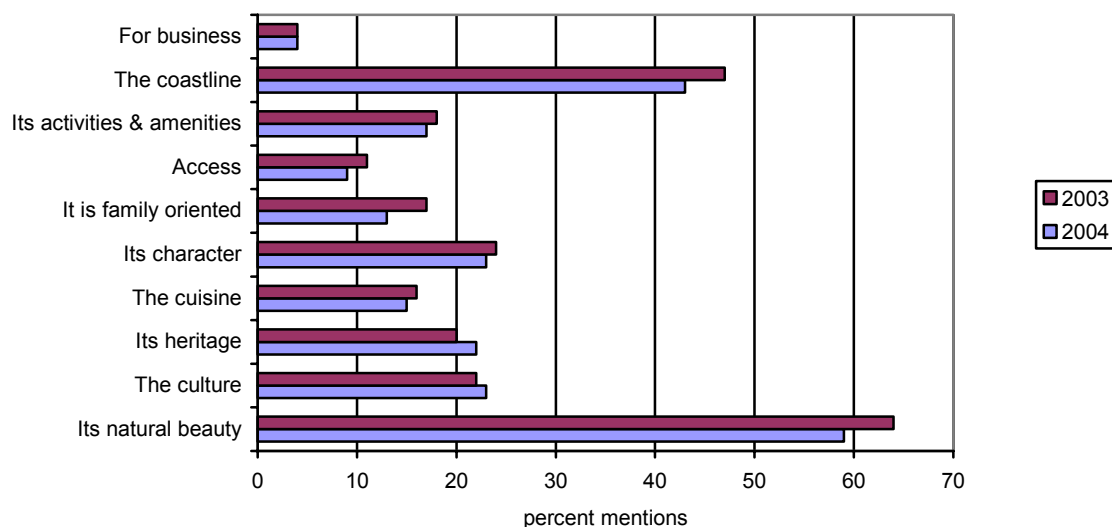
As has already been illustrated, the proportion of visitors rises during the summer high season, and in 2004, this was mainly between April/May and August. Interestingly, in 2000, this was more clearly between June and October, and over the last five years, the 'season' has definitely moved towards spring, perhaps in line with changing weather conditions.



	<b>2004</b>	<b>2003</b>	<b>2002</b>	<b>2001</b>	<b>2000</b>
	2049	2090	1539	1253	816
	%	%	%	%	%
January	1	*	0	1	2
February	1	1	*	1	*
March	2	4	3	3	*
April	7	8	3	6	2
May	11	11	7	7	7
June	14	13	16	13	9
July	17	15	22	19	9
August	14	20	23	21	18
September	6	10	6	8	27
October	6	3	4	5	9
November	4	1	1	1	3
December	1	1	1	*	1
Not stated	16	15	15	14	12

## Reasons for visiting West Cork

Between 2003 and 2004 there was remarkably little change in visitors' views as to why they visit West Cork. The natural beauty of the area is a predominant factor, particularly its coastline. All other reasons are mentioned by around one in five respondents to the survey

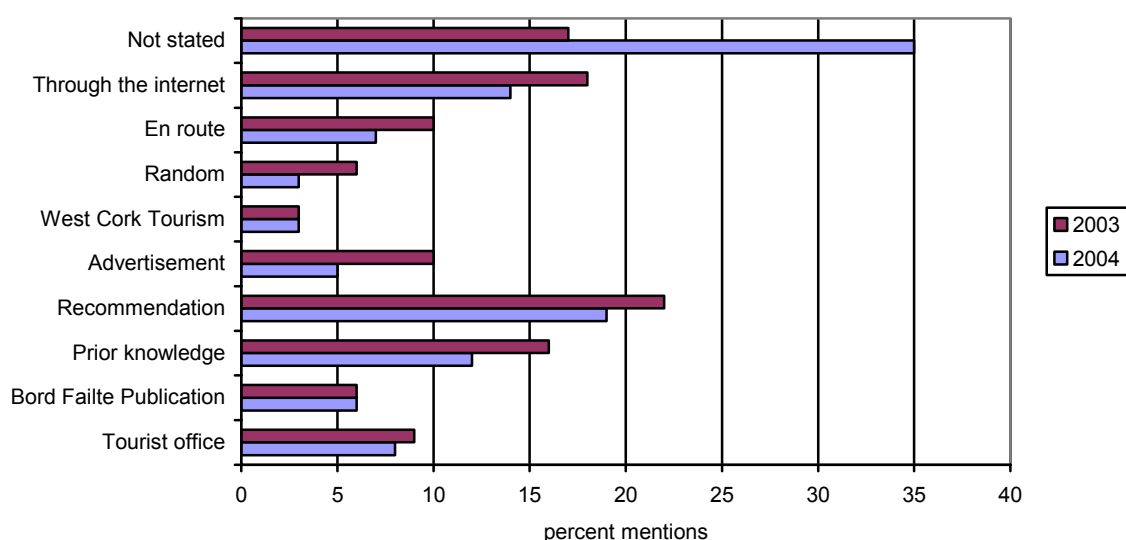


The longer term trends are also remarkably stable. It isn't surprising that the natural charms of West Cork are equally important every year, but some of the other factors are within the control of West Cork's tourist industry. The number of tourists mentioning West Cork's family orientation is declining, as is the number mentioning its accessibility, despite the national roads programme. Consideration of West Cork's cuisine, its culture and heritage and its activities and amenities have remained stable over the last five years. There is an increasing (though small) number of business visitors to West Cork

	2004	2003	2002	2001	2000
Base	2049	2090	1539	1253	817
	%	%	%	%	%
Its natural beauty	59	64	67	69	69
The culture	23	22	24	18	24
Its heritage	22	20	21	20	24
The cuisine	15	16	16	19	16
Its character	23	24	27	29	29
It is family oriented	13	17	18	18	19
Access	9	11	13	15	15
Its activities & amenities	17	18	20	16	19
The coastline	43	47	48	49	52
For business	4	4	2	2	*

## Method of selecting accommodation/establishment

While one in three of those surveyed in 2004 did not answer this question (double the number in 2003), the main method in both years visitors used for selecting their accommodation and places to visit in West Cork was by recommendation. Prior knowledge of the area and use of the internet were both used by around one in six visitors, while advertising seems to have become less popular in 2004 than it was in 2003 as a source of information.



In terms of the five-year trend, it is clear that Bord Failte publications are having a diminishing role in the process of choosing places to stay and visit, as is advertising. The internet is increasingly valuable, as one might expect, but its rise in popularity is not meteoric, considering the speed of growth in online booking for holiday and international travel.

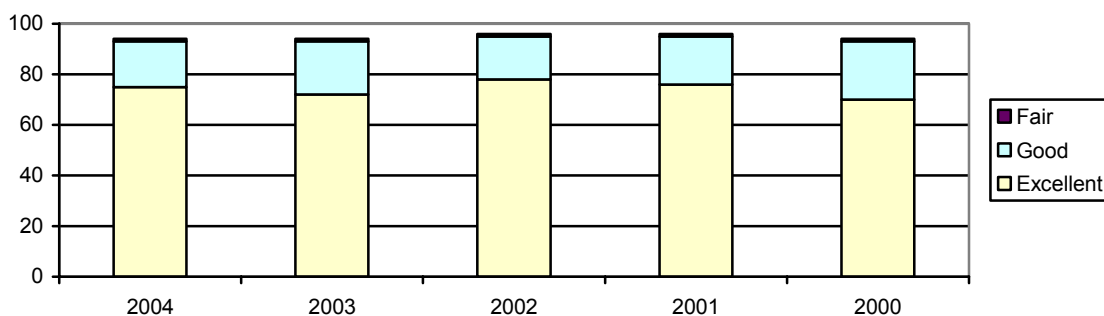
	2004	2003	2002	2001	2000
	2049	2090	1539	1254	817
	%	%	%	%	%
Tourist office	8	9	13	11	9
Bord Failte Publication	6	6	9	12	13
Prior knowledge	12	16	17	16	15
Recommendation	19	22	21	20	20
Advertisement	5	10	9	13	15
West Cork Tourism	3	3	2	3	4
Random	3	6	4	5	9
En route	7	10	9	10	13
Through the internet	14	18	14	11	10
Not stated	35	17	17	16	13

## Ratings of Accommodation/establishment

Visitors to West Cork rated the individual establishment in which they stayed or visited on a series of scales or performance ratings. Each consisted of a four-point scale, from Excellent to Poor, and each point on the scale has been given a value (from 4 down to 1) and a mean score on the rating is given in the tables below. Ratings for individual establishments will be supplied to those establishments separately from this report, which aggregates the data. It is apparent that the scales tend to bunch responses at the top – the vast majority rate each establishment as ‘excellent’ on each measure, so that this section doesn’t offer fast-changing averages, and differences between ratings are small.

## Product quality

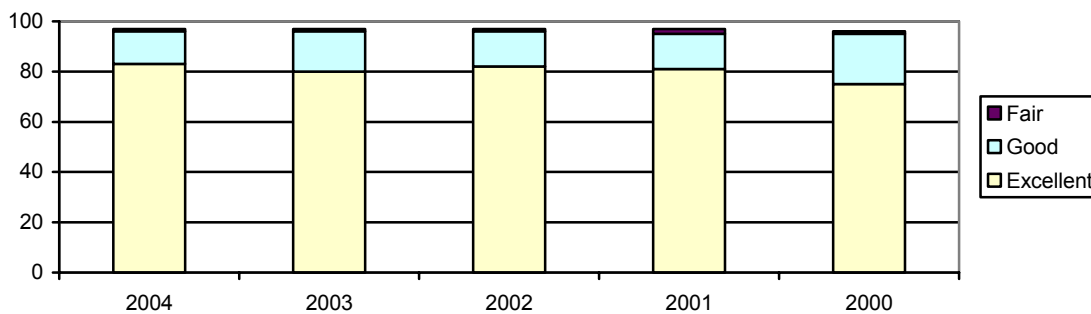
Three quarters of visitors give their establishment an excellent rating for product quality and a further 18% a good rating. This has not changed significantly since 2000.



Product quality	2004	2003	2002	2001	2000
	2049	2090	1539	1254	817
	%	%	%	%	%
Excellent	75	72	78	76	70
Good	18	21	17	19	23
Fair	1	1	1	1	1
Poor	*	*	*	*	*
Not stated	6	5	3	4	6
Mean score	3.79	3.74	3.79	3.78	3.73

## Service quality

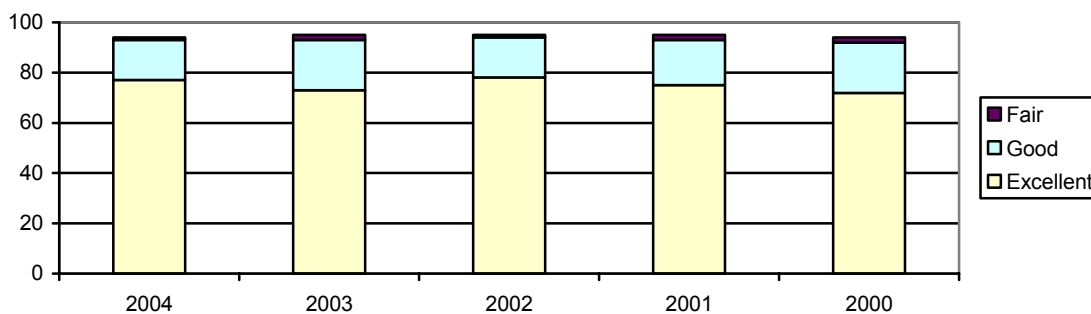
Service quality ratings are higher than product quality, with 83% of visitors in 2004 giving service an excellent rating and a further 13% a good rating. This is an improvement on the 2000 figures, and it is two years since anyone gave their establishment a 'poor' rating.



Service quality	2004	2003	2002	2001	2000
	2049	2090	1539	1254	817
	%	%	%	%	%
Excellent	83	80	82	81	75
Good	13	16	14	14	20
Fair	1	1	1	2	1
Poor	*	*	1	*	*
Not stated	4	3	2	3	3
Mean score	3.85	3.80	3.81	3.82	3.76

## Efficiency

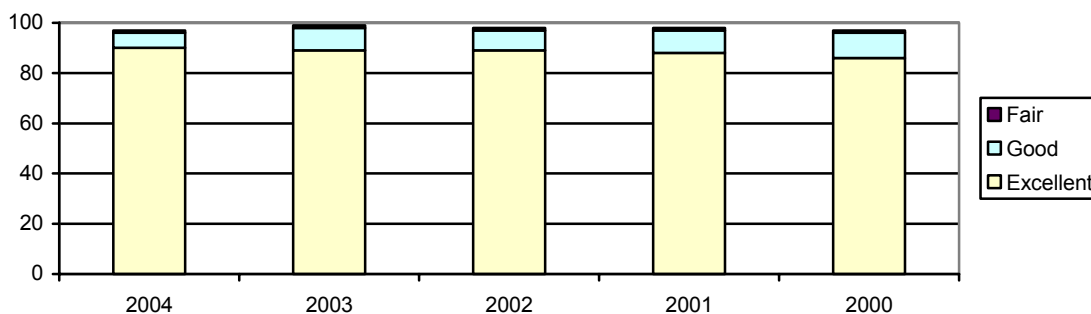
The levels of efficiency have improved in West Cork establishments since 2000, and more than three quarters of visitors consider them excellent in 2004.



<b>Efficiency</b>	<b>2004</b>	<b>2003</b>	<b>2002</b>	<b>2001</b>	<b>2000</b>
	2049	2090	1539	1254	817
	%	%	%	%	%
Excellent	77	73	78	75	72
Good	16	20	16	18	20
Fair	1	2	1	2	2
Poor	*	*	*	*	*
Not stated	6	5	4	4	6
Mean score	3.81	3.74	3.79	3.75	3.74

## Friendliness

There is almost universal praise for the friendliness of the establishments in West Cork, with 96% of visitors rating it excellent or good in 2004. This has improved slightly in the last five years, with a larger proportion giving the excellent rating in 2004 than 2000

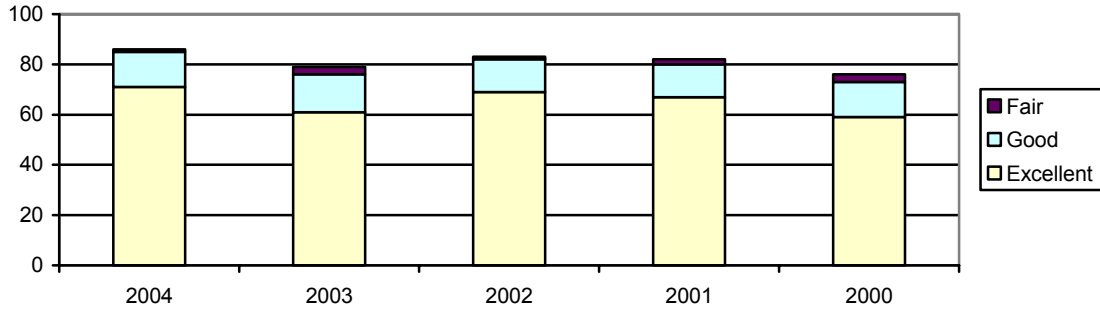


<b>Friendliness</b>	<b>2004</b>	<b>2003</b>	<b>2002</b>	<b>2001</b>	<b>2000</b>
	2049	2090	1539	1254	817
	%	%	%	%	%
Excellent	90	89	89	88	86
Good	6	9	8	9	10
Fair	1	1	1	1	1
Poor	*	*	*	*	*
Not stated	3	2	1	2	3
Mean score	3.92	3.89	3.90	3.89	3.88

The high score in the above three categories reflect the commitment to and interest in ongoing training. Clearly, the establishments have benefited from this training and have applied it to the operation of their establishment.

## Food

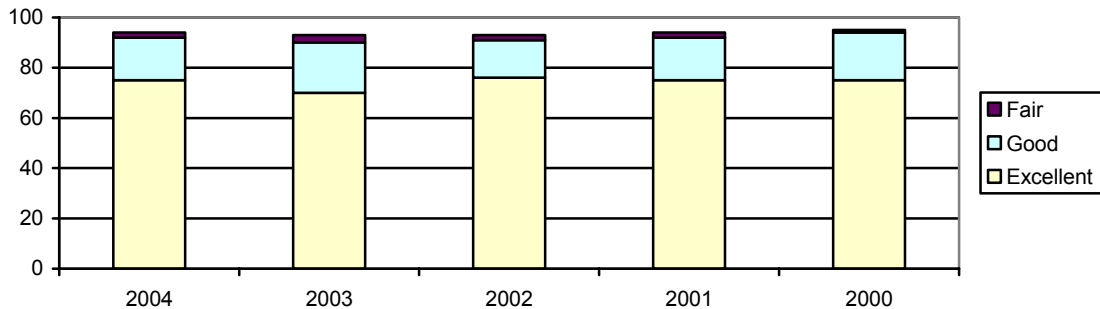
While the overall ratings for food are less positive than for the previous measures, with 71% rating the food as 'excellent' and 14% as 'good' in 2004, there is a distinct upward trend in this rating through the last five years. In 2000, the scores were only 59% excellent and 14% 'good'. Again, in relation to training, an emphasis has been placed on the use of local foods and this has notably been achieved by the farmhouse and B & B sectors in particular.



Food	2004	2003	2002	2001	2000
	2049	2090	1539	1254	817
	%	%	%	%	%
Excellent	71	61	69	67	59
Good	14	15	13	13	14
Fair	1	3	1	2	3
Poor	*	*	*	*	*
Not stated	14	20	17	18	25
Mean score	3.80	3.72	3.80	3.78	3.74

## Hygiene

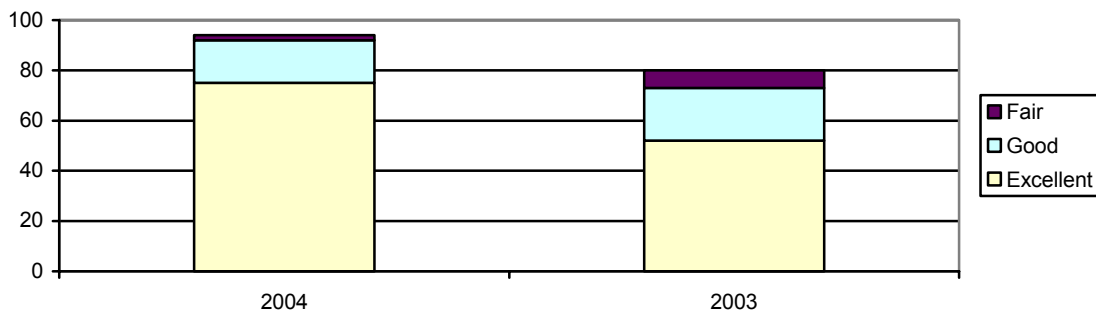
Ratings for the level of hygiene in the establishments surveyed in 2004 are high, with 92% of all visitors rating them as good or excellent. There has been no discernible change in this rating over the last five years.



<b>Hygiene</b>	<b>2004</b>	<b>2003</b>	<b>2002</b>	<b>2001</b>	<b>2000</b>
	2049	2090	1539	1254	817
	%	%	%	%	%
Excellent	75	70	76	75	75
Good	17	20	15	17	19
Fair	2	3	2	2	1
Poor	*	1	*	*	*
Not stated	6	6	6	6	5
Mean score	3.77	3.70	3.78	3.77	3.77

### Value for money

The final measure – value for money – was introduced in 2003, and has seen a substantial improvement in the last year, with the 'excellent' rating being given by 75% of respondents in 2004, up from 52% in 2003. This clearly reflects the commitment on behalf of establishments to offer value for money. However, it is evident that value for money issues remain in general outside the control of the individual members, i.e. dining out, care hire, etc.



	<b>2004</b>	<b>2003</b>
	2049	2090
	%	%
Excellent	75	52
Good	17	21
Fair	2	7
Poor	*	1
Not stated	6	20
Mean score	3.77	3.55

## Performance ratings by type of establishment – 2004

The following table shows mean scores for each performance rating by type of establishment booked in 2004 (excluding hostels and visitors centres, which had small bases). It is interesting that the bed and breakfasts achieved the highest ratings for most aspects of performance, closely followed by self-catering accommodation. Hotels did not score so highly on product and service quality, efficiency, their food or hygiene, or value for money, however, this is from a comparatively low level of responses. Of most concern were the low averages for restaurants on value for money, and hygiene. Other low scores can be seen for the value for money of activity centres and friendliness of restaurants.

	Activity centre	B&B/Guest house	Camping /caravan	Hotel	Rest-aurant	Self-cater
Base	419	900	71	147	79	389
Product quality	3.73	3.84	3.72	3.72	3.75	3.85
Service quality	3.82	3.93	3.78	3.75	3.58	3.87
Efficiency	3.77	3.88	3.70	3.69	3.58	3.84
Friendliness	3.93	3.96	3.94	3.79	3.66	3.94
Food	3.69	3.90	3.62	3.71	3.73	3.81
Hygiene	3.67	3.88	3.64	3.77	3.49	3.81
Value for money	3.56	3.79	3.66	3.68	3.38	3.78
Other	3.75	3.79	3.67	3.36	3.58	3.81

Comparing the ratings for Hotels, Bed & Breakfasts and Self Catering establishments, it can be seen that in all cases, Hotels are less well rated in West Cork than are the other two, with bed & breakfast accommodation generally receiving the highest scores.

