



West Cork LEADER Co-Op.

Tourism Survey 2004-2005 for West Cork Regional Branding Members

Report on main findings

Prepared by Adrian Wistreich
Kinsale Consultants, Olcote, Ballinacurra,
Kinsale, Co Cork
021 477 7758
adrianwistreich@eircom.net

Prepared for Jean O'Sullivan
West Cork LEADER Co-Op.
023/34035
jean@westcorkleader.ie

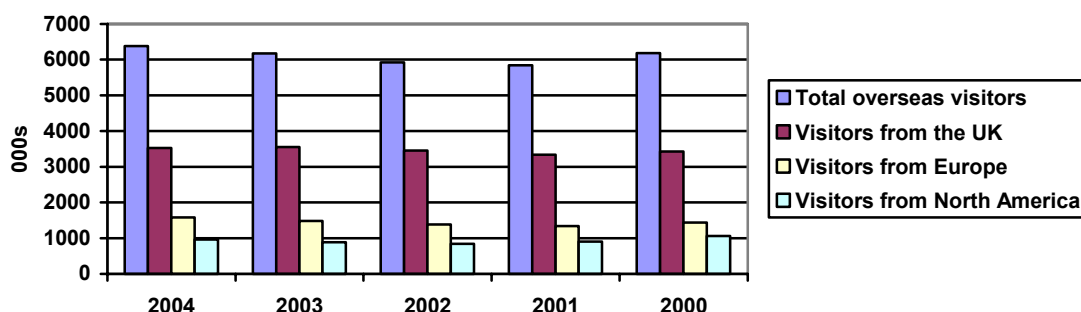
March, 2006

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 6.4 million overseas tourist visits to Ireland (this might include multiple visits by one tourist) in 2004, which was up by 3.3% from the 2003 level. As the following table shows, the numbers of visitors from Britain (55% of overseas tourists in 2004) have risen by 2.9% over the five years from 2000 to 2004, the latest full year for which CSO data is available. North American visitor numbers at 956,000 in 2004 still haven't returned to pre 9/11 levels (1.056 million in 2000).

Total visitor numbers 2000-2004



(source: Failte Ireland Tourism Facts 2004)

CSO estimates for the first seven months of 2005 show an overall increase of overseas visitors of 4% over the same period in 2004, with mainland European visitors constituting the most substantial growth, of 16% against January to July in 2004. British visitors only increased in number by 2% in this period against 2004.

	change	2005	2004	2003	2002
	2002-05	000s	000s	000s	000s
Total overseas visitors	+4%	3,782	3,625	3,456	3,354
Visitors from Britain	+2%	2,015	1,974	1,982	1,950
Visitors from Europe	+16%	1,063	916	845	789
Visitors from North America	-2%	545	556	506	478

(source: Failte Ireland Tourism Matters)

On a full-year basis, tourists from the rest of Europe (24.8% in 2004) have increased by 6.6% since 2003, and tourists from North America, representing 15.0% of all overseas tourists to Ireland in 2004, dropped by 10.2% in the last five years, from 16.5% of all overseas tourists in 2000. Nevertheless, 2004 is an improvement on 2002 levels, and an upward trend which seems to have plateaued in 2005.

	change	2004	2003	2002	2001	2000
	2000-04	000s	000s	000s	000s	000s
Total overseas visitors	+3.3%	6,384	6,178	5,919	5,840	6,181
Visitors from Britain	+2.9%	3,526	3,553	3,452	3,340	3,428
Visitors from Europe	+10.2%	1,582	1,484	1,378	1,336	1,436
Visitors from North America	-9.5%	956	892	844	903	1,056

(source: Failte Ireland Tourism Facts 2004)

The proportion of visitors to Ireland who said that business was their main reason for visiting remained constant at 13% in 2004. This was higher for mainland European visitors (18%) than for North Americans (&%) or British visitors (13%).

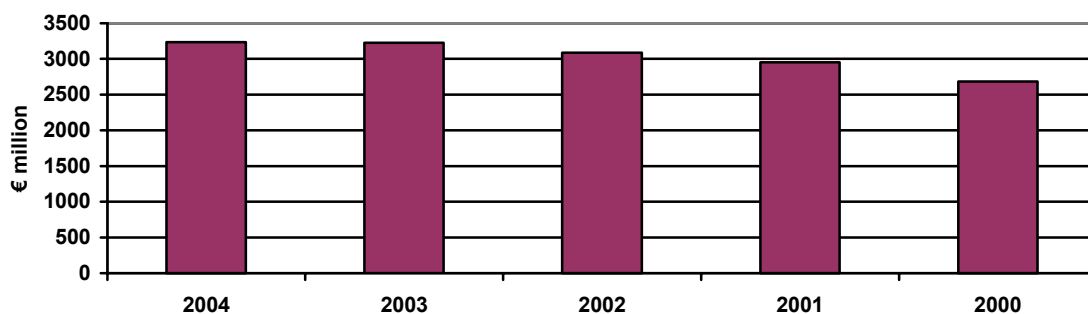
Tourist expenditure in Ireland

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 €3.235 billion expenditure (excluding international fares), visitors entering Ireland from Britain spend 39.4% of total overseas visitor expenditure in 2004, down from 40.8% in 2003, as their total expenditure dropped by 3.25% on the previous year. This is against an overall upward trend of 17% against the amount they spent in 2000, which should be set against the much smaller growth in numbers of 2.9% during this period.

American tourists spend 23.9% of the total, down 2% on 2003, but up 12% since 2000, against a 9.5% decline in numbers in this period. European tourists spend 28.8% of the total, but their expenditure rose 28% over the period 2000-2004.

Total visitor expenditure 2000-2004:

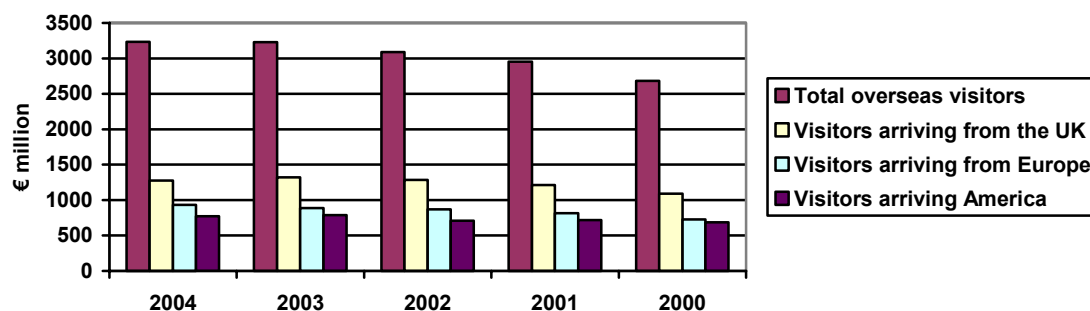
(source: Failte Ireland Tourism Facts)



	Rise	2004	2003	2002	2001	2000
	00-04	€ million	€ Million	€ million	€ million	€ million
Total overseas visitors	21%	3234.9	3,227.7	3,087.5	2,951.7	2,681.9
Visitors arriving from Britain	17%	1,276.1	1,319.1	1,283.3	1,210.6	1,087.7
Visitors arriving from Europe	28%	930.4	885.1	866.6	814.6	727.0
Visitors arriving America	12%	772.1	787.2	709.0	717.5	688.6

Visitor expenditure by region of origin:

(source: Failte Ireland Tourism Facts 2004)



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 €507 in 2004, up 16.8% on 2000, but just 0.3% from the level in 2001, despite inflation levels of 3-5% per year throughout this period. The average American tourist spent €808, up 23.9% on the 2000 level, but this was only 1.6% more than in 2001. In fact, the only real growth in revenues from overseas tourists in the last four years has been driven by volume, not expenditure per capita, which has declined in real terms.

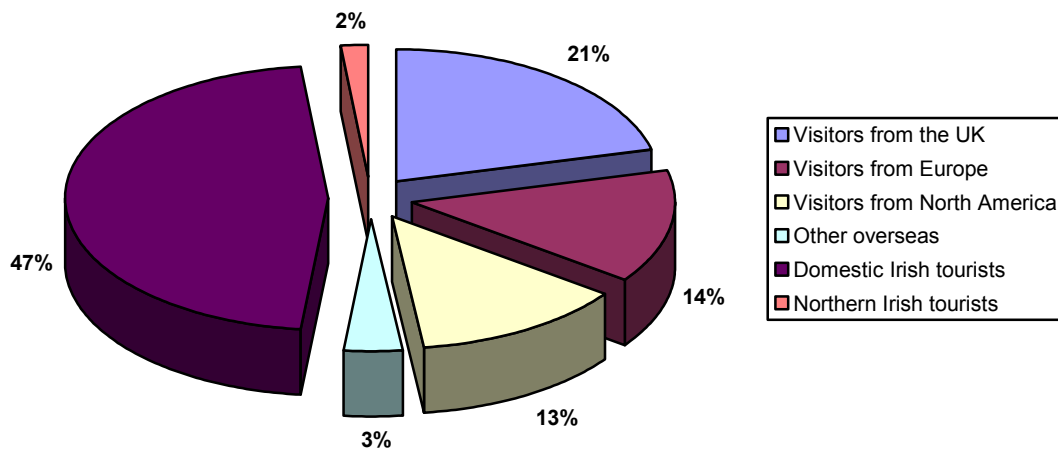
	rise	2004	2003	2002	2001	2000
	2000-04	€	€	€	€	€
Total overseas visitors	16.8%	507	522	522	505	434
Visitors arriving from Britain	14.2%	362	371	372	363	317
Visitors arriving from Europe	16.0%	587	596	629	610	506
Visitors arriving from the Americas	23.9%	808	882	851	795	652

Tourism to Cork and Kerry

Between 2000 and 2004, tourism to the South West rose from 2,917,000 visits to 3,057,000 (up 4.8%), which can all be attributed to growth in domestic tourist numbers while international tourist numbers have been dropping (from 1,752,000 in 2000 to 1,578,000 in 2004 – a drop of 10%). Despite a small upturn in national figures for British and European tourists in 2004, the South West has suffered a continuing decline in number from these countries, while numbers of visitors from North America, which dropped by 17.5% in 2001 in the wake of 9/11, have only just returned the 2001 level of 401,000. Northern Irish visitors, who constitute only 2% of inbound tourists to Cork and Kerry, have increased steadily in number over the last five years.

Total numbers of visitors to Cork and Kerry in 2004

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



Visits to Cork & Kerry	Change	2004	2003	2002	2001	2000
	2000-04	000s	000s	000s	000s	000s
Total overseas visitors	-9.9%	1,578	1,515	1,504	1,434	1,752
Visitors from Britain	-8.1%	647	638	675	594	704
Visitors from Europe	-7.8%	425	399	408	364	461
Visitors from North America	-16.6%	401	392	355	392	481
Other overseas	-1.0%	105	86	66	84	106
Domestic Irish tourists	+25.9%	1,428	1,287	1,315	1,234	1,134
Northern Irish tourists	+64.5%	51	47	46	35	31
TOTAL Tourist Visits	+5.2%	3,057	2,849	2,865	2,703	2,907

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

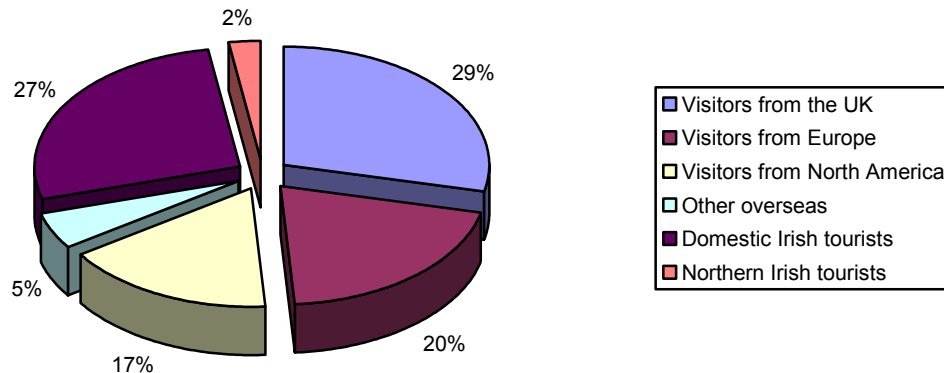
According to Failte Ireland, there were 1,065,000 overseas tourist visits to County Cork in 2004 and 834,000 to County Kerry. The revenue generated from these visits was €428 million in Cork and €224 million in Kerry, or €402 per person in Cork and €268 per person in Kerry. These do not compare favourably with national expenditure by overseas tourists in 2004 of €507 per capita. Clearly, the region is either taking much less per person, or these people are touring and spending over 20% of their money elsewhere in Ireland.

Expenditure in Cork and Kerry

Despite the declining numbers of tourists to the South West, expenditure levels have risen by an average of 29% over the last five years, which would not represent an advance on inflation, however. The growth in expenditure is heavily reliant on domestic and Northern Irish tourists, whose expenditure has risen by 39% and 176% respectively.

Expenditure by visitors to Cork and Kerry in 2004 (€ million)

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

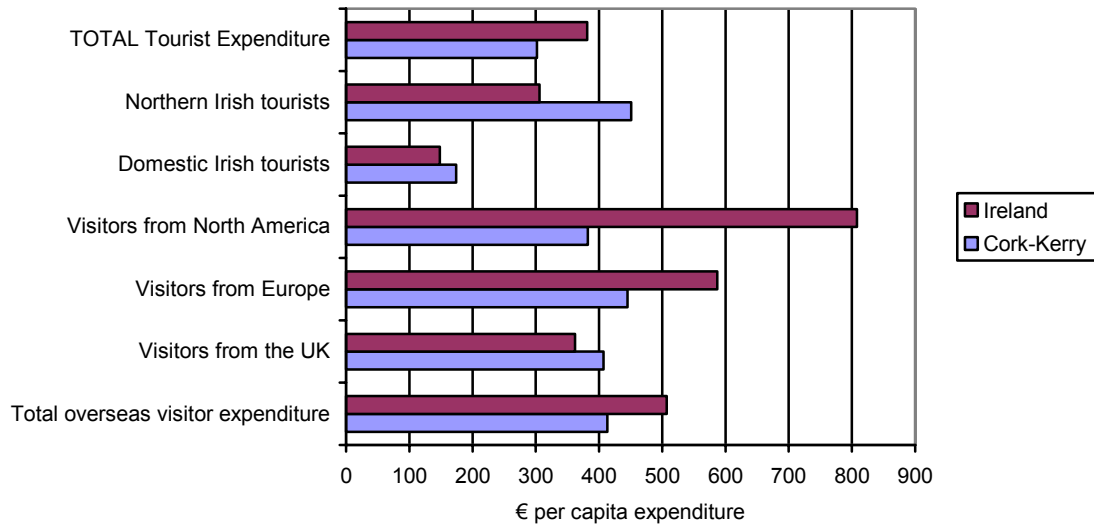


	Rise	2004	2003	2002	2001	2000
	2000-04	€	€	€	€	€
		Million	Million	million	million	million
Total overseas visitor expenditure	+23.4%	652.1	639.1	581.7	519.2	528.3
Visitors from Britain	+22.8%	263.7	281.3	249.3	225.9	214.8
Visitors from Europe	+37.1%	188.7	150.7	170.1	131.9	137.6
Visitors from North America	+2.2%	152.7	163.3	139.8	132.1	149.4
Other overseas	+77.3%	47.0	43.8	22.5	29.3	26.5
Domestic Irish tourists	+38.8%	248.1	232.2	200.9	203.9	178.8
Northern Irish tourists	+176%	22.6	16.7	19.9	12.8	8.2
TOTAL Tourist Expenditure	+29.0%	922.8	888.0	802.5	735.8	715.3

(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 generally lower than it is across Ireland, with the exception of Northern Irish and domestic tourists, who spend more on their visits to Cork and Kerry than elsewhere, and visitors from the UK. The average American visitor spends 50% less in Cork and Kerry than they do on their average Irish trip.



Length of stay

While the numbers of visitors to Ireland have increased slowly in the last five years, and per capita expenditure in real terms has declined, average numbers of nights spent in Ireland by overseas visitors have generally not increased either:

	Average Length of Stay in Nights by Visitors to Ireland				
	2000	2001	2002	2003	2004
Great Britain	5.7	5.6	5.3	5.2	5.0
Other Europe	10.0	11.1	11.2	11.1	10.5
USA and Canada	9.6	9.7	9.6	10.0	9.3
Other Areas	11.6	13.8	15.1	15.9	14.0

(source: Failte Ireland Tourism Facts 2004)

Visitors from Britain, who average 5.0 nights in Ireland, and those from mainland Europe (average 10.5 nights) or North America (9.3 nights) spend very different amounts of money per night of stay in Ireland. Given the growth trends in numbers of visitors to Ireland from Mainland Europe compared to Britain and North America, it is reasonable to forecast further deterioration in expenditure per day this year.

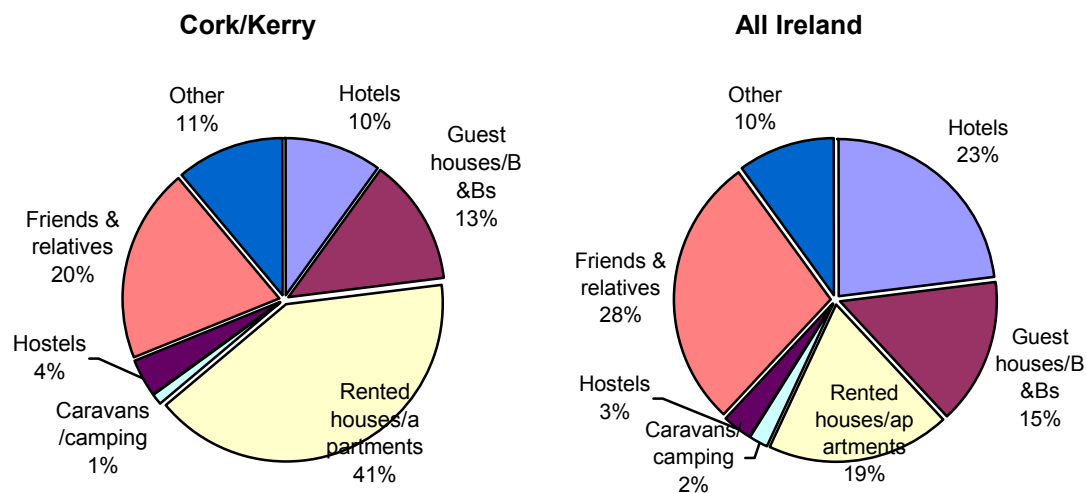
2004	Expenditure per day	Per capita expenditure	Number of nights
		€	
Visitors arriving from Britain	€72.40	362	5.0
Visitors arriving from Europe	€55.90	587	10.5
Visitors arriving from the Americas	€86.88	808	9.3

(source: Failte Ireland Tourism Facts 2004)

Bed Nights

As the following table shows, in 2004, there were 46,604 bed nights booked by overseas visitors to Ireland, of which 28% were among friends and relatives, and almost a quarter in hotels. B&Bs and guesthouses accounted for 15% and rented accommodation for 19%. For Cork and Kerry, there were 9,544 bed nights (20.5% of the Irish total, up from 19% in 2003), and the distribution of those nights was much more skewed towards rental accommodation and away from hotels.

While the overall number of bed nights for overseas visitors to Ireland dropped by 0.5% between 2003 and 2004, the relative proportions for each type of accommodation didn't change much.



	Cork/Kerry		Ireland			
	%		%		%	
	2004	2003	2004	2004	2003	2003
Total bed nights	100	9,544	100	46,604	100	46,846
Hotels	10	954	23	10,663	22	10,278
Guest houses/B&Bs	13	1,240	15	6,979	16	7,470
Rented houses/apartments	41	3,913	19	8,818	19	8,744
Caravans/camping	1	95	2	970	2	1,077
Hostels	4	382	3	1,624	4	1,709
Friends & relatives	20	1,909	28	13,031	28	13,122
Other	11	1,050	10	4,519	9	4,446

(source: Fáilte Ireland Tourism Facts 2004)

Visitors from Britain

British visitors to Ireland account for over 60% of all visitors, and 44% of overseas visitor revenue. The numbers of visitors from Britain have grown by 2.6% since 2000, but by only 1.4% among holiday-makers. In fact, between 2003 and 2004, the number of visits from Britain has remained static at 4,761, while holiday visits have declined by 3% from 1,837 to 1,787. Overall, Britons took 59 million trips outside Britain in 2004, 4.8 million, or 5% of which were to Ireland. In 2004, 37%

of these visits were for a holiday, 37% for visiting friends and relatives and 20% for business. This is very close to the profile for 2000.

Dublin received 924,000 overnight stays by British holidaymakers in 2004, constituting more than 50% of the total, while the South West received 404,000, 23% of the total and the second largest regional total.

Visitors from France

France is the fourth largest supply market for visitors to Ireland, with almost 20% of visitors from mainland Europe. In 2004, there were 309,000 visits from France, which represented a drop of 7% on 2003. Revenue generated amounted to €165 million, which was 9% up on 2003.

French residents took 26.2 million overseas trips in 2004, of which Ireland was only 20th on their list of destinations, with just over half of these visits to Ireland being for holidays, 27% for visiting friends and relatives and 15% for business or conferences. 43% of French visitors spent at least one night in Dublin, while 46% spent at least one night in the South West, primarily in guest houses or B&Bs.

Visitors from the US

Although only 12% of visitors to Ireland in 2004 were from the United States, these contributed 20% of total visitor revenue. Nevertheless, while visitor numbers from the US increased by 7% over 2003, revenues were static. Ireland constituted 3% of the 27.3 million overseas trips made by US residents in 2004, and of these 892,000 visits to Ireland, 69% were for holidays and 20% for visiting friends and relatives.

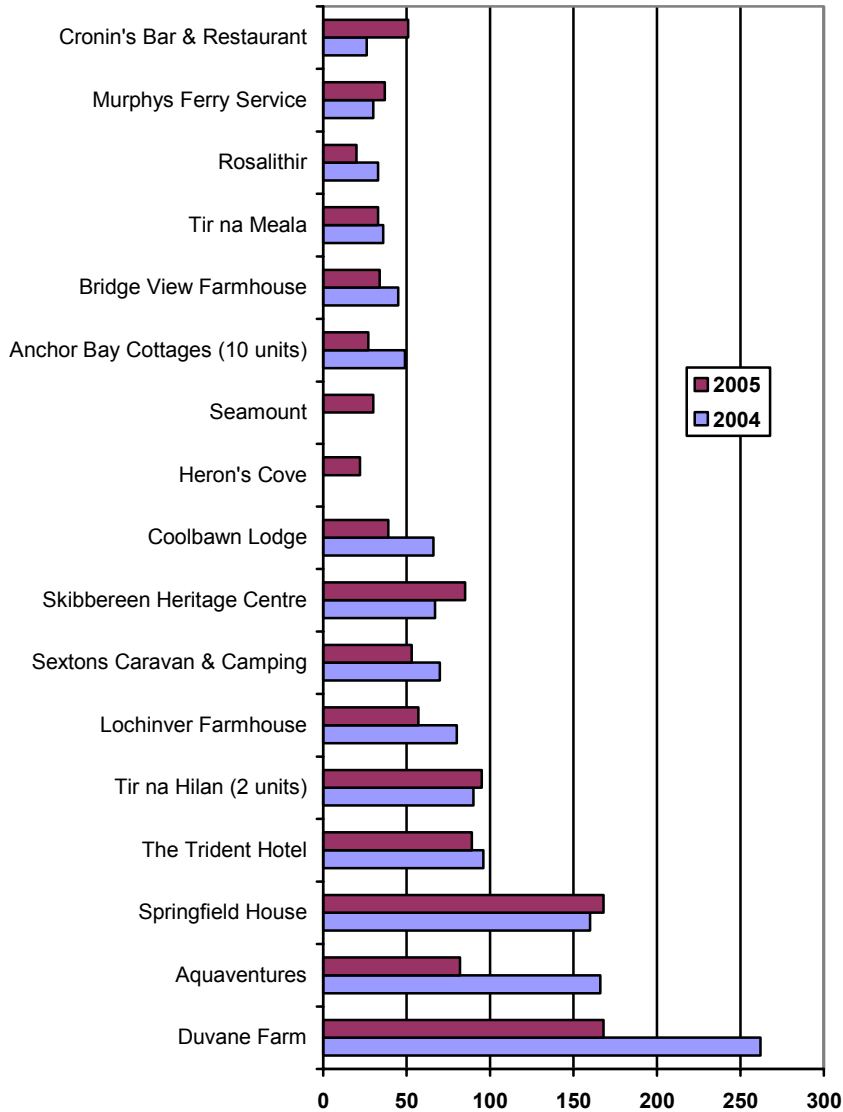
77% of the visits by US visitors included at least one night in Dublin, compared to 57% (348,000) in the South West. Unlike visitors from other countries of origin, US visitors are more likely to stay in hotels in 2004 than they were in 2000.

RESULTS OF THE FUCHSIA BRAND SURVEY

Cards returned

1585 cards were returned in 2005, down 464 from the 2004 level of 2049. 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 2005 was 53, down from 66 in 2004 and 58 in 2003. Of the 1585 returns, 429 came from the top 3 establishments (27%), comparing closely with 29% in 2004.

Over 20 returned:

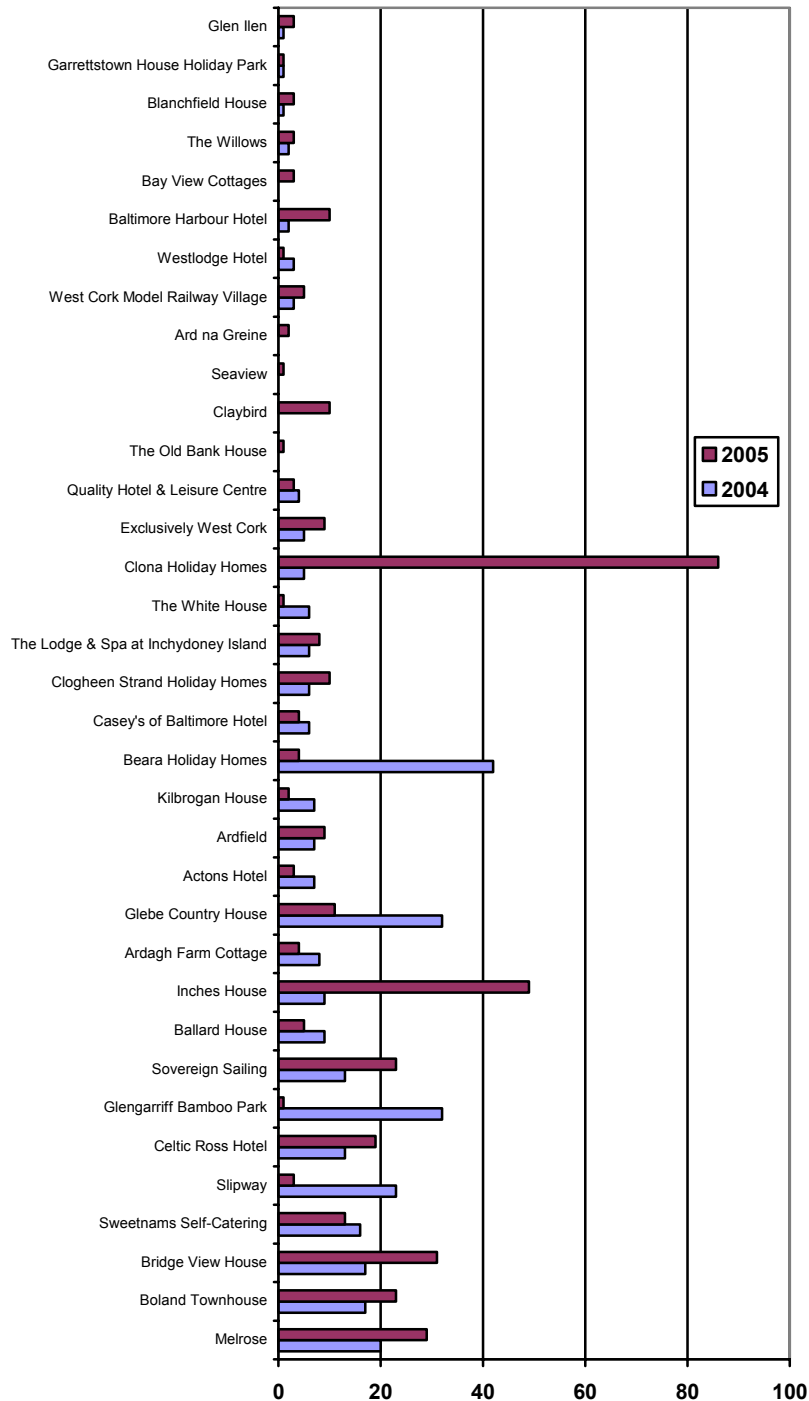


Top three returns:

1. Springfield House (Farmhouse B & B)	168 (160 in 2004)
2. Duvane Farm (Farmhouse B & B)	166 (262 in 2004)
3. Tir na Hilan (2 self catering cottages)	95 (90 in 2004)

The average number of cards returned per establishment in 2005 was 30, up from 29 in 2004, and an increase of 52% over the level in 2001. In 2005, 22 establishments returned more than 20 cards each, only 5 of which increased their number of returns.

Twenty or less returned



21 of the 31 establishments returning 20 or fewer cards in 2005 have improved their rate of returns this year compared to 2004.

The following list of establishments did not return any response cards in 2005:

Kilfinnan Farm
An Garran Coir
Gleann A Phiobaire
Sheep's Head Way
West Cork Sailing Centre
West Cork Golf Academy
Ashdale House
Ciaran Danny Mike's
Rosscarbery House
Dunmore House Hotel
Cluin Mara B&B and Self Catering
Carraig More House
Graceland
Camdan
Ilen Estuary Yachts

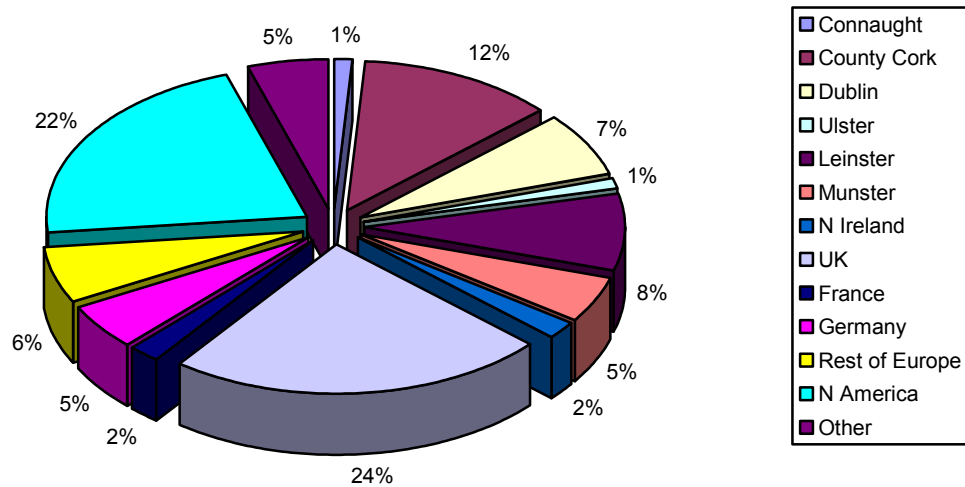
Points to Note:

There is a higher expectation of more returns from Bed & Breakfasts and Hotels, etc. compared to self-catering due to the higher number/shorter stay of visitors. Many hotels have their own comment cards in place, however we would encourage all members to endeavour to increase their returns as this gives a truer and more accurate feedback.

Origin of visitors

In 2005, 24% of all visitors to West Cork were from Britain (down from 25% in 2004), and a further 22% from North America (up from 18% in 2004). Domestic tourism represented the single largest group of visitors, with 34% of the total – 36% of these being local County Cork visitors (who would tend not to stay any length of time in paid accommodation) and one in five from Dublin (down from 25% in 2004).

Origin of visitors to West Cork 2005

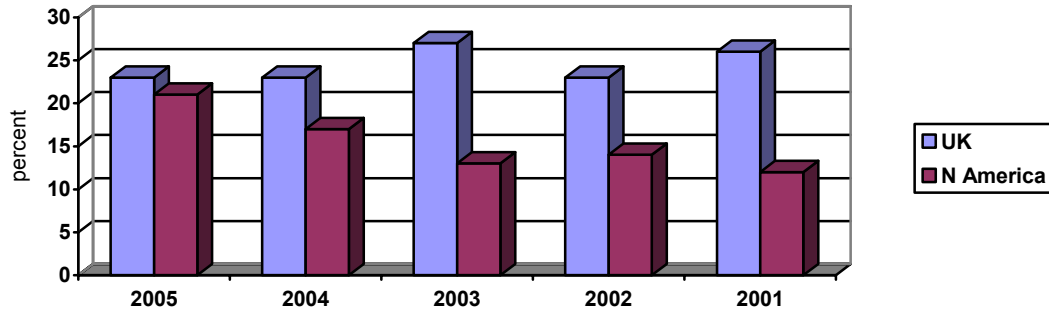


Origin – all visitors	2005	2004
Base	1585	2048
	%	%
Connaught	1	1
County Cork	12	11
Dublin	7	7
Ulster	1	*
Leinster	8	7
Munster	5	4
Total Irish Visitors	34	32
N Ireland	2	1
UK	23	23
France	2	2
Germany	5	5
Rest of Europe	6	12
N America	21	17
Other	5	6

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.

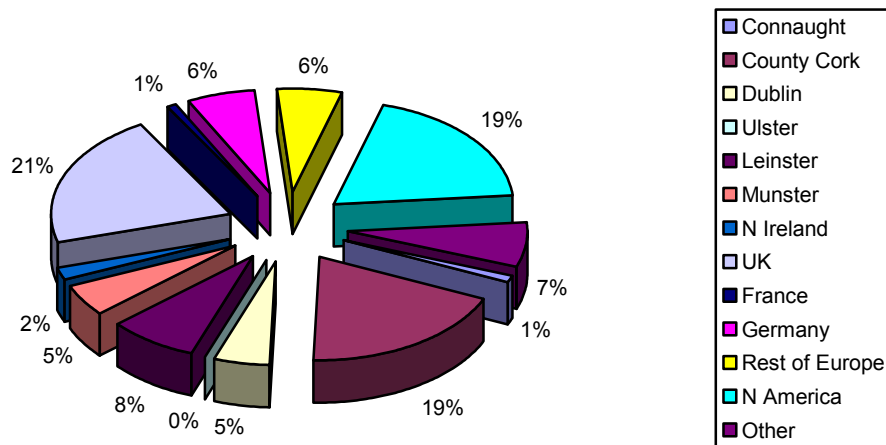
Proportion of all visitors to West Cork from Britain and North America between 2001 and 2005



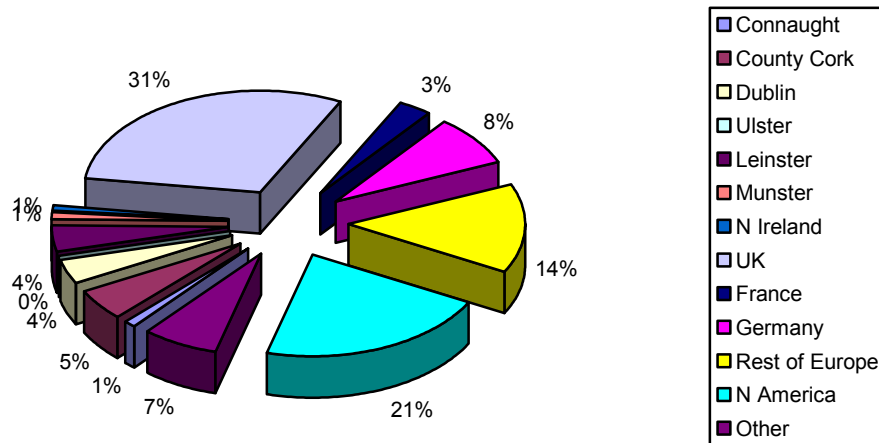
Length of stay in West Cork by origin of visitors

The following chart shows the origin of visitors to West Cork in 2005, 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 two nights in the region (49% of two-night visits are by North Americans), while those from Britain and Europe are tending to stay for at least a week. 19% of visitors staying one night are from County Cork, compared to only 5% who stay more than a week.

Origin of single night visitors to West Cork 2005



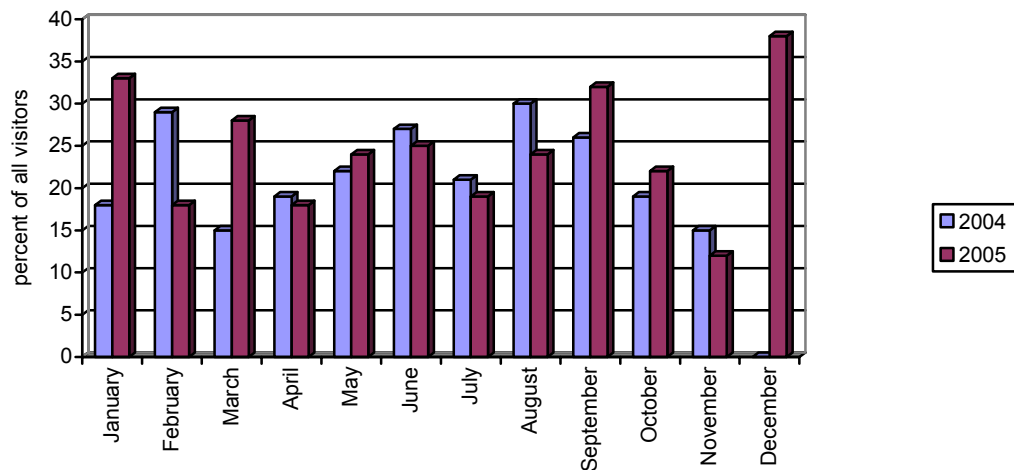
Origin of visitors spending more than a week in West Cork 2005



Time of year visiting West Cork by origin of visitor

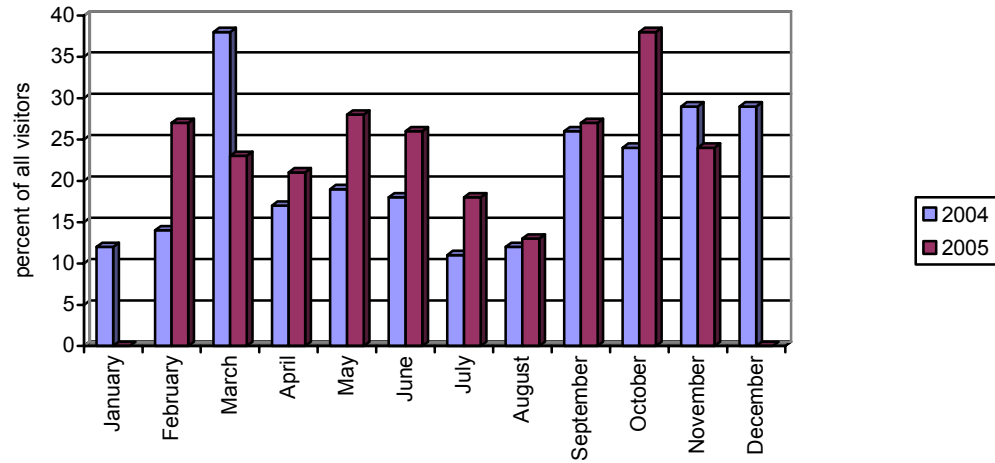
The next two charts show the pattern of visiting through the year in 2004 and 2005 between UK and North American visitors. These are interesting to compare, as visitors from Britain in 2005 tended to come for Christmas, but otherwise are more likely to visit in the high season, while those from North America do not visit West Cork in December or January, but otherwise favour spring and autumn months. There have been some shifts between 2004 and 2005. In 2004, the UK visitors represented a large proportion of all visitors in February, June, August and September, while in 2005, they represented a large proportion of the September, December and January visitors.

British Visitors to West Cork by time of year (% of all visitors) 2004-2005



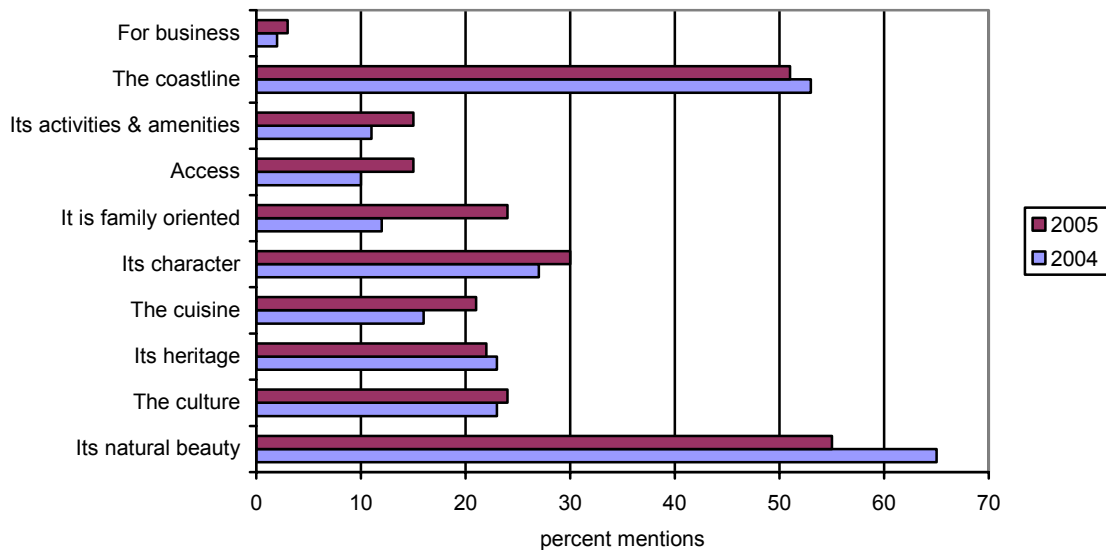
Likewise, in 2004, North Americans accounted for more than a third of all visitors to West Cork in March, but only one in 10 visitors in July, August and January, but in 2005, October was the month in which they were the largest proportion of visitors.

North American Visitors to West Cork by time of year (% of all visitors) 2004-2005



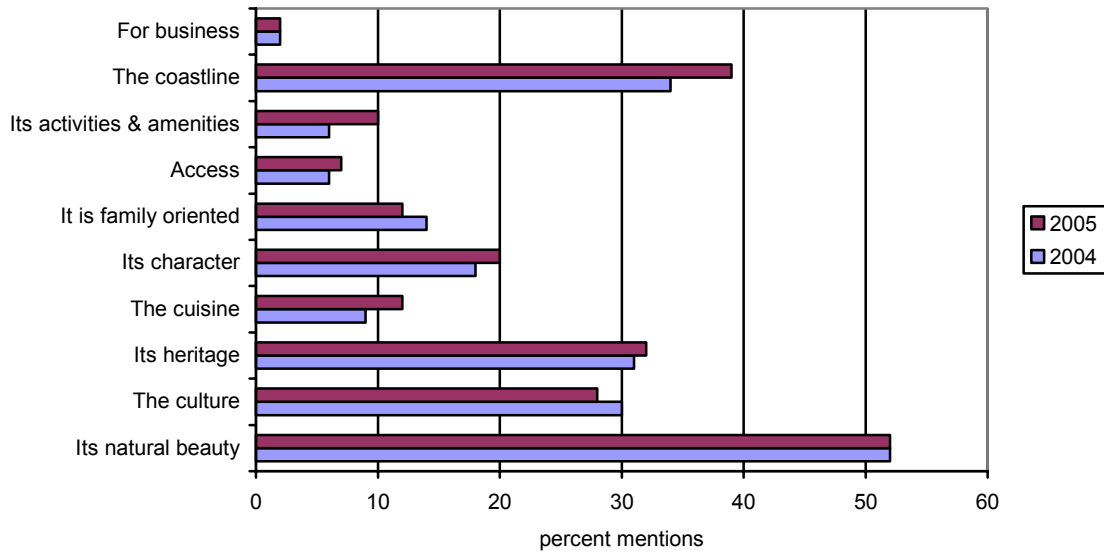
UK visitors to West Cork chose it in 2004 and 2005 because of its character, its natural beauty and the coastline. In 2005, it was also chosen for its family orientation more so than in 2004. Business visits to West Cork in 2005 were mentioned by very few British visitors, as they were in 2004.

Reasons for choosing West Cork among British visitors 2004-2005



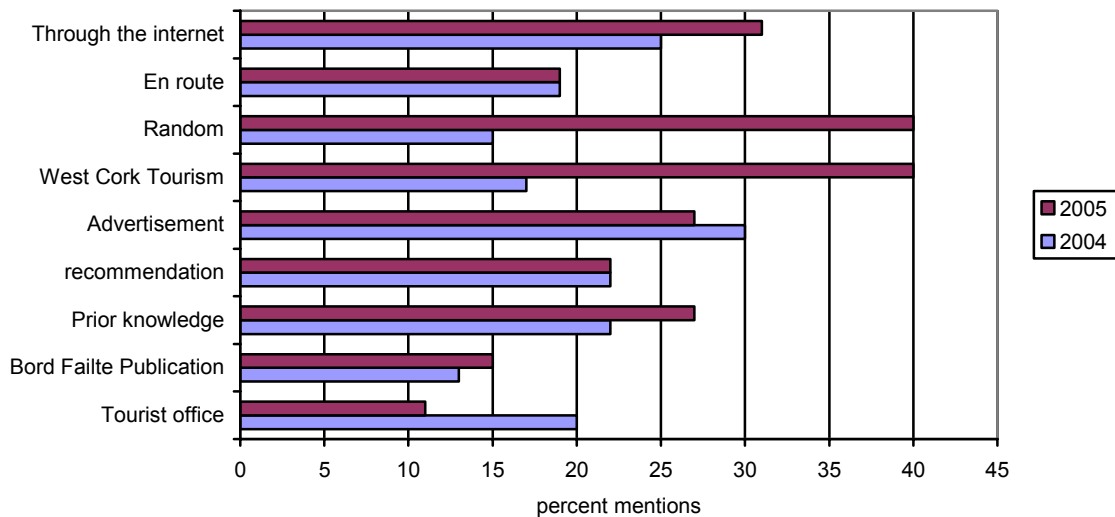
North American visitors were more likely to mention the area’s heritage than visitors from other countries, both in 2004 and 2005, but West Cork’s natural beauty, its culture and heritage, its coastline and character feature strongly this year among Americans.

Reasons for choosing West Cork among North American visitors 2004-2005



It is also interesting to look at how visitors selected the establishments they stayed in or visited. Visitors from Britain tended to make use of the West Cork Tourism services in 2005 much more than they did in 2004, and more closely mirroring their use in 2003. Having said this, the use of the Tourist Offices has declined between 2004 and 2005, and the internet is playing a larger part in the process this year for UK tourists than in 2004

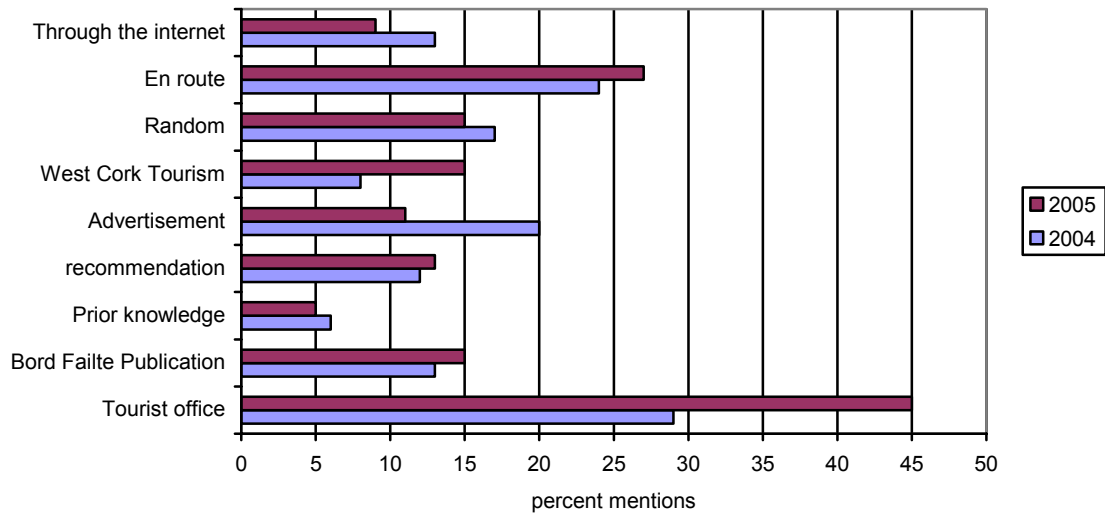
Method of selection of establishment among British tourists 2004-2005



In 2005, North American visitors were much more likely than others to use the tourist office (and more likely than they were to do so in 2004) to book their visit, and also quite likely to visit West Cork en route to somewhere else, or by some

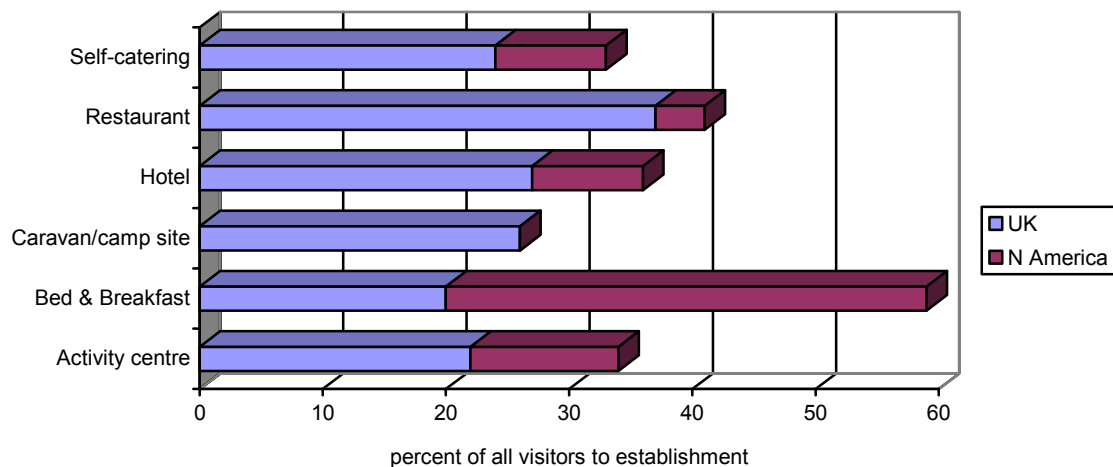
random discovery. Unlike their UK counterparts, they aren't flocking to the Internet for their bookings, an option used by even fewer North Americans than in 2004.

Method of selection of establishment among North American tourists 2004-2005



Bed and Breakfast accommodation was almost twice as popular in 2005 American visitors as UK visitors, who between them made up more than half of all visits to this type of establishment. It is interesting that three times as many British as American visitors stayed in hotels in West Cork in 2005, even though there were barely any more British than North American visitors visiting the area in total.

Type of accommodation/establishment used by British and North American visitors in 2005



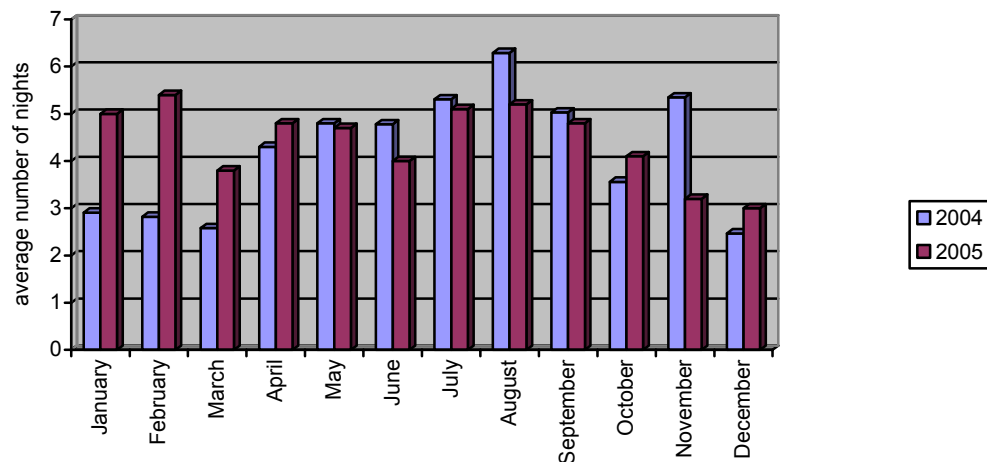
Length of Stay

In 2005, the average length of stay in West Cork for all visitors was 4.9 nights, although 18% 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.

	2005	2004
Base	1585	2049
	%	%
Day trip only	5	2
Stayed one night	18	25
Stayed two nights	19	13
Stayed 3-7 nights	34	36
Stayed 8-14 nights	13	12
Stayed more than 14 nights	4	5
AVERAGE NIGHTS	4.9	5.0

Length of stay by time of year

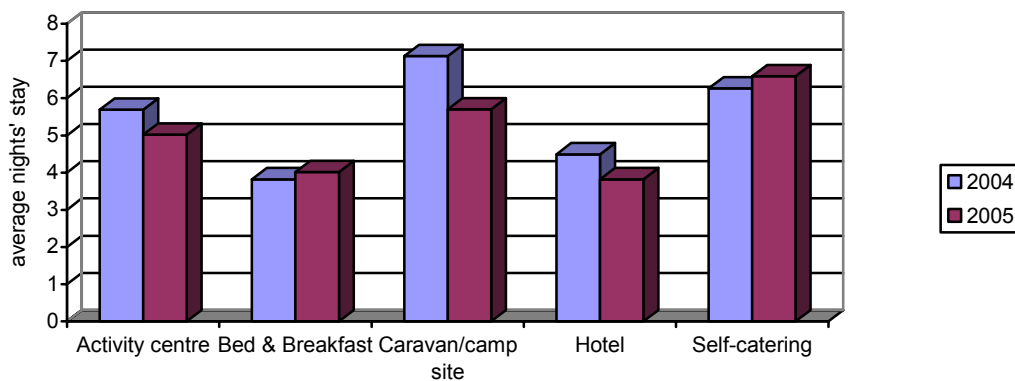
Between 2004, the average number of nights spent in West Cork tended to rise in the summer months, in keeping with the traditional family holiday, and drop off towards the year end. However, in 2005, stay length in January and February was almost at its peak, in line with July/August – a full week's holiday in the winter in West Cork. In the summer months, average lengths of stay dropped marginally between 2004 and 2005, while in the winter they tended to increase. It should be noted that small numbers of cards returned for November and December have generated skewed results in these months.



Average nights	2005	2004
Annual average	4.9	5.04
January	5.0	2.91
February	5.4	2.82
March	3.8	2.58
April	4.8	4.30
May	4.7	4.80
June	4.0	4.78
July	5.1	5.31
August	5.2	6.29
September	4.8	5.03
October	4.1	3.56
November	3.2	5.35
December	3.0	2.47

Length of stay by accommodation type

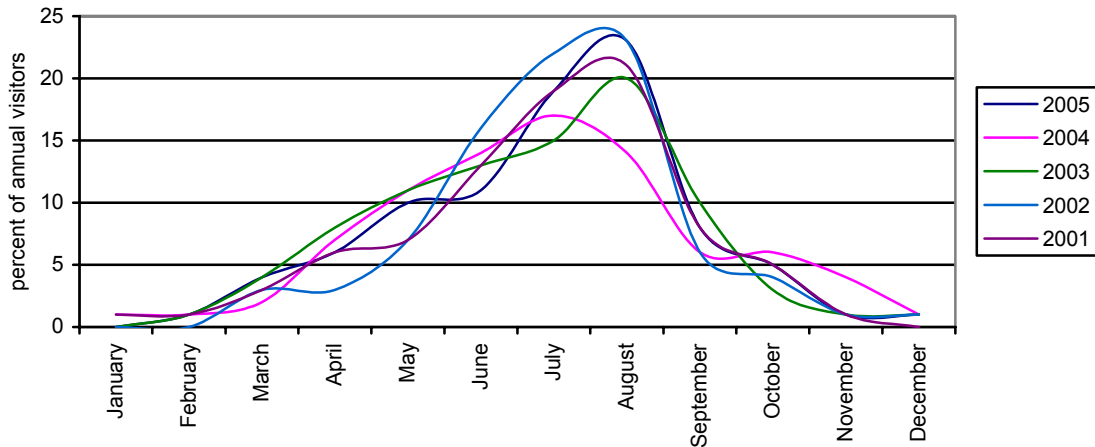
The following chart compares the average number of nights stayed in West Cork, against the type of establishment visited in 2004 and 2005. It is clear that cards completed by visitors to day-time attractions, such as visitor centres, give details about the visitors' stay in West Cork, and not their time at the specific establishment. Those staying in caravans or camping tended to stay about a week in 2004, but this has dropped in 2005 to under 6 days, 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. Length of stay in hotels in West Cork dropped between 2004 and 2005.



	2005	2004
Bed & Breakfast		3.82
Caravan/camp site		7.13
Hotel		4.49
Self-catering		6.26

Time of year visited

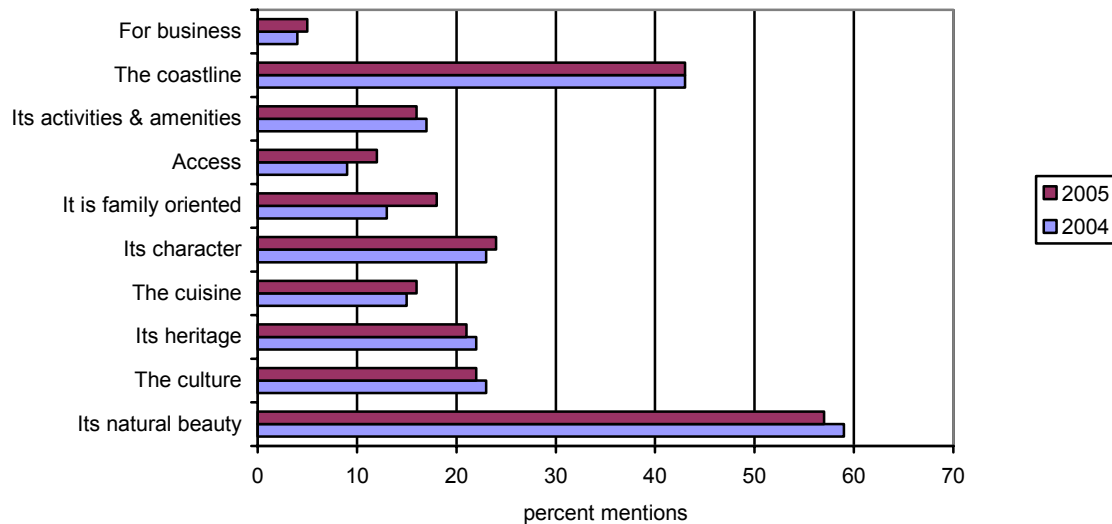
As has already been illustrated, the proportion of visitors rises during the summer high season, and in 2005, this was mainly between April/May and August. Interestingly, the trend between 2000 and 2004 was for the 'season' to move towards spring, perhaps in line with changing weather conditions, while 2005's profile most closely matches that of 2001/2002.



	2005	2004
	1585	2049
	%	%
January	*	1
February	1	1
March	4	2
April	6	7
May	10	11
June	11	14
July	19	17
August	23	14
September	8	6
October	5	6
November	1	4
December	1	1
Not stated	12	16

Reasons for visiting West Cork

Between 2004 and 2005 there was very little change in visitors' views as to why they visit West Cork. The Coastline was second most often mentioned, after the region's natural beauty. All other reasons are mentioned by around one in five respondents to the survey

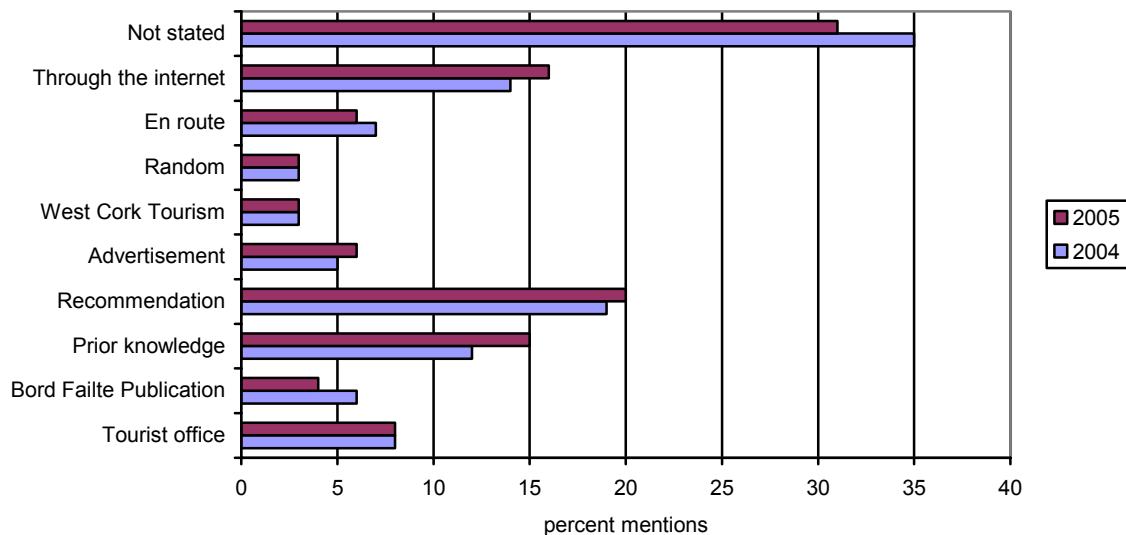


The longer term trends are also remarkably stable. It isn't surprising that the natural charms of West Cork are equally important every year, but some of the other factors are within the control of West Cork's tourist industry. The number of tourists mentioning West Cork's family orientation is declining, 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

	2005	2004
Base	1585	2049
	%	%
Its natural beauty	57	59
The culture	22	23
Its heritage	21	22
The cuisine	16	15
Its character	24	23
It is family oriented	18	13
Access	12	9
Its activities & amenities	16	17
The coastline	43	43
For business	5	4

Method of selecting accommodation/establishment

While almost one in three of those surveyed in 2005 did not answer this question (31%, slightly fewer than in 2004), the main method which 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 be less important as a source of information.



Over the last five years, Bord Failte publications have had a diminishing role in the process of choosing places to stay and visit, as has 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 holidays and international travel.

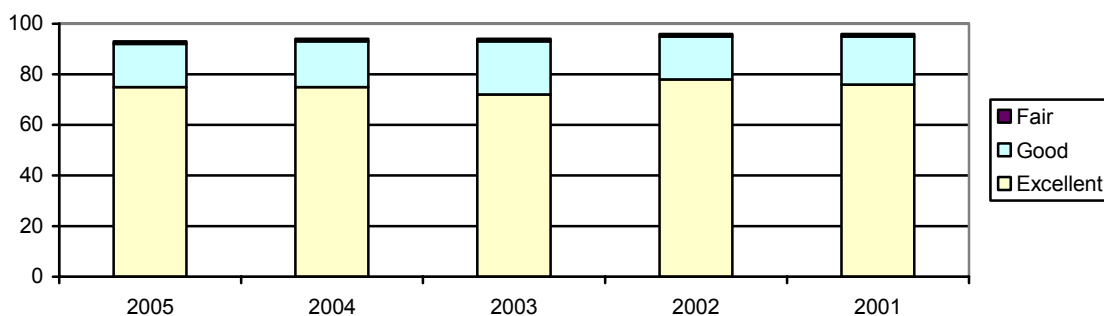
	2005	2004
	1585	2049
	%	%
Tourist office	8	8
Bord Failte Publication	4	6
Prior knowledge	15	12
Recommendation	20	19
Advertisement	6	5
West Cork Tourism	3	3
Random	3	3
En route	6	7
Through the internet	16	14
Not stated	31	35

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

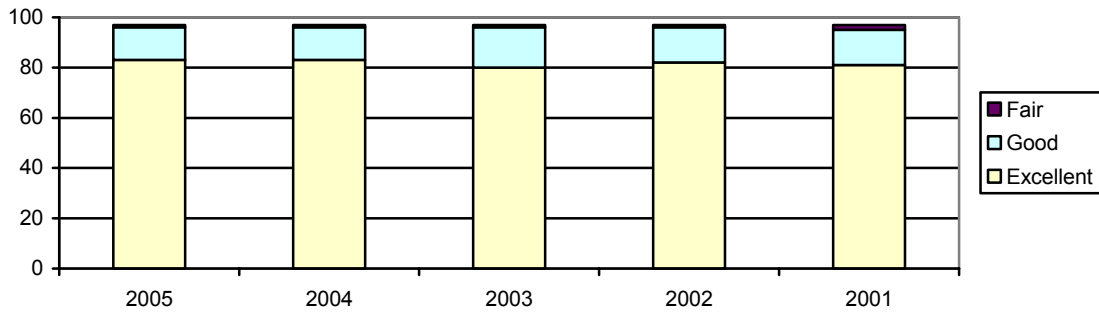
In 2005, much as in 2004, three quarters of visitors give their establishment an excellent rating for product quality and a further 17% a good rating. This has not changed significantly since 2000.



Product quality	2005	2004
	1585	2049
	%	%
Excellent	75	75
Good	17	18
Fair	1	1
Poor	*	*
Not stated	6	6
Mean score	3.78	3.79

Service quality

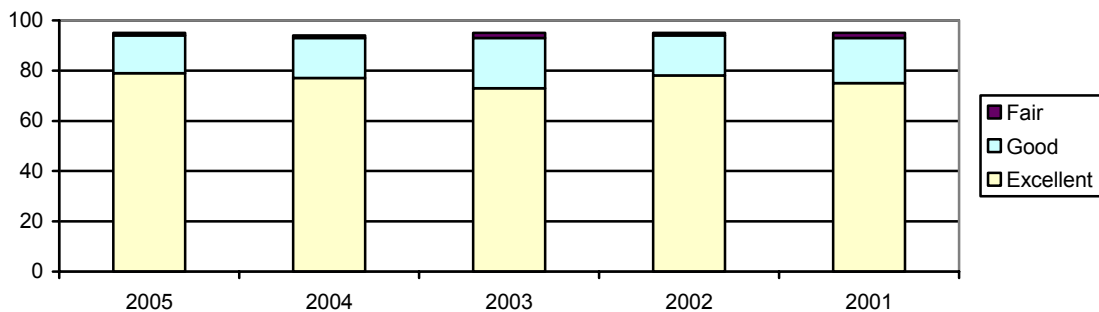
Service quality ratings are higher than those for product quality, with 83% of visitors in 2005 giving service an excellent rating and a further 13% a good rating. This is an improvement on the 2000 figures, and it is three years since anyone gave their establishment a 'poor' rating.



Service quality	2005	2004
	1585	2049
	%	%
Excellent	83	83
Good	13	13
Fair	1	1
Poor	*	*
Not stated	3	4
Mean score	3.85	3.85

Efficiency

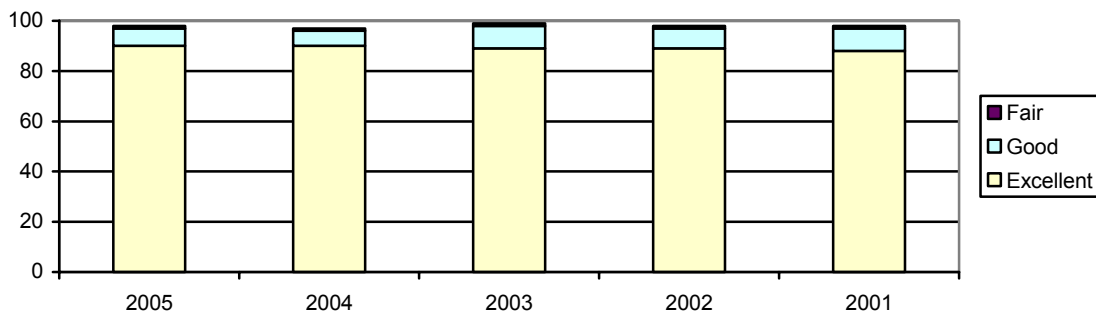
The levels of efficiency have improved in West Cork establishments since 2000, and four in five visitors consider them excellent in 2005.



Efficiency	2005	2004
	1585	2049
	%	%
Excellent	79	77
Good	15	16
Fair	1	1
Poor	*	*
Not stated	5	6
Mean score	3.81	3.81

Friendliness

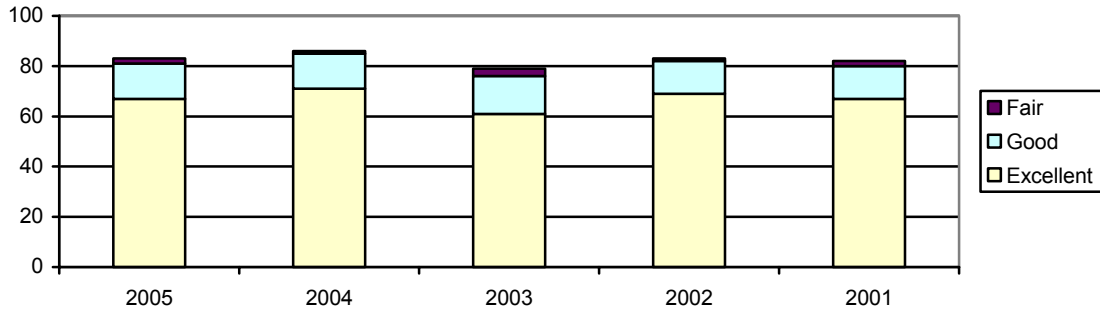
There is almost universal praise for the friendliness of the establishments in West Cork, with 97% of visitors rating it excellent or good in 2005. This has improved slightly in the last five years, with a larger proportion giving the excellent rating in 2005 than 2001.



Friendliness	2005	2004
	1585	2049
	%	%
Excellent	90	90
Good	7	6
Fair	1	1
Poor	*	*
Not stated	2	3
Mean score	3.91	3.92

Food

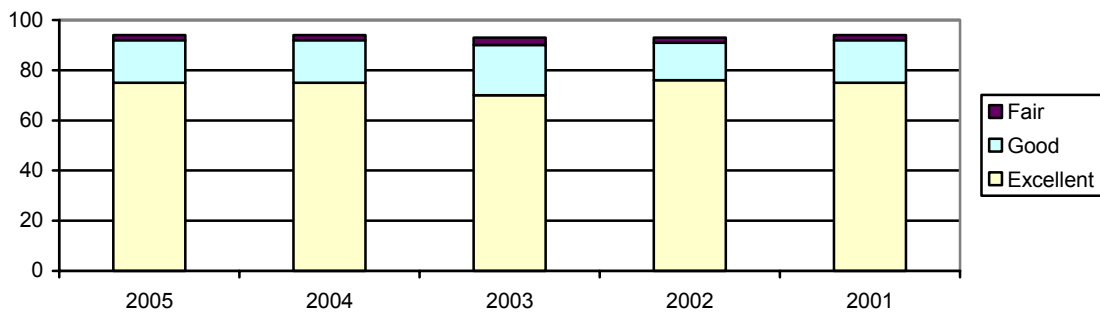
While the overall ratings for food are less positive than for the previous measures, with only two in three visitors rating the food as 'excellent' and 14% as 'good' in 2005, there has been some upward trend in this rating compared to 2003.



Food	2005	2004
	1585	2049
	%	%
Excellent	67	71
Good	14	14
Fair	2	1
Poor	*	*
Not stated	17	14
Mean score	3.79	3.80

Hygiene

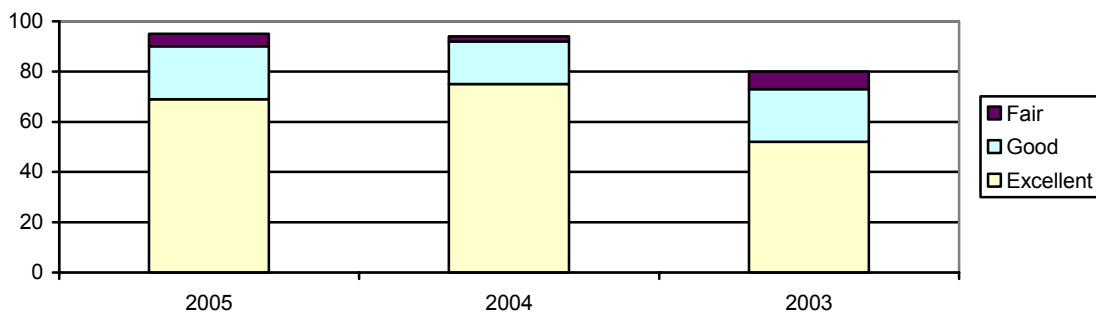
Ratings for the level of hygiene in the establishments surveyed in 2005 are high, with 92% of all visitors rating them as good or excellent. There has been no discernible change in this rating over the last five years.



Hygiene	2005	2004
	1585	2049
	%	%
Excellent	75	75
Good	17	17
Fair	2	2
Poor	*	*
Not stated	6	6
Mean score	3.76	3.77

Value for money

The final measure – value for money – was introduced in 2003, and saw an improvement in 2004, but has slipped again in 2005, with the 'excellent' rating being given by 69% of respondents in 2005, down from 75% in 2004, and with 1% of respondents giving their accommodation a poor rating this year.



	2005	2004
	1585	2049
	%	%
Excellent	69	75
Good	21	17
Fair	5	2
Poor	1	*
Not stated	5	6
Mean score	3.66	3.77

Performance ratings by type of establishment – 2005

The following table shows mean scores for each performance rating by type of establishment booked in 2005 (excluding hostels and visitors centres, which had small bases). It is interesting that the bed and breakfasts achieved the highest ratings for all aspects of performance, closely followed by self-catering accommodation. Hotels did not score highly on product and service quality, efficiency, their food or hygiene, or value for money. In fact, Hotels were less well rated than camping and caravan sites on all measures except food. Of most concern were the low averages for restaurants on value for money, and hygiene. Despite these issues, the score for friendliness of restaurants has improved significantly in 2005.

	Activity centre	B&B/Guest house	Camping /caravan	Hotel	Rest-aurant	Self-cater
Base	302	693	54	138	51	424
Product quality	3.71	3.87	3.64	3.56	3.76	3.83
Service quality	3.79	3.95	3.84	3.68	3.78	3.84
Efficiency	3.80	3.91	3.67	3.61	3.70	3.81
Friendliness	3.88	3.97	3.92	3.80	3.88	3.91
Food	3.67	3.90	3.50	3.56	3.74	3.81
Hygiene	3.68	3.90	3.71	3.66	3.54	3.74
Value for money	3.55	3.80	3.69	3.44	3.41	3.71
Other	3.71	3.96	3.76	3.32	4.00	3.86

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.

