



West Cork LEADER CO-OP.

Tourism Survey 2005-2006

Report on main findings

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

Prepared for Jean Sullivan
West Cork LEADER Co-Op.

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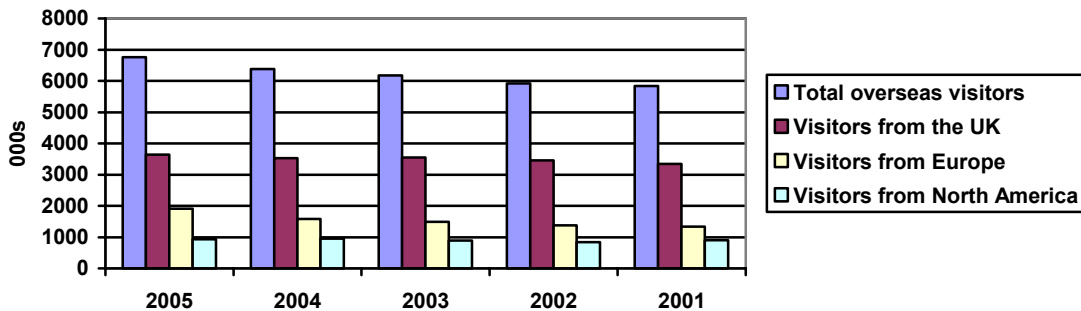
PLEASE NOTE THAT THE STATISTICS IN RELATION TO THE FUCHSIA MEMBERS IS BASED ON THE RESPONSE CARDS SUBMITTED AND THEREFORE THE FIGURES MAY BE SKEWED WHERE THERE IS A LOW RETURN FROM A PARTICULAR CATEGORY.

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 6.8 million overseas tourist visits to Ireland (this might include multiple visits by one tourist) in 2005, which was up by 6% from the 2004 level. As the following table shows, the numbers of visitors from Britain (54% of overseas tourists in 2005) have risen by 8.9% over the five years from 2001 to 2005, the latest full year for which CSO data is available. North American visitor numbers at 937,000 in 2005 still haven't returned to pre 9/11 levels (1.056 million in 2000), and declined by 2% between 2004 and 2005.

Total visitor numbers 2001-2005



(source: Failte Ireland Tourism Facts 2005)

Between January and October 2006, overseas tourism numbers rose by 10% against the same period for 2005, with Mainland European numbers showing the greatest growth for the period.

	change	2006 Jan-Oct	2005 Jan-Oct
	2005-2006	000s	000s
Total overseas visitors	+10%	6,407	5,844
Visitors from Britain	+5%	3,287	3,129
Visitors from Europe	+18%	1,930	1,635
Visitors from North America	+11%	922	831

On a full-year basis, tourists from the rest of Europe (28.1% in 2005) increased by 20.3% from 2004, and tourists from North America, representing 13.9% of all overseas tourists to Ireland in 2005, rose by 3.8% in numbers in the last five years, but declined in terms of their share of all overseas visitors, from 15.4% of all overseas tourists in 2001. Nevertheless, 2005 is an improvement on 2002/03 levels, and an upward trend which seems to have plateaued in 2005.

	change	2005	2004	2003	2002	2001
	2001-05	000s	000s	000s	000s	000s
Total overseas visitors	+15.8%	6,763	6,384	6,178	5,919	5,840
Visitors from Britain	+9.0%	3,640	3,526	3,553	3,452	3,340
Visitors from Europe	+42.4%	1,903	1,582	1,484	1,378	1,336
Visitors from North America	+3.8%	937	956	892	844	903

(source: Failte Ireland Tourism Facts 2005)

The proportion of visitors to Ireland who said that business was their main reason for visiting remained constant at 13% in 2005. This was higher for mainland European visitors (17%) than for North Americans (7%) or British visitors (12%).

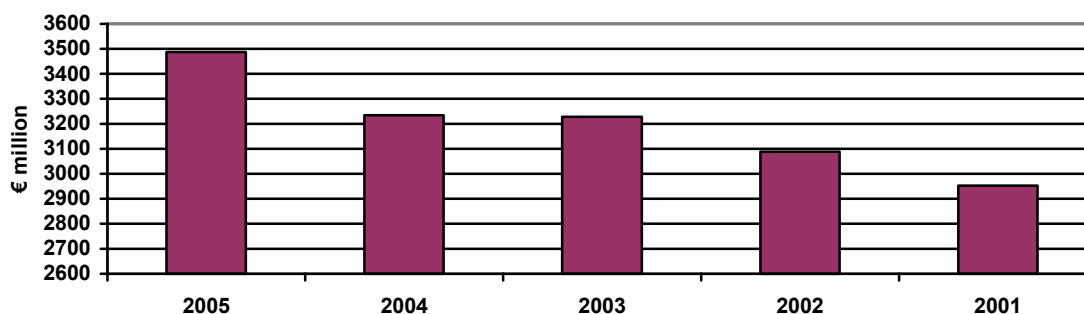
Tourist expenditure in Ireland

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 €3.487 billion expenditure (excluding international fares), visitors entering Ireland from Britain spend 36.5% of total overseas visitor expenditure in 2005, down from 39.4% in 2004, as their total expenditure dropped by 0.15% on the previous year, while spending by Mainland Europeans rose a massive 33.1% in the last year. This small drop in UK spending is against an overall upward trend of 5.3% against the amount they spent in 2001, and a growth in numbers from Britain of 8.98% in the same period – the average expenditure of UK visitors is therefore dropping.

American tourists spent 21.1% of the total in 2005, down 4.4% on their 2004 expenditure, but up 3% since 2001, against a 3.8% increase in numbers in this period: Americans are also spending less than they did in 2001. European tourists spent 35.5% of the total, but their expenditure rose 52% over the period 2001-2004.

Total visitor expenditure 2001-2005:

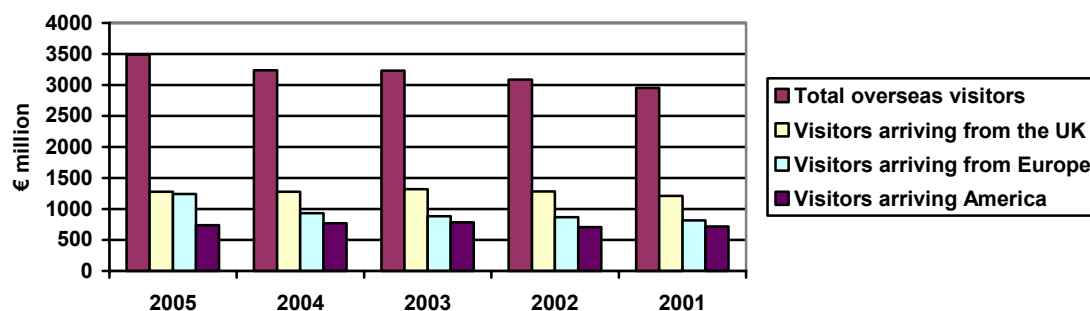
(source: Failte Ireland Tourism Facts 2005)



	Rise	2005	2004	2003	2002	2001
	01-05	€ million	€ million	€ Million	€ million	€ million
Total overseas visitors	18.1%	3,486.9	3234.9	3,227.7	3,087.5	2,951.7
Visitors arriving from Britain	5.3%	1,274.2	1,276.1	1,319.1	1,283.3	1,210.6
Visitors arriving from Europe	52.1%	1,238.6	930.4	885.1	866.6	814.6
Visitors arriving America	2.9%	738.2	772.1	787.2	709.0	717.5

Visitor expenditure by region of origin:

(source: Failte Ireland Tourism Facts 2005)



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 €516 in 2005, up just 2.2% since 2001, despite inflation levels of 3-5% per year throughout this period. The average American tourist spent €788, down 0.9 % on the 2001 level, and down 2.5% between 2004 and 2005 alone. 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/fall	2005	2004	2003	2002	2001
	2001-05	€	€	€	€	€
Total overseas visitors	+2.2%	516	507	522	522	505
Visitors arriving from Britain	-3.6%	350	362	371	372	363
Visitors arriving from Europe	+6.7%	651	587	596	629	610
Visitors arriving from the Americas	-0.9%	788	808	882	851	795

Tourism to Cork and Kerry

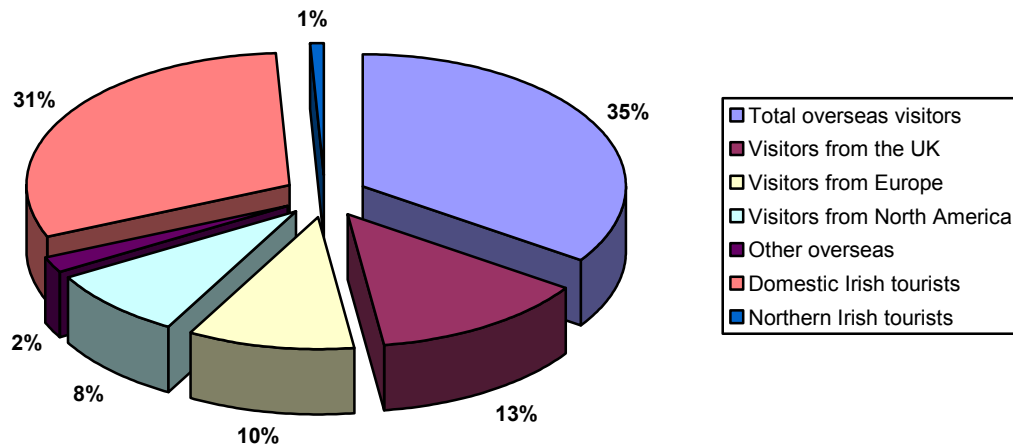
Due to changes in the composition of the South West region within Failte Ireland, statistics for 2005 are not directly comparable to those for 2001-2004, as a result of North Kerry being included. Growth in visitor numbers of 7.5% between 2004 and 2005 would, Failte Ireland estimates, have been 5% using the old region definitions, and expenditure would have been up 13%, as opposed to the 11% under the new region definition. This seeming anomaly – that more people have spent less money is a result of the specific nature of resorts added to the region, including Dingle, having different visitor characteristics from the region as a whole.

Between 2001 and 2005, tourism to the South West rose from 2,807,000 visits to 3,288,000 (up 17%), which is attributed both to growth in domestic tourist numbers (up 23.6%) and international tourist numbers (up from 1,538,000 in 2001 to 1,717,000 in 2005 – a rise of 12%). There was a small upturn in national figures for British tourists in 2005 nationally, while the South West registered a 3.4% growth, and a substantial increase in visitors from Mainland Europe nationally (20.3%) and a larger increase in this region (23%). Nevertheless, taking the changes to the region size into account, these shifts are not significant, and it seems that the South West has behaved in a similar fashion to Ireland as a whole in 2005. 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 421,000. Northern Irish visitors, who constitute only 1.3% of inbound tourists to Cork and Kerry, have declined slightly in numbers since 2004.

It should also be noted that for 2006-7, the figures for Cork-Kerry will undoubtedly be affected by the loss of the Swansea Cork ferry.

Total numbers of visitors to Cork and Kerry in 2005

(source: Failte Ireland Regions South West Tourism Report 2005)



Visits to Cork & Kerry	Change	2005	2004	2003	2002	2001
	2001-05	000s	000s	000s	000s	000s
Total overseas visitors	+8.8%	1,717	1,578	1,515	1,504	1,434
Visitors from Britain	+3.4%	669	647	638	675	594
Visitors from Europe	+23.1	523	425	399	408	364
Visitors from North America	+5.0	421	401	392	355	392
Other overseas	-1.0	104	105	86	66	84
Domestic Irish tourists	+6.8	1,525	1,428	1,287	1,315	1,234
Northern Irish tourists	-9.8%	46	51	47	46	35
TOTAL Tourist Visits	+7.56	3,288	3,057	2,849	2,865	2,703

(source: Failte Ireland Regions South West Tourism Report 2005)

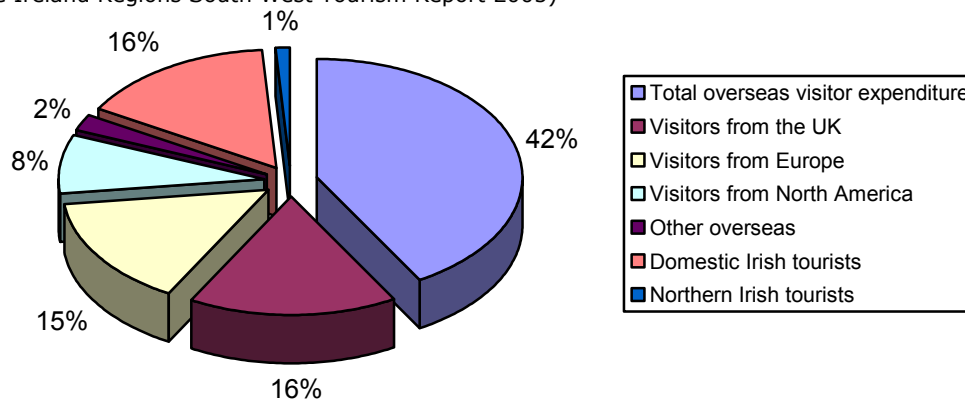
According to Failte Ireland, there were 1,006,000 overseas tourist visits to County Cork in 2005 (down 5.5%) and 821,000 to County Kerry (down 1.6%). The revenue generated from these visits was €502 million in Cork and €229 million in Kerry, or €499 per person in Cork (up 24% on 2004) and €279 per person in Kerry (up 4% on 2004). The Cork figures may well have been affected by the European Capital of culture celebrations in Cork City generating high spending inbound tourism. However, these levels do not compare favourably with national expenditure by overseas tourists in 2004 of €516 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

With a 16% increase in tourists to the South West (estimated on the old region definition), expenditure levels have risen by an average of 42% over the last five years, which represents a significant advance on inflation. The growth in expenditure is dominated by a doubling of income from Mainland European tourists, which now constitutes 26% of total tourist expenditure in the region. While expenditure by British tourists is slightly larger overall, it has increased by less than the level of inflation over the last five years.

Expenditure by visitors to Cork and Kerry in 2005 (€ million)

(source: Failte Ireland Regions South West Tourism Report 2005)

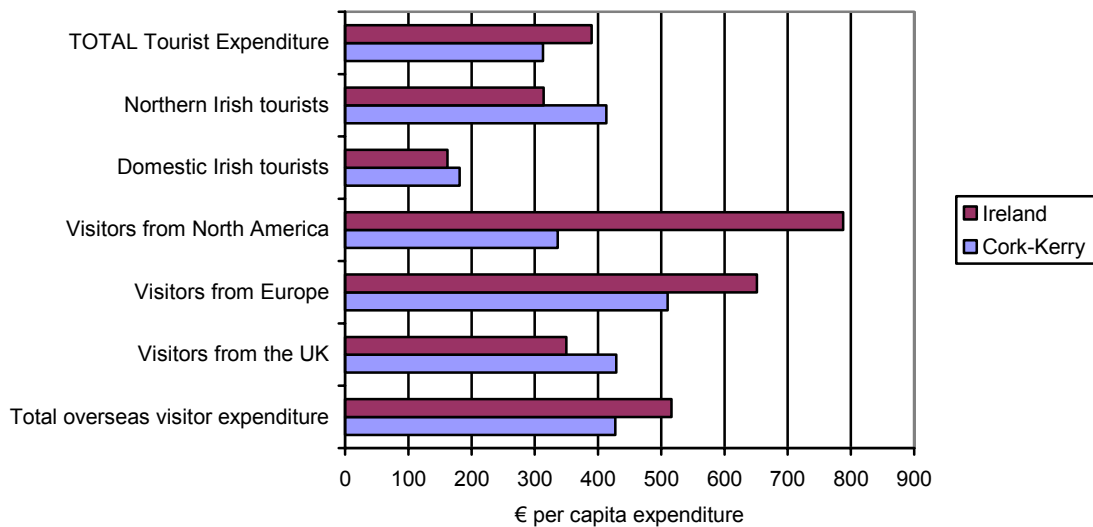


	Rise	2005	2004	2003	2002	2001
	2001-05	€ Million	€ Million	€ Million	€ million	€ million
Total overseas visitor expenditure	+41.2%	733.3	652.1	639.1	581.7	519.2
Visitors from Britain	+27.1%	287.2	263.7	281.3	249.3	225.9
Visitors from Europe	+102.3%	266.8	188.7	150.7	170.1	131.9
Visitors from North America	+7.1%	141.5	152.7	163.3	139.8	132.1
Other overseas	+29.0%	37.8	47.0	43.8	22.5	29.3
Domestic Irish tourists	+35.2%	275.6	248.1	232.2	200.9	203.9
Northern Irish tourists	+48.4%	19.0	22.6	16.7	19.9	12.8
TOTAL Tourist Expenditure	+39.7%	1,027.9	922.8	888.0	802.5	735.8

(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, domestic and UK tourists, who spend more on their visits to Cork and Kerry than elsewhere. The average American visitor spends half as much in Cork and Kerry as 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 increased also, average numbers of nights spent in Ireland by overseas visitors have generally not increased:

	Average Length of Stay in Nights by Visitors to Ireland				
	2001	2002	2003	2004	2005
Great Britain	5.6	5.3	5.2	5.0	4.8
Other Europe	11.1	11.2	11.1	10.5	10.8
USA and Canada	9.7	9.6	10.0	9.3	9.4
Other Areas	13.8	15.1	15.9	14.0	13.3

(source: Failte Ireland Tourism Facts 2005)

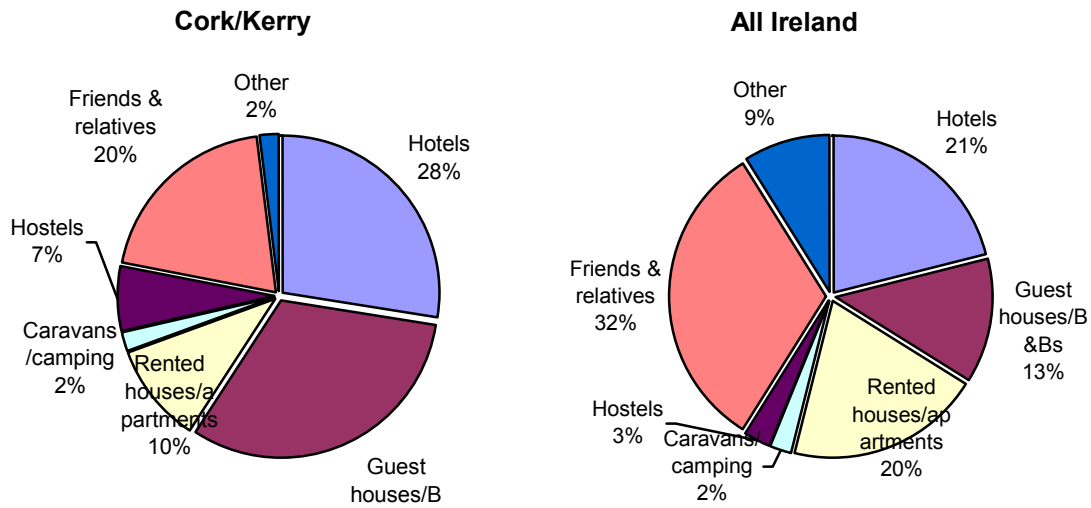
Visitors from Britain, who average 4.8 nights in Ireland, and those from mainland Europe (average 10.8 nights) or North America (9.4 nights) spend very different amounts of money per night of stay in Ireland. Given the growth trends in numbers of visitors to Ireland from Mainland Europe compared to Britain and North America, it is reasonable to forecast a growth in expenditure per day this year.

2005	Expenditure per day	Per capita expenditure	Number of nights
		€	
Visitors arriving from Britain	€72.92	350	4.8
Visitors arriving from Europe	€60.28	651	10.8
Visitors arriving from the Americas	€83.83	788	9.4

(source: Failte Ireland Tourism Facts 2005)

Bed Nights

As the following table shows, in 2005, there were 50.7 million bed nights booked by overseas visitors to Ireland, of which 32% were among friends and relatives, and 21% in hotels. B&Bs and guesthouses accounted for 13% and rented accommodation for 20%. For Cork and Kerry, the distribution of those nights was more oriented to hotels in 2005, which represents a substantial shift from the situation in 2004, when the profile was skewed towards rental accommodation and away from hotels.



	Cork/Kerry		Bed-nights in Ireland			
	%	%	%	000s	%	000s
	2005	2004	2005	2005	2004	2004
Total bed nights	100	100	100	50,700	100	46,604
Hotels	29	10	21	10,647	23	10,663
Guest houses/B&Bs	33	13	13	6,591	15	6,979
Rented houses/apartments	11	41	20	10,140	19	8,818
Caravans/camping	2	1	2	1,014	2	970
Hostels	7	4	3	1,521	3	1,624
Friends & relatives	21	20	32	16,224	28	13,031
Other	2	11	9	4,563	10	4,519

(source: Failte Ireland Tourism Facts 2005)

Visitors from Britain

British visitors to Ireland account for 54% of all overseas visitors, and 36.5% of overseas visitor revenue. The numbers of visitors from Britain have grown by 9.0% since 2001, but by only 1.1% among holiday-makers. In fact, between 2004 and 2005, the number of visits from Britain rose by 3.2%, while holiday visits declined by 3.3% from 1,787,000 to 1,662,000. Overall, Britons took 3.64 million visits to Ireland. In 2005, 48% of these visits were for a holiday, 37% for visiting friends and relatives and 11% for business.

Dublin received 33% of overnight stays by British holidaymakers in 2005 constituting 33% of the total, and 59% of the British visitors visited Dublin, while the South West received 23% of the British visitors, constituting 22% of bed-nights and the second largest regional total.

Visitors from France

France is the fourth largest supply market for visitors to Ireland, with 16% of visitors from mainland Europe. In 2005, there were 310,000 visits from France, which represented a 4% increase on 2004. Revenue generated amounted to €176 million, which was 11.4% up on 2004.

47% of French visits to Ireland in 2005 were for holidays, 27% for visiting friends and relatives and 15% for business or conferences. 48% of French visitors spent at least one night in Dublin, while 45% spent at least one night in the South West, primarily in guest houses or B&Bs.

Visitors from the US

Although only 13% of visitors to Ireland in 2005 were from the United States, these contributed 21% of total overseas visitor revenue. Nevertheless, visitor numbers from the US dropped by 2% against 2004, and revenues declined by 4.4%. US residents made 854,000 visits to Ireland in 2005, and of these, 66% were for holidays and 22% for visiting friends and relatives.

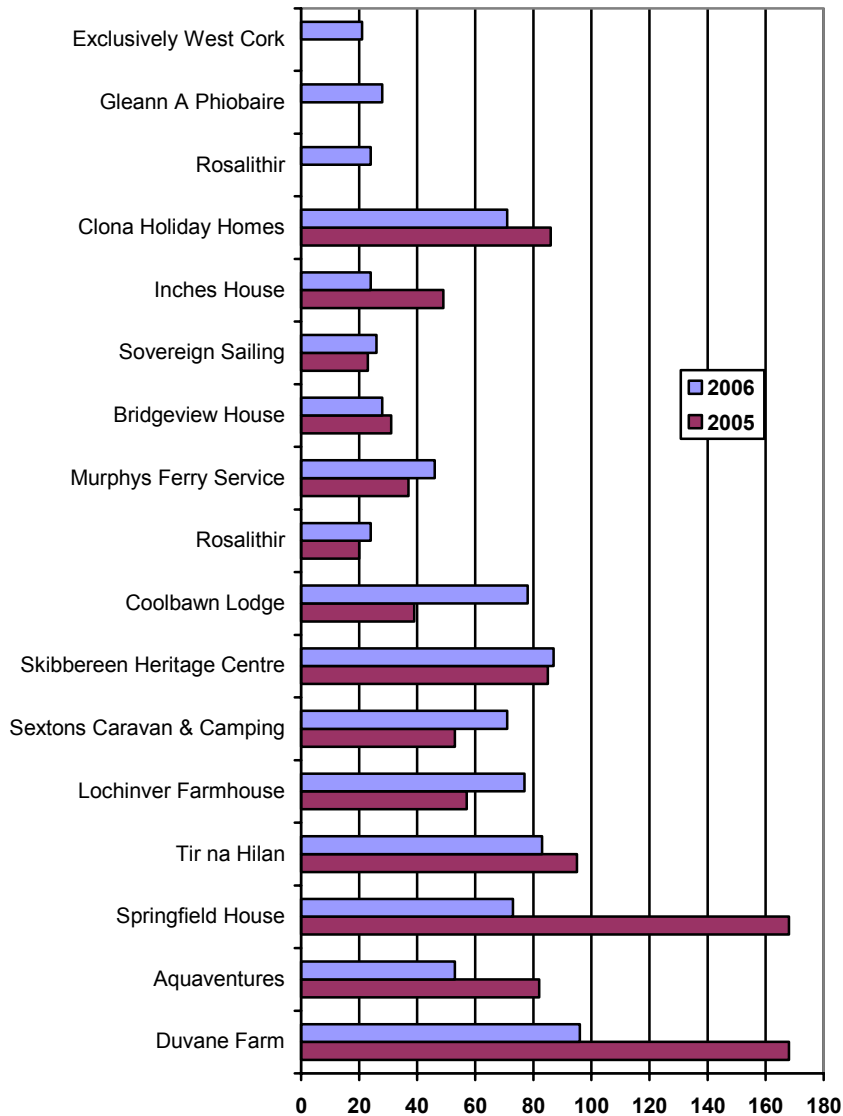
72% of the visits by US visitors included at least one night in Dublin, compared to 55% (470,000) in the South West. US visitors are more likely to stay in hotels (62%) than in Guest Houses and B&Bs (44%) or elsewhere.

RESULTS OF THE WEST CORK FUCHSIA MEMBERS SURVEY

Cards returned

1242 cards were returned in 2006, down 343 from the 2005 level of 1585. This is against a background of an increase in tourist numbers to the South West in the same period. The number of establishments returning cards in 2006 was 51, down from 53 in 2005. Of the 1151 cards identified by establishment, 266 came from the top 3 establishments (23%), comparing closely with 27% in 2005.

Over 20 returned:

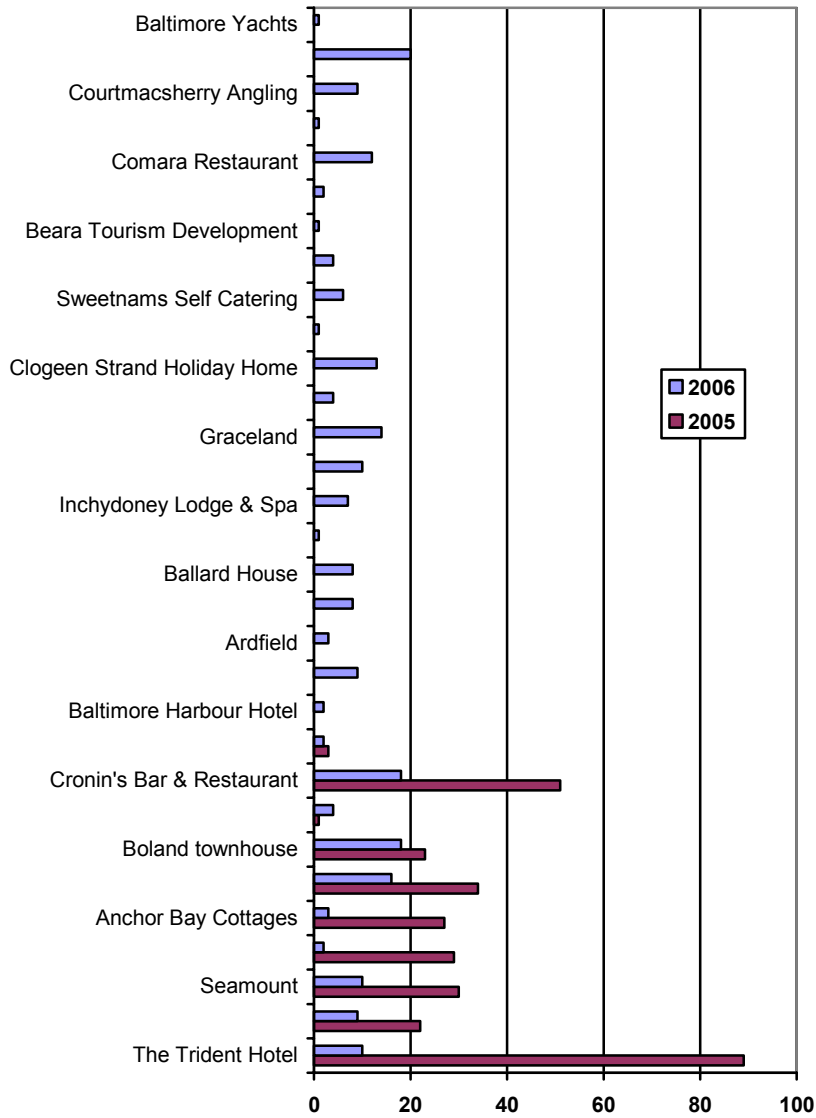


Top three returns:

1. Duvane Farm 96 (166 in 2005)
2. Skibbereen Heritage Centre 87 (85 in 2005)
3. Tir na Hilan 83 (95 in 2005)

The average number of cards returned per establishment in 2006 was 23, down from 30 in 2005. In 2005, 17 establishments returned more than 20 cards each, 9 of which increased their number of returns. 16 establishments returned 20 or fewer cards in 2006.

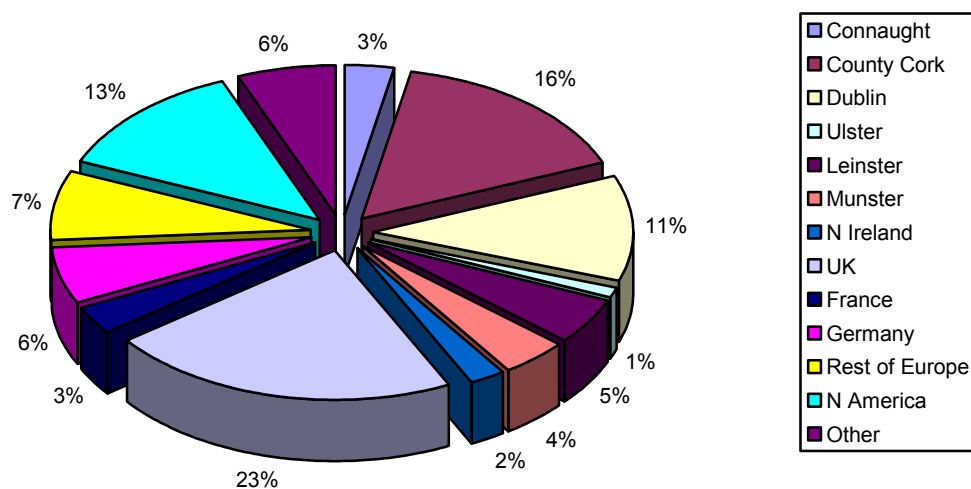
Twenty or less returned



Origin of visitors

In 2006, 21% of all visitors to West Cork were from Britain (down from 24% in 2005), and a further 12% from North America (down from 22% in 2005). Domestic tourism represented the single largest group of visitors, with 39% of the total – 38% of these being local County Cork visitors (who would tend not to stay any length of time in paid accommodation) and one in 28% from Dublin (up from 20% in 2005).

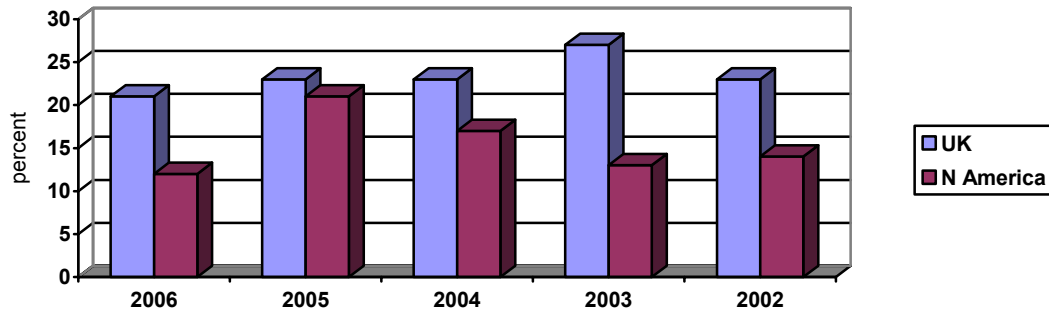
Origin of visitors to West Cork 2006



Origin – all visitors	2005	2006
Base	1585	1241
	%	%
Connaught	1	3
County Cork	12	15
Dublin	7	11
Ulster	1	1
Leinster	8	5
Munster	5	4
Total Irish Visitors	34	39
N Ireland	2	2
UK	23	21
France	2	3
Germany	5	6
Rest of Europe	6	7
N America	21	12
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 rising above one third only in the last year. The proportion of visitors to West Cork from North America rose to 2005 but has fallen dramatically in 2006, and the proportion from Britain continues to fall.

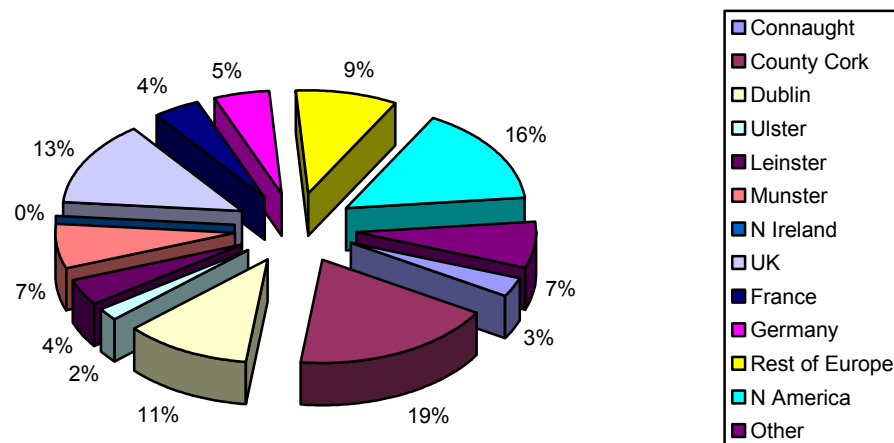
Proportion of all visitors to West Cork from Britain and North America between 2001 and 2005



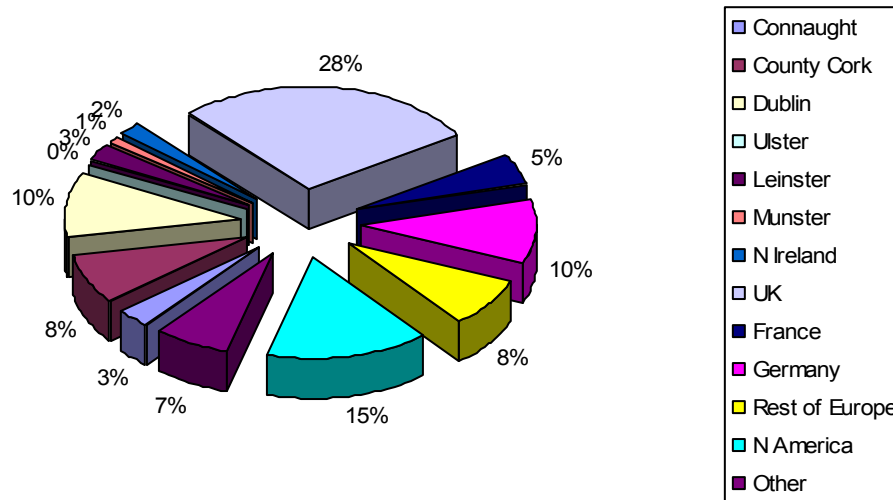
Length of stay in West Cork by origin of visitors

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. 18% of visitors staying one night are from County Cork, compared to only 8% of those who stay more than a week. 13% of one-night visitors are from the UK and a further 15% are from North America, while among those staying more than a week in the area, UK visitors constitute 28% and North Americans only 15%.

Origin of single night visitors to West Cork 2006



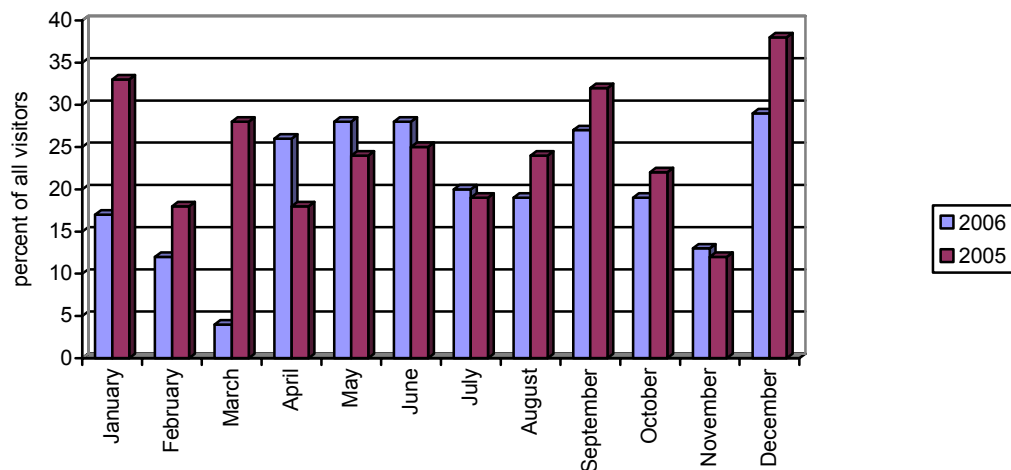
Origin of visitors spending more than a week in West Cork 2006



Time of year visiting West Cork by origin of visitor

The next two charts show the pattern of visiting through the year in 2005 and 2006 between UK and North American visitors. These are interesting to compare, as visitors from Britain in 2006 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 2005 and 2006. In 2005, the UK visitors represented a large proportion of all visitors in December, January, March, and September, while in 2006, they represented a large proportion of April, May, June, September and December.

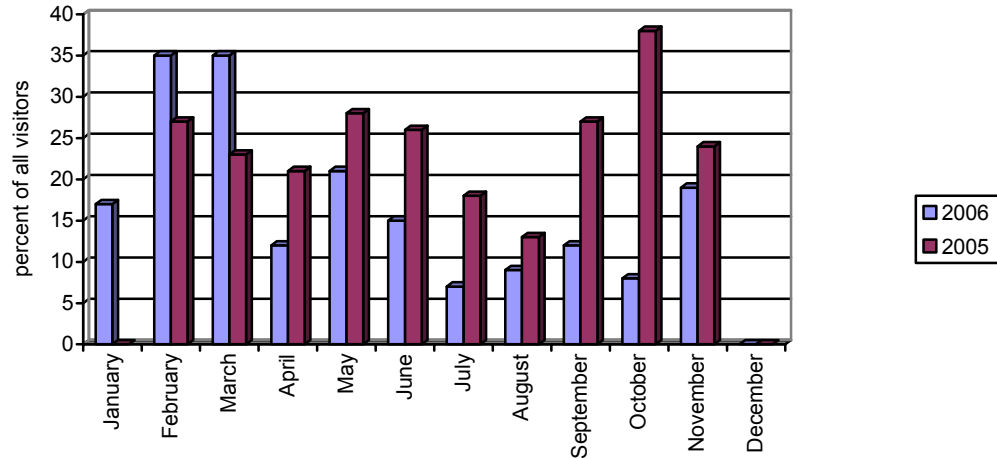
British Visitors to West Cork by time of year (% of all visitors) 2005-2006



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

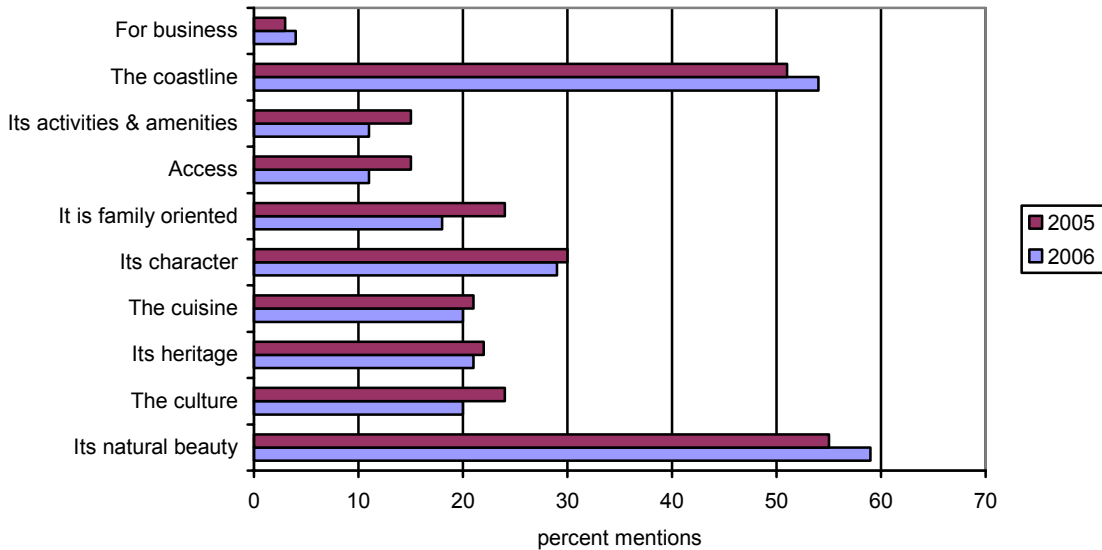
proportion of visitors. December is a month without North American visitors to West Cork.

North American Visitors to West Cork by time of year (% of all visitors) 2005-2006



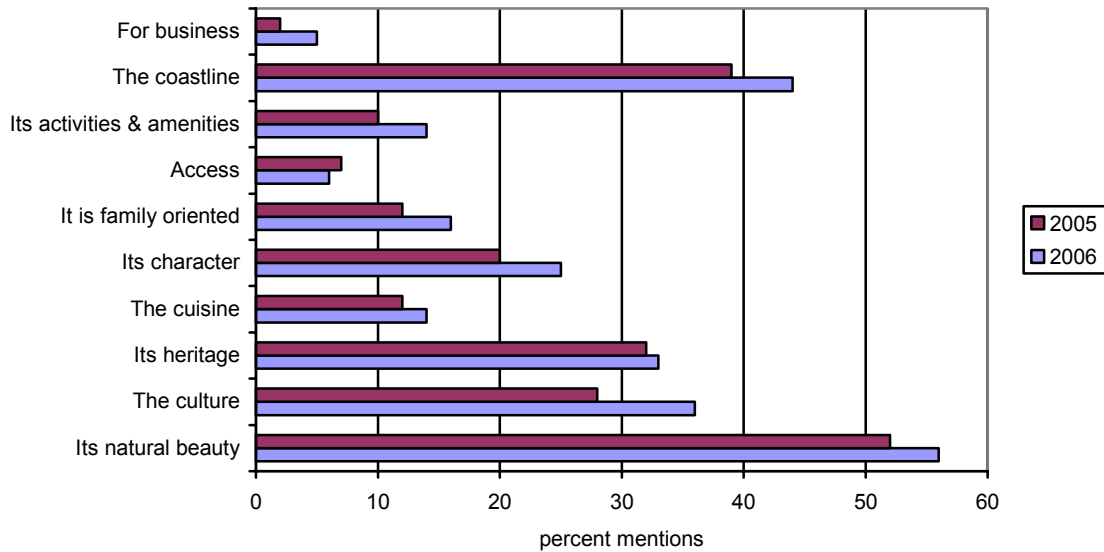
UK visitors to West Cork chose it in 2004 and 2005 because of its character, its natural beauty and the coastline. Business visits to West Cork in 2005 were mentioned by very few British visitors, as they were in 2005.

Reasons for choosing West Cork among British visitors 2005-2006



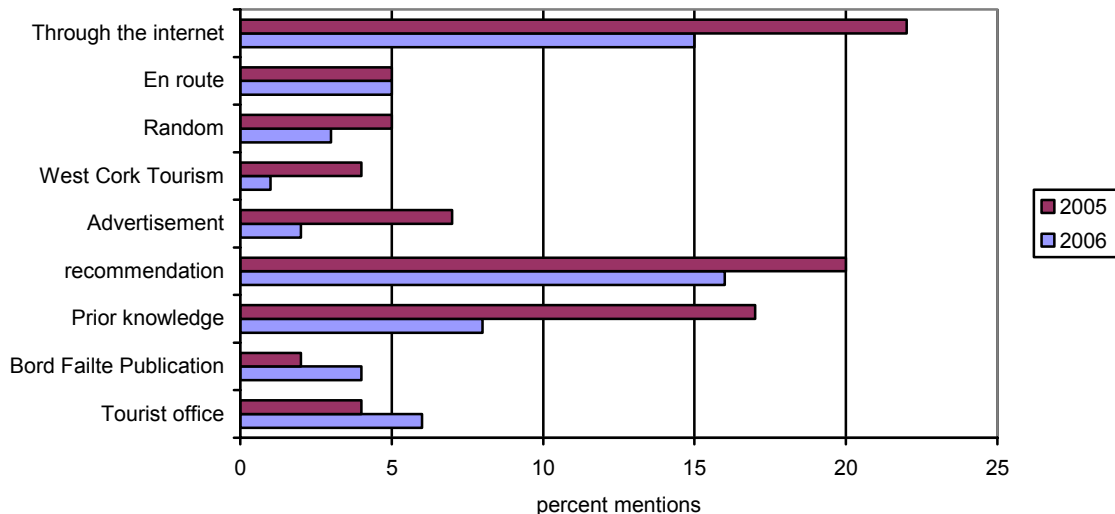
North American visitors were more likely to mention the area's heritage than visitors from other countries, both in 2005 and 2006, but West Cork's natural beauty, its culture and heritage, its coastline and character feature strongly this year among Americans.

Reasons for choosing West Cork among North American visitors 2005-2006



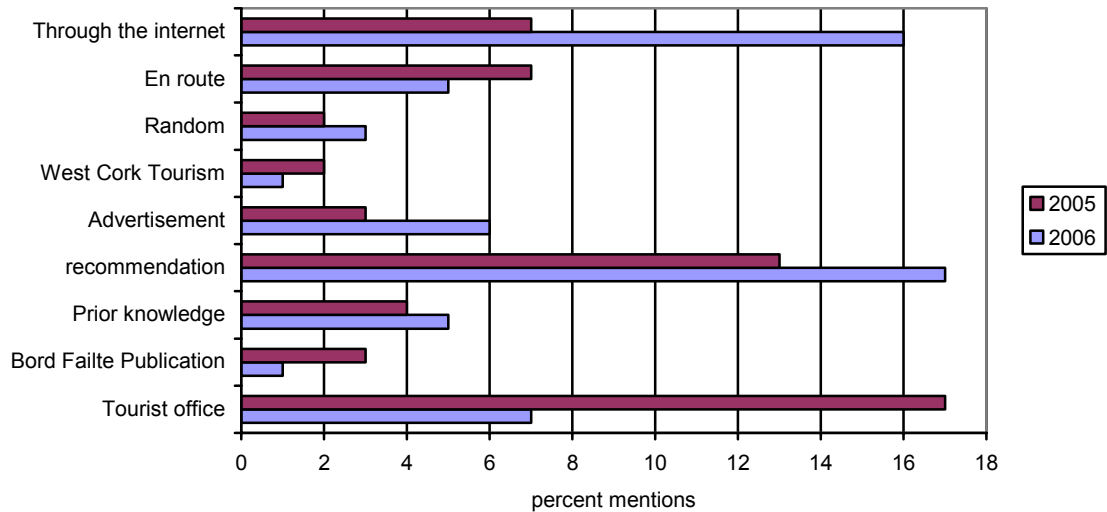
It is also interesting to look at how visitors selected the establishments they stayed in or visited. Visitors from Britain tended to make use of the Internet and advertisements more in 2005 than they did in 2006, and also their prior knowledge of the area, while the use of the Tourist Offices has increased slightly between 2005 and 2006.

Method of selection of establishment among British tourists 2005-2006



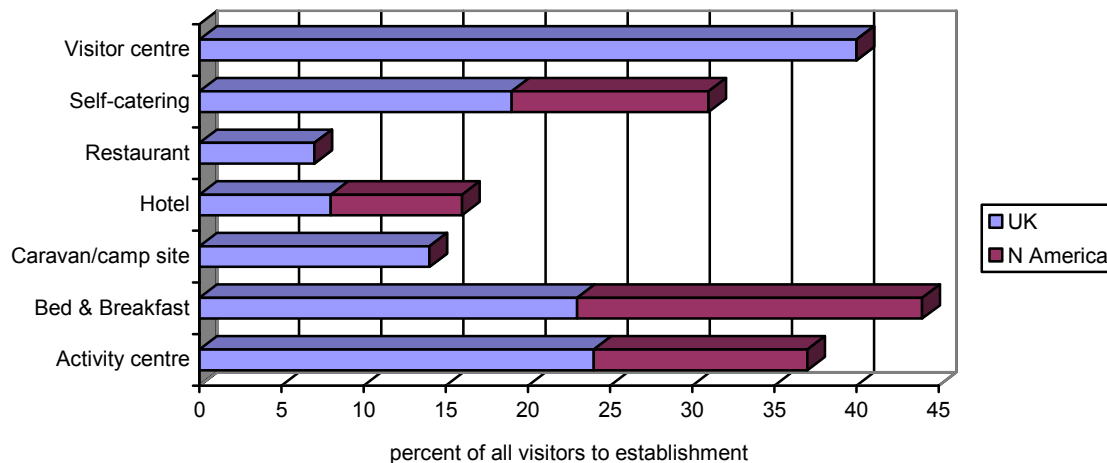
In 2006, North American visitors were much more likely to use the internet to book their visit, or to rely on recommendations than they were in 2005, but much likely to use the tourist offices. Unlike their UK counterparts, they aren't flocking to the Internet for their bookings (with only 16% as opposed to 22% among UK visitors), even though this has more than doubled against the level for 2005.

Method of selection of establishment among North American tourists 2005-2006



Bed and Breakfast accommodation was almost twice as popular in 2005 American visitors as UK visitors, but in 2006, the levels of use were almost equal, and between them made up more than half of all visits to this type of establishment. Camping was exclusively a British and Irish activity in 2006.

Type of accommodation/establishment used by British and North American visitors in 2006



Length of Stay

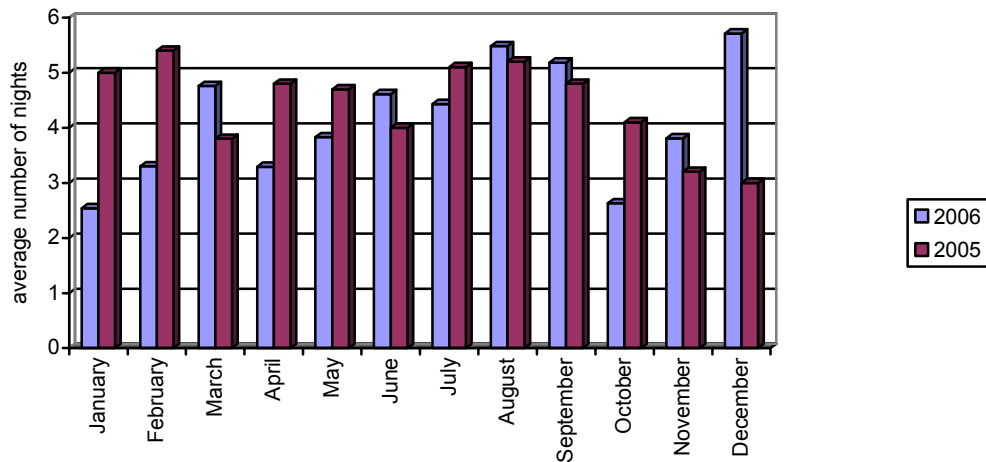
In 2006, the average length of stay in West Cork for all visitors was 4.6 nights, down from 4.9 in 2005 although 29% stayed only one night or didn't stay at all and 15%

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	2006
Base	1585	1242
	%	%
Day trip only	5	12
Stayed one night	18	17
Stayed two nights	19	13
Stayed 3-7 nights	34	34
Stayed 8-14 nights	13	12
Stayed more than 14 nights	4	3
AVERAGE NIGHTS	4.9	4.6

Length of stay by time of year

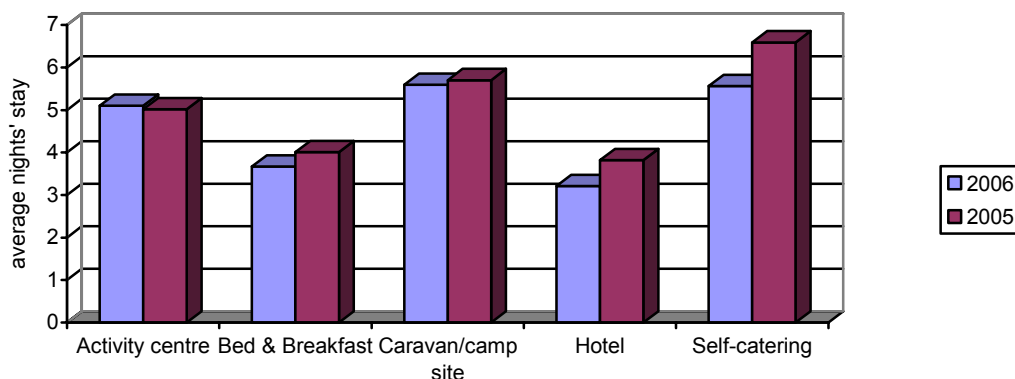
In 2006, the average number of nights spent in West Cork tended to rise in the summer months, in keeping with the traditional family holiday, and drop off towards the autumn, with December giving the longest stays, while in 2005, stay length in January and February was almost at its peak, in line with July/August, and Christmas visits were only three nights long on average. In the spring, average lengths of stay dropped marginally between 2005 and 2006, 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	2006
Annual average	4.9	4.55
January	5.0	2.54
February	5.4	3.30
March	3.8	4.76
April	4.8	3.29
May	4.7	3.83
June	4.0	4.61
July	5.1	4.43
August	5.2	5.48
September	4.8	5.18
October	4.1	2.63
November	3.2	3.81
December	3.0	5.71

Length of stay by accommodation type

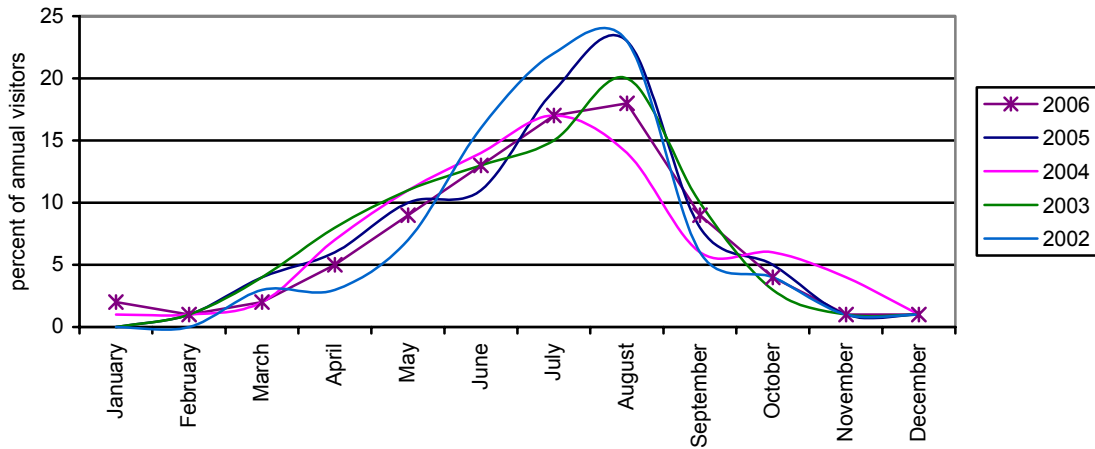
The following chart compares the average number of nights stayed in West Cork, against the type of establishment visited in 2005 and 2006. It is clear that cards completed by visitors to day-time attractions, such as visitor centres, give details about the visitors' stay in West Cork, and not their time at the specific establishment. Those staying in B&Bs, guest houses and hotels stayed about 4 nights, compared to between five and six days in a camping or caravan site, about three nights in a hotel and about 6 or 7 nights in self catering accommodation.



	2006	2005
Bed & Breakfast	3.67	4.01
Caravan/camp site	5.59	5.70
Hotel	3.21	3.82
Self-catering	5.56	6.59

Time of year visited

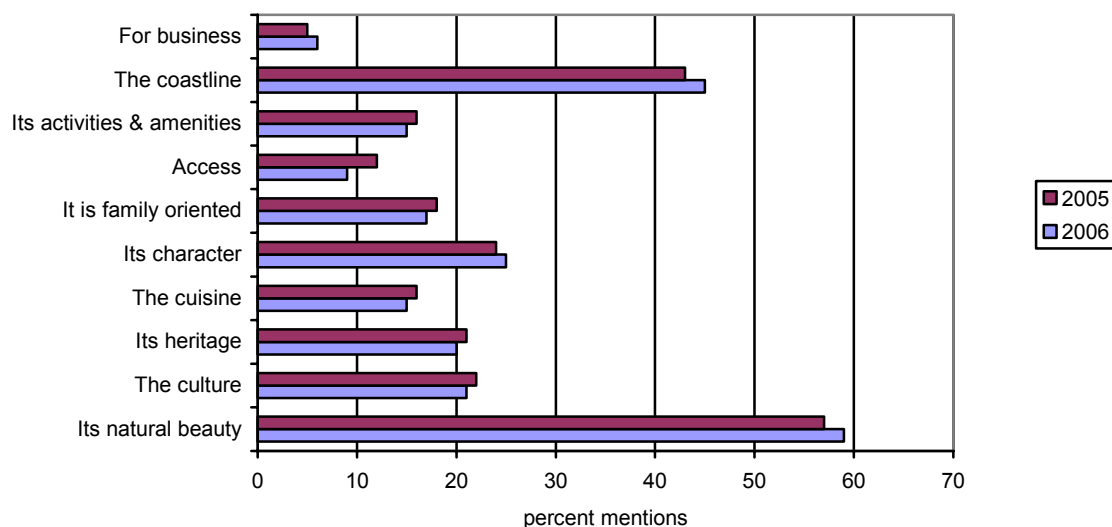
As has already been illustrated, the proportion of visitors rises during the summer high season, and in 2006, this was mainly between April/May and August. Interestingly, despite increasingly good spring weather between April and June, there has not been a significant shift away from the July/August peak season, reflecting academic holidays as much as weather patterns.



	2005	2006
	1585	1242
	%	%
January	*	2
February	1	1
March	4	2
April	6	5
May	10	9
June	11	13
July	19	17
August	23	18
September	8	9
October	5	4
November	1	1
December	1	1

Reasons for visiting West Cork

Between 2005 and 2006 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 to one in ten respondents to the survey.

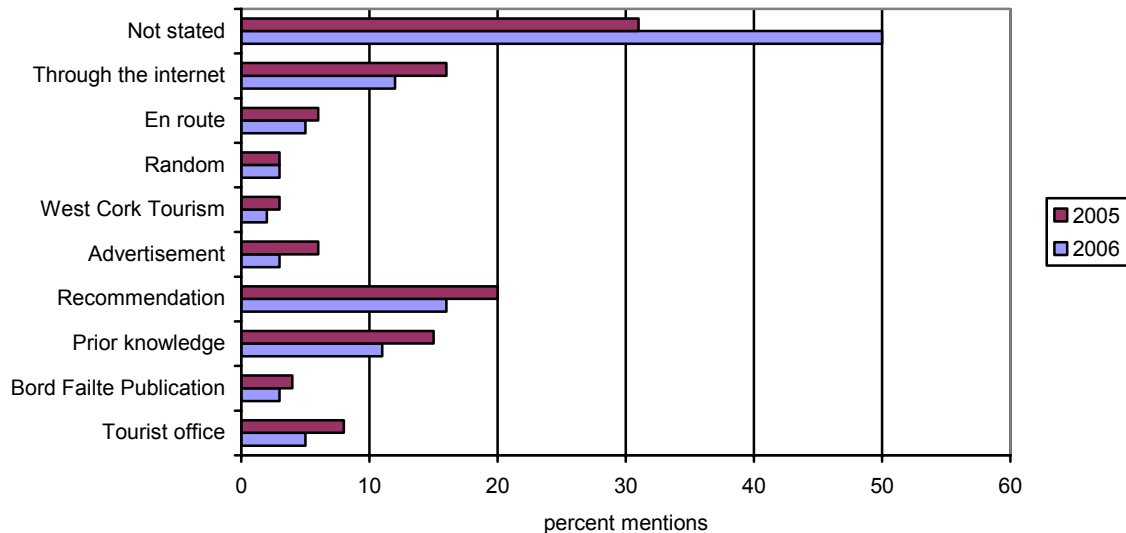


The longer term trends are also remarkably stable. It isn't surprising that the natural charms of West Cork are equally important every year, but some of the other factors are within the control of West Cork's tourist industry. The number of tourists mentioning West Cork's family orientation is declining, 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	2006
Base	1585	1242
	%	%
Its natural beauty	57	59
The culture	22	21
Its heritage	21	20
The cuisine	16	15
Its character	24	25
It is family oriented	18	17
Access	12	9
Its activities & amenities	16	15
The coastline	43	45
For business	5	6

Method of selecting accommodation/establishment

While half of those surveyed in 2006 did not answer this question (up from 31% in 2005), 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 more valuable, although levels of use in 2006 are significantly lower than they were in 2005, and levels are very low considering the speed of growth in online booking for holidays and international travel.

	2005	2006
	1585	1242
	%	%
Tourist office	8	5
Bord Failte Publication	4	3
Prior knowledge	15	11
Recommendation	20	16
Advertisement	6	3
West Cork Tourism	3	2
Random	3	3
En route	6	5
Through the internet	16	12
Not stated	31	50

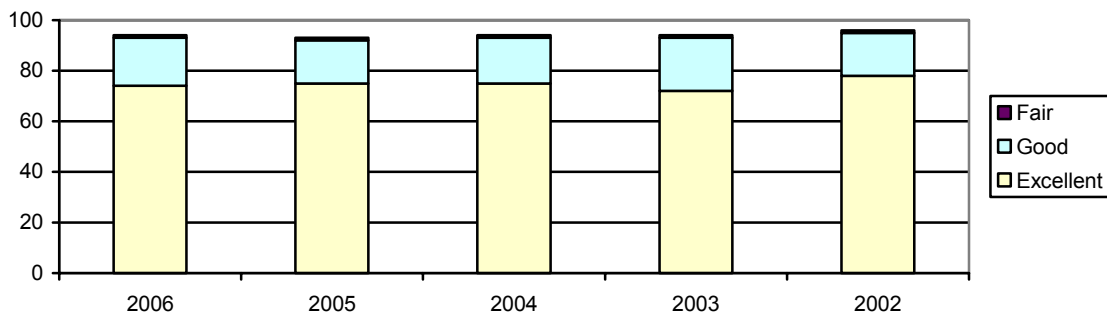
Ratings of Accommodation/establishment

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.

It is important to note that the excellent ratings below reflect the members commitment to training and product service. It is encouraging to see extremely high satisfaction ratings across all sectors. Furthermore, where reference is made to “value for money”, the price factor does not appear to be an issue as expectations are met.

Product quality

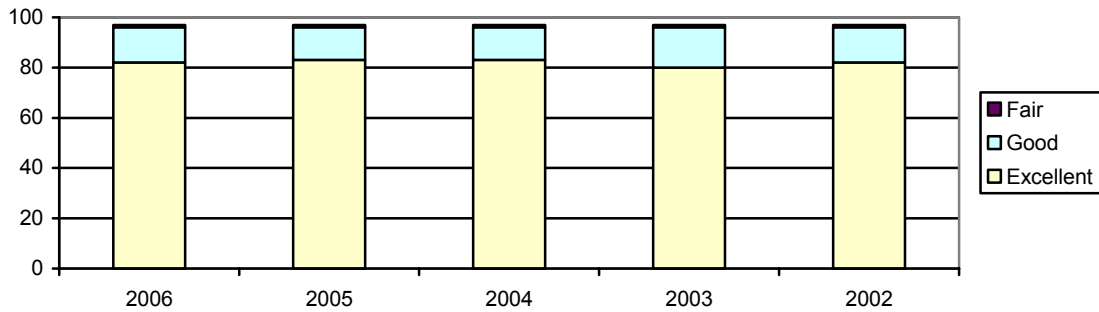
In 2006, much as in 2005, three quarters of visitors give their establishment an excellent rating for product quality and a further 19% a good rating. This has not changed significantly since 2002.



Product quality	2005	2006
	1585	1241
	%	%
Excellent	75	73
Good	17	19
Fair	1	1
Poor	*	*
Not stated	6	7
Mean score	3.78	3.78

Service quality

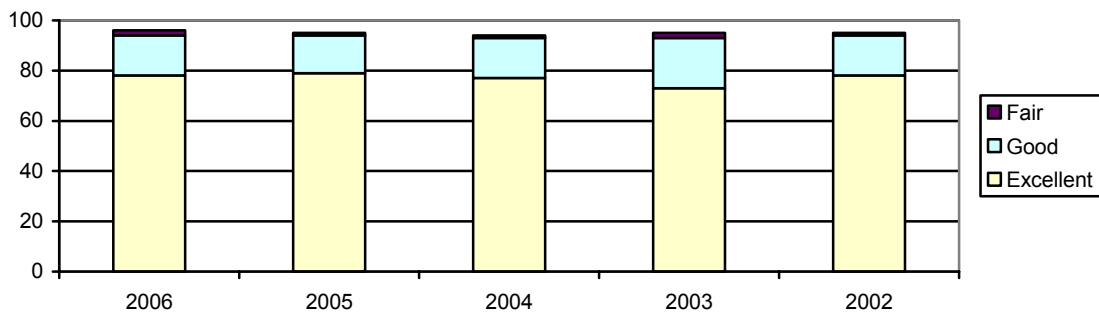
Service quality ratings are slightly higher than those for product quality, with 82% of visitors in 2006 giving service an excellent rating and a further 14% a good rating. This is an improvement on the 2003 figures, although three respondents give their establishment a 'poor' rating in 2006.



Service quality	2005	2006
	1585	1241
	%	%
Excellent	83	82
Good	13	14
Fair	1	1
Poor	*	*
Not stated	3	3
Mean score	3.85	3.83

Efficiency

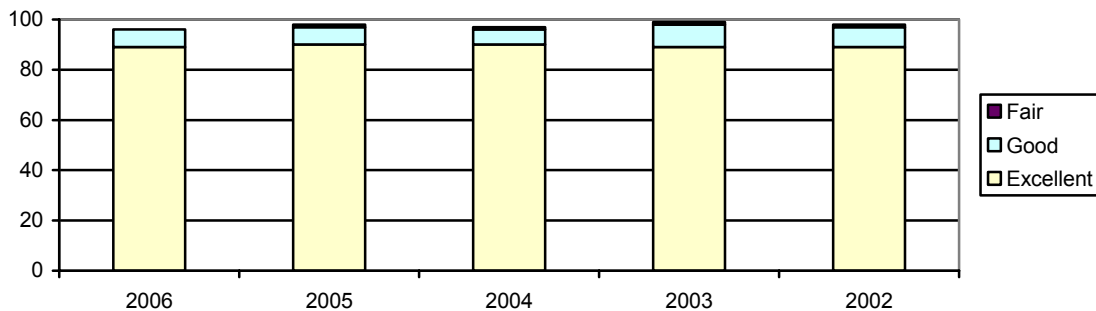
The levels of efficiency have improved in West Cork establishments since 2000, and almost four in five visitors consider them excellent in 2006.



Efficiency	2005	2006
	1585	1242
	%	%
Excellent	79	78
Good	15	16
Fair	1	2
Poor	*	*
Not stated	5	4
Mean score	3.81	3.79

Friendliness

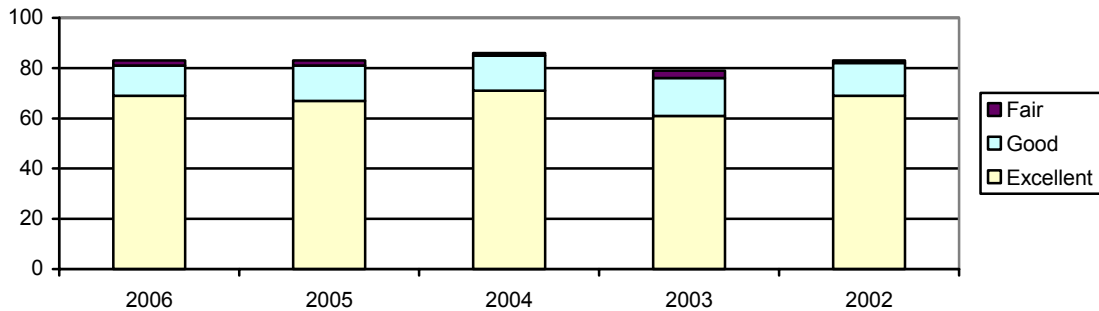
There is almost universal praise for the friendliness of the establishments in West Cork, with 99% of visitors rating it excellent or good in 2006. This has remained fairly stable in the last five years.



Friendliness	2005	2006
	1585	1242
	%	%
Excellent	90	89
Good	7	7
Fair	1	*
Poor	*	*
Not stated	2	3
Mean score	3.91	3.92

Food

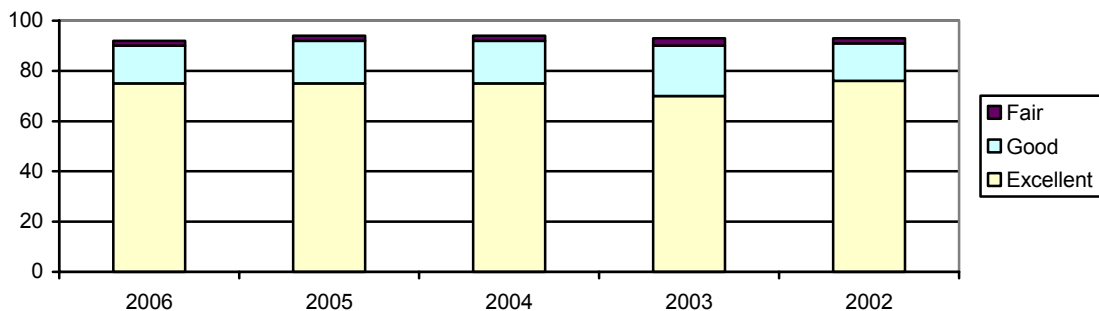
While the overall ratings for food are less positive than for the previous measures, with only seven in ten visitors rating the food as 'excellent' and 12% as 'good' in 2006, there has been some upward trend in this rating compared to 2003.



Food	2005	2006
	1585	1242
	%	%
Excellent	67	69
Good	14	12
Fair	2	2
Poor	*	*
Not stated	17	17
Mean score	3.79	3.81

Hygiene

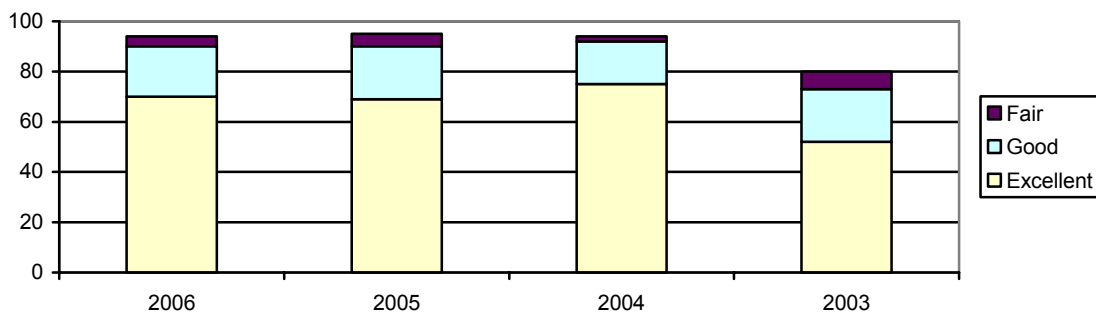
Ratings for the level of hygiene in the establishments surveyed in 2006 are high, with 90% of all visitors rating them as good or excellent. There has been no discernible change in this rating over the last five years, although in 2006, one percent of respondents rated their experience of hygiene as poor.



Hygiene	2005	2006
	1585	1242
	%	%
Excellent	75	75
Good	17	15
Fair	2	2
Poor	*	1
Not stated	6	7
Mean score	3.76	3.76

Value for money

The final measure – value for money – was introduced in 2003, and saw an improvement in 2004, but has settled at a mean score of 3.7, with the 'excellent' rating being given by 70% of respondents in 2006, down from 75% in 2004, and with six respondents giving their accommodation a poor rating this year.



	2005	2006
	1585	1242
	%	%
Excellent	69	70
Good	21	20
Fair	5	4
Poor	1	*
Not stated	5	5
Mean score	3.66	3.69

Performance ratings by type of establishment – 2006

The following table shows mean scores for each performance rating by type of establishment booked in 2006 (excluding hostels, restaurants and visitors centres, which had small bases). It is interesting that the bed and breakfasts achieved the highest ratings for all aspects of performance again in 2006, closely followed by activity centres. Hotels did not score as highly on product and service quality, efficiency, their food or hygiene, but scored well on friendliness. In fact, Hotels were less well rated than camping and caravan sites on several measures.

	Activity centre	B&B/Guest house	Camping /caravan	Hotel	Self-catering
Base	293	487	71	66	345
Product quality	3.80	3.88	3.62	3.69	3.73
Service quality	3.85	3.94	3.81	3.72	3.77
Efficiency	3.82	3.90	3.62	3.74	3.79
Friendliness	3.94	3.98	3.97	3.85	3.86
Food	3.80	3.90	3.58	3.67	3.79
Hygiene	3.81	3.87	3.61	3.69	3.65
Value for money	3.70	3.80	3.70	3.50	3.68
Other	3.91	3.90	3.65	3.80	3.91

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

