

CONSUMER RESPONSE CARD SURVEY 2000



Fuchsia Brands

Consumer Response Card Survey

2000

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INTRODUCTION

This report has been compiled from the information taken from the **2000 Consumer Response Cards**. It comprises of details on:-

- ☛ Total Cards Returned
- ☛ Nationalities of Respondents
- ☛ Month of Stay
- ☛ How Establishments were Chosen
- ☛ Why West Cork was Chosen as a Destination
- ☛ Why People from different Countries come Here
- ☛ Satisfaction with Tourism Product
- ☛ Preferred Month of Stay by Country

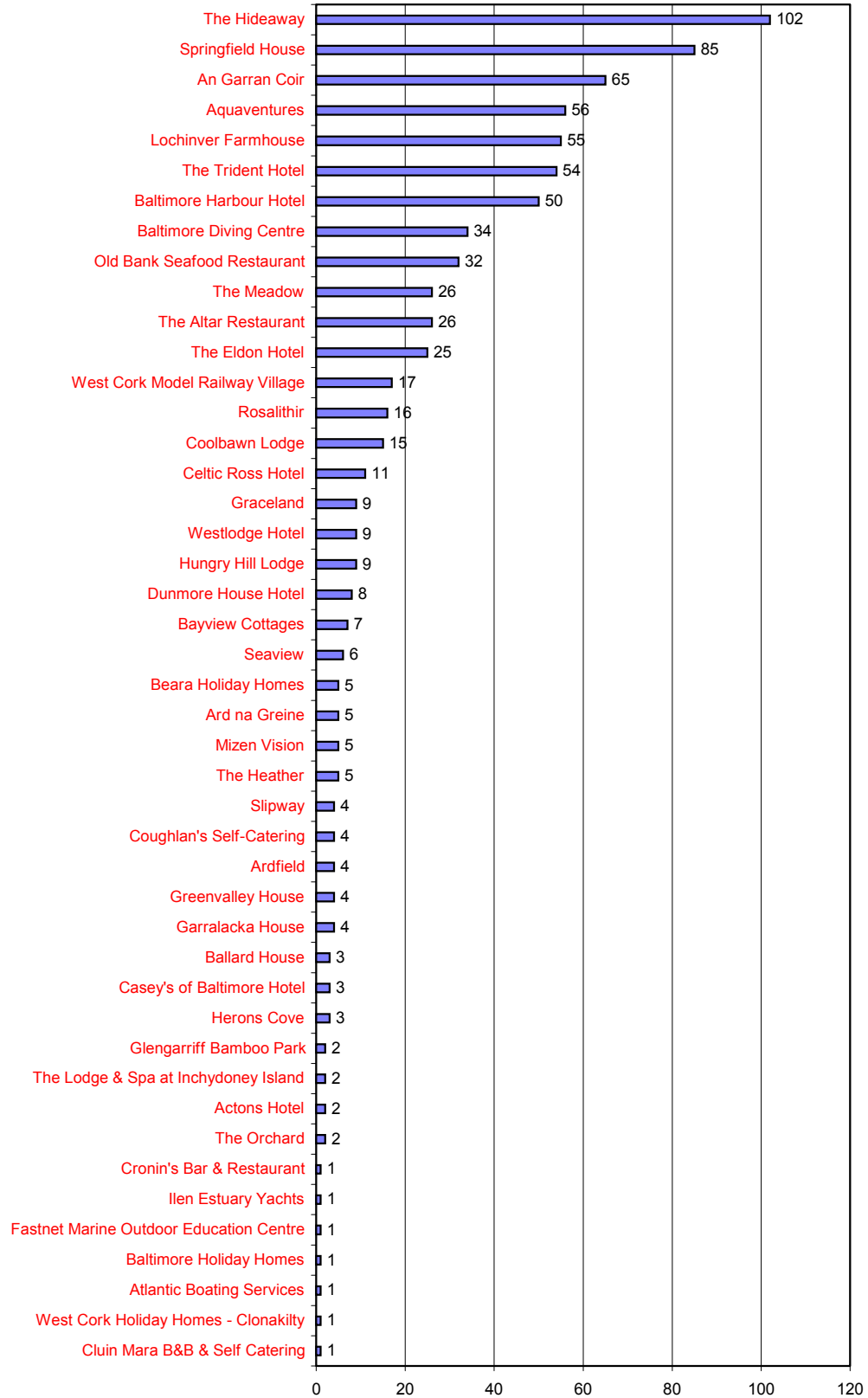
These statistics should be useful when evaluating and planning your marketing strategy and the performance of your establishment.

Number of Cards Returned

By the end of the year 2000, we received a total of 817 cards, which was up from the previous year by 22 cards. This increase is due to more establishments returning cards (45 in 2000 compared to 35 in 1999). However, the average return has reduced from 23% to 18%. A portion of this is attributed to new establishments using the cards for the first time, renovation works, and the fact that self-catering units use less cards because the length of stay is normally 2 weeks per unit. We should have had an even higher number of returns, but Baltimore Holiday Homes and Kinsale Holiday Village, who had the highest number of returns in 1999, have come to the end of the BES scheme and are no longer managed collectively. The Hideaway had the best return of 102, therefore it was not surprising that the winner from the consumer response card draw stayed at this establishment. Springfield House followed with a total of 85 cards and the third highest returns came from An Garran Coir with 65. It is encouraging to see that more establishments are participating in the scheme and we look forward to higher returns in 2001. Establishments are reminded that the availability and use of the Consumer Response Cards are a prerequisite of Fuchsia Brand approval. Remember that feedback is just as important for you as it is for us.

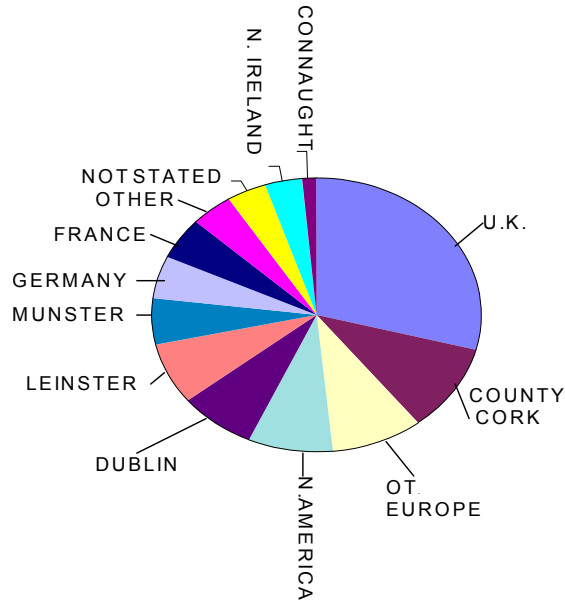
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Total Cards Returned 2000



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NATIONALITIES OF RESPONDENTS

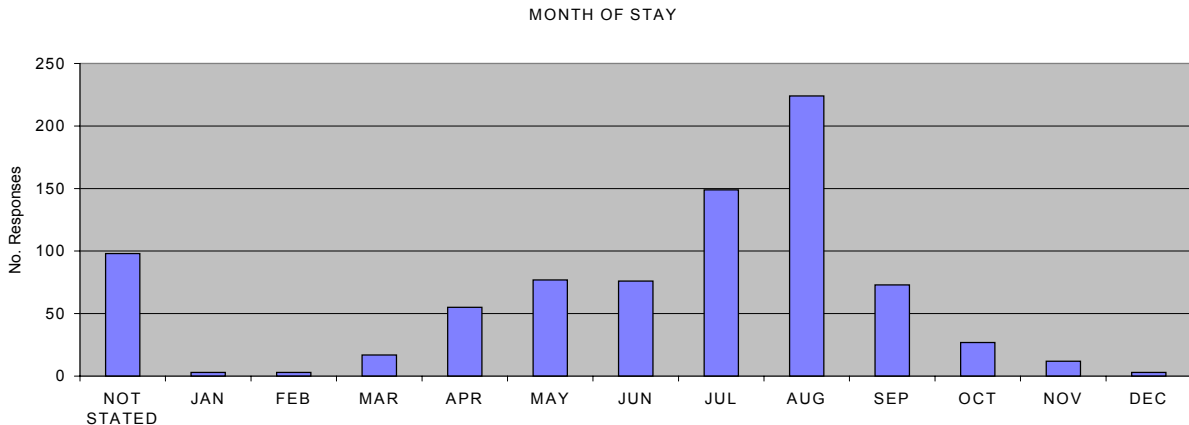


The main nationality to visit our region came from the domestic visitor, with the highest number coming from the Cork area followed by Dublin, which was much similar to 1999. This reflects the recognition that these people have of West Cork, the type of visit (week-end breaks, business conferences, etc.) and accessibility. Our U.K. visitors represented 29% of the total, which is almost on a par with the 1999 statistics. We had an increase of tourists from Germany, France and the U.S. by 2% each, probably due to ease of access through more chartered flights and better ferry service.

According to Bord Failte statistics, there has been an increase in the number of foreign visitors, as follows:- Up 6% from Britain, 5% from Mainland Europe, 8% from North America and 6% from the rest of the world.

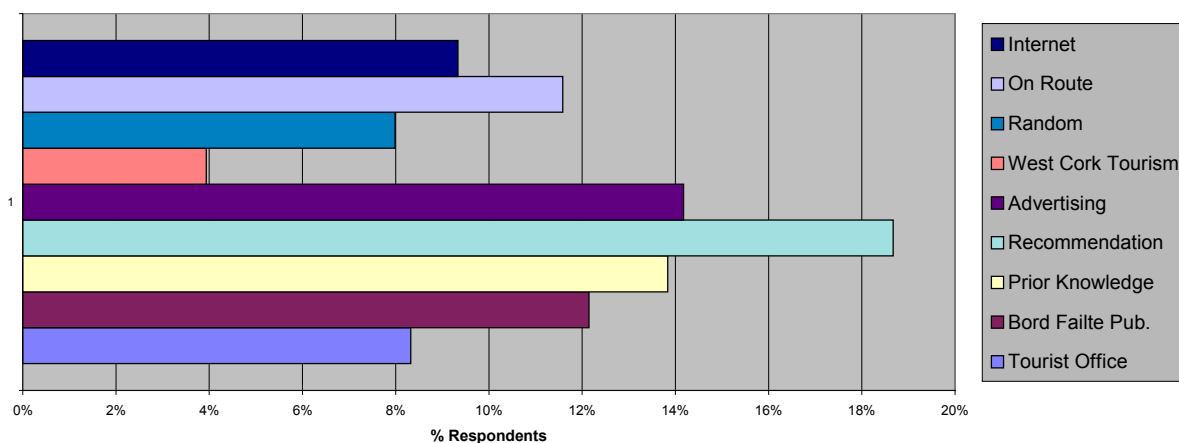
Month of Stay

July and August remain the peak months, demonstrating the skewed seasonality of domestic tourism. As with 1999, September seemed to be a more popular month for holidays than June. There was an increase in the number of visitors during April and May, compared to 1999, which is good to see as the shoulder season is one of quietest times for most establishments.



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HOW ESTABLISHMENTS WERE CHOSEN



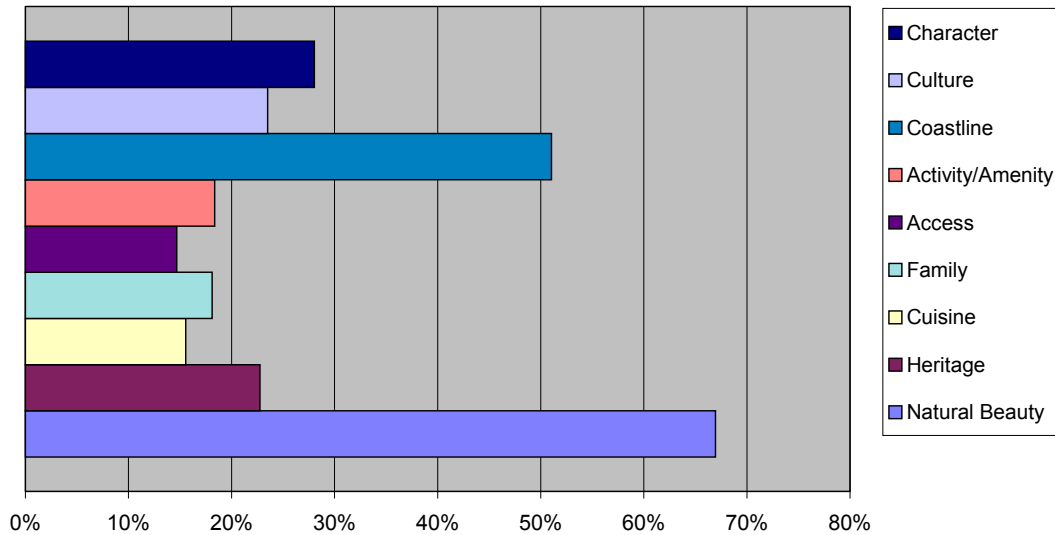
Similar to the previous survey, “recommendation” and “prior knowledge” are the main contributory factors when choosing an establishment, most notably for Visitors Centres and Hostels. There was a very significant increase, as predicted, in the use of the internet, most predominantly with the self-catering sector. This has risen from 4% in 1999 to 9% in 2000 and this trend is expected to continue. Included in the table below is the % use of the internet for the various categories of establishments. Activity holidays, followed by B&B’s, are the next highest to be sourced through the internet.

The impact of advertising varies between the different accommodation/activity types. It works particularly well for B&B’s, Hotels and Activity Centres. In the case of B&B’s, it is mainly through various guides (Guide du Routard, Shamrock Cottages, etc.), while for Hotels it is newspapers (Examiner, Independent, etc.) or guides (Lonely Planet) and for Activity Centres it is specialist magazines (Diving Magazine, Lets Go Guide, Rough Guide to Ireland, etc.). Travel Guides have been mentioned in the selection of restaurants.

| Category | Tourist Office | BF Publ. | Prior Knowledge | Recomm- endation | Advert | West Cork Tourism | Random | On Route | Internet |
|----------------|----------------|----------|-----------------|------------------|--------|-------------------|--------|----------|----------|
| ACTIVITY | 2% | 3% | 15% | 21% | 22% | 3% | 12% | 7% | 14% |
| B&B/Guest H | 15% | 15% | 9% | 20% | 12% | 4% | 8% | 10% | 7% |
| CAR.&CAMP. | 6% | 24% | 8% | 12% | 13% | 3% | 4% | 24% | 6% |
| HOSTEL | 0% | 0% | 0% | 31% | 15% | 8% | 15% | 23% | 8% |
| HOTEL | 7% | 11% | 20% | 22% | 18% | 4% | 7% | 5% | 6% |
| RESTAURANT | 7% | 4% | 21% | 23% | 4% | 8% | 13% | 15% | 4% |
| SELF-CAT. | 2% | 9% | 11% | 9% | 16% | 2% | 4% | 2% | 45% |
| VISITOR CENTRE | 0% | 0% | 71% | 0% | 0% | 0% | 0% | 29% | 0% |

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Why West Cork was Chosen as a Destination in 2000



The above statistics are in line with the 1999 figures. Natural Beauty, Coastline and Character remain to be the main attributes when choosing West Cork as a holiday destination. Family orientation did not rate as highly in 2000 as it did in 1999 (19% versus 24%) while culture and heritage showed an increase of 4% and 2% respectively. Interestingly, there is a 2% decrease in selecting activities/amenities as a reason for coming to West Cork, which is surprising as the new trend seems to be for activity holidays. This suggests that tourists may not be aware of the facilities available and that more marketing is required in this sector.

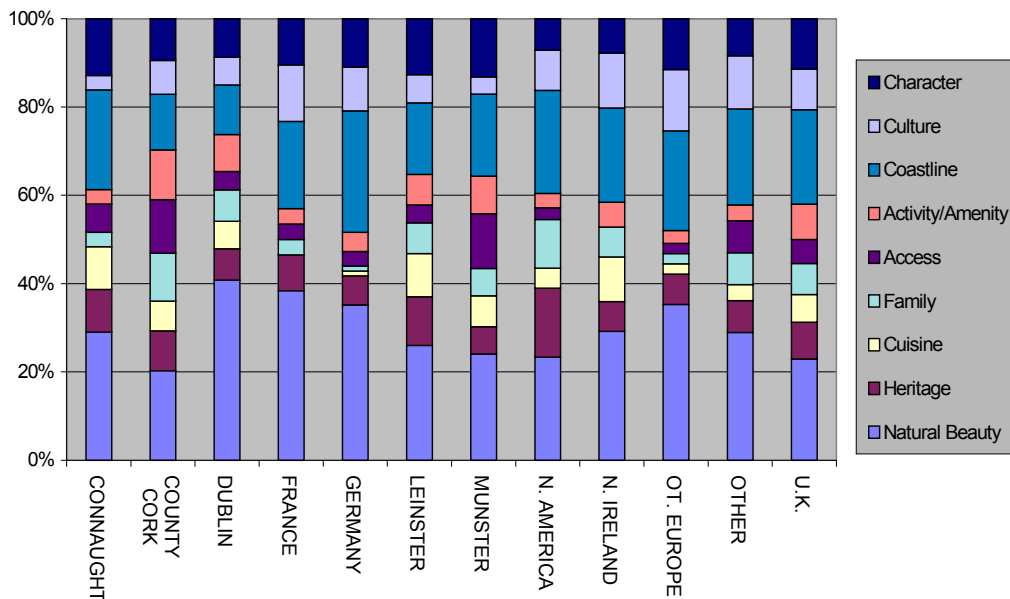
It is clear that our environment, both natural and built, must be protected as it contributes significantly to the tourist industry in West Cork. This sentiment is reflected in the various phrases mentioned in the comment cards such as:-

“Beauty of rugged landscape”
“Breath taking country side”
“Unique scenery”
“Unspoilt areas”
“Scenic coast”
“Pure, untouched coastline”
“Tiny, winding Fuchsia lined roads”

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The following graph gives an indication of the selection diversity of countries when choosing West Cork as a holiday destination. This is useful when targeting for a particular segment. For example, “Coastline” and “Heritage” are rated highly in North America and “Family Orientation” also attracts them. Those from Cork County consider “activities/amenities” when deciding. This reflects the interest in hillwalking, cycling, birdwatching, etc. “Cuisine” is taken into account mainly by the domestic market and U.K. Again, this may reflect the higher recognition of the regional brand and the value of the brand on food produce. France does not consider “Cuisine” at all. This mirrors the 1999 results. Visitors from Dublin have chosen “Natural Beauty” as the main factor. Predictably, ease of “Access” is favoured in Cork County and Munster, facilitating short breaks. One main difference from the previous survey is with Connaught visitors. In 1999, they rated “Family Orientation” as their primary deciding factor – this has now changed to “Coastline” in 2000. This is also similar for Northern Ireland visitors, but not to the same extent.

Why people from different countries come here

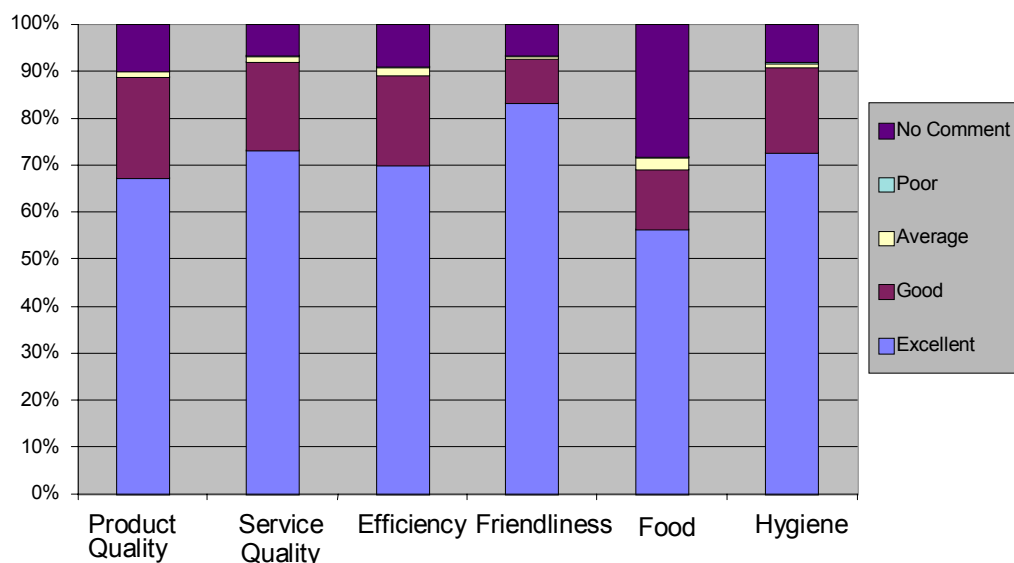


Below is a table taken from the Bord Failte “Tourism Facts 1999” publication. (The 2000 figures are unavailable at present).

| % | Total | Britain | Mainland Europe | North America | Rest of World |
|--------------------------------|-------|---------|-----------------|---------------|---------------|
| Holiday | 37 | 28 | 43 | 57 | 48 |
| Visit Friends/Relatives | 24 | 30 | 14 | 19 | 20 |
| Business/Conference | 25 | 29 | 27 | 12 | 19 |
| Other | 14 | 13 | 16 | 12 | 13 |

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Satisfaction with Tourism Product



It is evident from the above graph that our visitors highly rate the services provided by our establishments. “Friendliness” again appears to be our best attribute. There is a high “no comment” response in relation to food – this is due to the fact it is not relevant to self-catering and hostel accommodation, amenities, etc. There is an almost negligible “poor” rating. The positives certainly outweigh the negatives – the comments below echo this. The product in all its diversity represents the essence and values of the brand and reflects the commitment of the different establishments.

Negatives

“Rubbish”
“Cuisine could be improved/varied”
“Not very wheelchair or buggy friendly”

Positives

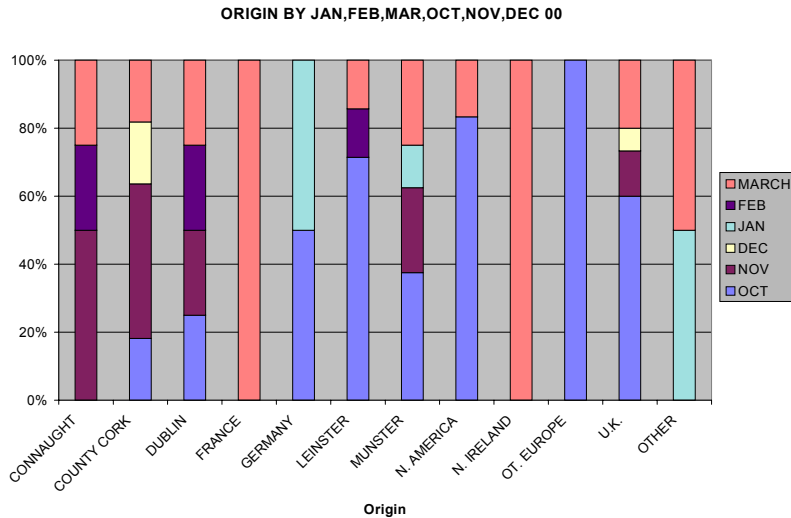
“A little bit of heaven”
“A very warm welcome”
“Very good breakfast with quality products”
“Very responsive & perceptive”
“Individual care”
“Enthusiasm for quality – not frills”
“Hospitality and friendliness”

The table below shows attributes ranked by % of Excellent or Good:-

| <i>Attribute</i> | <i>2000</i> | <i>1999</i> | <i>1998</i> |
|------------------------|-------------|-------------|-------------|
| <i>Friendliness</i> | 99% | 98% | 96% |
| <i>Food</i> | 96% | 98% | 93% |
| <i>Service Quality</i> | 99% | 95% | 92% |
| <i>Efficiency</i> | 98% | 93% | 90% |
| <i>Hygiene</i> | 99% | 91% | 79% |
| <i>Product Quality</i> | 98% | 91% | 91% |

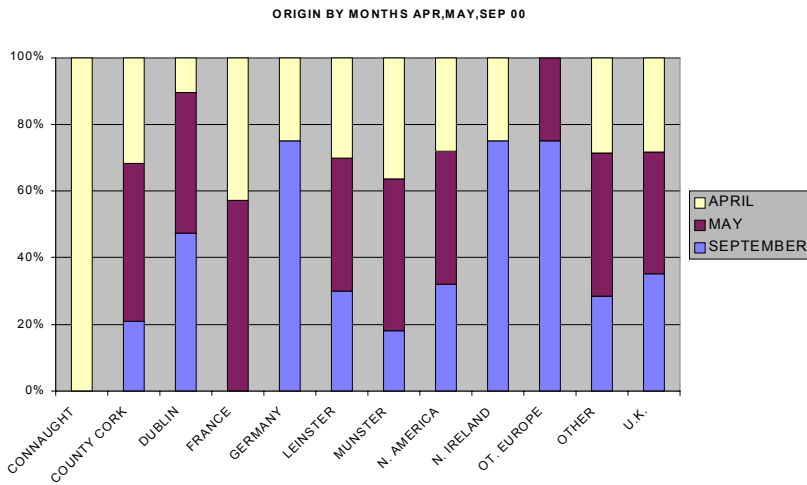
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The following graphs of off peak, shoulder and peak season indicate the month of preference for our visitors at various times of the year.



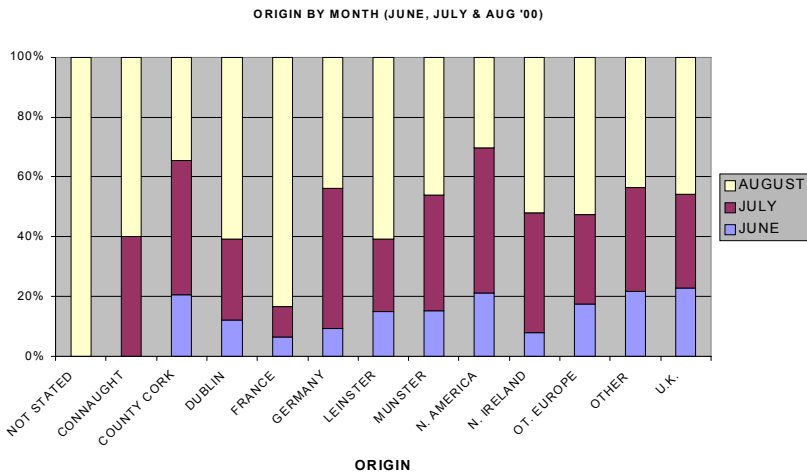
OFF PEAK SEASON

The month of March was favoured by visitors from France and Northern Ireland. October was a popular month for Other Europe, North America, Leinster and U.K. visitors, probably due to the school mid term. County Cork and Connaught visitors chose November, most likely for week-end breaks. Americans did not tend to travel in January, February, November and December. January was the selected month for many Germans and for those visitors outside the listed



SHOULDER SEASON

Connaught visitors chose the Easter season, as their preferred month. There was an even spread of visitors during May, with the exception of Connaught, Germany and Northern Ireland. September was popular with Germany, Ireland and other parts of Europe.



PEAK SEASON

July and August were the only two months when we had representatives from each of the countries listed. France selected August as the main month for travelling to West Cork, while July was more popular with County Cork and N. America.

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