

West Kerry Gaeltacht Tourism Survey 2010

Report authors | Fiona Tobin and Feargus Dunne
Institute of Technology Tralee, Co. Kerry



Table of Contents

Foreword	iii
Introduction	iv
Project Brief	1
Research Methodology	2
Population of Interest & Sampling	
Data Collection	
Questionnaire Design	
Data Analysis	
Section 1: Research Findings – Profile of Visitors	3
Section 2: Profile of the West Kerry Gaeltacht as a Tourism Destination	7
Section 3: Profile of the Tourist Experience	12
Section 4: Implications of the Research	15
Limitations of the Research	16
Appendix A	17
Appendix B	24

Foreword

The West Kerry Gaeltacht Tourism Survey 2010 is an initiative of Údarás na Gaeltachta, the Gaeltacht authority responsible for the economic, social and cultural development of the Gaeltacht regions. The tourism industry is one of the principal economic sectors in the West Kerry Gaeltacht and the commissioning of this research is in response to a dearth of in-depth information regarding the profiles, attitudes and perceptions of visitors to the area.

An tÚdarás believe the availability of such information is a key resource in determining future policy in relation to the development of the tourism industry locally. Such information will act as a key influencer in determining investment priorities in the future for grant-aid and other government supports which are administered by those State agencies which have a shared responsibility for the development of the sector.

Above all, such information is valuable to the local tourism industry and should assist them in targeting key markets, providing higher levels of customer satisfaction and developing new products and services which will form part of the mature tourism offering of the West Kerry Gaeltacht area.

We would like to thank our colleagues in Fáilte Ireland for their assistance in compiling the questionnaire and for providing us with the use of their facilities. We are indebted to the survey collectors for their diligence and hardwork in completing the survey enumeration. We are grateful to the authors of the report, Feargus Dunne and Fiona Tobin of the Institute of Technology Tralee for their valued advice and for their analysis of the survey findings. We would like to thank Comharchumann Turasóireachta Chorca Dhuibhne, and the local tourist industry, especially those businesses or enterprises that provided assistance on a regular basis during the course of the 12 week survey.

Finally, we would like to thank all the tourists who participated in this survey. We hope the information gathered here will assist tourism agencies and the local tourism trade in ensuring that they continue to return to the area again over the coming years to enjoy the best of what the Gaeltacht tourism product has to offer.

Éamonn Ó Neachtain
Regional Manager, Údarás na Gaeltachta



Introduction

In June 2010, Údarás na Gaeltachta, undertook a survey of visitors to the West Kerry Gaeltacht area. Thereafter, An tÚdarás commissioned a report to document and analyse the findings of the tourism survey which was conducted over the course of the summer 2010.

The rationale for the research was driven by the fact that the tourism industry is one of the principal economic sectors in the West Kerry Gaeltacht. The development of the sector is a priority for Údarás na Gaeltachta and the agency has invested significant funds in developing infrastructure and services over recent years. Planning for the future development of the sector depends on current and relevant information concerning the profiles, attitudes and perceptions of visitors to the area.

The main objective of the study was to establish some key information sets in relation to the local tourism industry in the West Kerry Gaeltacht area in 2010 including;

- ✦ Demographic profile of the visitor
- ✦ Reasons for choosing the area for their holiday
- ✦ Visitor satisfaction ratings with accommodation, food and attractions in the area.

The study aimed to provide information which would support a comparative analysis of the local survey findings and the annual visitor attitude surveys by Fáilte Ireland. The information compiled also supports analysis of previous surveys carried out in the study area, most notably the County Kerry Tourism Research (2004).

The questionnaire was formulated by Údarás na Gaeltachta with technical support from colleagues from Fáilte Ireland and administered by a team of enumerators recruited by An tÚdarás.

The findings were analysed by Feargus Dunne and Fiona Tobin from the Department of Hotel, Catering and Tourism, at the Institute of Technology Tralee, Co. Kerry.

Project Brief

The authors of the report were requested to review the County Kerry Tourism Research (2004) and other relevant tourism reports to facilitate comparisons between findings from this report and previous data sets.

The main informational objectives outlined by Údarás na Gaeltachta were:

Profile of Visitors – number of visitors, number of repeat visitors, compilation of a demographic profile

Profile of the Tourism Experience – Levels of satisfaction with accommodation, food and facilities and overall satisfaction including comments, activities/pastimes engaged in

Implications of the Research – Conclusion and Recommendations

To address these objectives this report is structured in the following manner:

Section One – Profile of Visitors to include:

Gender, age, occupation, country or county of origin, method of entry etc.

Section Two – Profile of the West Kerry Gaeltacht area as a tourism destination to include:

Main purpose of visit, frequency of visit, nights spent in the area, important factors in choosing to visit the area etc.

Section Three – Profile of the Tourism Experience

Overall satisfaction levels with various sectors, likelihood of repeat visit etc.

Section Four – Implications of the Research

Research Methodology

Population of Interest and Sampling

In order to achieve the research objectives, the population of interest was identified as all tourists to Corca Dhuibhne or The West Kerry Gaeltacht area. A simple random sample of this population of interest was selected.

The sampling method employed was the interruption of the tenth person to pass the interview location after the completion of the previous interview. Should this person be inappropriate to the population of interest (*already surveyed/a resident*) or choose not to respond, then the interviewer was instructed to wait for the next tenth person.

Completed questionnaires were collected in a number of venues in Dingle town and west of the town. The majority were collected around the main tourist areas in Dingle town – in the vicinity of the marina area.

The venues were chosen because they experience high pedestrian traffic levels. There were also a number of indoor locations selected to allow for inclement weather conditions including the Dingle Tourist Office, Mara Beo (Dingle Aquarium), Ionad an Bhlascaoid (Blasket Island Centre) in Dún Chaoin and the Museum in Baile an Fheirtéaraigh. The survey was conducted across all seven days of the week between the times of 9.00am and 9.00pm over a 12 week period.

In total, 577 valid interviews were completed. The sample size of almost 600 and the type of sampling used is considered to give a broad perspective of the range of tourist visiting the area.

Data Collection

Údarás na Gaeltachta provided training and instruction to enumerators, prior to the commencement of the survey. All enumerators carried out a number of pilot surveys which were analysed and errors identified and addressed. Completed surveys were then examined and validated.

Questionnaire Design

Údarás na Gaeltachta, in consultation with Fáilte Ireland and other relevant parties, designed a 23 question survey in order to achieve the stated aims of the research project. In order to standardise the responses and to eliminate the risk of interpretational errors at analysis stage, the survey comprised of mainly 'closed questions'. Also, a variety of simple, balanced, ordinal scales (*sequential/ranking*) were employed to measure various attitudes among respondents. This style and structure of questionnaire would best achieve the objectives of the research.

The authors of this report met with Údarás na Gaeltachta after the initial design stage of the questionnaire, to consider potential problems and make recommendations for the final questionnaire. These meetings resulted in important amendments being made to the final questionnaire.

A copy of the final questionnaire is available in Appendix A of this report.

Data Analysis

The authors of the report used the SPSS (Statistical Package for Social Sciences) data analysis programme in their analysis of the data which had been generated by the survey.

Section One

Research Findings – Profile of Visitors

Of the survey respondents, just over half (52.9%) were male with the remaining female respondents representing 47.1% of the sample. This gives an equitable gender balance in the sample.

In terms of the age of respondents, 47.7% were in the 35-54 age bracket, with those visitors of 55+ years accounting for the second largest group (30.2%), those between 19-34 years accounted for 20.5% of survey participants. Although other national surveys do not allow for direct comparison with these figures, it appears that the West Kerry Gaeltacht area attracts an older cohort i.e. predominantly from the over 35 age groups. 1.4% of respondents were under 18 years of age*.

Most visitors surveyed were travelling as part of a couple (42.4%), although a significant percentage was in the region as part of a family group (32.9%) and with other adults (15.4%). Almost 10% of respondents were travelling alone. This has implications for the industry in the area, in terms of how it accommodates single travellers.

The majority of visitors sampled for the survey stated that the occupation of the chief earner in their household was from the Associate Professional & Technical category (31.5%), with 26.2% of respondents in the Managerial/Professional category (See final page of Appendix One). In total almost 58% were from these segments, which has obvious benefits for the study area in terms of these groups' propensity to travel and disposable income available. Figure 3 indicates the full range of occupations of those sampled.

FIGURE 1: GENDER OF RESPONDENTS

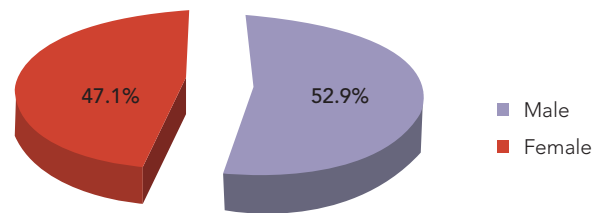
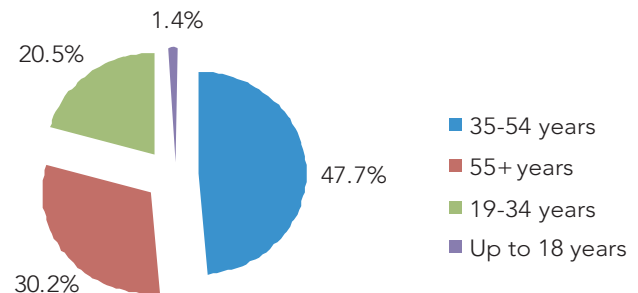
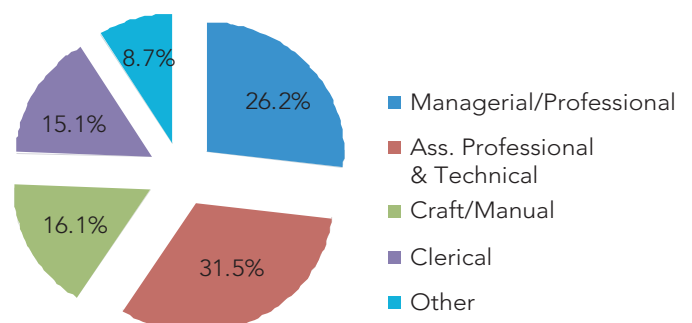


FIGURE 2: AGE OF RESPONDENTS



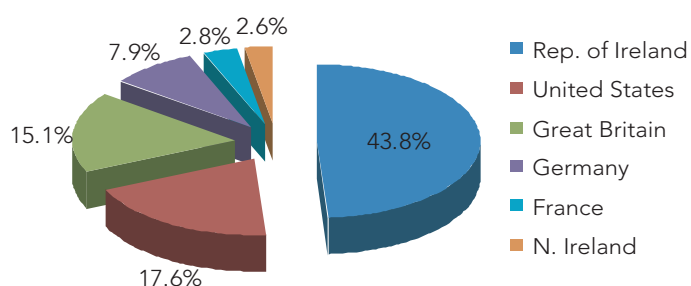
* The figure of 1.4% for under 18's does not reflect the number of under 18's visiting the area. Only under 18's accompanied by an adult were interviewed as part of this study.

FIGURE 3: OCCUPATION OF THE CHIEF EARNER IN THE HOUSEHOLD



In relation to the country of origin of respondents, the majority of visitors were not surprisingly, from traditional markets, with Republic of Ireland (ROI) tourists making up the largest visitor group at 43.8%, followed by the United States of America (U.S.A.) with 17.6%, Great Britain with 15.1% and Germany with 7.9% of visitors to the study area during the sampling period. The top 6 markets, representing 90% of all visitors are shown in figure 4.

FIGURE 4: COUNTRY OF ORIGIN OF RESPONDENTS



It is interesting to consider the figures above with regard to the County Kerry Tourism Research (2004)¹. Though that research covered the entire county of Kerry and therefore does not allow for direct comparison, the largest markets (outside domestic) in terms of country of origin in that survey were Britain (24%), Germany (18.4%) and U.S.A. (14%).

In this most recent survey the British market accounts for 15.1% of total visitors, which is a decline of almost 9% when compared with the 2004 County Kerry data. Tourism Ireland research from 2009², as well as more recent information from the Irish Central Statistics Office (CSO)³ point to a serious decline in the British market at present, with a 15% fall in visitors to this country in 2009 from the previous year, and continued leakage in the first six months of 2010.

That the U.S.A. is the largest international market visiting the West Kerry Gaeltacht area should be taken as a major positive, as Tourism Ireland research (2009) clearly indicates that North American visitors (predominantly USA), stay for longer and contribute more in terms of revenue as a proportion of visitors, than other markets.

In this study, the Republic of Ireland and Northern Ireland account for 46.4% of all respondents. In the County Kerry Tourism Research (2004) the figure for domestic (all-island) visitors was 31%. This increase could be partly explained by a combination of the current economic recession resulting in greater propensity for home holidays, as well as possibly the highly visible marketing campaign undertaken by Fáilte Ireland in spring/summer 2010 to promote this segment.

¹ County Kerry Tourism Research (February 2004)

² Tourism Ireland Facts & Figures 2009 – Island of Ireland Overseas Visitors

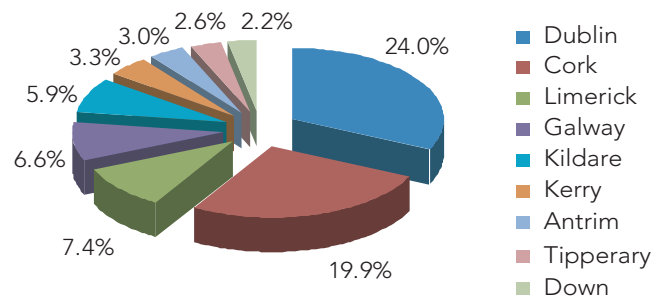
³ www.cso.ie/releasespublications/...travel/2010/overseas_travel_jun2010.pdf (accessed 10/11/10)



In total, 27 countries were represented among respondents to the survey which, other than the markets mentioned above, included visitors from Japan, Italy, Australia, Slovakia, Argentina, Israel, Spain, Switzerland, South Africa, Austria, Canada, New Zealand and the Czech Republic. Although the numbers from these countries during the sampling period were in the single digits, it is interesting to note the broad visitor base attracted to the West Kerry Gaeltacht area.

With regard to the county of origin of respondents, the survey shows that all 32 counties of Ireland are represented in the sample, although some counties contributed visitor numbers in the very low single digits. The largest groups of respondents were from counties Dublin (24%), Cork (19.9%), Limerick (7.4%), Galway (6.6%) and Kildare (5.9%). Counties with greater than 2% of visitors in the overall survey are shown in Figure 5.

FIGURE 5: COUNTY OF ORIGIN OF RESPONDENTS



In relation to international visitors to the area, for just over 70% of respondents air travel was the most common method of entry used, which corresponds exactly to the figure shown in the County Kerry Tourism Research of 2004.

Dublin airport was the access point used by almost half of visitors to the study area which is not surprising given;

- ✦ the airports large volume of international connections
- ✦ the fact that Dublin city is the capital of Ireland and has a profile to match other European capitals
- ✦ the Dublin region was visited by 51% of international visitors to Ireland in 2009 as part of their trip (Tourism Ireland 2009)
- ✦ Dublin is the number one destination of choice for respondents to this survey, with Connemara in second place and Dingle in third place (see figure 7).

FIGURE 6: METHOD OF ENTRY

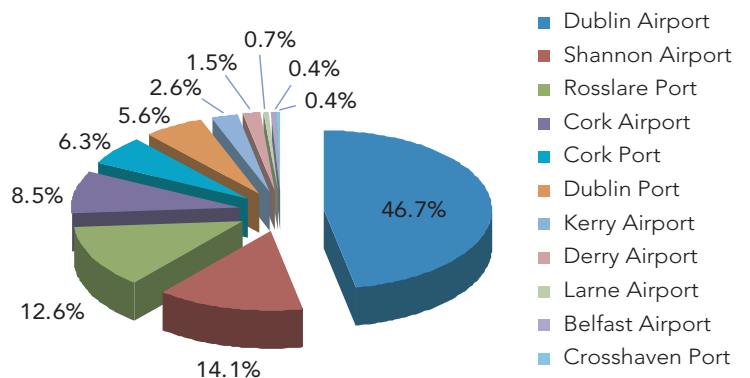


FIGURE 7: TOP THREE MAIN DESTINATIONS IN IRELAND FOR RESPONDENTS

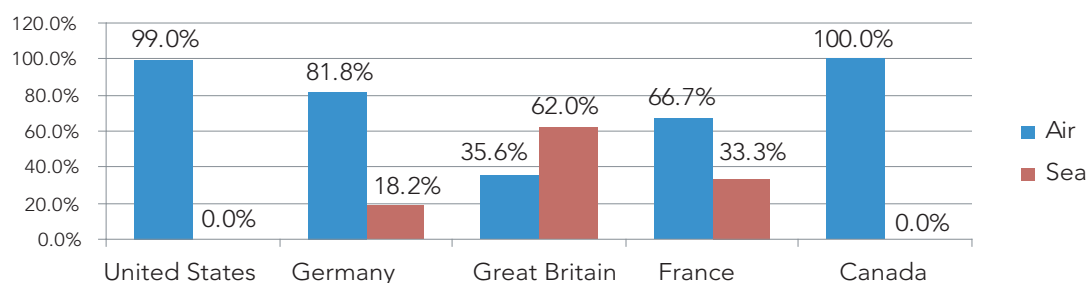
Ranking	1	2	3	4	5
1st Destination Choice	Dublin	Connemara	Dingle	Kerry	Galway
2nd Destination Choice	Kerry	Connemara	Dublin	Galway	Dingle
3rd Destination Choice	Kerry	Galway	Dublin	Connemara	Dingle

Shannon Airport was the second most important access point, with 14.1% of international visitors surveyed arriving through this airport. Shannon Airport has experienced well documented issues in recent years, including an expected decrease of 1 million in passenger numbers in 2010 alone⁴. As a response the Dublin Airport Authority (DAA) is now proposing a change in the business model at Shannon airport, moving away from the previous low cost model. It is important to again highlight the value of an international air access point in the west of the country.

The figure of 2.6% for international visitors to the area who arrived through Kerry airport reflects only those visitors from Great Britain on London and Manchester routes, and from Germany on the Frankfurt (Hahn) route. The survey does not take into account those who availed of domestic flights to Kerry airport for the purposes of visiting the West Kerry Gaeltacht area. This could be examined in more detail in a future study.

Sea travel was also shown in the survey to be important in terms of access, with Rosslare port identified as the third most used entry point for international visitors to the area after Dublin and Shannon airports, and Cork Port as the fifth most used entry point. Although beyond the scope of this research to confirm, the re-launch of the Swansea to Cork ferry route in spring 2010 after a four year cessation is likely to have provided a positive stimulus for visitor numbers to the area.

Figure 8 below illustrates the method of entry to the country utilised by visitors from the main international markets.

FIGURE 8: METHOD OF ENTRY BY MARKET

Totals may not add up to 100% to allow for the small number of respondents who arrived in the area by road from Northern Ireland.

⁴ Shannon Airport Strategy Announcement, November 2010

Section Two

Profile of the West Kerry Gaeltacht as a Tourism Destination

'Holiday/Leisure and Recreation' was the primary reason for over 81.6% of respondents to visit the study area, while 10.9% of visitors were there to 'visit friends and relatives' (VFR), and just 1.1% for 'business purposes'. In the County Kerry Tourism Research (2004), 95% of visitors surveyed were visiting Kerry for holiday/leisure only. Figures from the CSO⁵ and Fáilte Ireland⁶ point to 'holidays' as the main reason for visiting Ireland for just under 45% of international visitors in 2009.

FIGURE 9: MAIN PURPOSE OF VISIT

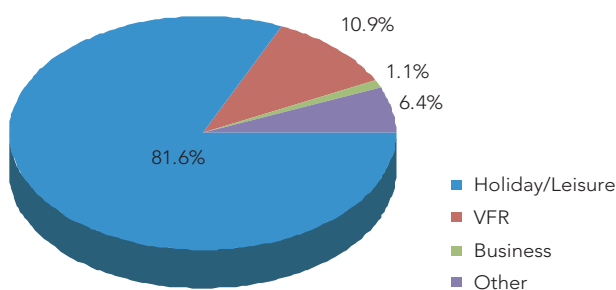


Figure 10 shows the breakdown of the holiday/leisure market only, by country of origin.

To assess the level of repeat business to the area, respondents were asked to indicate how often they visited the Dingle Peninsula. Figure 11 illustrates that just over half of those who responded were on a first visit. This compares with 65% from the 2004 County Kerry Tourism Research. Of the remaining respondents in this study, 49.2% had visited at least once before, with 17.7% on at least their second visit this year.

FIGURE 10: METHOD OF ENTRY

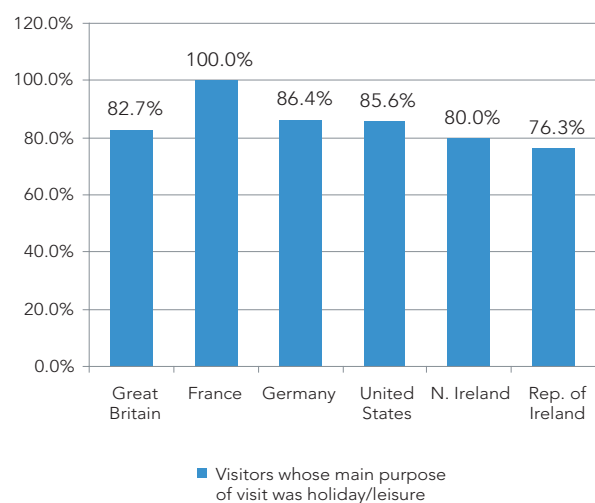
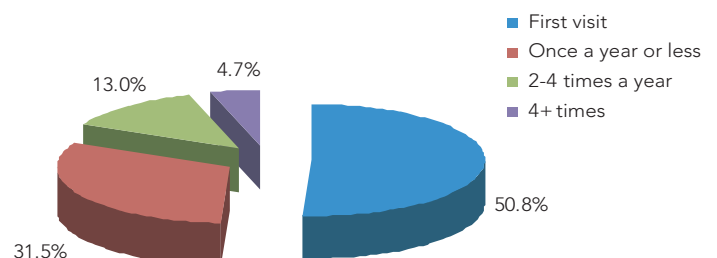


FIGURE 11: FREQUENCY OF VISITS



⁵ www.cso.ie/releasespublications/...travel/2010/overseas/travel_jun2010.pdf (accessed 10/11/'10)

⁶ Fáilte Ireland Tourism Facts 2009

Figure 12 indicates the frequency of visits by country of origin of respondents.

In terms of accessing the area, the vast majority of visitors (94.6%) had no difficulty in finding 'Dingle/An Daingean' or 'An Daingean' (as phrased in Question 7 of the English and Irish version of the survey respectively). For those that did experience some difficulty (5.4% of the overall sample), poor road signage was highlighted as the primary issue by just under 60% (of 5.4%) of respondents. Other difficulties identified were:

- ✿ Tourists not understanding the Irish language on signs (17.6%)
- ✿ The distance from the arrival airport (11.8%)
- ✿ The difficulty associated with getting a public bus (5.9%)
- ✿ Bad Maps (5.9%)

Interestingly, in the period since the 2004 research we have seen the introduction of Irish-only signs in relation to place names of Gaeltacht areas, both in these areas and on directional signs for the areas outside the Gaeltacht. This study highlights that almost 95% of visitors did not have any difficulty in finding Dingle and the change to Irish-only signs is possibly increasing awareness of the area as a Gaeltacht region.

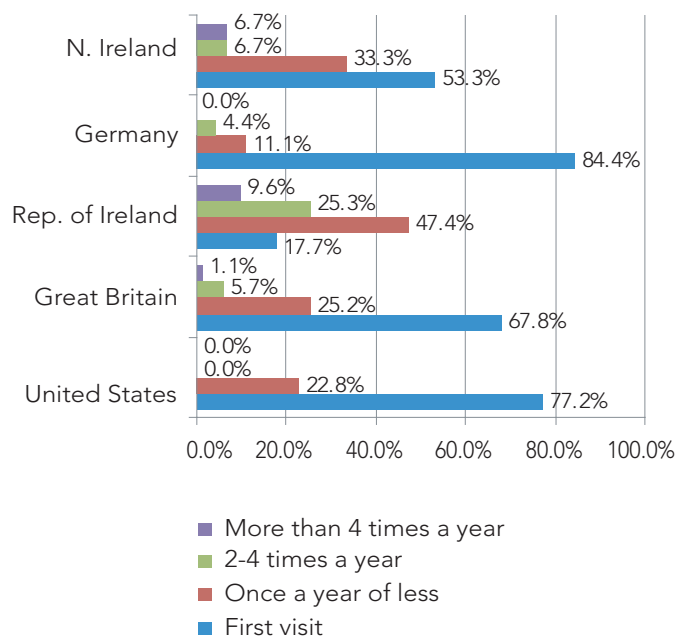
There was also a high level of awareness that respondents were visiting a Gaeltacht or Irish speaking area (81%). This is encouraging for the area and for Údarás na Gaeltachta as the agency responsible for the economic, social and cultural development of the Irish Gaeltacht regions.

The 2004 County Kerry Tourism Research points to, *"... an obvious lack of awareness and understanding amongst many of the overseas visitors to the county about the Gaeltacht regions in Kerry... Those responsible for marketing the Gaeltacht regions should consider the current levels of awareness and any actions which could be taken to increase same."*

It would appear that this has been at least partly rectified in relation to visitors to the study area in summer 2010.

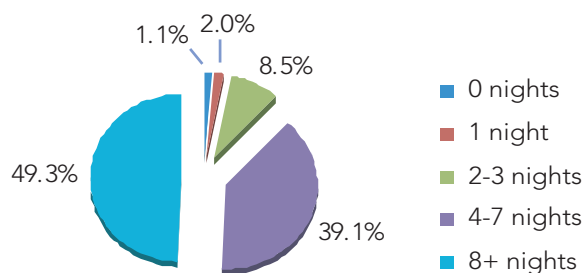
Figure 13 illustrates the duration of the International respondents' trip to Ireland on this visit with the majority (88.4%) spending at least 4 nights in the country.

FIGURE 12: FREQUENCY OF VISIT (BY COUNTRY OF ORIGIN)



This figure for repeat visits will include a percentage of repeat visits among Irish people living abroad, and a percentage of persons with a second home in the West Kerry Gaeltacht area.

FIGURE 13: NIGHTS SPENT IN IRELAND



In terms of length of stay in the area amongst respondents in this study, a 2-3 night stay on the Dingle Peninsula is the most common (31%), with another 25% staying between 4-7 nights and 12.9% staying more than 8 nights (See figure 14). These groups may include Irish people living abroad but returning home and those with second homes in the area. Overall, the average length of stay in the area was 3.3 nights.

Figure 15 examines the respondents' length of stay in the study area by country of origin. Domestic visitors (ROI) are again shown to be a crucial segment of the market, given they tend to stay longer in the area than any other market. However, it must be cautioned again that the domestic visitors figure may include respondents either returning home on holidays or staying in a second home in the area, meaning their value in terms of revenue is diminished in comparison to holidaymakers. The average length of stay for domestic visitors in the study area is 4.4 nights.

FIGURE 14: NIGHTS SPENT ON THE DINGLE PENINSULA

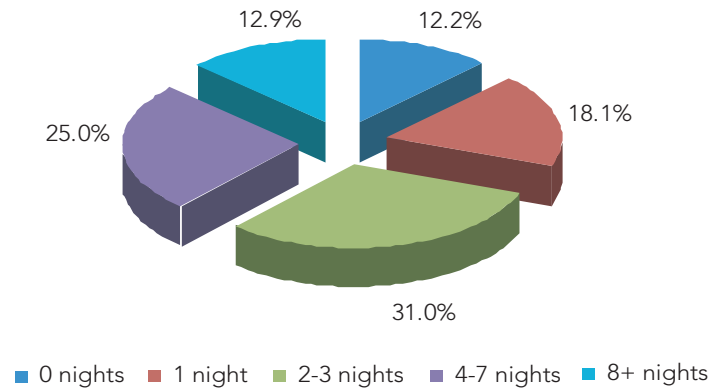
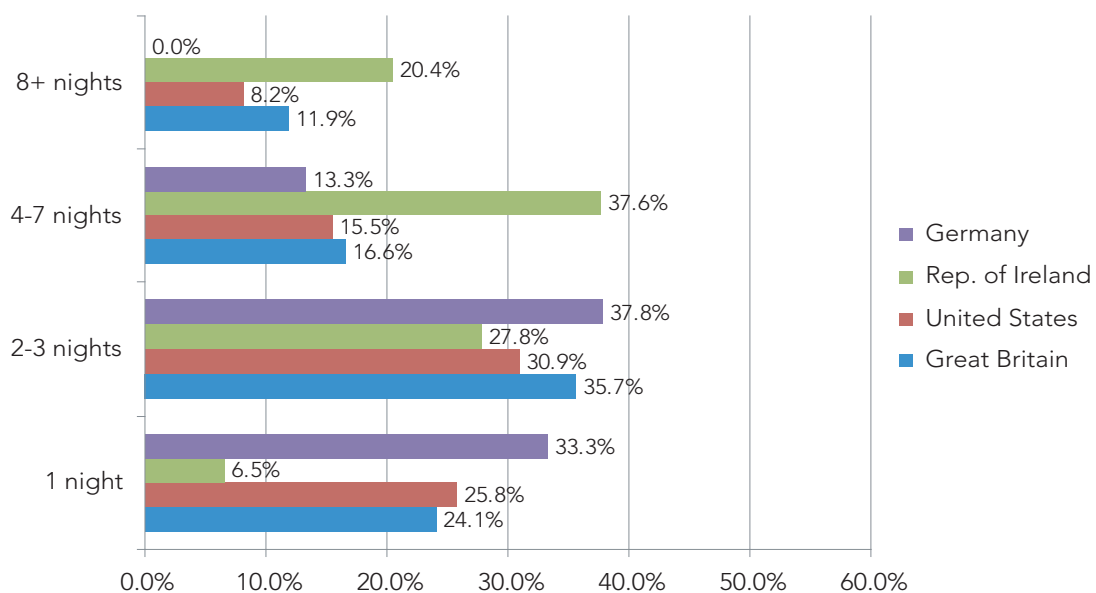


FIGURE 15: LENGTH OF STAY (BY COUNTRY OF ORIGIN)



Based on this study, visitors from Great Britain stay on average 3 nights in the area. This compares with an average length of stay in Ireland for British visitors in 2009 of 5 nights (Tourism Ireland⁷). Visitors from the USA in this survey stay on average 2.6 nights in the area, which compares with an average length of stay in Ireland in 2009 of 9.6 nights, amongst this market segment.

For those overnighing in the study area, the most popular method of reserving accommodation was directly with the accommodation provider (figure 16), either in person, on the telephone or on-line on the providers' website. The figure of 19.9% for 'Other' as indicated below reflects the number of respondents who stated that their method of accommodation booking was not covered by any of the options provided. However, as the 'Other' option is not explored further in the questionnaire, it cannot be elaborated on here.

To assess the important influencing factors on visitors' decisions to choose the study area as a holiday destination, respondents were asked to state, using yes/no options only, whether the factors listed were important or not. The percentages outlined in figure 17 relate to those who answered 'yes' for each option given.



FIGURE 16:
METHOD OF ACCOMMODATION BOOKING

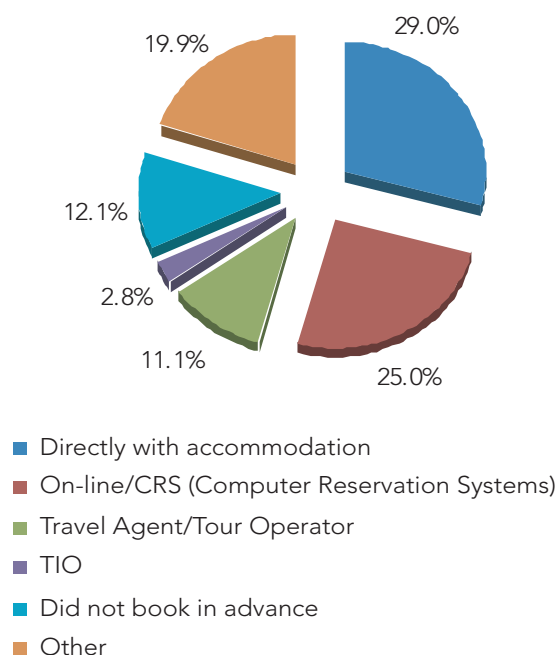
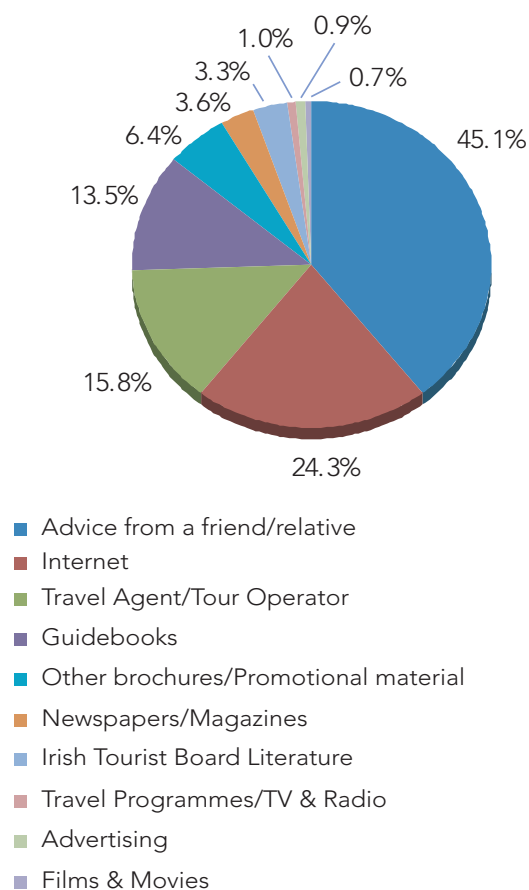


FIGURE 17: IMPORTANCE OF VARIOUS FACTORS IN CHOOSING THE AREA



⁷ Tourism Ireland Facts & Figures 2009 – Island of Ireland Overseas Visitors

Of those that indicated the Internet was important in choosing the Dingle Peninsula as a destination for their holidays (24.3%), a variety of sources were accessed, with Google as the most popular with almost 80% of respondents. All the other official promotional sites including Discover Ireland and regional sites such as Dingle-peninsula.ie accounted for the remaining 20%. It is important to consider that respondents may have linked to some of these sites from Google, but this was outside the scope of the research. Figure 18 shows the breakdown of the primary sites accessed.

FIGURE 18: INTERNET SOURCES USED

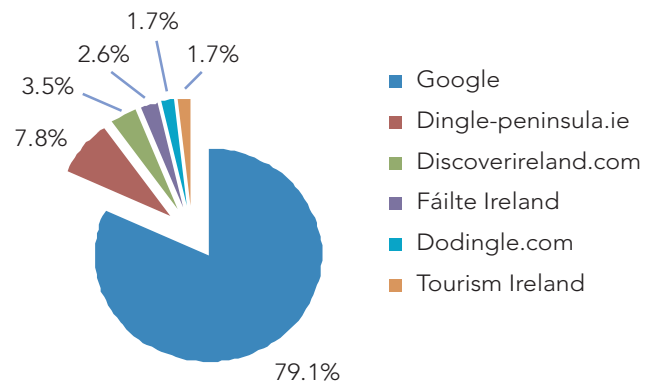
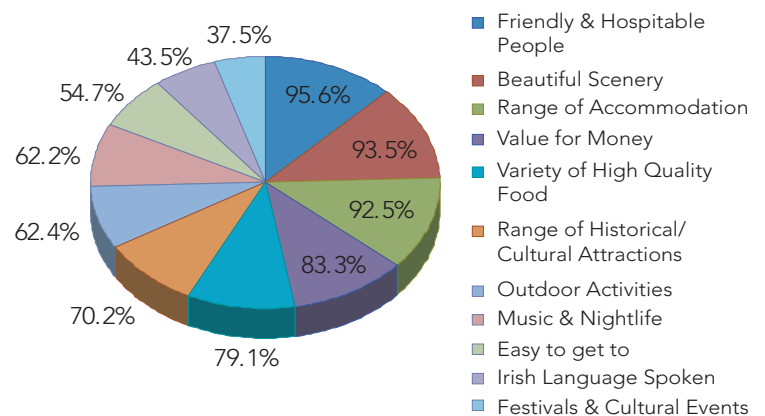


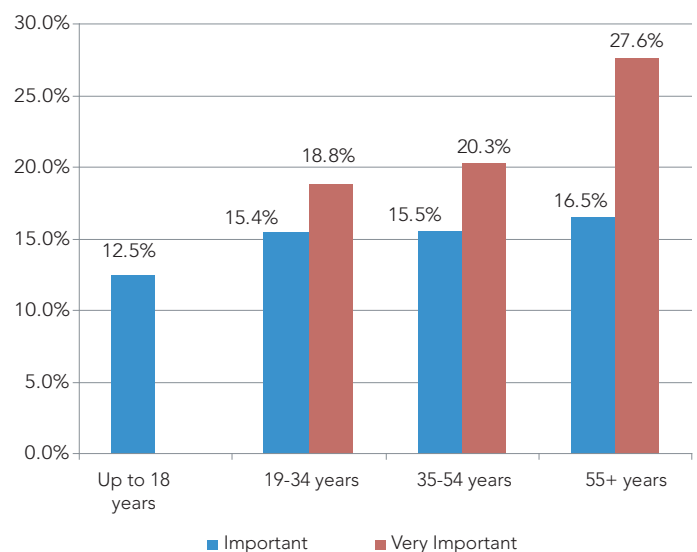
Figure 19 illustrates the results when the respondents were questioned about the factors influencing their decision to come to the study area. The total percentages outlined below are the combined totals of respondents who answered 'important' and/or 'very important'.

FIGURE 19: INFLUENCING FACTORS AFFECTING DECISION MAKING



In this survey, the category *Friendly & Hospitable People* is rated as the main influencing factor (95.6%) by respondents, followed by *Beautiful Scenery* (93.5%). This corresponds very closely to the results of the Fáilte Ireland 'Visitor Attitudes Survey' 2009 and confirms that Ireland's core values as a destination remain of critical importance to the visitor. *Range of Accommodation* and *Value for Money* are also rated as important/very important by over 80% of visitors in this survey. Of note also is the fact that 43.5% of respondents stated that 'Irish Language Spoken' was an important/or very important influencing factor affecting their decision to visit the study area.

FIGURE 20: IMPORTANCE OF FESTIVALS & CULTURAL EVENTS (BY AGE)



It is interesting to note that *Festivals & Cultural Events* was only considered important/very important by 37.5% of respondents. This figure can be at least partly explained by the fact that most of the festivals which take place in Dingle and the West Kerry Gaeltacht area happen outside of peak tourist season, and this study was conducted during the peak period of June, July and August. While festivals and cultural events are very beneficial in terms of extending the tourist season and bringing visitors to the areas in off-peak months, perhaps further consideration could be given to the development of new festival and cultural events during the summer months, to attract visitors and increase bed-nights, where there may be a gap in the market. Increasing the marketing initiatives around the existing festivals and events should also be considered.

Section Three

Profile of the Tourism Experience

The survey also evaluated the overall tourism experience across various categories and tested satisfaction ratings with basic service provision.

Figure 21 illustrates responses to the question of whether visitors intended to engage in a wide variety of activities or interests, over the course of their visit to the study area. It also details responses to a further question as to whether they had actually engaged in the activity. The figures for 'engaged in' activities or interests, is perhaps artificially low, as respondents may have just arrived in the area when they were surveyed. The West Kerry Gaeltacht offers a wide range of experiences and activities, all of which attract some percentage of visitors, although the more specialised activities have a limited niche appeal, as evidenced in figure 21. Of note also, is the fact that the 'engaged in' percentage is higher than the 'intended to engage in' figure, highlighting the fact that consumer decision making in terms of day-to-day activities and attractions is on-going and it is important that tourism providers continue their marketing efforts while visitors are holidaying in the area.

Figure 22 examines overall levels of satisfaction (satisfied or very satisfied in survey) with various activities/experiences, from the perspective of both price and quality. The results are, in the main, positive with satisfaction levels above 85% on both counts across almost all activities and experiences.

FIGURE 21: INTENDED TO/ ENGAGED IN ACTIVITIES OR INTERESTS

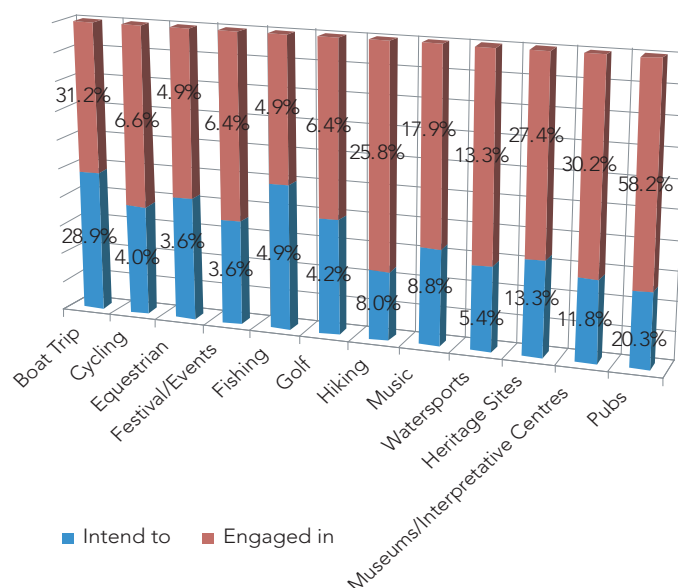


FIGURE 22: OVERALL LEVELS OF SATISFACTION WITH ACTIVITIES/EXPERIENCES – PRICE & QUALITY

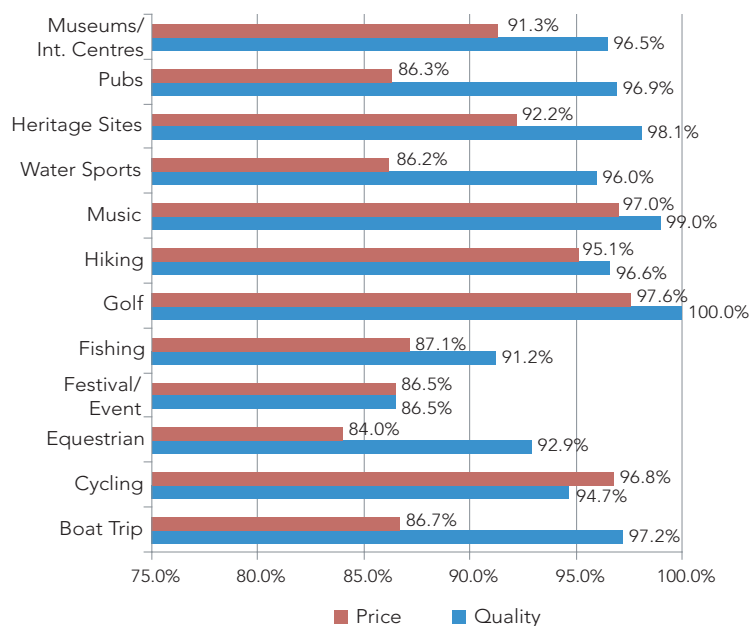


Figure 23 details the satisfaction levels with price and quality across various accommodation categories. Interestingly, the findings suggest that 'hotels/guesthouses' score highest on both counts. 'Hostels' score lowest in terms of quality and 'Rented/Self Catering' on price.

In relation to the price and quality of the food available, this study illustrates that approximately 20% of respondents were not satisfied with price in relation to the food offering in the following categories;

- ✿ budget restaurants
- ✿ pubs and bars, and
- ✿ high quality restaurants

Various reports on Irish tourism over recent years, including the most recent report of the Tourism Renewal Group (2009)⁸, have highlighted the critical importance of value for money for visitors to Ireland. The results of this survey suggest that respondents to the study area share those priorities and, in that context, the findings here in relation to the pricing issue should be a cause for some reflection for the categories mentioned.

'Hiking/Cross Country Walking' is the most important activity for tourists in Ireland overall in 2009⁹, with 830,000 tourists participating. The natural scenery and terrain of the West Kerry Gaeltacht area is very suitable for walking and hiking and respondents' satisfaction levels are extremely high, with over 95% 'satisfied/very satisfied' with the product in terms of both quality and price (see figure 25).

The recent Fáilte Ireland development plan for the Cork/Kerry Region¹⁰ identifies the importance of developing further strategically located walking routes and it is important that this is built upon in future strategies for the region.

FIGURE 23: OVERALL SATISFACTION LEVELS WITH ACCOMMODATION – PRICE & QUALITY (*SATISFIED & VERY SATISFIED)

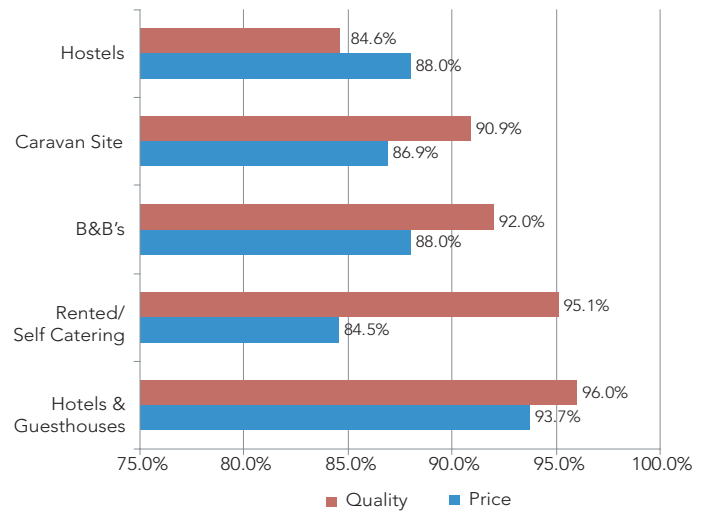


FIGURE 24: OVERALL SATISFACTION LEVELS WITH FOOD – PRICE & QUALITY (*SATISFIED & VERY SATISFIED)

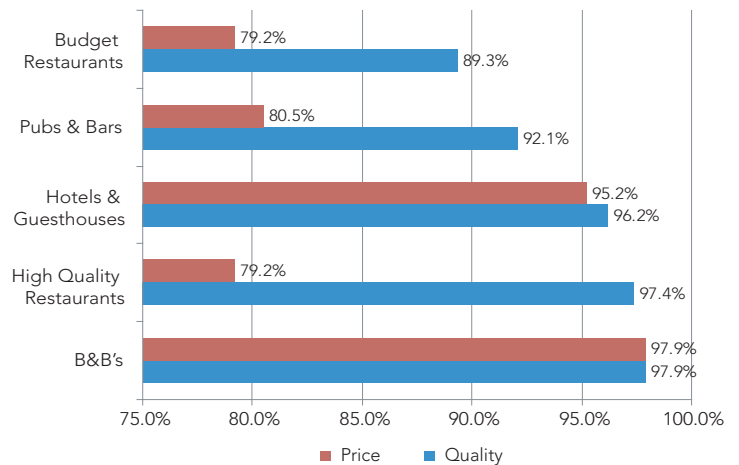
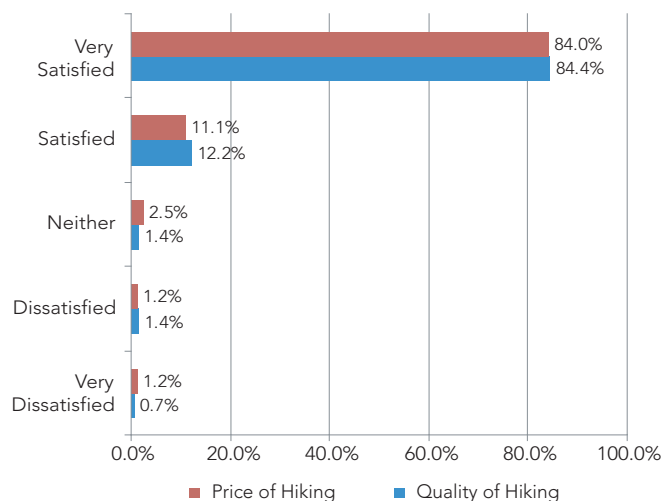


FIGURE 25: OVERALL SATISFACTION LEVELS WITH THE QUALITY AND PRICE OF HIKING/WALKING



⁸ New Horizons for Irish Tourism (Mid-Term Review) Report of the Tourism Renewal Group (2009)

⁹ Fáilte Ireland Tourism Facts 2009

¹⁰ Fáilte Ireland South West Regional Development Plan 2008-2010

Figure 26 outlines the relative importance of outdoor activities such as 'water sports', 'fishing', 'golf', 'horse-riding', 'cycling', 'hiking/cross country walking' etc.' across various age categories.

In the latter section of the questionnaire, respondents were asked whether they would or would not return to the area. The fact that such a high percentage of respondents (98.2%) said they would return, is a clear endorsement of the tourism product on offer. This compares favourably with the figure from the County Kerry Tourism Research (2004) of 95% who stated that they would visit Kerry again.

The final question in the survey sought to assess the visitors overall perception of their experience in the study area which, as revealed by the findings was very positive, in that it matched and exceeded expectations across all age categories, with the exception of the under 18 segment*.

* In this survey those respondents who were under 18 only represented 1.4% of the sample.

The concluding part of the questionnaire also contained a section that allowed respondents to comment on their experience as a visitor to the study area and/or to offer suggestions to the local tourism industry providers. Of those that did comment on their experience, the general trend was positive and there were a significant number of complimentary remarks from satisfied visitors relating largely to the quality of the scenery, tranquillity and peace of the area, the ability to hear the Irish language spoken in everyday situations and the hospitality of the resident population.

The small number of critical comments received related largely to concern over the high cost of food and dining, out as well as the problems involved in accessing some facilities for those with mobility difficulties, an issue related to the role of the County Council in the area.

FIGURE 26: IMPORTANCE OF 'GOOD OPPORTUNITIES FOR OUTDOOR ACTIVITIES' (BY AGE)

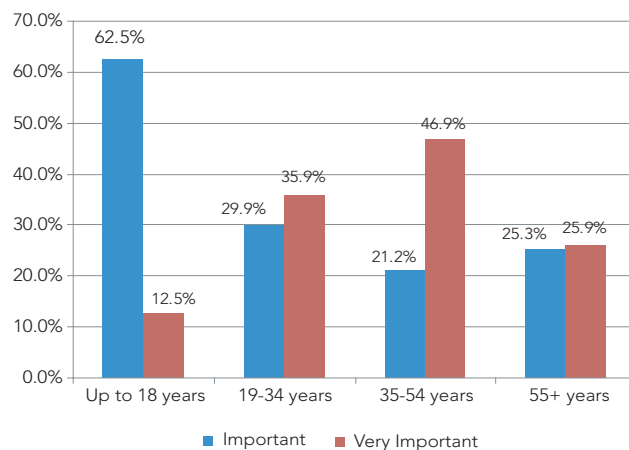


FIGURE 27: WILL YOU RETURN TO THE DINGLE PENINSULA?

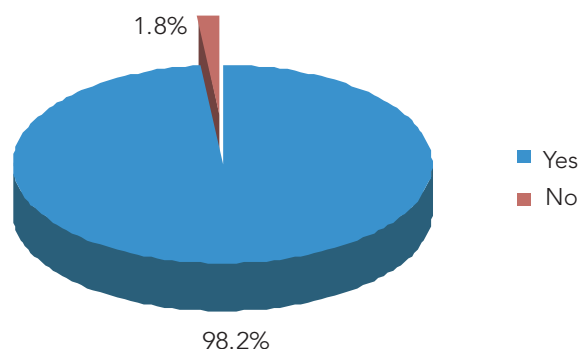
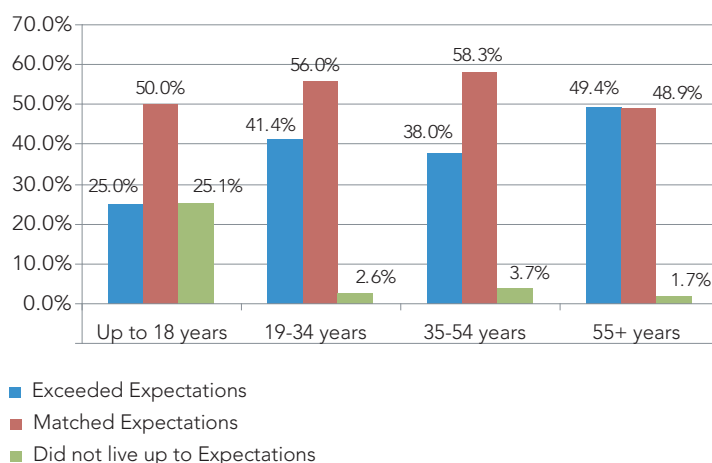


FIGURE 28: OVERALL SATISFACTION LEVELS WITH VISIT (BY AGE)



Section Four

Implications of the Research

Some points of interest extracted from the research include:

- ✦ When questioned about the factors influencing their decision to holiday in the study area, 95.6% and 93.5% identified 'Friendly and Hospitable People' and 'Beautiful Scenery' respectively as key factors. These core values of *people and place* are at the heart of the Irish tourism offering, were ranked 1st and 2nd in the 2009 Fáilte Ireland Visitor Attitudes Survey and were identified as the features that deliver higher satisfaction ratings relative to visitors' expectations.
- ✦ The high level of awareness (81%) of respondents to the fact they were in an Irish speaking region is very encouraging for the area. The 2004 County survey was critical of the '*lack of awareness and understanding*' of tourists about Gaeltacht regions. A strong and unique cultural identity is a desirable asset in the competitive tourism environment of today and unusual or distinctive features such as local language can help to differentiate tourist destinations and make experiences more memorable for their visitors.
- ✦ National tourism surveys indicate the growing influence of the Internet which is cited as the primary source of information by 48% of visitors to Ireland (in 2009) compared to 29% in 2005. Figures also suggest that 84% of overseas holidaymakers to Ireland use the Internet to book, or purchase some element of their holiday. Although not directly comparable, this study indicated that 24% of all overnighting visitors used on-line resources to book their accommodation. The figure may actually be higher as the majority of respondents (29%) booked directly with the provider, many presumably on the providers' own website. Tourists want to be able to communicate directly with their tourism providers – albeit online and it is critical that providers respond effectively by establishing an on-line profile with an interactive booking facility. The survey also highlights the opportunities that may exist for tourism providers to expand their on-line presence at a relatively low cost, perhaps by embracing social media (Facebook, Twitter, blogs etc.) as a means to communicate more effectively with a more technologically literate and enabled consumer.
- ✦ Advice from 'a friend or relative' was identified as the most important information/referral source for respondents with 45.1%. Word of mouth advertising plays a critical role in supporting the formal marketing campaigns undertaken by Fáilte Ireland and other organisations. The findings also again highlight the importance of delivering a quality experience to every visitor to encourage positive feedback and referrals to intending visitors.
- ✦ The largest international market to the study area is the U.S.A. with 17.6% of all visitors. The traditional entry point to the South West for U.S. visitors is Shannon airport, which in 2009 experienced an overall decline of 23% in transatlantic arrivals, as carriers reduced capacity due to the economic downturn¹¹. This reduction in arrivals has obvious negative implications for West Kerry, so it is imperative that the new management approach for the airport (new business model) be supported to at least maintain current transatlantic arrival levels for the present, and to develop strategies to grow that market over time.
- ✦ The market from Great Britain (comprising England, Scotland and Wales) is of primary importance to Ireland as our largest international market, contributing over 3m visitors annually and adding over €1bn to our economy¹². Current

¹¹ Shannon Airport Press Release, November 2009

¹² Fáilte Ireland Tourism Facts 2009

statistics however, indicate a significant decline in the market over the last number of years, culminating in a 15% drop in visitor numbers from Great Britain to Ireland in 2009. As the third largest market to the study area, any decline in the overall market will have serious implications for the regions tourism industry.

- ✦ Closely linked to the decline in the market from Great Britain is the perceived reduction in value for money which British visitors receive while holidaying in the Republic. In the survey of Visitor Attitudes to Ireland¹³, only 41% of British visitors stated they were very satisfied with the 'good all round value for money' of Ireland, while 32% were dissatisfied. 41% also noted the 'high cost of living' as a disadvantage to holidaying here. Figures indicate a 20% decline in the value of the euro to sterling in the last 3 years, which only compounds the problem. Although exchange rates and currency fluctuations are outside the control of the tourism industry in the study area, tourism providers must offer more competitively priced holiday experiences that give customers the quality they desire and the value for money they demand.
- ✦ Over half (50.8%) of all respondents were on a first visit to the study area, exceeding the national figure of 37%. Generating repeat business in tourism is highly desirable, as the marketing costs of attracting a repeat customer

are lower and repeat custom is an indication of customer satisfaction which could, in turn, generate positive word of mouth. The challenge for the industry is to persuade those visitors who have already experienced the West Kerry Gaeltacht to return. Supporting that task is the fact that 97.9% of respondents stated that they would return to the area again for a holiday, which is very encouraging.

- ✦ Finally, The Tourism Renewal Group Report (2009) offered three scenarios for Irish tourism over the medium term and at this point, the Worst Case Scenario (see Appendix B) looks the most realistic of the three. Given the international economic situation at the time of writing of this report, it is incumbent on all stakeholders in tourism across the study area to redouble their efforts in relation to quality, price and promotion and to work together to offer a unique tourism product.

Limitations

This analysis had the following limitations:

- ✦ The format of the questionnaire did not allow for elaboration when visitors assigned a low rating to a particular area or issue.
- ✦ As this study is related to the Gaeltacht region only, it is difficult to make direct comparisons with county, regional or national data.

¹³ Fáilte Ireland, Visitor Attitude Survey (VAS) 2009

Dingle Peninsula Tourism Survey 2010

Questionnaire

Arrival and Visitor Data

Code

1	Where do you live? (If Rep. of Ireland go to Q. 4)	Country _____ If Irish: County _____	
2	What was your method of entry into Rep. of Ireland?	Air 1 <input type="checkbox"/> Sea 2 <input type="checkbox"/> Road from N.I. 3 <input type="checkbox"/> Which Port/Airport? _____	
3	What was your main destination in Ireland? (include up to three destinations only)	1 _____ 2 _____ 3 _____	
4	What was the MAIN purpose of your visit to the Dingle Peninsula? (Single code only)	Business 1 <input type="checkbox"/> Visiting friends/relatives 2 <input type="checkbox"/> Holiday/leisure/recreation 3 <input type="checkbox"/> Other 4 <input type="checkbox"/>	
5	Which of these best describes your personal party on your visit to the Dingle Peninsula?	Alone 1 <input type="checkbox"/> Couple 2 <input type="checkbox"/> Family 3 <input type="checkbox"/> Other adult party 4 <input type="checkbox"/>	
6	How often do you visit the Dingle Peninsula?	This is my first visit 1 <input type="checkbox"/> Once a year, or less 2 <input type="checkbox"/> 2-4 times a year 3 <input type="checkbox"/> More than 4 times a year 4 <input type="checkbox"/>	
7	If First Visit ask Did you have any difficulty in finding Dingle/An Daingean? (If Yes or A Little, Ask Reason)	Yes 1 <input type="checkbox"/> A little 2 <input type="checkbox"/> No 3 <input type="checkbox"/> Reason: _____	
8	Are you aware that this area is a Gaeltacht or Irish speaking area?	Yes 1 <input type="checkbox"/> No 2 <input type="checkbox"/>	

Day/Overnight Patterns

Code

9	How many nights will you spend in Ireland? (Skip if Irish)	0 Night	1 <input type="checkbox"/>	
		1 Night	2 <input type="checkbox"/>	
		2-3 Nights	3 <input type="checkbox"/>	
		4-7 Nights	4 <input type="checkbox"/>	
		8+ Nights	5 <input type="checkbox"/>	
10	How many nights will you spend on the Dingle Peninsula?	0 Night	1 <input type="checkbox"/>	
		1 Night	2 <input type="checkbox"/>	
		2-3 Nights	3 <input type="checkbox"/>	
		4-7 Nights	4 <input type="checkbox"/>	
		8+ Nights	5 <input type="checkbox"/>	
11	If staying on the Dingle Peninsula – How did you book your accommodation? (Single colde only)	Directly with accommodation provider	1 <input type="checkbox"/>	
		On-line booking/central reservations website	2 <input type="checkbox"/>	
		Through travel agent/tour operator	3 <input type="checkbox"/>	
		Tourist Information Centre	4 <input type="checkbox"/>	
		Didn't book in advance	5 <input type="checkbox"/>	
		Other	6 <input type="checkbox"/>	

Information/Referral Source

Code

12 Which, if any, of the following were important to you in choosing the Dingle Peninsula as a destination for your holiday? Please Tick (✓) Box(es) Below		
		Q.12
		Important in Choosing
✦ Travel Agent/Tour Operator		1 <input type="checkbox"/>
✦ Irish Tourist Board literature		2 <input type="checkbox"/>
✦ Other brochures/promotional literature on Ireland		3 <input type="checkbox"/>
✦ Article(s) in newspaper(s)/magazine(s)		4 <input type="checkbox"/>
✦ Advice from friend, relative or business associate		5 <input type="checkbox"/>
✦ Guide Books		6 <input type="checkbox"/>
✦ The Internet (If ticked – specify source)		7 <input type="checkbox"/>
✦ Advertising		8 <input type="checkbox"/>
✦ Travel programme on TV or radio		9 <input type="checkbox"/>
✦ Films or movies		10 <input type="checkbox"/>
✦ Other (Please specify)		11 <input type="checkbox"/>

Influencing Factors for decision

13 BEFORE you came to the Dingle Peninsula, how important were the following in influencing your decision to come here?

On a scale of 1 to 5, where 1 is 'not at all important' and 5 is 'very important'; please rate each attribute by putting your score in the box beside the statement.

1

Not at all
Important

2

Not
Important

3

Neither

4

Important

5

Very
Important

- | | |
|---|--------------------------|
| ✦ Easy to get to | <input type="checkbox"/> |
| ✦ A range of good quality accommodation | <input type="checkbox"/> |
| ✦ Beautiful scenery | <input type="checkbox"/> |
| ✦ Friendly, hospitable people | <input type="checkbox"/> |
| ✦ Good range of historical and cultural attractions | <input type="checkbox"/> |
| ✦ Irish language still spoken in the area | <input type="checkbox"/> |
| ✦ Has good opportunities for outdoor activities such as watersports, fishing, golf, horse-riding, cycling, hiking/cross-country walking etc | <input type="checkbox"/> |
| ✦ Good all round value for money | <input type="checkbox"/> |
| ✦ A variety of high quality food | <input type="checkbox"/> |
| ✦ Festivals and cultural events | <input type="checkbox"/> |
| ✦ Good evening entertainment/music/nightlife | <input type="checkbox"/> |

Activities/Pastimes

14 Which of the following activities did you engage or intend to engage in while on holiday on the Dingle Peninsula? (See **Table 1** below)

15 And if you engaged in any of the following activities/pastimes, can you say whether you were satisfied with ...

(a) The **quality**

(b) The **price**

1	2	3	4	5
Very Dissatisfied	Dissatisfied	Neither	Satisfied	Very Satisfied

Please rate each by putting a score between 1 and 5 inside the box below
(1 = Very Dissatisfied and 5 = Very Satisfied). If Don't Know, please tick (✓) the box.

TABLE 1

	Q14a Intend to	Q.14b Engaged in	Q.15a) Satisfaction with Quality	Q.15b) Satisfaction with price
Activities/Pastimes	(Tick)	(Tick)	(Write in score 1-5)	(Write in score 1-5)
Boat Trip	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cycling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equestrian pursuits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Festival event	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fishing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Golf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hiking/cross country walking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Music Session	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Water Sports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilities Visited				
Heritage Sites/Archaeology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Museum/Interpretative Centres	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pubs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Accommodation and Food Satisfaction

16 Which of the following did you use while on holiday on the Dingle Peninsula?

See **Table 2** below

(Note for Interviewer: If not staying overnight, skip Accommodation)

17 On a scale of 1 to 5, where 1 is 'very dissatisfied' and 5 is 'very satisfied', please rate

(a) The quality on offer/customer service

(b) The price

by writing in your score in the box beside each item

1	2	3	4	5
Very Dissatisfied	Dissatisfied	Neither	Satisfied	Very Satisfied

Please rate each by putting a score between 1 and 5 inside the box below
(1 = Very Dissatisfied and 5 = Very Satisfied). If Don't Know, don't score.

TABLE 2

	16a Intend to	16b Used	Q.17a Satisfaction with Quality/Customer service	Q.17b Satisfaction with price
	(Tick)	(Tick)	(write in score 1-5)	(write in score 1-5)
Accommodation				
Hotel/Guesthouses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Accommodation (e.g. B&Bs)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rented/Self catering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Second Home/Visiting Friends or relatives (VFR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hostel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Serviced caravan/camping site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food				
Food in hotels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food in other accom (B+B)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food in high quality restaurants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food in budget restaurants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food in pubs/bars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Overall Satisfaction

Code

- 18a** Overall would you say your visit Exceeded your expectations 1 ☐
Please Tick (✓) One Box Matched your expectations 2 ☐
 Did not live up to your expectations 3 ☐

IF EXCEEDED:

18b In what way did it exceed your expectations? Write in below

IF DID NOT LIVE UP TO YOUR EXPECTATIONS:

18c In what way did it not live up to your expectations? Write in below

19 Will you return to the Dingle Peninsula? Yes 1 ☐ No 2 ☐

20 Comments

Respondent Data

Code

21	Gender	Male 1 <input type="checkbox"/>	Female 2 <input type="checkbox"/>	
22	What age bracket are you in?	Up to 18 years 1 <input type="checkbox"/>	19 – 34 years 2 <input type="checkbox"/>	
		35 – 54 years 3 <input type="checkbox"/>	55 + 4 <input type="checkbox"/>	
23	What is the occupation of the chief wage earner in your household? If retired: What was the occupation of the chief wage earner before retirement?			
	Managerial/Professional	1 <input type="checkbox"/>		
	Associate Professional & Technical:	2 <input type="checkbox"/>		
	Clerical	3 <input type="checkbox"/>		
	Craft/Manual	4 <input type="checkbox"/>		
	Other	5 <input type="checkbox"/>		

Occupation Notes

Managerial/Professional (include company/business manager, solicitor, doctor, accountant, architect, professors) –

High level of knowledge and experience and most occupations in this major group require a degree or equivalent qualification

Associate Professional & Technical: (include web designer, lab technician, medical/dental technician, journalist, taxation expert, broker, teacher, nursa garda)

Covers occupations whose main tasks require experience and knowledge of principles and practices necessary to assume operational responsibility and to give technical support to professionals.

Clerical (include secretarial and admin worker, sales, apprentices)

Craft/Manual (include mechanics, carpenters, brick layers, machine operators, farmers, fishermen)

Normally these are experts in designated trades

Other (include unemployed)

Úsáid Oifigiúil

Dáta _____ Am _____ Ionad bailithe _____ Ainm an bhailitheora _____

Síniú an bhailitheora _____

Appendix B

Adapted from 'New Horizons for Irish Tourism (Mid-Term Review) Report of the Tourism Renewal Group' (2009)

Worst Case Scenario for Irish Tourism over the Medium Term

Global and Irish Context (key points)

- ✦ Global economy grows at below trend rate in 2010-2013
- ✦ Oil prices remain volatile with frequent spikes
- ✦ Pressures cause continued reduction on worldwide air and sea routes, but particularly for Ireland as a small island – leading to a major reduction or even elimination of competition on key routes
- ✦ Financing and credit (particularly working capital) remain hard to access and expensive
- ✦ Stabilising the public finances an on-going struggle

Outcomes for Tourism

- ✦ Overseas visitor numbers continue to fall, down to 6m by 2013
- ✦ Domestic trip numbers fall steadily through 2009-2013 to just under 6m
- ✦ Domestic holiday trip numbers fall sharply to under 3m by 2013
- ✦ Sharp fall in overseas and domestic spend due to shorter trips and inflation
- ✦ By 2013, Ireland has lost market share worldwide and even within Europe.