An economic assessment of the tourism industry in the Tralee area and possible future development

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An Economic Assessment of the Tourism Industry in the Tralee Area and Possible Future Development

Patrick M. McElligott

M.B.S. 1998
An Economic Assessment of the Tourism Industry in the Tralee Area and Possible Future Development

by

Patrick M. McElligott

A Thesis
In fulfilment of
The requirements for the degree of
Master of Business Studies

Supervisor: Dr. Sean Nagle, PhD.

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August 1998
Abstract

AN ECONOMIC ASSESSMENT OF THE TOURISM INDUSTRY
IN THE TRALEE AREA
AND POSSIBLE FUTURE DEVELOPMENT

by Patrick M. McElligott

This study has been carried out at a time when Tralee is trying to develop a viable tourism industry and aims at analysing the impact of this process. It studies Tralee's transition over the last decade from being a commercial town to becoming a recognised tourist destination. The present state of the local tourism product is portrayed and future courses of action suggested. This analysis is conducted utilising the views of tourists, tourism operators in the town and current industry thinking. Relevant literature is examined and questionnaire surveys of tourists and accommodation providers were administered and their results investigated. A focus group discussion involving tourism suppliers, state bodies and others with a vested interest in tourism is recorded and studied.

International trends in the tourism industry and the Irish Government's policies are examined to better understand the external pressures that have a bearing on Tralee's tourism evolution.

The study establishes that tourism providers in the area with a narrow focus, whether private or public, need to identify their niche through market segmentation and targeting, and supply the niche with a quality tourism product that does not compromise the town's greatest asset, its cultural, social and economic environment. This would help secure the locality's long term economic viability.

In a broader sense there is a need for a clearer and more practical understanding of sustainability among local tourism providers along with an inherent acceptance and implementation of the marketing concept. Realisation of the emerging implications and benefits of partnership and communitarianism in terms of pedagogy, politics and scale has been slow to take root. Specific product determinants such as quality and seasonality have assumed greater importance in recent times but the potential of others such as market segmentation and special interest tourism has yet to achieve appropriate recognition.
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Finally, special words of thanks to my wife Mary for her support, encouragement and patience.
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Chapter 1

Introduction

Tourism is receiving greater recognition as an economic activity at international, national and local levels. It is therefore important to understand recent developments and how they will impact on general tourism practice, especially at local level.

While tourism is generally referred to as the world's 'largest industry', it is not easily defined given its many dimensions both on the demand and the supply side.

One of the most widely accepted definitions of tourism was set out by the World Tourism Organisation (WTO) in 1993 and states:

'Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.'

If this definition is teased out it highlights the fact that visitor activity is outside the routine, and therefore away from the routine location, for a length of time that is less than one year. It includes day trips, and so does not necessitate overnight stays. It is not restricted to leisure and can include travel for any other purpose once it is non-routine. It has to include travel but of course not all travel is tourism. Likewise, while much of it takes place during recreational periods, most recreational activities do not involve tourism since they are part of the person's routine. The focus in tourism is on places and activities, since tourists go somewhere to do something. Tourism involves temporary movement, and although it can be for periods of up to one year, about 90% of it is for less than two weeks.\(^1\) It is interesting to note one of the definitions that

\(^1\) *Travel & Tourism's Economic Perspective*, 1995, World Travel & Tourism Council, London.

Bord Failte has for tourists, which it attributes to the WTO, describes tourists as foreign travellers staying in the country for one or more nights. ³

Tourism is characterised by the input of many diverse and fragmented activities. However, it can be seen as an industry in itself. To quote Gilbert⁴:

“Tourism while having no clear boundary delineations or concise conceptual clarification does, due to the overall size and impact of spatial and temporal movements of people with varying service needs for shelter, sustenance, entertainment and travel, produce the basis of an industry.”

Throughout this study the phrase 'tourism industry' is employed in a broad sense representing the variety of services and resources which are utilised by tourists.

Over the last decade Tralee has been undergoing a transition from being a commercial town to becoming a recognised tourist destination. This has happened by design and not by chance. The object of this study is to describe the present state of tourism in the Tralee area and assess the developments that have occurred. The different elements of the current composition of tourism in Tralee are analysed, specifically those which have most effect on the long term economic viability of Tralee's tourism product. The views of tourists and local tourism interests are combined with recent industry opinions and trends to highlight the steps that are now necessary to ensure that tourism in Tralee evolves in a way which leads to the betterment of the whole community, and thereby improves the tourism product itself. Ultimately what is required is the achievement of the optimum harmony between tourists, tourism interests, the local community, the physical environment and the area's cultural attributes, which in turn maximises economic feasibility.

The next chapter, Chapter 2, examines the data relating to the present performance of the tourism industry in the late 1990's at global, European, national, regional and county levels. From this it is possible to identify trends in the market which can have significant repercussions for the industry at local level in Tralee.

The Irish Government's economic imperatives are analysed in Chapter 3, particularly those pertaining to the last decade. Through this issues which are central to tourism growth in the country are clarified and help in informing the future direction of tourism development. It is important that local tourism developments dovetail with Government policy so that they complement each other.

An overview of the economic and demographic profile of Tralee is set out in Chapter 4 taking into account its population, educational attainment, employment in the area and access to the town.

The quantitative and qualitative research methodologies that were employed in carrying out the study are described in Chapter 5, along with their strengths and weaknesses. A rationale for the inclusion of the different methods is presented and their administration and accomplishment in this study is analysed.

Chapter 6 focuses on the current tourism profile of the Tralee area by reviewing the organisations involved and the tourism product that is on offer. In particular, the chapter includes an analysis of information gathered by questionnaire survey from accommodation providers in the town in which the objective was to achieve blanket coverage of hotels, guest houses and hostels in the area. It also includes the findings of a questionnaire survey of tourists visiting the town. These questionnaires are contained in the Appendices A, B and C.
The development progression of tourism in Tralee is assessed in Chapter 7. This section was informed in large part by the findings of a focus group discussion of tourism interests in the town. It looks at current development and associated problems that need to be tackled. The chapter also highlights ways in which the local tourism product needs to be shaped by global changes in the industry and the need to incorporate a sustainable approach to tourism.

The final chapter, Chapter 8, looks at marketing which can prove to be the most powerful tool that the local tourism industry has in shaping its own future. The opinions of visitors are gleaned from the questionnaire survey to enable the local tourism providers to empathise with the visitors and thereby improve the tourism product that is on offer. The views of the tourism suppliers themselves is examined to identify what they believe is necessary to further develop their industry. The tourist survey is investigated and highlights traits that differentiate Tralee's main tourist markets. This provides the basis for market segmentation and the development of suitable products for the various markets. Finally, after considering the main issues in the local tourism industry from a marketing perspective, conclusions are drawn and recommendations are made with two priorities in mind. One consists of the measures that are required for Tralee to succeed in its metamorphosis from commercial town to tourist destination and the other is the town's long term economic viability in its adoption of tourism as the optimum way forward.
Chapter 2

Tourism in the late 1990's.

2.1 World:

2.1.1 Global Population:
Exponential population growth has seen a jump from a world population of 2.5 billion in 1950 to 5 billion in 1990. If present trends continue it is expected that the global population in the year 2030 will be in the region of 10 to 12 billion.

2.1.2 A Growing Tourism Industry:

<table>
<thead>
<tr>
<th>Years</th>
<th>International</th>
<th>Index of growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>1950</td>
<td>25.3</td>
<td>-</td>
</tr>
<tr>
<td>1960</td>
<td>69.3</td>
<td>274</td>
</tr>
<tr>
<td>1970</td>
<td>165.8</td>
<td>239</td>
</tr>
<tr>
<td>1980</td>
<td>286.3</td>
<td>173</td>
</tr>
<tr>
<td>1990</td>
<td>459.2</td>
<td>160</td>
</tr>
<tr>
<td>2000 (p)</td>
<td>661.0</td>
<td>144</td>
</tr>
<tr>
<td>2010 (p)</td>
<td>937.0</td>
<td>141</td>
</tr>
</tbody>
</table>

p = projection

Source: World Tourism Organisation, *Compendium of Tourism Statistics*, supplied over the years to WTO (and projected).

From Table 2.1 it can be seen that international tourist arrivals have gone from being about 25 million in 1950 to around 600 million in 1998, and is still increasing.

However, the rate of increase is expected to decline. In Europe the annual increase was of the order of 3.3% in the early 1990's, 3.2% is expected in the late 1990's, and 2.5% is the projection for the first decade of the new millennium.\(^6\) Although there will be fluctuations due to energy or economic crises, or political events, it is estimated that the global growth of international tourism will be 3 to 4% annually up to the year 2010.

### 2.1.3 Regional Share of Tourism Arrivals:

The WTO also provides statistics on the world regional shares of international tourism arrivals. While the Americas are not expected to change more than one percentile from 1980 to 2010 with 20% of the market, East Asia and the Pacific are expected to more than treble from 7% to 23%, but the European share is projected to decline from 66% to 50% over the same period.

### 2.1.4 Economic Statistics:

The World Travel and Tourism Council (WTTC) estimated that in 1995 tourism accounted for:

- 10.9% of world total Gross Domestic Product (GDP);
- 10.7% of the global workforce;
- 11.4% of global capital expenditure;
- 11.1% of total corporate and personal taxes paid; and
- 12.6% of global export earnings.

(Source: WTTC, 1995)

These estimates are about double the traditional percentages since they are based on satellite accounting procedures and also include domestic travel, day trips, and capital expenditure on tourism related infrastructure such as airports. The total value of goods and services attributable to tourism in 1996 was 10.6% of gross global product or, in money terms, over IR£2.5 trillion, and it provided employment for 255mn. people.\(^7\)

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\(^7\) The Economist, 1998, *Travel and Tourism*, a Survey by Mark Roberts, January 10th - 16th.
2.1.5 Recent Global Trends:

There are many trends emerging that influence the tourism product and how it is marketed.\(^8\) These include:

- The breaking down of political barriers. It is evident that tourism will thrive where politics permits it. The annual number of visitors to South Africa more than trebled from 1990 to 1996. This bodes well for Ireland with its recent Peace Agreement.

- In Europe and America demography suggests that the numbers of tourists will show little increase over the next few decades but since many of the travellers will be in retirement, then they will have more time available to them.

- More and more hotels are coming together to ensure a consistency in standards no matter where they are located. The success of this form of branding has lead to three-quarters of all American hotels being part of a chain. It is also proving useful in the compilation of databases for marketing purposes.

- Travel agents are being replaced by information technology and the Internet where the travellers are booking directly with the airlines. The Internet was the medium for almost IR£600mn. in ticket sales in 1997 and this is forecast to increase more than ten-fold over the next five years. As a result the airlines are dropping the percentage commission that they pay to the travel agents. Therefore the agent needs to either sell more tickets or charge consultancy fees for advice on customised trips.

- Tourist destinations are consumer products in competition with each other but also with products such as cars and jewellery. Like most consumer products it has improved in quality, value and choice as the industry has matured and become more efficient.

- As with the hotels, airlines are also forming global alliances in the hope of achieving economies of scale, e.g., American and British Airways, United and

---

Lufthansa. They are linking servicing, landing slots, reservations, training and customer information.

- Computer modelling has lead to more accurate predictions by airlines of the demand for last minute full-fare tickets. As a result their load factor (average occupancy) has increased. For instance, American airlines have raised their load factor from 64% in 1990 to 70% in 1997. This serves to make the airlines more efficient and so they can charge lower fares.

- The environment is the fastest-growing sector of tourism and ecotourism has become a tag that is desired by tourists and tourist destinations alike. Three main criteria for ecotourism have become widely adopted in environmentally challenged destinations\(^9\). Tourism operations have to follow green principles, the tourists undergo a learning experience as opposed to "peering into the fishbowl", and a reasonable share of the revenue generated by the tourist's sojourn has to be imparted to the local people and the conservation of the area's environment.

2.2 Europe:

The northern part of Europe has benefited more from international tourism than anywhere else in the world over the last century. As a result it has had a huge influence in the shaping of the whole industry. However, tourists in the area, which make up over 80% of visitors to Tralee\(^10\), are seen as a mature market with the people that wish to travel already doing so, and therefore the main growth area in this market is to increase the frequency of their travel.

Domestic tourism in many north European countries revolved around traditional or cold-water sea-side resorts, and due to a decline in their popularity in favour of south European or other sunshine resorts, the last thirty years has shown a decline in

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\(^9\)Originally set out in a report on sustainable tourism prepared for the Bahamian Government by James MacGregor through his environmental consultancy firm, ecoplan:net.

\(^10\)Survey of Tourists in Tralee, 1997, (in relation to this study).
domestic tourism. However, an important growth area has been special interest activities such as nature, culture and heritage. These are seen as one area because, from a tourist's point of view, many of them overlap and belong in the one melting pot. The European Commission recognised the importance of cultural tourism when in 1990 it was designated a key area for development.

It should be noted that many European cities such as London, Paris, Vienna, and Salzburg have made tourism a major element of their economies, as have industrial cities like Leeds and Glasgow. Therefore, though the market in this segment is growing, Tralee needs to emphasise the rural, given its close proximity to the Killarney National Park and Slea Head. Urban tourism is very competitive and will be even more so in the future.

2.3 Ireland:

Between 1966 and 1986 the Irish tourism sector was at a standstill but from 1986 to 1996 has increased by 158% in terms of the total number of overseas tourists.

2.3.1 Domestic Tourism:

To get a better picture of tourism in Ireland it is not sufficient to use statistics developed within the country since they are weak in the area of domestic tourism and same-day visits from home. In 1993 the European Travel Commission carried out an analysis on evidence drawn from 18 European countries which found that domestic tourism visits outweighed international ones by just over 3.5 : 1. In Britain the ratio was found to be 4 : 1. If the British ratio was applied to Ireland, then roughly 80% of all tourism visits in the country are made by Irish residents. However, according to the Central Statistics Office figures in a Bord Failte publication the Irish ratio was about 2 : 1 in 1993 and had fallen to 1.2 : 1 by 1996 due to a 19% drop in domestic trips and a 36% increase in out-of-state visits over that period.

2.3.2 European Origin:
In the last 10 years there has been an upsurge in the number of European visitors to Ireland, especially in the earlier years. This may be the result of cheaper access fares, the loss of interest in sun destinations, Ireland's environmentally attractive location or more effective marketing. In recent years the rate of growth in this market has declined.

2.3.3 Peripherality:
Peripheral disadvantage has regularly been put forward as significantly undermining Irish competitiveness. Ireland's location as an island in the top, left-hand corner of Europe leads to the assumption of high access costs. This is a potentially defeatist attitude to what is seen as a diminishing barrier to economic development. Recent research\(^\text{12}\) has highlighted that the segmentation of Ireland's markets (due to 'The Troubles') and a lack of demanding, sophisticated customers are more restrictive to the country's economic development than actual location. It was excellently summarised by one commentator\(^\text{13}\) who said "peripherality is a very significant state of mind and an insignificant geographical fact." Therefore it is no longer seen as an untreatable affliction. Instead it helps to clarify weaknesses in areas such as 'human capital' leading to appropriate locally based action.\(^\text{14}\) This new approach to peripherality has been taken on board by the European Commission and is resulting in broader and more effective economic policy actions.

2.3.4 Tourism Revenue:
A study into the contribution of tourism to Government revenue has highlighted that while it stood at 8.1% in 1990, it had increased to 10.8% by 1995.\(^\text{15}\) This means that


\(^{13}\)Comment made by Gerry Lowe, managing director of Lowe Refrigeration.


while the economy was expanding rapidly during these years, tourism's contribution to the growth was well above the average of all sectors. It is often stated that tourism is not an industry since it is so fragmented and cannot be clearly defined. The other side of this coin is that as a result of this vagueness its importance is under-rated in sectors such as agriculture, retail and distribution, food and drinks, internal transport, arts and crafts, personal services and entertainment. These factors and others such as induced revenue and spending due to Government interaction have been included in the derivation of the above percentages.

In 1996 foreign exchange earnings from tourism amounted to 7% of all exports. This is because the 4.7 million overseas visitors to the country in 1996 provided IR£1.45 billion in foreign exchange revenue.

Figure 2.1
Origin of Tourism Revenue 1993-1996

Source: Bord Failte.

Figure 2.1 shows that North America and Britain has the biggest rate of increase over the four years. Revenue from Northern Ireland rose from IR£69mn. in 1993 to
IR£85mn. in 1996, and spending on Domestic Trips decreased from an estimated IR£621mn. to IR£579mn. Preliminary results for 1997\textsuperscript{16} indicate that tourism revenue derived from Britain and North America continued to grow but that Mainland Europe showed a decrease. However, the Domestic spending is expected to have increased by 16% over the 1996 figure.

2.3.5 Origin of Tourists:

Table 2.2 demonstrates that the North American market (of which the U.S. is approximately 90%) has experienced tremendous growth in recent years having passed through a period of slow progress. In 1996 half of the visitors from mainland Europe were from Germany (28%) and France (22%). Another 10% were from Italy.

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Britain</td>
<td>1,857</td>
<td>2,038</td>
<td>2,285</td>
<td>2,590</td>
<td>2,857</td>
<td>+40</td>
</tr>
<tr>
<td>Mainland Europe</td>
<td>945</td>
<td>988</td>
<td>1,101</td>
<td>1,177</td>
<td>1,170</td>
<td>+25</td>
</tr>
<tr>
<td>North America</td>
<td>422</td>
<td>494</td>
<td>641</td>
<td>729</td>
<td>777</td>
<td>+73</td>
</tr>
<tr>
<td>Other Overseas</td>
<td>124</td>
<td>159</td>
<td>204</td>
<td>186</td>
<td>213</td>
<td>+50</td>
</tr>
<tr>
<td>Total Overseas</td>
<td>3,348</td>
<td>3,679</td>
<td>4,231</td>
<td>4,682</td>
<td>5,017</td>
<td>+40</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>540</td>
<td>630</td>
<td>590</td>
<td>600</td>
<td></td>
<td>+11</td>
</tr>
<tr>
<td>Total Out-of-state</td>
<td>3,888</td>
<td>4,309</td>
<td>4,821</td>
<td>5,282</td>
<td></td>
<td>+36</td>
</tr>
</tbody>
</table>

Source: Bord Failte and Central Statistics Office (CSO), P = preliminary.

In 1997 Germany dropped to 26% and there was also a one percent drop in the French proportion. The domestic market is on the decrease, which has serious ramifications for Tralee since it is highly dependent on the home market.

2.3.6 Average Spending:

Marrying the information on origin of tourists' revenue to the information on origin of tourists it is possible to get an overview of the trend in average spending.

Mainland Europe is not a homogenous market, and this is especially true in terms of average spending. For instance, when looking at Ireland's three major continental markets, the biggest spenders are the Italians at IR£450 per person. The Germans average IR£439 and the French IR£336. The preliminary results for 1997 show that the average spending of all overseas visitors has risen by IR£5 to IR£315 which is an increased rate of growth on the average annual rate for the previous three years, but it is still lagging behind the rate of increase in inflation.

<table>
<thead>
<tr>
<th>Origin</th>
<th>1993 Nominal</th>
<th>1996 Nominal</th>
<th>% change</th>
<th>1996 Real</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Britain</td>
<td>202</td>
<td>222</td>
<td>+9.7</td>
<td>208</td>
<td>+2.8</td>
</tr>
<tr>
<td>Mainland Europe</td>
<td>425</td>
<td>396</td>
<td>-6.7</td>
<td>371</td>
<td>-12.6</td>
</tr>
<tr>
<td>North America</td>
<td>432</td>
<td>434</td>
<td>+0.6</td>
<td>407</td>
<td>-5.7</td>
</tr>
<tr>
<td>Other Overseas</td>
<td>441</td>
<td>504</td>
<td>+14.3</td>
<td>472</td>
<td>+7.1</td>
</tr>
<tr>
<td>Total Overseas</td>
<td>303</td>
<td>310</td>
<td>+2.4</td>
<td>290</td>
<td>-4.1</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>128</td>
<td>142</td>
<td>+10.9</td>
<td>133</td>
<td>+3.8</td>
</tr>
<tr>
<td>Domestic Trips</td>
<td>81</td>
<td>94</td>
<td>+15.8</td>
<td>88</td>
<td>+8.4</td>
</tr>
</tbody>
</table>

Note: Assuming 1993 = 100.0 as the base year, price index for 1996 = 106.8.
Average Spending has been rounded to the nearest pound.
In Table 2.3 it can be seen that the total average spending from overseas has decreased by 4% in real terms from 1993 to 1996. The numbers from overseas have increased by 40% over the same period so where is the problem? To highlight the importance of changes in the average spend take a hotel for example. The average Irish hotel room has a profit before tax of about 9.6%. It is unlikely that it would be in a position to lessen its costs without having a knock-on effect on quality so the 4% drop in customer spending comes out of profit. With an 5.6% (9.6 - 4) profit margin now the hotel would need a 72% increase in its turnover to cancel the drop in profit margin (9.6% x 100 is the same as 5.6% x 172). This 72% increase in tourist turnover, which would be needed for the hotel to make the same profit as previously, is more than the 40% increase in tourist traffic that was actually experienced over the same period. Therefore in real terms the hotel's profit is lower even though it may be doing a much higher level of business. This is a basic example and there are many other factors involved (e.g., the extra employment due to the higher numbers, the resulting extra revenue paid to the Government, the extra food and drink that has to be supplied, and the extra administration in terms of stationery and technology - the list could be endless due to the multiplier effect) but its simplicity is useful in clarifying this particular aspect of average spending and if a hotelier's profits are dropping it is likely that quality will ultimately suffer.

2.3.7 Employment:

From 1988 to 1996 employment in tourism had increased by over 40,000 or 60%. Tourism accounted for one in every twelve jobs in the country in 1996 and it has been pointed out that by the year 2000 tourism will replace the agricultural sector as the main industrial employer in Ireland. Economists have identified four categories of tourism-induced employment. First there is direct employment, for example, in hotels, restaurants, and car rental. Secondly indirect employment is created in areas like

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17 Source: Horwath Bastow Charleton, where it is confirmed that the average Irish hotel room has an annual turnover of IR£28,000 and a pre-tax profit of IR£2,700.

personal services and in companies that supply products to the hotels and restaurants. The spending of earnings from tourism on Irish goods and services is then generating further employment and finally if the Government decides to spend the extra taxes that it collects from tourism on job schemes or public works, then the employment potential is even further augmented. On this last point it is significant that the Government collected IR£1.1 billion from tourism in 1995, about one-twelfth of all tax revenue, and that out of every pound that the tourist spends, the exchequer gets an average of 57p through either direct or indirect taxes. When Henry took the four categories of employment into account the 1995 contribution of tourism to total employment was calculated at 9.5% in terms of full-time job equivalents. This may disguise the fact that a much larger number gain part of their income from tourism.

2.3.8 Access:

There has been a major change in the mode of travel used by tourists to access the country. In 1995 59% of holiday visitors arrived by air, as opposed to 50% just two years earlier in 1993. This swing in favour of air was evident in all markets. A figure for 1997 which is available shows that roughly 72% of all passenger travel into Irish ports was by air, and the remaining 28% was by sea, which suggests that the trend is continuing. In fact the figures for the first four months of 1998 show the ratio to have become 78:22. In the situation that has presented itself Ireland is fortunate in having one of the highest number of airports per head of population in the world.

2.3.9 Seasonality:

From 1993 to 1995 the share of tourists clustered into the peak months of July and August remained unchanged at 36%. Then in the following two years there was

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success in bringing this down to 30% of the overall visitors, and the target set by the Government is to further reduce this percentage to 25%. The shoulder period of May, June, September and October is expanding but it is proving very difficult to increase the level of tourism business in the off-peak six months November to April. In fact the off-peak share of tourists fell from 24% in 1993 to 20% in 1995.

2.3.10 Purpose of Visit:

Figure 2.2 shows that holidays are the main motive behind tourists' coming to Ireland but its importance varies significantly by market area. It is the motive for almost two-thirds of North American visitors, half of the continentals and less than a third of the British. Both the visiting of friends and relatives and business reasons are most significant for the British, while the 'other' category, including study and personal, is the motive for almost one in five of the mainland European visits.

Figure 2.2

Purpose of Visit by Origin of Visitor to Ireland, 1995.

Source: Bord Failte.
2.3.11 Investment in Accommodation:

Figure 2.3 shows the trend in the number of rooms and beds in the hotel and guest house sector over 15 years. The decline of the early 1980s was reversed and over the last decade the stock of rooms and beds has been steadily increasing. In all categories there was a total of 81,000 rooms available in 1995\(^\text{22}\). In that year alone 35 new hotels opened their doors. A report that was produced by NCB Stockbrokers\(^\text{23}\) into the hotel sector highlights that an additional 85 hotels are expected to come on stream in the Dublin area over the three years up to 1999.

In the early 1980s there was little confidence evident from the banks in relation to the tourism sector. This has changed dramatically and all of the major banks operate tourism investment programmes, such as the Allied Irish Bank's IR£100mn. in the hotel and guest house sector in conjunction with the Irish Hotels Confederation and Ernst & Young\(^\text{24}\). In total, the four major banks lent IR£52mn. to tourism related projects in the 1994/5 financial year.

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Figure 2.3

No. of Rooms and Beds in Hotels and Guest Houses in Ireland, 1980 - 1995.

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\(^{23}\)NCB Stockbrokers, 1996, Outlook for Jurys and Ryans Hotels, Dublin.

\(^{24}\)see Note 21.
2.4 Mid-West Region:

2.4.1 Change of Organisation:
Until 1988 Tralee and North Kerry was in the South-west region. Then the Mid-west Regional Tourism Organisation (RTO) was abolished and its functions were transferred to Shannon Development and the Mid-west region was extended to include North Kerry. The RTOs were initially set up to establish partnerships between Bord Failte, local authorities and industry representatives in each region. Therefore when North Kerry joined the Shannon Development's Mid-west region the industry link in terms of representation on the board was broken, and the contribution from the local authority was fore-gone. A regional tourism consultative forum was set up but it had no more than an advisory role, and its relevance has been questioned by industry representatives.

2.4.2 Loss of Market Share:
During the years 1989-1994 the annual average growth in real overseas revenue for Ireland was 7.3%. However, in the Mid-west it averaged at 2.4% - less than a third of the national figure.\(^{25}\) In fact, this relative loss of market share has been evident since 1981. In 1995 the number of holiday bednights spent in the region was approximately 2,386,000 and this is relatively unchanged from two years earlier. However, over the two years the country as a whole experienced a growth of 11% in bednights. Again the stagnation highlights a loss in market share, which was attributable to the British and U.S. markets in particular, and is not attributable to any particular period of the year.

2.4.3 Regional Distribution of Income:
One of the main reasons that the government gives for the support of tourism is the expectation that tourism will help in the regional distribution of income within the

country but this does not necessarily hold true. It depends very much on the tourist and the tourism product. There is a danger that the regions along the western seaboard have again become complacent and are failing to recognise the trends that are occurring. The modern-day tourist wants variety, an activity focus and value-for-money. Beautiful scenery is a wonderful asset to have, but on its own it is insufficient. It has to be part of an overall package that is dovetailed to the niche of the tourist market in question.

Hannigan\(^{26}\) has pointed out that apart from the South-west region, which gains considerably from tourism, if the present trends continue in terms of tourism incomes and investment, then the more developed regions will gain the most and this will only exacerbate the uneven distribution of regional income. Another aspect of the problem is that regions such as the Mid-west are unable to attract their share of manufacturing industry. Tourism is not a cure-all and has a limit in its affinity to clear up the region's economic problems.

2.4.4 Bord Failte Regional Survey, 1995:

In carrying out this survey Bord Failte found that of the 836,000 overseas visitors to the region in that year, 34% were British, 33% European, and 27% North American.\(^{27}\) Seven in ten were on holiday, one in ten on business and another 14% visiting friends and relatives. 35% of them arrived in the peak months of July and August, which was very close to the national average of 36%. 30% arrived into the country by sea and the remainder by air. Overseas tourists to the region were shown to spend most of their time in other regions. About two-thirds of Europeans and North Americans were visiting for the first time, but this is the case for just over a quarter of the British. 28% of overseas tourists were travelling alone. The total number of paid serviced approved rooms in the region increased from 5,112 in 1991 to 6,548 in 1995, an increase of 28% over the period.

\(^{26}\)Hannigan, K., 1994, A Regional Analysis of Tourism Growth in Ireland, *Regional Studies.*

2.4.5 Shannon Stopover:

It has been argued in recent times that the removal of the compulsory Shannon stopover for all transatlantic flights in 1993 has led to a decline in tourism in the region. A report which has been compiled by business interests in the Mid-west region and published in May 1998 has highlighted the fact that traffic through Shannon airport has increased by 9.6% since 1993, while there has been a 76% increase in Dublin's traffic over the same period. While the removal of the compulsory stopover is one possible reason for the decline, there are several others that have had a definite impact on the numbers of tourists coming into the region.

- Tourist products which were deemed to be innovative twenty-five years ago and based upon the beautiful scenery in the west of Ireland are now dated because tourists' tastes have changed at a much faster rate than the product which is being offered to them. The product should offer more choice, involve more activities and be seen as good value.

- Dublin has succeeded better in putting together the right product. It is now seen as a fashionable place for a week-end break or a short break, with its ideal location close to the U.K. market and cheap access. International trends include a growing preference for city breaks and shorter holidays.

- In the five years leading up to the removal of the Shannon stopover there was minimal growth in the numbers of tourists from North America, while over the same period the numbers from Mainland Europe more than doubled. The Europeans are not as enthused by the attraction of the west as are the Americans. Also, since 1993 the numbers coming across the Atlantic have seen double digit growth rates. It is questionable whether or not this growth could have been achieved if the stopover was still in place.

- As there is easy access along the east coast through the sea ports, the opportunity presents itself to those regions to capitalise on the fact that the tourists are passing through anyhow.

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28See Table 2.2, Page 12.
2.4.6 Regional Employment:

A noteworthy exercise has been carried out by Deegan and Dineen\(^{29}\) that looks at the employment impacts of tourism at regional levels. It contributed over two-fifths of the net increase in employment from 1986 to 1994, but the contribution from different regions varies widely. This information is displayed in Table 2.4.

<table>
<thead>
<tr>
<th>Region</th>
<th>Tourism employment change, 1986-1994 (A)</th>
<th>Total employment change, 1986-1994 (B)</th>
<th>A / B (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dublin-East</td>
<td>14,799</td>
<td>70,477</td>
<td>21.0</td>
</tr>
<tr>
<td>South-east</td>
<td>3,465</td>
<td>3,400</td>
<td>101.9</td>
</tr>
<tr>
<td>South-west</td>
<td>8,456</td>
<td>15,500</td>
<td>54.6</td>
</tr>
<tr>
<td>Mid-west</td>
<td>4,748</td>
<td>2,300</td>
<td>206.4</td>
</tr>
<tr>
<td>West</td>
<td>6,325</td>
<td>2,500</td>
<td>253.0</td>
</tr>
<tr>
<td>North-west</td>
<td>2,567</td>
<td>2,500</td>
<td>102.7</td>
</tr>
<tr>
<td>Midland</td>
<td>2,542</td>
<td>3,838</td>
<td>66.2</td>
</tr>
<tr>
<td>Ireland</td>
<td>42,902</td>
<td>100,515</td>
<td>42.7</td>
</tr>
</tbody>
</table>

Source: Deegan & Dineen.

While Dublin-East enjoyed more than a third of the overall increase in tourism employment, it was still only a fifth of the increase in total employment in that region. However, the figures for the Mid-west and West do not make for comforting reading. In the Mid-west, of which Tralee is a part, for every two jobs created by tourism, one job was lost from other sectors in the region. Since it is a rural region the decline in agricultural employment would have a big part to play in this. This has serious

implications for the region in that there may be an excessive reliance on tourism to prop up employment growth. While some of these jobs are in sectors of the economy which are not directly linked to tourism, many of the direct jobs created are of a casual, part-time or seasonal basis with limited prospects.

These would be appropriate for providing supplementary income into a household but when they replace jobs lost in other sectors the long term outlook is quite ominous. The options left for those seeking work are to take up positions that are poorly paid, or have no job.

This helps to reiterate the importance of the shift away from the "maximum number of tourists" mentality to the "optimum number of tourists", i.e., the number which leaves the greatest revenue through paying the premium for quality.

2.4.7 **Investment:**

Shannon Development has managed to secure IR£29mn. for a range of 162 tourism projects since the European Regional Development Funds grant-aid was first introduced in 1989. It is estimated that this has led to a total investment of over IR£108mn. in the Shannon region.\(^{30}\)

2.5 **Kerry**

Kerry is Ireland's leading tourist region, mainly because it contains some of the country's best scenery, including the Lakes of Killarney, the Ring of Kerry and the Dingle Peninsula.

2.5.1 **Accommodation**

An extensive tourism survey was carried out in the Kerry area in the summer of 1997.\(^{31}\) It was found that Kerry has an accommodation base that includes 65 hotels


with over 3,800 rooms. The hotels have an average annual occupancy of 55%, an average daily room rate of just over IR£40 (national average (n.a.) IR£48), sales per room of IR£26,200 (n.a. IR£34,500) and an operating profit of IR£9,700 (n.a. IR£11,600). Three indicators that cause some disquiet are:

(a) the hotels' level of repeat business was 27% while the national figure is much higher at 46%,

(b) the percentage of Tour Operator business is 39% while the national average is 22%, and

(c) the percentage of Business and Conference customers is 12% compared to 40% nationally.

There are about 540 approved guest houses in Kerry and just 8% of these are either *** or ****. The average annual room occupancy is 38%, the average daily room rate is under IR£18, and the average operating profit per room is IR£1,539. When fixed costs such as financial repayments and the owner’s labour are included, it is likely that the only actual profit is any appreciation of the guest house's capital value. While these figures represent the average, there can be large deviations between the different grades such as the operating profit for **** guest houses averaging over IR£4,000 per room.

There are about 700 self-catering properties in Kerry and their average operating profit is approximately IR£3,400. This is also quite low but again there is the possibility of capital appreciation, especially in recent years, and the labour requirement is minimal. The average annual occupancy was 43% and repeat business 14%.

Kerry has about 60 hostels and over half of these are in South Kerry, twelve are in and around Killarney, and six in Tralee. The average annual operating profit is approximately IR£5,000 per hostel with 37% average annual occupancy and 12% repeat business.
Given the amount of capital that is tied up in the provision of accommodation, the margins are tight. This is the main reason why quality of service has to be a priority to increase the sleeper spending. The operating profit of a **** guest house is seen to be almost 5 times that of a sub-***, but the costs do not increase in the same proportion. For instance, the cost of food is just 20% dearer, while the charge per room has increased by 70%. Also, there are much higher levels of occupancy to absorb the fixed costs and so the break-even point is attained earlier on in the year.

2.5.2 Shannon Development and Cork/Kerry Tourism:

The southern part of the county has a long established tradition in tourism but the northern half has only addressed the sector in the last decade since it gained national prominence. This is also reflected in the manner in which the county is split in terms of the regional tourism bodies. South Kerry is in the South West region, which also includes Cork, while North Kerry is in Shannon Development's Mid-west region together with Clare, Limerick, North Tipperary and South Offaly. This has been a bone of contention since the split occurred ten years ago, with some seeing the present situation as being the most appropriate due to the disparities in the two parts of the county, while others believe that the county would fare better on the whole if it was marketed as one.

2.5.3 Distribution of Tourists:

A report on a recent survey commissioned by the Kerry County Strategy Group highlighted the following findings. Of Ireland's 3.3m overseas visitors in 1993, 0.8mn. of these visited Kerry. The corresponding figures for 1996 show that the number of visitors to Kerry had increased by 25% to one million, the total number of overseas visitors entering the country had risen to 4.7mn., and so its overall market share had fallen three percentage points from 24% to 21%. The report states that the

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decline in market share has resulted in the loss of 128,000 visitors to the county and a loss of revenue of about IR£30m. Access difficulties are seen to be the biggest problem.

There are a number of weaknesses in this argument.

- There has been an increase in city breaks and short holiday trips internationally, especially long weekends with shopping, leisure activity products and cultural facilities attached. This is due to factors such as second and subsequent holidays annually and an increase in real disposable incomes. Therefore many of the tourists coming into Dublin and the surrounding area are destination specific, i.e., if they were not coming to that region, then they would not be coming to Ireland at all. In this sense those tourists are not 'lost' to the Kerry region - in large part they are incremental tourists.

- Another important point is that if Kerry is reaching its carrying capacity, which as yet has not been determined, then the environmental destruction that could occur due to the excess numbers may be irreparable and cause serious erosion to the county's main tourism asset. A growth rate of 25% over three years is quite phenomenal and if it was steeper the necessary infrastructure may not evolve quickly enough to maintain quality of environment and service. On the evidence to date it would appear that extra tourists to Kerry would only put further pressure on the peak period rather than extend the season.

- It is something of a red herring to suggest that more visitors are entering the country through the east coast because access has improved there. It is more logical to assume that more people wished to enter by the east and due to the resulting economies of scale it was possible to make access more efficient and economical. Why would the selling concept be applied ("the tourist wants to enter where access is provided") when it has been replaced by the marketing concept ("access is provided where the tourist wants to enter"), and especially in relation to tourists - they are more demanding and require better value for money. Access to
Kerry is undoubtedly inadequate for the county's thriving tourism industry. Even at present plans are in place for the train journey from Tralee to Dublin to take an extra 35 minutes to complete due to a decaying railway line. This flies in the face of sustainable development and putting the customer first. Tourism providers in Kerry have been criticised for being slow to explore the short break end of the market, even though this segment may not suit them if access is difficult and transport costs are high.

- It is reasonable to argue that policy attention should focus on people factors such as a culture of enterprise, creativity and entrepreneurship along with improving education and quality of service, as opposed to the subsidisation of access to gain possibly unfair competitive advantage. Access, like peripherality, may have become a scape-goat for an inadequate tourism product.
Chapter 3

Government Policy and National Strategy

3.1 Tourism Development since the late 1980’s:

A new government in 1987 brought with it 'The Programme for National Recovery' which saw tourism as an area with tremendous employment potential. This commitment to tourism grew in the following years with 'The National Development Plan' of 1989 and 'The Programme for Economic and Social Progress' in 1991. The government’s motives were based more on a process of elimination than on the merits which tourism had in its own right - manufacturing industry was performing poorly, and agricultural employment was, and still is falling. Another fundamental factor in all of this was that European Structural Funds were available for investment in tourism. The Government placed the emphasis on immediate employment, and long-term aspects such as the environmental impact and sustainability were not part of the picture.

Over the period 1981-1994 there was a 119% increase in the number of over-seas visitors to Ireland, from 1,680,000 to 3,679,000. The most pronounced growth took place in the years 1988 to 1990. However, Ireland's share of tourism receipts was consistently lower than its share of tourists. This is probably a reflection of the heavy reliance on the U.K. market from where over half of Irish overseas tourists come and who are traditionally low spenders. It is worth noting that there is a long-term decline in the average spending of foreign tourists in real terms. In the 1990's it was more than

10% below the levels achieved in the 1960's, although it was higher than the levels experienced in the mid-1980's.

3.2 **Operational Programme for Tourism, 1989 - 1993:**

Possibly the most obvious change over the last decade has been the substantial improvement in the tourism product in Ireland. The chief instigating factors of this are the availability of European Structural Funding and the two Operational Programmes for Tourism (OPTs), 1989-1993 and the current one 1994-1999.

3.2.1 **Government Targets:**

For the five-year period 1987-1992 the Government had set a target of doubling foreign tourist numbers and were on course for the first three years but the momentum did not continue and so they finished up 26% short. On the other hand, the employment target for the same period was for a 25,000 increase, and the increase realised was 26,500.

3.2.2 **Bord Failte Strategy:**

Bord Failte in December 1988\textsuperscript{36} set out a strategy within its own parameters to achieve the Government targets. This four-pronged approach included product development in specialist activities, improved competitiveness in terms of price and quality, appropriate distribution of Irish holiday products, and the promotion of Ireland as an attractive tourist destination. Bord Failte set for itself the aim of doubling up on the number of visitors from each country market. This in itself highlights an inherent weakness in its policy. There was no attempt made to examine the trends and shifts that were occurring in the origin markets for Irish tourism and no clear strategic marketing plan. There has been no decision taken on options such as should marketing

expenditures be spent in areas performing poorly to counter the downward trend, or should it be spent in markets that are on the increase so that they increase even further. A study on the returns on marketing spending could clarify this issue and so make marketing spend much more effective.

3.2.3 Content of the First OPT:
In the first OPT the planned total spending was of the order of IR£300mn., with IR£160mn. of this coming from the European Union (EU). It was obvious that these funds would have only a minimal impact in the early years, outside of the construction industry, and it was only from 1992 on that the effects of the investment would show up in performance terms. It led to a great improvement in the quality and standard of the tourism product. The total volume of investment under the OPT was nearly IR£380mn., with almost half of this coming from the EU, one sixth from the Irish public sector, and one third from the private sector. 73% of the funds were spent on product development with almost all of the remainder being apportioned relatively equally between marketing (13%) and training (14%).

3.2.4 Evaluation of First OPT:
An evaluation of the first OPT by the Department of Tourism, Transport and Communications was based more on ensuring that spending targets were met and immediate outcomes, rather than any examination of improvements in the quality of service to tourists. While there was tremendous growth in the Irish tourism industry from 1988 to 1990, this cannot be seen as being due to the funding under the OPT, since the bulk of this money was not drawn-down until after this growth had taken place. The Economic and Social Research Institute's (ESRI's) evaluation report in 1993 pointed out a number of areas that needed to be addressed prior to the commencement of the second OPT. These included the following:

• When the Government was deciding on how to distribute the funds available they were faced with the possibilities of opting for regional equality, with its job
creating potential in the less favoured areas of the country, or economic efficiency, with strategically focused projects which would prove much more effective in areas such as Dublin as opposed to less developed regions. In broad terms, the first OPT opted for the wide geographic spread of projects. This meant limited impact due to a large number of small projects as opposed to a series of strategically focused significant ones. Having said that, would the lack of a geographic spread have been pointed out as being a weakness if the projects were more focused because of the strong possibility of the creation of over capacity? (A no-win situation!)

- At the same time there was money to be sought to develop infrastructure relevant to tourism through other sources such as the Operational Programme in Water and Sanitary Services, on Peripherality, LEADER (European Union initiative for Rural Development) and INTERREG (Inter-regional co-operation and development) programmes. There was the need for greater co-ordination between these and the OPT.

- Greater integration was necessary between product development, marketing and training, with more transparent linkages being put in place.

- The appraisal methods for projects needed to be more long term, qualitative as opposed to quantitative, and should have taken the displacement effects into account. It is suspected that the view of European moneys being 'free goods' was common, and as a result the effectiveness with which they were used was not a primary concern.

- There was an over-emphasis on physical components like buildings and facilities, and insufficient attention was given to the environmental impacts and studies of international market trends. The supply-side measures were firmly in the driving seat.

While the above criticisms were justified, the three-pronged effect of:

- the extensive funds that were now available to the industry;
- the long-term nature of the new approach; and
- the partnership principle involving the EU, the private and public sectors, all provided a solid platform for the future development of tourism in Ireland.

Any reports which the Irish Government commissioned relating to the first OPT were focused on economic issues and were generally positive. An Taisce were commissioned by the World Wide Fund for Nature to undertake an interim report in 1992 and it proved to be intensely critical of the thinking behind the OPT. It suggested that the plan relied on 'the exploitation of Irish scenery, heritage and culture to achieve short-term economic targets'.

3.3 Tourism Organisations:

Due to the major investment in Irish tourism in the first OP, the organisations that were delivering different aspects of the tourism product attracted more attention to ensure that their effectiveness was maximised.

3.3.1 Tourism Task Force:

The new partnership of private and public sectors that was required in the provision of the EU Structural Funds was a major factor in the overhaul of organisational appropriateness. As an acknowledgement of the contribution of the private sector the Tourism Task Force was formed in 1992. This group was made up, in the main, of people working in the private sector and through it, advice was formally given on the directions that the industry should take. However, their remit lay mainly in the areas of employment generation and marketing and was in no way comprehensive. Therefore it would be inappropriate to criticise the Task Force for confining its recommendations strictly within the tourism sector, and even then having a strong focus on marketing. It is arguable whether or not the proposal for the establishment of a National Tourism

Council was a good idea, given its potential undermining of the role of Bord Failte and
the transfer of policy-making outside the relevant government department. It may
have been better to reform the existing state agencies instead of creating a new layer of
bureaucracy. While the Task Force did address points such as training, tax breaks,
niche marketing strategies, quality, seasonality and access, its private sector bias
became quite obvious with its call for the sector having a stronger voice in policy
formation and larger portion of the Structural Funds 'pie', with neither of these being
supported by objective reasoning.

3.3.2 Regional Tourism Organisations (RTOs):
In the early-1980s the role of the Regional Tourism Organisations was limited and
their resources were insufficient due to the prominence given to the national marketing
campaign. The first OPT gave them new life with a developmental function which was
supported by national and EU funds. The reasoning behind their new-found importance
was that they had an intimate local knowledge to which no other tourist organisation
had access. Also the EU placed emphasis on sub-regional dimensions within countries
and so the RTOs were probably a useful tool in securing European funding.

3.3.3 National Tourism Council:
The National Tourism Council came into being in the autumn of 1993. It had a mix of
public and private sector members and was chaired by the Minister for Tourism and
Trade. At its launch the then Minister, Charlie McCreevy, signalled that it would have
a new approach to decision-making, with the following quotation taken from the press
release for the launch of the Council - "We have had more than enough academic
debate, reports and studies about Irish tourism." Such bravado could have had
serious implications for the future of Irish tourism if it was acted upon. For instance,
what are the international trends of tourists into Ireland, how effective is tourism

training, and what strategic planning techniques are most appropriate to tackle the problems of seasonality and access? Whatever actions are deemed to be most suitable should be the result of good independent research, and therefore the accountability, effectiveness and efficiency of public funds would not be compromised. At any rate, it appears that as this scene was played out, the government department was the main player in the formulation and design of the second OPT, with the Council limited to an advisory role. While the private sector has more direct access to the Minister and his or her officials, there is no apparent change in the decision-making process.

3.3.4 Bord Failte:

The Government in 1994 decided that it was time for a closer examination of Bord Failte. Arthur D. Little Ltd., London were the government appointed consultants who were given the job of exploring whether or not Bord Failte was capable of delivering on targets, its ancillary activities, its effectiveness, and how much the Irish tourism industry depended on it. It was found that Bord Failte should refocus on its core functions of selling Ireland overseas, helping the industry develop in Ireland and providing information towards better decision-making. These recommendations were taken on board and many of its non-core activities have been out-sourced in the last number of years. Caution is needed regarding the distancing of the Bord from product development, since this is the area that will have most effect on the number of high yield tourists and repeat visits. It is doubtful that the private sector will display the maturity required to prioritise product development, since their interests are more short-term focused due to the constraints under which they operate. To borrow a quote from the qualitative research of this study:

"With the business person you have very much a chicken and egg situation, because the business person is not open late unless there is money in the till at the end of the night, yet people will not come to town unless they know businesses are open"

Shop Owner
In recent times Bord Failte has had to cope with the resignation of three of its five senior management team within a period of six months. The present chairman, Mark Mortell, has stated that he would like to see changes in the seven regional tourist authorities since "they should reflect the needs of the incoming visitor rather than geographic structures."\(^{39}\)

3.4 **Operational Programme for Tourism, 1994 - 1999:**

The second OPT was launched towards the end of 1994 with the objective to 'maximise Ireland's tourism potential by increasing tourism revenue, thereby creating much needed employment'.\(^{40}\) This was translated into the specific targets of increasing real foreign tourism revenue by 50%, tourism dependent employment by 29,000, and to increase the percentage of tourists that holiday outside of the peak months. Other intended outcomes included the development and marketing of the tourism product in line with international demand, along with improvements in quality and value for money.

3.4.1 **Contents of Second OPT:**

In total it is envisaged that the programme will cost IR£652mn. (at 1994 prices) with IR£370mn. of this coming from Europe, IR£200mn. coming from the private sector and the remaining IR£82mn. from the Irish Government. This is a decline in the private sector's share compared to the initial programme, and gives the impression that the intention is to bleed the EU for every last penny, since this flies in the face of the principle of promoting self-reliance within the industry. An examination of the investment mix highlights that the proportion of spending on product development has declined from 73% in the first programme to 63%, while the spending on marketing has increased from 13% to 19%.

\(^{39}\)The Sunday Tribune, 1998, "A Welcome Change", Article by Paul O'Kane, 10th May, Dublin.

3.4.2 Evaluation of Second OPT:

The second OPT chose the strategic focus of larger projects, e.g., Dublin received over a quarter of the total expenditure. A valid argument against this focused spending is that it leads to heightened congestion in popular destinations and is not in the interest of ensuring better long-term income and employment outcomes. However, in Tralee the publicly funded flag-ship projects have acted as catalysts to stimulate the other private sector investments in additional activities such as accommodation and restaurants, once the main attractions were well marketed.

Some of the proposed investments in buildings and tourism facilities relevant to Tralee included the enhancement of the quality of information available to tourists through improvements in the regional tourist offices, and enrichment of the range of special interest holiday facilities for active and passive activities. The performance appraisal measures were more explicit than previously and related to factors such as increased overseas spending, improved seasonality, more repeat business and projects with 'character', thus lessening the displacement effects. Marketing was to be aimed at improving the seasonal spread of visitors, expanding access routes, developing new markets, especially niche markets linked to specialist activities, and attracting more high-yield tourists in spending terms. The training elements were aimed at giving the unemployed and early school-leavers skills in the main crafts of tourism, running full-time courses for school-leavers, continuing training for those who are already in the industry to improve professionalism, and 'training for trainers'.

A number of worrying aspects of this programme have been highlighted:

- There is little reference to the environment, which is probably the most valuable tourism asset that this country has. In April, 1998, an initiative was launched which looks at tourism and sustainable development. However, this appears to be no more than lip service to the subject, given the fact that the funding available for all projects country-wide is IR£2.4mn.
• Golf courses and waterways have been proposed for further funding even though the evaluation of the first OPT pointed out that there was over-capacity in these areas already.

• Some of the large-scale projects could fall by the way-side if the private sector does not come up with its part of the funding.

• Funding to improve accommodation in lower grade hotels provides them with a subsidy and an unfair advantage since there is no accommodation shortage in this section of the market.

• Much of the marketing expenditure has occurred without the introduction of any new strategies to examine how effective marketing spending actually is. Integral evaluations into the "fuzzy" areas (such as optimum marketing expenditure in the various countries and which media form to use) have not been established, and so there is still a dearth of information regarding any causal link between marketing spending and any increase in the numbers of tourists entering the country.

• If the private sector was ever accused of concentrating on the short-term, it was never more evident than in its contribution to the training fund - one quarter of one percent! Also, there is greater emphasis on the throughput of trainees as a yardstick, rather than the quality of their training.

On the positive side, the move away from maximising numbers of tourists, to maximising the revenue from them is in keeping with the concept of sustainability.

3.5 Business Expansion Scheme (BES):

The BES is a policy instrument of the Government which, while initially put in place to stimulate investment in the manufacturing industry, was later extended to include tourism. Its major impact has been in relation to the private sector funding in the OPTs. In the first OPT it accounted for about half of the private sector funding, since property-based investments were included as 'qualifying trades'. The incentive for the
investor was tax relief at the top marginal rate and as a result, approximately one third of the investment was tax foregone by the government. In that sense one sixth of the private sector funding was in reality further public funding. In the second OPT the property-based investments were no longer included as 'qualifying trades' and so the proportion of BES funding fell to less than 10% of the overall private sector funding.

3.6 Suggestions for the Third Round of the Operational Programme for Tourism, 2000 - 2005:

This will be an opportunity to shape the Irish tourism industry into a form that provides a platform for its future sustainable development. Possible options include the following:

- More investment should be geared towards human resources and training as opposed to infrastructure. There are numerous factors that support this logic. First, tourism is a service industry and the quality of the product, i.e., the tourist's experience, is directly linked to contacts with service providers. Effective training in tourism related areas will prove to be fundamental in improving the quality of the tourism product on offer. Secondly, training receives a negligible portion of private sector investment, an amount that causes one to question the private sector's understanding of the basic tenets on which its industry operates and on which it will either succeed or become defunct. As a result it is most unlikely that training will take place unless it is funded from public or EU coffers. Thirdly, updating of skills and know-how is imperative in the provision of a market-led product. Fourthly, EU funding will be geared more towards human resources in its Third Round of Structural Funds. Traditionally it has been easier for business people in the private sector to fund infrastructure rather than training since the owner has possession of the physical structure whereas the trained employee could leave at any time. However, if training was widespread the potential new employees would also be better skilled. From the public sector point of view, it
was easier to justify spending public money on that which was very visible. Overall, training could lead to a better return on investment than infrastructural developments but only if the evaluation measures are based more on the quality of the training than on the through-put of trainees. This should include formal evaluation by trainees regarding the trainers as a condition of the trainers' continuance in the educative role, along with greater input and feed-back from employers.

- It is not appropriate to equate employment creation with the success of tourism due to limitations such as the carrying capacity of the area and the quality of the employment. Extra low paid jobs due to increasing numbers of tourists may well herald the initiation of the decline of an area's tourism potential. While maximising employment is a laudable objective in its own right, it is not a fitting one to adopt unless the employment is sustainable in the long-term. Therefore the rate of increase in tourism related jobs should have a long-term basis if it is to be a suitable criterion, and the rate of increase in the average personal income also needs to be included.

- Priority must be accorded to the effects on the social, cultural and physical environment that the tourist visits. What is unique to the area needs to be conserved while accepting that change is both inevitable and good - good if it incorporates that which is acceptable and beneficial to the local community in the first instance, and secondly that which meets the needs of potential future tourists. It is this sense of balance that must be promoted and achieved if a sustainable tourism product is to be on offer. Therefore those who are given responsibility for the evaluation of the third OPT should devise evaluative techniques which exclude short-term measures or targets. While this may be a difficult undertaking, the consequences of not effecting suitable measures could prove onerous for Ireland's tourism industry.

- Areas that are experiencing over-capacity require special attention. Any project that would lead to an increase in the numbers of tourists coming in to the area
while it is experiencing over-capacity must receive no funding and should be actively discouraged. This could take the form of funding the provision of information, research or expertise to the Local Planning Authority so that it is better positioned to make the appropriate judgement regarding a new development. The whole concept of carrying capacity needs to be investigated and teased out in deciding what criteria should exist for an area to be classified as suffering degradation due to excessive numbers of tourists. Visitors to an area have little appreciation of what it has to offer if it is apparent that the local tourism interests are themselves seeking to bleed it dry for short-term financial gain. There is no point in aiming for a greater diversion of tourists to other areas unless the situation, after analysis, shows that this dispersion will lead to less environmental damage. For example, it may be better to have a thousand visitors causing a 10% over-capacity in one large destination than to have ten different groups of a hundred causing an even greater proportion of over-capacity in ten more remote and as a result more susceptible destinations.

There should be a mix of both large-scale projects with distinction and flag-ship potential along with small-scale ones with a broad geographic spread. The deciding factors regarding their suitability should not revolve around size but rather around sustainability, value-added, complementarity with the unique attributes of the destination, evolving trends in the requirements of existing and potential customers, off-season appeal, capacity of infrastructure and interaction with social and cultural harmony in the area.

Private sector projects in areas such as accommodation or catering, which are in competition with existing facilities of a similar standard, should not be considered for funding. If funded the exercise would only serve to undermine the competing businesses in the same area.

The Regional Tourism Organisations have boundaries that are too geographically defined. Possible developments for these organisations would include the extending of their boundaries for promotional purposes by a specified number of
kilometres so that the area that they promote is possibly double the size of their own region. This would help the plight of tourists in Tralee, for instance, who are seeking information about South Kerry which is in a different region. Strong partnerships should be forged between different neighbouring regions to maximise the synergistic benefits of their collective expertise, especially in compounding customer satisfaction and thereby attracting repeat business.

- It is important that the Government is successful in dividing the country into different regions if it is to maximise EU Structural Funds in the next round. It will be an advantage in the achievement of regional equality since many areas in the country outside of Dublin are sufficiently disadvantaged compared to the EU average to warrant funding.

- Marketing is targeted to receive almost one fifth of the funding available in the second OPT. Having ploughed large investment in to product development and infrastructure over the first two OPT's the marketing allocation can now be enhanced. To date there has been insufficient research into how these resources are distributed to maximise their effectiveness. It is imperative that the tourism industry takes stock of where it is presently positioned, chooses what directions it should now pursue in conjunction with its customers (which includes local communities) and then carries out the most appropriate promotion that will help effect the required changes. This sense of control will be fundamental in growing the Irish tourism industry, especially at local level.

- Partnership, information and technical assistance are some of the most powerful tools that must be made readily available to entrepreneurs with special interest activity ideas. These people require little or no physical facilities but have the potential to bring high-yield tourists to an area in the non-peak season. The investment that they need is in marketing and possibly developing their own internet site, knowledge regarding the nationality of their clients, contact with similar product suppliers in other areas to highlight the pitfalls and to get advice regarding best practice, and recognition for their contribution to other sectors of
tourism in the locality. Also, research by interests such as accommodation establishments in to the setting up of special interest activities should be fostered.

- All tourism interests and tourists alike should have information freely available to them regarding the exercise of environmental good practice and locations where it is presently being carried out. The present programme for sustainability in tourism should be greatly expanded and any stipulation regarding short-term results should be removed. The best exercises in sustainability are occurring when they are derived from attitudes that have been internalised and so are derived from a thought process that conceives them as being the only reasonable progression. It is the development of this attitude among all tourism providers and consumers that leads to true sustainability and deserves funding.

- The whole concept of communitarianism and local partnership, which has been recognised in the stipulations for EU funding for quite some time, is becoming a more powerful force globally. It is in the interest of tourism bodies that the concept be incorporated willingly before it becomes an imperative. This could involve the establishment of open channels of communication between local tourism interests and the broad communities in which they are based. It could also effect better decision-making and better relations between the different parties. The community as a result has greater knowledge and ownership of the developments and the tourism interests are less likely to implement decisions that will contribute to tension.

Overall the OPT, 2000 - 2005 needs to move away from the older role of being the 'giver of grants' to a role of being of service and support, and more like a 'reliable friend'. Any grants that are given to the private sector should be in the form of interest-free loans. Communication must be at the core of the OPT's function through research, partnership, education, information transfer and information technology. Then the private sector will develop self-reliance in setting up its own structures but not without effective, expert and timely advice and support.
3.7 The Future:

What is in the pipeline for the period following 1999? The Government, while aspiring to more self-reliance within the industry, has not followed this through with policies that would foster it. Instead the dependency culture has continued and something of a culture shock is on the agenda for the new millennium. It is very likely that the European Structural Funds will dry up to a large extent (see Appendix D) and the tourism sector is in no way prepared for this scenario.

The inflow of EU funds to Ireland has been exceptionally large in proportion to GNP, ranging between 4% and 7% from 1986 to 1996. Boone\textsuperscript{41} has found that among a few small countries, which did not include Ireland, that had received a very large volume of aid, i.e., generally over 15% of GDP, "there is a high correlation between aid and investment". While it is possible that EU assistance to Ireland falls into this category, he found that, using data for almost 100 countries over the period 1979-90, the results showed that the long-term contribution of foreign assistance to growth tends to be negligible - the MPC (marginal propensity to consume) was virtually one, and consequently, the MPI (marginal propensity to invest) was virtually zero. If this assessment holds true for Ireland, then there is no need to become overly agitated at the drop in EU funding.

However, the Government is at the helm of an Irish economy that is in a very healthy state. Looking at some of the performance indicators from 1990 to 1996:

- the Irish inflation rate averaged just less than 2.5%, while the EU average over the same period was 3.6%.
- the unemployment rate in Ireland in 1990 was 13.3% and had fallen to 11.5% by 1996. During this time the EU average rose from 8.4% to 10.9%.

\textsuperscript{41}Boone, Peter, 1994, "The Impact of Foreign Aid on Savings and Growth", London School of Economics, Working Paper, June.
• the Irish short-term interest rate stood at 11.1% in 1990 and fell to 5.8% by 1996. The EU average fell from 8.2% to 5.4%.

While there is a strong inflow to the labour market due to the baby boom of the 1970s and immigration, it is beginning to slow down. These workers have a higher than average level of education, and this will have consequences for the tourism industry since many of the jobs in tourism are at the lower end of the labour market where it is likely that shortages will occur. A number of hotels, most notable some of the larger groups like Jury's and the Great Southern, are already experiencing recruitment difficulties. Many of the changes necessary to improve this situation rest in the hands of the Government, such as increasing personal allowances and lower tax bands, making it more attractive to work through lowering the replacement ratio (i.e., the ratio of social welfare allowances to after-tax earnings), and improving the reservation wage.

Ireland will be participating in the European Monetary Union's (EMU's) Single Currency in 1999, but Great Britain will not. Should Sterling become weak compared to the Euro, this could have a negative impact on Ireland's most important market for overseas tourists. However, this is something of a 'worst case scenario' and even then it would be counter-balanced by other economic and political gains such as lower interest rates (than would otherwise be the case), less risk due to currency fluctuations, simpler transactions and less currency costs due to foreign exchange.

The Good Friday Peace Agreement of 1998 has major implications for Irish tourism and opens up all kinds of possibilities for the marketing of all of the island of Ireland as a tourist destination. Now that the Peace Agreement is ratified on both sides of the border the role of the Overseas Tourism Marketing Initiative (OTMI) may expand.

The OTMI spent about £7 million on advertising campaigns in 1997. At present it promotes Irish tourism on a thirty two county basis in Britain, the US, Germany and France and is supported by the Irish Government, the Northern Ireland Tourist Board, the International Fund for Ireland and the EU.
Chapter 4

Tralee, an Economic and Demographic Profile

4.1 Population:
Tralee is the administrative capital of Co. Kerry and had a population of 19,056 at the time of the 1996 Census of Population. The Tralee town environs had another 894 persons bringing the total to 19,950. The town is Kerry's biggest retailing centre with many multiple stores having outlets there. It is the base for the county council, the Institute of Technology and a number of major manufacturing industries.

4.1.1 Trends in Population:

<table>
<thead>
<tr>
<th>Area</th>
<th>1986</th>
<th>% change</th>
<th>1991</th>
<th>% change</th>
<th>1996</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>'86-'91</td>
<td></td>
<td>'91-'96</td>
<td></td>
</tr>
<tr>
<td>Tralee Urban District</td>
<td>17,620</td>
<td>+1.4</td>
<td>17,862</td>
<td>+11.7</td>
<td>19,950</td>
</tr>
<tr>
<td>County Kerry</td>
<td>124,159</td>
<td>-1.8</td>
<td>121,894</td>
<td>+3.5</td>
<td>126,130</td>
</tr>
<tr>
<td>Nationally</td>
<td>3,540,643</td>
<td>-0.4</td>
<td>3,525,719</td>
<td>+2.8</td>
<td>3,626,087</td>
</tr>
</tbody>
</table>


The increase of 11.7% in the population of Tralee in the five years after 1991 was well ahead of the increase of 3.5% experienced in the county and 2.8% in the country overall.
4.1.2 Age Structure of Population:

The age structure of the population in the Tralee urban district is set out in Table 4.2, where it is compared with the county and national statistics from the 1996 Census:

<table>
<thead>
<tr>
<th>Age</th>
<th>Number in Tralee</th>
<th>Tralee %</th>
<th>County %</th>
<th>National %</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-14</td>
<td>4,158</td>
<td>21.8</td>
<td>23.6</td>
<td>23.7</td>
</tr>
<tr>
<td>15-24</td>
<td>3,828</td>
<td>20.1</td>
<td>15.9</td>
<td>17.5</td>
</tr>
<tr>
<td>25-44</td>
<td>5,246</td>
<td>27.5</td>
<td>26.0</td>
<td>28.0</td>
</tr>
<tr>
<td>45-64</td>
<td>3,653</td>
<td>19.2</td>
<td>20.5</td>
<td>19.4</td>
</tr>
<tr>
<td>65+</td>
<td>2,171</td>
<td>11.4</td>
<td>14.0</td>
<td>11.4</td>
</tr>
<tr>
<td>Total</td>
<td>19,056</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: C.S.O. National Census 1996.

The population in the 0-14 age group is below the county and national averages, which are similar. This may be because of the low level of well-paid employment in the area and so parents with young children are forced to go elsewhere to source work. The numbers in the 15-24 age bracket are above the national average and over 4% above the county average. In the categories which are aged 25+ the towns statistics are very similar to the national ones.

4.1.3 Gender and Household Structure:

Tralee's population of 19,950 in 1996 was made up of 10,396 females (52.1%) and 9,554 males (the remaining 47.9%). The average number of persons in permanent households in Tralee and its environs was 3.44 persons in 1986, 3.19 in 1991 and 2.96
in 1996. The number of households in the area has been growing at a faster rate than the population, i.e., while the population increased by just over 10% during the decade from 1986 to 1996, the number of permanent households increased by almost 30%. For instance, the number of households inhabited by two people has increased by over 60%, and one person households have increased by 55% in the ten years 1986-1996.

4.1.4 Size of Family Units:
The environs of Tralee are also included in the Small Area Population Statistics and the numbers here increased by 40% from 637 in 1991 to 894 in 1996. Figure 4.1 manifests that while the proportion of families in Tralee and its environs that are made up of four people has remained relatively static over the decade 1986-1996, the families with more than four have declined and those with less than four have increased. In fact, while couples made up a quarter of all households in 1986, they now account for one third of them. The number of households inhabited by two people has increased by over 60% and one person households have increased by 55% in the ten years.

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**Figure 4.1**


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4.1.5 Migration:

An examination in Table 4.3 of the change in the 15-19 age category of 1986 to the 25-29 category of 1996 in Tralee and its environs shows that the male population declined from 864 to 669, a drop of 23%. This drop is identical to the national change and slightly lower than the decrease in the county. All but 2% of this decrease in Tralee had occurred in the first five years (taking into account the 20-24 age grouping of 1991). The decrease in the female population for the same age categories over the same period was from 869 to 792, a drop of 9%. However, the female population had decreased by 19% in the first five years to 704 and increased again in the next five. Overall this highlights a significant level of net outward migration in the age groups which one would expect to be entering the labour force, and the only mitigating fact is that half of the migration outwards that has occurred in females from their late teens to early twenties is counter-balanced by inward migration from their early twenties to their late twenties. The outward migration or emigration of females in the county over the decade was 30% and it was 20% in the state overall.

Table 4.3

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Male</td>
<td>Female</td>
<td>Male</td>
</tr>
<tr>
<td>Tralee</td>
<td>864</td>
<td>869</td>
<td>685</td>
</tr>
<tr>
<td>Kerry</td>
<td>5,426</td>
<td>5,224</td>
<td>3,911</td>
</tr>
<tr>
<td>State</td>
<td>169,887</td>
<td>161,213</td>
<td>136,479</td>
</tr>
</tbody>
</table>


4.1.6 Age Dependency:

Tralee had an age dependency of 40% in 1986, with just 10% pensionable. In 1991 the age dependency had decreased to 37%, but the pensionable categories had
increased to 12%. By 1996 the dependency was 33% and 11% of these were pensionable. This serves to point out that while the population of Tralee had increased by 13% from 1986 to 1996, those aged 15-64 had increased by 25% and those aged 0-14 had decreased by 14%. While the older population depending on pensions are remaining relatively static and there has been a substantial increase in the potential labour force, there is a marked decrease in the younger population which would enter the labour force in the future.

4.2 Educational Attainment:

Figure 4.2


As expected, the higher the level of educational attainment, the smaller the probability of being unemployed. One of the advantages that tourism has to offer is that the majority of the jobs within this service industry are not academically challenging, as a

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43It is described as the 'potential' labour force because all aged between 15 and 64 are included - no allowance has been made for those who are still students, home makers, those unable to work or those who opted for early retirement. Due to these latter categories the actual labour force is approximately half of the 'potential' labour force.
result are more skills based and many suitable candidates for tourism jobs would be found among those with only a primary or lower second level education. These make up two-thirds of the unemployed in the Tralee area.

Table 4.4

<table>
<thead>
<tr>
<th>Highest Level of Education*</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>Not Stated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tralee Males 15+ :</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- At Work</td>
<td>481</td>
<td>687</td>
<td>1,252</td>
<td>717</td>
<td>71</td>
</tr>
<tr>
<td>- Looking for First Job</td>
<td>32</td>
<td>33</td>
<td>34</td>
<td>6</td>
<td>18</td>
</tr>
<tr>
<td>- Unemployed</td>
<td>368</td>
<td>215</td>
<td>239</td>
<td>43</td>
<td>44</td>
</tr>
<tr>
<td>Tralee Females 15+ :</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- At Work</td>
<td>184</td>
<td>409</td>
<td>883</td>
<td>603</td>
<td>46</td>
</tr>
<tr>
<td>- Looking for First Job</td>
<td>17</td>
<td>18</td>
<td>25</td>
<td>5</td>
<td>17</td>
</tr>
<tr>
<td>- Unemployed</td>
<td>52</td>
<td>64</td>
<td>64</td>
<td>36</td>
<td>5</td>
</tr>
<tr>
<td>Tralee Total</td>
<td>1,134</td>
<td>1,426</td>
<td>2,497</td>
<td>1,410</td>
<td>201</td>
</tr>
<tr>
<td>Tralee %</td>
<td>17.5</td>
<td>22.1</td>
<td>38.6</td>
<td>21.8</td>
<td>-</td>
</tr>
</tbody>
</table>

*Key to Highest Level of Education:

1. Primary only (no person has been registered as being without formal education);
2. Lower Secondary (Inter Cert, Group Cert, 'O' Levels);
3. Upper Secondary (Technical, Vocational, Leaving Cert, 'A' Levels);
4. Third Level (Sub-degree, Degree, Professional Qualification).


Table 4.4 shows that of the unemployed males in the Tralee area in 1991, 43% had only primary education and a further 25% had lower second level.
4.3 Employment:

4.3.1 Labour Force:

The Labour Force in Tralee is made up of the employed and the unemployed that are available for work. The details of the labour force in Tralee in 1986 and 1991 are set out in Table 4.5. Females accounted for 33.5% of the labour force in 1986 and this had increased to 36.4% by 1991. The labour force is expected to decrease in the early years of the new millennium due to the decline in the younger population. However, although the statistics for Tralee are not published at present for the 1996 labour force survey, it is anticipated that there will be a dramatic increase in the labour force due to the already highlighted 25% increase in the town's population aged 15 to 64 in the decade 1986 to 1996.

<table>
<thead>
<tr>
<th></th>
<th>Tralee 1986</th>
<th>Tralee 1991</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>3,211</td>
<td>3,208</td>
<td>+4.4</td>
</tr>
<tr>
<td>Female</td>
<td>1,895</td>
<td>2,125</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>5,106</td>
<td>5,333</td>
<td></td>
</tr>
<tr>
<td>Employed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unemployed and Available for Work</td>
<td>1,052</td>
<td>1,032</td>
<td>+2.3</td>
</tr>
<tr>
<td></td>
<td>253</td>
<td>303</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>1,305</td>
<td>1,335</td>
<td></td>
</tr>
<tr>
<td>Labour Force</td>
<td>4,263</td>
<td>4,240</td>
<td>+4.0</td>
</tr>
<tr>
<td></td>
<td>2,148</td>
<td>2,428</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6,411</td>
<td>6,668</td>
<td></td>
</tr>
</tbody>
</table>

Source: C.S.O.

Of the people in Tralee that were working 60% were male and 40% were female, while those that were unemployed were 80% male and 20% female. The disparities in the proportions of the different genders at work and unemployed has been highlighted by
Nagle and an explanation presented is that any woman who is unemployed and whose husband is unemployed also is seen as a dependent and the fact that she herself is seeking employment is not taken into account. Two drawbacks of this are that it belies the actual unemployment situation, and training opportunities that are being devised are more likely to favour males. Those who were either unemployed or looking for their first job accounted for 19.3% and the remainder were working.

4.3.2 Employment by Industry:

Figure 4.3


Source: C.S.O.

Figure 4.3 shows that manufacturing employment is on the decline in Tralee. From 1982 to 1993 it had dropped by 29% according to figures sourced from the County

Enterprise Board. If the five categories commerce, transport, public administration, professional services and other are taken to represent the services sector, this increased from 61.4% of total employment in 1986 to 65.1% in 1991. It is important to keep in mind that this occurred in the period when Tralee was not yet established as a tourist destination.

4.3.2 Unemployment:
The most accurate statistics for measuring unemployment are obtained from the Labour Force Surveys. The Live Register is not designed to measure unemployment since it includes part-time, seasonal and casual workers once they are receiving Unemployment Assistance or Benefit. However, the Live Register is a very useful barometer for trends in unemployment, and in this respect it is an appropriate application in this study.

<table>
<thead>
<tr>
<th>Year</th>
<th>Tralee</th>
<th>Kerry</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>1992</td>
<td>4,123</td>
<td>10,080</td>
<td>293,719</td>
</tr>
<tr>
<td>1993</td>
<td>4,407</td>
<td>10,102</td>
<td>297,089</td>
</tr>
<tr>
<td>1994</td>
<td>4,329</td>
<td>9,337</td>
<td>280,183</td>
</tr>
<tr>
<td>1995</td>
<td>5,057</td>
<td>10,227</td>
<td>285,423</td>
</tr>
<tr>
<td>1996</td>
<td>4,417</td>
<td>10,247</td>
<td>270,156</td>
</tr>
<tr>
<td>1997</td>
<td>4,343</td>
<td>9,985</td>
<td>247,730</td>
</tr>
</tbody>
</table>

Source: C.S.O.

Table 4.6 demonstrates that while those claiming benefit or assistance throughout the state has declined dramatically by 16.7% over the five years from December 1992 to December 1997, unemployment in Kerry has remained relatively static and in the
Tralee area the situation has deteriorated - there were 5.3% more on the Live Register than five years previously. During 1997 the number of people on the Live Register fell by 8.3% nationally, by 9.0% in the Mid-west region, but by 1.7% in Tralee. It is accepted that the December figures from the Live Register virtually exclude all seasonal, part-time and casual workers in the tourism industry. It also serves to highlight that these jobs should not be depended upon to create a stable economy in Tralee. This stability will only be derived from an equilibrium between employment in tourism and employment in other sectors of industry. An economy which exists in a vacuum devoid of robust manufacturing and services employment other than tourism is very volatile and susceptible, given the obvious low grade employment that tourism offers and its highly demanding customers.

Table 4.7


<table>
<thead>
<tr>
<th></th>
<th>1993</th>
<th>1995</th>
<th>1997</th>
<th>% Change 1993-1997</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male under 25</td>
<td>829</td>
<td>778</td>
<td>525</td>
<td>-36.7</td>
</tr>
<tr>
<td>Male 25 and over</td>
<td>2,163</td>
<td>2,515</td>
<td>2,227</td>
<td>+3.0</td>
</tr>
<tr>
<td>Female under 25</td>
<td>430</td>
<td>507</td>
<td>371</td>
<td>-13.7</td>
</tr>
<tr>
<td>Female 25 and over</td>
<td>985</td>
<td>1,257</td>
<td>1,220</td>
<td>+23.9</td>
</tr>
</tbody>
</table>

Source: C.S.O.

The decrease in the unemployment levels from 1993 to 1997 among the under-25's of 29% has been achieved partially through Foras Aiseanna Saothair (FAS) courses and other training courses. The over-25's have experienced an almost 10% increase in unemployment over the same period and four-fifths of this increase is attributable to females.
4.4 Infrastructure

4.4.1 Traffic:
Even prior to the recent upsurge in tourists into the town Tralee suffered from traffic congestion. The main proposal for tackling this is the introduction of a northern and a southern ring road. Although these plans have been in existence for twenty years they have not been brought to fruition due to lack of finance being made available by the Department of the Environment. At present it appears promising that the northern ring road will be actualised in the near future.

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**Figure 4.4**

Access Times to Places of Tourist Interest.

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*Key to Graph:*
- Green: Tralee town centre
- Brown: Short walk from centre
- Light yellow: 5 minute drive
- Dark yellow: 10-30 minute drive
- Blue: Half day trip
- Magenta: Full day trip
Figure 4.5

Map of Tralee and Surrounding Area
A step that is currently being introduced towards lessening the traffic congestion is the installation of video surveillance of the roads leading into and in the centre of Tralee. It will involve the positioning of about 24 video cameras in strategic locations around the town, which relate footage into monitors in the Garda (police) barracks. While there is an initial reaction from the public relating to this intrusion to their privacy, its main advantages relate to security and crime. The reduction in crime levels and improved traffic flow has major potential in supporting the provision of a high quality tourist experience.

4.4.2 Road Access:

Major routes entering and leaving Tralee include the N22 to Cork and the N21 to Limerick. These are being improved but on the whole they are not up to standard.

"How the hell are you going to get from Castleisland to Tralee? It must be the worst most atrocious road there ever was!"

Accommodation Provider.

The N86 to Dingle, the N70 to the Ring of Kerry and the N69 to the Tarbert-Killimer car ferry have deficient surfaces and the improving of these would help establish Tralee as a suitable touring base. The town's most valuable asset is its location and as a result sub-standard roads have the potential of being one of its worst liabilities.

The Annual Average Daily Traffic (AADT)\(^4\) in Tralee was measured at eight junctions in the area each year and from 1989 to 1996 the average went from 5,586 to 9,263. The average annual percentage growth rate was 8.0%. The overall growth in the seven years was 66% with three-quarters of the growth occurring in the three years 1993 to 1996. This is slightly ahead of the growth of 62% in AADT on the national roads in Kerry over the seven years. It is inevitable that the traffic infrastructure will

\(^4\)Source is a direct communication from Road Design, County Engineer's Dept., Kerry County Council.
come under increasing pressure with the rise in tourist numbers into the area and unless the traffic is kept flowing the quality of the tourism product will deteriorate as a result. This makes it easier to understand how the general public may see it as justifiable to impose a tax on tourism related businesses to cover the extra costs of bringing the town's infrastructure to the level which would have existed if the influx of tourists had not occurred. On the other hand it could be argued that were it not for the growth in tourism the infrastructure may have been allowed to deteriorate to a much worse state than presently exists.

A major problem to traffic in the area was the inadequacy of Blennerville Bridge. In recent years this has been rectified with the spending of over IR£1mn. in upgrading it. It now carries two lanes of traffic and two footpaths while retaining its previous character.

4.4.3 Rail Access:
The rail access to Tralee is through Mallow and Killarney. Due to the circular nature of the journey from Limerick Junction to Tralee via Mallow and Killarney, and the inadequacy of the line which is slowly being upgraded from Mallow on, the section of the Dublin/Tralee journey from Limerick on takes a disproportionately long period of time. On top of that the older rolling stock used between Cork and Tralee does not provide an acceptable level of comfort.

A report published by Arthur D Little Consultants in May 1998 has pointed out that acceptable safety levels will be breached within two years on certain sections of railway track including the Mallow to Tralee line. Already speeds have been reduced to take account of the poor condition and age of the track. The visitor attraction

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managers in Tralee who depend on school tours from the greater Dublin area for a significant amount of business do not welcome this.

In the 1994/1999 National Development Plan the line was designated as a co-financed line and as a result secured EU funding. This involves the spending of IR£15mn. on the relaying of 50 miles of track and the replacement of the signalling system. This budget is inadequate at present costing since it now costs approximately IR£25mn. to relay 50 miles of track. There is also investment in rolling stock and hopefully the older rolling stock will no longer be required.

4.4.4 Bus Access:

Over the last eight or nine years Bus Eireann improved its links to Dublin, Cork, the West of Ireland and Rosslare. Its services tend to interlink better now also. It has four services per day to Dublin, and five on a Friday. It has developed services geared towards the tourist and for four months of the year operates two trips a day around the Ring of Kerry. It services Dingle and Slea Head. The Cliffs of Moher are also accessible as is West Cork as far as Skibbereen. Bus Eireann is in fact trying to encourage people to treat Tralee as a destination and to use it as a base from which to travel to other areas. It operates 'rambler' tickets too. The bus only rambler for three days is £28, for eight days is £68 and for fifteen days is £98, unlimited mileage.

On the negative side bus users are unhappy with the inadequate seating in the waiting room of the station. Indeed many visitors highlighted it as a bad aspect of their trip to Tralee and so the situation should be rectified given that it seems to have left a lasting impression.

4.4.5 Sea Access:

Essentially there is no sea access to the Tralee area. The nearest port for an overseas passenger ferry is Cork, which caters for the Cork/Swansea route, and Cork/France. This is a two-hour car drive away.
4.4.6 Air Access:

Kerry County Airport is located at Farranfore, which is 16 kilometres from Tralee. At present it has a twice daily service to Dublin with Aer Lingus and a once daily service to London (Stansted) with RyanAir. Figure 4.4 gives an indication of the passenger numbers through the airport since 1991.

Figure 4.5


The numbers dropped significantly with the withdrawal of RyanAir in 1993 and Manx Airlines filled the breach on the London route through Luton Airport. After 1993 there was massive growth in passenger throughput with an almost six-fold increase in four years. In 1997 RyanAir returned and now have direct flights from Kerry to Stansted, London. However, in February 1998 Manx Airlines ceased their service citing severe competition as the main reason for their withdrawal. RyanAir will be flying in and out of Kerry Airport twice daily from mid-July 1998. A priority for the company, which it has failed to achieve to date, is the establishment of a third Kerry-Dublin daily service, a route presently serviced by Aer Lingus.
In its financial year ending October 1997 the Kerry Airport plc found itself in a break-even situation\(^{47}\) (profit / revenue = \(<\frac{1}{2}\%\)) which was well back on the previous year. This was mainly due to the commissioning of new routes and a decline in charter business. The most significant threat it faces now is the abolition of Duty Free shopping. Ireland has applied for derogation but if Duty Free retailing is removed then Kerry Airport's commercial activities will be severely curtailed as revenue from fuel and shopping was over IR£0.5mn. in the financial year ended in 1997.

Chapter 5

Research Methodology

5.1 Introduction:

The methodology used in this study combines quantitative and qualitative data collection procedures. This triangulation, a term borrowed from navigational and military strategy by Denzin\(^48\), is based on the assumption that any bias inherent in data sources, investigator, or method would be neutralised when used in conjunction with other sources, investigators and methods. In this way it seeks convergence of results. It offers complimentarity through overlapping and the emergence of different aspects of the topic under research. It aids the development of the overall research when the different strands are carried out sequentially such that the first helps to inform the second. It adds scope and breadth to the study that would not be possible otherwise.\(^49\)

This study involved survey research of tourist accommodation providers in the Tralee area and tourists visiting the town. These surveys were carried out simultaneously. After the analysis of this data a focus group interview was set up to gather more in-depth information relating to specific issues, some of which were highlighted by the survey data-collection.

5.2 Primary Quantitative Research:

5.2.1 Questionnaire Survey:

A questionnaire survey is a means of eliciting data of a quantitative or numeric nature from a representative sample of the population through asking questions of people.


The data enables the researcher to generalise the findings from the sample to the overall population.\textsuperscript{50} The sample is based upon statistical probability theory whereby it is possible to ascertain the extent to which the sample being interviewed is representative of the population. A simple rule of thumb is that the bigger the sample size, the more accurate the sample will be. The greater the randomness, the more representative the sample is of the given population.

It is inductive in that particular aspects are examined and theories are derived from the resultant data. Questionnaires lend themselves to establishing causality as an explanation for certain behaviour: for example, the variation of a tourist's choosing water-based activities with their nationality. Although individuals are interviewed in isolation from each other, the focus of the survey is more on the statistical profiles and the patterns and characteristics of the given population.

5.2.2 Advantages of Questionnaire Surveys:

- In contrast to a complete enumeration of the population, it provides a relatively inexpensive way of discovering characteristics of the population under investigation.
- There is less work involved in the collection and analysis of the data.
- Time is saved since a sample is quicker to analyse and process.
- Due to pilot-testing and resulting redesign it may lead to higher levels of accuracy in the final data.
- Smaller numbers of interviewers are easier to train and monitor.
- Fewer cases allow for the analysis of more elaborate information on each\textsuperscript{51}.

\textsuperscript{50}Creswell, J. W., 1994, Research Design: Qualitative and Quantitative Approaches, Sage, London.
5.2.3 Critique of Questionnaire Surveys:

- Standardisation can be difficult to achieve in the administration of the questionnaire. It includes not just the specific questions but also the manner of asking them and how the replies are noted.

- The idea of causality is not applicable to the realm of human actions which is rule-following and not 'caused'. A tourist's country of origin does not cause that person to partake, or not partake, in water-based activities. The two variables may vary together but the correlation does not infer that one causes a change in the other.

- The design of the questionnaire in itself has decided on what issues are of importance and so the method is guided by the researcher's presuppositions. It is something of a 'no-win' situation since the standardisation that is necessary for accuracy disallows interviewees the opportunity to challenge ideas on their own terms.

- A broad spectrum of answers is compartmentalised into fixed categories, which are incapable of reflecting their diversity, and this occurs at a specific point in time.

- The lack of opportunity for dialogue makes it more difficult for the survey researcher to guarantee that the questions are being interpreted by the interviewee in the manner which was intended, and more so when the researcher and the interviewee do not share the same cultural background or first language.

- There is generally a large discrepancy between what people say they do and what they actually do\(^{52}\).

5.2.4 Self-completion Questionnaires:

This format was used in the survey of accommodation providers in Tralee. The self-completion questionnaires have the added advantages of being inexpensive, people

take their own time to complete them and interviewer bias is lessened. On the other hand, questions have to be simple and straightforward to minimise misinterpretation, probing beyond the given answer is not possible and there is no control over who answers the questionnaire\(^{53}\). A covering letter, which explained the purpose of the questionnaire along with the need for co-operation, is enclosed with the questionnaire. The anonymity of the responses is also stressed.

5.2.5 Face-to-face Questionnaire Interview:
This format was used in gathering data from tourists visiting Tralee. The interviewers have a great deal of potential in influencing the quality of the data that they collect through this format\(^{54}\) so it is important that they ask the questions in a clear, standardised and concise way. Other roles that they have include locating and securing the co-operation of the respondents, motivating and guiding the respondent through the questions and recording the answers accurately while maintaining a rapport with the interviewee. This form has the advantages of a high response rate with greater control of the interview situation but it can be quite slow.

5.2.6 Rationale for Data-Collection Procedure:
The main reasons for deciding on questionnaire surveys to be used to gather information was that the geographic area under investigation is manageable and costs could be minimised by the availability of students from the Government-backed students' summer work scheme. Also, there is a dearth of this kind of information in the area for the implementation of decisions based on timely and reliable knowledge regarding the populations that will be impacted by the decisions.


5.2.7 Application of Questionnaire Surveys in this Study:

Both the questionnaires for the accommodation providers and those for the tourists included classification, factual and opinion questions. Open and closed questions were also utilised. The classification questions are mainly closed while many of the opinion questions are either Likert-scale or open. In many instances an open question is used as a follow-up to a closed question, e.g., 'are you satisfied with service provided by bank? (yes or no) - if no, please state why.' Every effort was made to ensure that the closed questions were both mutually exclusive and exhaustive. The attitude continuum and radicalism of the respondents is measured by using the Likert-scale questions.

5.2.7.1 Survey of Accommodation Providers:

The first questionnaire survey was administered to tourist accommodation providers in Tralee (Appendices A and B). The reason that the accommodation base was chosen for the survey as opposed to other areas of the tourism industry is that it is a sector that accounts for a large number of people who profit directly from tourism and who are generally well informed due to their vested interest. The survey is cross-sectional since the information was collected at one point in time. The questionnaires along with a covering letter were hand-delivered to the accommodation providers for self-completion to be collected approximately one week later. The premises were revisited up to three times if not collected and on the third revisit if the questionnaire was not complete these people were given a stamped, addressed envelope.

Six hotels, forty-one guesthouses, and two hostels returned completed questionnaires in this survey, which was administered in July 1997. This sample was based on blanket coverage of guesthouses, hotels and hostels and so it is a non-random sample. A 67% response rate was achieved from hotels and an estimated 70% rate from guesthouses and hostels. The accuracy of the latter percentage depends on the number of unapproved guesthouse accommodations which can only be approximated (a level of 20% unapproved was estimated). Guesthouses in rural areas were not included. The
objective of this questionnaire is to collect information and views from as many accommodation providers as possible in the Tralee area. Analysis of the findings helps to establish the present state of tourism in the locality from the perspective of local suppliers to the industry.

In the pre-testing it was found that a small percentage of respondents had omissions in a Likert-scale question due to the exclusion of the response category equating to fair or adequate (i.e., the central position). A redraft of the question eliminated this problem. Another problem arose in open-ended questions. These questions revealed simplistic, vague responses from some respondents. However, it must be stated that these questions were among the most useful in terms of providing valuable information and were understood by all respondents.

5.2.7.2 Survey of Tourists in Tralee:

No current tourism profile of Tralee could be concluded without including the profile of the tourists who visit the area. Their opinions, along with their demographics, provide the most appropriate basis for marketing decisions. Any future initiatives in Tralee should only be undertaken when informed from this source.

During July and August 1997, tourists in the Tralee area helped in filling out questionnaires (Appendix C) in face-to-face interviews for a cross-sectional survey. The aim of the questionnaire survey was to illicit information and opinions from a sample of the tourists visiting Tralee, reflecting the demographics and views of all tourists visiting the area. The questionnaires were administered by three field-workers, mainly in the central streets of Tralee relatively close to visitor attractions and also at venues such as the train station. In an effort to make the sample as representative as possible the interviewers were advised to ask all passers-by whether or not they were tourists. This was to remove the perception that 'foreign national = tourist' which would have introduced a serious bias on the results. Using this system the study team
succeeded in interviewing a total of 290 tourists. A larger sample size would have lent itself to a more accurate reflection of the demographics, activities and opinions of all tourists visiting the area. However, in view of the fact that the research was also adopting a qualitative dimension and within the limits of resources and time available, this size of sample return was adjudged adequate.

Between the pilot test that was carried out on a sample of ten tourists and the final drafting of the questionnaire a number of minor changes were made. One related to the age groupings where the age bands were changed to make them compatible with the C.S.O. statistics. Another related to 'Scandinavia' in Question 1 that dealt with the country of residence of visitors. This was changed to 'Other Scandinavian' to allow for the possibility that Swedish visitors could already have answered as 'Other EU'.

One of the more obvious difficulties to arise from the size of the sample is that numbers in some sub-groups tend to be small. In such cases, the findings are more indicative than conclusive. The qualitative data mitigates this problem to an extent by acting as a crosscheck on the findings and gives reassurance in terms of the direction of the findings. The field-workers believed that a minority of the European visitors had difficulty in understanding some of the questions and the danger of bias introduced due to the necessary elaboration were better than a non-response.

While every effort was made to ensure randomness in the administration of the questionnaires, it was not possible to maintain total scientific rigor. Therefore the information drawn from the results are the conclusions of 290 tourists who were in the Tralee area and were willing to be interviewed. It is a true record of their views and it is probably representative of the tourists that visited Tralee in the summer of 1997.
In the three stages of rough drafting, pre-testing and final questionnaire design it was important to achieve a balance between the inclusion of more obviously relevant questions, e.g., accommodation and activities of the tourists, and more general questions which help to give a more complete picture of the tourism environment of the town, for instance, the good and bad aspects. Another consideration was the order and sense of progression of the questionnaire. The questions in the last section are especially beneficial in formulating cross tabulations that help in identifying target markets and in market segmentation.

5.3 Primary Qualitative Research:

5.3.1 Focus Group Interview:
To obtain primary qualitative data the focus group interviewing technique was selected. Focus groups are an under utilised means of collecting data in the tourism field, where there is still a strong emphasis on quantitative techniques. A focus group is an interview style developed for small groups generally consisting of six to ten participants. The objective is to create a free flowing discussion addressing a particular topic of interest or relevance to the group and the researcher. It is typically under the guidance of a facilitator, usually referred to as the moderator. This person's task is to draw out information from the participants that could prove important to the research topic under investigation. Focus groups have the potential to be very dynamic, with interactions in the group stimulating discussion due to one participant reacting to the comments made by another. This has been described by Stewart and Shamdasani as a "synergistic group effect". It is this synergy which has the potential to lead to a broader spectrum of ideas, issues, and even solutions that

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differentiates the focus group interview from the more conventional styles of one-on-one interviews.

Given the perceived benefits of the focus group one wonders why it is a relatively new addition to the realm of investigative research. In actual fact it is not new. For hundreds of years anthropologists have conducted group interviews around tribal campfires. These were not called focus groups but they were based on similar tenets. For market researchers focus group interviews are the predominant form of qualitative research.

5.3.2 **Advantages of Focus Group Interviews:**

- Like face-to-face interviewing, focus group interviews allow access to the substantive content of the participants' views. However, it also allows for the observation of the interactions between the members of the group as they share specific attitudes and experiences relating to the topic set out for discussion.
- Many of the added benefits of the focus group spring from group dynamics, since opinions and views obtained are wider than they would be from an individual.
- There is security in numbers, it facilitates debate and single comments fire further discussion.
- The input of the moderator is much less than the interviewer in one-on-one interviews and consequently this has the advantages of greater emphasis being given to the participants' viewpoints and the decrease in the level of interviewer bias.
- The synergy of the focus group can be a source of quality research and allows for a comprehensive understanding of the topic being examined.
- In many instances focus group interviews are less expensive and less time-consuming than individual interviews.

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5.3.3 Critique of Focus Group Interviews:

- Focus group interviews produce less data than individual interviews. In a controlled experiment Fern\textsuperscript{61} found that group interviews provided about 70\% as many original ideas as the individual interviews.

- Focus group data tends to make participants views more extreme when compared with the replies given in questionnaire surveys.

- As a data-collection strategy it is of necessity intentional and invasive when compared with unobtrusive measures.

5.3.4 Rationale for using Focus Group Interview:

The focus group interview enhances the overall study by adding another tier of primary research to the issue being investigated. This presents the advantages of corroboration of other data and insights into areas that are otherwise not illuminated. It is deemed to be appropriate in gathering information relating to the central research questions. This data was not likely to be obtained through the quantitative techniques. The best data is obtained when time and cost effectiveness are taken into account.

5.3.5 Application of Focus Group Interview in this Study:

Before setting up the focus group meeting it was necessary to assess its potential value to the study and so the possible issues that could be dealt with were clarified. Some of the central research questions to be debated related to tourism development, partnership, the labour force, community involvement and sustainability. Many of these topics had not been highlighted in the other data collected. It was decided that the focus group would be undertaken without focus questions but rather that the moderator would be given guidelines regarding what the discussion should cover in the two hours allowed for it.

\textsuperscript{61}Fern, E. F., 1983, Focus groups: A review of some contradictory evidence, implications, and suggestions for future research. \textit{Advances in Consumer Research} 10.
An independent facilitator was chosen who has an established record in leading partnership group meetings. This allowed the author to sit in as a research assistant, observe the group, create field notes regarding the group dynamics and ensure that the audio recording of the discussion went smoothly.

A number of people were chosen for the meeting to discuss tourism in the Tralee area. These individuals were representative of a broad cross-section of those with either a direct or an indirect interest in tourism. Their backgrounds included visitor attractions, education, self-catering accommodation, regional tourism organisation, local business organisation, catering, state transport, hotel, social disadvantage and enterprise development. A conscious effort was made to address the male-female balance among the members of the group. Each participant was contacted by telephone and the majority were in a position to give an immediate commitment to attend. This excellent response was much welcomed, especially since it had not been expected due to peoples' business commitments. A notable non-attendee was a representative from the County or Urban Councils who were unavailable at the time. As an incentive to come the participants were invited to a complimentary lunch following the meeting, compliments of the Institute of Technology, Tralee.

The meeting was successful in highlighting views that had not been noted previously along with a reiteration of earlier findings. The moderator ensured the involvement of all participants, encouraging those who were more reticent but encountered difficulty in controlling a dominant respondent. Another drawback was that the meeting did not achieve a conversational level to any large degree and so the participants were more careful regarding the views that they were expressing than one would have wished. The fact that the group was not chosen randomly means that it cannot be said to be representative of the views of all tourism interests in the Tralee area. The participants themselves expressed the view that they found it a useful exercise in networking and
facilitating greater partnership within the local tourism industry and with other interested parties.

The main themes of the discussion are illustrated with direct quotations from the group members and are set out in Chapters 7 and 8. The quotations are not all direct responses to questions but were generated through the group discussion. For continuity and ease of reading the quotations have been grouped according to topic and theme and presented under the appropriate heading. The discussion was allowed to flow as opposed to being closely directed.
Chapter 6

Current Tourism Profile of Tralee

6.1 Organisations Profile :

6.1.1 Tralee Task Force :

In Tralee there are a number of organisations which have responsibility for different aspects of tourism, and to varying degrees. The fact that tourism has made such advances in the town over the last six years is due in no small part to the efforts of the Tralee Task Force. This group was formed in early 1992 to pinpoint possible avenues for new developments due to rising levels of unemployment. It is made up of local business people and representatives of Tralee Urban District Council and Shannon Development. Tourism was an obvious choice due to recent attractions that had been put in place and the town’s proximity to some of the country’s finest natural scenery. The group set a target for themselves of creating extra tourism spending of IR£50mn. per annum in the town, on top of the IR£250mn. per annum that was anticipated by the year 2000.

The group carried out some fund-raising and with the proceeds commissioned a number of studies, including a visual environmental report by an architect, Stephen Newell, and another study prepared by the UK-based Ventures Consultancy Ltd. (of which Victor Middleton is a director). This latter study helped to identify strategic projects that would be needed to accelerate expansion in tourism. These studies were incorporated into a planning report 'Tralee 2000' which laid down a strategy for the town. The main thrust of the strategy was to invigorate product development, expand the accommodation base and market the town as a visitor destination.
By 1995 this was progressing well towards its achievement and so 'Tralee 2000: The Next Phase' was introduced. The principal impetus then became the enlargement of the geographical area to be developed so that Fenit, Ardfert and Blennerville were now included. The background to this was that Tralee had traditionally been linked to the sea, being a coastal town and the potential attached to this remained untapped. Projects were planned for the broader area, which involved the investment of approximately IR£100mn. over the five-year period from 1995 to 2000 with a 50/50 split between public and private funding. About two-thirds of the investment is targeted at the town itself with the remainder aimed at the Lee Valley, the Canal and Basin, and the other outlying areas. These projects are well under-way at this point in time.

The Task Force is at present examining the options for the third phase of tourism development up to the year 2005. Again this involves UK consultants visiting the area and listening to their suggestions. When all information and advice has been gleaned the optimal progression route will be agreed and acted upon.

6.1.2 Tralee Chamber of Commerce and Industry:

The Tralee Chamber is one of fifty-four throughout Ireland. It represents business interests in Tralee, be they professional, commercial, industrial or trading, and includes statutory membership as well as the private sector.

In the early 1990's a panel system was introduced and one of these is a Tourism Panel. Its main objective is to turn Tralee into a nationally and internationally recognised tourist destination. The ways in which it helps to accomplish this is by supporting new product initiatives through fund-raising and co-operation, promotion of ventures which help disperse the tourists to off-peak periods, and overall promotion of tourism in co-ordination with others.

6.1.3 Shannon Free Airport Development Company:

This is the economic development agency for the Mid-west region. As previously communicated it took over the duty of developing tourism in the region in 1988 and also has responsibility for the development of industry in the region and the expansion of traffic through Shannon Airport.

It has a role of stimulating appropriate investment by being the grant-aiding agency for most of the public funds going into tourism in the region.

Table 6.1

<table>
<thead>
<tr>
<th>Projects</th>
<th>IR£</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tralee Aqua Dome</td>
<td>3,200,000</td>
</tr>
<tr>
<td>Kerry the Kingdom</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Tralee Emigration Research Centre</td>
<td>223,000</td>
</tr>
<tr>
<td>Tralee Caravan Park</td>
<td>200,000</td>
</tr>
<tr>
<td>Tralee/Blennerville Steam Train</td>
<td>150,000</td>
</tr>
<tr>
<td>Blennerville Windmill Centre</td>
<td>62,000</td>
</tr>
<tr>
<td>Tralee Golf Club</td>
<td>18,000</td>
</tr>
<tr>
<td>Signposting – Tralee</td>
<td>15,987</td>
</tr>
<tr>
<td>Fenit Sea World</td>
<td>160,000</td>
</tr>
<tr>
<td>Fenit Marina</td>
<td>50,000</td>
</tr>
<tr>
<td>Celtic Sea Angling</td>
<td>21,780</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>5,100,767</strong></td>
</tr>
</tbody>
</table>

Source: Shannon Development - direct communication received spring, 1998.

Table 6.1 highlights the emphasis that is placed on the Aqua Dome as a flagship project for Tralee, having received over 60% of the European Regional Development
Funds support that was expended in the area. At year-end 1996 Shannon Development also held an investment of IR£150,000 in the Jeanie Johnston Project. The Tralee Caravan Park will be the second such park in the area and is opening for the 1998 summer season. Its location was recommended for this use by Ventures Consultancy in their Lee Valley Development proposals.

Shannon Development provides many services for visitors to the area through the Tourist Information Office and its Offices and Information Points in other parts of the region. These help the visitor to secure accommodation and to find out what the location has to offer.

It is an excellent example of working in partnership with the local authorities and tourism interests, although it does not see a role for those who are socially marginalised within these partnerships.

Quality and value for money have been a priority of the Company for the last decade but it is only in very recent times that it has made a token gesture towards sustainable development and so has some catching up to do in this respect. An issue that it will have to address in the short term is the fact that maximising the flow of visitors through Shannon Airport may not be compatible with sustainability, and so two major parts of its remit would be in conflict with each other.

Shannon Development is one of the scarce collectors of market intelligence in the region, which is so important in the formulation of enlightened decisions.
Its role in promotion of the region includes overseas staff in Germany, France and the U.S., and participation in trade shows in Belfast, Cork and Dublin.

In looking to the future Shannon Development realises that there is a need for a shift in perspective from reliance on grant aid to the identification of market-led and commercially sustainable projects. Therefore it sees a need for assisting tourism product investors with product development and marketing expertise.

6.1.4 County Enterprise Board:

In 1993 the Government set up County Enterprise Boards throughout the country. The one in Tralee covers the county of Kerry. Its introduction was aimed at filling a void that was apparent regarding small-scale enterprise at local level. The Board is supported by the European Union and the Department of Enterprise and Employment under the Operational Programme for Local Urban and Rural Development 1994-1999.

Its main role is the provision of support, financial or other, for projects that would create jobs and to encourage enterprise. The grants are once off and a firm that receives one is expected to achieve a sustainable level of economic viability as a result. The exception to this would be feasibility studies, which are eligible for funding also. The Enterprise Board is also expected to heighten an awareness and culture of enterprise in the county and act as an umbrella group in planning enterprise development.

From 1993 to the end of 1995 the Board had approved 211 projects for grant aid of IR£1.6mn. Of these projects 41 were tourism related and benefited to the tune of IR£0.5mn. Almost half of these were in the Tralee area.

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6.1.5 Festival of Kerry Committee:

The Festival of Kerry Committee runs the International Rose of Tralee Festival. The Festival began as a carnival to help boost tourism in the area over forty years ago. Today the Committee has thirty centres in different countries around the world which are maintained through various branches of the Kerry Association and other groups of individuals and the general membership consists of over seventy people.

The main task of the Committee is the pursuing of sponsorship since it is an expensive festival to host and there is a substantial amount of free entertainment available while it is taking place. The main form of promotion is through brochures that are distributed to the tourist offices around Ireland and to its overseas centres. Media advertising is embarked upon shortly before the festival in August.

6.1.6 Holiday Tralee Ltd.:

This was formed by Tralee Task Force with the objective of marketing Tralee as a destination. So far its only role has been in advertising. The logic behind it is that the tourism interests will achieve more business by advertising the town than they would by advertising their own businesses. Holiday Tralee had two full-time employees, and this was scaled back to one in 1997. In reality there were a small number of tourism businesses in the town carrying the costs of running it, and the difficulty that they were having was that it was consuming £15,000 a year, but a disproportionate amount of that was spent on office administration and carrying costs.

Holiday Tralee is now concentrating on the principal holiday fairs as well as supermarket and shopping centre based promotions in Cork and Dublin predominantly.
6.2 Product Profile:

6.2.1 Attractions:

6.2.1.1 Gate-way to the Dingle Peninsula:
The primary attraction that Tralee has to offer is its location as the Gateway to the Dingle Peninsula, which incorporates the Connor Pass, Slea Head, the Blasket Islands and other scenic areas of outstanding natural beauty. Tralee is also suitably located for sightseeing on the Ring of Kerry and the Lakes of Killarney although Killarney town is the preferred base for tourists undertaking these tours. Some of Ireland's finest blue-flag beaches are within a short driving distance, such as Banna, Ballyheigue and Ballybunion.

6.2.1.2 Siamsa Tire:
The progress that has been achieved in Tralee in the area of man-made visitor attractions over the last decade is exemplary and is a credit to those who instigated the drive and saw it through. Some of these attractions have been in Tralee for more than ten years but have been revamped and are now at international standard.

Trawlee is home to a National Folk Theatre, Siamsa Tire, which is acclaimed in quality and status. In the late 1980s it was given a new home in a purpose-built auditorium which is similar in shape to a ring fort. It presents a number of shows six nights a week during the summer season. It is unique to Tralee and is an excellent medium for communicating Irish culture, and had its own derivation in the need to conserve elements of this culture that would be invariably lost otherwise.

The main drawback associated with it at present is that the numbers which attend have the potential to be dramatically increased, but this cannot occur unless there are more performances, the theatre is expanded, or a different form of communicating folk
heritage is sought, e.g., one which is more interactive and timetabled throughout the day. There is also a need for a display to highlight its own source, and reiterate that it is not just culture that is well packaged for tourists but part of our national heritage which is gladly nurtured and shared.

6.2.1.3 Geraldine Experience:
The Geraldine Experience is recognised as being equal to the best in Ireland, given its intimate and insightful nature. It features a journey by time car through the medieval streets and houses of Geraldine Tralee. It is located in the Ashe Memorial Hall in Denny Street that was once the Kerry County Hall, along with Kerry the Kingdom Museum. Kerry's history and heritage is presented in a way that utilises life-size models and interactive media. The Ashe Memorial Hall also houses the Tourist Information Office.

6.2.1.4 Tralee Aquadome:
The Tralee Aquadome is a major water-related development that is proving very popular with the domestic family holiday market. It is the largest indoor water world in Ireland and features include a free form leisure pool, a water slide, a programmed wave machine, a fast or slow river, a sauna area, a jacuzzi and a restaurant. It opened early in 1994 and in its first three years it averaged 214,000 attendances annually. The Tralee Task Force saw the Aquadome as the primary 'flagship' project needed to reach a critical mass and as a result become an established tourism destination65.

6.2.1.5 Blennerville Windmill and Visitor Centre:
Blennerville Windmill and Visitor Centre has its strength in that the windmill is the largest working windmill in the UK and Blennerville was an emigrant port during the Great Famine in the mid-1800's. The displays here would seem deficient if the visitor had previously called to Kerry the Kingdom. At present a replica of the sailing ship the Jeanie Johnston is being built and when it is completed it will complement the heritage

package in Tralee. The original was owned by Donovans of Tralee and was used in the importation of corn and timber from Quebec in Canada. On the return journey it was used as an emigrant vessel, and the approximately 200 emigrants on board served the dual purpose of paying their fares and providing ballast. While many coffin-ships sailed at that time, it is believed that the Jeanie Johnston never lost a passenger to the sea.

It is also symbolic of the trend in Tralee Task Force's development plan. In the 20th century the town somehow became extricated from the sea and from a tourism point of view it would be of great benefit if these links were re-engaged. The launching of the new Jeanie Johnston on its maiden voyage probably in the year 2,000, although very costly due to the production of a seaworthy vessel which measures up to today's safety and legal standards, will also be the relaunching of Tralee as a recognised port. The Lee Valley Development Proposals favoured a non-sailing replica ship which would show massive cost reductions and allow more usable space but the sense of occasion and marketing potential of the voyages would be foregone. A marvellous opportunity would have been missed and the old cliché still holds true - "A ship is always safe in the port but that's not what they're built for!"

6.2.1.6 Tralee Steam Railway:
The Tralee Steam Railway adjoins the Aqua Dome and runs to Blennerville Windmill and Craft Centre. No doubt it is a fitting development but has lacked imagination in its implementation and so needs more features to make it more appealing and attractive. Also there is little in the way of diversion for the tourist who is awaiting the train at either end of the track.

6.2.1.7 Other Attractions:
There are many other attractions in the area and these include Fenit Sea World, the Kingdom Greyhound Stadium, Tralee Horse Racing Meetings, the Bowling Centre,

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Go-Karting, Omniplex Cinema, Tralee Sport and Leisure Centre, the Golf Course and "Jungle Jim's" children's indoor play area.

6.2.2 Attendances at Attractions:
Table 6.2 sets out the attendances at a number of the attractions in Tralee over the last seven years. Substantial growth was recorded in the early years as new projects came on board but this has levelled off in recent years.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>B'lnerville Windmill</td>
<td>30,500</td>
<td>45,500</td>
<td>46,200</td>
<td>49,000</td>
<td>46,200</td>
<td>40,000</td>
<td>38,400</td>
</tr>
<tr>
<td>Siamsa Tire</td>
<td>38,500</td>
<td>60,300</td>
<td>69,000</td>
<td>71,100</td>
<td>74,500*</td>
<td>77,900</td>
<td>76,200</td>
</tr>
<tr>
<td>Kerry the Kingdom</td>
<td>37,400</td>
<td>70,100</td>
<td>97,000</td>
<td>97,200</td>
<td>103,600</td>
<td>102,200</td>
<td>109,400</td>
</tr>
<tr>
<td>Steam Train</td>
<td>-</td>
<td>-</td>
<td>35,000</td>
<td>46,000</td>
<td>41,100</td>
<td>35,600</td>
<td>33,400</td>
</tr>
<tr>
<td>Aqua Dome</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>196,000</td>
<td>230,000</td>
<td>216,000</td>
<td>**</td>
</tr>
<tr>
<td>Total</td>
<td>106,400</td>
<td>175,900</td>
<td>247,200</td>
<td>459,300</td>
<td>495,400</td>
<td>471,700</td>
<td></td>
</tr>
</tbody>
</table>

Source: The individual attractions - direct communication.

* 1995 attendance figure for Siamsa Tire not available and so estimated.

** 1997 attendance figure for the Aquadome will not be made available until published.

The overall impression is that if the trend in numbers visiting the Aquadome continues, the attendances at attractions have peaked and are beginning a downward slide.

6.3 Festival of Kerry:

Kerry is known for many festivals that are held annually but none are of the same endowment as the Festival of Kerry, otherwise known as the International Rose of Tralee Festival, which the town hosts for a week during the month of August. It is
seen by many as a homecoming festival with many emigrants from the area returning for its duration. In fact while it is an international festival its appeal is significantly local. The highlights of the festival are the street entertainment and pub atmosphere, the town park extravaganza, the Saturday night parade and of course the Rose selection.

The concept of the Rose of Tralee has dynamic potential as a marketing tool because at present it is probably the strongest mental association that non-locals have with the area. The Festival receives national and international television and other media coverage through which it has a high international profile. Yet if one was to visit the town at any time other than when the festival is actually taking place, there is little to give the impression that this is the home of the Rose of Tralee. It is surprising that local tourism businesses have not made the 'Rose' into a strong brand image for the area.

6.4 Accommodation Base in Tralee:

<table>
<thead>
<tr>
<th>Form of Accommodation</th>
<th>1992</th>
<th>1997</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>381</td>
<td>681</td>
<td>+78.7</td>
</tr>
<tr>
<td>Town/Country/Farm/Guest house</td>
<td>288</td>
<td>351</td>
<td>+21.9</td>
</tr>
<tr>
<td>Self Catering</td>
<td>94</td>
<td>400</td>
<td>+325.5</td>
</tr>
<tr>
<td>Total Rooms</td>
<td>763</td>
<td>1,446</td>
<td>+89.5</td>
</tr>
<tr>
<td>Hostels (beds)</td>
<td>16</td>
<td>364</td>
<td>+2,175</td>
</tr>
</tbody>
</table>

Table 6.3 Rooms available in Tralee, 1992 and 1997.

Source: Shannon Development - based on accommodations within a five-mile radius of the centre of the town.
Table 6.4

<table>
<thead>
<tr>
<th>Hotels</th>
<th>Grade</th>
<th>No. of Rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brandon</td>
<td>***</td>
<td>185</td>
</tr>
<tr>
<td>Brandon Court</td>
<td>***</td>
<td>45</td>
</tr>
<tr>
<td>Abbeygate</td>
<td>***</td>
<td>100</td>
</tr>
<tr>
<td>Ballyseedy Castle</td>
<td>***</td>
<td>12</td>
</tr>
<tr>
<td>Earl of Desmond</td>
<td>***</td>
<td>165</td>
</tr>
<tr>
<td>Grand</td>
<td>***</td>
<td>44</td>
</tr>
<tr>
<td>Tralee Court</td>
<td>***</td>
<td>45</td>
</tr>
<tr>
<td>Ballygarry House</td>
<td>**</td>
<td>16</td>
</tr>
<tr>
<td>Imperial</td>
<td>**</td>
<td>30</td>
</tr>
<tr>
<td>Horans</td>
<td>*</td>
<td>12</td>
</tr>
<tr>
<td>Meadowlands</td>
<td>N/A</td>
<td>27</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>681</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Guest Houses</th>
<th>Grade</th>
<th>No. of Rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>****</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>***</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>**</td>
<td>5</td>
</tr>
<tr>
<td>Town House</td>
<td></td>
<td>124</td>
</tr>
<tr>
<td>Country Home</td>
<td></td>
<td>138</td>
</tr>
<tr>
<td>Farm House</td>
<td></td>
<td>31</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>309</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Self Catering</th>
<th>Grade</th>
<th>No. of Rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>****</td>
<td>114</td>
</tr>
<tr>
<td></td>
<td>***</td>
<td>79</td>
</tr>
<tr>
<td></td>
<td>**</td>
<td>118</td>
</tr>
<tr>
<td></td>
<td>*</td>
<td>2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>313</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hostels</th>
<th>Grade</th>
<th>No. of Rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(5 Premises)</td>
<td>404</td>
</tr>
<tr>
<td>Caravan / Camping</td>
<td>(1 Site)</td>
<td></td>
</tr>
<tr>
<td><strong>Total Rooms</strong></td>
<td></td>
<td><strong>1,707</strong></td>
</tr>
</tbody>
</table>

Source: Bord Failte Accommodation Guides, 1998 and direct communication with hotels.
The accommodation base in Tralee doubled over the five years from 1992-1997, with two thirds of the increase occurring over the period 1995-1997. The growth was most significant in the self-catering and hostels sectors.

The town does not have a 5* or a 4* hotel. The Brandon Hotel is presently making strides towards, and hopes to achieve, 4* status. This along with its conference centre, which will accommodate up to 1,500 delegates will prove to be major assets to the accommodation base in the town.

6.5 Findings of the Accommodation Sector Survey in Tralee:

6.5.1 Type of Business:

<table>
<thead>
<tr>
<th>Table 6.5</th>
<th>Type of Business.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Guest House / Hostel</td>
</tr>
<tr>
<td></td>
<td>No.</td>
</tr>
<tr>
<td>Sole Trader</td>
<td>10</td>
</tr>
<tr>
<td>Private Limited Company</td>
<td>1</td>
</tr>
<tr>
<td>Family</td>
<td>28</td>
</tr>
<tr>
<td>Partnership</td>
<td>1</td>
</tr>
<tr>
<td>Missing</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>43</td>
</tr>
</tbody>
</table>

6.5.2 How Long in Existence:

Three of the hotels are in existence between 11 and 50 years, one for over 50 years and two have come into existence over the last 10 years.
6.5.3 Open for Business:
All hotels are open for business all-year round.

While 44% of Guesthouses are open full-time, the average overall is 8.8 months open.
6.5.4 Commercial, Private or Tour Business:

For guesthouses, it was found that 17% of their overall business was commercial, 3% tour and the remaining 80% private. It is worth noting that over 60% of the commercial business was with 20% of the respondents, and tours were catered for by approximately 13%.

80% of hotels accommodated tours, while tours averaged 55% of their business.

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Figure 6.3

Commercial, Private or Tour - Guest houses / Hostels.

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6.5.5 Number of Sleepers:

The 6 hotels interviewed could accommodate 1,112 sleepers, with an average of 185. The standard deviation, however, is quite high at 142.8.

Since the number of hostels included is so small, their numbers are not being included here separately due to the threat to their confidentiality. Therefore guest houses only
had an average of less than 4 double beds and 2 single beds each. Two thirds of them had either 3 or 4 double beds and over half of them had 1 to 3 single beds. All forms of accommodation together could accommodate 1,649 sleepers.

6.5.6 Occupancy:

Given that the occupancy rate and the number of sleepers for guesthouses are available, it is possible to estimate the total number of sleepers they accommodated in the previous year. The average occupancy for January to April was less than 15%, for May to August over 58%, and for September to December, 24%. This means that the guest houses surveyed had an annual average occupancy of 32.3%, accommodating approximately 46,000 sleepers in a year, and if these guest houses are representative of the 30% who did not return the questionnaire, then the total number of visitors to the town that used guest house accommodation was almost 66,000.

Figure 6.4

Occupancy 1996 Season - Guest houses / Hostels.
6.5.7 Nationality of Guests:

Table 6.6
Nationality of Guests (%).

<table>
<thead>
<tr>
<th>Nationality</th>
<th>Guest house / Hostel</th>
<th>Hotel</th>
</tr>
</thead>
<tbody>
<tr>
<td>British</td>
<td>13.3</td>
<td>18.8</td>
</tr>
<tr>
<td>French</td>
<td>13.1</td>
<td>3.8</td>
</tr>
<tr>
<td>German</td>
<td>15.7</td>
<td>8.3</td>
</tr>
<tr>
<td>Irish</td>
<td>33.6</td>
<td>45.5</td>
</tr>
<tr>
<td>American</td>
<td>12.2</td>
<td>19.3</td>
</tr>
<tr>
<td>Other</td>
<td>12.1</td>
<td>4.3</td>
</tr>
</tbody>
</table>

100.0  100.0

Figure 6.5
Nationality of Guests - Guest houses / Hostels.
6.5.8 Employment:

On average, 27% of the revenue accumulated by hotels was paid out in wages.

**Full-time:**

The average full-time employment per hotel was 15 females and 18 males. Of these, just over 50% of males are under the age of 25, while this rises to 80% for females.

No guesthouse employed a male working full-time and just 14% employed a full-time female. 1 in 3 of these were aged under 25.

**Casual / Part-time / Seasonal:**

Half of the hotels that responded hired no staff on a casual basis. Of those that did, on average, 20 people were employed on this basis. Of these, 75% were female, and 85% were under the age of 25.

Large numbers were employed by the hotels on a seasonal basis, with females averaging 37 per hotel and males averaging 25. 89% of the females and 60% of males were aged under 25.
33% of guesthouses had someone employed on a part-time basis and 16% of them had more than one part-time employee. Just over 80% of these employees were under the age of 25, and 80% were female.

42% of guesthouses took on seasonal staff and 83% of these are female.

Increase / Decrease:
It was found that the last 3 years have been a time of high growth for hotels, with 80% of them increasing their employee numbers. No respondent registered a decrease in the number of employees over that period. 6% of guesthouses increased their employee numbers by less than 5 in the last 3 years with all others registering no change. Those that answered 'not applicable' are those that came into existence since 1994.

Table 6.7
Change in Employment Rate - 1994 to 1997.

<table>
<thead>
<tr>
<th>Increase / Decrease</th>
<th>Guest house / Hostel</th>
<th>Hotel</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No.</td>
<td>%</td>
</tr>
<tr>
<td>No Change</td>
<td>25</td>
<td>78</td>
</tr>
<tr>
<td>Increase &lt;5</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Increase 11 - 20</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Increase 50+</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Not Applicable</td>
<td>5</td>
<td>16</td>
</tr>
<tr>
<td>Missing</td>
<td>11</td>
<td>_</td>
</tr>
<tr>
<td>Totals</td>
<td>43</td>
<td>100</td>
</tr>
</tbody>
</table>
The methods of recruitment are very different depending on whether the accommodation is guesthouse / hostel or hotel. While personal contacts and family...
account for 80% of the recruitment in guesthouses, hotels tend to use C.V.'s and newspaper advertisements to recruit. This is understandable, given that the numbers required are much larger and personal contacts and family just could not provide sufficient recruits.

6.5.10 Languages:

<table>
<thead>
<tr>
<th>Language</th>
<th>Guest Houses / Hostels</th>
<th>Hotels</th>
</tr>
</thead>
<tbody>
<tr>
<td>French</td>
<td>27</td>
<td>100</td>
</tr>
<tr>
<td>German</td>
<td>20</td>
<td>83</td>
</tr>
<tr>
<td>Italian</td>
<td>3</td>
<td>33</td>
</tr>
<tr>
<td>Spanish</td>
<td>3</td>
<td>17</td>
</tr>
<tr>
<td>Other</td>
<td>7</td>
<td>0</td>
</tr>
</tbody>
</table>

In hotels, the number of employees that speak French averages 2.5, while in the guesthouses and hostels that have French-speaking staff, the average is 1.3.

For accommodations with German-speaking staff, hotels again average 2.5 but guesthouses have 1 in each case.

Just 2 hotels and 1 guesthouse have employees fluent in Italian, and 1 hotel and 1 guesthouse in Spanish.

Hotel staffs are not fluent in any other languages outside of those mentioned above.

6.5.11 Group Facilities, Entertainment and Leisure:

This section refers to hotels only. All hotels have facilities to cater for weddings and parties, and the majority of them could also cater for conferences. Only one has leisure facilities in-house, and these include a swimming pool and gym.
All hotels provide entertainment, which includes traditional music and/or cabaret.

6.5.12 Training:

Most hoteliers felt that the labour force was adequately trained, but thought that the 3-month basic skills course was too short and too general to be adequate.

35% of guesthouse owners thought that training was not adequate. Some of the drawbacks that they highlighted more than once were a lack of knowledge of the basic skills and an incorrect attitude. Other shortcomings expressed were a lack of practical training and the need for regular updating due to changing trends and markets.

All hotels had in-house training, provided either by their own personnel or by the Council for Education, Recruitment and Training for the Hotel, Catering and Tourism Industry (C.E.R.T.). Some offered incentives to their employees in the form of either part financing or study leave. The average cost of skills training for the hotels was £1,250 per annum.

When asked whether or not they were eligible for training grants, 6% of the accommodation providers surveyed stated that they were, with another 25% answering that they did not know, and the other 69% answering no. The first conclusion here is that either 6% answered incorrectly or otherwise these grants are one of the tourism trade's best kept secrets. The second conclusion is that the 25% that manifested a lack of knowledge on the subject should, in their own interest, investigate the matter. The bottom line is that there are grants available, but it appears that 94% of the people to whom this information is relevant are unaware of it.

Over 27% of respondents are willing to fund their own training.
As Figure 6.9 demonstrates, while there is a high level of contact between educational institutions and the hotels, the level of contact with the guest houses and hostels is disturbingly low. For the guesthouses, the most common assistance given was the 'Irish Home Hospitality' course in the Institute of Technology, Tralee (I.T.T.), and for the hotels, the assistance was with recruitment, placements on work schemes, or training.

78% of respondents believed that C.E.R.T. and the I.T.T. were providing enough training and were meeting local needs. A similar percentage of the hotels were taking part in the C.E.R.T. work placement scheme through which the students experience work in departments such as accommodation, bar, restaurant, and kitchen. For those hotels participating the average number of placements was six.

Some of the respondents unhappy with the present training gave reasons for their dissatisfaction. Some wanted short specific courses on subjects such as finance,
marketing and cookery. Such a course is already available during the winter months in the I.T.T., seven hours a day, one day a week and covers these areas. However, one respondent suggested that this course be geared towards keeping them abreast of modern trends. One guesthouse owner believed that training in the simple rules of housekeeping should be given at an earlier stage in the education of young people. Finally, one was of the opinion that courses in tourism were available but that "you have to pull strings to get on them - it's a disgrace!" This point is remarkable and it is worrying that such an assertion is felt strongly enough that the respondent would put it in writing.

Other work schemes hoteliers were involved in included transition year students and 50% of hotels had also been assisted by F.A.S.

Among the almost 40% of guest houses that enjoy less than 50% occupancy during the summer months, 14% of these believe that C.E.R.T. and the I.T.T. do not meet local needs. However, 26% of the remainder who have over 50% occupancy have the same reservations.

Just less than 50% of the guesthouses are open for 11 or 12 months of the year. Among these, 29% again were of the opinion that the training available did not meet local needs. For the other 50% that were open for 10 months or less, the level of dissatisfaction fell to 18%.

It appears that the busier establishments see a greater need for more training.

The same trend was evident in relation to whether or not the labour force was adequately trained. The guesthouses open for 8 months or more showed 44% dissatisfaction with the availability of trained personnel. For those open less than 8 months the level of dissatisfaction dropped to 14%. It is very likely that the
accommodations that are open for the shorter periods have less need of trained staff other than the owners themselves and so have no reason to be unhappy with the level of training within the workforce.

6.5.14 Rating of Services:

6.5.14.1 Banking:
The level of satisfaction with banking services is quite high at 85%. Over half of those that were not satisfied gave excessive charges as a reason. Other reasons included lack of competition, a need for longer opening hours, a lack of understanding, and interest rates being too high.

More than a third of the respondents suggested ways in which the banks could improve their services. The majority of these wanted to see a reduction in charges and interest rates. Other suggestions were that the banks become more adaptable, flexible and helpful, especially in the areas of opening hours, home improvement loans and interest paid on current accounts.

It was found that 10% were not still dealing with their original bank. Reasons for changing included sub-standard service, disputes regarding charges, unhelpfulness, customers feeling badly treated and in one instance the new bank provided a swipe machine for the foreign exchange free of charge.

6.5.14.2 Insurance:
The hoteliers were questioned in relation to this topic. Only one hotel experienced a high level of insurance claims and all were satisfied with their insurance companies.
6.5.14.3 Rates:
Most hotel owners were content with the rates. One source of dissatisfaction was that the rate was based on size as opposed to turnover.

6.5.14.4 Parking:
This was the category that displayed the largest level of dissatisfaction. The biggest complaint is with the lack of parking spaces, followed by a need to lower the parking rates. One respondent was unhappy that a limited number of free parking spaces were not available, remarking that this would not be the case in any of our major cities or even in London.

Figure 6.10
Rating of Parking.

6.5.14.5 Parks:
78% of the respondents saw the parks as being very good or excellent, while 7% saw them as poor or very poor. The lower ratings were due to lack of security and areas such as Collis Sandes and Ballyseedy woods being under-developed for walks.
6.5.14.6 Transport Systems:
There was a 50% level of dissatisfaction with roads due to either poor condition or the traffic system within the town.

The level of satisfaction with air and sea service was high.

Rail travel was criticised by 40% of respondents their reasons being that the system was too slow, that the service needed to be improved, that the trains needed to be upgraded or that the whole line needed upgrading.

6.5.14.7 Other Infrastructural Services:

<table>
<thead>
<tr>
<th></th>
<th>Water</th>
<th>Fire</th>
<th>Refuse</th>
<th>Sewage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>38</td>
<td>40</td>
<td>28</td>
<td>38</td>
</tr>
<tr>
<td>Very Good</td>
<td>43</td>
<td>40</td>
<td>51</td>
<td>50</td>
</tr>
<tr>
<td>Fair / Not Sure</td>
<td>13</td>
<td>20</td>
<td>14</td>
<td>6</td>
</tr>
<tr>
<td>Poor</td>
<td>4</td>
<td>0</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Very Poor</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

In the case of each of the services dealt with in Table 6.9 between 79% and 88% were satisfied with these services, and no respondent was dissatisfied with the fire service.
The complaints regarding the water supply were based on the charges being too high, a lack of prior information regarding a break in the supply and foreign bodies in the water. (Hopefully these are not tourists!)

The refuse collection service was cited as being too expensive, and not frequent enough. It was also suggested that there was a need for more bins in the town.

6.5.15 Expansion / Renovation:

6.5.15.1 Last 3 Years:
It was found that 83% of hotels and 60% guesthouses / hostels had undertaken renovations or expansions over the last three years.

40% of the hotels had refurbished their bedrooms and another 40% had also added on new bedrooms. 80% of them had carried out other refurbishments as well.

28% of guesthouses had made bedrooms en-suite, 35% had made other improvements to the house, 15% had carried out extensions and in one case a second guest house was built. 5% of guesthouses had improved their parking facilities.

6.5.15.2 Next 2 Years, 1998 and 1999:
Half of the hotels intend to expand over the next two years and high on their agenda is the provision or upgrading of conference facilities.

6.5.15.3 Aids to Expansion:
The most prominent aid to expansion in the eyes of hoteliers is the need for market growth and the marketing of Tralee. Among guesthouse owners the aid that they mentioned most frequently was grants. This was followed by tourists in the shoulder season, and more tourists' attractions. Other aids to expansion that were expressed
included more flexibility from banks, a building of community spirit, better infrastructure, a clamp-down on non-approved accommodation, low cost finance or interest-free loans, peace in the North and co-operation between state bodies and the tourism trade.

6.5.15.4 Barriers to Expansion:

Two of the six hoteliers surveyed were of the opinion that this section was not applicable to them. This is taken to mean that they saw no barriers to expansion. Two others gave no answer. The remaining two cited barriers as being a lack of ability to invest, a lack of state spending, the growth of alternative accommodation in the area, a lack of practical skills among potential employees and the volatility of the market.

Table 6.10 sums up the barriers which guesthouse / hostel keepers see to expansion.

<table>
<thead>
<tr>
<th></th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sourcing Funds</td>
<td>12</td>
<td>48</td>
</tr>
<tr>
<td>Lack of Ability to Invest</td>
<td>6</td>
<td>24</td>
</tr>
<tr>
<td>Local Resources</td>
<td>5</td>
<td>20</td>
</tr>
<tr>
<td>Lack of Skills</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td>Reduce Competition</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td>Not enough Attractions</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>16</td>
</tr>
</tbody>
</table>

Of the 25 respondents that answered this question, 72% of them stated that inability to invest and difficulty in sourcing funds was preventing them from expanding. The
bottom line here is that if they were in a financial position where they could expand, they would expand. This information, along with some of the hotels failing to see any barriers to expansion, has to portray a very buoyant atmosphere in the tourism accommodation trade at present.

Lack of resources locally and insufficient attractions were viewed by 28% of respondents as creating barriers.

One guesthouse interviewee expressed the opinion that there were no barriers to expansion.

Cross tabulations were carried out between "barriers to expansion" and variables such as "occupancy", "number of single beds", and "whether or not expansions were carried out within the last three years". It was found that the establishments that had more beds, those with higher occupancy rates and those which had expanded or renovated within the last three years were all more likely to allude to financial barriers.

For instance, 57% of the barriers mentioned by owners of premises that enjoyed greater than 50% occupancy during the months of May through to August were financial. 33% of those with less than 50% occupancy during the same months cited financial barriers.

Operators of establishments with less than three single beds indicated financial barriers in 35% of cases but those with three or more single beds recorded these same barriers in 73% of cases.

6.5.16 Crime:

One in every four of the respondents stated that crime was a problem. For one of the hotels it meant that they had to hire a number of security staff. Vandalism is the most common problem for guesthouses, followed by higher security costs, break-ins, and
petty crime. Other reasons why crime is a problem include guests being mugged, misbehaviour by youths, the spreading of litter and the fact that it deters visitors.

6.5.17 Tourism Organisations:

6.5.17.1 Bord Failte:

It was found that 13 (27%) of the 49 accommodations surveyed were not members of Bord Failte (B.F.). Of these 13, 9 belong to some other tourist organisation. 2 of them had been B.F. approved but discontinued paying the annual fee because they were dissatisfied with the return they were getting. Given that 4 of the 49 surveyed were not approved by any tourism organisation, it is safe to assume that at least 8% of accommodations are not approved. The percentage is probably much higher for a number of reasons. First, if they are operating in the black economy, then they do not want to be "appearing" anywhere and so are likely to be a bigger proportion of those that did not fill in the questionnaire. Secondly, many of the non-approved premises open only in busy times such as the Rose Festival and Listowel Race Week. These events did not occur while the survey was being administered.

When those that are members of B.F. were questioned in relation to how it could improve its service, the loudest cry was in relation to marketing and advertising. 9 (25%) wanted marketing and advertising by B.F. increased while another 2 wished to see Kerry marketed as one. The next most common complaint was the low level of bookings received from B.F.. Some saw the present guide as being too general and that there should be a detailed guide produced for each accommodation sector.

As could be anticipated, there was a call for B.F. to lower their membership costs, especially since there are commission and booking charges also. These came in for criticism for being too high as well. However, looking at this situation from B.F.'s point of view, it is not financially practical to reconcile increased marketing with lower fees.
Some found that the Gulliver system was not practical. More were of the opinion that the accommodations should be graded.

One suggested a ban on non-approved accommodation. Another believed that Bord Failte did not see the tourist as an individual. Yet another wanted to see a return to the shamrock logo, with no appreciation for the "crazy dancers". Finally, one hotel operator was "happy enough".

6.5.17.2 Other Tourist Organisations:
As the cross tabulation used in Figure 6.11 shows the membership of other tourist organisations is exactly the same as Bord Failte membership at 73%.
Table 6.11
Guest House Membership of Other Tourist Organisations.

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Town and Country Association</td>
<td>10</td>
<td>23.8</td>
</tr>
<tr>
<td>Family Homes of Ireland</td>
<td>8</td>
<td>19.0</td>
</tr>
<tr>
<td>Tralee Tourism</td>
<td>6</td>
<td>14.3</td>
</tr>
<tr>
<td>Independent Holiday Hostels</td>
<td>2</td>
<td>4.8</td>
</tr>
<tr>
<td>Irish Farm Holidays</td>
<td>2</td>
<td>4.8</td>
</tr>
<tr>
<td>Automobile Association</td>
<td>1</td>
<td>2.4</td>
</tr>
<tr>
<td>Not Applicable</td>
<td>13</td>
<td>30.9</td>
</tr>
<tr>
<td>Missing</td>
<td>1</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>43</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Most of the hotels were members of the Irish Hotels Federation and individual hotels were also members of other organisations.

The ways in which these tourist organisations could improve their services were much along the same lines as the improvements suggested for Bord Failte. The most common criticism related to advertising and marketing again and this was raised by 28% of members. There were many other suggestions but none were raised by more than one individual and so cannot be deemed to be felt strongly overall. The only suggestion here that was not mentioned by Bord Failte members was the lack of a local office.

6.6 Dining in Tralee:

There has been an improvement in the range of dining options available to the tourist in Tralee over the last decade. There is an especially good choice in the medium price range, offering high quality food at reasonable prices, and tourists appreciate this.
There is room for a high quality fish restaurant in the town. Some are located a ten minute car drive away on the road to Fenit, but there is no recognised one within the town.

The 'pub grub' in the town is widely available and competitively priced for the price conscious tourist.

The marketing initiative 'A Taste of Kerry' which promotes local beef and lamb is helpful in assuring the visitor that the meat is locally produced on the Atlantic coast and of the highest quality. These partnerships are the way forward both for the catering and the agricultural industries.

6.7 Findings of Survey of Tourists in Tralee:

6.7.1 Demographic Profile of Visitors:

6.7.1.1 Nationality:
Over 41% of the respondents reside in the 32 counties of Ireland, as shown in Table 6.12. This is significant since domestic trips decreased by 20% over the period 1993 to 1996 according to Bord Failte statistics.

Almost 20% came from Great Britain, so that 3 out of every 5 interviewed were from Ireland or the U.K. In fact, only 1 in every 9 was non-European with over 80% of these being from the United States.
### Table 6.12
Country of Residence of Visitors to Tralee

<table>
<thead>
<tr>
<th>Country</th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Munster</td>
<td>50</td>
<td>10.5</td>
</tr>
<tr>
<td>Dublin</td>
<td>52</td>
<td>11.0</td>
</tr>
<tr>
<td>Rest of Ireland</td>
<td>44</td>
<td>15.2</td>
</tr>
<tr>
<td>Ireland</td>
<td>106</td>
<td>36.5</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>14</td>
<td>4.8</td>
</tr>
<tr>
<td><strong>All Ireland</strong></td>
<td>120</td>
<td>41.3</td>
</tr>
<tr>
<td>England</td>
<td>39</td>
<td>13.4</td>
</tr>
<tr>
<td>Scotland</td>
<td>9</td>
<td>3.1</td>
</tr>
<tr>
<td>Wales</td>
<td>8</td>
<td>2.8</td>
</tr>
<tr>
<td><strong>Great Britain</strong></td>
<td>56</td>
<td>19.3</td>
</tr>
<tr>
<td>Germany</td>
<td>25</td>
<td>8.6</td>
</tr>
<tr>
<td>France</td>
<td>18</td>
<td>6.2</td>
</tr>
<tr>
<td>Benelux Countries</td>
<td>19</td>
<td>6.6</td>
</tr>
<tr>
<td>Italy</td>
<td>6</td>
<td>2.1</td>
</tr>
<tr>
<td>Other E.U.</td>
<td>10</td>
<td>3.4</td>
</tr>
<tr>
<td>Other European</td>
<td>4</td>
<td>1.4</td>
</tr>
<tr>
<td><strong>Mainland Europe</strong></td>
<td>82</td>
<td>28.3</td>
</tr>
<tr>
<td>U.S.A.</td>
<td>26</td>
<td>9.0</td>
</tr>
<tr>
<td>Canada</td>
<td>4</td>
<td>1.4</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>0.7</td>
</tr>
<tr>
<td><strong>Rest of World</strong></td>
<td>32</td>
<td>11.1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>290</td>
<td>100.0</td>
</tr>
</tbody>
</table>

It is interesting to compare this result with the results of a similar survey\(^{67}\) carried out in North Kerry in 1991. Approximately half of the interviews in that survey were

---

conducted in the Tralee area. While they are not directly comparable, some of the differences are sufficiently large that they are worth noting.

Figure 6.12
Country of Residence of Visitors to Tralee.

While the proportions of visitors from Great Britain and Mainland Europe have remained relatively static, there are very large changes among the Irish and non-Europeans. The Irish visitors have shown an almost three-fold increase while the non-Europeans are down to just over one third of their previous proportion.

6.7.1.2 Age:
The under-18 age group is not representative because when the interviewers approached family groups the older members tended to respond. Even if the strategy
had included interviewing totally at random, some interviewees would have been too young to fully understand the questions, and it still would not be fully representative. Having allowed for this, there are important statistics that can be drawn from Table 6.13, which gives the breakdown of the respondents according to age. For instance, 55.7% of all respondents are in the 25 - 44 age category.

<table>
<thead>
<tr>
<th>Age</th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 18</td>
<td>2</td>
<td>0.7</td>
</tr>
<tr>
<td>18-24</td>
<td>34</td>
<td>12.6</td>
</tr>
<tr>
<td>25-34</td>
<td>76</td>
<td>28.0</td>
</tr>
<tr>
<td>35-44</td>
<td>75</td>
<td>27.7</td>
</tr>
<tr>
<td>45-54</td>
<td>41</td>
<td>15.1</td>
</tr>
<tr>
<td>55-64</td>
<td>21</td>
<td>7.8</td>
</tr>
<tr>
<td>65+</td>
<td>22</td>
<td>8.1</td>
</tr>
<tr>
<td>Missing</td>
<td>19</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>290</td>
<td>100.0</td>
</tr>
</tbody>
</table>

6.7.1.3 Nationality by Age Group:

Figure 6.13 highlights the following findings:

- Almost three-quarters of the Irish people coming to Tralee are in the 25 - 44 age group, accounting for almost 30% of all visitors to the area. In the oldest category the Irish are below the average.
- No one interviewed in the 18 - 24 age group was from Great Britain. They had a below average presence in the categories 25 - 54 and were well above average in the 55+ category.
• The Continental Europeans tend to be younger being very prominent in the 18 - 24 age group, average in the 25 - 54 categories, and far below average in the 55+ category.

• Those from the U.S. had a low presence in the younger age groups but made up a quarter of the over 55's. Over 40% of all U.S. visitors into Tralee are in the 55+ category.

6.7.1.4 Travelling Group:

Table 6.14 gives the type of party in which the respondents travelled.

One in every two travelled as part of a family, one in four were part of other groups made up of more than two people, and one in six travelled as a couple.
<table>
<thead>
<tr>
<th>Party</th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alone</td>
<td>8</td>
<td>2.8</td>
</tr>
<tr>
<td>As a Couple</td>
<td>48</td>
<td>16.6</td>
</tr>
<tr>
<td>With a Friend</td>
<td>15</td>
<td>5.2</td>
</tr>
<tr>
<td>As a Family</td>
<td>145</td>
<td>50.0</td>
</tr>
<tr>
<td>In a Group</td>
<td>74</td>
<td>25.5</td>
</tr>
<tr>
<td></td>
<td>290</td>
<td>100.0</td>
</tr>
</tbody>
</table>

### 6.7.1.5 Nationality by Travelling Group:

Those travelling alone or with a friend have been excluded from this cross tabulation since they accounted for less than 8% of the respondents and the sub-groups would be too small for providing a source of reliable information. However, the other forms of travelling group threw up some interesting findings.

75% of all couples were from either Britain or the Continent. The statistics from Groups and from Families are in direct contrast. Ireland and the U.S. in particular are in total contrast with each other. Again, taking into account that the Irish are mainly in the 25 - 44 age group and show very high utility rates for the Aquadome, it is not surprising to find that they are 80% family groups. The visitors from the U.S. on the other hand are mainly groups of older tourists and this fits in with their high level of interest in attractions such as the Geraldine and the Museum, which would not involve physical exertion. Over 1 in 3 of the Mainland Europeans travel in groups also.
Figure 6.14
Nationality by Travelling Group (%).

6.7.1.6 Age Group by Travelling Group:

Figure 6.15
Age by Group Travel.
Over 70% of the visitors who were travelling with a friend were in the 18 - 24 age group. While 56% of respondents were in the 25 - 44 age band, 80% of these were travelling as a family. The visitors travelling in groups were well above average in the 18 - 24 category and also in the 55+ category.

6.7.1.7 Travelling Group by Number in Party:

Figure 6.16
Numbers in Family Groups.

As Figure 6.16 displays, the average number in family groups is between 4 and 5.

Figure 6.17 highlights that the average numbers in the groups which respondents were part of were between 23 and 24. The standard deviation in this case is quite high at 15.7 with a relatively even spread in groups made up of between 3 and 40.
6.7.1.8 Gender:
168 (58.7%) were male, 118 (41.3%) were female and four did not respond.

6.7.1.9 Marital Status:
211 (74.6%) are married, 68 (24.0%) are single, 4 (1.4%) widowed and another 7 did not respond to this question. No interviewees classified themselves as other than married, single or widowed.

6.7.1.10 Nationality by Marital Status:
Table 6.15 is a summary of the overall cross tabulation to highlight some of the main findings in it. While 3/4 of all visitors to the area were married, 7 in every 8 of the Irish and British were married, but less than one in every two of the continentals. So the continentals provide almost two thirds of the single people holidaying in the Tralee area - three times the number of Irish singles. In fact there were more single German holiday makers than Irish, and almost as many French!
Table 6.15
Nationality by Marital Status.*

<table>
<thead>
<tr>
<th></th>
<th>Married</th>
<th>Single</th>
<th>Widowed</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Ireland</td>
<td>101</td>
<td>15</td>
<td>2</td>
<td>118</td>
</tr>
<tr>
<td>Great Britain</td>
<td>51</td>
<td>4</td>
<td>0</td>
<td>55</td>
</tr>
<tr>
<td>Mainland Europe</td>
<td>36</td>
<td>42</td>
<td>1</td>
<td>79</td>
</tr>
<tr>
<td>U.S.A.</td>
<td>20</td>
<td>4</td>
<td>1</td>
<td>25</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>3</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>All Visitors</td>
<td>211</td>
<td>68</td>
<td>4</td>
<td>283</td>
</tr>
</tbody>
</table>

6.7.1.11 Occupation of Respondents:

Table 6.16
Occupation

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>A upper professional and business</td>
<td>17</td>
<td>5.9</td>
</tr>
<tr>
<td>B professional and managerial</td>
<td>45</td>
<td>15.7</td>
</tr>
<tr>
<td>C1 white collar</td>
<td>74</td>
<td>25.9</td>
</tr>
<tr>
<td>C2 skilled manual</td>
<td>41</td>
<td>14.3</td>
</tr>
<tr>
<td>D unskilled manual</td>
<td>32</td>
<td>11.2</td>
</tr>
<tr>
<td>E marginal</td>
<td>3</td>
<td>1.1</td>
</tr>
<tr>
<td>F farmer</td>
<td>7</td>
<td>2.5</td>
</tr>
<tr>
<td>student</td>
<td>27</td>
<td>9.4</td>
</tr>
<tr>
<td>retired</td>
<td>40</td>
<td>14.0</td>
</tr>
<tr>
<td>Missing</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>290</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Over one in four of all tourists to Tralee are in the C1 category. Other classes that are strongly represented are B, C2, and D. Just as important as these is the retired group.
Given that they showed so strongly when the survey was undertaken during the summer months, these "golden years" customers are obvious targets for extra business in the shoulder season since they are available for holidays at all times. As could be expected, the marginalised are rarely in a position to afford a holiday.

6.7.2 Place:

6.7.2.1 Accommodation:

The interviewees were asked what form of accommodation they used in the Tralee area, thus excluding the 87 who were day-trippers.

<table>
<thead>
<tr>
<th>Type</th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>30</td>
<td>15.2</td>
</tr>
<tr>
<td>Guest house</td>
<td>69</td>
<td>34.8</td>
</tr>
<tr>
<td>Farmhouse</td>
<td>2</td>
<td>1.0</td>
</tr>
<tr>
<td>Town &amp; Country Home</td>
<td>13</td>
<td>6.6</td>
</tr>
<tr>
<td>Friends / Relatives</td>
<td>12</td>
<td>6.1</td>
</tr>
<tr>
<td>Camping / Caravaning</td>
<td>22</td>
<td>11.1</td>
</tr>
<tr>
<td>Hostel</td>
<td>7</td>
<td>3.5</td>
</tr>
<tr>
<td>Self-catering</td>
<td>43</td>
<td>21.7</td>
</tr>
<tr>
<td>Not Applicable</td>
<td>87</td>
<td>-</td>
</tr>
<tr>
<td>Missing</td>
<td>5</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>290</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>
The most popular form of accommodation was guest house, which was the preference of more than 1 in every 3. This was followed by self-catering and then hotels. These three account for almost 3/4 of all accommodation used in Tralee.

Although the respondents were not asked in the questionnaire what type of accommodation they used if they were not staying in the Tralee area, forty eight of the eighty nine supplied this information. This sample is too small to draw any conclusions from the sub-groups but a few points are worth noting. Seven stayed in hostels, and ten in hotels. This tends to suggest that there could be an under-supply of these forms of accommodation in the Tralee area. Another five stayed in farmhouse accommodation, but given that Tralee is basically an urban area, this is to be expected. Five of the forty eight stayed in self-catering outside the area. The suggestion here is that there is sufficient self-catering in Tralee.

6.7.2.2 Nationality by Accommodation:

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>All Ireland</th>
<th>Great Britain</th>
<th>Mainland Europe</th>
<th>U.S.A. &amp; Other</th>
<th>Average (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>7.8</td>
<td>17.0</td>
<td>19.7</td>
<td>40.0</td>
<td>15.2</td>
</tr>
<tr>
<td>Guest house</td>
<td>30.0</td>
<td>36.1</td>
<td>38.1</td>
<td>32.0</td>
<td>34.8</td>
</tr>
<tr>
<td>Farmhouse</td>
<td>1.0</td>
<td>4.3</td>
<td>5.6</td>
<td>0.0</td>
<td>1.0</td>
</tr>
<tr>
<td>Town &amp; Country Home</td>
<td>2.9</td>
<td>10.6</td>
<td>5.6</td>
<td>4.0</td>
<td>6.6</td>
</tr>
<tr>
<td>Friends &amp; Relatives</td>
<td>10.7</td>
<td>4.3</td>
<td>0.0</td>
<td>16.0</td>
<td>6.1</td>
</tr>
<tr>
<td>Camping &amp; Caravaning</td>
<td>11.7</td>
<td>6.4</td>
<td>14.1</td>
<td>0.0</td>
<td>11.1</td>
</tr>
<tr>
<td>Hostel</td>
<td>2.9</td>
<td>0.0</td>
<td>12.7</td>
<td>8.0</td>
<td>3.5</td>
</tr>
<tr>
<td>Self-Catering</td>
<td>33.0</td>
<td>21.3</td>
<td>4.2</td>
<td>0.0</td>
<td>21.7</td>
</tr>
<tr>
<td>Totals</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
</tbody>
</table>
It is interesting to see what forms of accommodation are popular with the different nationalities. However, when doing this cross tabulation it is important to keep in mind the information already gleaned, such as the breakdown in age groups and travelling arrangements.

For each of the divisions of nationalities, the usage of Guest houses is between 30% and 40%. Hotels, on the other hand, show low utilisation by the Irish at about 1 in every 13, but high utilisation by the U.S. visitors averaging 2 in every 5. The Town and Country homes are most popular among the British. Almost 90% of those using Camping and Caravaning as their accommodation were either Irish or Continental. Hostels exhibit largest usage among the Continentals also but this is to be expected since these are also the most likely to be young and single. Self-Catering then is most popular among the Irish, being used by 1 in 3 of all Irish visitors to the area. It is also popular with the British, but little used by any other nationality. The visitors from Northern Ireland stayed almost entirely in Guest houses or Self-Catering.

6.7.2.3 Accommodation by Age Group:

In this cross tabulation only those visitors whose accommodation was in the Tralee area are included. Figure 6.18 displays the usage among different age bands, of the four most common forms of accommodation.

The most important age category to examine is the 25 - 44 band since these make up more than half of all visitors interviewed. 60% of this category used either Guest houses or stayed in Self-Catering accommodation, with the Guest houses enjoying the greater share. Another 20% shared Hotels or Camping and Caravaning equally. Friends and Relatives, and Town and Country Homes made up another 15%. The remaining 5% then were shared by the other forms of overnight stay.
Guest houses also dominated the 45 - 64 category but Hotels were the next in popularity. As the age bands moved to older groups, the numbers staying in Hotels increased in proportion to the overall number.

Camping and Caravaning is, as expected, much more popular among the younger visitors.

Over two-thirds of those staying in hostels were in the 18 - 24 category, while over 80% of those who stayed with Friends and Relatives were 25 - 44. Town and Country Homes was the choice of middle-aged visitors only.

6.7.2.4 Accommodation by Travelling Group:
Guest houses were by far the most popular form of accommodation among couples, making up two-thirds of their overall accommodation.
Table 6.19
Accommodation by Travelling Group (%).

<table>
<thead>
<tr>
<th></th>
<th>As Couple</th>
<th>As Family</th>
<th>In Group</th>
<th>Overall Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>9.7</td>
<td>7.7</td>
<td>46.1</td>
<td>16.0</td>
</tr>
<tr>
<td>Guest house</td>
<td>64.5</td>
<td>32.5</td>
<td>25.6</td>
<td>36.4</td>
</tr>
<tr>
<td>Farmhouse</td>
<td>3.2</td>
<td>0.0</td>
<td>2.6</td>
<td>1.1</td>
</tr>
<tr>
<td>Town &amp; Country Home</td>
<td>9.7</td>
<td>6.8</td>
<td>2.6</td>
<td>6.4</td>
</tr>
<tr>
<td>Friends &amp; Relatives</td>
<td>3.2</td>
<td>8.5</td>
<td>2.6</td>
<td>6.4</td>
</tr>
<tr>
<td>Camping &amp; Caravaning</td>
<td>0.0</td>
<td>13.7</td>
<td>5.1</td>
<td>9.6</td>
</tr>
<tr>
<td>Hostel</td>
<td>0.0</td>
<td>0.0</td>
<td>7.7</td>
<td>1.6</td>
</tr>
<tr>
<td>Self-Catering</td>
<td>9.7</td>
<td>30.8</td>
<td>7.7</td>
<td>22.5</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100.0</strong></td>
<td><strong>100.0</strong></td>
<td><strong>100.0</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>

Nearly two-thirds of family accommodation was divided relatively evenly between guest houses and self-catering.

Almost half of the groups stayed in hotels with another quarter staying in guest houses.

6.7.2.5 Accommodation by Social Class:

One in every six from the ABC categories used hotel accommodation while one in every four of retired visitors did so. Guest houses had above average usage by the DEF categories, and below average among students. Self-catering was little used by the retired and not used by students, but otherwise it was utilised by one in four from all social classes.
Table 6.20
Accommodation by Social Class (%).

<table>
<thead>
<tr>
<th></th>
<th>A &amp; B*</th>
<th>C1 &amp; C2*</th>
<th>D, E &amp; F*</th>
<th>Retired</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>16.7</td>
<td>16.5</td>
<td>3.6</td>
<td>26.2</td>
<td>0.0</td>
</tr>
<tr>
<td>Guest house</td>
<td>33.3</td>
<td>31.7</td>
<td>50.0</td>
<td>39.2</td>
<td>25.0</td>
</tr>
<tr>
<td>Farmhouse</td>
<td>2.1</td>
<td>1.2</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Town &amp; Country Home</td>
<td>10.4</td>
<td>5.9</td>
<td>7.1</td>
<td>4.3</td>
<td>0.0</td>
</tr>
<tr>
<td>Friends &amp; Relatives</td>
<td>6.3</td>
<td>5.9</td>
<td>10.7</td>
<td>4.3</td>
<td>0.0</td>
</tr>
<tr>
<td>Camping &amp; Caravaning</td>
<td>6.3</td>
<td>11.8</td>
<td>3.6</td>
<td>13.0</td>
<td>41.7</td>
</tr>
<tr>
<td>Hostel</td>
<td>0.0</td>
<td>2.4</td>
<td>0.0</td>
<td>0.0</td>
<td>33.3</td>
</tr>
<tr>
<td>Self-Catering</td>
<td>25.0</td>
<td>24.6</td>
<td>25.0</td>
<td>13.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Total</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
</tbody>
</table>

*The socio-economic classes are explained in Table 6.16.

6.7.2.6 Accommodation by Marital Status:

Figure 6.19
Accommodation by Marital Status.
One aspect of the marital status of the respondents that were accommodated in the Tralee area only, is that a much higher proportion of them are married (82% as opposed to 75% of overall respondents).

The two very obvious variations from the average are hostels, which are the favoured haunts of the young, and the self-catering, used by the married visitors in over 95% of cases.

6.7.2.7 **Main Reason for Visiting Tralee:**

Table 6.21 deals with the main reasons that respondents gave for visiting Tralee.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day Trip</td>
<td>71</td>
<td>25.0</td>
</tr>
<tr>
<td>Holiday</td>
<td>205</td>
<td>72.2</td>
</tr>
<tr>
<td>Visiting Friends / Relatives</td>
<td>8</td>
<td>2.8</td>
</tr>
<tr>
<td>Missing</td>
<td>6</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>290</td>
<td>100.0</td>
</tr>
</tbody>
</table>

While the percentage for 'visiting relatives' is quite low at 2.8%, it must be remembered that even though they may have come to Ireland or Kerry primarily to visit relatives, these relatives would not necessarily be in Tralee and so the main reason for being in the Tralee area would be for pleasure. If this same question had been put to the overseas visitor at a port of entry the answer may well be different.
Thirty six of the seventy one day-trippers stated where their accommodation was located. Twenty one were Killarney based (nearly 60%), four were from Dingle (11%), three from Killorglin (8%), and the others were from places such as Ballybunion, Limerick, and Kenmare.

6.7.3 Special Interests:

6.7.3.1 Activities:

<table>
<thead>
<tr>
<th>Type</th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cycling</td>
<td>39</td>
<td>13.8</td>
</tr>
<tr>
<td>Fishing</td>
<td>31</td>
<td>11.0</td>
</tr>
<tr>
<td>Walking</td>
<td>212</td>
<td>74.9</td>
</tr>
<tr>
<td>Golfing</td>
<td>40</td>
<td>14.1</td>
</tr>
<tr>
<td>Bowling</td>
<td>22</td>
<td>7.8</td>
</tr>
<tr>
<td>Shopping</td>
<td>196</td>
<td>69.3</td>
</tr>
<tr>
<td>Sight-seeing / Touring</td>
<td>262</td>
<td>92.6</td>
</tr>
<tr>
<td>Water-based Activities</td>
<td>83</td>
<td>29.3</td>
</tr>
<tr>
<td>Beach</td>
<td>9</td>
<td>3.2</td>
</tr>
<tr>
<td>Missing</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td></td>
<td>901</td>
<td>316.0</td>
</tr>
</tbody>
</table>

* The totals in Table 6.22 do not add up to 290 and 100% respectively since each respondent could participate in more than one activity.
Sight-seeing was the most popular activity with 93% of respondents participating. This is followed by walking (75%) and shopping (70%). Water-based activities were participated in by 30%.

6.7.3.2 Nationality by Activities:

Table 6.23 looks at the activities which showed a significant difference, depending on the country of origin of the respondent.

<table>
<thead>
<tr>
<th>Nationality by Activities (%)</th>
<th>Water-based Activities</th>
<th>Shopping / Touring</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Ireland</td>
<td>44.9</td>
<td>65.3</td>
</tr>
<tr>
<td>Great Britain</td>
<td>25.9</td>
<td>72.7</td>
</tr>
<tr>
<td>Mainland Europe</td>
<td>13.8</td>
<td>63.1</td>
</tr>
<tr>
<td>U.S.A.</td>
<td>12.0</td>
<td>80.0</td>
</tr>
<tr>
<td>Other</td>
<td>16.7</td>
<td>100.0</td>
</tr>
</tbody>
</table>

It is evident that Water-based Activities are two and a half times as popular among the Irish visitors as among the non-Irish (45% versus 18% respectively). One of the possible reasons for this is that many of the non-Irish have equally as good if not better facilities available to them in their own countries at less expensive rates. However, there are few such facilities in Ireland and so for the Irish it is quite a novelty.

In general, the further away the home of the respondent, the more likely they are to both shop and sight-see. The only exception to this statement are the Continental
Europeans in relation to shopping but it has already been seen that they are much younger than average and it is logical that as a result they would have less disposable income.

For other activities the sub-groups became quite small and so the conclusions would be less reliable. Cycling and Fishing showed results that were very similar with 1 in 4 of Continentals participating in each, 1 in 6 of the British, 1 in 10 of the Irish and none of the Americans or Others. The Bowling, like the Water-based Activities, was most popular among the Irish (1 in 8) and not as popular among the rest (1 in 20).

6.7.3.3 Age Group by Activities:
Walking, shopping and sight-seeing made up 74.8% of all activities engaged in but in the 45+ age category they made up 81.4% of all activities.

The 18 - 34 bracket accounted for approximately 40% of all visitors surveyed, but 70% of cyclists.

Likewise, the 25 - 44 band included 56% of all visitors, but 70% of those engaged in water-based activities.

6.7.3.4 Marital Status by Activities:
Cycling, as expected, was more popular with those who were single with 25% of them using it, be it for exercise or transport. Of the married people, 10% cycled.

7 out of every 8 golfers were married. It is probable that both the golf and cycling statistics are financial reflections that happen to coincide with marital status.

In relation to water-based activities, 5 out of every 6 who participated were married.
6.7.3.5 Travelling Group by Activities:
The outstanding features of this cross tabulation were:

Bowling: Over 80% of the visitors who went bowling were travelling as a family.
Water-based Activities: Over 75% of these participants were travelling as a family.

These two percentages are to be balanced with the fact that 50% of all respondents travelled in a family group.

It was found that while over 70% of family groups that visit the area go to the Aquadome, it becomes a mere 11% in the case of those travelling in groups. The Aquadome is a very suitable attraction for families, but there may be scope for aiming advertising at the groups that visit the town so that it becomes part of their itinerary.

6.7.3.6 Entertainment:
Table 6.24, while displaying the popularity of certain types of entertainments in 1997, also includes the figures from the 1991 survey of North Kerry\(^{68}\) tourists for comparison purposes.

The popularity of the singing pub, Siamsa Tire, and cabaret are very similar for 1991 and 1997 with an average difference for the three of them of less than one per cent. There is an increase in the proportion availing of traditional Irish music of over ten per cent.

### Table 6.24
Entertainment Availed of by Tourists.

<table>
<thead>
<tr>
<th>Type</th>
<th>No. 1997</th>
<th>% 1997</th>
<th>% 1991</th>
</tr>
</thead>
<tbody>
<tr>
<td>Singing Pubs</td>
<td>150</td>
<td>67.9</td>
<td>68.8</td>
</tr>
<tr>
<td>Traditional Irish Music</td>
<td>133</td>
<td>60.2</td>
<td>49.3</td>
</tr>
<tr>
<td>Siamsa Tire</td>
<td>46</td>
<td>20.8</td>
<td>19.3</td>
</tr>
<tr>
<td>Cabarets</td>
<td>10</td>
<td>4.5</td>
<td>4.8</td>
</tr>
<tr>
<td>Other</td>
<td>16</td>
<td>7.2</td>
<td>15.8</td>
</tr>
<tr>
<td>None</td>
<td>13</td>
<td>5.9</td>
<td>-</td>
</tr>
<tr>
<td>Missing</td>
<td>69</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>435</strong></td>
<td><strong>165.6</strong></td>
<td><strong>158.0</strong></td>
</tr>
</tbody>
</table>

### Table 6.25
Nationality by Entertainment Availed Of.

<table>
<thead>
<tr>
<th>Nationality</th>
<th>Singing Pubs</th>
<th>Siamsa Tire</th>
<th>Trad. Irish Music</th>
</tr>
</thead>
<tbody>
<tr>
<td>Munster</td>
<td>89.5</td>
<td>26.3</td>
<td>47.4</td>
</tr>
<tr>
<td>Dublin</td>
<td>86.4</td>
<td>4.5</td>
<td>50.0</td>
</tr>
<tr>
<td>Rest of Ireland</td>
<td>67.6</td>
<td>38.2</td>
<td>64.7</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>81.8</td>
<td>9.1</td>
<td>81.8</td>
</tr>
<tr>
<td>All Ireland</td>
<td>79.1</td>
<td>23.3</td>
<td>59.3</td>
</tr>
<tr>
<td>Great Britain</td>
<td>62.5</td>
<td>14.6</td>
<td>64.6</td>
</tr>
<tr>
<td>Mainland Europe</td>
<td>55.4</td>
<td>23.1</td>
<td>52.3</td>
</tr>
<tr>
<td>U.S.A.</td>
<td>70.0</td>
<td>20.0</td>
<td>80.0</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td><strong>67.6</strong></td>
<td><strong>20.7</strong></td>
<td><strong>59.9</strong></td>
</tr>
</tbody>
</table>
While 4 in every 5 of the Irish avail of Singing Pubs as a form of entertainment during their stay in Tralee, the statistic is 3 in 5 for the non-Irish.

It is interesting to look at the utilisation of Siamsa Tire in the Irish context. An average of only 6% of those from Dublin and the North go there, with 36% of visitors from other parts of Ireland enjoying what it has to offer.

In contrast to this last finding the visitors from the North are very interested in Irish music, as are those from the U.S. The least interest is evident among those from Munster and Dublin. Of course, it is likely that these have ready access to traditional Irish music when they reside at home since this would be still within Ireland.

6.7.3.8 Attractions:

Over the last six years a large number of attractions have come on stream in the Tralee area. As a result there is a respectable choice on offer now to the visitors. Table 6.26 lists them and shows their popularity.

The Geraldine Experience was the most popular with 5 in every 7 tourists visiting it. This is followed by the Kerry County Museum, visited by 1 in every 2. Then come the Aquadome (4 in 9) and the Windmill with its visitor centre (4 in 10). The Steam Train and Siamsa Tire enjoy an attendance of approximately 1 in 5. Overall, these 6 attractions have an average attendance of 41.3 among all tourists.
### Table 6.26
Attractions Visited by Tourists.

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aquadome</td>
<td>114</td>
<td>44.7</td>
</tr>
<tr>
<td>Steam Train</td>
<td>55</td>
<td>21.6</td>
</tr>
<tr>
<td>Windmill &amp; Visitor Centre</td>
<td>102</td>
<td>40.0</td>
</tr>
<tr>
<td>Siamsa Tire</td>
<td>48</td>
<td>18.8</td>
</tr>
<tr>
<td>Geraldine Experience</td>
<td>183</td>
<td>71.8</td>
</tr>
<tr>
<td>Kerry County Museum</td>
<td>129</td>
<td>50.6</td>
</tr>
<tr>
<td>Fenit Sea World</td>
<td>10</td>
<td>3.9</td>
</tr>
<tr>
<td>Town Park</td>
<td>5</td>
<td>2.0</td>
</tr>
<tr>
<td>None</td>
<td>9</td>
<td>3.5</td>
</tr>
<tr>
<td>Missing</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>690</td>
<td><strong>256.9</strong></td>
</tr>
</tbody>
</table>

### 6.7.3.9 Nationality by Attractions:

### Table 6.27
Nationality by Attractions (%).

<table>
<thead>
<tr>
<th></th>
<th>Aquadome</th>
<th>Geraldine</th>
<th>Kerry Co. Museum</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Ireland</td>
<td>80.2</td>
<td>67.6</td>
<td>51.4</td>
</tr>
<tr>
<td>Great Britain</td>
<td>27.9</td>
<td>74.4</td>
<td>48.8</td>
</tr>
<tr>
<td>Mainland Europe</td>
<td>16.2</td>
<td>71.6</td>
<td>44.6</td>
</tr>
<tr>
<td>U.S.A.</td>
<td>4.2</td>
<td>83.3</td>
<td>66.7</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td><strong>44.7</strong></td>
<td><strong>71.8</strong></td>
<td><strong>50.6</strong></td>
</tr>
</tbody>
</table>
Table 6.27 bears out the findings in the cross tabulation which looked at water-based activities. Over 4 in every 5 Irish visit the Aquadome while the usage rate among the non-Irish is less than 1 in 5.

The Geraldine Experience is most popular among the U.S. visitors with little difference in the rates at which all other nationalities attend it. The Kerry County Museum does not enjoy the same popularity overall as the Geraldine, but again is most popular with the Americans. It is least popular with the Continentals and is about average for the Irish and British visitors.

Another point of note is that all of the respondents that mentioned the Fenit Sea World were Irish.

6.7.3.10 Age Group by Attractions:
There were no significant differences in the utilisation of attractions such as Siamsa Tire, the Geraldine or the Kerry County Museum among the different age groupings. However, while the 25 - 44 group made up 56% of all respondents, this category accounted for 74% of users of the Aquadome, 86% of users of the Steam Train, and 69% of visitors to the Blennerville Windmill Centre. The 25 - 44 group accounted for 62% of visits or intended visits to attractions. There was almost no interest among the 55+ category for either the Aquadome or the Steam Train. Neither had the 18 - 24 group any interest in the Steam Train.

6.7.3.11 Marital Status by Attractions:
While 75% of all respondents were married, they made up 80% of visitors to attractions. In fact, for the Aquadome and Steam Train they averaged 88% of visitors. All of the visitors that mentioned the Fenit Sea World were married.
6.7.4 Corollary:

This section of the tourists' survey gives an insight into the attributes of the tourists that visit the area. It also makes it quite clear that there is no such thing as a typical tourist. They were not asked questions of a financial nature since the answers would not be reliable. Other than the domestic and British visitors whose pound Sterling is easily comparable with the Irish pound, there would be difficulty in answering financial questions in what is a foreign currency denomination to overseas tourists. This difficulty will be overcome for many of the tourists to the town with the introduction of the Euro coins and notes in 2002.

Tourists' opinions and how they came to know of Tralee are dealt with in Chapter 6. Teasing out not just what they want now but what they will want in the future is the cornerstone of a sustainable tourism industry in Tralee.
Chapter 7

Tourism Development Progression for Tralee

7.1 Introduction:

Many tourist destinations have gone through a recognisable cycle in their development and anyone with a vested interest in tourism in Tralee would be well advised to familiarise themselves with Butler's cyclical view of tourism development. It is broadly based on the product life-cycle concept, where the product initially experiences a period of slow growth and if it is marketed in the right way this will be followed by a period of rapid growth. Subsequently there is a period of stability and if there are no product improvements made, then there is decline with falling sales and the product is removed from the market. Butler also included a ceiling on the number of tourists that a destination could carry which involved the concept that the destination would reach stability in terms of numbers before reaching its carrying capacity, and thereby could be regarded as sustainable in the long term.

The important point in all of this for Tralee as a tourist destination is that there is a need to realise that there is a carrying capacity that is not easily defined. According to O'Reilly it may be in a number of forms:

- *Physical*, with wear and tear appearing along with other environmental problems.

  In Tralee there had been a great impetus given to product development, which is now being followed by accommodation growth. However, there is a black cloud on the horizon, which is the realisation that globally there are environmental problems due to scale which require international, national or local regulation.

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Even in the next decade the imposition of quotas is expected on the scale of tourism activity at local level.

- **Psychological**, which relates to tourists' perceptions of environmental quality and the risk that tourist numbers will decline due to perceived capacities being exceeded and failure to attract. The emphasis on environmental protection is influencing attitude change in tourists and leading to growing expectations.

- **Social**, involving the degree of tolerance of the local community or the level of crowding that the visitors are willing to accept. This is difficult to define since tolerance varies with the time of year, with the specific location and with the degree of interaction between residents and tourists.

- **Economic**, which looks at what other desirable activities are displaced or disrupted. For instance, what were the alternative uses of the Shannon Development grants of IR£5mn. spent on tourism-related projects and would the alternatives have yielded better employment potential? Obviously Shannon Development believed that tourism was the best alternative but in terms of carrying capacity this opportunity cost forms part of the overall equation.

All of the above are inter-related, and while it would be difficult enough to agree on the capacities in each category with full information, it is extremely so when this information is lacking. The real lesson that has to be taken on board, however, is that other destinations have, in the past, ignored the carrying capacity to their detriment and have had decades in which to wallow in their regret. The carrying capacity and the long term viability of tourism in Tralee have the potential to enjoy a synergistic relationship, and if they do not, then the outlook is bleak with its traditional effects of over-development of tourism.
7.2 Findings of Focus Group Interview:

The focus group highlighted a number of matters that are of specific interest to the Tralee area. These have been intermingled with other points that are of relevance to the development of tourism in the town to inform this section of the study.

7.3 Tralee - in general:

It is obvious that with the decline in manufacturing and agriculture in the area a greater emphasis has been placed on tourism to provide employment and economic growth in the future. A foreign manufacturing industry has not been attracted to the town since 1986 and there is no change occurring to create a more optimistic outlook.

"Tralee has made the conscious decision that tourism is going to be a force for the future."

Enterprise Development Manager

There was a buoyant feeling among the participants that tourism in the town had developed greatly over the last decade. The public facilities and attractions had been put in place and so the stage was set for the input of the private sector.

"What you have in Tralee now that you didn't have in the late '80s is a confidence in the private sector to invest money."

Attractions Manager.

There has been a five-fold increase in the numbers visiting public attractions in the town from 100,000 in 1990 to 500,000 in 1997, and the expectation is that this will reach one million within two to three years if the impetus is maintained. This did not take cognisance of the fact that there are a large number of attractions in place now
that were not in existence in 1990, the numbers visiting them have dropped to a minimal rate of increase and there are few new attractions being developed.

7.4 Recent Developments:

The tourism interests in Tralee broadly believe that they have been successful in preventing any destruction of the town's character through new developments. However, there is the fear that the development of tourist accommodation in the country far outstripped the development of tourist numbers, and as a result there will be even more competition on price.

The Brandon Hotel is in the process of spending £3.6 million on its current phase of development. It is expanding to include a conference centre because of a lack of confidence in tourism statistics regarding growth and the fact that the season is still limited to about twelve weeks. Along the western sea-board there is the reality of falling market share and for the hotel sector this means an increase in competition, both in terms of volume of business and price. It is hoped that the conference centre will boost the town in the off-season, bringing in bigger spenders.

The development of tourism in Tralee has been very much top driven, based very much on man-built attractions in the area, such as the Aquadome, the Geraldine Experience, the Space Museum, Siamsa Tire, the Steam Train, and now the Jeanie Johnston Ship.

The local authorities have improved aspects of the infrastructure such as water supply and sewage treatment. Tralee is very well served with water - there is sufficient water to supply a population of 50,000. A major sewerage treatment plant is at present being completed which will have the great effect of cleaning up the water of Tralee Bay.
Late night shopping is becoming more of an issue. The owners of accommodation would benefit from longer opening hours because the tourist who is in Tralee after six o'clock on summer evenings finds everything closed with the exception of pubs and restaurants.

"You have beautiful wide streets - it's a wonderful town, but there's nothing to do."

Accommodation Provider.

One of the main factors in highlighting this was the proximity of Tralee to Killarney where the shops have been open late for years. However, it is probable that some shops will be open late in Tralee during the summer of 1998.

The need has been recognised for people in the private sector to communicate with each other regarding what they are planning to do - that there is more to be gained from the synergies involved than could be lost by someone else being aware of your intentions. To date much of the development has progressed without any clear-cut ideas of what any individual wanted the overall outcome or 'package' to be.

In recent years there has been a change in attitude among transport providers in that they are now encouraging people to treat Tralee as a destination in its own right and to use it as a base from which to tour the South-west. The main strengths of the area are seen to be its location within the country and the range of its all-weather and other facilities.

A positive development in the town is the provision of a new caravan and camping park. In this case the owner travelled to France to see the quality of the product provided there and then set higher standards for himself.

"It is being designed on the future rather than on the present requirements."

Accommodation Provider.
It is this type of approach to development that can set Tralee apart, by providing a quality product which is not the cheapest but which is excellent value for money.

7.5 Sustainable Development:

This has been highlighted as a key issue for the future by the Irish Tourism Industry Confederation (ITIC) which in association with Bord Failte has recently been working on a strategic plan for the industry. There is intensifying competition from new destinations and a need to take a medium-term and long-term view, addressing the national and international factors that will shape tourism into the future.  

The focus group was not clear on what was meant by sustainable tourism, but some did understand the importance of maximising revenue as opposed to chasing volume of tourists, improving quality, improving the physical product and preserving culture. The one obvious exception that was not recognised as being significant was the social context in which tourism occurred. While the target for some was to double the volume over the next three years, others saw the inherent danger in this approach.

"I don't think Ireland can continue to chase volume. Sustainable tourism is about not destroying the very thing that they (tourists) are coming to see".

Hotelier.

Having said that, the participants felt that the area had the ability to absorb more visitors and would welcome an increase in numbers. Tourism businesses accept that some areas have reached their carrying capacities and that any further increase in visitors can only result in further damage to the tourism product and the industry. However, this always seems to refer to an area other than their own. When the tourists are outside their own doors there is comfort and security in numbers.

7.5.1 Roles:

Both the public sector and the private sector each have different roles to play in the achievement of sustainability and the long term well-being of Tralee as a tourist destination. These are very distinctive and easily recognised.

7.5.2 Public Sector Role:

The public sector has had many effective tools at its disposal and through its inertia is, in some instances, guilty of serious negligence. Some of these tools are now examined more closely:

7.5.2.1 Land-use planning:

This is one of the basic and most effective tools available to planners. The defensive approach in this area deals with protecting natural resources, e.g., the national park. Permission is required before a developer can build a hotel or a house, or even an extension. For larger developments there is a growing requirement that an Environmental Impact Assessment (EIA) be carried out before there is any possibility of obtaining planning permission. It is a control over the capacity, form, and characteristics of a development. The planning authority can also be proactive, encouraging selected forms of development in specified places. The new caravan and camping park is an obvious example where a consultants' report suggested a specific use for a specific location and now it has come to fruition.

7.5.2.2 Building Regulations:

These also can be protective dealing with matters like size, height, density of structures, access and car parking. They are proactive in terms of landscaping, colour, materials, architectural style, and historic conservation zones.

Neither land nor building regulations were designed with tourism in mind. They are in the hands of planners and public representatives. The key element is not that they need to develop new tools, but rather that they need to have sufficient knowledge to use the existing tools to their maximum effect.

The focus group highlighted that strategic planning needs very close management. There is scope for leading by example through co-operation and partnership between the local community, private enterprise and the Local Authorities, so that in effect the people of Tralee have an opportunity to decide what type of town they want it to become. In the present situation the face of Tralee is being changed by the next developer that happens to submit plans. This means that the chances of ending up with the optimum form of progression are negligible.

"At the moment the developer is king"

Hotelier.

The perception of planning is that the people of Tralee deserve better and that to a large extent the necessary powers already rest with the Urban District Council. The County Council are very conscious of the fact that they are in a high visibility tourism area. They are certainly conscious of the fact that it is a serious business in the county and they are prepared to address it in any way they can. It will be interesting to see what type of control can actually be exercised in the way the town develops.

One idea put forward suggested that a way be found to have expertise on tourism issues available to the Council on an ongoing basis due to the heightened importance of the industry and especially because of the many contradictions that have to be negotiated successfully to achieve sustainability. Planners cannot be expected to have a strong background in tourism.
"There is a need for a tourism office in Kerry County Council and a tourism executive who is a specialist in the tourism area, working closely with the County Manager."

Regional Body Representative.

One role for this 'adviser' would be to facilitate the identification of suitable developments and to encourage appropriate parties to exploit them, especially if/when funding is available for these developments which may not be available at a later stage and without which the developer would not proceed. This would serve to prevent instances where positive developments have not occurred through lack of information. It would have to be seen to be happening in an open manner where the information is available to all that may be interested, and in particular the local community.

7.5.2.3 Provision of infrastructure:

Through this, the public sector controls some very important aspects of tourism management. First, the capacity that the infrastructure allows determines the capacity of tourism. Secondly, the public sector has a large influence over the quality of the infrastructure.

The physical fabric of the town was highlighted as an area that requires considerable attention. The town is viewed as having the potential to be very attractive and interesting, especially with its very large, boulevard-type streets and period architecture. However, the overall impression is not enticing.

"We have many interesting buildings such as the courthouse and the churches but the overall appearance of the town is dowdy, and dirty."

Hotelier.

It is accepted that it is no longer good enough for the business people of the town to have their own house in order. The tourist carries away a total experience such that
the entrance to the town is as important as any of the businesses that the tourist visits - possibly even more important due to the effect of first impressions.

"What happens outside my door-step is no longer good enough - it has to happen on a broader scale."

Shop Owner.

There was dissatisfaction expressed by many at the state of the entrance to the town from the Dingle road, more so because it has been that way for many years. When there is scant regard for the physical environment there cannot be any great expectations regarding the non-tangible aspects of it. The whole atmosphere in the town needs to be changed if tourists are to be enticed into staying for longer.

"There is an awful lot more to a tourism town than the development of the physical product. We have got to look at tourism culture, what enhances a visit and what makes a tourist choose a base for a holiday"

Hotelier.

In the accommodation survey 24% of the respondents wished to see an improvement in the infrastructure in the area. These improvements included better parking facilities, more cycling and walking paths, better lighting, better bus facilities, less traffic congestion and other more specific changes.

Parking was cited by many respondents as being a problem and while the parking facilities are being improved, it is possible that the advances are not occurring as fast as the numbers of tourists entering the area are increasing. In previous years during the Rose Festival the Brandon car park was taken over by the Festival Dome and the Quinnsworth car park by the Birds' Amusements. This left the multi-storey car park as the only large scale park that was available for cars. This situation should improve somewhat since the Brandon's new conference centre will now be the location for the Rose selection and so free up the Brandon car park.

Note the Annual Average Daily Traffic statistics on Page 57.
7.5.2.4 Investment Incentives and Fiscal Control:

The investment side of this coin has the "carrots" and could include grants towards capital costs, loans at nominal rates of interest, preparing sites, access and other utilities provided free, nominal rents for sites in the initial years, tax concessions, subsidies towards local labour or training provision. While the grants that have been available to the tourism industry in the area over the last decade is likely to continue only at a very reduced rate post-1999, there are many other options available to the public sector. Tax concessions towards the establishment of environmentally-friendly practices and the provision of employment should come much higher on the priority listing since the Government would potentially receive more in the long-term than it would concede in the short-term, due to the benefits of higher-yielding tourism products and the multiplier effect of creating further employment.

Fiscal controls would be the "whip" and include local taxes and rates. What is important here is that there is a growing cognisance of the principle that whoever is causing pollution should pay for it. While much of the asset base of the tourism industry has until now been provided free of charge (such as the beautiful scenery in Kerry), it is quite possible that if it is threatened by over-development of tourism, then there could be business charges for the tourism use of these environmental resources. World-wide this is becoming more acceptable but would be much less likely to occur if the tourism industry was taking its own steps to enhance these resources.

7.5.2.5 Demand Influence:

One of the more obvious demand influences is directly through price. This includes setting the charges, e.g., into the publicly-run attractions or car parking fees. Another way is through Aer Rianta airport charges. An argument has been put forward for the reduction of charges for airports outside of Dublin to encourage passengers to use airports other than Dublin due to the massive problem of traffic congestion in the
capital and to aid in the regional distribution of income. So far nothing has transpired from this argument.

The issuing of licences for fishing, shooting, pubs, and taxis all have a regulating influence. It has to be said that the large volume of unofficial accommodation in this country is a reflection on the government's unwillingness to impose their own system and becomes an obvious development in ensuring sustainable practice. It is one of the greatest threats to the tourism industry due to the provision of a sub-standard product in many cases.

"There is a huge amount of accommodation available to the public which is not registered or noted or visible anywhere other than the fact that a sign appears the first week in June and disappears maybe the week after the (Rose of Tralee) Festival."

   Accommodation Provider.

This is driven by the black economy, by cash into the hand and straight into the pocket. It can only be successfully tackled at Government level, and the Minister for Finance has made it clear that he is not interested in chasing Bed and Breakfast operators down the by-roads or streets of Ireland.

Increasingly, the public sector, both at national and regional level, are involved in marketing efforts. It includes brochures before a visit and other brochures on arrival at the destination. The Tourist Office is another public sector funded provision. This whole area is dealt with in greater detail in Chapter 8.

7.5.2.6  Local Government Development Attitudes:

This whole area has seen a definite shift in approach over the last fifty years, and it is especially pronounced over the last twenty years. This is not due to tourism, but has a big impact on it.
The main objectives were previously based on regulation and control, and have now become more focused on overall area development plans, with emphasis on quality of life and sustainability. The main procedures have evolved from a control perspective to one of partnership development with the private sector, utilising Environmental Impact Assessments, multi-funding packages and joint planning. The whole ethos has grown from being independent, protective, reactive and quite inflexible, to a perspective which is biased towards facilitating and enabling, is proactive, innovative, and seeking partnership with the private sector. A difficulty here is that some public sector managers, especially those who trained in the older school and do not embrace change, have remained introspective and become frustrated with their loss of control.

Looking at the powers of the public sector that have been mentioned, it is obvious that they can be very influential on decisions coming from the supply-side and thereby can indirectly shape demand, especially in the case of a town like Tralee where tourism development is still in its early stages. The influence can be so consequential - it can decide matters such as quality and capacity - that it is essential that their decisions are in partnership and are well informed from a tourism point of view.

7.5.3 Private Sector Role:

7.5.3.1 "The Untouchables":

The private sector is the area over which least control can be exerted in relation to sustainable practices, and this is especially true for smaller businesses. They see themselves as being too small to individually have a significantly negative impact on their environment and, due to minimal prospects of third party scrutiny, concentrate on the short-term gains. An approach to addressing this problem needs to include an educative process, to impress upon businesses, large and small, the benefits that accrue
from a sustainable approach. These can be quite numerous and according to Middleton\textsuperscript{74} include:

- Compliance with the law, in relation to safety and health measures and environmental protection codes which are now globally recognised.
- Avoidance of negative Public Relations, due to media exposure of pollution and the consequent loss of customers.
- Meeting growing customer expectations and demands, such as better quality and value for money. These are vital in the retention of loyalty.
- Achieving competitive advantage, through meeting standards ahead of compliance, or by focusing on what the tourism customer is seeking - an "added environmental benefit" outlook as opposed to meeting conditions such that the "eco" label can be attached.
- Reducing operational costs by efficient use of energy, waste treatment and re-use.
- Maintaining good-neighbour policies locally, which is most useful when looking for planning permission or workers.
- Meeting more stringent conditions when sourcing new business. More and more suppliers of tourists, e.g. tour operators, are writing environmental good practice criteria into the contracts so that they in turn can make guarantees to their customers regarding quality. If these criteria cannot be met by tourism suppliers in Tralee, then the business is lost.
- Conservation of business assets and resources, since they are the corner-stone of future profits. For tourism related businesses more so than any other, the environment is a vital asset and has to be maintained and upgraded in this light. For instance, the appearance of the algae bloom in one of Killarney's lakes in 1997 was as a result of the rapid growth in tourism development. This threat to a most scenic but vulnerable area may only be the tip of the iceberg. There is the more intangible threat to 'the people and the culture by modernization which can lead to

a homogenization with the dominant Western culture. These are probably the resources that will prove most difficult to preserve, especially now with the strengthening powers of the EU.

This "enlightenment" would be best achieved through trade associations and the procurement policies of larger concerns. The aim should not be to negate the entrepreneurial drive of the private sector, but rather to harness it.

7.5.3.2 Quality:

Through necessity there has been a shift in attitude from counterproductive competition on price to competition on quality of environment and value added. One should keep in mind that it is visitors' perceptions on quality of the environment that dictates their economic contribution to the area.

It was felt that no matter what business anyone was in, quality has to be a priority. The whole tourism industry is very fragmented and this leads to difficulties in setting standards. The smaller operators need to be brought into the net through participation in courses to ensure the quality of what they do and to improve their business. Any long term business has to give quality in product or in service or in location or in premises. The Chamber of Commerce is running a programme called "Customer Care Awards" and it is possibly the only programme of its type in the whole country.

"The idea behind it is to recognise not the manager or manageress or owner/proprietor who is running the quality business, but to recognise the staff who, at the end of the day, are at the coal-face of dealing with the customers."

Member of the Chamber of Commerce.

Last year was its first year and this year it is incorporating the public sector as well as the private sector. It is open to anybody who comes in contact with a customer, whether it be a tourist or a regular patron. In many instances the only differentiation in product at the end of the day tends to be the people selling it as what makes people return is human contact. It is especially central to the tourist experience.

There are many sound business reasons for adopting a sustainable approach in tourism:

- The tourism area has massive potential for growth due to reasons such as global population growth, holidays and travel are seen more as a necessary part of life as opposed to an elitist privilege, and increases in the statutory minimum annual holiday leave. This means that the quality of the environment will be under greater threat and the onus is on members of the tourism industry to take responsibility for it, preferably for altruistic reasons, but at any rate for their own long term economic success.

- Due to information technology and present-day transport systems there is virtually nobody unaffected by tourism. The different sectors of the tourism trade in Tralee collectively have two options. The train which is the inevitable process of environmental change - physical, social and cultural - is pulling out and they can decide to drive the train, influencing and controlling events, or they will find themselves standing on the platform waiting for the next train which will be driven by regulators and anti-tourism lobbies.

- Tourists literally have a world of choice. Research into demand patterns of tourists in eight European countries\(^\text{76}\) showed that the majority of visitors want to experience clean air, enjoy nature, and visit unspoilt, uncongested, pollution-free destinations. If these are not offered in Tralee, being lost through inaction or the process of inappropriate development or over-development, the tourists will find them somewhere else. This in turn leads to lower prices, lower quality and a cycle that may be irreversible.

\(^\text{76}\)Aderhold, P., 1995, Bureau of Tourism Research and Planning, Denmark.
• Good environmental practice in certain areas saves money through greater overall efficiency. Any reduction achieved in fresh water usage, e.g., by a hotel, lowers the water rates bill while also providing the manager with a useful marketing tool. Similarly, less frequent washing of the bed linen of visitors staying for a number of nights reduces laundering costs.

7.6 Employment and Social Environment:
As already stated there was a broad consensus that it is human contact that will win repeat business.

"It is a service business and service businesses really rely on people and professionalism".

Education Provider.

7.6.1 Community Involvement:
There is a global re-emergence of communitarianism - a demand for a say at different levels and especially in relation to local government and local development. This has been recognised at EU level where many of the structural funding projects had to incorporate a bottom-up approach or the funds would not be released. Communities have been working collectively and it has not been a matter of just cosmetic coordination or consultation but rather genuine participation and empowerment.

It is not sufficient to look at tourism as something that shapes itself in isolation from the community in which it is based. One has to realise that unless it benefits the whole community, it will not be sustainable in the long term. With the growth in special interest tourism there is a more active and conscious involvement of the visitors with the host community and the visitors do not want their experience to be gained at the

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77Crickley, S., 1998, Local development and local governance challenges for the future, *Local
development in Ireland*, Community Workers Co-operative, Galway.

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expense of degrading the quality of the destination's socio-cultural and natural environment which made the experience possible.

Ethnic tourism, for instance, can turn cultures into commodities through presentations and people into objects, and as their novelty wears off it becomes apparent that the cultural presentations bear no relation to the real everyday culture and the tourists move on. Therefore a code of ethics needs to be adopted by both the tourists and the product providers to facilitate respect for the host community. Destruction of this asset in the tourism base can only lead to the decimation of the local tourism industry.

Over the past seven years there has been real growth in the tourism industry and this has given great hope to some of the communities in public housing where there is a very high rate of unemployment and many young people at risk of dropping out of school, of drug abuse and of involvement in crime. One of the problems in Tralee is that there has been a failure in converting part-time jobs into full-time jobs for many of the young people. There certainly needs to be much more effort put into the facilitative organisations.

For instance, the restaurant that treats its staff well has a nicer atmosphere and this in turn makes the visitor's experience more enjoyable. The success of tourism in the long term depends on how 'healthy' the town is as a whole, i.e., economically, socially and culturally. This aspect is not being addressed sufficiently at present.

"Tralee is not a healthy whole town because one of the outcomes of the very rapid growth in tourism is the divide between those people experiencing quite extreme poverty in the town and the people that are getting very wealthy from tourism has widened".

Social Worker.

It is questionable whether or not growth has had any impact on the long term unemployed. Some families are now second and third generation unemployed and if
they are not included in the benefits from tourism, this will serve to increase the levels of juvenile crime, the cleanliness of the town and the overall atmosphere, all of which have a major role to play in tourism.

7.6.2 Labour Shortages:

At present the industry in Tralee, as elsewhere, is meeting with shortages in certain categories of personnel. This cannot be overcome easily since there appear to be some fundamental structural problems. C.E.R.T. commissioned research in 1996, which found that three-quarters of workers in the tourism industry earned less than £10,000 while the average industrial wage was £14,000. On top of that the hours worked were both long and unsociable in areas such as cookery and bar service in hotels. In a separate report that was commissioned by CERT it was found that the tourism industry had a poor image among secondary school leavers and among their teachers. In general the career advisers did not view tourism as providing suitable careers for the better students and so did not even distribute the tourism career information until after the annual university applications' deadline. Less than one in fourteen students were interested in tourism as a career. Much work needs to be done to create an attractive career progression path for entrants to the industry since students place a significant importance on this factor also. The image that prevails at present needs to be changed through improved working conditions and promotional opportunities. There is a need too to draw a distinction between providing a good service and servility in the days of landlords' big houses. The servility is a part of our Irish heritage that has not been fully laid to rest.


Having contacted B. Fagan, PRO for the National Institute of Guidance Councillors, on this issue it was pointed out that the CAO deadline is 1st February but the first of the recruitment information does not arrive to the secondary schools from CERT until the second week in February.
The private sector sees employment equality in the community as an ideal that cannot be achieved because there are jobs for different people, requiring different levels of skills and experience, and therefore there are different levels of remuneration.

"Socially responsible employment is something that everyone would like to see, but there is a huge affordability difficulty."

Hotelier.

7.6.3 Work Schemes:

The social employment aspect of FAS schemes came in for strong criticism. These schemes were cited as being the source of much of the dissatisfaction with entry level jobs in the tourism industry.

"People talk about getting £180 a week for working week-on, week-off and doing nothing.......Even if they got a half decent job paying maybe £120, £130 a week, they're disgruntled.......Where that culture is allowed to develop, the kids, in my opinion, are being poisoned - their minds are being poisoned and they don't have the chance to develop."

Hotelier.

Many of the start-up schemes preclude any business that cannot commit to fifty two weeks continuous employment. Approximately half of the hotels in the country are seasonal and as a result are excluded or have grave difficulty in participating in the schemes. This has obviously excluded many young people from it.

"It is a very labour intensive industry and will remain so."

Hotelier.

7.6.4 Street Theatre:

The whole idea of street theatre, mime, and special evenings was proposed as the way forward for Tralee. Such street activity during the summer would be very suitable in tandem with late shopping. The extra added value would be that if it was an extension
of Samhlaiocht Chiarrai it would involve the local community and provide a community basis for these activities. This type of idea is well worth encouraging and resourcing.

7.7 Special Interest Tourism:

There has been a fundamental change occurring in the tourism market over the last twenty years with the development of different patterns of tourist consumption.\(^1\) There is a move away from travel for relaxation, towards travel as an opportunity for new experiences. For the tourist on a special interest excursion it is important to keep in mind that special interest activities are normally the most important element of the travel experience and other aspects are built around it. The tourist wants to be enriched by "greater integration with the place visited and fuller involvement in the social and cultural life of the holiday destination"\(^2\)

These tourists are interested in 'serious leisure'\(^3\) and are looking for a pay-off, be it personal fulfilment, self-actualisation or self-expression. Special interest activities may require particular knowledge, training or skill for participation. They tend also to identify strongly with their chosen activity. As a result cultural and nature-oriented tourists advocate sustainable practices and the nurturing of a mutually beneficial relationship between themselves and the physical, social and cultural environment which they are visiting.

There are numerous special interests that could be catered for in the Tralee area which presently are not. By choosing to cater for special interest tourists the locals may gain an input into the type, scale and rate of tourist development and into the type of tourist

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that is encouraged to visit. These tourists are also the most likely to accelerate the move towards sustainable tourism through their own example.

Special interest activities are market-led products, which have a high degree of differentiation and so possess competitive advantage, thereby drawing out private capital and encouraging entrepreneurial spirit.

7.7.1 Cultural tourism:
One of the largest segments within special interest tourism is cultural and heritage tourism. Culture has become a major motivator of international travel through a greater awareness that has been brought about by improved technology, better information transfer and slowly increasing educational levels. Globally there has been a standardisation of many goods and services. As a backlash to this tourists are seeking diversity, and culture is a natural choice to alleviate this need. In Tralee cultural tourism has already become integrated into the mainstream tourism industry and is seen as a vital component of it. Further development in this area provides an opportunity for the local tourism industry to improve on one of its strengths. Therefore there is a need to identify niches in this market that lack suitable tourism products and then ensure that these products are developed. For instance there are insufficient products that engage the tourists in cultural activities. At present the visitors are gaping at the local culture in terms of exhibitions and presentations, when they would internalise it much more if they themselves were actively involved whether through music, dance, song, the Irish language or events and festivals.

7.8 The Lee Valley Development:
The Aquadome is the first stage in the development of the Lee Valley as outlined by Ventures Consultancy Ltd. in their proposals in 1994. The consultants recommended the development of a lagoon and smaller leisure pools for water-based leisure activities such as sailboarding, dinghy sailing, canoeing, rowing, model boats, power crafts,
pedal crafts, fun crafts and a radio controlled model boat circuit. None of these activities need large water spaces and once the right balance is struck in offering the visitor a variety of options, e.g., different levels of skill and time availability, then it can be a diverse yet compact water park.

Some of the other elements of the development are accommodation, which includes self-catering and a caravan park. Catering on-site is also suggested. The proposals lend a heightened degree of attractiveness to the steam train on one side and the boat trip by canal on the other. The overall plan is appealing to the local community due to the final obliteration of the town dump that had such a negative impact on the environment in the area for so many years.

7.9 **Conviction:**

It was pointed out that people should be more confident of their town's worth. The town is no longer a 'poor relation' in tourism terms and many representatives from towns around the country visit Tralee to gain an insight into what the people there are doing to achieve the levels of tourism growth which has been experienced in recent years.

"There's a great need to talk more positively about our town."

Regional Body Representative.
Chapter 8

Marketing - the Way Forward

8.1 Introduction:
Given the stage in its development at which Tralee is now positioned on the road to being a well recognised tourist destination, it is imperative that it incorporates a marketing perspective. This necessitates empathising with the customers so as to identify, respond and adapt to their needs and wants, which are prone to continuous change, ahead of competitors. There was a certain comfort in businesses that looked at the accounting ratios that were thrown up by the previous years accounts after which it was decided to increase the budget in line with inflation along with dragging another percentage up into the profit zone. The whole exercise was inward-looking, historically based, and short-term in outlook. In today's scenario where the tourism industry itself is continually evolving this is a sure recipe for failure.

One of the inspiring aspects of change is that it requires new approaches and innovative rational. One of the advantages of a research project such as this is that by accumulating and evaluating information on tourists' changing needs, the local tourism industry is better positioned to adopt the proper response.

For survival, tourism businesses must:

- Look to the future, interpreting trends in the overall business environment that includes customers, competitors, and other aspects of the physical, social and cultural environment. Improved marketing intelligence can reduce the impact of changes in the market by anticipating them and planning accordingly. It is the only realistic basis for promotion as well as product development. Yet there are no figures for the volume or the value of tourism in Tralee.
- Be customer-responsive, with decision-making based on research and information.
• Emphasise quality in product and business operations, while delivering added value.

• Sustain and regenerate the asset base. Any manufacturing plant in the Tralee area or anywhere else realises that if the premises is not maintained and sometimes renovated, then the asset base will be depleted. The important reasons why tourists come to the area include the beautiful scenery, the friendly people, and the culture such as Irish music. Should the quality of these vital pillars of the tourism industry's asset base be allowed to deteriorate, it could be a severe and even fatal blow to the long-term prospects of tourism in the area.

• Be proactive in forging new forms of partnership between the private and public sectors, between large and small businesses, and between economic and social representatives.

8.2 Market Research:

The first move is to discover what will satisfy the customer before determining how people in the tourism industry in Tralee can then achieve this and be left with a profit. The information needs to be accurate and timely. An advantage of identifying target markets is the possibility of tailoring the tourism product, its price and promotional data to the particular market. Therefore research of the market needs to highlight who the target market is, the benefits they enjoy/should enjoy when visiting Tralee and what makes/should make Tralee a better destination than others.

The positioning of Tralee involves its arrangement as a clear, distinctive and desirable place in the minds of its customers relative to other destinations. A tourist will not leave Tralee and do a detailed critique of the different aspects of its tourism product. Rather, the 'product covers the complete experience from the time he/she leaves home until he/she returns to it'\textsuperscript{84}. Therefore it is the overall visit to Tralee that will be rated,

so there is a need for those in the trade to be in a position to evaluate and improve their own particular input to this complete experience and encourage others to do likewise. It is this striving for differentiation on quality that lies at the heart of the information gathering, appraisal and subsequent dissemination.

8.3 Tourists' Opinions:

8.3.1 Good Aspects:

Table 8.1

<table>
<thead>
<tr>
<th>Good Aspects of Tralee Visit.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aspects</td>
</tr>
<tr>
<td>Scenery</td>
</tr>
<tr>
<td>Nice Park</td>
</tr>
<tr>
<td>Friendly People</td>
</tr>
<tr>
<td>&quot;Everything&quot;</td>
</tr>
<tr>
<td>Good Facilities for Children</td>
</tr>
<tr>
<td>Nice Restaurants or Pubs</td>
</tr>
<tr>
<td>Good Shops</td>
</tr>
<tr>
<td>Good Attractions</td>
</tr>
<tr>
<td>Good Facilities for Entertainment</td>
</tr>
<tr>
<td>Atmosphere and Layout of Town</td>
</tr>
<tr>
<td>Good Activities</td>
</tr>
<tr>
<td>Relatively Quiet</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>Missing</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

158
The interviewees were asked to comment on the good aspects of their stay in the Tralee area. Some of the answers are as expected but there are some surprises also. This was an open-ended question so the responses were many and varied. Table 8.1 summarises the frequencies of the good aspects.

Some respondents were very pleased with their over-all holiday and without being specific simply stated that they were happy with everything. This response from 1 in every 7 that answered the question is a source of satisfaction for anyone involved in the tourist trade in Tralee. As expected both the scenery and the people score well at over 20% and the town park was also mentioned by many of the respondents. It has to be taken into account that many of the interviews took place in close proximity to the park but even so, it left a favourable impression.

At the other end of the scale, only four respondents saw the town as being clean, three thought that the flow of traffic was acceptable, two thought that the town has a good information office and last but by no means least, one respondent believed that the town had a "clever parking system". Again, given the location of many of the interviews, it is disappointing that the attractions did not feature more strongly in the replies.

8.3.2 Bad Aspects:
While 181 of the interviewees expressed what they saw as the good aspects of the town, 79 took the opportunity to voice their opinions on the bad aspects. Their responses present an opportunity to examine the potential weaknesses in the tourism product and how it might be improved. 30 bad aspects were mentioned but many of these were only mentioned by one interviewee so they are excluded from Table 8.2.
### Table 8.2

**Bad aspects of Tralee Visit.**

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traffic</td>
<td>24</td>
<td>30.4</td>
</tr>
<tr>
<td>Poor Parking</td>
<td>15</td>
<td>19.0</td>
</tr>
<tr>
<td>Bad Weather</td>
<td>7</td>
<td>8.9</td>
</tr>
<tr>
<td>Expensive</td>
<td>7</td>
<td>8.9</td>
</tr>
<tr>
<td>Sign posting</td>
<td>6</td>
<td>7.6</td>
</tr>
<tr>
<td>Tourist Information</td>
<td>4</td>
<td>5.1</td>
</tr>
<tr>
<td>Not Enough for Children to do</td>
<td>4</td>
<td>5.1</td>
</tr>
<tr>
<td>Roads and Streets</td>
<td>4</td>
<td>5.1</td>
</tr>
<tr>
<td>Annoyed by Begging Travellers</td>
<td>3</td>
<td>3.8</td>
</tr>
<tr>
<td>Seating at Bus Station</td>
<td>3</td>
<td>3.8</td>
</tr>
<tr>
<td>Hotel Accommodation</td>
<td>2</td>
<td>2.5</td>
</tr>
<tr>
<td>Toilet Facilities</td>
<td>2</td>
<td>2.5</td>
</tr>
<tr>
<td>Lack of Dustbins</td>
<td>2</td>
<td>2.5</td>
</tr>
<tr>
<td>Other</td>
<td>16</td>
<td>20.3</td>
</tr>
<tr>
<td>None</td>
<td>34</td>
<td>-</td>
</tr>
<tr>
<td>Missing</td>
<td>177</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>310</td>
<td>125.5</td>
</tr>
</tbody>
</table>

Most of the respondents that answered this question gave only one bad aspect, and most of the complaints deal with the infrastructure. Traffic and parking, which are interlinked, account for two fifths of all complaints. It seems that for the one respondent who thought that Tralee had a clever parking system, there are 15 others whose experience leads them to believe that it is so clever they can't figure it out!
The sign posting was found to be inadequate, not to mention the added problem of their being erected on round poles, allowing them to be turned in any direction by idle hands. The sub-standard toilet facilities and lack of dustbins are criticisms that need to be addressed. During recent months the main public toilets in the town park have undergone substantial renovation including a stone-wall exterior. The seating at the bus station was found to be inadequate and tourists found the presence of begging travellers quite disconcerting.

8.3.3 Revisit or Recommend:

95.4% of the interviewees expressed the opinion that they would visit Tralee again while 96.8% would recommend Tralee to their friends. This is a powerful vote of confidence in what the town has to offer.

The vast majority did not give reasons for their views because they would be duplicating information already expressed. To summarise the reasons expressed, on the positive side Tralee would be revisited or recommended to friends due to the present visit being enjoyable, relatives living in the area, an already established habit of visiting the area, the friendly people, the children liking it or just that it is a nice place. On the negative side, it would not be revisited or recommended due to the intention to visit other parts of the country, "not much to do", the length of the journey in getting to Tralee (experienced by Antipode), or the rudeness of the people (this response was from an English visitor who suffered racist comments).

8.3.4 Suggestions for More Enjoyable Stay:

The biggest obstacle to a more enjoyable stay in Tralee was the weather but regretfully it is the one over which anyone can exercise the least control. It highlights the importance of the all-weather attractions in the area. Improvements to the traffic flow was next. The trouble with this is that if tourism in the area expands further, then the traffic will become even more of a problem.
Table 8.3
Suggestions for More Enjoyable Stay.

<table>
<thead>
<tr>
<th>Suggestion</th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better Weather</td>
<td>13</td>
<td>18.9</td>
</tr>
<tr>
<td>Less Traffic</td>
<td>6</td>
<td>8.7</td>
</tr>
<tr>
<td>More Teenage and Kids Activities</td>
<td>5</td>
<td>7.3</td>
</tr>
<tr>
<td>Less Expensive</td>
<td>4</td>
<td>5.8</td>
</tr>
<tr>
<td>More Tourist Information</td>
<td>3</td>
<td>4.3</td>
</tr>
<tr>
<td>More Sign posting</td>
<td>3</td>
<td>4.3</td>
</tr>
<tr>
<td>More Pubs Suitable for Kids</td>
<td>3</td>
<td>4.3</td>
</tr>
<tr>
<td>Better Accommodation</td>
<td>2</td>
<td>2.9</td>
</tr>
<tr>
<td>Cheaper Accommodation</td>
<td>2</td>
<td>2.9</td>
</tr>
<tr>
<td>More Fish Shops</td>
<td>2</td>
<td>2.9</td>
</tr>
<tr>
<td>More Night-clubs</td>
<td>2</td>
<td>2.9</td>
</tr>
<tr>
<td>Longer Licensing hours</td>
<td>2</td>
<td>2.9</td>
</tr>
<tr>
<td>Pedestrianise Town-centre</td>
<td>2</td>
<td>2.9</td>
</tr>
<tr>
<td>Camp-site Nearer Town</td>
<td>2</td>
<td>2.9</td>
</tr>
<tr>
<td>Other</td>
<td>14</td>
<td>20.3</td>
</tr>
<tr>
<td>Nothing</td>
<td>4</td>
<td>5.8</td>
</tr>
<tr>
<td>Missing</td>
<td>221</td>
<td></td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>290</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>

8.4 Local Tourism Industry Opinions:

8.4.1 Why Guests Visit Tralee:
The accommodation providers were asked why their guests were visiting the Tralee area and the responses are shown in Table 8.4.
Table 8.4
Reasons Why Guests Visit Tralee.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Number</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touring base</td>
<td>27</td>
<td>59</td>
</tr>
<tr>
<td>Good attractions</td>
<td>22</td>
<td>48</td>
</tr>
<tr>
<td>Stop-over en route to Dingle</td>
<td>9</td>
<td>20</td>
</tr>
<tr>
<td>Close to all amenities</td>
<td>4</td>
<td>9</td>
</tr>
<tr>
<td>Business</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>Weddings</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>Friendly Guest Houses</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Rose Festival</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>72</strong></td>
<td><strong>158</strong></td>
</tr>
</tbody>
</table>

Over 60% of all reasons given by the accommodation suppliers involve either Tralee being used as a touring base, or the utilisation of its attractions. These reasons were offered far more frequently than any other, and are all the more explicit given that this was an open-ended question and so again no particular answer was prompted. The third most common answer was the use of Tralee as a stop-over on the way to Dingle. It is necessary to clarify that those whose visit is 'business related' are travelling representatives, and are not connected to conferences, a source which is conspicuous by its absence. Many other reasons were given but by not more than one respondent in each case. One of the more thought-provoking answers was because Tralee is at the end of the railway line!

8.4.2 Enhance Tourism Business in Tralee:
The accommodation providers were asked to make suggestions regarding what would enhance business in the area and were very forthcoming with ideas. Many were quite
specific so in some cases they have been grouped into more general categories in Table 8.5.

<table>
<thead>
<tr>
<th>Step</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve Infrastructure</td>
<td>24</td>
</tr>
<tr>
<td>Cleaner Environment</td>
<td>22</td>
</tr>
<tr>
<td>Sunday and Late Night Shopping</td>
<td>22</td>
</tr>
<tr>
<td>More Attractions and Facilities</td>
<td>16</td>
</tr>
<tr>
<td>Better Parking</td>
<td>8</td>
</tr>
<tr>
<td>Charge Less</td>
<td>8</td>
</tr>
<tr>
<td>More Traditional Irish Music</td>
<td>5</td>
</tr>
<tr>
<td>More Promotion</td>
<td>5</td>
</tr>
<tr>
<td>Kerry Marketed as One</td>
<td>5</td>
</tr>
<tr>
<td>Ensure a Warm Welcome for Tourists</td>
<td>5</td>
</tr>
</tbody>
</table>

One third of the respondents suggested improvements to the infrastructure and especially parking. This has been dealt with already in Chapter 6 and helps to reiterate the obvious. The creation of footpaths or walks through local wooded areas such as Ballyseedy were suggested.

It is encouraging also to see that the environment is high on the list of priorities for the accommodation providers. Specific measures to improve the physical environment included a more concerted effort in the Tidy Towns competition, the removal of derelict sites and a greater visual impact created by more flowers and hanging baskets.
The late shopping has a high response rate given that this was an open question and therefore the answer was not prompted.

In terms of attractions the need to enhance and add features to the steam train package was mooted along with the possibility of extending the journey to Fenit. A visiting consultant is accredited with the statement that this extension has the potential of being seven times more boring than the present trip since it is approximately seven times longer. Boat rides on the canal were suggested and this is likely to come into being within the next few years. The canal has already been cleaned up and there is the intention of making the journey out to Blennerville by steam train and the return journey by boat on the canal or vice versa.

The accommodation providers together with the tourists vouched for more and better nightly entertainment with a greater emphasis on traditional Irish music. Since the public houses are unlikely to provide more Irish music because of a fear of losing their local custom some other avenue has to be explored to satisfy this demand.

8.4.3 Focus Group on Marketing:

8.4.3.1 ‘Marketing’ equals ‘Promotion’:

The general perception was that Tralee was not 'marketed' enough. The main problem was that the marketing referred to was not actually marketing but rather one of its components, i.e., promotion. There is such a concentration on promotion within marketing that the other components of it are not even acknowledged. Yet many features of a marketing approach to tourism have been put in place.

8.4.3.2 Information Points:

It is extraordinary that some of the main arrival points into Tralee do not have an information point to promote the town. The bus or train station would benefit from
such an independent tourism presence since it would augment the service which Bus Eireann and Iarnrod Eireann give to their customers. The advantages have been realised and those concerned are willing to support such a development. It was stated that the days of mutual exclusivity belong in the past and that all parties can share in the synergistic benefits of co-operation. In 1997 Tuatha Chiarrain offered to support a tourist information office or tourist information point at the Kerry Airport. The Airport Authority did not take up the offer. It is surprising since it is such a major point of entry to the whole county that they are not interested in becoming more customer-friendly. The offer is still open.

8.4.3.3 Price Driven:

The overseas tourism marketing initiative by Bord Failte right across North America and most of Europe is primarily price driven. As a result tourism in Ireland is competitively priced across the board.

"I can say without contradiction that 1999 will be the first time in the last five years that Tralee is losing accommodation business to Killarney on price."

Hotelier.

This means that where a tour operator, for instance, has an opportunity to book accommodation in Killarney rather than Tralee and at a better price, then he would consider himself to be on a win-win scenario - Killarney is still a better recognised destination internationally and now he is getting a price premium to go with it.

8.4.3.4 Co-operation:

The accommodation providers recognise that they benefit most by selling Tralee as a destination and as a result they will sell their own accommodation base. However, Tuatha Chiarrain is the partnership group in charge of the distribution of LEADER II funds in the Tralee, Castleisland and Listowel districts in Kerry.
there is the problem that a great deal of hard work is put in by a core group of people while there are sectors of the town that participate in nothing. The Rose of Tralee Festival is highlighted as a prime example. Those that contribute nothing are also benefiting and this is very evidently begrudged.

"There are a lot of people that are free-loading."

Regional Body Representative.

There are advantages to be enjoyed with the tourism enterprises pulling together and marketing the whole thing as an integrated package. At least one hotel has heads of agreement in place with all of the visitor attractions so that when it goes out to sell, it is able to go to the market with a full package and the outside operator can deal with one provider. The attractions also have agreements where if someone visits one attraction, they get a discount for another one.

8.4.3.5 Differentiation:

Essentially the competition is with destinations in Kerry and then within Ireland as a whole. This only leads to a displacement effect within the national economy, and in the long run it would be more effective for the tourism trade to concentrate on the differentiation of the product that they have to offer and thereby develop a new market.

"You're not re-inventing the wheel, you see what gap is in the market, address that, and build your own niche."

Attractions' Manager

8.4.3.6 Holiday Tralee Ltd.:

"Holiday Tralee is the obvious way forward."

Accommodation Provider
Holiday Tralee Ltd. comprises a number of tourism businesses in the town. Over the last five or six years new businesses joined and others dropped out, but many of those presently involved in it believe that it is the most appropriate marketing tool for the future. There will always be those that perceive that they do not receive their fair proportion of the gain.

Currently Holiday Tralee is producing a 32-page full colour glossy brochure on Tralee, which will be aimed primarily at the visitor who has already chosen to come to the town. 30,000 copies are being printed and about 10,000 of those copies are being set aside and will be used for the marketing of the town at holiday fairs.

"We're going to fund that brochure this time on a purely advertising basis. If you contribute, you are buying advertising space in it."

Hotelier.

8.4.3.7 Sustainability:
Marketing was not seen as an effective management tool for aiding sustainable tourism. Its value was not highlighted in alleviating congestion and dispersing visitors to localities that could cope best with large numbers. There was no suggestion that sustainable tourism be used as a marketing tool to encourage more visitors of the kind who appreciated environmental quality. However, the need for education about sustainability and respect for the environment was strongly felt in the group.

8.5 Marketing Research of Hotels:
The hotel managers were asked whether or not they carried out market research and all answered in the affirmative. Most examined their own records and made their own observations. Some examined government information and others either did their own marketing survey or hired a marketing research agency.
8.6 Marketing of Kerry:

Currently the northern half of Kerry is marketed by the Shannon Free Airport Development Company (SFADCo) and the southern part by Cork/Kerry Tourism. In the accommodation survey, while an overwhelming number of guest house / hostel operators (95%) believe that Kerry should be marketed as one, this opinion is shared by only 50% of hoteliers. However, all but one of the hoteliers were in favour of the segregation just three years earlier\(^8\).

A few reasons are given for the two parts of the county to continue being marketed separately. One is that Killarney would enjoy the lion's share (stated by 4% of respondents), and another is that there is greater diversity at present (4%).

The reasons for Kerry to be marketed as one were more numerous. These are set out in Table 8.6.

<table>
<thead>
<tr>
<th>Reason</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>The present situation is confusing to the visitor</td>
<td>25</td>
</tr>
<tr>
<td>Kerry is too small to be marketed separately</td>
<td>25</td>
</tr>
<tr>
<td>Better overall benefit to the county</td>
<td>21</td>
</tr>
<tr>
<td>At present Tralee and North Kerry are linked to locations which are</td>
<td>13</td>
</tr>
<tr>
<td>too distant, e.g., South Offaly</td>
<td></td>
</tr>
<tr>
<td>Kerry has enough facilities on its own</td>
<td>8</td>
</tr>
<tr>
<td>Tralee is a perfect stop-over for touring the Cork / Kerry Tourism</td>
<td>4</td>
</tr>
<tr>
<td>region</td>
<td></td>
</tr>
<tr>
<td>As a result of the split, marketing is not well organised at present</td>
<td>4</td>
</tr>
</tbody>
</table>

There are many important points raised. The two regional organisations that are marketing the county are not displaying the required level of integration in their activities to provide their customers with quality information. A glaring example of this lack of co-operation is evident in a visit to the Tralee Tourist Information Office. On the wall is a large and detailed map of the Shannon region. The touring routes which are of most interest to tourists in Tralee would obviously be the nearest ones - the Dingle Peninsula, the Ring of Kerry and the national park area in Killarney, and these are not on the map. It places the emphasis on what the Shannon Region has to sell as opposed to what the customer is looking for. Even if the Tralee office's promotion of areas in the Cork/Kerry region is not reciprocated by the Killarney office, for example, it is imperative that in Tralee the customer comes first. This is the only acceptable ethos for Tralee's tourism industry.

The present split in the county has resulted in a fragmented promotional drive with many organisations trying to eke out their own justification for being there. The impact of their literature has been mainly local and so only achieves displacement as opposed to an increase in market share. They need to be brought together under the one banner and thereby realise sufficient funding to accomplish a promotional campaign that is successful in attracting new visitors to the county, rather than squabbling over the ones that are already there. Each of the tourist destinations within the county could have their own section in a comprehensive brochure which could be placed in appropriate overseas target markets to good effect.

8.7 Discovering Tralee:
Before any decisions can be made on the most productive promotional mix it is imperative to gather information on how and where tourists become aware of Tralee.

8.7.1 Heard of Tralee Before Coming to Ireland:
The overseas tourists were asked whether or not they had heard of Tralee before they arrived in Ireland.
Table 8.7

<table>
<thead>
<tr>
<th>Heard of Tralee Before Coming to Ireland.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
</tr>
<tr>
<td>Not Applicable / Missing</td>
</tr>
<tr>
<td>290</td>
</tr>
</tbody>
</table>

Table 8.7 shows that at least 40% of the visitors did not come to Ireland with the intention of visiting Tralee. How could they? They had never heard of it! Until recent years there was no good product basis for marketing Tralee as a tourist destination due to a lack of activities and attractions to occupy the tourists. In fact it was to the town's benefit that it was not marketed since it would have proven to be a non-memorable experience for the visitors and they would not have been recommended to others. This situation has now been rectified. Tralee can now be marketed as an attractive tourist destination. There is room for improvement and more attractions in the pipeline, but many of the visitors to the area have given feedback that they enjoyed their experience and so the town is ready for and needs major promotion overseas.

8.7.2 How Became Aware of Tralee:

Methods and sources by which visitors became aware of Tralee are shown in Table 8.8. Brochures have succeeded in making Tralee known to the largest portion of the foreign visitors to the area but this is very closely followed by the Rose Festival.
It is gratifying to see also that over one in every five are made aware of what Tralee has to offer by travel agents. Friends and relatives account for one in every six. This, while relatively low, is not surprising given that Tralee is a relatively new tourist destination as opposed to the longer established ones like Killarney.

### 8.7.3 Nationality by 'Heard of Tralee Before Arriving in Ireland' :

This question, by its nature, excluded anyone from Ireland as being a possible respondent. A striking feature of Table 8.9 is the lack of knowledge about Tralee among the Mainland Europeans, particularly the French, where less than 12% had heard of the place before arriving in Ireland. In contrast to this, the prior knowledge among the British (7 in every 8) and indeed those from the U.S. (2 in 3) was quite high.
The average figure of 55.5% answering 'yes' contrasts notably with the 1991 findings\(^8\) where the average for tourists in North Kerry was 87.1%. On the positive side it shows that foreign tourists, having arrived in Ireland, are being directed towards Tralee as a suitable destination, but on the other hand, it highlights that there is a lack of international marketing of Tralee.

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8.7.4 Nationality by 'How heard of Tralee':

<table>
<thead>
<tr>
<th></th>
<th>Travel</th>
<th>Brochure</th>
<th>Friends / Relatives</th>
<th>Rose Festival</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Agent</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Great Britain</td>
<td>4 (8.7%)</td>
<td>7 (15.2%)</td>
<td>13 (28.3%)</td>
<td>22 (47.8%)</td>
<td>0 (0.0%)</td>
</tr>
<tr>
<td>Mainland</td>
<td>21 (30.1%)</td>
<td>32 (47.1%)</td>
<td>3 (4.4%)</td>
<td>3 (4.4%)</td>
<td>9 (13.2%)</td>
</tr>
<tr>
<td>Europe</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>U.S.A.</td>
<td>4 (18.2%)</td>
<td>0 (0.0%)</td>
<td>7 (31.8%)</td>
<td>8 (36.4%)</td>
<td>3 (13.6%)</td>
</tr>
<tr>
<td>Other</td>
<td>1 (16.7%)</td>
<td>1 (16.7%)</td>
<td>2 (33.3%)</td>
<td>1 (16.7%)</td>
<td>1 (16.7%)</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td>21.1%</td>
<td>28.2%</td>
<td>17.6%</td>
<td>23.9%</td>
<td>9.2%</td>
</tr>
</tbody>
</table>

There is no one particular source which provides the initial information about Tralee to the foreign tourists that stands out from the others overall, but each source has a different level of importance in the various countries. The four sources examined in Table 20 are all important catalysts in the visitor's decision-making process.

Almost half of the British visitors become aware of Tralee through the Rose of Tralee Festival. While it also rated highly among the U.S. visitors, it is almost unknown among the Mainland Europeans.

The majority of tourists became aware of Tralee through brochures, and they proved particularly important among the Continentals. However, no U.S. visitor came to hear of Tralee through brochures. Admittedly the sample in this sub-group is relatively
small at 26 respondents and a larger sample would be more conclusive. However, when none of the 26 came to know of Tralee through brochures, then any brochures that are being aimed at the U.S. market are very poor value in terms of return on investment.

A large proportion of the Continentals heard of Tralee through their travel agents. This is very good news and something that should be encouraged. The travel agents proved less influential for other nationalities.

About one sixth of all the visitors heard of Tralee from friends and relatives. It accounts for one third of visitors outside of Mainland Europe.

8.8 Target Markets:

The next step then should be to glean a greater knowledge of Tralee's main target markets. It is important to differentiate the characteristics of the various country markets that are most important to Tralee. Much of the information in this section can be found in Chapter 6 and also in section 8.7, which is just covered, but here the information is presented from a different perspective. From the tourist survey the major country markets would appear to be the domestic market (including Northern Ireland), the British, the U.S. visitors, the Germans and the French.

8.8.1 Irish:

The non-overseas visitors made up 41% of tourists surveyed and so are the biggest market coming into the Tralee area. Over a quarter of them are from Dublin and another quarter are from the rest of Leinster. About one in eight are from the North.

According to Bord Failte statistics\(^8^8\) average spending by domestic and Northern Ireland tourists in 1996 was IR£102 in the Mid-west region. This was slightly above

the national average at IR£98. The average spend of all overseas tourists in the same year was IR£310. Therefore with the Irish accounting for over 40% of all tourists in Tralee in 1997, assuming that the same average spend ratio applied in 1997 as 1996, then the revenue from Irish tourists in the Tralee area is approximately 22% of all tourist revenue (excluding day-trippers).

85% of them were married which means that 35% of all tourists surveyed were married Irish people. These are without doubt the back-bone of the tourism industry in the area. It also helps to explain their age profile which is almost two-thirds 25-44 years - married with young families. Within this age group those from Dublin accounted for half of the 25-34 bracket and one sixth of the 35-44 category. Just 6% of the Irish were aged 18-24.

80% of the Irish were travelling as a family, with another 8% as couples and 7% in groups. Their main reason for visiting Tralee was for holiday or leisure (3 in every 4) and another 21% were day-trippers. Interestingly the proportion of day-trippers was smaller among the Irish than among the overseas visitors.

Figure 8.1

Accommodation Usage of Irish Visitors.
The most popular form of accommodation is shared equally between the Self-catering and the B&Bs. Hotels were not popular and the usage of Hostels by the Irish is minimal.

The Irish are similar to every other nationality visiting the area in that over 90% of them go sight-seeing. Unlike other nationalities however, they are the major users of the Aquadome with 4 in every 5 utilising its facilities. Two thirds of them go shopping and three-quarters of them walk but only 1 in 9 go bowling or fishing and less than 1 in 10 cycle. About 1 in 7 play golf.

Of the Irish, 60% visited the Geraldine, 40% called to the Blennerville Visitor Centre and 30% went on the Steam Train ride. 27% had visited Siamsa Tire.

The singing pubs were popular with 80% of Irish visitors and 60% enjoyed traditional Irish music for entertainment. Just 7% attended cabarets.

8.8.2 British:

There is a vast Irish ethnic population residing in Britain and while it is not reflected in the tourist survey, many of the British tourists are visiting friends and relatives though not in the Tralee area. They account for 33% of overseas visitors to the town. However, they made up 55% of overseas visitors to the state in 1996. A probable cause of the discrepancy is the growth in recent years in the short break market to the east coast to where there is cheap high-speed ferry access.

Average spending in 1996 among the British who visited the state was IR£222 but this is likely to be higher in Tralee since the town has not made significant impact into the short break holidays and the longer the tourist is around the more they are likely to spend.
They account for nearly 20% of all visitors to Tralee, 70% of which are English with the remainder made up almost equally by the Welsh and the Scottish.

Figure 8.2
Accommodation Usage of British Visitors.

The accommodation used by the British is dominated by the B&Bs. This means that 10% of all tourists, excluding day-trippers, are British tourists staying in B&Bs. It is a group that suits B&Bs given their age status. More than a fifth of them were in self-catering establishments.

All of the British tourists were in the 25+ age categories, with half of them aged 25-44 and the other half 45+. This would be along the lines of Bord Failte statistics which highlight that the British market tends to be older and made up of 'empty nesters'. Over 40% of the British travelled as a family and almost 30% were travelling as couples. Another 27% were in groups. Three-quarters of them were around for holiday or leisure reasons and another 22% were day-trippers.
Very few of them did not go sight-seeing and almost 80% went shopping. 70% exercised by walking and a quarter of the British visited the Aquadome. Cycling and fishing was engaged in by 20% while 10% played golf.

Three-quarters of the British saw the Geraldine Experience and over 40% visited the Windmill. 20% travelled by Steam Train.

Siamsa Tire was availed of by a third of the British and almost two-thirds sought traditional Irish music. Slightly less were entertained in singing pubs. They were the nationality most likely to comment that they would like to see more restaurants in the area.

Traditionally the British have been a price sensitive market and if Tralee wishes to target them then it has to offer value for money. With the Good Friday Agreement in place in the North it can be anticipated that the British market will grow at a faster rate than many of the others. In the past British tourists seemed to favour the inclusive package but this is evolving with the global trends and especially those in the higher income brackets prefer an independent holiday - this is the niche that the promotions should be targeting. The appropriate tourism products to cater for this market would be the less vigorous active pursuits such as walks and also mentally active pursuits.

The Conference and Incentive market in Ireland is enjoying high levels of growth at present, especially from Britain. However, the conference organisers are seeking out new ways to operate Ireland. There is a move away from hotels as venues and instead they are being replaced by public buildings or theatres. There is also an interest in locations outside of Dublin and particularly the south west of the country.
The vast majority (8 out of 9) had heard of Tralee before their visit and the main way was through the Rose of Tralee Festival which accounted for over half of them, and another quarter found out about it through friends and relatives.

93% were married with half of them aged 25-44, a third 45-64 and the final sixth 65+.

8.8.3 United States:
The Northern Ireland Peace Agreement will impact significantly in this market. It received saturation coverage in the U.S. with the final hours prior to the agreement being reached on Good Friday getting live television coverage in millions of U.S. homes.

9% of all visitors to Tralee came from the U.S. They accounted for over 15% of overseas visitors which is in line with their 1996 proportion of 16% of overseas visitors to the state. What is required to boost growth in this sector on a national basis is the establishment of more airlines directly linking other parts of the U.S. with Ireland.89 This would heighten the competition and so reduce fares, making Ireland more attractive as a holiday destination.

In 1996 the average spend of North Americans visiting Ireland was IR£434. This includes Canada but over 90% of them were from the U.S.

80% of U.S. tourists in Tralee were married and two-thirds of them were aged 45+. Over 80% were travelling in groups and the remainder in families. As with the British three-quarters were around for holiday or leisure purposes and another 20% were in town for the day.

Almost half of the North American visitors stayed in hotels and close to 30% in B&Bs. None of them used Caravan and Camping or Self-catering accommodation.

All U.S. tourists to the area go sightseeing while 80% shop and 70% walk. About a quarter of them play golf and after that there is little participation in other activities. With the majority of them in the 45+ age categories this is as expected.

Over 80% of them visited the attractions in the Ashe Memorial Hall and 40% were entertained at Siamsa. 30% had Blennerville on their itinerary but they had virtually no interest in either the Steam Train or the Aquadome. The Jeanie Johnston should stimulate much appeal in this particular target market given the fact that North America was the ship's destination when it left port originally.

80% of them seek out traditional Irish music and 70% are entertained in singing pubs.

Over two-thirds of them knew of Tralee prior to their arrival in Ireland and one third first heard of it through the Rose of Tralee Festival, a third through friends and relatives, and one in six through travel agents.
8.8.4 German:

The German market was the second largest tourism generating market in the world in revenue terms in the mid-1990's. It has one of the highest Gross Domestic Products of the developed nations but is presently suffering recession and the after effects of its reunification. Ireland has become more popular with them in recent years because they are favouring destinations that are ecologically friendly.

Similar to the U.S., the Germans accounted for almost 9% of all visitors, and 15% of overseas visitors. This is double the German share of 1996 overseas visitors to the state of 7.2% and helps to highlight the need for marketing information relating to local areas since major variations may exist between national and local statistics.

Bord Failte figures for tourist spending in 1996 show that the Germans had the largest average spending at IR£439. However, the present recessionary period means that they are taking less second and third holidays and the German market has been saturated with cheap offers to medium and long haul sun destinations.

60% of these were single and so the average age was quite young. 32% were aged 18-24 and another 44% were 25-34. This means that over three-quarters of them were under the age of 35. As could be anticipated therefore, over a third of them were students, with C1 (lower middle class) and B (middle class) being the more prominent socio-economic categories thereafter. 44% travelled in groups (mainly students) and almost another quarter of Germans were couples.

It was found that many of the groups were accommodated outside of the Tralee area and so 40% were day-trippers to the town. Of the remainder, who were all in the area for holiday and leisure reasons, B&Bs were their favoured accommodation accounting for over half of them. 20% were caravanning or camping and all forms of accommodation were used with the exception of friends and relatives.
Just 12% of Germans used the Aquadome while 40% cycled and fished in the area. Over 70% indulged in shopping which is quite high given the numbers of students who would not be expected to have any significant disposable income. Half of them walked and they had little or no interest in golf or bowling.

Almost 3 in every 4 visited the Geraldine Experience and a third went out to Blennerville's attractions. 1 in 8 took the Steam Train and Siamsa Tire enjoyed about 20% participation by the Germans.

They did not attend cabarets but well over half availed of singing pubs and traditional Irish music for entertainment.

60% of them had not heard of Tralee before coming to Ireland and 40% first discovered it in brochures.

**8.8.5 French:**
A study has been undertaken on French holiday trends and their future development\(^9\). It has been forecast that by the year 2010 90% of the French population will take holidays while just 60% do so at the present, and medium length breaks will outperform the short ones. There will be a need for customised packages for niche markets.

Average spending among the French nationally in 1996 was IR£336, over IR£100 less than the average for the Germans.

In the survey it was found that 6% of tourists in Tralee were French. Two in every three were single and so, like the Germans, the average age was much lower than for

any of the English speaking countries. In fact half of the French respondents were in the 18-24 age bracket. Almost two-thirds of them were travelling with a friend or in a group. Nearly half of them were students and the next largest socio-economic category was C2 (skilled working class). B&Bs were the favoured form of accommodation followed by Caravan and Camping. According to Bord Failte these holidays tend not to be pre-booked. Like the Germans almost half of them were day-trippers to the town.

All but one of the French went sight-seeing and three-quarters of them went walking. A third cycled and 10% went fishing. Over half of them shopped and a third of them visited the Aquadome.

55% visited the Geraldine Experience and 40% the Blennerville Windmill Centre. Over 40% called to Siamsa and 10% took the Steam Train.

A third of the French availed of or intended availing of traditional Irish music as entertainment and over 40% savoured the singing pubs.

8 out of every 9 of them had not heard of Tralee before arriving in Ireland. This helps to explains how brochures were their most frequent source of information on the area, closely followed by travel agents. There is a discrepancy here (1 in 9 heard of Tralee before coming to Ireland but 1 in 3 first heard of Tralee from travel agents?) so it is assumed that when they answered 'travel agent' they were referring to a travel information source within Ireland.
8.9 Market Segmentation:

Market segmentation is necessary for a number of reasons. There is no point in spending money on a general advertising campaign when the customers are not interested in being treated as "general" customers but rather want a tourism product which is tailored to their needs and wants. For instance, there is a clear contrast between conference tourism and youth tourism, just as there is between senior citizens and singles groups.

Special interest holidays, both passive and active, offer significant potential for product development in Tralee and should be upgraded and promoted. When the necessary product investment has occurred it is an area of the market that warrants a much larger slice of the marketing spend than its present market share because it is segment that more customers will want and one which has seasonality benefits - the tourist indulging in special interest activities is more likely to travel in the off-peak periods. Also, since Tralee's main overseas markets are mature ones, the emphasis needs to switch from main holidays to additional breaks.

In terms of market penetration there are four alternatives open to the marketing personnel as follows:

- The existing quality tourism products can be targeted at Tralee's present markets;
- The present products can be developed into new markets where there is scope for achieving sufficient demand for them;
- New tourism products can be researched and developed to provide better quality and choice to the existing markets; or
- The new tourism products can be developed with the intention of creating new customers in new markets.

It has to be kept in mind that as one moves down the scale from the first choice to the fourth, the degree of risk involved increases but so does the potential return.
The segments being developed also have to account for factors such as extending the season, access transport and the maximising of revenue yield. Regarding the latter point the key target should be the ABC socio-economic grouping\textsuperscript{91} in the 45+ age categories - they are the most affluent, and with their families grown up (where relevant) have the most time for holidaying. Women are also becoming more dominant in the Conference and Business segment and in the Singles Market and so offer another avenue for development.

8.10 Promotion Mix:
When the marketing managers in Tralee have gathered the required information relating to their target markets and have decided on the market segments that will prove most profitable to the town in the long-term, they can then devise the most appropriate promotion mix to optimise the effect of whatever funding is available to them.

The promotion mix can involve advertising through media such as television, radio and press. It may include advertising space on billboards but these should be confined to areas like Dublin. The aim should be to have the maximum audience impact with the minimum cost. Brochures already play a big part in Tralee's advertising and have proven successful. The important point in their use is to ensure that they are aimed at new markets or segments as opposed to being used too locally and only having a displacement effect.

Trade and Consumer Promotions can be very effective if professionally carried out. The tourist suppliers such as the tour operators are lured into the area more easily if there is evidence of a professional service being offered which will have the effect of minimising their problems.

\textsuperscript{91}For brief description of socio-economic class see Table 5.16, Page 103.
The form of personal selling that offers the most potential is the warm hospitality that should envelope each and every tourist in the area. This is the intangible that the visitors enjoy and appreciate and leads to good word-of-mouth promotion.

The Rose of Tralee Festival has over the years been an excellent source of good Public Relations and it has not received the merit it deserves. It is the primary festival in the Mid-west region. Other destinations would pay handsomely for the good-will that is attached to those few words, the 'Rose of Tralee' and there is an onus on promoters to capitalise on it to a much higher degree. Tralee needs a brand name that will enable tourists to identify the area more readily and associate it with the benefits offered. This in turn would create more customers, building extra value into the destination due to differentiation.

8.11 Effective Marketing - Accommodation Survey:
When the accommodation providers were asked in their survey what the town needed to better target its markets 50% of them suggested more advertising. They also put forward a number of ways in which this could be achieved. One was to place brochures in foreign tourist offices. Another was to place them in cars that are being hired out. One respondent expressed that it was time to produce an up-dated video for foreign marketing. It was mooted that the Government ought to provide Bord Failte with more funding for international advertising.

It was proposed that there was insufficient market research for effective promotion. Some suggested that promotion be done at the micro-level by writing to previous guests, the use of business cards and offering special weekend breaks.
8.12 Conclusions and Recommendations:

There is the belief that one stage of the town's development has been successfully completed, but now there is a need to get an overview again and through this process, identify the next stage and build a plan around it. When this is being done there are many variables which have to form part of the final proposals and without which the progression path will be negatively skewed and therefore less sustainable. The final part of the study looks at a number of these variables and other location-specific aspects that have come to light.

8.12.1 Special Interest Activities:

With the advent of advanced technology and a greater proportion of sedentary occupations there is more emphasis on improved health and enhanced lifestyle. Therefore special interest activities have experienced a much heightened demand but this is not being sufficiently catered for in Tralee. There are many activities and proposals that need attention and problems to be addressed.

- Angling enthusiasts to the county experienced a lack of hospitality from the angling clubs in the county.\(^2\) This can have a damming effect on the area's tourism industry, which is proving fundamental to economic growth, and so appropriate measures need to be exercised.
- Specialist walking facilities should be introduced to the area including way-marking and maps.
- Cycling routes could be developed outside of the town itself where there would be restrictions on other traffic, e.g., no coaches at certain times, and the presence of cyclists highlighted through sign-posting.
- There is a need for linkages to be created between the different activities and attractions in the area to achieve value-added. For instance, transport systems

which service a number of activities or the availability of guides for educational enrichment during walks.

- Members of communities in out-lying areas should be informed and educated in the provision of special interest activities to small groups. This would help in the distribution of tourists in groups that would not have significant impact on the environment. These tourists could be accommodated in the town and use its facilities in the evenings.

- It would also present an opportunity for formulating a more balanced tourist product portfolio that the town needs. Due to the dependence on tourist attractions at present there is the inclination to view the visitors as "numbers" rather than interactive dynamic beings who are opting to ignore "more of the same" and are willing to eke out that which is different. The biggest challenge facing the tourism industry in Tralee is to formulate and develop the products that will fulfil these needs. This also provides an opportunity to create unique products that are beneficial in forging competitive advantage.

- Marketing support is easier to muster for high quality new developments, especially in western areas of the country and in the area of special interest activities there really are no boundaries to innovation.

8.12.2 Senior Citizens:

There are more people now in retirement due to greater demand for early retirement and increasing longevity. As a result the over 45's are becoming more dominant in international travel and particularly the over 55's. These people have more time to spend travelling and form a segment of the tourism market that is ever-growing in significance. Tourism products in the area should be developed which are geared specifically towards this market niche. Special interest products could be developed which are mildly physically active such as walking routes and mentally active pursuits including arts, heritage, and culture. It is important to identify market segments such as this one with a higher propensity to travel.
8.12.3 Seasonality:

One of the main challenges facing the town is dealing with the problems caused by seasonality. These include seasonal jobs, small profits, idle capacity and lack of investment due to quiet periods and congestion, inadequate infrastructure, environmental damage and bad publicity as a result of busy times. At present business is very peaked, and there is the inherent danger that the whole character of the town will be jeopardised if business cannot be pushed out into the shoulder months.

The tourism trade in the town needs to make a contribution to change the present situation. The conference business is already being targeted but environmentally friendly tourists, Europe's ageing population and special interest holiday-makers are all prepared to travel in the out of peak season also.

Social Welfare also has a role to play since some tourism businesses lay off workers for the two months when business is very slack. These workers then claim social welfare benefits. If they take little holidays during the rest of the year the workers are paid their holiday pay also on finishing in a lump sum. They then begin to claim their entitlements immediately so that they may in fact be earning more during their lay-off than while working due to the "double payments". This encourages the perpetuation of a lack of professionalism in the industry.

The Government should offer incentives to promote marketing efforts aimed at the off-peak periods. If local effort is slow to realise the benefits and does not choose that route then the possibility of the introduction of a tourism tax on businesses is greatly enhanced.
8.12.4 Create "Honey pots":

The more links there are between accommodation, attractions and other facets of the tourists' experience, the more saleable the tourism product is. This could involve all-in-one deals or offering discounts for one product as a consequence of using another. For the tourist it has the effect of making the products less expensive and the gain for the businesses is that they would achieve higher usage rates.

8.12.5 Market Research:

This piece of research can be useful in helping to identify target markets and market segments which discriminate in favour of quality and therefore have above average profitability yields. However, the information would be more insightful if it was developing trends. This can only occur when the same survey is repeated in similar circumstances so that the results are comparable and the trends become apparent. This is an area where the local Institute of Technology, Tralee, could play a role. It is appropriately located in the town and would be in a position to hold a database so that reports in specific areas of interest to the tourism trade could be compiled if requested.

8.12.6 Partnership - Local Authority and Community:

The local authority is the appropriate medium through which partnership should be developed. It is in a position to engage in local area planning, in which the community is involved at an early stage in the drafting of proposals for the larger area development plan and in the improvement of the local amenities. As an example one only has to look at the development of the HARP (Historical Area Rejuvenation Project) plan in Dublin's inner city where the local community has been given a genuine role in the management of the area's development.

The local authority sometimes offers investment incentives and since it is essentially the community at large that is funding these incentives, then there should be a community say in what projects receive investment and stipulations regarding their
implementation. In this way the community will take ownership of how the town develops and it will not be something that is forced upon them. With ownership comes a pride of place and a "feel-good" factor that is apparent to the tourists.

Admittedly this requires a change in the whole ethos of local government but this is a change that is gradually coming about. Local government has traditionally manifest itself as the state in conflict with its citizens as opposed to being an arena in which people could relate their local concerns to the democratic process. The evidence of voter interest (voting rates as low as 31% in the 1996 Local government elections)⁹³ is an indictment of the system and so the time is right for change.

8.12.7 Partnership - Tourism Interests and Community:

The tourism businesses in the town would prefer to ignore the fact much of the time that they are dependent on the community for their survival. There is a need for a greater awareness of the integral role of the local community in the overall tourism service. The community supplies the labour for many businesses, the "friendly faces" for the tourist and the sense of balance without which in a short time there would be no tourist. No tourist comes just to check out the standard of the accommodation - they come for an experience and the local community is usually an essential element in this. The recommendation is not that the tourism businesses should take on board the interests of the community but rather that they have no choice but to do so since the businesses are totally reliant on the community for their long-term well-being.

As already stated there is a need for innovation in terms of new tourism products. The community at large provides the greatest capacity for mainstreaming innovation. Generation of new ideas improves the commercial vitality of the area. The local

people have a wealth of experience and perspectives that are the cornerstone of innovation and therefore the hub around which future tourism should develop.

Street theatre and special evenings is an area where the tourism businesses and the local community can act in tandem for the betterment of all concerned. A void has been highlighted by the tourism trade in relation to late night shopping. If the tourism interests were willing to fund the equipment and other physical elements of the street theatre it is anticipated that the community would recognise it as an opportunity for self-expression and personal development. It would be particularly suitable during the summer months and would also lend to the holistic approach that is the basis of sustainable development.

8.12.8 Sustainability:

Sustainability has become a priority for the Government in recent years in the development of tourism policy. However, its understanding is often limited to the physical environment and overlooks the people that live in it, and especially those who are marginalised. To compound this those formulating local development strategies tend to view sustainability as a hindrance to their plans. This in itself is unsustainable.

The destination management organisation which in Tralee's case is the Task Force has a leading role to play in developing an agenda for including the whole community in their endeavours and ensuring that the perceived benefits from tourism substantially outweigh the total costs which are part of it. First it should develop the appropriate tourism vision for the community in the town. This needs to specify the community's goals in relation to tourism. Then there should be a process through which consensus is reached dealing with the social, physical and cultural carrying capacity of the town. Actions are then specified to develop the local tourism industry while respecting the

carrying capacities that have been agreed. The other steps needed are for evaluation and feed-back. Agreed measures are utilised to monitor the impact of tourism in the area and the results are communicated to all concerned.

These will never be more than aspirations unless actions are also agreed which can be triggered, depending on the evaluation findings. These could include a cap on numbers of tourists, a tax to support the development and maintenance of the tourism infrastructure and preservation of unique resources (and not just physical ones!). Agreement between the tourism industry and the community should be negotiated with respect to architectural development standards, signage and market segments targeted. It cannot be emphasised enough that these steps are all in the best interest of the tourism industry since it has the potential to be a powerful catalyst in the betterment of the whole area but likewise it can be just as effectual in the deterioration of the quality of life in the town and so lead to its own down-fall.

Public relations programmes to improve tourism's image in the local community would increase the support for tourism.\(^5\) Often the locals do not appreciate tourism because they are not aware of its benefits to the community that would not be available to them without tourism, e.g., the Aquadome. Identification of the groups to be targeted, especially those who are not economically reliant on tourism, aids in the assessment of their information needs and the formation of public participation programmes to help in the sensitive and effective development of tourism.

While tourists are first induced into the area as guests, they are also co-responsible for maintaining the destination. Therefore they should be persuaded to show consideration towards the social, cultural and natural environment and to select tourism products which do likewise.

Hotels in Tralee should be encouraged towards and actively supported in the establishment of environmental good practice programmes. The necessary information can be obtained from other hotels that have already chosen to go down this road. The programme could involve waste management and reduction, reuse, recycling, conservation of energy and water, lighting, heating and quality of air and water.

8.12.9 Quality:

Programmes that encourage staff development such as the Tralee Chamber of Commerce's 'Customer Care' programme are to be commended and encouraged in the drive for high quality service. Many aspects of the tourism product are difficult to improve but the quality of the delivery of the service has much potential and is a key component in competitive advantage. The striving for improvements in quality should be a proactive venture with the aim of exceeding the customer's expectations as opposed to being reactive, e.g., in case of complaints. The Irish are renowned for their friendly and welcoming disposition towards tourists, which is a major advantage. However, tourism managers in areas such as Tralee which do not possess a tradition of tourism need to bear in mind the continuing sensitivity of their employees towards servility due to this country's colonial past. When this is compounded by relatively low incomes, poor career prospects and unstable employment, it is easier to understand that there are many barriers to raising quality standards in service.

The tourism organisations in Tralee need to focus on quality in a general way and also in specific areas. The general ways include evaluative research based on elements of quality such as responsiveness, reliability, and empathy. Specific changes which would impact positively on the quality of the tourism product in Tralee include more restaurants to offer the tourist a broader choice in cuisine, making Tralee more attractive through pedestrianisation, tree planting, the introduction of traffic-calming measures and creation of people-oriented areas. There is much heterogeneity in the provision of tourism services to achieve better differentiation but there is a need for
consistent standards, particularly in terms of hygiene. Improvement in quality is the only option in the effort to increase yield and profitability. With it there can be greater focus on loyalty and repeat visits.

8.12.10 Human Resources:
C.E.R.T. is at present playing a pivotal role in the future of the Irish tourism industry. The rapid growth in the industry has to be matched with a similar growth in the availability of suitably qualified personnel. In recent years there has been a labour shortage in some sectors such as hotel staffing and the cause of this needs urgent attention. There should be a transparent career progression for people entering the industry and improved working conditions. These progressions need to be communicated so that there is a positive image of a career in tourism being put across to the potential work-force and especially to those who are still in the school system.

In the last decade there has been an increased emphasis on foreign languages within C.E.R.T.'s training programmes which is a fundamental component in the achievement of a quality tourism product. However, there needs to be a greater awareness of its benefits in the provision of a memorable tourist experience for continental European visitors in particular. Having staff who can speak a foreign language is not to be viewed as a "bonus" but rather their absence is a reflection on a sub-standard product.

8.12.11 Tourism Promotion of Tralee:
A branding approach would be of great benefit to the town due to the necessity to avoid duplication and the projection of non-conflicting marketing images of Tralee. The current marketing investment needs to be examined and the possible economies of scale of joint marketing should be highlighted. The most appropriate choice of image is the 'Rose' of Tralee, because of the song and the festival which facilitate instant recognition for many potential tourists. The Rose of Tralee Festival itself may need to be rejuvenated if it is to remain a major international festival since if it is allowed to
decline, then one of Tralee's biggest assets could become a liability. The Festival Committee have an office in the Ashe Memorial Hall but it is quite discrete and so the image of the Rose of Tralee remains very low-key.

In targeting tourists it is important that the trade has a heightened awareness of Tralee and what it has to offer. As mentioned in the opening chapter the travel agents are assuming the mantle of expert adviser as opposed to reservations agent and so it is imperative that every effort is made to keep them abreast of Tralee's developing tourism product. The promotion of the local beaches and walks would be prudent in European markets where there has been a significant shift in attitudes towards environmentally-friendly practices and a healthy clean environment is rated highly as part of their holidays.

Linkages with Killarney need to be fostered. Prior to recent years the tourism industry in Tralee was afraid that it would be over-shadowed by the towering tradition of tourism in which its neighbouring town is steeped. Whether or not such a partnership would have proved beneficial to Tralee in the past is debatable but currently Tralee can only lose out without these linkages. It has much to offer that Killarney does not and vice versa. If each destination was to offer its wares in conjunction with the other they would collectively have a much more rounded tourism product.

Some group should be given responsibility as an umbrella group for the implementation of many of the general measures mentioned and it should have a shop-front on the pedestrian area so that it is evident to all what is being done, locals and tourists alike. This would enhance the effectiveness of the overall drive as a marketing tool, as well as providing an easily accessible interface for all concerned with the tourism development of the town.
8.12.12 Siamsa Tire:

It needs to consider an expansion of its premises so that it can cater for at least double its present numbers. This may need to be done through the building of another theatre which is linked to the present one, for instance the concept of a twin fort, with an underground passage connecting the two, as is found in the Irish country-side.

The design of any future extension should be delegated to innovative architectural design firms in the form of a competition, possibly three Irish and three international, each being given an initial remuneration and the winner getting to see the job through to fruition. Each would be given a brief of all the facets of the project to be taken into account. These would include the external aspects like traffic management, parking, residential interests, sky-scape, linkages to other visitor facilities and cultural conformity, and internal ones such as intimate interactive atmosphere and sense of heritage which are so evident and commendable in the current theatre.

If Siamsa was capable of handling larger numbers it could also gain business in the conference and incentive sector in the off season. There is a trend emerging which exhibits a move away from hotel conferencing towards locations such as theatres and the Siamsa facilities could well prove very suitable in filling this niche in conjunction with the local hotels.

North Kerry has a strong tradition in literature and particularly drama. A local amateur drama group can be more effective in the presentation of a John B. Keane play than a professional troupe in Dublin. This may be because there is less acting involved due to the fact that the actors do not need to internalise the situation - in a cultural sense it is "where they are coming from". The second auditorium could also be used to develop this aspect of what the locality has to offer to the visitor. It would also have the effect of involving the local community in the evolution of tourism and in a developmental way for themselves.
8.12.12.1 Traditional Irish Culture:

No matter what the cause of the upsurge in interest in traditional Irish music, be it Riverdance or whatever, it is an entertainment which due to its growing popularity has to be made more readily available to the visitors. Currently there is a dearth in the accessibility of the town's local culture to the visitors. There is a niche in the market for a traditional Irish music and dance product that has components of what Siamsa offers and what pubs offer. This could be a venue for Ceili's which is more culturally steeped than pubs or hotels and more participatory than Siamsa, where the visitors to the town get to participate in polkas, Siege of Ennis, and other dances which can be geared towards different levels of expertise. The allurement of this type of activity to the visitor include discovery, atmosphere, ambience, perceived authenticity emotion and education. Through this identification of what the tourist wants it should be possible to put in place the optimum blend of different aspects of the culture that they seek and which is available. Other attributes could include 'sean-nos' (traditional Irish singing), the Irish language and special events.

8.12.13 More Traffic through Kerry Airport:

Declining numbers of overseas visitors are bringing their own cars and almost four in every five tourists from overseas are travelling by air. The more passengers that pass through Kerry Airport, the easier it becomes for the Airport Authority to attract other airlines and establish new routes. Therefore it is in Tralee's own interest to promote the use of the airport by visitors and locals alike. It may be possible for some of the hotels in the area to put together customised packages that include the use of the airport, especially in the short breaks segment. Currently it provides daily flights through RyanAir, which is one of the few "no-frills" airlines based in Europe, in an effort to minimise travel prices. However, the airport needs to attain a position where it is making a profit without the inclusion of duty free shopping which is presently in jeopardy. If this it not achieved it could have ominous consequences for the airport and as a result for the tourism industry in Tralee.
8.12.14 Seating at Bus Station:
The percentage of the respondents passing through the bus station would have been low, but the lack of seating left a lasting impression on those affected. The provision of seating is an element of infrastructure that would have a positive influence on the traveller's experience, especially in relation to its cost.

8.12.15 Cycle Paths:
The traffic congestion in Tralee, which is particularly exacerbated in the peak-season, reiterates the need for the integration of cycle paths in the town since all major cities have realised their value and have initiated plans for their actuality. The many advantages of cycling include lower levels of pollution, less traffic congestion and improved health.

8.13 Prospects:
On the whole there is an air of conviction among tourism interests in Tralee that they will shape their own future. They have a realisation that the best way to move forward is by providing what the tourist wants and will want. This marketing concept will stand them in good stead and will give them the all-important edge on other similar destinations.

"I'm looking forward to a bright future."

Accommodation Provider.
Appendix A

Guest house and Hostel Questionnaire for Tourism Survey, Tralee 1997

All information given on this questionnaire will be treated in the strictest confidence. It will be held in Tralee Regional Technical College.

1. What type of service do you provide?

2. How long is your business in existence?
   - 0-2 years
   - 6-10 years
   - 3-5 years
   - More than 10 years

3(i). Are you satisfied with the level of service provided by banks and other financial institutions?
   - Yes
   - No
   If no, please state why ________________________________

3(ii). Do you presently conduct your business with your original bank or other financial institution?
   - Yes
   - No
   If no, please state why ________________________________

3(iii). How can the banks and other financial institutions improve the level of services to your business?

______________________________
______________________________
4(i). Please rate the following local authority services:

<table>
<thead>
<tr>
<th>Service</th>
<th>Excellent</th>
<th>V. Good</th>
<th>Fair/Not Sure</th>
<th>Poor</th>
<th>V. Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refuse Collection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water Supply</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sewage Facilities</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parking Facilities</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fire Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parks/Amenities</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Other - please state

If you are dissatisfied with any of the above services, please state why:

5. Is crime proving to be a problem for your business?
   Yes □ No □
   If yes, please state why:

6. Has increased environmental awareness increased your costs?
   Yes □ No □
   If yes, please state why:

7. What form of business do you operate?
   (1) Sole Trader □
   (2) Partnership □
   (3) Private Limited Company □
   (4) Family Business □
   (5) If other, please state: ____________________________
8(i). Please state the number of your employees who are full-time/part-time:

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Time</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Part Time All year Round</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Part Time Seasonal</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

8(ii). How many of your employees are under 25 years of age?

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Time</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Part Time</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

8(iii). Have the numbers employed increased or decreased in the last 3 years?

<table>
<thead>
<tr>
<th>Increase</th>
<th>Male</th>
<th>Female</th>
<th>Decrease</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of 1 to 5</td>
<td>□</td>
<td>□</td>
<td>Decrease of 1 to 5</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Increase of 6 to 10</td>
<td>□</td>
<td>□</td>
<td>Decrease of 6 to 10</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Increase of 11 to 20</td>
<td>□</td>
<td>□</td>
<td>Decrease of 11 to 20</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Increase of 21 to 50</td>
<td>□</td>
<td>□</td>
<td>Decrease of 21 to 50</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Increase over 50</td>
<td>□</td>
<td>□</td>
<td>Decrease over 50</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>No Change</td>
<td>□</td>
<td>□</td>
<td></td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

9. What are your methods for recruiting staff?

(1) Newspaper Advertisement □
(2) From C.V.'s received □
(3) Recruitment Agencies □
(4) F.A.S. □
(5) Personal Contacts □
(6) School/Colleges Career Services □
(7) Other Methods (specify) □

10. In which of the following languages are your employees fluent?

<table>
<thead>
<tr>
<th>Languages</th>
<th>Numbers Fluent</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) French</td>
<td>□</td>
</tr>
<tr>
<td>(2) German</td>
<td>□</td>
</tr>
<tr>
<td>(3) Spanish</td>
<td>□</td>
</tr>
<tr>
<td>(4) Italian</td>
<td>□</td>
</tr>
<tr>
<td>(5) Japanese</td>
<td>□</td>
</tr>
<tr>
<td>(6) Other</td>
<td>□</td>
</tr>
<tr>
<td>(7) None</td>
<td>□</td>
</tr>
</tbody>
</table>

A-3
11(i). Are you eligible for grants?

Yes □ No □ Don't Know □

If yes, please specify grant type

If no, will you fund your own training?

Yes □ No □

11(ii). Has C.E.R.T. assisted you in any way?

Yes □ No □

If yes, please specify the type of assistance:

12. Do you consider that C.E.R.T. and the Tralee R.T.C. provide services to meet local needs?

Yes □ No □

If no, please give your opinion as to the services C.E.R.T. and/or the Tralee R.T.C. should provide:

13. Do you think the labour force is adequately trained?

Yes □ No □

If no, what is needed?

14(i). What do you think are the barriers to expansion?

Lack of ability to invest □
Lack of practical skills □
Difficulty in sourcing funds □
Lack of resources locally □
Other - Please State

14(ii). What do you think would help expansion?


15. How many guest beds are in your house?  
   Single □  Double □

16. Are you open for business all year round?  
   Yes □  No □
   If no, for how many months are you open? _____ months.

17(i). On average what percentage of bed occupancy do you experience when you are open?

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Jan-April</th>
<th>May-Aug</th>
<th>Sept-Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;10%</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>11-30%</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>31-50%</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>51-80%</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>&gt;80%</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

17(ii). What percentage of your business is Commercial/Private?  
   Commercial □  Private □

18. Have you made any renovations/expansions to your property in the last three years?  
   Yes □  No □
   If yes, please state the nature of your expansion/renovation?

19(i). Are you a member of Bord Failte?  
   Yes □  No □
   If yes, how can Bord Failte improve the level of service to your guesthouse?

19(ii). Are you a member of another tourist organisation?  
   Yes □  No □
   If yes, please state the name of the organisation?
   If yes, how can it improve the level of service to your guesthouse?
20. Please state the nationality of your guests as a percentage of the total number of guests.

<table>
<thead>
<tr>
<th>NATIONALITY</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Irish</td>
<td></td>
</tr>
<tr>
<td>English</td>
<td></td>
</tr>
<tr>
<td>French</td>
<td></td>
</tr>
<tr>
<td>German</td>
<td></td>
</tr>
<tr>
<td>American</td>
<td></td>
</tr>
<tr>
<td>Other(s)</td>
<td></td>
</tr>
</tbody>
</table>

21. Why do your guests come to the Tralee area?

____________________________________________________________________________________________________

22. How can these tourists be better targeted from a marketing point of view?

____________________________________________________________________________________________________

23. Do you accommodate package tours?
   Yes □ No □
   If yes, what percentage of your business do they account for? □%

24. Do you think North Kerry and South Kerry should be marketed as one tourist location as opposed to currently being marketed by Shannon Development and Cork/Kerry tourism respectively?
   Yes □ No □
   If possible, give a reason for your answer.
   __________________________________________________________________________________

25. In your opinion, what would enhance business in the area?

____________________________________________________________________________________________________

Thank you for your co-operation.
Appendix B

Hotel Questionnaire for Tourism Survey, Tralee 1997

All information given on this questionnaire will be treated in the strictest confidence. It will be held in Tralee Regional Technical College.

1. How long is your business in existence?
   - 0-10 years □
   - 11-50 years □
   - More than 50 years □

2. Are you open to the public all year?
   - Yes □
   - No □

   If no, for how many months is it closed? □

3(i). Are you satisfied with the level of service provided by banks and other financial institutions?
   - Yes □
   - No □

   If no, please state why ___________________________

3(ii). Do you presently conduct your business with your original bank or other financial institution?
   - Yes □
   - No □

   If no, please state why ___________________________

3(iii). How can the banks and other financial institutions improve the level of services to your business?
   ___________________________
   ___________________________

B-1
4(i). Are you satisfied with the services being offered by insurance companies?

- Yes □
- No □

If no, please state why ________________________________________

4(ii). Do you experience a high number of employee claims?

- Yes □
- No □

4(iii). Do you experience a high number of public claims?

- Yes □
- No □

5. Please state whether you think the following methods of transport in the area are adequate or inadequate:

<table>
<thead>
<tr>
<th>Method</th>
<th>Adequate</th>
<th>Inadequate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rail Services</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Roads</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Sea</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Air</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

Where have you expressed any of the above methods to be inadequate, please state why:

____________________________________

6. Do you use Market Research?

- Yes □
- No □

If yes, what methods of Market Research do you use?

- Government Information and Statistics □
- Government Research Agency □
- Market Research Agency □
- Own Records □
- Own Marketing Survey □
- Own Observations □
- Others: Please Specify

B-2
7. Please rate the following local authority services:

<table>
<thead>
<tr>
<th>Service</th>
<th>Excellent</th>
<th>V.Good</th>
<th>Fair/Not Sure</th>
<th>Poor</th>
<th>V.Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refuse Collection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water Supply</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Sewage Facilities</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Parking Facilities</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Fire Services</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Parks/Amenities</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Other - please state</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

If you are dissatisfied with any of the above services, please state why: ________________________________

8. How do you view the current situation with regard to rates?

   Satisfied □  Dissatisfied □

If dissatisfied, please state why and include any changes that you think would rectify the situation:

________________________________________________________________________
________________________________________________________________________

9. Is crime proving to be a problem for your business?

   Yes □  No □

If yes, please state why:

________________________________________________________________________
________________________________________________________________________
10. Has increased environmental awareness increased your costs?

Yes □  No □

If yes, please state why:

________________________________________________________________________

________________________________________________________________________

11. What form of business do you operate?

(1) Sole Trader □

(2) Partnership □

(3) Private Limited Company □

(4) Public Limited Company □

(5) Branch of Irish Company □

(6) Subsidiary of Foreign Company □

(7) State Owned □

(8) Co-operative □

(9) If other, please state ____________________________

12(i). Please state the number of your employees

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permanent</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Seasonal</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Casual</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

12(ii). How many of your employees are under 25 years of age?

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permanent</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Seasonal</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Casual</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>
12(iii). Have the numbers employed increased or decreased in the last 3 years?

- [ ] Increase of 1 to 5
- [ ] Decrease of 1 to 5
- [ ] No Change

- [ ] 6 to 10
- [ ] 6 to 10
- [ ] 6 to 10

- [ ] 11 to 20
- [ ] 11 to 20
- [ ] 11 to 20

- [ ] 21 to 50
- [ ] 21 to 50
- [ ] 21 to 50

- [ ] more than 50
- [ ] more than 50
- [ ] more than 50

12(iv). What percentage of your staff are union members? [ ]

12(v). What is the length of the working week for permanent staff? [ ] hours.

13. What are your methods for recruiting staff?

1. Newspaper Advertisement [ ]
2. From C.V.'s received [ ]
3. Recruitment Agencies [ ]
4. F.A.S. [ ]
5. Personal Contacts [ ]
6. School/Colleges Career Services [ ]
7. Other Methods (specify) [ ]

14. Please specify the cost of training in your organisation over this year?

Cost

Managerial [ ]

Administrative [ ]

Skills [ ]

B-5
15. Do you have "In-House"/On-the Job Training

Yes  □  No  □

If yes, who provides it? (Tick all appropriate boxes)

(1) Own Personnel  □  (2) Consultants  □
(3) C.E.R.T.  □  (4) Professional Bodies  □
(5) F. A. S  □  (6) Other: Please specify

16. Which of the following languages are your employees fluent in?

<table>
<thead>
<tr>
<th>Languages</th>
<th>Numbers Fluent</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) French</td>
<td>□</td>
</tr>
<tr>
<td>(2) German</td>
<td>□</td>
</tr>
<tr>
<td>(3) Spanish</td>
<td>□</td>
</tr>
<tr>
<td>(4) Italian</td>
<td>□</td>
</tr>
<tr>
<td>(5) Japanese</td>
<td>□</td>
</tr>
<tr>
<td>(6) Other</td>
<td>□</td>
</tr>
<tr>
<td>(7) None</td>
<td>□</td>
</tr>
</tbody>
</table>

17. What incentives are offered to your employees to take part in training courses?

(1) Full Financial Support  □
(2) Part Financial Support  □
(3) Study Leave  □
(4) None  □
(5) Other - Please Specify

18. Are you Eligible for training Grants?

Yes  □  No  □  Don't Know  □

If no, will you fund your own training?

Yes  □  No  □
19. Has C.E.R.T. assisted you in any way?
   Yes □  No □
   If yes, please specify the type of assistance:

20. Has F.A.S assisted you in any way?
   Yes □  No □
   If yes, please specify the type of assistance:

21. Do you take part in C.E.R.T. work placement schemes?
   Yes □  No □
   If yes, how many employees does this involve at present? □
   Please specify their type of work:

22. Are you involved in any other work experience schemes?
   Yes □  No □
   If yes, please specify this type of work:

23. Do you consider that C.E.R.T. is able to provide the hotels with enough trained staff?
   Yes □  No □
   If no, please give your opinion as to how this may be achieved:

24(i). Have you made any renovation/expansion to your property over the last 3 years?
   Yes □  No □
24(ii). If yes, please state the nature of the renovation/expansion?
24(iii). Within the next 2 years, do you have plans to renovate/expand/diversify?

Yes □          No □

If yes, please state the nature of the renovation/expansion/diversification:

25. Do you think the labour force is adequately trained?

Yes □          No □

If no, what is needed:

26(i). What do you think are the barriers to expansion?

- Volatile market □
- Lack of state spending on marketing □
- Lack of ability to invest □
- Lack of practical skills □
- Difficulty in sourcing funds □
- Limited profit margin □
- Other - Please State ____________________________________________

26(ii). What do you think would help expansion? (please state).

---------------------------------------------------------------------------------

27(i). Did you obtain support from SFADCO/Forbairt?

Yes □          No □

If yes, please specify:

---------------------------------------------------------------------------------
27(ii). Had you any difficulty at any stage of your application?

Yes □ No □

If yes, please specify:


28(i). Are you a member of Bórd Fáilte?

Yes □ No □

28(ii). Are you a member of any other tourist organisation?

Yes □ No □

If yes, please state the name(s) of the organisation(s):


28(iii). How can Bórd Fáilte improve the level of service to your hotel?


29. Please state the total number of sleepers in your hotel?


30. Does your hotel provide leisure facilities?

Yes □ No □

If yes, please state the type of facilities provided:


31. Does your hotel provide entertainment for its customers?

Yes □ No □

If yes, please state the type of entertainment provided


B-9
32. Does your hotel have facilities to cater for the following and please state the yearly numbers where available?

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
<th>NUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Weddings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conferences</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parties/Functions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

33. Do you accommodate package tours?

Yes ☐  No ☐

If yes, what percentage of your business? ☐%

34. What grade is your hotel? ____________

35. What percentage of gross profit is made on:

% 

Food? ☐ 

Beverages? ☐

36(i) What percentage of revenue is allocated to wages? ☐%

36(ii) What percentage of revenue is allocated to the following?

Leisure facilities ☐% 

Energy expenses ☐% 

Telephone expenses ☐%

36(iii) What percentage of your energy costs are attributable to the following?

Oil ☐% 

Gas ☐% 

Electricity ☐%
37. Please rate the difficulty posed in fulfilling the criteria laid down by the following government departments/agencies:

<table>
<thead>
<tr>
<th>Department</th>
<th>V.Difficult</th>
<th>Difficult</th>
<th>Manageable</th>
<th>Easy</th>
<th>V.Easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Welfare</td>
<td></td>
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<tr>
<td>Health</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finance/Revenue</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bórd Fáilte</td>
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</tbody>
</table>

If difficult or very difficult, please give reasons:

________________________________________________________________________

________________________________________________________________________

38. Please state the nationality of your guests as a Percentage of the total number of guests.

<table>
<thead>
<tr>
<th>NATIONALITY</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Irish</td>
<td></td>
</tr>
<tr>
<td>British</td>
<td></td>
</tr>
<tr>
<td>French</td>
<td></td>
</tr>
<tr>
<td>German</td>
<td></td>
</tr>
<tr>
<td>American</td>
<td></td>
</tr>
<tr>
<td>Other(s)</td>
<td></td>
</tr>
</tbody>
</table>

39. In your opinion, what are the main reasons why your guests come to the Tralee area?

________________________________________________________________________

________________________________________________________________________

40. How can these tourists be better targeted from a marketing point of view?

________________________________________________________________________

________________________________________________________________________
41. Do you think North Kerry and South Kerry should be marketed as one tourist location as opposed to currently being marketed by Shannon Development and Cork/Kerry tourism respectively?

Yes □ No □

Please state why you answered yes/no above.

________________________________________________________________________

________________________________________________________________________

42. In your opinion, what would enhance business in the area?

________________________________________________________________________

________________________________________________________________________

*Thank you for your co-operation.*
Appendix C


We hope that you are having an enjoyable time in Tralee. Please help us to complete this short survey which examines what visitors think of Tralee and how the services here can be improved. Your answers will be a big help and much appreciated.

1. **In what country do you normally live?**
   - Ireland (please state county)
   - England
   - Scotland
   - Wales
   - Germany
   - France
   - Benelux Countries
   - Italy
   - Other E.U.
   - Other Scandinavia
   - U. S. A.
   - Canada
   - Australia
   - New Zealand
   - Other (please specify)

2. **Had you heard of Tralee before you arrived in Ireland?**
   - Yes
   - No

3. **How did you first hear of Tralee?**
   - Exhibition / Workshop
   - Brochure
   - Travel Agent
   - Friends / Relatives
   - School / Personal Reading
   - Advertising
   - Press Story
   - Rose of Tralee Festival
   - Other (please specify)

4. **What is your main reason for visiting Tralee?** (tick one only)
   - Business
   - Holiday / Pleasure
   - Conference / Seminar
   - Day Trip
   - Visiting Relatives
   - Other (please specify)

5. **What form of accommodation are you using in Tralee?**
   - Hotel
   - Guesthouse
   - Farmhouse
   - Town & Country Home
   - Friends / Relatives
   - Camping / Caravaning
   - Hostel
   - Self Catering
   - None
   - Other (please specify)

6. **What entertainment did you / will you avail of in Tralee?**
   - Singing Pubs
   - Traditional Irish Music
   - Siamsa Tire
   - Cabarets
   - Other
   - Water based Activities
   - Sightseeing / Touring
   - Fishing
   - Bowling
   - Walking
   - Shopping
   - Other (please specify)

C-1
8. What were the good and the bad aspects of your visit to the Tralee area?

Good: ____________________________________________________________

Bad: _____________________________________________________________

9. Which visitor attractions in Tralee did you visit or intend visiting on this trip?
Aquadome ____ Blennerville Windmill & Visitor Centre ____ Geraldine Experience ____
Steam Train ____ Siamsa Tire the National Folk Theatre ____ Kerry Co. Museum ____
Other (please specify) ____________________________________________ None ____

10. Would you visit Tralee again? Yes ____ No ____
Why? __________________________________________________________

11. Would you recommend Tralee to your friends? Yes ____ No ____
Why? __________________________________________________________

12. What would make your stay in Tralee more enjoyable?
________________________________________________________________

13. (i) Are you travelling? Alone ____ With a friend ____ In a group ____
As a couple ____ As a family ____
(ii) Number in party? ______


15. What age group are you in? Under 18 ____ 35 - 44 ____ 55 - 64 ____
18 - 24 ____ 45 - 54 ____ 65 + ____
25 - 34 ____

16. Are you Married ____ Single ____ Widowed ____ Other ____?

17. What is your occupation or the occupation of the head of your household?
________________________________________________________________

Thank you for your co-operation.

C-2
Appendix D

Third Round of the European Structural Funds

The current European Commission proposals for the Third Round of the Structural Funds have been issued even though the funds will not come into effect until the year 2000. It is better known as Agenda 2000 and sets the EU Commission's financial perspective for the period 2000 to 2006.

Main Changes¹:

- The fourteen Community Initiative Programmes will be reduced to three.
- The present seven structural fund objectives will be reduced to three.
- In the new objectives 2 and 3 social exclusion will be given a more central role.
- An overall shift in the placement of resources to central and eastern Europe will occur.
- Some of those benefiting will be six countries which are expected to join the EU in the year 2003 or thereafter.

Finance:

- Total fund valued at 275bn. ecu.
- 210bn. ecu for the existing 15 member states - a rise of 5% from 200bn. ecu in the second round but a decline in real terms.
- 45bn. ecu for the six prospective new member states, and another 7bn. ecu as pre-accession aid to these six and to other candidate countries prior to their joining.

Main themes:

- Structural fund aid should be more concentrated and more targeted. Objective 1 areas now covering 51% of the EU will cover 35% to 40% in the next round.
- Less packages with the aim of simplification of management and greater transparency.
- Performance-oriented with a more resolute role for evaluation, auditing and monitoring.

The Objectives:

- Objective 1. Areas lagging behind (as in the present round). It will enjoy two-thirds of the second round's resources and will include areas that are being phased out of Objective 1 status.
- Objective 2. Areas undergoing economic and social restructuring with high levels of unemployment. Other criteria for inclusion will be industrial employment, agricultural operations and degree of social exclusion. While the level of unemployment is not expected to trigger Ireland's inclusion in Objective 2, the other criteria should be sufficient to achieve this.
- Objective 3. A horizontal human resources measure to modernise systems of education, training and employment in countries that suffer less significant social problems.

Ramifications for Ireland:

- All of Ireland will no longer be eligible for objective 1 status from the year 2000. The requirement for inclusion is that the country's Gross Domestic Product has to be 75% of the EU average or lower. At present Ireland's is in the order of 95% and rising which makes the country ineligible.
- To qualify for Cohesion funding Ireland has to have a Gross National Product that is less than or equal to 90% of the EU average. It is in this category currently but is predicted to exceed the threshold by 2000.
• Areas leaving objective 1 status will have their aid phased out gradually in a way as yet undefined. In this context the country may be divided up into different zones with some receiving objective 1 funding and others not. This would be a precedent in Ireland's case because it has been treated as one region since joining the EEC in 1973.

• One way or another there will be a significant decline in the level of aid which Ireland receives from the EU, and the focus will now shift to human resource elements as opposed to infrastructural developments.
Bibliography


Begg, I., & Green, D., Policy Can Tackle Peripherality, Irish Banking Review. Dublin, Spring, 1996.


