2010-01-01

Killarney Visitor Survey 2010

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KILLARNEY VISITOR SURVEY 2010

DIT-ACHIEV Project: *Achieving Sustainability in Killarney*

The DIT-ACHIEV Model for the Sustainable Management of Tourism has been developed by the School of Hospitality Management and Tourism, Dublin Institute of Technology and is endorsed by the Environmental Protection Agency and Fáilte Ireland. It explores six areas of investigation - ***Administration, Community, Heritage, Infrastructure, Enterprise and Visitor***.

The purpose of piloting this DIT-ACHIEV model in Killarney is to test its use with the objective to refine and adjust its methodology, so that it can be applied in any Irish tourism destination.

Early indications are that The Model will provide the Irish tourism industry with a valuable tool for making its product and management far more sustainable.

In addition to data such as environmental measurements, information on water, waste, energy, transport, examination of local cultural, environmental and employment statistics, the model requires the undertaking of three dedicated surveys:

- A Resident Survey
- A Business Survey
- A Visitor Survey

A survey of residents was undertaken at the outset of the year and the Business Survey was run during the latter part of the summer months. With the support of local volunteers and students, this year-long Visitor Survey has taken place throughout Killarney.

This report presents the main findings of 659 **Visitor Surveys** that were conducted between Nov 2009 and Oct 2010. The support of the surveyors is gratefully acknowledged, and it is hoped that the findings presented in this report will lead to much discussion and self analysis by the tourism industry in Killarney.

Purpose of Visitor Survey - Turning Findings into Actions

While this survey provides a wealth of information pertaining to Visitors to Killarney it is not an end in itself. Its main purpose is to lead to actions not just conclusions.

The main phases in the research model being followed in this overall project can be simplified as follows:

Data Collection

Data Analysis

Identification of Issues

Planning for the Future

All of this is undertaken under the framework of the internationally recognised ***DIT-ACHIEV Model for Sustainable Tourism Management***.

At this stage, a wealth of data has been collected and analysed for Killarney Town and Valley, ranging across the themes outlined above, the next phase will be to identify the most substantial issues which have emerged and to put action plans / methodologies in place, so that they can be treated in a systematic and organised fashion.

This will lead to Killarney becoming a more sustainably managed tourism Destination into the future.

Over the coming months, analysis of the various surveys and other data collection procedures of the ***DIT-ACHIEV Model*** will continue towards the identification of overarching issues of concern. In parallel with this, structures will be developed whereby planning for the future can begin.

This is an exciting and challenging time for Killarney tourism, and will ensure healthy and prosperous development into the future.

Survey Details

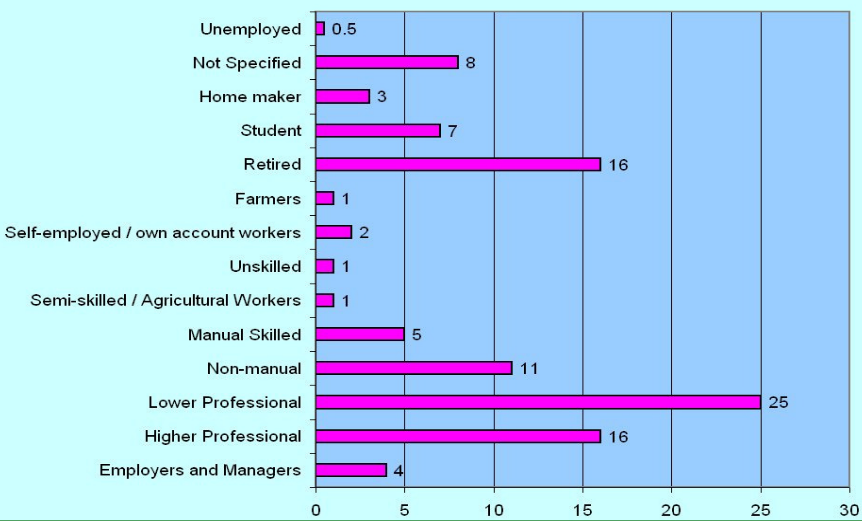
Locations Where Surveying Took Place: **Figure 1** illustrates where surveys took place. The fact that 67% took place at various accommodations must be borne in mind as it may impact on findings. Also, interpretation must be mindful of the high non-accommodation proportion undertaken in Muckross House and Gardens and the National Park.

Figure 1: Survey Locations	**% of Surveys**
Muckross House and Gardens	19
Woodlawn House (B&B)	16
Street Locations around Killarney	14
Outside Accommodations in Killarney	8
Parkfield House (B&B)	7
Neptune's hostel	6
Tourist Information Office	5
Flemings White Bridge	5
Killarney Park Hotel (5*)	3
Killarney Lakelands (Self Catering)	3
Muckross Traditional Farms	3
Knockreer, Deenagh Lodge	2
Killarney Riding Stables	2
Torc Waterfall (NP)	1
National Park	1
O'Sullivan's Bike Hire	1
Ross Castle & Environs	1
Other locations around Killarney	1
International Hotel (3*)	0.5
Flesk Camping	0.5
Ladies View (NP)	0.5
Total	**100**

Seasonal Distribution of Arrivals: **Figure 2** shows the seasonal breakdown of when surveys were conducted . The heavy emphasis on July–October might affect the findings, however local experience suggests that August and September tend to be the busiest months - followed by July and October.

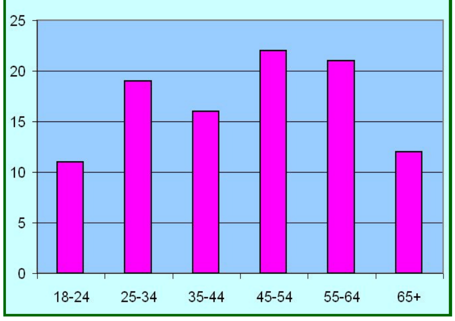
Visitor Profile

Figure 6 : Visitor Occupation (%)



Gender / Age: 55% of those surveyed were female, 57% were aged between 25 and 54 years of age (**See Figure 3**).

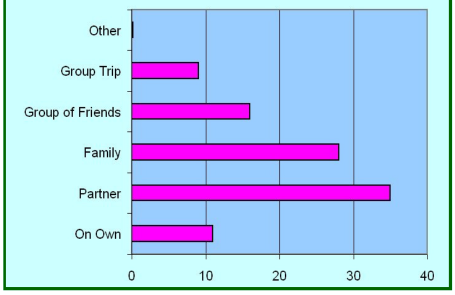
Figure 3 : Age of Visitors (%)



Party Composition: 35% were travelling with a partner (**See Figure 4**) and a significant 28% were travelling with their family, showing that Killarney appeals to this market segment.

Group Size: Nearly half of all visitors (47%) were travelling in a party of 2 people (**See Figure 5**) and a further 13% were in a party of four people.

Figure 4 : Party Composition (%)



Occupation: **Figure 6** shows that 45% of respondents were either employer/managers or professional (higher & lower), while a further 16% were retired and 7% were students.

Figure 2 : Seasonality of Visitor Survey (%)

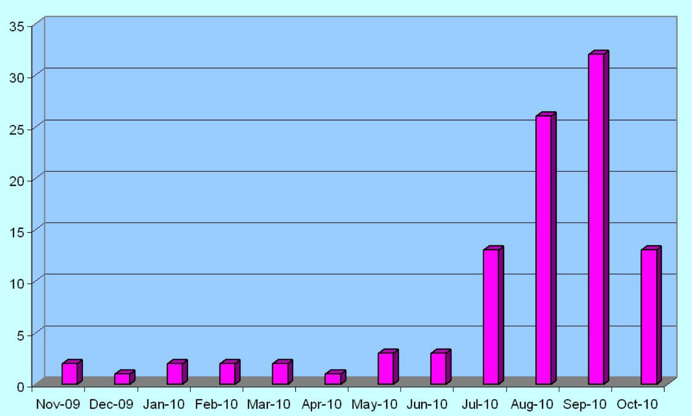
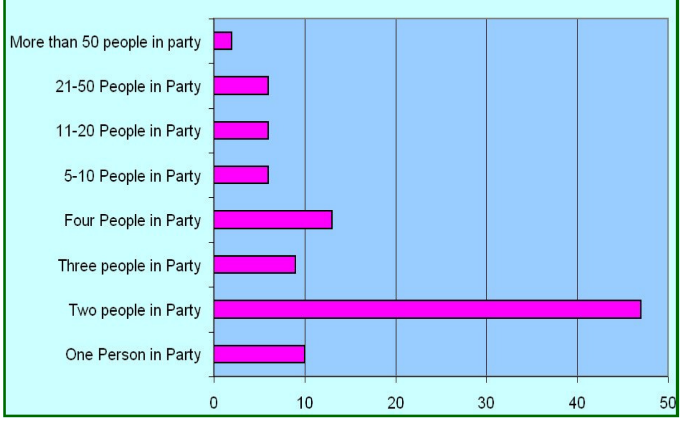


Figure 5 : Group Size (%)



Source Markets

Main Source Markets : 71% of the surveyed visitors to Killarney were from Overseas, 28% were from the Republic of Ireland and just 1% were from Northern Ireland (**See Figure 7**). Of the Overseas Visitors, 25% are from North America, 23.5% from Mainland Europe and 17% from the United Kingdom (of England, Scotland, Wales and Northern Ireland). A further 6% are from either Australia or New Zealand and 3% from 'Other Markets' including China, Middle East & South Africa). Looking more closely we see the following:

- Mainland Europe - 7% from Germany, 5% from France 3% from the Netherlands.
- North American - 22% from USA, 3% from Canada.
- Other Markets - 9.5% from Australia, New Zealand, Asia, the Middle East and South Africa.

Visitors from the Republic of Ireland: The majority of Domestic visitors indicated they were from Cork (24%) and Dublin (22%). 8% each were from Limerick and Galway, as summarised in **Figure 8**.

Figure 7 : Visitor Country of Origin (%)

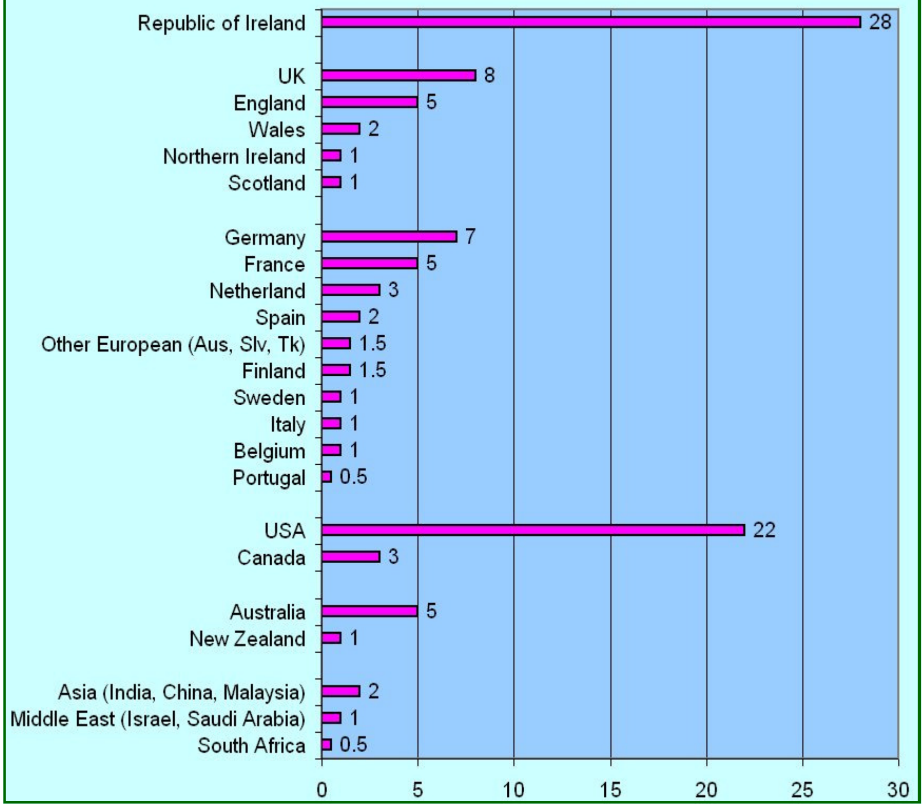
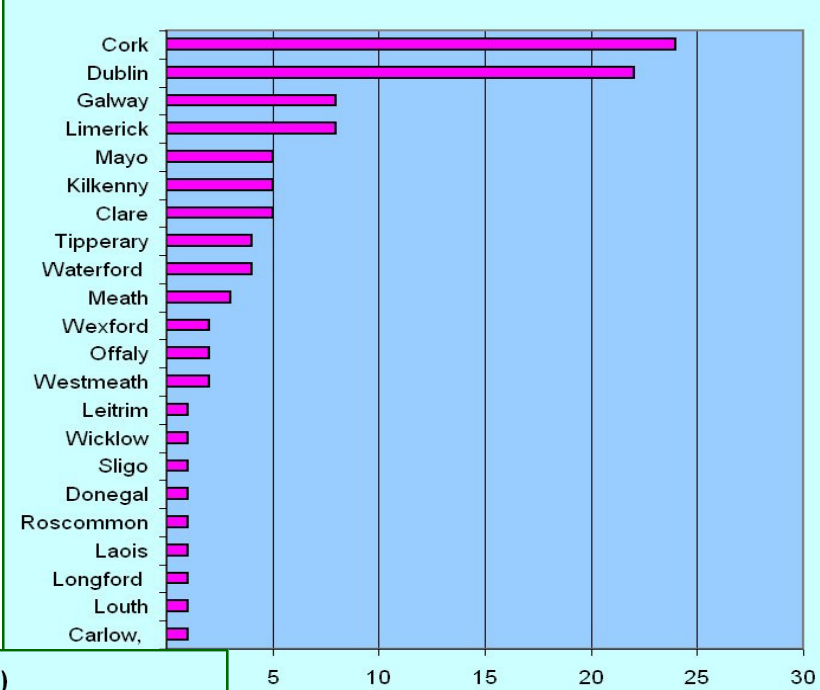


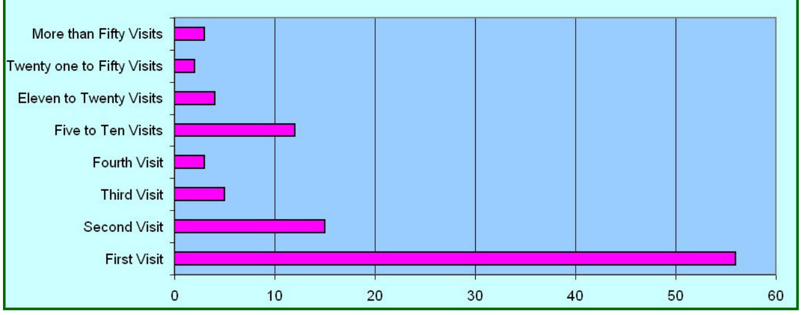
Figure 8 : County of Origin - Irish Visitors (%)



Repeat Business

Repeat Business: Visitors were asked how many times they have visited Killarney Town & Valley in the last 10 years. **Figure 9** shows that for 56% of visitors this was their first trip. There appears to be a large level of frequent repeat business. 15% (95) were on their second visit, 21% had visited more than four times and a further 12% had visited 5 to 10 times.

Figure 9: Repeat Customers (%)



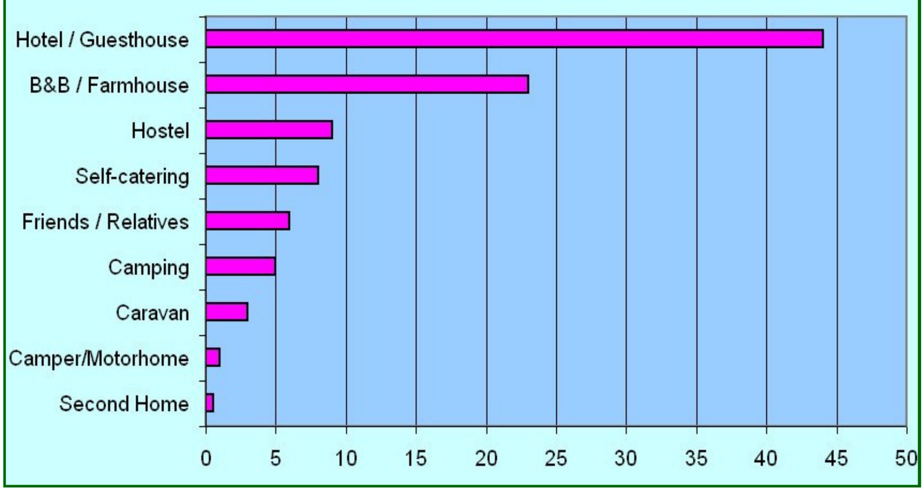
Overnight Stays

Staying Overnight: 88% of all visitors who were surveyed stayed in Killarney Town & Valley overnight (**Figure 10**). 84% of Domestic Visitors from the Republic of Ireland stayed at least one night; 100% of Northern Ireland Visitors stayed overnight and; 89% of Overseas Visitors stayed overnight. Thus, 16% of the Republic of Ireland and 11% of Overseas visitors were day trippers.

Length of Overnight Stays: The Average number of nights that visitors were staying in Killarney was 3.73 nights. While just 11% stayed one night in Killarney, 33% stayed 2 nights and 24% stayed 3 nights. The average number of nights that visitors were staying on their whole trip was 9.99 nights, showing that visitors are spending over a third of their total trip in Killarney. 25% of visitors stayed 10-14 nights on their whole trip.

Figure 10 : Visitors Staying Overnight (% of Each Market)

Figure 11 : Accommodation (%)



Accommodation Type

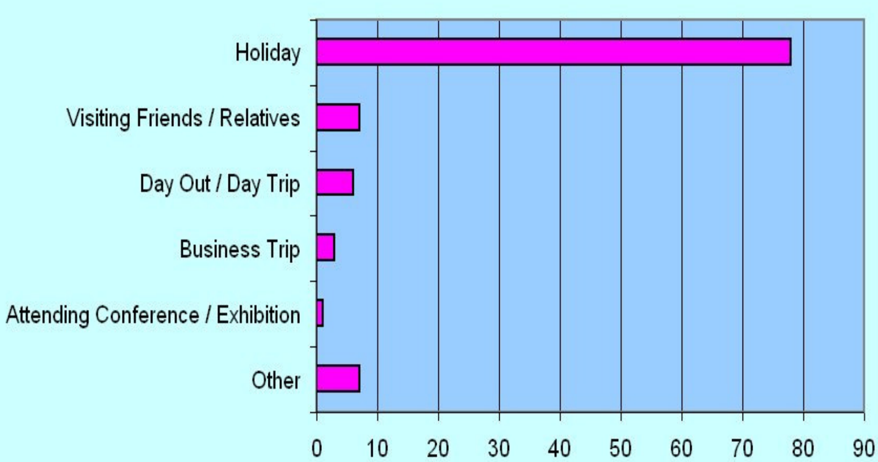
Type of Accommodation Used: 93.5% of surveyed visitors surveyed were staying in paid accommodation (**See Figure 11**). 44% stayed in either a Hotel or Guesthouse, 23% stayed in B&B / Farmhouse accommodation, 9% stayed in a hostel and 8% stayed in self-catering.

Why Choose Killarney

Identifying the main reason why people visit Killarney Town and Valley and the factors 'influencing' their decision to choose to visit the area can help to understand people's motivations and thus assist in marketing and selling Killarney.

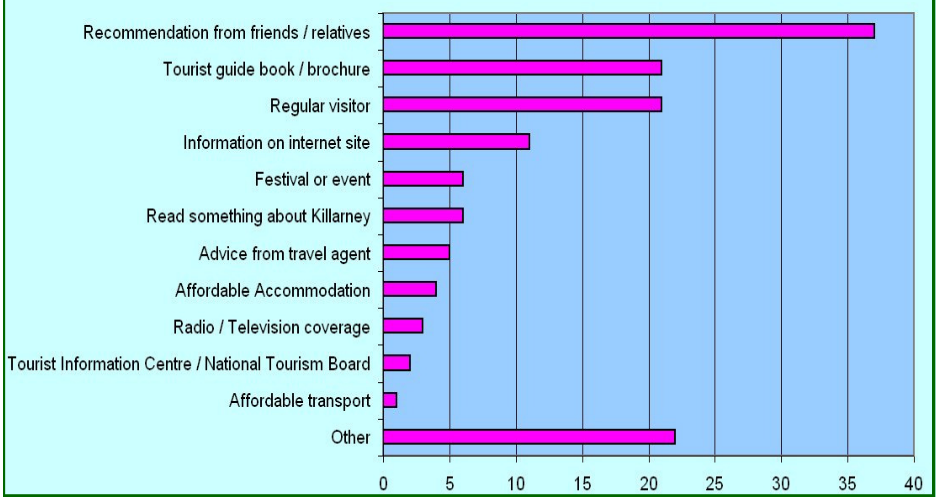
Main Purpose of Visit: By far the most popular reason for visiting was 'Holiday' which was the main purpose for 78% of visitors (**See Figure 12**). A further 7% were either 'Visiting Friends or Relatives' or for 'Other' reasons such as 'specifically to play golf / attend Irish Open' (9 respondents), being part of organised tour (9), attending a stag / hen (8) or wedding (6) or for genealogical reasons (6).

Figure 12 : Main Purpose of Visit (%)



Reason for Choosing Killarney Town and Valley: **Figure 13** shows the main factors influencing visitors to visit Killarney Town and Valley with 37% being influenced by recommendations from friends/ relatives and a further 21% being regular visitors. Combined, these account for 58% and a further 21% were influenced by a tourist guidebook/brochure. The internet was an influence for only 11% of

Figure 13 : Reasons for Choosing Killarney (Number)



visitors. Influences from traditional tourist information sources, such as travel agents and tourist information offices are extremely low at 5% and 2% respectively. Other factors influencing visitors to visit Killarney Town and Valley included:

- Being frequent visitor (20 respondents),
- Being part of a group e.g. active retired / part of tour (30),
- Attend a specific event (20) e.g. wedding / stag, get engaged, attend kids activities / dance camp,
- On business (2),
- To play golf (5)
- Genealogy – trace roots (20)
- Visit friends and relatives (20)
- Specific offer in hotel accommodation (20)
- Specific TV coverage (5) - e.g. 'tidy towns coverage on TV'; 'songs of Ireland' CD

Guide Books Used: A total of 79 respondents indicated that guidebooks influenced their decision to visit the Killarney area with Lonely Planet being the main one mentioned by name (21 mentions). The UK, French and German and to a lesser extent US markets, appear to be the main users of guide books.

Websites Used: The main websites identified were Tripadvisor (6), Google search engine (6), Discoverireland.ie (5), visitireland.com (3), Tourism Ireland website (2), various other sites were used by visitors, but they were unable to recall the name of the websites.

Activities Undertaken

Activities Undertaken: Figure 14 provides a summary of all the main activities visitors engaged in while visiting Killarney Town & Valley and shows that 82% of those who responded indicated that they visited a 'natural heritage site' such as Killarney National Park, Torc Waterfall, Killarney Lakes etc. Restaurants, pubs and shops appear to be strong beneficiaries of the tourism industry given that 78% of visitors dined in restaurants, a further 78% visited pubs / bars, while 73% went shopping. 62% went walking / trekking / climbing, while 59% visited 'built heritage sites' such as Muckross House or Ross Castle.

- Water-based activities relates to taking a boat trip on Killarney Lakes (48), Gap of Dunloe boat Trip (6), Boat to see Fungi the Dolphin (50), kayaking (3), visiting islands such as Garinish, Inisfallen (2) and to a lesser extent fishing or swimming at nearby beaches.
- Watching or participating in a sporting activity related to attending the Irish Open / playing golf or watching / playing GAA matches.
- 'Other' specific activities included Jaunting car ride (15), Spa treatments (5), Ghost tour (3), Nature photography & bird watching (3), kids activities (3), attending weddings / pricing for weddings (3), work activities (2), tour of Ring of Kerry (2).
- The excursions taken from the area included trips to the Ring of Kerry, the Dingle Peninsula and the Gap of Dunloe Tour.

Figure 14 : Activities in Killarney Town & Valley

(% all respondents engaging in each activity)

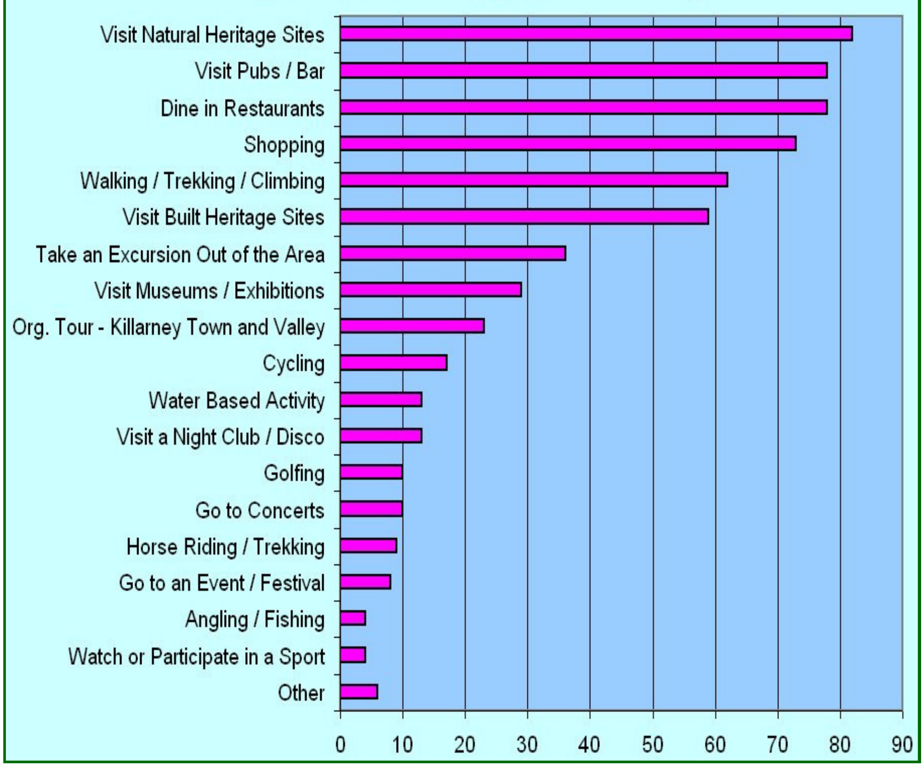
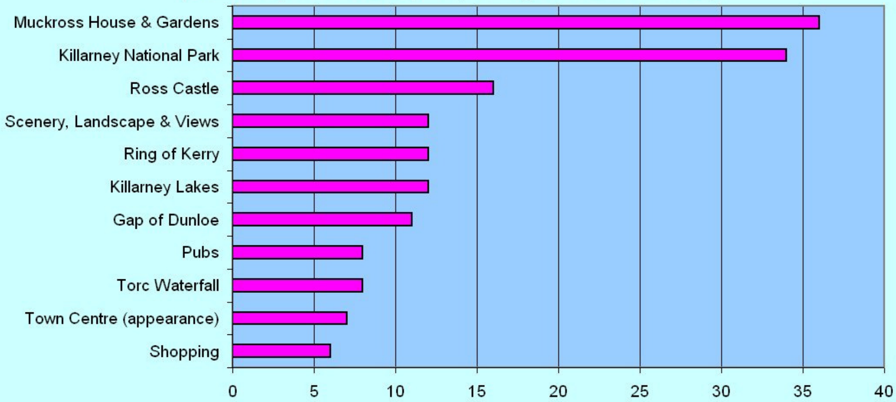


Figure 15 : Favourite Attractions %

(Chart represents top 11, many more selected)



Favourite Attractions

Favourite Attractions: **Figure 15** illustrates the attractions which visitors identified as their 'favourite's (individuals selecting up to 3 attractions). Muckross House and Gardens was named by 36%, with 34% choosing Killarney National Park. A further 4% specifically indicated Muckross Traditional Farms as a favourite. Further analysis shows that this figure of 34% for the National Park is actually higher when specific areas / sites of the Park are included such as Ross Castle (16%), Killarney Lakes (12%) Gap of Dunloe (11%), Torc Waterfall (8%), Ladies View (2%) and others.

The Ring of Kerry (12%) was also highlighted as a favourite attraction, as was the 'scenery, landscape and views' (12%)

Single Best Experience

Best Experiences: Respondents were asked to indicate the single best experience to date, of their visit to Killarney Town & Valley (**See Figure 16**). Again, the National Park (15%), Scenery (14%), Muckross (11%) and National Park are to the top, but also visitors praised the friendly and helpful people (13%) and the quality of their accommodation (5%). Praise of the Town Centre includes the town itself, its architecture, hanging baskets, historic buildings, trees, flowers, and streetscape were specifically mentioned.

Single Worst Experience

Worst Experiences: Respondents were also asked to indicate the single worst experience of their visit (**See Figure 17**). It is encouraging to note that 32% of visitors specifically stated that they had 'no bad experience'. The Chart shows that 'traffic congestion' and 'bad weather' (10% each) were the main negative experiences. The poor quality of roads (8%) in Killarney and its environs along with perceived poor value for money across a range of services such as restaurants, car hire etc (7%) were also mentioned. While the friendliness of the people was mentioned a number of times throughout the report as a strong positive element of visitors' visit to Killarney Town & Valley, curiously poor hospitality was noted by 6% as a negative experience.

Other issues mentioned included: late night noise, difficulties with jaunting cars, early closure of facilities, being too touristy, litter, dirty restaurants / pools / toilets, commercialization, lack of information on visitor attractions / where music is in pubs, signage within National Park, lack of public transport, horse dung, lack of cycle lanes, lack of child orientated attractions / facilities, lack of all-weather attractions.

Figure 16 : Best Experience in Killarney Town & Valley (%)

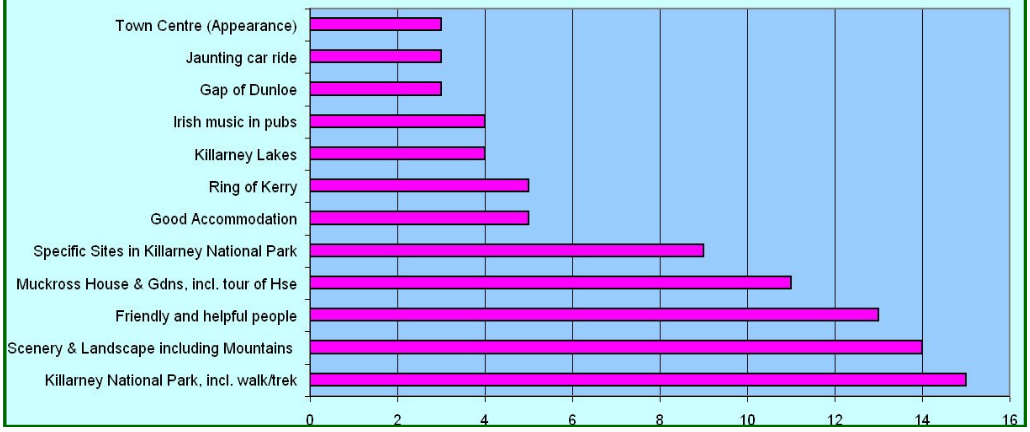


Figure 17 : Worst Experiences in Killarney Town & Valley (%)

Environment / Infrastructure Management

Visitor perception of local management issues was assessed through asking respondents to rate a series of management issues – classifying them as Excellent; Good; Fair; Poor; Very Poor or ; Don't Know. The various issues were overwhelmingly positive, as can be seen in the predominance of light blue (Excellent) and dark blue (Good) ratings, over pink (Very Poor) and yellow (Poor) ratings.

Environment / Infrastructure Management: The environmental / infrastructural issues (**See Figure 18**) with the highest levels of 'Excellent' rating were Quality of the Natural Environment (83% Excellent) and Quality of the Built Environment (61% Excellent). While Quality of Water in the Rivers and Lakes only received 44% in the 'Excellent' category, over a quarter of respondents (28%) stated that they were unable to rate it. The issues receiving the highest negative ratings were the Quality of Roads (13% 'Poor' or 'Very Poor'), Traffic Flow (10% 'Poor' or 'Very Poor') and Car Parking Facilities (6% 'Poor' or 'Very Poor')

Facility Management

Facility Management: The positive ratings mentioned above are even more evidenced in this set of data (**See Figure 19**). Restaurants received the highest percentage of 'Excellent' ratings (44%) while Walking Access received the highest combined positive ratings (Excellent and Good combined – 89%). Also scoring particularly highly were Management of Foot Paths (36% Excellent) and Variety of Attractions (32% Excellent). The highest scoring negative ratings were Signage (11% Poor and Very Poor combined), All Weather Facilities (8% Poor and Very Poor Combined) and Cycle Paths (6% Poor and Very Poor combined). The high percentages selecting 'don't know' for some of the facilities could be something for the Killarney area to consider for the future (these include: Facilities for people with disabilities (74% Don't Know); Sporting, leisure & activity facilities (60%); Cycle paths (56%); All-weather facilities/activities (47%); Cultural facilities (42%); Public Toilets (37%), indicating perhaps that they did not use these facilities and thus were not able to rate them.

Figure 18 : Tourist Perception of Environmental Management (%)

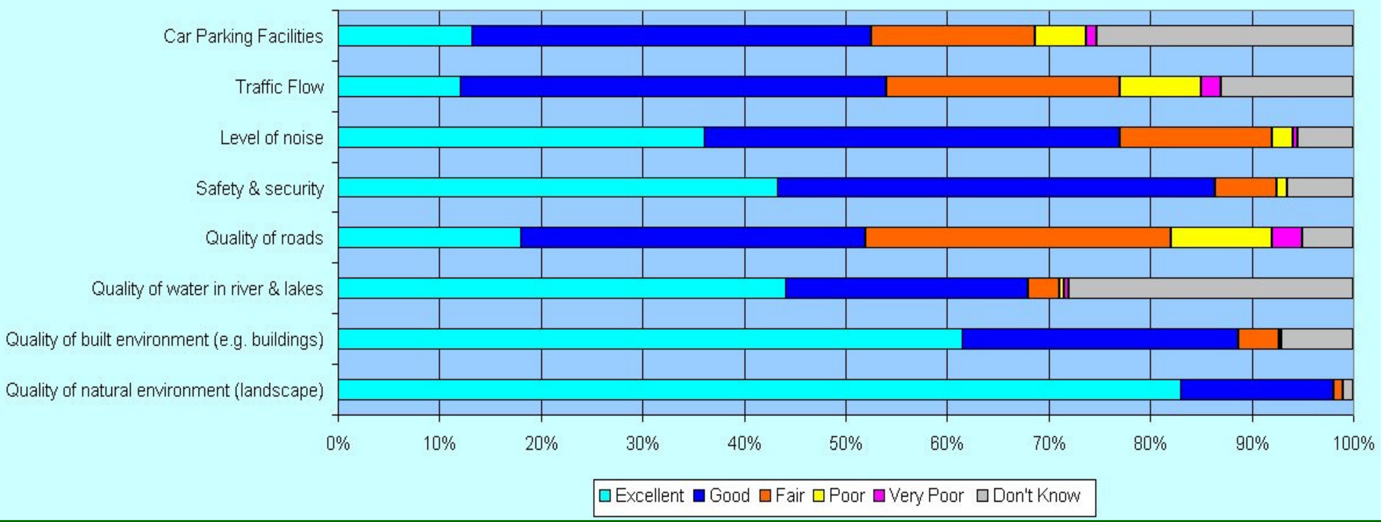
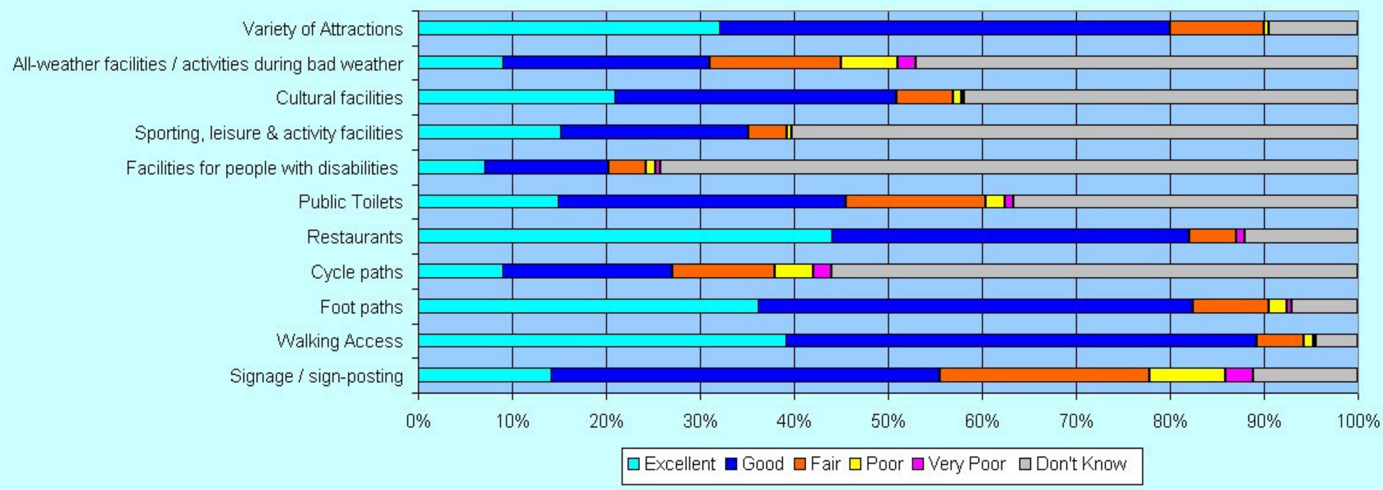


Figure 19 : Tourist Perception of Facility Management (%)

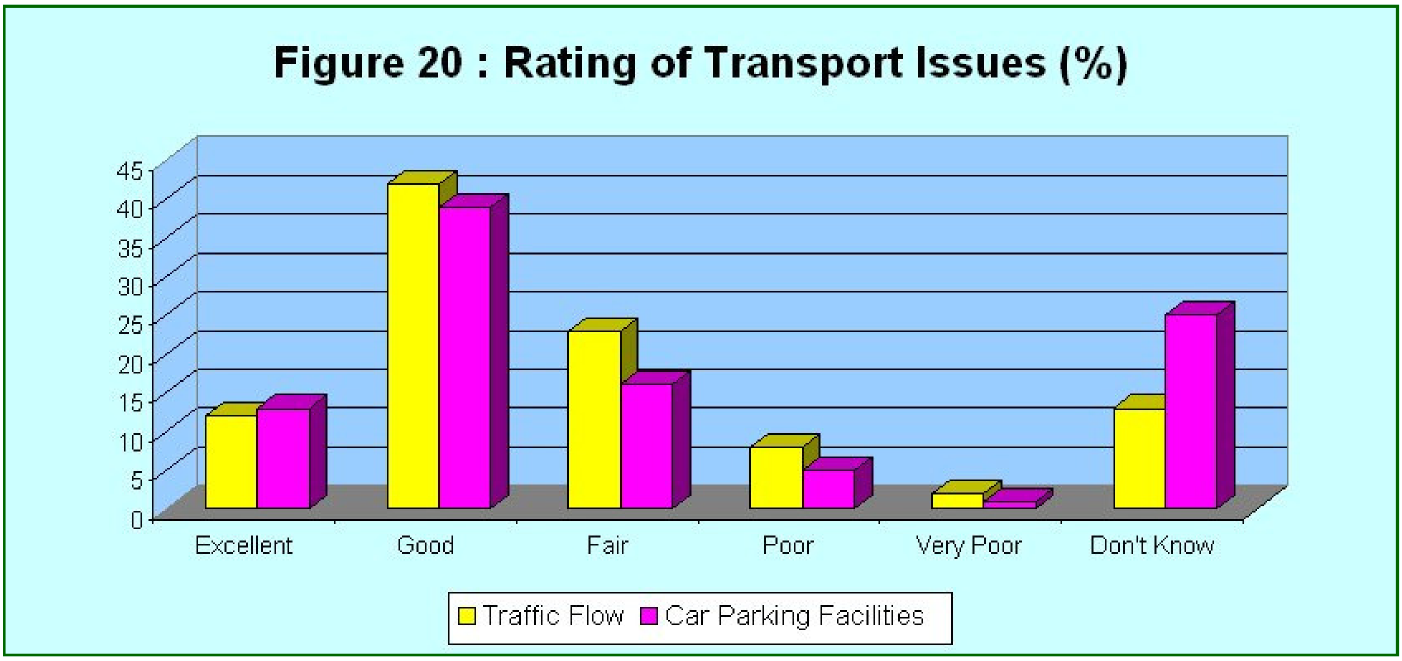


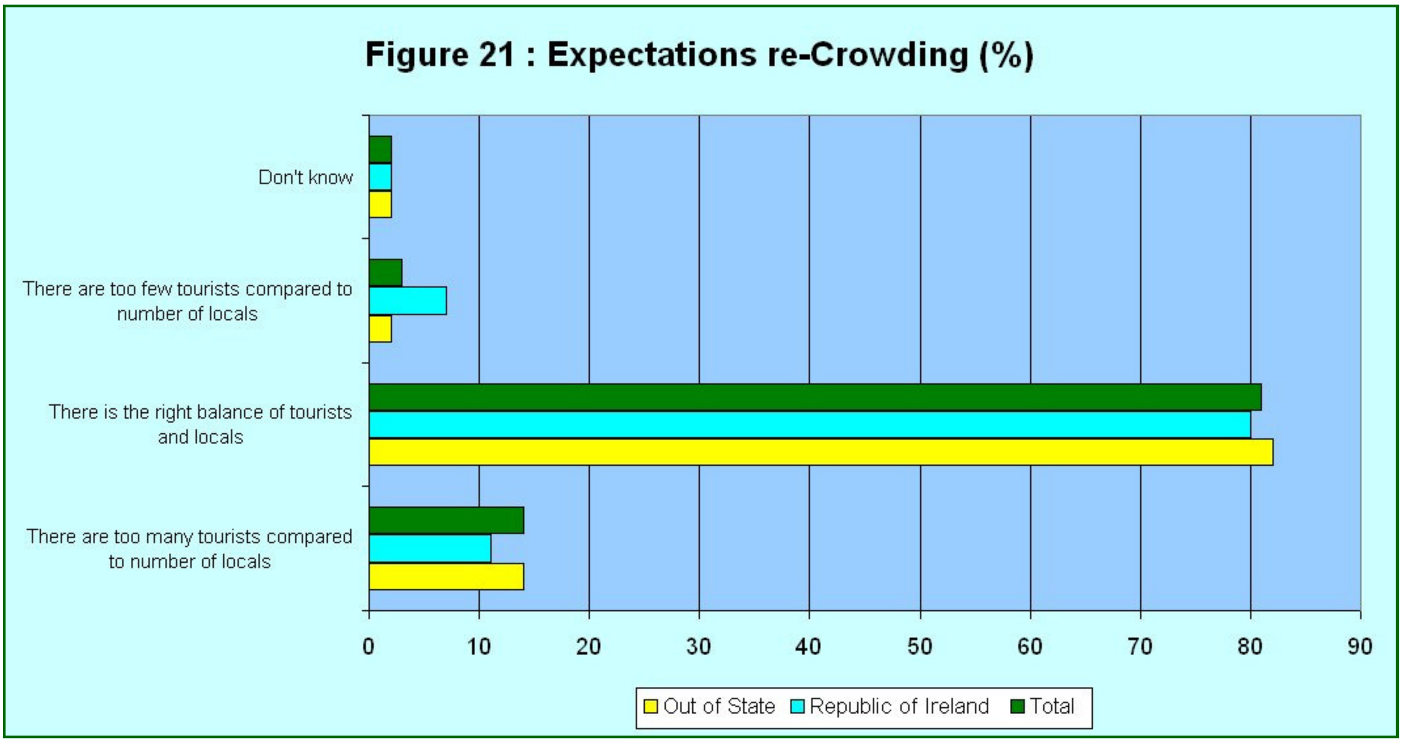
Transport Issues

Perception of congestion: Traffic flow was rated excellent or good by only 54% of visitors, with a further 23% only rating it as 'fair' (**See Figure 20**). The dissatisfaction with traffic flow appears to be due to problems with traffic congestion and lack of pedestrianisation and the associated difficulties with crossing the roads, as noted in open-ended questions. Car parking facilities was also rated excellent or good by only 52% of visitors, with 21% rating it fair or poor. The main difficulty with car parking facilities, as provided through open-ended questions, appears to be lack of availability and expense. The substantial number of 'don't know' responses refers to those that did not use any transport while in the area (on a tour bus, on foot etc), while some who had their own / rented cars did not appear to use them very much while in the area.

Crowding

Visitor View of Crowding: **Figure 21** shows that 81% of all visitors feel 'there is the right balance of tourists and locals'. In fact, at least 80% of all markets feel '*there is the right balance of tourists and locals'.* Slightly more Irish visitors would like to see more tourists in the area, and slightly more Out of State visitors would like to see fewer tourists.



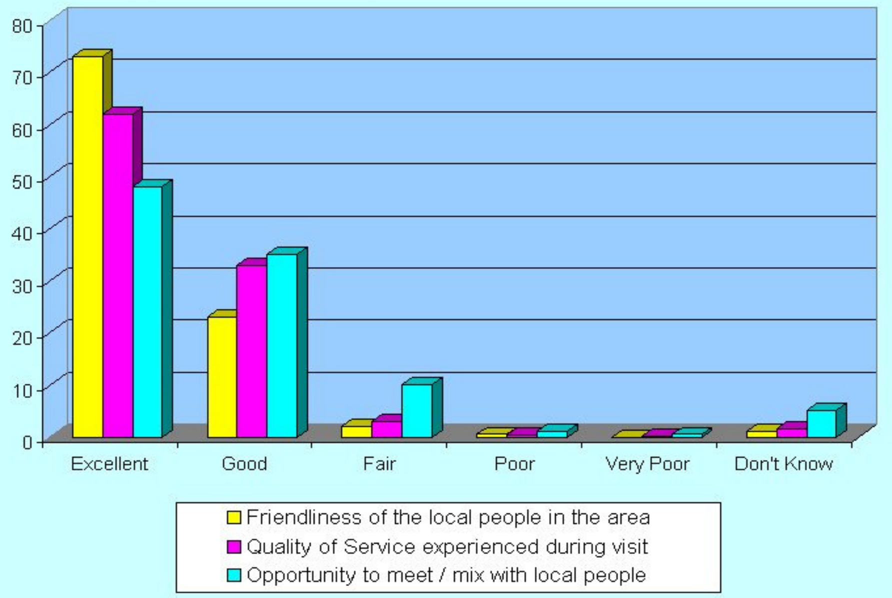


Local Friendliness / Quality of Service

Local Friendliness: Perception of local friendliness is extremely high as outlined in **Figure 22**. 97% rated friendliness it as either 'Excellent' or 'Good'. Furthermore an extensive number of comments were made relating to the friendliness of the local people, particularly regarding the specific accommodation they stayed. One of the conclusions drawn from this report is that the local people and their natural hospitality is one of the unique selling propositions of the area.

'Quality of Service' was also considered extremely high with 95% rating it as either 'Excellent' or 'Good' and visitors also appeared to be very satisfied with the 'Opportunity to Meet/Mix with Local People', with 93% rating it as either 'Excellent' or 'Good'.

Figure 22 : Rating of Local Friendliness (%)



Transport TO/ AROUND Killarney

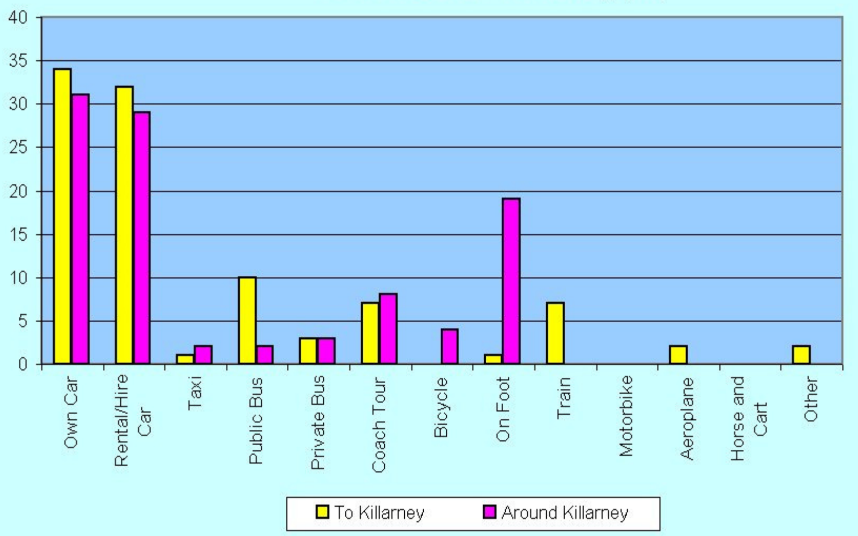
Assessment of transport options was conducted through identifying the forms of transport used to and around Killarney Town & Valley and the related rating of same.

Travel TO Killarney: **Figure 23** shows that use of own or rental / hire car were the main forms of transport used to travel to Killarney Town & Valley for 34% and 32% respectively. The third preferred option was public bus for 10% of respondents.

Travel AROUND Killarney: Use of own or rental / hire car were also the main forms of transport used to travel around Killarney Town & Valley for 31% and 29% respectively, with a further 19% walking around the area.

Other forms of transport to and around Killarney included Camper-van/Motor home (9), Friend's car (4), hired car and driver (1). Some visitors also accessed The Gleneagle Hotel's shuttle bus service.

Figure 23 : Main Mode of Transport TO / AROUND Killarney (%)

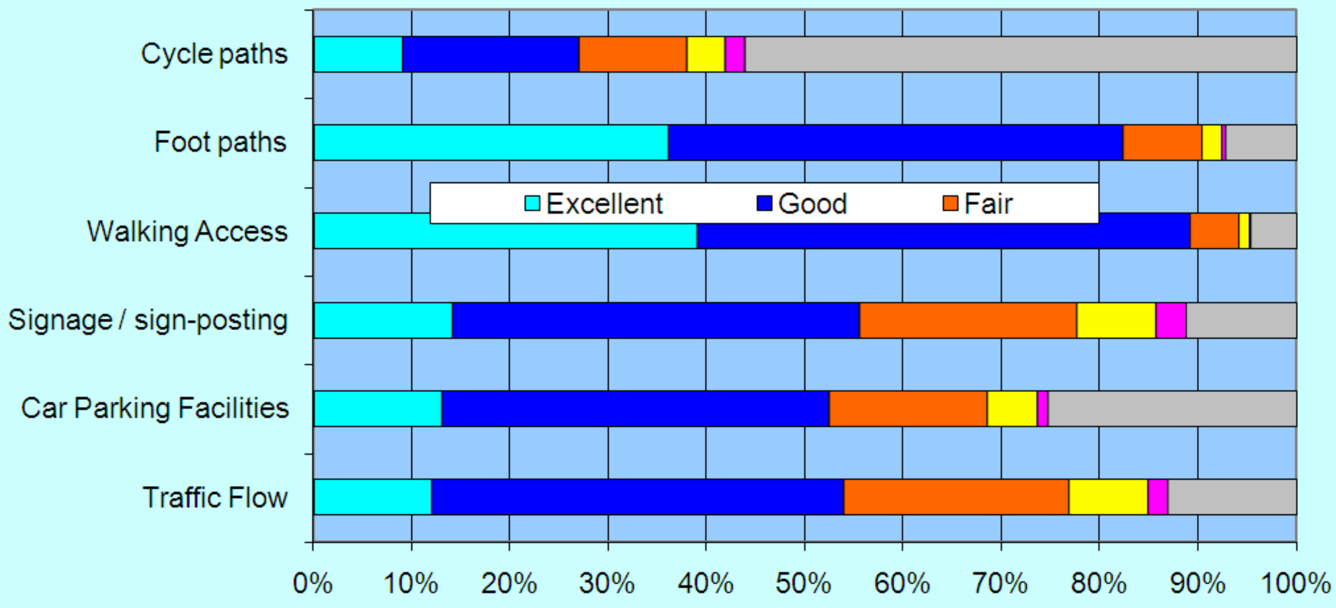


Public Transport

Public Transport: **Figure 24** provides a summary of the specific reasons for not using public transport in response to an open-ended question and shows that 36% did not avail of public transport since they were using their 'own' car or a rental car. A further 20% specifically indicated they preferred the flexibility / convenience of using a car - so they could determine their own journey while travelling around Ireland. 11% indicated there was none available, highlighting they might use public transport if it was available. Further analysis extrapolated from open ended questions suggests a latent need for public transport from Killarney Town to the National Park.

Figure 24 : Reasons for not using Public Transport	%
Own Car / Rental Car	36
Prefer flexibility / go as please around Irl.	20
None available	11
Prefer to walk / use bike	10
No need	9
Public transport not convenient / frequent	6
On a tour bus	5
Need own car for kids	1
Hotel has shuttle bus	1
Total	**100**

Figure 25 : Rating of Transport Management (%)



Transport Management

Rating of Transport Management: Visitors were asked to rate a range of transport management issues. **Figure 25** shows that 'Traffic Flow' was rated 'Excellent' or 'Good' by only 54% of visitors, with a further 23% only rating it as 'Fair', due mainly to traffic congestion and lack of pedestrianisation. Car Parking Facilities were also rated 'Excellent' or 'Good' by only 52% of visitors, with 21% rating them 'Fair' or 'Poor' - mainly in comments, due to lack of availability and poor value. Rating of Walking Access was the highest positively rated transport issue with 89% rating it as either 'Excellent' or 'Good', 33% rated signage/sign posting as either 'Fair', 'Poor' or 'Very Poor'.

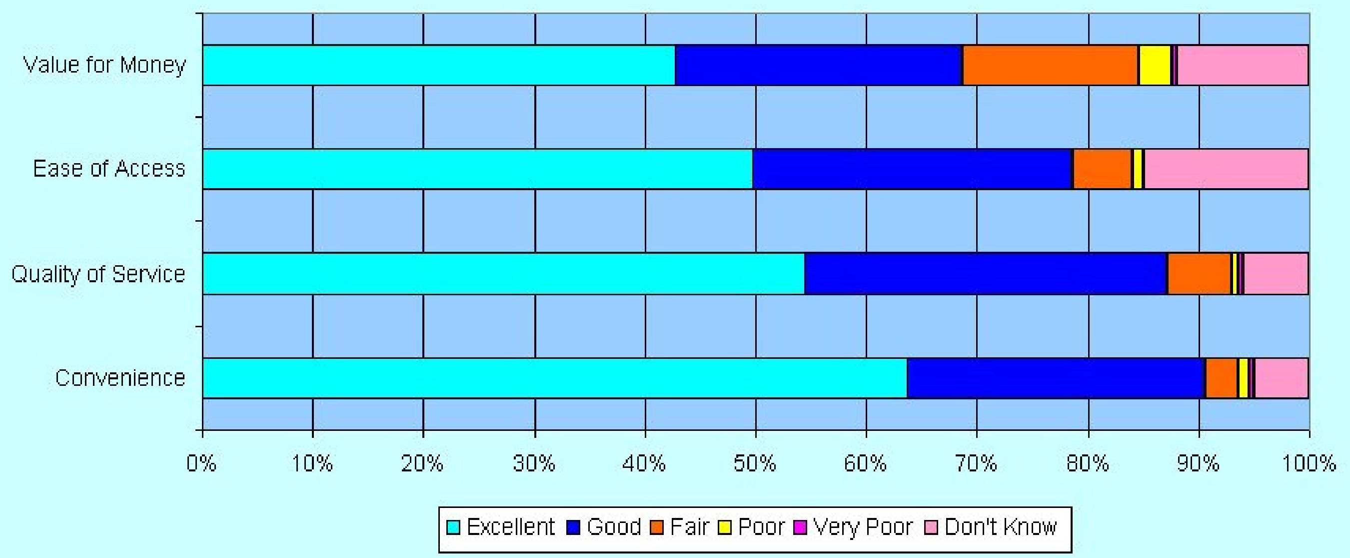
Rating of Transport Used

Rating of Transport Used: Respondents were asked to rate the type of transport they had used most often in relation to a number of areas. **Figure 26** shows that rating of 'Convenience' was highest with 91% rating it as 'Excellent' or 'Good'. This is possibly reflective of use of own / rented car or those who travelled 'on foot'. Rating of 'Value for Money' was lowest but 69% still rated this as 'Excellent' or 'Good'.

Visitor Spend

In order to accurately outline the average daily spend per person, it is important to take into account a number of factors. **Figure 27** shows the 'most frequently amount paid' per individual expenditure item of B&B, Room, Food, Drink, Shopping,

Figure 26 : Rating of Most Frequently Used Transport Mode (%)



Entertainment, Transport, Miscellaneous and Total Daily spend. The is the amount most commonly mentioned by respondents. The Average figure relates to the average amount spent on each individual item. The majority of those who indicated they were on a package holiday / organised tour were unable to provide daily spend on accommodation, transport and in some cases food and thus their expenditure has been omitted from the analysis.

Bed and Board: The most frequently daily spend on B&B was €35 per person per day. The minimum and maximum spend were €10 and €220 respectively - this being reflective of the range of accommodation that visitors used from camping and self catering to five star hotels. Some respondents were day-trippers, while others were staying in a second home or with friends/relatives and thus did not spend any money on accommodation.

Room only: The most frequent daily spend on Room Only was €30, while the average was €35.12 per person per day. The minimum and maximum amounts were €10 and €95 respectively

Food: The most frequent daily spend on Food was €30 per person per day. The maximum spend was €200 while some visitors indicated that their food was included in their package and thus were unable to separate out this cost.

Drink: The most frequent daily spend on Drink was €20 per person per day, while the average was €25.38. The maximum amount was €200. These figures demonstrate that the pub/bar trade is a major beneficiary of the tourism industry.

Shopping: The average spend on shopping was €51.01 per person per day. The maximum stated amount was €560. This latter figure is reflective of a number of respondents who specifically visit Killarney to shop. From other elements of the survey, it is clear that Killarney is considered a very good shopping town.

Entertainment: The average spend on entertainment was €22.86 per person per day with a maximum of €110 - reflective of people attending events at the INEC.

Transport: The average daily spend on Transport was €24.34 per person per day. Some visitors walked, and thus spent nothing on transport, while others were on a tour and all transport costs had previously been included in their package and thus are not included in this analysis. Transport costs included rent-a-car, petrol, public bus and trains, taxi fares, jaunting car fares, boat trips and bus day trips to nearby attractions such as Ring of Kerry tour.

Total Daily Spend: This Table shows that the average daily spend was €152.07 per person per day. This takes account of the minimum and maximum amounts of €5 and €780 respectively. This range reflects the range of accommodation that visitors used from camping and self catering to use of five star hotels, the various socio-economic groups from students to higher professionals, the level of expenditure on individual items such as shopping etc. The total daily expenditure includes some respondents who just gave a total amount spent per day and did not answer the individual expenditure items.

Figure 27 : Average Daily Spend (€ Per Person)

Item of Expenditure	*Most Frequent Spend*	*Average Spend*
Bed & Breakfast	€35	59.13
Room Only	€30	35.12
Food	€30	37.28
Drink	€20	25.38
Shopping	€50	51.01
Entertainment	€20	22.86
Transport	€20	24.34
Miscellaneous	€10	22.42
Total Daily Spend	***€100***	***152.07***

Arrival to Ireland

As outlined previously 71% of visitors to Killarney Town & Valley were from Overseas. The following Figures provide a profile of the respondent's travel patterns.

Original Port of Departure: 35% of overseas visitors original airport of departure was from various US airports, including JFK, Newark, Boston, Phoenix, Chicago, Atlanta, San Francisco, Los Angeles, Washington DC, Florida, Denver and Philadelphia. 13% departed from one of 4 London airports of Heathrow, Stanstead, Luton and Gatwick, 8% from UK Seaports and a further 7% from other UK airports.

Port of Arrival into Ireland: Dublin Airport was the port of arrival for 55% of overseas visitors (**See Figure 28**). A further 12% arrived through Cork Airport, 11% through Shannon and 7% through Kerry Airport. 9% arrived through Rosslare Europort and 3.5% arrived through the combined Ports of Dublin and Dun Laoghaire.

Figure 28 : Point of Arrival in Ireland (%)

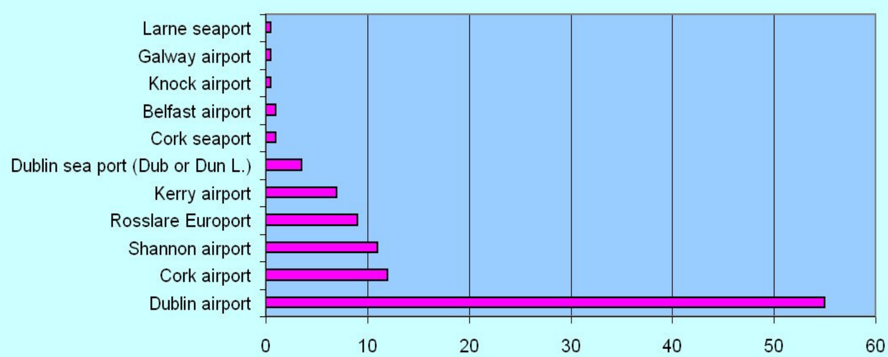
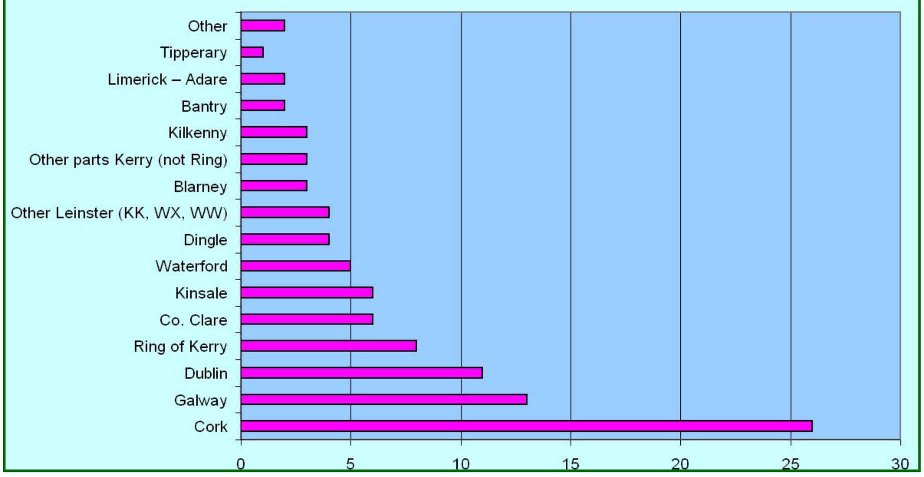


Figure 29 : Last Stop Before Killarney (%)

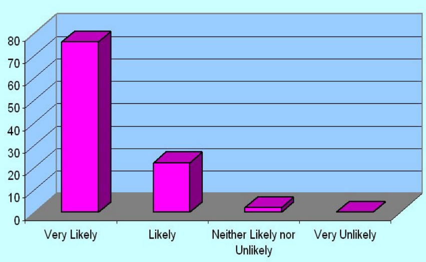


Visitor Travel Patterns

Routing Travel Patterns - Last Stop: Nearly one fifth of domestic visitors indicated they live in Cork and this might impact on the finding of 26% travelling from their most recent stop in Cork (**See Figure 29**). Overall a pattern of circulation around the coast of Ireland is evident. However a variety of routes appear to be used with short stops – Cork, Ring of Kerry (8%), Clare (6%) and longer trips from Galway (13%) and Waterford (5)%.

Routing Travel Patterns – Next Stop: Figure 30 shows that 16% of visitors were travelling to Dublin as their next stop, and after that a similar pattern exists to the 'last stop' data discussed above. 18% were travelling to Galway next and 13% were travelling onto Dingle. Cork (11%), Clare (11%) and other sites are further down the list.

Figure 31 : Respondent Would Recommend Killarney Town & Valley (%)



Final Comments

Recommendation : Figure 31 shows that 98% of respondents are either likely or very likely to recommend Killarney Town & Valley to friends and relatives Only one respondent in the entire survey stated that they were Very Unlikely to recommend Killarney to friends and relatives.

Overall Satisfaction: Respondents rated their visit to Killarney Town & Valley **8.87** out of a potential 10. The main reasons for their positive rating was due to their satisfaction with excellent accommodation, the people, scenery, bustling nature of Killarney Town, good choice of restaurants and bars and the fact that they always enjoy their visit to Killarney, indicating a high level of repeat business. Poor weather and possibly congestion and slight commercialisation of Killarney appeared to be the main reasons for some dissatisfaction.

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Figure 30 : Next Stop after Killarney (%)