The Impact from the Loss and Reinstatement of the Cork-Swansea Ferry Service on Tourism in West Cork

Bachelor of Business (Hons) in Tourism and Hospitality Management

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DECLARATION

I declare that this project is presented in partial fulfilment of the requirements for the Degree of Bachelor of Business (Honours) in Tourism and Hospitality Management. It is entirely the work of the author and has not been submitted to any other university or higher education institution, or for any other academic award in this institute. Where work of other people has been used, it has been fully acknowledged and referenced.

Signed __________________________    24th March 2011

Eoin Moynihan
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ABSTRACT

The aim of this study is to investigate the impact, if any, on tourism in the West Cork region from the loss and reinstatement of the Cork-Swansea passenger ferry service. The objectives are to gauge the approximate levels of business before the loss of the ferry, during its absence and following its reinstatement. A quantitative research method is adopted incorporating the administration of specifically designed questionnaires to a representative group of tourism operators in a sample area of West Cork. There is a perception that business was impacted during the period without the ferry. Tourism operators in the area reported the global recession as being an equally, if not more important factor. Informative results were found in the relationship between the loss of the ferry service and levels of business in the tourism industry in West Cork.
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INTRODUCTION

The tourism and hospitality sector continues to be a major economic force in the Irish economy, providing jobs and helping to generate revenue. Transport links are vital to peripheral rural destinations. In 2006, a major transport link between Cork and Swansea in the United Kingdom ceased operations. At the time of the operation was wound up, it was still a profitable business which carried thousands of visitors between Cork and the United Kingdom annually.

In today’s rapidly globalizing world, it is vital for regions to engage in “territorial competition” (Messely, Lie et al, 2009). One of the three defined needs for tourist transport to fulfil is transporting the tourist from the generating to the host area, creating accessibility. The development and expansion of tourism in a destination are based, in part, on the need for access to the area (Page, 2005). This thesis examines the impact on the tourism industry in West Cork from the loss of the passenger ferry service between Cork and Swansea.

The aim of the research study is to investigate the effects from the loss and reinstatement of the passenger ferry service on tourism operators in the region.

The objectives are as follows:

1. To identify any impact on the tourism operators from the cessation and resumption of the Cork Swansea ferry service.
2. To isolate the changing travel patterns of overseas tourists from the ferry situation.
LITERATURE REVIEW

1.1 Introduction

In this study, the relationship between transport links and a peripheral rural tourist destination, specifically the region of West Cork will be examined. In particular, the impact of the cessation of a vehicle carrying passenger ferry link between the Port of Cork and Swansea in Wales, United Kingdom on the tourism industry in West Cork. A general background of the tourism trends in Ireland, in West Cork and of the transport links will be examined.

1.2 Tourism Trends

Overseas visitors to Ireland grew from less than two million to over six million between 1985 and 2000. In figures from Fáilte Ireland (2008), after a dip following the terrorist attacks in 2001, visitor numbers increased to a record of 7.7 million in 2007. In his well researched paper, Prosser (2009) identifies two important trends. He studied visitor statistics from Fáilte Ireland and the Central Statistics Office and found that overseas visitors are staying for shorter periods of time and tourism activity has become ever more concentrated in Dublin.

Between 2000 and 2007, visitor numbers to Dublin increased by 32% whilst the rest of Ireland increased by only 17%. Significantly, visitor expenditure in Dublin grew by 83% whilst only increasing by 32% in the rest of the country. Prosser (2009) also determines that a key factor in the change in Irish tourism is the changing British inbound market. Importantly, up to 2007 the number of British visitors to Ireland had grown by 250% since 1983, but the average length of stay has declined by 44% from 8.4 nights to 4.7 nights in 2007.

Prosser (2009) argues that the key factor affecting this trend is the shift in mode of transport used by British visitors to Ireland from cross-channel sea ferries to air transport. The number of cross-channel visitors arriving by air exceeded the number arriving by sea in 1998. In 2006, four times more air travellers arrived than sea travellers. Also, the number of visitors travelling with their own car has declined from 61% in 1995 to 12% in 2006. This has affected travel patterns within Ireland as rather than taking an extended break to explore rural Ireland, an increasing proportion of British visitors travel to Dublin by air for shorter breaks.
This has resulted in a decline in participation in active outdoor pursuits such as hiking, golf, fishing etc. by British visitors by as much as 90% between 1995 and 2005. Prosser found a strong correlation between the decline in the average length of stay of British holidaymakers and Ryanair passenger numbers.

In the widely read book by Page (2005), one of the three defined needs for tourist transport to fulfil is transporting the tourist from the generating to the host area, creating accessibility. The development and expansion of tourism in a destination are based, in part, on the need for access to the area.

In their published article, Dickinson and Robbins (2008) state that the ability of tourists to effectively travel around destination areas is crucial for tourism. In their visitor attraction survey they found the main reasons for car use by tourists were convenience and ease of use, followed by the need to carry equipment, independence and flexibility, speed and presence of children. It also found that car use is more important when there is a lack of alternative public transport options. Specifically, they mention that this is a challenge to destination managers and transport providers to develop innovative and effective transport solutions and to use transport to add value to the leisure experience. In his published article Palhares (2003) argues that transport infrastructure can help gateway nodes to generate tourism in the region.

1.3 West Cork Tourism and Transport

West Cork Development Partnership (2007) describes the West Cork area as being situated in the Cork/Kerry region, which attracted 3.6 million visitors in 2006. The British market comprises 22% of all visitor numbers. Overseas tourists to County Cork totalled 1.4 million in 2006. British travellers comprised 21% of all visitors in 2006. Importantly, visitors from Britain are more likely to visit in the high season. West Cork enjoys a high recognition factor in domestic and overseas markets. In its use of the Defert Index to measure the relative intensity of tourism, it revealed that the towns and hinterlands of the biggest towns in West Cork have a significant critical mass and reliance on tourism activity. One element favouring the product base currently being developed in West Cork is the increased sophistication of international tourism with increasing demands for environmental quality and a growing preference for natural resource type activities and amenities. Citing a consumer response survey from 1999-2006 by Fuchsia Brands, a development initiative of West Cork
Development Partnership, they state that West Cork has enduringly high levels of satisfaction ratings for product quality, service quality, friendliness, food and value for money.

In the NUTS II regional strategy it was stated that West Cork (together with South Kerry and West Clare) could be regarded as the only remote and disadvantaged area of the region, being peripheral and under-developed. West Cork Development Partnership (2007) states that the West Cork region is located on the south-western periphery of Ireland. It is a distinctive natural area representing approximately 40% of rural County Cork, with a population of around 101,000. The road network remains the principal means of access and transport in the region. The main access road to the south western areas is the 128km N71 National Secondary Route which links the principal towns in the region. While West Cork was historically well served by rail transport as described by Shepherd (2005), this was closed on 1 April 1961. The Port of Cork is Ireland’s second largest. The deepwater berth at Ringaskiddy is of strategic importance. West Cork Development Partnership (2007) found that the suspension of the Cork-Swansea passenger service in 2007 had a disproportionate negative impact in the West Cork region, with many tourism establishments reporting loss of market and income.

The West Cork Development Partnership’s Development Plan (2007) describes the recently upgraded Cork Airport as being located on the eastern boundary of the West Cork region and that 80% of the population is within 90 minute journey of the facility. Relevantly, the plan suggests that previous targets regarding passenger numbers and route growth will be more difficult to achieve due to rising fuel cost, the peak of low-cost air travel and environmental concerns. According to figures from Cork Airport (2011) 2.43 million passengers used Cork Airport in 2010 on 60 routes, both domestic and international. This is down from the 3.2 million passengers in 2007 noted in the West Cork Development Partnership’s Development Plan (2007).

In their presentation paper Messely, Lie et al (2009) describe the need for regions to engage in a process of “territorial competition” within the globalising world. Accordingly the identity of the region is used as a starting point to brand a region and differentiate it from others. To achieve this branding, the region as a whole becomes a product or brand and offers a complete range of regional products and services. The authors present the advantages of regional identity identity as a mobilizing force for rural development. In their paper they used the West Cork region as an example of best practice in this area.
The Regional Branding Strategy developed by the West Cork LEADER Co-operative is an example of an integrated territorial approach. The Fuchsia Brand was set up to provide an infrastructure to network between various agencies such as development and public and commercial enterprises. It was established by the West Cork LEADER Co-operative to closer integrate development among the tourism, craft and food industries of the region. The concept involved establishing and communicating brand values, i.e. to develop a branded identity for local goods and services, both as an indicator of origin and as a “symbol of inherent quality”. Another important aim of the brand was to promote West Cork as a “Place Apart” with emphasis on the location, tradition and history of the area.

The publication of “Perspectives on the West Cork Regional Brand” (2008) describes the tourism product of West Cork as it relates to the Fuchsia brand. It states that competition in tourism has moved from competition between firms to competition between destinations, due to the effects of globalisation. Due to this, destinations must distinguish themselves by any means of a competitive advantage if they are to survive.

It also alleges that Ireland has lost its competitiveness somewhat in the first decade of the twenty-first century, especially at a time when competition is growing from other destinations in Europe and further abroad due to the growth in travel options from low-cost airlines in particular. To counter this, the Fuchsia Brand aims to place emphasis on quality and value for money and to deliver high-quality distinctive experiences using Destination Quality Management. Destination Quality Management is derived from Integrated Quality Management, defined by Go & Govers (2000) as the need for every enterprise in a destination, not just its public management, to be committed to meeting customers’ needs. This is important because customer need and business goals are increasingly inseparable, and destinations are becoming reliant on delivering quality products and services. This is especially important in West Cork due to the predominance of small and medium-sized enterprises. Many of these small businesses suffer from “resource poverty” – affecting their uptake of training. To counter these serious implications for quality and consumer satisfaction, the Fuchsia Brand initiative provides a framework to overcome these obstacles.

Part of the benefits derived from the initiative is the growing synergy between the tourism and artisan foods industries. Many of the tourism operators have increasingly used Fuchsia Branded high quality food products as a value adding component.
Most importantly, but perhaps the least tangible benefit has been the nurturing of “destination thinking” in the region. Providing an integrated network of member enterprises allows synergy and collaboration contributes to the spirit of community amongst the members.

1.4 Swansea-Cork Ferry Service

A ferry service between Cork and the port of Swansea in Wales operated from 1987 to 2006. (BBC News 2007) It carried roughly three millions passengers during that period. In 2006 it sold its passenger ferry vessel, the MV Superferry, with the intention of replacing it. However, the purchase of a new vessel encountered complications and the service did not resume.

Figures published by West Cork Development Partnership (2007) show the impact from the loss of the Cork Swansea ferry service. The ferry ceased operations on 7th October 2006. It carried an average of 100,000 passengers and 30,000 cars annually from March to October. The Partnership estimated that the loss of this service cost the region €37 million a year.

As part of the campaign to reinstate the ferry service, the campaigners conducted an internet survey (included in Appendices) to determine the demand existing for a renewed ferry service between Cork and the UK. Although this was a simple survey with no correction for statistical errors, it did find a large majority in support for a new ferry service. Among its findings were that 60% of potential passengers would be travelling from the UK to Ireland. It also found that 56% of potential passenger would intend travelling to the south-west area of Ireland. A large proportion, roughly 78%, would make more than one crossing annually. The vast majority, at 86%, would travel with a vehicle.

As reported in the Irish Examiner (2009), the West Cork Tourism Co-operative purchased ‘The Julia’ from a Finnish financial institution to operate under the ‘Fastnet Line’ brand – a 100% owned subsidiary. The company received investment backing from Cork County Council of €200,000 as well as future assistance in marketing.

Passenger figures released by the Irish Maritime Development Office (2010) shows cross-channel passengers, who account for 90% of total traffic, passing through all ports in Ireland, rose 5% in the third quarter of 2010 from the same period in 2009. It also states that passenger numbers and regional distribution of visitors were boosted by the return of the
Cork Swansea service. A press release from Fastnet Line (2010) reports 80,000 passengers and 31,000 cars have travelled on the service since its reinstatement, exceeding targets. Consequently the firm has a revised target of 120,000 passengers for 2011. No research has of yet been performed to ascertain the impact on tourism operators in West Cork from the return of the ferry service.

1.5 Conclusion

As been shown from a review of the literature, the transport links are extremely important to the viability of the tourism industry in West Cork. As the service has only been resumed very recently, very little study has been performed on the impact this has had on the tourism operators and also for the passengers. This study will survey a cross section of tourism operators in the region to ascertain the impact of any on their businesses. For the purposes of this survey a sample area of the region will be chosen as a representative area of the whole. The region chosen within West Cork will be the area 3,4 and 5 regions as defined by West Cork Tourism, namely encompassing the areas including Bantry, Castletownbere, Schull, Baltimore and the Islands, Skibbereen, Union Hall, Glandore and Ross CSnbery.
METHODOLOGY

2.1 Introduction
In this section, divided into six sections, the reasons for the chosen research method, the sample group and procedure used in the survey are outlined and justified. It will also outline the limitations of the study and the ethical considerations involved.

2.2 Research Method
Research methods can broadly separated into two approaches – Qualitative and Quantitative. The qualitative method involves describing “kinds of characteristics of people and events without comparing events in terms of measurements or amounts.” (Thomas 2003). On the other hand, quantitative methods focus attention on “measurement and amounts (more or less, larger and smaller, often and seldom, similar and different) of the characteristics displayed by the people and events that the researcher studies.” (Thomas 2003). In order to obtain figures and statistics in the study, the author utilised questionnaire surveys. A survey provides a quantitative description of some cross-section of a population. This data enables the researcher to “generalize the findings from a sample of responses to a population.” (Creswell 1994:117). This was judged to be the most appropriate method in order to compare data obtained to data published in the various relevant sources.

Since the subject matter is quite recent and subsequently very little research has been done in the area at the regional level being examined in this study, it was felt that the quantitative method was best suited to the aim of this study, namely to research the impact on tourism operators in West Cork of the renewed Swansea-Cork passenger ferry service. Due to the financial impact on the tourism operators in the region, questionnaires were judged to be the most appropriate method to obtain the data whilst allowing the respondents to answer the questions openly and truthfully but also remain anonymous. One of the advantages in using the questionnaire method is that each respondent answers the same set of structured questions, making the data obtained more quantifiable. The questionnaire was designed to get information to answer the aims and objectives of the study.

2.3 Participants
The participants in the sample group consisted of businesses operating in the tourism and leisure industries within the Area 3, 4 and 5 sections of the West Cork region as defined by West Cork Tourism. This was done in a single stage sample. The businesses surveyed were chosen at random among tourism and leisure operators in the area. The businesses were stratified so that specific characteristics were represented, in order to better represent the overall business climate. The businesses were stratified in terms of the business focus, i.e. accommodation, activity provider, food and beverage establishments etc. The group surveyed consisted of twenty businesses. A survey is a systematic method for gathering information from a sample group of “entities for the purpose of constructing quantitative descriptors of the attributes of the larger population of which the entities are members.” (Groves, Fowler et al, 2009:2)

2.4 Procedure
Before submitting the questionnaire to the respondents a “pre-test” was given to a small number of unbiased test respondents “in order to test the procedures and quality of responses” (Walliman, 2008:436) and ‘to anticipate any problems with comprehension or any other sources of confusion’ (Walliman, 2008:282). Some adjustments were then made to improve the ease of understanding of some of the questions and to the format of the document.

2.5 Ethical Considerations
Due to the financial nature of many of the questions and to guard ongoing business interests for the respondents, they were informed that all information submitted would be used in the utmost confidentiality and that the respondents were free to withdraw from the survey at any stage. The respondents were also assured that although findings would be presented in the study, none of the raw data would be published in any form and original questionnaire forms would be destroyed once the information was collated. All participation in the survey was completely voluntary and all respondents were informed of the purpose of the survey.

2.5 Limitations
The sample group in the survey was limited to twenty. As such, this may have an impact on the results being a realistic representation of the region as a whole. To counteract this, a smaller sample area within the region was chosen to increase the accuracy of any findings. There may also have been issues with respondents completing the questionnaire with inaccurate financial figures and estimates. This survey can never be a completely accurate
reflection of the figures but more importantly it gives an insight into the “perception” of the situation from the viewpoint of the tourism operators themselves.

2.6 Method of Analysis
The results of the quantitative research are presented graphically in the form of charts and graphs, for ease of viewing purposes. The data is also compared and contrasted to data available from other sources.
RESULTS

3.0 Introduction
The following section sets out the findings of the twenty answered questionnaires which were distributed amongst tourism operators in areas 3, 4 and 5 of the West Cork region as defined by West Cork Tourism.

45% (11) of the businesses which completed the survey were members of the West Cork Tourism Co-operative, whilst 55% (9) were not. 80% (16) of the businesses were accommodation providers, 25% (5) were food and beverage operators, 20% (4) were activity/adventure providers and 5% (1) described themselves under “other” category. Some of the businesses had more than one area of business, accounting for the overlapping percentages.

3.1 Objective 1: To identify any impact on the tourism operators from the cessation and resumption of the Cork Swansea ferry service.

Q1. Before the cancellation of the Swansea-Cork Ferry in 2006, what percentage (approximately) of your business came from overseas tourists?

![Percentage of business from overseas tourists before cancellation of ferry service.](image)
25% of respondents said that 0-20% of their business before the loss of the ferry service came from overseas tourists, 35% said it was 20-40%, 15% had 40-60%, 20% said 60-80% and 5% of businesses had 80-100%.

**Q2. During the period when the ferry was not operating, what percentage (approximately) of your business came from overseas tourists?**

![Bar chart showing the percentage of businesses from overseas tourists during the period without a ferry service.]

During the period without a ferry service, 55% of businesses had 0-20% of their business from overseas tourists, 15% had 20-40%, 25% had 40-60% and 5% had 80-100% from overseas tourists.

**Q3. Did the loss of the Swansea-Cork ferry service impact your business generally?**

Respondents answered as follows:
- Positively: 10%
- Negatively: 70%
- No impact: 20%

**Q4. Was there a noticeable difference in the number of tourists from overseas?**
Respondents answered as follows:
Yes  80%
No  20%

Q5. Was there a noticeable difference in the number of tourists travelling with their own vehicles?

Respondents answered as follows:
Less  85%
More  0%
No Difference 15%

Q6. In your experience did tourists stay longer or not as long in the area during the period with no ferry service?

Respondents answered as follows:
Stayed Longer  0%
Did not stay as long  60%
No Change  40%

Q7. Did the loss of the Swansea-Cork ferry service in 2006 impact the business financially?

Respondents answered as follows:
Yes  75%
No  25%

...If YES please ESTIMATE the financial loss as a rough percentage:
Of those who reported a financial impact from the loss of the ferry service, 50% of respondents reported a financial impact of between 0-20% and 25% reported an impact of between 20-40%.

**Q8. Did your business make adjustments to staffing levels due directly to the loss of the ferry service in 2006-2009?**

Respondents answered as follows:
- Reduction in staff: 25%
- Increase in staff: 0%
- No change: 75%

**Q9. Has your business experienced improved business from overseas tourist since the return of the ferry service?**
40% of respondents reported no change in business levels since the return of the ferry service, 15% reported deterioration, whilst 45% reported some improvement.

Q10. In your opinion, has this change been directly related to the ferry service resuming?
30% said that, in their opinion, this was not related to the return of the ferry service. 25% said it was related and 45% said it was impossible for them to say with certainty either way.

**Q11. Have you noticed an increase in overseas tourists travelling with their own vehicle?**

Respondents answered as follows:
- Increase:  50%
- Decrease:  0%
- No Change:  50%

**Q12. In your experience has the length of stay of overseas tourists changed?**

![Fig. 3.1.12 Change in length of stay of overseas tourists.](image)

20% of respondents said that overseas tourists are not staying as long as previously, 45% said there was no change and 35% thought that overseas tourists were staying longer.

**Q13. Did the return of the Swansea-Cork ferry service in 2010 impact the business financially?**

Respondents answered as follows:
Yes: 75%
No: 25%

...if YES, please provide an ESTIMATED percentage:

Of those who experienced a financial impact after the resumption of the ferry service, 30% estimated it at around 0-20% and 5% said it was between 20-40%.

Q14. In your opinion has the return of the ferry service been beneficial to your business during the economic recession?
15% of respondents said that the ferry service was of no benefit to them during the recent economic recession, 50% said it was beneficial and 35% could not say with certainty.

3.2  **Objective 2: To isolate the changing travel patterns of overseas tourists from the ferry situation.**

Q15. Respondents were asked to say whether they strongly agreed, agreed, didn’t know, disagreed or strongly disagreed with the following statements:

“*Having a passenger ferry service from the UK to Cork is good for tourism in West Cork.*”
"The growth of low-cost airlines such as Ryanair has made a difference to tourists’ length of stay."

"The difficulties in the West Cork tourism industry during the 2006-2009 were due to the global recession."

Fig. 3.2.1 “Having a passenger ferry service from the UK to Cork is good for tourism in West Cork.”

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</tr>
<tr>
<td>Disagree</td>
<td>0%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>5%</td>
</tr>
<tr>
<td>Agree</td>
<td>30%</td>
</tr>
<tr>
<td>Strongly Agree</td>
<td>65%</td>
</tr>
</tbody>
</table>

Fig. 3.2.2 “The growth of low-cost airlines such as Ryanair has made a difference to tourists’ length of stay.”

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Strongly Disagree</td>
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</tr>
<tr>
<td>Disagree</td>
<td>0%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>15%</td>
</tr>
<tr>
<td>Agree</td>
<td>35%</td>
</tr>
<tr>
<td>Strongly Agree</td>
<td>50%</td>
</tr>
</tbody>
</table>
The difficulties in the West Cork tourism industry during 2006-2009 were due to the lack of a passenger ferry service.

It is an advantage to your business if tourists are able to bring their own vehicle.
“The strength of the British Pound Sterling against the Euro has been the most important factor in British tourists choosing to visit West Cork.”

“Visitors to West Cork perceive the region to be expensive.”
“In your estimation/experience, visitors travelling by ferry stay longer on average in West Cork.”

“Having more flights into Cork Airport is more important to your business than having a passenger ferry service.”
“In your experience, you lost business DIRECTLY because of the loss of the ferry service during 2006-2009.”

Q16. Are there any other factors that you think have strongly impacted on tourism in West Cork since 2006 that have not been covered above?
• “The Collapse of the Irish Economy, as West Cork Tourists are approx 60%-70% Irish.”

• “the recession in my opinion has been the main factor. the return of the cork ferry made little or no difference to our business as the few that used it said they would have used Rosslare on their way to stay with us.”

• “The greatest impact on tourism has been from the recession & banking problems in Ireland.”

• “The weather has been a major factor over the last 3 years people are going abroad because a) it's cheaper b) they have better facilities for families. West Cork needs some major facilities that can be used in bad weather.”

• “There seems to be a distinct or very noticeable difference in the amount of marketing aimed towards bringing visitors to West Cork versus Dublin or Kerry.

Furthermore, the fares that Swansea - Cork ferry charge both recently and prior to their withdrawal from service are extortionate by comparison to that of the Rosslare routes - We feel that the fares would impact a UK customers route/destination quite significantly, especially during these difficult financial times.

People (both consumers and business owners/operators) are becoming increasingly aware that the Irish economy as a whole is one of the most expensive in Europe with higher than average:

Labour Costs
Rates
Produce & Stock
Taxes

Therefore, it stand to reason that we're not in any way competitive for the average family who could jet off to the Med and get guaranteed weather most of the year for a fraction of the price of a week long stay in Ireland.”

• “Expensive poor quality restaurants. There are some nice restaurants but there are many mediocre ones with way too expensive food.”

• “To many unapproved B&B.”

• “No I think your study is very comprehensive. I own a holiday home which I
rent out but have had very few British staying so the ferry has had no real impact to date but I certainly did notice far more British cars in West Cork last Summer. Spoke to owners of a Caravan Park in West Cork within the last month. They had asked all English visitors if they had used the ferry and those that had almost all had a negative view of the ferry from too expensive to dissatisfaction with services on board.”

- “Lack of support from Cork/Kerry Tourism who promote Cork City and Killarney and seem to think that WEST Cork starts and stops with Kinsale.”

### 3.3 Conclusion

In conclusion, most of the results were as to be expected although some surprising results were raised. These will be examined in the discussion segment next.
DISCUSSION

4.0 Introduction

This section examines the findings produced from the survey and discusses their implications.

4.1 Objective 1: To identify any impact on the tourism operators from the cessation and resumption of the Cork Swansea ferry service.

The tourism operators surveyed were all located within the areas 3, 4 and 5 as defined by West Cork Tourism. This was chosen as a well defined area that could provide indicators for the West Cork region as a whole. 80% of the operators were involved in providing accommodation and 25% were involved in food and beverage operations. There was somewhat of an overlap from these two areas from businesses such as restaurants and bars also providing accommodation.

45% of the businesses surveyed were members of the West Cork Tourism Co-operative. It was important to ascertain this figure as the West Cork Tourism Co-operative was partly responsible for the campaign to bring the ferry service back into operation and so these businesses would likely be more aware of figures arising related to the ferry and may be slightly biased in relation to the ferry service.

Prior to the cancellation of the ferry service in 2006, 25% of the businesses reported that 0-20% of their business came from overseas tourist, 35% reported 20-40%, 15% reported 40-60%, 20% reported 60-80% and 5% reported 80-100%. This compares with the figure of 22% reported by West Cork Development Partnership for 2006. During the period without the ferry service, 55% of respondents reported that 0-20% of their business came from overseas tourists. The figures show quite a substantial drop in the percentage of business coming from overseas tourists. Whether this drop is completely due to the cessation of the ferry service, or was more influenced by the global recession and change in travel patterns will be examined more closely later.

What is clear is that the perception among West Cork tourism operators was that the loss of the ferry service had impacted their business at 70% reporting a negative impact.
Interestingly, 10% reported that it had had a positive impact, though this may have been due to arguably confusing language in the question. It is debatable whether the respondents intended to say that there was certainly/positively an impact on the business. 20% of respondents reported no impact whatsoever. The previous questions figures are further supported by 80% of respondents saying they had noticed a difference in the number of tourists from overseas.

The next two questions seem to support the idea that the loss of the ferry service affected the number of tourists travelling with their own vehicles and consequently staying for longer periods of time as described by Dickinson & Robinson (2008) and in the literature review. 85% reported a noticeable difference in the number of tourists travelling with their own vehicles, while 60% said that in their own experience, tourists were not staying as long in one area during the period with no ferry.

In order to ascertain the economic impact on the tourism industry in West Cork, the surveyed tourism operators were asked whether the loss of the ferry service had had a financial impact. Three quarters of those surveyed reported that it had had a financial impact on their business with half placing the impact at 0-20% and a further quarter saying it was between 20-40%. However, 75% of the businesses had made no change in staffing levels due to the loss of the ferry service, with 25% making a reduction in staff. Importantly, no business surveyed had increased their staffing level – indicating a certain lack of growth in the industry.

The second aim of this segment was to try and measure any economic impact, if any, from the return of the ferry service during the 2010 season. 45% of operators reported that business levels had improved, 40% saying there was no change and 15% reporting a further deterioration in their business levels. The levels reported do not seem to be close to offsetting the loss of business reported during the loss of the ferry service. This raises the question of how much the drop in business was related to the loss of the ferry service and how much was related to the collapse of the Irish economy and the global recession. The respondents were asked whether any improvement in their business was, in their opinion, directly related to the resumption of the ferry. Only 25% were attributing it to the ferry service, 30% thought that it was not related and understandably 45% felt they could not say with certainty. Opinion was divided on whether there was any noticeable increase in overseas tourists travelling with their own vehicle with half saying there was an increase and
half saying there was no change. It does seem that a further drop in numbers has been avoided however, since no operator reported a decrease in the numbers travelling with their own vehicles.

This is carried on in the answers to the question of whether there was any difference in the length of stay of the overseas tourists. 35% estimated that they were staying longer, 45% thought there was no change and 20% felt that tourists were, in fact, not staying as long.

Perhaps most importantly, 75% felt that the return of the ferry service had had a financial impact on their business while 25% said it had not. Of the respondents who reported a financial impact, most put it at 0-20% and a minority put it at 20-40%. Clearly this does not come close to the financial loss reported in the earlier questions.

Finally, the respondents were questioned directly on whether they thought the ferry service was of benefit to them during the economic recession. Half said it was beneficial, 15% said it was of no benefit and 35% said they could not say for certain. Since the service has only been resumed for one season so far, it may be too early for these businesses to tell whether it is of any benefit to them.

4.2 Objective 2: To isolate the changing travel patterns of overseas tourist from the ferry situation.

In order to gauge how much of the impact on the West Cork tourism industry had been due to the lack of the ferry service from 2006-2009, and how much was due to changing travel patterns among overseas tourist as described in the literature review. The respondents were given a series of statements related this issue and asked to say whether they strongly agreed, agreed, didn’t know, disagreed or strongly disagreed.

- “Having a passenger ferry service from the UK to Cork is good for tourism in West Cork.”

With 65% strongly agreeing and a further 30% agreeing with this statement, it is clear that the tourism operators in West Cork regard having a passenger ferry service link to the UK as an advantage. No respondent disagreed with this statement.
“The growth of low-cost airlines such as Ryanair has made a difference to tourists’ length of stay.”

This question attempted to ascertain the extent to which changing tourism travel patterns can be attributed to the growth in low-cost airlines serving Irish airports such as Cork Airport. Quite clearly, many of the respondents felt that it was a major factor, with 50% strongly agreeing and 35% agreeing. Again no respondent disagreed with this statement, although 15% did state that they couldn’t say either way.

“The difficulties in the West Cork tourism industry during the 2006-2009 were due to the global recession.”

This question attempted to distinguish any difficulties experienced during the period 2006-2009 between the ferry situation and the global recession. 65% of respondents strongly agreed and 30% agreed. No respondents disagreed with this statement. This seems to suggest that the tourism operators in West Cork felt that the global recession may have been influenced to a greater extent by the recession than by the situation with the ferry.

“The difficulties in the West Cork tourism industry during 2006-2009 were due to the lack of a passenger ferry service.”

Carrying on from the previous statement, this statement focused on the ferry situation. This revealed that many of the tourism operators did not feel that the difficulties experienced by the West Cork tourism industry were due to the ferry situation. Whilst 45% agreed, 20% either strongly disagreed or disagreed and 35% could not say. Taking this in combination with the previous statement, it would suggest that the operators feel the global recession was a more important factor than the loss of the ferry.

“It is an advantage to your business if tourists are able to bring their own vehicle.”

Notwithstanding the operators suggested feelings that the global recession was a bigger factor than the ferry situation, all of those surveyed either strongly agreed or agreed that it was an advantage to their business for tourists to be able to bring their own vehicle. This reflects
somewhat the poor state of transport infrastructure in the region and distances involved in travelling to many of the destinations.

- “The strength of the British Pound Sterling against the Euro has been the most important factor in British tourists choosing to visit West Cork.”

This statement attempted to gauge how much of the difficulties experienced could be attributed to the relative strengths of the Euro and British Pound Sterling against each other as a factor in British tourists choosing West Cork as a holiday destination. This was clearly an important factor to the tourism operators and one which was not hugely considered previous to the survey. All of the businesses surveyed agreed or strongly agreed that has been a factor.

- “Visitors to West Cork perceive the region to be expensive.”

This statement was an attempt to see the tourism operators’ view of their own industry as experienced from their interactions with overseas tourists. 25% strongly agreed and 65% agreed that visitors perceived the region to be expensive. Interestingly 10% disagreed. This topic arose in more detail in some of the comments of the respondents in the last question.

- “In your estimation/experience, visitors travelling by ferry stay longer on average in West Cork.”

This question tried to see if tourism operators felt that tourists travelling with their own vehicles by ferry stayed longer on average as suggested by some of the studies covered in the literature review. The majority of those surveyed agreed with this statement, at 80%. This would seem to correlate with the large majority of the respondents agreeing that the ferry was a benefit to tourism in West Cork.

- “Having more flights into Cork Airport is more important to your business than having a passenger ferry service.”

Again, this was an attempt to gauge, from the tourism operators experience, whether the passenger ferry service was still important to the tourism industry in West Cork or whether
times had changed and tourist arriving by air transport and staying shorter lengths of time were more important. Opinion was slightly divided on this issue. 35% felt strongly that it was more important, 30% agreed. 35% however either disagreed or felt they could not say with certainty. This may be a difficult issue for the operators to quantify with any sureness or may become clearer over the next few seasons when the ferry becomes established.

“"In your experience, you lost business DIRECTLY because of the loss of the ferry service during 2006-2009.""

Finally, in this segment, this was an attempt to pin down the importance of the loss of the ferry to the tourism operators by specifically linking the loss of the ferry service and any loss of business. With 45% saying they had lost business directly and 35% feeling they couldn’t say, while not disagreeing at the same time, this would suggest that many had lost business directly. 20% disagreed.

Overall the objective of isolating the ferry situation from changing travel patterns was achieved. The results suggest that a large proportion of the respondents feel that, while the ferry is important to the industry, there are other more important issues such as the global recession, currency fluctuations and perception of the region as being expensive.

4.3 Issues raised by those surveyed not covered above

Respondents to the survey were given the opportunity to raise any issues that they felt were important. Most common of these were that the recession had been a more factor than the loss of the ferry service (although this was not as pronounced in the results of the survey). Another issue raised was lack of infrastructure and facilities in the region. A couple of respondents stated that they had issues or had heard of issues with the operation of the new ferry service in relation to pricing structures and dissatisfaction with services on board. Although this could be discounted as personal views, perception of any service is important to its uptake.

4.4 Evaluation of Method
The basic approach taken to gathering the information was successful. Also, the design of the questionnaire proved successful in obtaining the information which was felt important in order to adequately study the issue. The use of questionnaires was most appropriate in gathering information while allowing the respondents to remain anonymous and disclose information related to their business.

4.5 Limitations of Method

Some of the limitations of the method related to interpretation of the questions. This was not always guaranteed to be accurate. The sample size was also quite small, at twenty, although it must be stated that it proved quite difficult to obtain even this number. The biggest factor was the distance involved between the author and the businesses involved.
CONCLUSION

Overall the study raised a number of issues. One of the issues raised was the effect of the global economic recession as a factor in many of the respondent businesses. It was difficult for many of the businesses surveyed to separate any decline in their business between economic factors in the Irish and global economies, and the loss of the passenger ferry service.

Nonetheless, the perception amongst a sizeable section of the respondents is that the loss of the passenger ferry service was a negative factor for their businesses, resulting in a negative financial impact and impacting on the length of time visitors stay in one area.

One important point raised from the study was that many of the businesses thought that there had been an impact on tourist behavior in terms of length of stay from low-cost airlines such as Ryanair and that the number of flights into airports such as Cork Airport was just as important to their business as having a passenger ferry service connecting Cork to the United Kingdom.

There is certainly scope for further research in this area, especially since there are increased moves towards co-ordination amongst West Cork Tourism operators such as the Fuchsia Brand, the West Cork Tourism Partnership and the West Cork Tourism Co-operative.
RECOMMENDATIONS

Based on the results of this study there is a need to increase co-ordination and co-operation amongst tourism operators in West Cork.

- Further co-operation between tourism operators can help to further offset the negative effects of the peripheral location of the region.
- Greater investment is needed from central government as the region is somewhat neglected in comparison to tourism marketing for the nearby Kerry region.
- The perception of the region as being expensive needs to be dealt with.
- The issue of unapproved Bed and Breakfasts needs to be examined.
REFERENCES


Shephard, E. (2005), *Cork, Bandon and South Coast Railway*, Hinckley, UK: Midland Publishing


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Shephard, E. (2005), *Cork, Bandon and South Coast Railway*, Hinckley, UK: Midland Publishing


APPENDICES

THE IMPACT ON TOURISM IN WEST CORK FROM THE REINSTATED CORK-SWANSEA PASSENGER FERRY

Town/Village: _______________________________

Year business established: _______________________________

Industry that business specialises in:

- Accommodation
- Tourism/Heritage
- Food & Beverage
- Leisure/Entertainment
- Other

Please indicate your answer by ticking **one box per question**...

**Objective: To ascertain the impact on tourism businesses of the loss of the ferry service**

**IMPACT FROM THE LOSS OF THE FERRY SERVICE...**

1. Before the cancellation of the Swansea-Cork Ferry in 2006, what percentage approximately came from overseas tourists?
   - 0-20% ❑
   - 20-40% ❑
   - 40-60% ❑
   - 60-80% ❑
   - 80-100% ❑

2. During the period without a ferry service, what percentage approximately came from tourists?
   - 0-20% ❑
   - 20-40% ❑
   - 40-60% ❑
   - 60-80% ❑
   - 80-100% ❑

3. Did the loss of the Swansea-Cork ferry service impact your business generally?
   - Positively ❑
   - Negatively ❑
   - No impact ❑

4. Was there a noticeable difference in the number of tourists from overseas?
   - Yes ❑
   - No ❑

5. Was there a noticeable difference in the number of tourists travelling with their own vehicle?
   - Less ❑
   - More ❑
   - No difference ❑
6. In your experience did tourists spend more or less time in the area during the period with no ferry service?
   - Stayed longer □
   - Did not stay as long □
   - No change □

7. Did the loss of the Swansea-Cork ferry service in 2006 impact the business financially?
   - Yes □
   - No □
   - If yes, please estimate the financial loss as a rough percentage:
     - 0-20% □
     - 20-40% □
     - 40-60% □
     - 60-80% □
     - 80-100% □

8. Did your business make adjustments to staffing levels due directly to the loss of the ferry service?
   - Reduction in staff □
   - Increase in staff □
   - No change □

**Objective: To ascertain the impact of the return of the ferry service**

**IMPACT OF THE RETURN OF THE FERRY SERVICE...**

9. Has your business experienced improved business from overseas tourists since the return of the ferry service?
   - Improved □
   - Deteriorated □
   - No change □

10. In your opinion has this change been directly related to the ferry service resuming?
    - Yes □
    - No □
    - Impossible to say with certainty □

11. Have you noticed an increase in overseas tourists travelling with their own vehicle?
    - Increase □
    - Decrease □
    - No change □

12. In your experience has the length of stay of overseas tourists changed?
    - Staying longer □
    - Not staying as long □
    - No change □

13. Did the return of the Swansea-Cork ferry service in 2010 impact the business financially?
    - Yes □
    - No □
    - If yes, please provide an estimated percentage:
      - 0-20% □
      - 20-40% □
      - 40-60% □
      - 60-80% □
      - 80-100% □
14. In your opinion has the return of the ferry service been beneficial to your business during the economic recession?

Beneficial □  No Benefit □  Can’t say for certain □

Objective: to try and isolate the changing travel patterns of overseas tourists from the ferry situation

CHANGING TRAVEL PATTERNS OF OVERSEAS TOURISTS...

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Don’t know</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
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<td>□</td>
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<td>The growth of low-cost airlines such as Ryanair has made a difference to tourists length of stay</td>
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<td>The difficulties in the West Cork tourism industry during 2006-2009 were due to the global recession</td>
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<tr>
<td>It is an advantage to your business if tourists are able to bring their own vehicle</td>
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<td>The strength of the British Pound Sterling against the Euro has been the most important factor in British tourists choosing to visit West Cork</td>
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<td>Visitors to West Cork perceive the region to be expensive</td>
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<td>In your estimation/experience, visitors travelling by ferry stay longer on average in West Cork</td>
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<td>Having more flights into Cork Airport is more important to your business than having a passenger ferry service</td>
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</tbody>
</table>
In your experience, you lost business DIRECTLY because of the loss of the ferry service during 2006-2009.

15. Are there any other factors that you think have strongly impacted on tourism in West Cork since 2006 that have not been covered above?

_____________________________________________________________________

_____________________________________________________________________

_____________________________________________________________________

_____________________________________________________________________

_____________________________________________________________________
Dear Name,

I am final year student from West Cork studying in Athlone Institute of Technology studying Tourism and Hospitality Management. I am conducting a study examining the impact from the loss and reinstatement of the Swansea-Cork ferry service on the tourism industry in West Cork.

I enclose a brief questionnaire containing questions concerning the effect the ferry service has had, if any, on your business. I would greatly appreciate it if you could find the time to fill it in.

Participation is completely voluntary and all information provided is confidential. Although the information will be collected into statistics, the original information will not be seen by any other party except me. All completed forms will be destroyed after the information has been collated. You are of course free to withdraw at any stage after you have returned the form.

If you have any further questions regarding any aspect, please do not hesitate to contact me.

Kind regards,

Eoin Moynihan