THE MARKETING OF TOURISM SERVICES IN IRELAND
AS REPRESENTED BY
THE HOTEL AND CATERING INDUSTRIES

Thesis Submitted for the Award of

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by

Malcolm Mitchell

Supervisor:Professor Peter Chisnall

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DECLARATION

I hereby certify that this material,which I now submit for assessment on the programme of study leading to the award of M.B.S.is entirely my own work and has not been taken from the work of others save and to the extent that such work has been cited and acknowledged within the text of my work.

Signed..M.Mitchell...................Date...19th July 1993...........

Declaration

The present thesis 'The marketing of tourism services in Ireland as represented by the hotel and catering industries',is based on the work undertaken by Malcolm Mitchell,post-graduate student at the Dublin Business School,Dublin City University,during the period September 1989 - September 1993. The research was carried out under the supervision of Professor Peter Chisnall,Head of Management Division,Dublin Business School,Dublin City University.

M. Mitchell

Signature of Research Student

Signature of Supervisor

TO MAUREEN

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A SPECIAL ACKNOWLEDGEMENT

In this project I would like to acknowledge the liberty that I have taken in referring regularly to the work of Prof P.M.Chisnall and in particular his text;Marketing: A Behavioural Analysis,2nd Edition,1985.McGraw Hill.
I have pleasure in stressing the importance of his works and the deference due to him for his support,and kindly ask his indulgence.

THESIS OUTLINE

This thesis is divided into four main sections.

The first focuses on the type and nature of services in the context of services marketing, along with the process of service and presents some conceptual frameworks by which services may be identified. It looks at the development of the service economy and the historical background to the service industry in Ireland in particular.

Consumerism is referred to in response to marketing activities where there is cultural and social change-especially the growing responsibilities of marketers in the face of consumer sovereignty.

In order to satisfy consumer expectations and maximise marketing effort, there is the need for interdependence of marketing activities. Emphasis is maintained on the concept of client-server interface and the management of the service transaction.

The aspect of consumer decision making from a problem solving approach is developed,from the basic black-box,to considering a number of more complex logical or process-flow models,in an attempt to explain consumer rationale for choice.

The second section returns to the theme of services in Ireland,but is developed from a tourism perspective, concentrating on the present structure of the industry, and developing the theme of the importance of tourism to the Irish economy - in particular as a major revenue earner and employer.The industry is broadly covered,highlighting the main sectors of which it is composed.

The third section outlines the area of research surveys in general and the format which was used with this project,including rationale and main methodology.

The fourth and final section covers the research proper and details of the findings,along with some tentative comments where thought appropriate.

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ABSTRACT

The vulnerability of Irish business stems from their tendency to rely on single products or market characteristics for success, instead of developing a comprehensive marketing strategy. Desk research was undertaken in order to develop a better understanding of services marketing and create a background of the tourism industry.
The nature of services was identified, as well as the processof the development of Irish services, along with the increasing dependence on services for employment. The influence of consumerism and decision-making was also studied.
Primary research focuses on the Hotel and Catering industry, with specific reference to the ways these two segments pursue their marketing strategies.
It was found that the majority of problems confronting the two are as a result of the scale of operations vis.a highly fragmented industry which suffers from the lack of professional marketing skills. The main trade and professional associations do not appear to be meeting the needs of the typical small firms in hotel and catering in Dublin. It appears that the existing organisations have failed to fill this gap and it is recommended that a special initiative should be made to provide small firms in the hotel and catering industry with relevant professional marketing expertise.

THE MARKETING OF TOURISM SERVICES IN IRELAND AS REPRESENTED BY THE HOTEL AND CATERING INDUSTRIES

INTRODUCTION

Services of all types are taking an increasing part of both organisational and personal budgets.Strategies and tactics in the marketing services are being applied in many different ways from those typically applied to products (Wilson 1972.1).

The array of services is a bewildering jumble of size and activities even to the extent as arising as the result of a sideline of manufacturing industry (Westing & Albaum 1975.6). But what constitutes a service market? Cooke describes it as " a set of human wants sufficiently homogeneous that they may be satisfied by a defined service offer" (Cooke 1972.2). In addition to services are means not ends in themselves.

It is recognised that services marketing has its own unique set of requirements and marketing opportunity has been enhanced by regulatory change in certain professions (medicine;law;accounting) as well as the increase in expenditure in services generally.(Upah & Upah 1983.3).

Services marketing has been neglected for many reasons. The organisations are small lacking in management expertise whilst professional codes of practice have been antagonistic to the idea of marketing - considering it to be unprofessional or even unethical.(George & Barksdale 1974.4). Such an approach indicating the lack of what actually constitutes marketing in effect however indications of change of attitude are illustrated by Airlines and Banking - the latter which moved from hostility to aggressive marketing relatively quickly. (Carroll 1970.5). From the outset of services marketing it was recognised that service companies did not have a marketing approach resulting in a failure to recognise or react to marketing problems or to coordinate service marketing activities.(Johnson 1964.7). More recently it has been suggested that service firms are more likely to lack a marketing department to perform analysis;consult specialist marketing agencies;plan;train;research or finance marketing activities.(Cowell 1984.8).

As will be seen the Irish service industry (represented especially by Hotels and Catering),is singular in the size of its individual companies. Many if not all marketing activities are likely to be performed by one individual who may have some specialist training but whose main responsibilities lie in a different area to marketing.

The foregoing may appear as a series of excuses rather than legitimate reasons or explanations for service companies who failed to adopt a marketing approach.(Dornstein 1977.9;Houston & Homans 1977.10;Hovell 1969.11). However deregulation,the growth of D.I.Y.,the rising costs of services and the growth of service professionals will significantly increase the use of marketing by service firms.(Evans & Berman 1987.12). Studies which illustrate this growth are given in Banking(Stall 1978.13);the Canadian Postal Service (Barnhill 1974.14);Utilities in the U.S. (Warshaw 1962.15);and the Public Provision of Recreation and Leisure Services (Cowell 1979.16);Accounting services (Kotler & Connor 1977.17);Professional Services in General (Wilson 1972 1);Banking Services (Berry 1975.18;Rathmell 1974.19;Shostack 1977.20);Retail Services in General(Judd 1964.21;George 1977.22;Upah 1980.23);Transportation (Voughn et al 1979.24) and the Performing Arts (Currim et al 1981.25).

Problems common to the service market have been addressed by Sasser (1976.26),and Lovelock and Young (1977.27) regarding supply and demand. Levitt (1977.28;1976.29) discusses productivity while Sasser and Arbeit(1976.30) discuss structure and mechanisation of service tasks. Production economies of multisite operations are addressed by Chase (1978.31) and Upah (1980.23) and Distribution channels by Donnelly (1976.32) and Stern and El-Ansory (1972.33).

In addition to the accepted public areas of health care education and government, the topic of services also involves such areas as finance personal and professional services.(Pride & Ferrell 1989.34). Traditional approaches to marketing have little to offer the services sector (Gronroos 1980.35),but the marketing concept is becoming increasingly appropriate for services (Watson 1982.36;Garret 1980.37;Waterworth 1973.38;Bellardo & Waldort 1977.39)..While implementation of the marketing concept has been documented by Kotler (1982.40);Bochner & Khosla (1981.41),Mahon(1978.42),and Wahab et al (1976.43).

SUMMARY

Services are becoming more prevalent at both industry and consumer levels. Service marketers lean heavily on the established principles of product marketing possibly making instinctive rather than conscious allowance for the particular problems arising out of marketing a service.

In order to be able to apply the principles of marketing obviously the right set of conditions must exist. In particular the company must accept and implement its own marketing philosophy - possibly a function of the size and type of organisation.

The 'unique'requirements for the marketing of services may be many and varied. This is as a result of the great variety of services that exists. There is also the complication of the operating traditions that are laid down by certain services - particularly professional services. These traditions are likely to not only to have been 'institutionalised but also assumed to apply to the service by the consuming public. This may be manifested as a certain business ethic - real or apparent rather than depending on or based on the requirements of skill finance or competition.

Changing market demographics culture technology and environmental and political will have conspired to create the necessity for a marketing re-appraisal on the part of service marketers in particular to define more
closely the specific principles which would determine successful marketing of their own particular service.

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NATURE AND TYPES OF SERVICES

"Spending in services continues to increase while still service definitions remain imprecise".(Chisnall 1985.1). Service has been identified as a transformation operation with inputs and outputs (Lovelock 1979.2). On the other hand Christopher et al (1980 3);consider the matching of organisational resources with customer wants while Levitt (1977.4) looked at the companys ability to win and hold customers.

The four P's presented by McCarthy (1968.5) as originally compiled by Borden (1965.5) implied that the profit nature was paramount. Comparing the performance of services e.g. health;education etc(Cowell 1984.7), Boom and Bitner extended this list to include seven P's; product;place;promotion;price;physical evidence;process and people.(Boom & Bitner 1981.8)

The specific mix adopted will vary depending on organisation and market dynamics.Either way the service will be sold as the core of the companys market offering (Shostack 1977.9;Gronroos 1978.12) and that as a result various systems of men,materials,capitol,equipment,information and money will be set to accomplish some identifiable set of objectives (Vollman 1973.10),both in non-profit and for-profit marketing (Pride & Ferrell 1989.11).

The service package consists of physical resources,materials used,standards of performance and benefits derived all of which are experienced by the consumer and give rise to varying degrees of satisfaction/dissatisfaction. The difficulties arise where the service element tends towards the 'pure' or to dominate the service-product mix.(Uhl & Upah 1983.13).

The boundary between goods and services is still difficult to draw.(Fuchs 1965.14). An early approach was to look at the special market conditions demanded by services. (Eiglier & Langeard 1977.15;Judd 1964.16;Rathmell 1974.17;Uhl & Upah 1978.18). Many assumptions previously held as to services were variously criticised (Bonoma & Mills 1979.19;Wyckham et al 1975.20;Sheth & Garret 1986.21). To argue differences between products and services was considered unproductive (Ryans & Willink 1977.22),rather it would be better to consider the problem from the point of view of a strategic planning model.(Uhl & Upah 1983.13).

DEFINITION

"Services are those separately indefinable essentially intangible activities which provide want satisfaction and that are not necessarily tied to the sale of a product or another service"(Cowell 1984.24). To produce a service may or may not require the use of tangible goods. However where such a use is required,there is no transfer of title (personal ownership) to those tangible goods.(Stanton 1981.25).

This concept of intangibility is centred upon by a number of authors;(Kotler 1982.26;Levitt 1981.27;Ziethaml 1981.31);while Christopher (1980.28) considers services as producing a series of benefits which cannot be stored.

Wilsons definition ignored the concept of tangibility totally (Wilson 1972.29) while Shostack (1982.32) was critical of this emphasis on tangibility,attributing it as the reason why so many services go awry. Bateson (179.33) cited the concept of intangibility as the 'difficulty consumers may have in understanding the service offerings' and who considered tangibility to be the critical characteristic distinguishing products from services.
(Bateson 1977 34). Specifically services cannot be touched,standardised,owned,patented, separately identified from production,inventoried or be considered exclusive from middlemen (where applicable) or consumer.An attempt to overcome intangibility was to focus on tangible clues i.e.specifying previous jobs undertaken,the service given and benefits obtained (Hardy & Davis 1983.35).
It is the benefits of the product not its features which is the focus of marketing (Enis & Roering 1981.36;Brookes 1988.39),but the direct,positive influence of intangibility on customers,product benefits and marketing practices cannot be underestimated (Rushton & Carson 1989.37),as well as being a possible negative contributor (George 1977.38).

The need to emphasise tangibility in its various aspects has been well documented,namely Advertising (Shrimp & Dyer 1978.40;Shostack 1977.9;Smith & Myer 1980.41);Physical Surroundings (Berry 1975.42;Eiglier & Langeard 1977.15;Shostack 1977.9);the Importance of Public Contact Personnel (Berry 1975.42;George 1977.38;Sasser & Arbeit 1976.40). The areas of advertising and promotion are particularly highlighted (Bloom 1977.44;Shrimp & Dyer 1978.40;Smith & Meyer 1980.41;Uhl & Upah 1983.13).

PERISHABILITY

"Services perish generally at the very instance of their performance" (Cowell 1984.7) In services marketing,close coordination of production capacity with market demand is required to offset problems caused by the inability to store services (Sasser 1976 45.). To compensate for perishability,service capacity can be adjusted according to variable demand,but it cannot be recalled for future use (Kotler 1986.46).

TRANSPORTATION OF SERVICES

Most services cannot be produced in one place and then transported to another. Either the consumer must go to the production facility or visa-versa,with obvious implications for the service locations (Uhl & Upah 1983.13). This requires that decisions have to be taken on capacity levels and demand surges (Van Doren et al 1985.47).

INSEPARABILITY

A service is inseparable from the source that provides it, thus limiting the number of people who can receive the service. In certain instances it may be possible to mass market convenient type services, resulting in a uniform quality of production outlet through economies of scale, in a commodity type of operation (Uhl & Upah 1983.13).

HETEROGENEITY

There is likely to be variation from one service to another and within the same organisation. As a result quality is difficult to judge and as a consequence more personalised service is both sought and given (Suprennant & Solomon 1987.48). In an effort to overcome the consequential risk therefore, consumers engage in risk reducing behaviour, especially social interactions with both service providers and other customers (Van Doren et al 1985.47).

All of the above are valid for a functional approach to services but one which is essentially dependent on contrasting goods with services (Cowell 1984.7;Middleton 1983.49). A further aspect which leans heavily on tangibility is that of symbolism, i.e. symbolism derives from performance rather than possession (Judd 1968.50) while later comparisons continue to emphasise tangibility (Albrecht & Zemke 1985.51).

Some authors do not see services differently from products (Buttle 1986.52;Wyckham et al 1975.20) and as yet there is still little or no consensus definition (Bonoma & Mills 1980.53;Middleton 1983.54;Goodfellow 1983.55;Bateson 1989.56;Blois 1983.57).

SUMMARY

A number of definitions exist as to what constitutes a service,its process and its aims from a marketing perspective.

To understand what is meant by a service,it is necessary to describe as far as possible,the constituent elements that make up the service in order to better understand the salient features. this assists in identifying the specific motives or objectives of consumption or use. Traditionally this has been done on product/market lines,with allowances made for the variables that differentiate services from products.

The first and major variable is intangibility or lack of a physical presence.
Thus there is little the consumer can resort to in their service assessment. This becomes more difficult as the further one moves towards pure service,on the product/service continuum,there is a decreasing number of cues upon which the consumer can base their decision.

A careful evaluation of the selection of alternatives is necessary in order to focus the attention of the consumer to the 'substitute'realities - literature,decor etc and what they represent.

The second major variable 'perishability'points to the need to carefully manage turnover by matching available supply with market demand. This will ensure as far as possible that there is neither excess or shortfall on either side.

Inseparability has implications for the logistics of services marketing and its effect on channel selection. The service provider represents or personifies the service,so inseparability may limit the quantity or extent on offer. On the other hand,the necessary presence of the consumer will limit the number that could be served. This may result in the creation of exclusivity and raised prices,or alternatively,an unsatisfied market potential with the consequences for competition.

Heterogeneity,also largely as the result of the 'people'element involved in the service process,means that each service experience is different from the last. In order to achieve a standardised service,organisations may try to resort to 'industrialising' or 'mechanising'those parts of the process which lend themselves to automation or commodity production.

These would act as a substitute for personal performance if acceptable to the consumer. The alternative is to train employees and customers to the process the company wishes to employ.

Although services are characterised by their differences to products,services marketing is still largely based on the principles of product marketing. The essentials that are used to highlight services marketing depend upon a more perceptive view of the consumption/evaluation process than is necessary with product marketing.

TYPES OF SERVICES

Services are so pervasive that it is only when they start to fail us that we realise how dependent on them we are. (Bateson 1989.55).Classifications can serve either to mis-direct or serve as a first step in understanding the operations of markets (Hughes 1978.57;Hill & Hillier 1977.58).

The original economists classification of primary and secondary markets (Cowell 1984.7) can be extended to include tertiary - retail etc,quartenary - facilitating agencies and quinary - health;education and recreation (Foote & Hatte 1953.59). Services may be related to industry (Whiteman 1981.60),all adding to the lack of a specific consensus on boundaries or classifications of service industries (Stigler 1956.61).

Evans and Berman consider service industries on the basis of purpose,quantity and complexity (1987.62),however it is difficult to separate the contribution of a service from the satisfaction given by the ownership of a particular product (Chisnall 1985.1).

So interrelated are the benefits derived from some products on dependent services,it would be futile to differentiate between the value of the goods provided and the services rendered. Complexity is compounded when one considers the differences in labour intensity or extent of customer contact (Evans & Berman 1987.62;Cowell 1984.7).

No standard service organisation exists,nor can there be one. Each firm faces a particular set of circumstances and should build a flexible organisation to deal effectively with these circumstances (Blaul & Patton 1978.63). Greenfield (1972.64) suggested two categories which were based on durability or life-time of the service and which is supported by Chisnall (1985.1),who approached the problem from the point of view of commercial services and consumer services. This is taken a step further where classification is made on the basis of main beneficiary (Kotler 1982.65) including business concerns,private clients,associations and the public-at-large,each having their own terms of reference. This seeks a solution in the organisation structure 'means dominate ends' (Weber 1946.66) and the ability of the organisation to respond successfully to the needs of its clients.

Unfortunately service organisations are quite heterogeneous which make classification difficult. One attempt (Yekeskel et al 1975.67) looked at predominant functions and types of clients served and the resulting nature of the interaction. This holistic approach was also considered by Lovelock (1984.68) who suggested that if market entities have multiple-partly multiple elements,then a change in one may completely alter the whole. A useful approach may be to segment the services into clusters that show certain marketing relevant characteristics in common. One of the most famous and enduring is 'Copelands'Classification of 'Convenience,Shopping and Speciality Goods', (Copeland 1923.69).

Classification schemes try to make a distinction between various types of service industry and point out implications for management. That is by recognising shared characteristics,new insights will be provided into the resolution of marketing problems. Frequently used dimensions are;degree of contact between customer and the service delivery systems (Chase 1978.70);the nature of customer interaction (Schmanner 1986.71;Mills & Margulies 1980.72).

The systems involved largely consist of either the customer interactive or non-interactive part and a suggestion is to classify companies within industries,particularly where image is based on the capabilities of employees (Van Dierdonck & Brand 1988.73) The need to understand the specific character of the

business and its internal and external characteristics is taken further by Pearce & Herron (1988.74).
Taking two practical approaches,namely Internal (Thomas 1978.75) and External (Lovelock 1983.76) allows for a maximum mix of elements in the provision of service.

For a complete summary of previously proposed schemes for classified services see Appendix 111 (Bateson 1989.55) and Appendix IV (Evans & Berman 1987.62).

SUMMARY

It appears that services may be classified according to whatever criteria are considered relevant,from the perspective of the classifier - be it service,industry,service function or a specific mix of elements that define the service itself,i.e.skill required,person to person contact and so on.
Taking the latter element to person,as being predominent,allows one to adopt the traditional view of service as being a performance by one individual for another,and to go further by tieing it to importance of seller or buyer-related basis in the process.

No two service circumstances or service companies are the same and it is possible to classify them on a realistic basis of either commercial or consumer services,with a further subset 'for-profit' or 'non-profit' This begs the question of organisation structure and level of organisational responsiveness in meeting consumer requirements or 'people changing'.

One may also consider the predominant functions performed,and the type of client served,in view of the heterogeneous nature of the range and mix of specific service actions or functions possible i.e.where a deliberate or inadvertent change may completely alter the entity.

This clustering approach may be extended to cover any number of relevant criteria and concentrate on the 'essentially interrelationships of the particular service.

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DEVELOPMENT OF SERVICES

Discussion of how marketing techniques can be useful in the services sector has largely been limited to banking over the last decade or so. Now it is advisable to extend the discussion to a much wider range of services because of the importance they have assumed in modern economics (Chisnall P.M.1985.15).

Until recently,services were lumped together as personal,commercial,professional and public services and in the U.S. employed more than twice that in manufacturing,similar proportions now existing in Northern Europe (Lovelock 1984.1),rapid growth of large scale commercial operations giving rise to the shift in emphasis towards marketing services (Middleton 1988.2),rather than considering them as second to manufacturing with regard to grants and allowances and the associations of services with inessentials and psychological rather than physical needs (Lewis 1973.3)
In parallel with the development of western social and economic conditions service-related industries have been sorted into five different types and through which many developing countries are now passing (Skelp et al 1985.4).

These relate to the skills of the workforce and the nature of tasks undertaken. As nations become industrialised,productivity increases and the labour force moves into another sector.

The Clarke-Fisher hypothesis classifies economies on the basis of the activity of the majority of the workforce (Clark 1957.5) The concept of five stages of development was also used by Foote and Hatte (1953.6),but whichever approach was used,it seems the more developed the economy,the more services tend to preponder.

Simply put,this suggests that initially pre-industrial societies were agrarian,traditional,routine and authoritative (Bell 1973.7) whereas the post industrial society was concerned with the quality of life as measured by services such as health;education etc.

Along with the growth in population is the mass consumption of goods and services. As services increase,less proportionally is spent on necessities,creating greater demand for durables and services (Fitzsimmons 1982.8). Comparison of societies on the basis of services may then be gauged on the extent to which services have developed (Bell 1973.9).

In the already industrialised nations,affluence and discretionary spending shift demand increasingly into low-productivity, labour intensive service activities. The demand for service amenities produces a parallel effort among the less advantaged economies who finally not only catch up,but surpass the original leaders,primarily because their technology is more modern (Levitt 1986.10).

This new technology plays an important part in the survival and success of companies resulting in the benefits of quicker,more convenient service (Turnbull et al 1987.11).

In the U.K. the reason for the growth of services may be ascribed to 1.a growth in productivity 2.growth in intermediate demand from firms and 3.growth in final demand from consumers (Cowell 1984.12),but that a time lag was imposed due to more rigid technological change in services than in industry (Fuchs 1968.13),but that all told,the growth in service industries is as a result of increasing affluence,more leisure time,a higher percentage of women in the labour force,greater life expectancy,greater complexity of products,greater concern about ecology and resource scarcity and an increasing number of new products (Schoell & Ivy 1981.14).

In Britain public sector spending was £64,000 million in 1981/82 employing over 7 million persons or 30% of all in employment (Chisnall 1985.15).(See Appendix xix,a&b). Even here however there is the difficulty of making accurate comparisons as to what constitutes services and their adoption (Cowell 1988.16;Easingwood 1986.17).

SERVICES - IRELAND

A census of services was initiated in 1988 which covers the distribution sector (wholesale and retail establishments) and all other service sectors - excluding financial and the public sector. Details of the types of business conducted and of the number of persons engaged is being collected in respect of the non-distribution services sector.
Currently information is only available in services which include distribution,in the areas of monthly sales - retail,advertising agencies (annual),banking,insurance and building societies,(quarterly,plus travel and tourism (annual).

On the basis of social well being,Ilbery (1984.18) ranked Ireland as nineteenth of twenty-six European states,where economic potential remains low and the European Commission has designated the entire country as a disadvantaged area (Clark et al 1969.19;Keeble et al 1982.20).

The Irish economy experienced minimal industrial revolution (Gillmor 1985 a.21). By 1926 less than 10 per cent of the workforce was engaged in industry. In 1932 wholesale protectionism restricted foreign industry participation (Meenan 1970.22;Lyons 1971.23).By 1937 tariff levels were up to 40 per cent. In the 1950's,Britain remained the market outlet for 87 per cent of Irelands exports. However following membership of the U.N.(1955);the World Bank and I.M.F. (1957);G.A.T.T. (1967) and E.C. (1973),a major flow of foreign investment occurred (Foley 1986.24). By 1985,imports and exports of goods and services amounted to 55 per cent and 57 per cent respectively of total G.D.P.(Corresponding ratios for the E.C. were 27 and 26 per cent (McAleese 1984.25).

After materials inputs,the next most important costs are purchased services,wages and salaries at about 13 per cent of total costs each. Almost 30 per cent of service inputs are purchased abroad,where the cost of domestically supplied services would be influenced by Irish labour costs and other local factors (O'Malley 1989 26).

Very few services in Ireland operate in anything approaching a free market situation (Cogan 1978.27),the growth of services sector being fundamentally affected by direct government intervention,either being out of the market system or without effective competition.

The highly dispersed rural society,limited commercialisation of the agricultural economy,poor industrial base,weakly developed urbanisation and one of the lowest population densities in western Europe presented a poor environment for the emergence of a service sector. (Brunt 1988.28)(See also Appendix v).

The economic recession of the 1950's slowed down performance in industry,which in turn affected services,especially personal services,professional services growing at a much slower rate reflecting the commitment to the welfare state. Even into the 1970's public sector expenditure continued to rise in an attempt to match service provision of other European states. (Gould 1981.29)Appendix vi;vii;viii.

By 1981 services accounted for over 50% of all employment (Bannon 1985.30) the Irish society and economy favouring growth in most service sectors,especially producer services (Bannon 1979.31). Increasing state involvement in management of the economy and society accounting for a large increase in service employment - particularly public administration and defence (Sexton 1982.32).

Although white collar employment increased between 20% and 40% between the 1960's and 1970's by 1981,women only accounted for 28.3% of the labour force (Bannon 1985.30), almost exclusively in the tertiary sector and most notably,professional services (Gillmor.1985.21)

Still despite increasing importance being attached to services,no coherent policy had emerged other than to attract internal service firms through the I.D.A. and the exporting of technical and professional services (Bannon 1985.30).

Patterns of Irish Consumption

Although personal expenditure has increased,taxation has risen disproportionally,with adverse effects on consumer spending (Brunt 1988.28)Appendix x Table 1.1. Government as well as market forces have contributed to the centralisation of private services (Dawson 1972.33;Cowley 1986.34). Still growth has been the result of the increased demand for services as a result in the growth in industry,services being allocated to specialist firms in the tertiary sector (Brunt 1988.28).

In the 1970's public service employment grew at three times the rate of private services,furthermore services were less affected by automation,in a recession there being fewer redundancies in the tertiary sector (Gillmor 1985.21),instanced by education and primary health care which also were subject to strong centralisation (Curry 1980.35;Brunt.1988.28).

In 1985 Bannon wrote 'there appears to be little understanding of the role of services in promoting development and as a result instead of a more equal distribution of service activities throughout the country there has been further concentration on the East region and in Dublin in particular,contributing significantly to local job creation in the capital city and more than compensating for the decline in manufacturing'(Bannon .1985.30).

Service industry growth may even arise from redundancy payments as well as employment creation schemes,i.e.basic and then greater variety and higher quality of services.
The propensity to concentrate in urban centres results from the agglomerate force of interrelationships amongst services and consumers and from the tendency for many to locate accessibility to consumers in accordance with central place processes (Gillmor.1985.21)Appendix xii,(O'Brien 1984.38)Appendix xiii,Table 3.

There are great differences in service accessibility and the resulting equity in following a policy of centralised services,especially for remote rural areas. This may be instanced by the distributive trades.
For example the distribution of retail sales is shown in Appendix xiv,Table 7 and Fig.7.2,indicating increases recorded in sales volume which mainly reflect the changing consumption patterns along with greater affluence (Cogan 1978.27).
There was a decline of one fifth in the number of grocery shops between 1977 and 1983 (Neilsen 1984.39),and a policy of specialisation as a result of demand and concentration (especially Dublin) in food,clothing and footwear (Horner.1970.37;Sexton.1970.40). Such a policy having varying degrees of effect on consumers - this clustering tendency also being apparent in financial services and business service employment (Parker.1976.41).

While largely as a result of the expansion in education and medicine,professional employment more than doubled between 1951 to 1983,employment in personal services being associated with the growth of tourism,travel and catering and although this is covered later,it must be indicated that the tourism population,even in the accommodation and catering sectors is not know exactly.

It was estimated that direct full-time employment attributable to tourism in 1977 was 26,000 (NESC 1980.42). Applying the tourism multiplier, proportion of GNP would indicate 62,000job (full-time) equivalents in 1983 (Gillmor.1985.21)

SUMMARY

Previously service provision was regarded as secondary to goods production - it was unproductive,being associated with luxuries or inessentials. However in a progressive,dynamic economy there is migration away from the traditional industries,made possible largely by technology (i.e. automation and substitution) towards other sectors,mainly in support roles.

Following on from the growth in population and mass productivity of goods and services,comes income increase and proportionally more is spent on durables and services - which are low-productivity, labour intensive activities, which themselves allow the 'followers or less advantaged, the opportunity to follow suit through spin-off and emulation.

New technology plays a particularly important role in improving productivity and control, both of customer at contact level and in administration.

In addition to affluence, growth in service industries is as a result of greater leisure time, female labour, life expectancy as well as product complexity and variety.

Ireland ranks 19th of the 26 European states and is designated as a disadvantaged area, being third poorest. It was virtually byepassed by the Industrial Revolution and the first national census in 1926 gave an industrial workforce of less than 10 per cent. Following from its traditional 19th century role of providing food and labour for Britain, by the 1950's Britain still remained the market outlay for nearly 90 per cent of Ireland's exports, (80 per cent agriculture).

Following entry to the main international bodies (I.M.F., G.A.T.T. etc), between 1955-1973, by 1985, imports and exports of goods and services were just over half each of gross domestic product, as against one quarter for the rest of the European Community, -almost one third of services being purchased abroad.

Major public services are not open to the market system,having been fundamentally affected by direct government intervention in provision and consumption which affects the character and supply of such services - particularly as a result of expenditure during the 1960's and 1970's.
Ireland was not well placed for the development of a services based economy as a result of its agricultural background and low-density population. Yet as a result of new jobs outside agriculture,by 1981,the services sector accounted for over one half (54%) of all employment,reflecting the growth in the economy and State involvement,especially in administration and defence. Despite the importance of services,there appears to be no coherent guiding policy and personal taxation has risen disproportionally - adversely affecting consumer spending power.

Traditionally growth is as a result of increased demand from increased income,but in response to government endeavours,public employment is four-tenths of the total tertiary sector and there has been little equal distribution of services,being concentrated in the east of the country,especially Dublin,promoting further job creation in spite of redundancies.

The tertiary sector is made up of many different services,which for statistical convenience have been grouped together and comprise distribution,financial and business,professional and personal & public,administration and defence.

These make up seven tenths of the sector,while transport,tourism and recreation make up the remaining three tenths. The concentration is mainly in urban centres,requiring accessibility to a consumer market,although geographic or national control is aided by advances in technology and administration,but with regional differences as to quality.

Distribution is the largest employer at 25 per cent of the tertiary sector,located largely in Dublin. Success is attributed to accessibility,prices,range and hygiene.

Financial and business services make up virtually the whole of the balance of employment in the tertiary sector as described:Banks 50%;Insurance 25%.

There is a strong clustering across the board of services in response to population densities and hence,local demand.

Both Professional and Personal services and Tourism and Recreation have shown increases as a result of growth in tourism,travel and food consumption outside the home,in addition to growth in personal and welfare/charitable services.

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CONSUMERISM

"Any explanation of economic activities which does not also take note of the psychological make-up of the consumer,his roles in society and the cultural background that flavours his orientation towards life is likely to result in unsound business decisions being taken by manufactures and distributors of a very wide range of goods and services. (Chisnall 1985.1)

Achieving consumer satisfaction requires an organisational marketing system that looks further than internal operating systems and procedures rather that develops a system which has as its objective the achievement of a more comprehensive approach to consumer satisfaction ratings in turn would serve as a better measure of the companys success.

Part of the evidence for this may be shown by supplying more and better product information to the buyer,along with a revision of the criteria of acceptability for promotional efforts (Ad Age 1971.2).

Consumerism has been described as the "organised efforts of consumers seeking redress,restitution and remedy for the dissatisfactions they have accumulated in the acquisition of their standard of living"(Drucker 1969.3).

The emphasis on consumerism has been enhanced by increased leisure time,and higher incomes. Rising prices have also led to increased consumer expectations and the demand for product improvement has led to increased product complexity (Chase & Sehlink 1934,in Bell & Emory 1975.4).

Consumerism may be seen as a social movement which seeks to redress the imbalance with regard to the rights of buyers,as against the rights of sellers (that traditional 'opportunistic'right to continue to stimulate the market with new products and service.(Chisnall 1985.1).

Companies which are skilled in communicating what they are doing for society are those which are clear about their own identity and over time are able to sustain an identifiable stance which truly reflects what they are (Burdus 1980 5). so in their communication strategies,companies should take heed of the wider issues which society has clearly shown it holds to be of importance.

The arguments propounded reiterate the assumptions that were challenged over thirty years ago,in that consumers really know their own needs,that business really provides useful information that clearly matches product to need;that business really cares about those needs and knows how to find out about them and that products and services really deliver what consumers expect and business promises (Drucker 1960.6).

The entire company from the top down should be prepared to give satisfaction of its customers the highest priority (Blood 1978.7).There will always be some form of compromise in order to reconcile the aims of the company and the needs of its customers,within the resources available to it,but the controversy appears to revolve around the 'environment' in that what is good for industry cannot be good for the environment (Nelson 1978.8) and that marketing has been insensitive and slow to respond to consumers real needs and expectations and there has been,at best,only limited protection against the deliberate exploiter (Rodger 1973.9).

It is the contention that it is the purpose of marketing to respond to the legitimate needs and aspirations of consumers and that where a case exists the consumer movement would not be seen as a threat,but as an opportunity for improved marketing. This is much more likely to result in the promotion of social programmes and ideas than is simple profit-oriented marketing. The use of marketing to increase the acceptability of social ideas being referred to as social marketing (Evans & Berman 1990.10).

Social responsibility however,involves a concern for the consequences of a persons or institutions acts,as they might affect the interests of others. Corporate social responsibility seriously considers the impact of the companys actions and operations in a way that balances short-term profit goals with societies long-term needs,thus ensuring the companys survival in a healthy environment (Bonnet 1988.11).

The investment in information will mean an increasing commitment on the part of suppliers and difficulty of collection by customers. The resources available and required by each consumer in the search process will vary,not only as a result of urgency or commitment but also finance,time span available as well as access to that information (Firat et al 1987.12).

For example,time is a limited resource while buying and consuming are part-time activities and will vary among consumers. Time is restricted by the total load of activities of the individual and the importance of the buying activity (Jacoby 1978.13).

Just as the marketing manager must understand and adapt to cultural and social changes taking place,so must the political,legal and regulatory environments in which the organisation operates (Haas & Wotruba 1983.14). The emphasis then is on information to consumers to help them make better decisions rather than on political pressure (Mitchell 1978.15).

The issue for business is two-sided. How far should the firm be constrained by society from actions that are inimical to the public good - even if such actions are 'essential' in order to make a profit ? Can self-selected individuals decide how great a burden they are justified in placing on themselves and on their stakeholders to serve that interest (Stoner & Wankel 1986.16).

A number of different models of the marketplace have been put forwards in an attempt to account for some of the conflicts that arise between marketers and public policy groups (Greyser 1973.17) of which Chisnall asks if these projections are based on objective information about how customers actually behave or do they derive from notions about how they should behave ?(Chisnall 1985.1) i.e.what the consumer should do,as compared with what he thinks others think he should do (East 1990.18) and the abilities of marketing managers to manage in the social domain (Lazer & Kelley 1973.19;Lavidge 1970.20).
Success then depends on satisfying the needs of various groups,be it a tangible product,service or information or a combination of all (Kotler & Levy 1969.21) and that it would be profitable for companies to apply the principles of consumerism (Kotler 1972.22).
Replacing 'caveat emptor' by 'caveat vendor'the marketer must accept responsibility for product/service performance (Rosenberg 1977.23),but can marketers be both socially responsible and competitive (Yankelovich 1973.24).

As stated,customer satisfaction derives from the level to which customers expectations are fulfilled (Swan & Combs 1976.25),but customers expectations change over time and the service throughout its performance (Albrecht & Zemke 1985.26) so each input variable must not only raise interest and enquiry,but also provide solutions to any queries (Levitt 1981.27) otherwise marketers will be faced with "organised efforts of consumers seeking redress,restitutions and remedy for the dissatisfaction they have accumulated in the acquisition of their standard of living"(Buskirk & Rothe 1970.28).Corporate executives must insist on new and higher levels of marketing integrity,finding greater profit as well as other satisfactions,in greater public service (Weiss 1968.29).

SUMMARY

The success of marketing is achieved by gaining customer satisfaction. By so doing,the company establishes a fund of marketing goodwill,which is necessary for long-term survival.

It is generally assumed that the consumer wants and is able to discriminate between different market competitors and will select out the winners for themselves. The result of this is that the less successful companies will fail through lack of custom.

Various consumer groups have emerged as a result of necessity as well as choice,to challenge the sellers previously dominant position in the marketplace. They have taken on board responsibilities that otherwise,in an altruistic consumer society,might be expected to be within the domain of the company or industry. As an increasing market force,it is in the essential interests of the seller to provide answers and solutions to their demands.

This requires that policies and procedures are integrated within the organisation to identify with the consumer - even to the extent that company advantage takes second place to social responsibility.
This approach would be actively marketed by the company. However does the company know or is it capable of knowing what is in the best interests of the consumer ? Traditionally it has been a case of the customer not knowing what he wants until he doesn't get it. Companies may achieve such an approach with varying degrees of success. Competition would be fought on a wider range of issues,which in the long-term should be in the best interests of the consumer.

Change has long been used as a competitive weapon,but how much change can the seller offer and the consumer accept or need ? In the information struggle between buyer and seller,innovative marketing may provide the solution to the consumers problem,but must the consumer ask for knowledge which the company may be unable or unwilling to give in such a competitive environment.

Social responsibility suggests that it is up to the seller to know the market both morally and physically. Provided the company could bear the cost of such an advantage (e.g.research),this would give long-term advantage.

Marketing companies may accept that such an approach is inevitable and the sooner a consumerist approach is adopted,the sooner the company will be able to market this service as part of the added value of their product and/or as a marketable product in its own right.

The consumer marketing concept requires acceptance,practice and promotion throughout all levels of the company.

Rather than seeing the target consumer as a potential enemy,marketing would identify with the consumers legitimate demands and supply sufficient information of the right kind,in order to allow them to make an informed decision,one which will better serve their interests and also achieve the companys goals.

The alternative is short-term savings by ignoring customers needs,the ultimate cost being company failure,brought about by lack of demand as a result of social and possibly legal sanctions.

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INTERDEPENDENCE

Services is no longer a separate category for managers to consider,but rather an all pervasive part of their strategic mission and corporate planning. The best companies of the future will be those who find ways of developing services to create and keep customers and thereby sustain a competitive advantage,moving from the old and outdated focus on goods and services to integrated 'bundles of systems'with services in the lead role (Vandermerwe & Rada 1988.1).

Marketing management embraces the management tasks of analysis,planning,implementation and control of programs designed to bring about desired changes with target audiences for the purpose of personal or mutual gain (Kotler 1972.2).

There are three levels of management to whom these tasks will apply,namely top or conceptual,middle or human-related and first-line or technical management (Stoner & Wankel 1986.3).

Chisnall also identifies with three principle tasks of management,which are to decide on the nature and extent of products,the arrangement of their production and their sales and distribution (Chisnall 1977.4).

Organisations are groups of people and are managed by people-the enterprise is a community of human beings (Drucker 1961.5).

Inputs include labour,raw materials,equipment,finance and executive talent (Anderson 1957.6). As a result marketing managers fill the roles of interpreters-analysing and evaluating market behaviour and integrating the market plans with other organisational activities (Chisnall 1977.7),in addition to being responsible for all other marketing activities (Maxwell 1989.8).

Several aspects of marketing,such as identifying and measuring marketing opportunities will overlap general management activities to a considerable degree (Baker 1985.9). In order to function effectively this will require the necessary authority over those functional departments that will contribute to the execution of the plans (Thomas 1982.10),and that there is an organisational structure that will permit the translation of strategic plans into action (Baker 1990.11).
For example,purchasing and marketing must be sensitive to the other (Davies 1974.13);consider the danger of relying exclusively on one supplier (Hakansson 1983.12).

The same applies to production-layout,handling and control (Alderson 1957.14) ultimately they both have the same goal-to meet the specific needs of customers (Blois 1980.15).

Such an approach demands a wider understanding of 'quality'in the sense of fitness of purpose (Peters & Waterman 1982.16;Gilbert & Bailey 1990.17). Organisations should be ever vigilant to identify their distinctive competences and be also sensitive to the fact that what is currently a significant advantage,may become of less relevance and even in extreme cases,a disadvantage (Blois 1989.18).

In a dynamic market the company needs to look to every opportunity to differentiate from its competitors,for customer and employee benefit (Lele & Sheth 1988.19).

The success or failure of a service firm can be attributed to its management ability to manipulate the customer/server experience (Parasuraman et al 1985.20) by developing a customer-oriented,interactive marketing function,in the case of professional services, seen as the operation of assignments (Gummesson 1979.22).
This means a better balance between marketing and other management functions - especially operations (Webster 1978.23) and personnel (Booms & Bitner 1981.24;Lovelock et al 1981.25).

Internal marketing has been described as a philosophy for managing the organisations human resources based on a marketing perspective (George & Gronroos 1989.26) as employees remain the key to success (Carlzon 1987.27) when the service provider and the customer meet and interact (Norman 1984.28;Arbeit 1976.29;Tarver 1987.30).

To this end marketers should develop the dynamic equivalent of blueprints for service design (Shostack 1984.31) resulting in the appropriate organisational structure in response to the need for superior service (Janson 1989.32),a main feature of which will be teamwork and cooperation among individuals within departments and across different departments in service design and delivery (Zeithaml et al 1988.33;Davis 1969.34;Bowen & Schneider 1988.35).

The concept of internal marketing in quality of output is well documented (Berry 1983.36;Heskett 1987.37;Lehtinen & Lehtinen 1982.38;Gronroos 1982.39;Berry et al 1985.40 & 1988.41),and their capacity to satisfy consumer expectations (Oliver 1980.42;Oliver & DeSarbo 1988.43;Engel et al 1990.44;Folkes et al 1987.45).

The process is seen in the context of exchange theory between supplier and client (Blan 1964.47;Hosenfeld & English 1972.48;Emerson 1972.49;Simmel 1971.50),the connection between the two being the value (price) of the resources (Leftwich 1966.51).

The extent to which effort is expended being determined by the service organisations constitution (Berry 1981.52),and the rights and obligations of participants (Zold 1970.53;Marcson 1960.54). Both consumers and service providers comparing what is being offered and received with others in the system.(Adams 1965.55).

However inability of server and/or customer to accurately assess the others performance will affect the appropriateness and value and quality of the service (Holstrom 1982.56).

In order to create a quality service experience for consumers,organisations must create a quality service experience for their employees,featuring membership,socialisation, identity,structure,interpersonal and environmental issues (Schneider 1986.57;Chase 1978.58;Cowell 1986.59).

The amount of customer contact will effect many of the decisions operations managers have to make (Constable & New 1976.60),furthermore consumer resistance to changes in familiar environments and long established behaviour patterns are likely to thwart attempts to improve productivity etc,in service organisations(Lovelock & Young 1976.61),their having differences as to motivations,revenue,timings and fit of new service (Langeard,Bateson,Lovelock & Eiglier 1981.62).
The result may be a compromise between partially conflicting parties-the customer,the server and the service firm,each having their own objective from the experience (Bateson 1989.63).
Satisfaction is derived from the level to which customers expectations are fulfilled (Swan & Combes 1976.64) and which may be expected to change over time and throughout its performance(Albrecht & Zemke 1985.65).
Management theory has not yet developed the vital role customers play in the organisational dynamics of companies (Peters &

Waterman 1982.66),principles derived from studying manufacturing not being effective in services (Davis 1983.67).where both customers and employees constitute the resources of the service organisation (Czepiel et al 1985.68).

At its extreme,customers may constitute an interest group with whom employees identify,even to the expense of corporate goals (Aldrich & Herker 1977.69;Chase 1978.58;Danet 1981.70).A solution for which is to isolate customers from the operations side of the business,relieving staff of possible disturbing effects (Thompson 1967.71).

It may not be desirable to have the customer present;where they are,much of what is visible to the employee is visible to the client and the client may be expected to actively assist in the creation of the service (Bell 1973.72),when they can supplement or substitute for the labour and information provided by employees (Lovelock & Young 1979.73).

Such an approach demands that customers understand how they are expected to perform,they are able to do so and that they will be rewarded for their participation (Vroom 1964.74) even though employees may still find some difficult customers stressful and may not show their true feelings (Hochschild 1983.75).

So if in a service operation the customer has a production role as well as a consumption role,then why not consider them as an employee and be more specific about the nature of their task (Bateson 1985.76).

Continuous improvement in customer service is an investment especially in the case of trial generation and initial customer commitment (Reichheld & Sasser 1990.77) given that most companys already measure customers perceptions of their service - badly (Coyne 1989.78)

Creating a customer centred culture,responsible to both 'internal and external'customers can be done by addressing quality,productivity,profitability and innovation - Total Performance Management (Lowton 1989.79) and that those responsible for satisfying clients are given the responsibility and authority to make the necessary decisions (Finkelmann & Goland 1990.80;Parasuraman et al 1985.81) as it is by meeting or exceeding customers expectations that gives rise to sales and profits (Thompson et al 1985.82). It may even be to the companys benefit to dramatise elements of the service in some tangible way,in order to get the customers to recognise the work done (Moutino 1991.83).

SUMMARY

In order for the company to achieve its goals,it is necessary for all functional areas of corporate activity to identify with each other. The concept of interdependence concentrates on the seemingly separate tasks and aims of both service providers and customers. However an holistic approach is required which goes beyond the separate divisional approach that would emphasise departmental goals and standards. With such a production orientation the principle seems to be that the company is running correctly and therefore the customer must ergo,be satisfied. Where the marketing concept permeates each section of the company,service personnel,whether dealing directly with the customer or in a support function,are aware of the ultimate aims of the company and their role within it.

Demand gives rise to expectation and visa-versa,so in order to achieve efficiency and satisfaction with the service outcome,some companies have looked to a)the training of their service providers to a set standard and b)attempting to guide the customer as to the content of their expectations. This would be in order to bring their demands more in line with the elements that make up the service package that the company can offer. This education of expectation may begin in the buyer behavioural process,as early as the problem recognition stage and continue throughout,with appropriate information and reinforcement stimuli - visual clues,directional signs,theme development are all methods by which the consumer may be channelled into the appropriate system.

Each of the separate components or stages which comprise the

service package provides the opportunity for satisfactory or unsatisfactory performance,the brunt of which will have to be borne by the visible service operator of the company. There are various criteria for measuring the performance of the service personnel and in so doing derive specifications for their training and development. However the emphasis must be on coordination in order to ensure synchronization of tasks over the time period of buyer/seller interchange. One approach is to refer to the major task input into the process and to identify the sequence of production within the company,where each subsequent stage is viewed as a customer to its prior stage. This requires an all-embracing role for marketing management and varying degrees of responsibility and authority for service personnel,especially those dealing directly with the public.
It is up to these latter personnel to provide the elements that make up satisfaction for the client and which give rise to impressions of quality of service. They are in turn dependent on the structure of the organisation,the nature of the task and the varied abilities of their colleagues (and their own),to satisfactorily meet the demands placed on them by their customers. Such an approach requires the communication of appropriate objectives (corporate,divisional or operational) and the strategy to be followed,as well as the roles of personnel and client. Specialist media may be used in specific areas to overtly

identify and highlight these. Examples include in-house publications,video and promotional material as well as point of service displays.
The marketing structure of the company may be the result of the product/service,its stage of development,market sophistication or demand,as well as managements'desire to achieve a marketing orientation. In particular it will reflect the value placed on the service offering,by the customer and the ability of management in measuring this and providing the requisite type and level of service in line with competition.
The company may try to encourage a corporate personality by actively recruiting and selecting personnel who possess particular attributes the company may view as an extension of their desired image. Every organisation will aim to recruit staff with basic skills which will enable them to perform the tasks expected of them,as defined by their job specification. This may go beyond intelligence and technical ability measures,to include other criteria such as manual dexterity,height or physical attributes etc,(bearing in mind discrimination) as required by police,airline cabin staff and such.

In time,staff may conform to a company culture either as a result of positive policy by management or by default,where the personnel identify with separate informal groups,which may or may not be task-related. These latter groups may or may not contribute to the problem of maintaining consistent standards of service. This is a problem which is compounded when a service is delivered at multiple sites or where service is performed at a distance. A further contributor is the problem as to the extent of delegation and spans of control. Quality control standards may be laid down for each step,but because of the human element and real-time environment of service production,it is much harder to standardise services,than products.

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CONSUMER DECISION MAKING

By the late '1960's a growing emphasis on psychological constructs and processes became evident in marketing (Nicosia.1971.1;Aaker.1986.2).

Consumers act not only in the commercial environment,with stimuli such as product and package designs,but also in a social environment. For some types of problems,the psychological process of consumer research is useful,providing information as it does for action,for brand managers,creators of product and package designs and advertising strategies,while cultural values and institutionalised norms may be meaningful in the psychological processes underlying consumer behaviour (Nicosia.1966.3).

What people want are products and services which will give them acceptable benefits or satisfying experiences-experiences which are obtained through activities. People want products because they want the experience - bringing services which they hope the products will render (Abbott 1955.73).

This assumes that the beliefs about means-ends relations can be weighed by the evaluation of ends and summed or otherwise aggregated,to explain the interactions that guide behaviour (Fishbein & Ajzen.1975.74).

Problem-solving behaviour has been characterised by the arousal of a problem or question,by deliberation that requires reorganisation and direction,by understanding the requirements of the siutuation;by weighing of alternatives and taking their consequences into consideration and finally;by choosing among alternative courses of action. Problem solving results in an action that is new rather than repetitive (Katona.1953.4;1946.5).

The argument of problem-solving behaviour is based on the principle that the individual makes the same choice each time he is confronted with the same set of alternatives (Arrow.1951.6).

Proceeding in the same way on successive occasions appears to be a characteristic of habitual behaviour,but problem solving behaviour is flexible. Rationality may be said to reflect adaptability and ability to act in a new way when circumstances demand it,rather than to consist of rigid or repetitive behaviour.

The theory of consumer behaviour has it that there are essentially four groups of factors which influence consumer

behaviour,namely;

External Factors +	>			Stimulus
Individual Factors +	>	Purchase Decision	<	Object
Buying Process	>			

(Source:Holloway et al.1971.7)

External factors (culture;social class;intra-household communication and influence process etc Davis 1972.8)). The consumers cognitive world is influenced by his past experience,needs,personality and social environment. His decision whether to buy or not to buy is influenced by his perception,personality,learning and attitudes.

In the most notable models of consumer behaviour the buyer is seen as a problem solver and information processor. The consumer is seen to be purposive,seeking to fulfill certain goals through his purchasing behaviour. Buying is considered as a process with consumer predispositions becoming more specific throughout the process until a specific brand is purchased (Fitzroy 1976.10).

The expectancy theories assert that an individuals predispositions to given behaviours are governed by the set of satisfactions presumed to flow from such behaviour,together with the probabilities of obtaining these satisfactions through such behaviour (Bass & Wilhie 1973.11). These product attributes must be determinant or salient;considered important by consumers and on which the products are believed to differ (Myers & Alpert 1968.12).

Attitudes also may play a part in the behavioural process,(Williams 1988.13) in that the significance of the consumers attitude towards the object or outcome was proposed and

which was developed further to consider attitude towards the consumers behaviour,but can behavioural intent be accepted as a satisfactory surrogate for behaviour (Sampson 1980.14).
The specific courses of action taken by consumers and the goals chosen are selected on the basis of their thinking process (i.e. cognition) and previous learning (Williams 1988.13).Also needs may be physiological or physiological which are interdependent;one does not exist without the other. Furthermore the motives may be positive or negative;rational or emotional (Katona 1953.4).
The assumption underlying this distinction is that subjective or emotional criteria do not maximise utility or satisfaction. However it is reasonable to assume that consumers always attempt to select alternatives that in their view,serve to maximise satisfaction.

Assessment of satisfaction is a very personal process,based on the individuals own need structure as well as on past behavioural,social and learning experiences (Weinberg & Gottwald 1982.15). Depending on what is the objective,research on information processing has revealed that consumers frequently develop short-cut decision rules (heuristics) to ease the process (Bettman 1979.19),i.e. the effort is likely to cease when a sufficient amount of information is obtained concerning some of the alternatives,that is enough information to enable an 'adequate'decision to be made.

A study and analysis of consumers buying behaviour allows the marketer to know not only the relevant product attributes and benefits to promote,but also the most effective communication channels to use during the promotion process (Fletcher 1988.20). Howard (1977.21) perceived individuals as rational information seekers and users in order to solve consumption problems. While this perspective has been criticized (Foxall 1983.22;Nord & Peter 1980.23),it is generally accepted as offering the greater degree of explanation of buyer behaviour particularly in promotion. But even here there is conflict regarding the applicability of problem-solving and information seeking conception of consumers (Ray 1973.24;Robertson 1976.25). That people strive to maximise utility and have perfect knowledge in the search for the optimum solution have long been rejected (Simon 1956.26).

The decision-process approach is the basis for most of the general models of buyer behaviour (Howard & Sheth 1969.27;Nicosia 1966.28). John Dewey was one of the first to consider the stages of decision making. By 1972,Hansen was able to provide a summary of 28 basic models,the most widely know probably being that of Strong (1925.31) identifying the stages of attention,interest,desire and action. This approach was further developed by Rogers (1962.32);Lavidge & Steiner (1961.33) and Colley with DAGMAR (1961.34). (See also Ray.1973.24;Hoveland 1957.35),examples include; the effect of print media,influence of friends or trial experience,or by a changed perception of the product attributes and salience during purchase (Fishbein & Ajzen 1975.36) and long-term behaviour reinforcement (Festinger 1957.37).

However the sequence of events need not be uni-directional,sequential or linear and may not require an attitude change. Consider the case of low-involvement ;the consumers selective process may not be particularly activated and mass media appeals may be sufficient to induce the consumer to act (Robertson 1975.25).

The problems of not being able to tie the consumers to a particular high or low-involvement model led to the development of measures of consumer involvement (Zaichkowsky 1985.38) and a consideration of its relationship to perceived risk and the importance of purchase (Block & Richins 1983.39).

Whether information is actively sought or not,it is accepted that mass media are most used during the initial stages of the decision process (Mason 1964.40;Beal & Rogers 1957.41)

While personal sources are most used in the later evaluation stages (Engel,Blackwell & Kegerries 1969.42;Kohn-Berning & Jacoby 1974.43),if exploration and deliberation continue,they will include new alternatives and values so that perception is altered and new comparisons made (Hansen 1972.30).

The value of the information is likely to dictate the extent of search and that information search follows the least effort rule - sources are selected because of their availability and the requirement or need for further search, in effect this means that as long as satisfactory solutions are not established and deliberation and exploration are more attractive than any of the choice alternatives - the conflict will continue (Cyart & March 1963.44). Thus various combined responses may be tried consisting of some immediate action plus some kind of internal response that will eliminate internal conflict in favour of some suitable alternative (Abelson 1959.45).

The 'experiential perspective'argues that in certain instances consumers make purchases in order to create feelings,experiences and evaluations rather than to solve problems,whereas the behavioural approach proposes that in other instances consumers act in response to environmental pressures (Mowen 1988.46).

The decision-making perspective viewed problem solving activity as moving through a series of stages (Howard & Sheth 1969.27) to the neglect of other consumption phenomena ,such as playful leisure activities and actions taken for emotional reasons (Olskavsky & Granbois 1979.47;Holbrook & Hirschman 1982.48). This concept is interesting in the context of impulse purchasing (Engel & Blackwell 1982.49) be it for variety or otherwise (Venkatesan 1973.50;Mowen 1987.51).

From the behavioural influence perspective one does not have to appeal to internal processes to explain certain types of consumer actions - rather the direct influence of behaviour via environmental forces,(building design,music etc) (Milliman 1982.52) and for predicting how consumers will react to various reinforcers in the environment - such as sales promotions (Mizerski & White 1986.52a;Rothchild & Gaidis 1981.53) and credit card stimuli (Feinberg 1986.54).
From the experiential perspective,managers should investigate how features of the environment,such as music,textures and odours influence moods,feelings and emotions (E.G.nice weather correlating with restaurant tips) (Cunningham 1979.55),so that customer mood may be improved by providing outstanding service,store decor and thus environment.

Adam Smith developed the principle that man is motivated by self-interest in all his actions ignoring the question of how product and brand preferences are formed (Kotler 1965.56). Pavlov concluded that learning was largely based on four central concepts -drive,cue,response and reinforcement (Dollard & Miller 1950.57),while making no claim to providing a complete theory of behaviour as it does not adequately treat the phenomena of perception, sub-conscious or interpersonal influences do offer some insights about behaviour (Howard 1963.58).
Finally Veblen saw man as a social animal,his wants and behaviour

being largely moulded by his present and aspired group memberships (Veblen 1899.59),i.e. attitudes and behaviour are influenced by several levels ofsociety,culture,subcultures,social classes,reference groups and face-to-face groups.

THE MODEL PROCESS

'Models cannot be regarded as anything more than a rough approximation to a complicated reality' (Karmark 1983.60). As was seen,monadic models (which are derived from one discipline) were supplanted by more complex models which took account of research findings from psychology,sociology and cultural anthropology,as well as economics. These multivariate models reflect the eclectic approach in that 'they synthesize relevant knowledge from the various behavioural sciences'(Lunn 1971.62). For example,the 'perceived risk'model was theorised to depend upon an individuals subjective perception of the risk inherent in particular buying propositions (Bauer 1960.63). But some people are risk seekers,while others are risk avoiders so that precise measurement is not feasible (Sternthal & Craig 1982.64;Cox 1967.65;Rosluis 1973.66).

The more comprehensive models try to formalize the multiple influences which affect purchase decisions and to show the extent of their interaction. The consumer is typified as a problem solver aroused by some stimuli,who has to cope with information and inputs from a variety of sources. Information is processed,economic,socio-cultural and psychological influences are evaluated and the result leads to purchase (immediate or postponed) or to rejection of the offer (Chisnall 1985.108).

Chisnall highlights a number of multi-variable models of which four are mentioned for example;
i)The Howard-Ostlund model,developed in 1963 was expanded and refined by Howard and Sheth in 1969 and further refined by Howard and Ostlund in 1973 (Howard 1963.58;Howard & Sheth). 1969.27).2) The Engel,Kollat and Blackwell model. Both these two models have been criticised,the former because of the uncertainty of achieving the variables as measures in fact,the latter because it does not specify the preconditions under which outcomes will emerge. It is the value of the outcome of the strategy that is important,rather than the strategy-outcome relationship (Sternthall & Craig 1982.64).

The Nicosia model is based on the technique of flowcharting with feedback loops. Here there is a shift in emphasis away from the purchasing act itself towards the decision processes that both precede and follow this act.(Nicosia 1968.67). Chisnall also suggests that this model suffers from over rationalisation being based on a very restricted example of advertising and product acceptance (Lunn 1978.61 op.cit).

The Andreason model develops a general model of customer choice behaviour built upon several conceptions about attitude formation and change,drawn from social psychology (Andreason 1965.68). The Sasser,Olsen and Wyckoff consumer model attempts to indicate how a market segment of consumers with similar needs and behaviour makes judgements about services (Cowell 1988.69).

The Fisk Consumption/Evaluation process model describes the consumption /evaluation process for services highlighting three stages of preconsumption;consumption and post-consumption.

The Sheth Family decision-making model identifies the separate psychological systems which represent the distinct propositions of the family members and the factors which influence whether the purchase will be autonomous or joint (Sheth 1974.70).

Bettmans Information -processing model of consumer choice subscribes to a distinctly cognitive and information processing point of view and consists of a number of interrelated flowcharts that depict the various dimensions of the consumer choice process.

Only the Howard-Sheth model has been subjected to more than a minimum of systematic testing;the Engel-Kollat-Blackwell model,modest testing;and the Nicosia;Sheth Family and Bettman models,none at all (Zaltman et al 1973.73;Hunt 1976.72).

Holbrook illustrates the consumer experiences and some of the difficulties in trying to come to terms with a multifaceted approach (Hirschman & Holbrook 1985.75).

Firstly they distinguish between acquisition,consumption and disposition phenomena (Jacoby 1978.76;Sheth 1985.77).
Second,consumption is an experience rather than a decision.
Third.Primary selection concerns the allocation of resources among products rather than brands.
Fourth,Nothing can yield value except through experience of its services.
Fifth,The time distinction between durables and non-durables.
Six,resource allocation is concerned with the investment of time,effort and ability as opposed to money (Csikszent Mihalyi & Rochberg-Halton 1981.78).
Seven,the consumption experience contains multifaceted emotional components that extend far beyond simple effect (Denzin 1984.79;Giorgi 1970.80).
Eight,many behavioural expressions fall outside the bounds of conventional personal or social norms.
Nine,the consumption experience is a complex whole that cannot be meaningfully be decomposed into isolated parts.
Ten,the criteria of relevance (to the problem) spring from the interests of the consumers themselves and not from those of any managers who might wish to benefit from,improve upon or otherwise alter the nature of their consumption experiences.

The multi-faceted aspect of consumer behaviour has been addressed as 'the acts of individuals directly involved in obtaining and using economic goods and services,including the decision processes that precede and determine these acts' (Engel et al.1973.81). The relationship between the stimulus and the response is governed by what goes on in the consumers mind and so inferences must be drawn on what actually takes place (Rosenberg 1977.82).

However there are significant limitations to our ability to explain consumer behaviour because of the primitive nature of behavioural concepts and techniques;what they mean and how they may be measured. The basis for marketers control over consumers according to critics (appearing to be still current),is the manipulation of peoples deepest feelings and fears (Sharpe 1974.83).

What is crucial is to identify the elements of decision making,to observe the structural or substantive changes that occur over time due to the repetitive nature and show how a combination of decision elements affect search processes and the incorporation of information (Howard & Sheth 1967.84).

It is common to consider the factors that influence the consumer as identical with those that can be manipulated by the marketer,but many more impressions are received by the consumer than those simply transmitted from the producer;i.e.stimuli of which the product itself is part;what is symbolically represented and other stimuli of importance for the consumers behaviour (Hansen 1972.30). While it has been maintained that cognitive and other internal processes are fundamental to the study of behaviour (Skinner 1953.85),it has also been argued that only behavioural aspects of action should be dealt with as it is impossible to know what goes on within the individual.

Purchases may be studied by observation and the consumers own reports,both in terms of past and future intentions,or combinations of aspects and may be used to classify consumers behaviour (Massey et al 1968.86),but considerably less research has been concerned with consumption behaviour than with purchase behaviour (Foote 1966.87;Wilson 1966.88;Pessemier & Tigert 1966.89).

Attempts have been made to measure internal response such as pupil size;foot pressing,dynamic skin responses etc (Advertising Research 1957.90;Lucas & Britt 1963.91) and also changes in knowledge,intentions or attitudes (Cerha 1967.92).
Again because of their character,they are difficult to quantify and in most instances their effects must be inferred from indirect measures (Katona & Mueller 1964.93;Marrow 1969.94).

Simpler decision approaches have been offered to highlight the decision stages which do not elaborate on a multidimensional basis and which are largely similar in content.(Kotler 1984.95;Assael 1984.96) These comprise the stages of problem recognition-information search-evaluation-decision and post-purchase behaviour which make up the central section of the Engel-Blackwell model (1982.97).

Alternative approaches are offered by Howard (1977.98); Buttle (1986.99);Ajzen & Fishbein (1980.100);Bettman (1982.101) and Munch and Hunt (1984.102).All of which may be said to be included in the updated model assembled by Engel,Blackwell and Miniard (1986.103).(See also Venkatesan 1973.104;Raju & Venkatesan 1980.105;McAlister 1982.106;McAlister et al 1984.107).

SUMMARY

Problem solving occurs when a need has arisen and for which the consumer seeks a solution. The degree or extent of the problem is dependent in turn on the desire for,existence of or their persistence in finding a solution. In the main marketingbehaviour has been researched from the actions of the individual - how they respond to motivating forces whose strength andvariety in turn are dependent on and in reaction to both internal and external factors.

The individuals modified behaviour is aggregated in order to arrive at a single conception and by which the seller may prejudge the most likely market response in his favour. The main emphasis has been on extensive problem solving behaviour as by definition, habitual behaviour is repetitive and therefore 'predictable'.

The study of consumer behaviour has as its aim,the understanding of the influencing variables in order to better answer the individual difficulties the consumer may be confronted by during the decision process - not as a weapon to better manipulate the market. Thus we seek to better understand the total process from the original idea generation through to post-purchase behaviour although the consumption process itself has been little studied.

Mass marketing demands mass stimuli and if consumers were found to respond consistently etc,to one or two variables only,the marketers task would be considerably eased. Furthermore,marketers would not be so concerned with what happens during the decision process,but simply its outcome. Just having cause and effect

would be sufficient.

Consumers make frequent decisions,most of which do not end in an actual selection or even decision. It is those decisions with their influencing variables that end in a choice or purchase which are of most interest to marketers.

As a problem solver and information processor,the consumer performs a sequence of steps or passes through a series of stages on route to an end goal. The disparate elements becoming more specific throughout the process,the main influences highlighted, being attitudes and motivation.

Attitudes are central to marketing decision making,the overall measure being made up from a collection of valued attributes from a choice set and which are arrived at as a result of the expected return resulting from a particular behaviour. They assume a certain level of knowledge,providing a background against which chosen elements will be measured and a conative component,or tendency to act in a certain way.

Motivation provides the momentum in the hierarchy of goals. These may be physiological or psychological in origin. Differing goals will give rise to varying individual needs structure and satisfaction,influenced also by perception,past behaviour,social structure and learning etc.

Given the extent and depth of choice,it is perhaps not surprising that a large number of models of consumer behaviour have been proposed,moving from the simple idea of passive man,functioning in response to external stimuli - to cognitive man,as a problem solver.

It would appear that no one single model is capable of representing consumer behaviour in all its complexity. The ideal would be one which stands up under all circumstances and is open to infinite variationand capable of being limited to the least number of variables - sufficient to predict the outcome.

A diagrammatic representation based on psychology,sociology etc may provide theoretical constructs to back various hypotheses;yet only two models;Howard and Sheth and Engel,Kollat and Blackwell have been subject to any testing.

The marketer is responsible for raising the consciousness of the consumer;of the particular product i.e.A.I.D.A.,through mass media,the copy content designed to maximise the concept of involvement. It is necessary to know how and when the decision process begins to react - what are the relevant interactions and the extent of their influence. The success of any media campaign will depend on its ability to 'answer'questions,both conscious and not considered by the consumer,and the value that is placed on them.

The process of search and evaluation will continue provided that it is fruitful or beneficial,but yet still insufficient to provide grounds for a purchase. Priorities may be established at any time (before or during the process),which may lead to 'satisficing',of some sort and so cutting short the process of search.

A realistic concept,similar to that of utility is that of the consumer involving in 'expectant'behaviour,evaluating the future results of an action rather than identifying with the specific action itself,(buying holes rather than the drill bit). In this situation the incoming variables would be gauged to stimulate, reassure,building on product/service positives in the traditional manner.

A common denominator for these models is the acceptance of logical process - input,process,output - best described in the 'balck box' context. However the multi-variable models are obviously more complete,even if they only acknowledge the wider environment and influences on the decision maker,without necessarily measuring their extent.

All models acknowledge that decisions are made in relative ignorance,that it is impossible for the consumer to be aware of all options in order to arrive at a choice. This difficulty is further compounded when dealing with the intangibles of service. Either way it is the strategy outcome that is of interest.

In a dynamic environment,the marketer is interested in purchase behaviour,consumption behaviour and communication behaviour,in order to understand the wider potential for his service,given the need for the establishment for a pattern of behaviour over time. This requires a)establishing a basic model of buyer behaviour and b)a model of aggregated consumer behaviour or market model within which the holistic market will operate. Such an approach is likely to be more sensitive to change in the wider marketing mix and yet still be more responsive to individual consumer needs.

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THE RESEARCH PROBLEM

There are certain things which Ireland can do well,related to its scenery,its culture and its people.Throughout the world, customers know that a quality revolution is occurring.As a result people are more demanding today and less inclined to accept standards which slip below the international norm. Many of the visitors whom we wish to attract here will insist on good hygiene,high quality standards and value for money. Ireland's ratings under all these headings has greatly improved over the last few years,but much remains to be done.
(Martin Dully.1989.1).

Introduction

A theoretical approach may suggest that it is not only possible but also essential that all companies undertake some form of marketing audit in order to be able to present a uniform service, yet one which may be differentiated from competitors. Of particular interest is the marketing characteristics of the various services and the differences in their applied marketing.

The tourism industry is made up of many diverse elements and is subject to differing market forces. An examination of the various marketing practices might yield a comparison of different approaches of service-based companies operating in separate sectors,but within the same broad generic field - tourism.

With this overall objective in mind,the study has a number of specific aims.

1. To see if tourism companies have designed and developed marketing programmes to develop their own service profile
2. To see if tourism companies consider their activities to be successful.
3. To attempt to portray a profile of the industry which may be useful in providing a basis for ongoing structural development of Irish tourism.

As will be seen,for thepurposes of this research,hotels and restaurants are specifically selected,by virtue of their significant representation resulting from the sheer number of establishments and the number of people employed in those companys.

There appears to be an increasing awareness of the advantages of implementing and applying a marketing philosophy to a company's activities. To do so effectively requires the construction of an effective marketing organisation. This entails identifying the needs of the target market and assembling the correct mix of marketing variables,in order to satisfy those needs. Furthermore, the marketing of services in particular,is dependent on service personnel. Such staff require education and training appropriate to their duties and responsibilities,primarily as a consequence of their relationship and interdependence with clients.

Irish companies may be at some disadvantage in their ability to market successfully, particularly because of the small size of individual companies. The industry encompasses approximately 19,000 businesses in every part of the State.(CERT.1987. 2)
A survey conducted in 1988,by the Central Statistics Office, identified a total of 23,010 non-distribution service outlets, which employed a total of 131,428 personnel.(Table 1.1). The second largest sector,regarding personnel, is that comprising 'Hotels & Catering,which numbered 4,047 outlets,employing 33,488 people - 25% of total employment. Taking Hotels & Catering together with Recreational Services,they comprise 6,492 outlets,employing 44,658 personnel,which represents 28% of outlets,employing 34% of personnel. This represents just under 7 persons,on average, per outlet.

Table 1.1: Census of Services,1988.Volume 2.*

Results for Non-distribution Services. (State)

Description of Business	Number of Outlets	Number of Family	Number of Employees Full Time	Part Time	Total	Number of Persons Engaged
Hotels & Catering	4,047	4,897	20,075	8,516	28,591	33,488
Repairs of Consumer Goods	752	728	499	76	575	1,303
Personal Services	3,427	3,378	6,766	1,069	7,835	11,213
Recreational Sers	2,445	1,230	6,941	2,999	9,940	11,170
Real Estate,Renting & Business Services	9,087	8,481	37,o29	11,314	48,343	56,824
Storage,Transport & Communication	2,914	2,185	12,094	148	13,212	15,397
Miscellaneous	338	84	1,819	130	1,949	2,033
ALL SERVICES	23,010	20,983	85,223	25,222	110,445	131,428

*(This Census did not cover Public Sector or Semi-State Bodies,or Banking or Insurance Brokers).

Source:Central Statistics Office.Ref:PL 8587.Jan 1992.

The 23,010 outlets were distributed throughout the country as follows:

Table1.2: Regional Distribution of Services

Location	Number of Outlets	Number of Persons
Leinster	13,459	85,320
(of which Dublin Metropolitan	8,185	60,874)
Munster	6,480	32,655
Connacht	2,005	9,307
Ulster (part)	1,066	4,146
STATE	23,010	131,428

Source:Central Statistics Office.Ref:PL 8587.Jan 1992

From Table 1.2 it can be seen that the greater proportion of both outlets (58%) and personnel employed (65%),nationally,are to be found in the Leinster region.This includes the Greater Dublin Metropolitan area,which comprises 36% of all outlets and 46% of all personnel engaged,nationally. Again the survey did not cover Public Sector or Semi-State Bodies or Banking or Insurance Brokers.

Certain selected industries have been aggregated as representing service business,and presented in Table 1.3. This has enabled the data to be presented in more specific detail.For example,in Table 1.3, 5 service businesses for the whole State of Ireland have been classified according to the number of persons engaged. Again Hotels & Catering are a primary employer,employing,on average 8.3 people per outlet,against a national average for the 5 businesses of 5.7 people per outlet.

Table 1.3. Estimated Number of Outlets and Persons engaged in 5 Service Businesses,Classified by Number of Persons engaged for the State.

Description of Business	Number of Outlets	%	Number of Persons	%	Average for Business
Hotels & Catering	4,047	18	33,488	25	8.3
Personal Services	4,179	18	12,516	10	3.0
Recreational Services	2,445	11	11,170	9	4.6
Real Estate,Renting & Business Services	9,087	39	56,824	43	6.3
Storage,Transport, Communication & Misc.	3,252	14	17,430	13	5.4
STATE	23,010		131,428		5.7

Source:Central Statistics Office.Ref:PL8587.Jan 1992.

Further analyses of the data in the survey illustrate the low numbers of personnel employed per outlet. For example,Tables 1.4 and 1.5 indicate that 5,892 outlets (25.6%),employ only one person and that 77% of these people are either Proprietors and/or family workers.Furthermore,just over 71% of companies (within the terms of the survey),employ 4 or fewer persons(26% of all employed,Table 1.6). Perhaps it may be inferred that there is limited scope for outside recruitment,when it is seen that of the 23,010 outlets considered, 16% of those employed overall,were either proprietors or family members,65% were full-time employees,whilst 19% were part-time employees. Another way of appreciating the problem of employment is to consider that only just over 28 per cent of those outlets surveyed,employed over 5 persons while only 1 per cent employ 50 or more persons.(Table 1.5)

Table 1.4:Estimated Number of Outlets and Persons engaged in 5 Service Businesses in the State,Classified by Number of Persons engaged for all Services.

Number of Persons Engaged	Number of Outlets	Number of Proprieters/ Family	Number of Employees Full-Time	Number of Employees Part-Time	Total
1 Person engaged	5,892	4,515	1,139	238	5,892
2 Persons "	5,102	4,813	4,341	1,050	10,204
3 " "	3,214	3,236	5,125	1,281	9,642
4 " "	2,233	2,278	5,398	1,256	8,932
5 - 9 " "	4,012	3,922	17,827	3,947	25,696
10-14 " "	1,115	1,025	9,876	2,012	12,913
15-19 " "	483	385	6,295	1,386	8,066
20-49 " "	685	469	15,501	3,868	19,838
50 or more "	274	340	19,721	10,184	30,245
TOTAL	23,010	20,983	85,223	25,222	131,428

Source:Central Statistics Office,Census of Services.Jan 1992

Table 1.5:Estimated Number of Outlets and Persons engaged in 5 Service Businesses classified by Number of Persons engaged for the State.*

Number of Persons Engaged	Number of Outlets	Cumulative Freq.	Cum %
1 Person engaged	5,892	5,892	25.6
2 Persons "	5,102	10,994	47.8
3 " "	3,214	14,208	61.7
4 " "	2,233	16,441	71.5
5 - 9 " "	4,012	20,453	88.9
10-14 " "	1,115	21,568	93.8
15-19 " "	483	22,051	95.8
20-49 " "	685	22,736	98.9
50 or more "	274	23,010	100.0

*Classified for Hotels and Catering;Personal Services - including Repairs;Recreational Services;Real Estate,Renting & Business Services;Storage,Transport,Communication and Misc.Services(Private Sector).

Source:Central Statictics Office.1988 Census of Services.Vol.2 PL 8575. Jan 1992.

Table 1.6:Estimated Number of Persons engaged in 5 Service Businesses,classified by Number of Persons engaged (State)

Number of Persons Engaged	Total Employed	Cumulative Freq.	Cum %
1 Person Employed	5,892	5,892	4.4
2 Persons "	10,204	16,096	12.2
3 " "	9,642	25,738	19.6
4 " "	8,932	34,670	26.4
5 - 9 " "	25,696	60,366	45.9
10-14 " "	12,913	73,279	55.8
15-19 " "	8,066	81,345	61.9
20-49 " "	19,838	101,183	77.0
Over 50 "	30,245	131,428	100.0

Source:Central Statistics Office.Ref:PL8575.Jan 1992.

Services in Dublin.

Taking the Dublin Metropolitan Region,as having the dominant market share (Table 1.2),the Survey has been analysed under similar criteria and from which it appears that there is a concentration of service businesses,but also including those unrelated to the specific area of interest,namely - tourism. For example,the proportion represented by 'Hotels and Catering' is 13 per cent of outlets in Dublin,as against 18 per cent of outlets for the State. Furthermore 'Business Services etc',represent 51 per cent of outlets in Dublin,as against 39 per cent for the State. So with the exception of 'Real Estate etc',the categories have a reduced percentage when compared with nationwide or State representation. In the Dublin Metropolitan Region,'Real Estate etc' accounts for the largest number employed.(Table 1.7)

Table 1.7:Estimated Number of Outlets and Persons engaged in 5 Service Businesses Classified by Number of Persons engaged in the Dublin Metropolitan Region (incl.Suburbs)

Description of Business	Number of Outlets	% Dublin	% State	Number of Persons	% Dublin	% State	Average Number
Hotels & Catering	1,041	13	18	10,761	18	25	10.3
Personal Services	1,218	15	18	4,731	8	10	3.9
Recreational Services	760	9	11	4,435	7	9	5.8
Real Estate,Renting & Business Services	4,158	51	39	33,112	54	43	8.0
Storage,Transport, Communications & Misc.	1,008	12	14	7,835	13	13	7.8
Dublin Area - Total	8,185		36	60,874		47	7.4

Source:Central Statistics Office.1988 Census of Services.Vol 2 PL 8575.Jan 1992.

It is perhaps only to be expected that as the commercial centre of the country,that there would be greater numbers and hence representation of businesses other than those involved in tourism ,but still the first three categories(which may be said to more specifically symbolise the tourism - services industry),together make up almost half of the services industry in the Dublin Metropolitan Region.

If the size of outlet in Dublin is compared,(as measured by numbers of personnel,(Table 1.8).22 per cent of companies employ only one person and 75 per cent of these are likely to be either a proprietor or family worker.(Table 1.8). There are 8,185 outlets employing a total of 60,874 persons. 6,467 or 10 per cent of these are proprietors and family workers,70 per cent,full-time whilst 20 per cent are part-time employees.

Table 1.8:Estimated Number of Outlets and Persons engaged in 5 Service Businesses in the Dublin Metropolitan Region, Classified by Number and Number of Persons engaged for all services. Source:C.S.O.Census of Services.PL8575.1992.

Number of Persons Engaged	Number of Outlets	Number of Proprieters/ Family	Number of Employees Full-Time	Part-Time	Total
1 Person Engaged	1,825	1,361	417	47	1,825
2 Persons "	1,667	1,370	1,647	317	3,334
3 " "	1,138	968	2,015	431	3,414
4 " "	808	642	2,190	400	3,232
5 - 9 " "	1,570	1,097	7,697	1,288	10,082
10-14 " "	473	329	4,509	614	5,452
15-19 " "	333	238	8,161	1,356	9,755
50 or more "	156	294	12,798	7,070	20,162
TOTAL –	8,185	6,467	42,420	11,987	60,874

In the Dublin region,the numbers engaged per outlet is also small, for example 66 per cent of companies in Dublin engage 4 or less employees,whilst only 2 per cent engages 50 or more employees. The frequency percentages of companies within the first or lower class intervals are lower in the Dublin region,suggesting that individual businesses are likely to employ more personnel than for the state as a whole.This is only reasonable,given the size of the resident population in Dublin and again the strategic importance of the capitol as a port of entry for the tourist and the service industry as a whole.(Table 1.9).

Table 1.9:Estimated Number of Outlets and Persons engaged in 5 Service Businesses,classified by Number of Outlets engaged for the Dublin Metropolitan Region.

Number of Persons Engaged	Number of Outlets	Cumulative Frequency	%
1 Person Engaged	1,825	1,825	22.2
2 Persons "	1,667	3,492	42.6
3 " "	1,138	4,630	56.6
4 " "	808	5,438	66.4
5 - 9 " "	1,570	7,008	85.6
10-14 " "	473	7,481	91.4
15-19 " "	215	7,696	94.0
20-49 " "	333	8,029	98.1
50 or more "	156	8,185	100.0
TOTAL	8,185		

Source:Central Statistics Office,1988 Census of Services.Vol 2 PL8575.Jan 1992.

Table 1.10:Estimated Number of Persons Engaged in 5 Service Businesses,classified by the number of persons in the Dublin Metropolitan Region.

Number of Persons	Number in each Group	Cumulative Frequency	%
1 Person Engaged	1,825	1,825	3
2 Persons "	3,334	5,159	8
3 " "	3,414	8,573	14
4 " "	3,232	11,805	19
5 - 9 " "	10,082	21,887	36
10-14 " "	5,452	27,339	45
15-19 " "	3,618	30,957	51
20-49 " "	9,755	40,712	67
50 or more "	20,162	60,874	100

Source:Central Statistics Office.1988 Census of Services.Vol 2. PL 8575. Jan 1992.

The estimate that employment within service companies,in the Dublin area,tends to be marginally larger than that for the State as a whole,is reflected also in Table 1.10. For example, the number employed in businesses of one person only,represents 3 per cent in Dublin,compared with 4.4 per cent for the State. The differences become even greater,as company size becomes larger,i.e.33 per cent of personnel in Dublin,are employed in companies comprising 50 or more people,compared with 23 per cent for the whole State (over the 5 Service businesses).

Summary

The Irish services industry is made up predominantly of small businesses,as regards numbers employed. The greater proportion,at 43 per cent,being employed in 'Real Estate,renting and business services. The second largest sector,'Hotels and Catering making up 25 per cent of total employed. When taken with Recreational Services,this latter figure increases to 34 per cent of personnel working in 28 per cent of outlets.

Of particular significance is the small numbers of personnel employed within each business,(nearly 75 per cent employ four or fewer persons and that 16 per cent were either proprietors or family members). Only one per cent of companies employ 50 or more persons,both as regards the Dublin area or nationwide.

Although most businesses and personnel are to be found in the greater Dublin area,of those companies which comprise the tourism industry,a slightly greater proportion is to be found outside the Dublin area.

In Dublin,22 per cent of companies employ only one person,of which 75 per cent are likely to be a proprietor or family worker,but individual companies are likely to employ more personnel,than for the State,as a whole.

The result is that the Dublin area represents the tourism and services industry as a whole,within a reasonably concentrated area. Either way,a large proportion a small businesses persists, whose personnel would of necessity be required to perform many separate tasks,whether marketing or otherwise.

THE TOURISM INDUSTRY

There are in fact no areas that are exclusively 'in tourism'. The main thrust of a hotels' activities may be towards the tourism market but more than likely it will also rely on domestic conferences and upon local bar and restaurant business.Car rental companies will lease cars to residents for non-holiday use. Air and sea services depend as much on freight and business traffic as on holiday makers.Nor do official employment statistics recognise tourism as a separate activity and hence,as a separate source of jobs.This is a unique activity in that it cannot be isolated by looking at the goods or services it provides.It is a common activity whose effects are spread across a wide range of industries. (CERT.1987.2).

This section outlines the research problem.
It also introduces the industrial area selected and its importance to the Irish economy.

This study involves an examination of particular emphases placed by companies on marketing practices, in Ireland. The research area of concern is the marketing of services as applied to Tourism. This involves surveying the main categories that together are considered to represent the wide range of activities and operations which make up the tourism product in Ireland.

A number of surveys have been undertaken into various separate industries, i.e. services, in general and particular sectors which are comprised in the tourism industry. In particular employment in Hotel and Catering, in Non-Food Accommodation and also in the Leisure industry.
The main emphasis has been on the nature of employment, as well as economic value to the State. Although some research has been conducted on visitor and employee profiles in the areas as listed, little has been done regarding coverage of a sample of all businesses, which together may be said to comprise services, and especially tourism.

This research attempts to develop a profile of the tourism industry as a representative of services in Ireland in general by presenting 1.a marketing profile,2.the extent of customer orientation,3.the companies ability to provide the service, (from the companys point of view),4.its degree of competitiveness and 5.its perceived success (or failure).

As will be seen,the structure of the Irish economy and its dependence on services,alongside the increasing opportunities for leisure pursuits,has suggested the need for certain sectors within tourism,to align themselves along lines in keeping with consumer demands.

The role of tourism in the economy is well recognised by Government,who set out a major five year target for the industry. It appears this target is optomistic,given the extent of global competition and economic downturn.

There is considerable emphasis on personnel input at all levels of industry,with a view to identifying strengths and weaknesses and hence their ability to match the various demands that may be placed on them,by their clients.

The Tourism industry is currently undergoing change and development at a rate unprecedented in its history.
The National Development Plan 1989-1993,published in March 1989, contained proposals for tourism infrastructural development comprising a total investment by the Government,European Community and the private sector of at least £300 million.The European Regional Development Fund is contributing £118.4 million and the European Social Fund an additional £28.5 million.The European Regional Development Fund is being matched by £17 million from public bodies and at least £120 million from the Private sector. Ireland competes with over 70 other destinations for its share of world tourism,so the development of a larger and more attractive range of better-value product has to be the foundation for this growth.(Bord Failte.1991.3).

It is estimated that the world tourism industry will be worth about IR£1,500 billion by 1995. A 1987 report "Tourism Study - Tourism Industry Policy Committee",by Stokes Kennedy Crowley, commissioned by the Irish Hotels Federation,was first of many to point out that Irish Tourism had the potential to be doubled over the space of 5 years.
In October of 1987,the Government set out the target of doubling tourism numbers from 2.1.million to 4.2 million over the period 1988-1992.This was to be accompanied by an increase in overseas revenue of IR£500 million and a consequent increase of 25,000 jobs in the sector.

To achieve this requires an annual compound growth rate of 15 per cent,as compared with an annual average growth in real Irish overseas tourism earnings of only 2.36 per cent over the decade 1976-1986.

Given forecasts that suggested that international tourism would expand 5 per cent per year until the mid to late 1990's,these targets imply an immense improvement in performance that are three times above the international average.(Bord Failte.1989.4)

The problems faced by the Irish tourism industry are aggravated by the difficulties inherent in the marketing of services;the traditional attitudes or limited appreciation of managers to the advantages of applied marketing;the location of Ireland on the periphery of Europe;the traditional dependence of Irish industry on the United Kingdom;the large proportion of Irish companies which are foreign subsidiaries;a low service base;dependence on agriculture rather than industry.(Regional Profile.1990. 5)

Tourism - Value to the Irish Economy

The tourism product encompasses a wide range of goods and services throughout a number of economic sectors,often overlooked.These include agriculture,retail and distribution,food and drinks, transport and personal services such as hairdressing etc.
For example,according to Bord Failte,if only 20 per cent of the 3 million visitor days here in 1988,had only one steak,they would account for 21,000 beef cattle or eight per cent of the beef herd slaughtered for domestic consumption.

Assuming those visitors staying in accommodation such as guesthouses, farmhouses etc,(excluding self-catering),used two rashers a day for breakfast,would be equivalent to over 100,000 pigs. Given the broad use of eggs in the diet,consumption of eggs equivalent to 156,000 battery hens,(10 per cent of the national flock of 1.7 million hens),would be accounted for by tourists.
When visitors travel abroad,a high percentage will make a journey by taxi.It is estimated that approximately 1.3 million taxi trips

are made,at a minimum of a half-hour journey each. This is equivalent to one year's employment of over 320 taxi drivers, working five,eight hour days,per week,for fifty weeks of the year. A substantial percentage of women visiting Ireland will pay a visit to the hairdresser in the course of their average 11 day trip. Bord Failte assume that 75 per cent of female visitors paid one visit to the hairdresser,thus supporting employment for over 170 hairdressers,(excluding male visitors).
In entertainment,it is estimated that overseas visitors alone would more than keep a 350 seat theatre booked to capacity for over one year of nightly performances.(Bord Failte.1989.4).

Tourism contributes to the national economy in a number of ways. Primary among these are contribution to Gross Domestic Product, Foreign Exchange and Employment.(Table 1.11a)

Table 1.11a: Economic Benefits from Tourism.

	1985	1986	1987	1988	1989	1990
Benefits (IR£M)						
Earnings (Total)	960.2	865.6	1,013.7	1,153.0	1,319.9	1,551.7
Out of State	691.0	649.0	723.0	842.0	991.0	1,139.0
Domestic	269.2	216.6	290.7	311.0	328.9	412.7
Foreign & Domestic Tourist Expenditure (% of G.N.P.)	6.2	5.3	5.7	6.2	6.5	6.8
(+ multiplier effect)	8.7	7.5	8.3	na	na	na
Percentage of all Exports	6.4	6.3	6.7	6.8	6.8	7.1
Employment (000's)	na	91	63	69	75	82

Source:Tourism Facts.1985 - 1990.Central Marketing Dept.Bord Failte.

Table 1.11a,summarises the economic benefits to the State between the years 1985 to 1990. With the exception of 1986,the trend has been upwards,with 'Out of State' earnings running approximately 10 per cent higher than 'Domestic' earnings. As a percentage of Gross National Product,contribution has gone from 6.2 per cent in 1985 to 6.8 per cent in 1990,while taken as a percentage of all exports,has resulted in an increase from 6.4 per cent in 1985 to 7.1 per cent in 1990.
A significant proportion of foreign tourism spending within Ireland goes to the exchequer via various taxes and charges, resulting in a net benefit to the exchequer of 50p for every IR£(pound) spent.Furthermore,unlike many export (and domestic) oriented industries,tourism does not have to import much raw material, so that the direct import requirement of tourism is low.Also, in many instances,tourism attractions and activities are located in areas of the country which otherwise are economically under-developed and unsuited for significant agricultural or industrial development. Tourism therefore helps distribute income and associated jobs to such areas,helping to provide employment and to improve the quality of life for those living there.(Bord Failte.1989.4).

Tourism is a major employer in the State and employment is one of the prime objectives set for the industry. According to the data presented by Bord Failte,the numbers overall have declined somewhat,however,"comparisons should not be taken too literally as over the years,more rigerous models are being applied to employment equivalents,and the criteria for calculating full-time equivalents has changed over time."(Brian Deane.1992.6).

As a supporter of employment - at current rate of growth, the Irish Government projects tourism will provide 25,000 extra jobs by the end of its five year programme in 1992. In contrast, in 1990 approximately 82,000 jobs were supported by tourism (11 per cent of service sector employment).

Table 1.11b : Employment in Tourism-Related Services.

Year	1987	1988	1989	1990	1991	1992
No.of Jobs	63,500	69,000	75,000	82,000	N/A	95,000(projected)

Source:Bord Failte Reports 1989-1991.

This five year programme to double out of state tourism numbers from 2.1 million to 4.2 million requires a cumulative growth rate of 15 per cent per annum.(Seamus Brennan.1991.6)

This achievement so far has been impressive as the table below indicates.

Table 1.12: Tourism Numbers and Revenue.

Overseas/Foreign	1986	1987	1988	1989	1990
Nos.(000,s) (Over 1 day)	1,881	2,098	2,425	2,804	3,096
N.Ireland (Over 1 day)	586	566	582	680	570
TOTAL	2,467	2,664	3,007	3,484	3,666
Revenue (IR£M)	476.2	543.1	639.9	743.8	865.8
Excursionists Rev.	15.8	20.9	15.1	10.2	10.2
Carrier Receipts	157.0	167.0	186.0	237.0	263.0
TOTAL FOREIGN EXCHANGE EARNINGS	649.0	731.0	841.0	991.0	1,139.0

Source:Tourism Facts.1990.Central Marketing Dept.Bord Failte. June 1991.

That the tourism market has shown a continued increase over the period 1986 - 1990 (1991 is not yet available),may be seen from table 1.12. The actual total has risen from 2,467,000 to 3,666,000 resulting in a revenue inflow of IR£M 649 to IR£M 1,139 in 1990. The numbers from Northern Ireland show a slight reduction of 16,000.The reason for this is not clear,as it may be due to more tourists coming directly,rather than through a Northern Ireland port.

Table 1.13: Domestic Tourism Numbers and Revenue

Year	1986	1987	1988	1989	1990
Home Holidays (000,s)	1,355	1,828	2,365	2,645	3,596
Other Domestic (Non-business trips)	1,876	2,661	1,799	2,415	1,469
REVENUE					
Home Holidays (IR£M)	135.6	168.7	216.7	246.4	341.8
Other Domestic	81.0	122.0	94.4	84.5	70.9
TOTAL DOMESTIC	216.6	290.7	311.1	330.9	412.7

Source:Tourism Facts.1990.Central Marketing Dept.Bord Failte. June 1991.

The growth in domestic tourism has been considerable in terms of both numbers and revenue.As will be seen later,no allowance is made for business trips in the surveys and the figures for day trippers are nominally adjusted by Bord Failte from surveys produced by the Central Statistics Office.Taken at face value, they indicate a considerable 'captive' market which could be further developed at the expense of revenue lost by those Irish travelling abroad.(Table 1.21).

Adding together the earnings from both overseas and domestic tourism,the following table results.

Table 1.14. Total Revenue from Overseas and Domestic Tourism.

Year (IR£M)	1986	1987	1988	1989	1990
Overseas	649	731	841	991	1,139
Domestic	217	291	311	331	413
TOTAL	866	1,022	1,153	1,320	1,552

Thus over the five year period,revenue has almost doubled (an increase of 75 per cent for overseas and 90 per cent for domestic revenue).

Source:Tourism Facts.1990.Bord Failte

The figures for overseas/foreign visitors,include all visitors from all destination,who stay in Ireland for over one day.As indicated,they show an overall increase,the route chosen and area of residence has undergone change over the five year period.

Table 1.15

Estimated Number of Visits Classified by Route of Travel

Period	Total (000's)	Route of Travel Cross Channel Air	Sea	Continental European	Trans - Atlantic
1986	1,813	578	800	242	193
1987	2.039	768	787	272	212
1988	2,345	998	824	310	214
1989	2,732	1,207	921	383	221
1990	3,069	1,352	1,005	497	215
1991	2,990	1,192	1,060	569	170

Source: Central Statistics Office.January 1992.

With the exception of the period 1990 - 1991,when the total number of visitors fell by 72,000,there has been a consistent increase of over 300,000 visitors per annum. There was a greater increase in the numbers travelling cross-channel by air than by sea.The greatest increase was the number travelling from continental Europe,but of course from a much lower base.The only source to show any decline was that of'trans-atlantic! This reduction is borne out by the numbers stating their 'Area of Residence' as in Table 1.16.

Table 1.16 Estimated Number of Visits,Classified by Area of Residence

Period	Total (000's)	Area of Residence Great Britain	Other Europe	U.S.A.& Canada	Other
1986	1,813	1,084	326	327	76
1987	2,039	1,209	382	383	66
1988	2,345	1,465	398	401	82
1989	2,732	1,668	538	417	109
1990	3,069	1,786	731	434	118
1991	2,990	1,722	824	342	102

Source: Central Statistics Office.January 1992.

Those numbers of visitors from Great Britain showed a considerable increase,even allowing for the drop of 64,000 estimated between 1990 and 1991.There has been some increased activity directed towards Continental Europe,by Bord Failte'which is not qualified in this report'does appear to indicate a development away from the perceived traditional market of North America.

The importance of the British market may be gauged from the figures in Table 1.16, where it may be seen that the numbers of British visitors account consistently for approximately half of all visitors, those from Europe for one fifth. The data does not necessarily mean that the American market itself is in decline, as it has actually shown a slight increase. An alternative may be that a greater number of visitors from North America may be arriving via a European port, rather than directly as well as the actual number of European visitors also showing an increase in real terms.

In terms of revenue generation, a similar profile is presented, with greater dominance of one market overall. For example, in 1990, Great Britain generated 38 per cent of the 'out of state' tourism figure of IR£M 866, Mainland Europe generating 29 per cent. By contrast, revenue developed from the domestic market stood at 26 per cent of the total, at just under IR£M413. (Table 1.17).

Table 1.17. Tourist Revenue as a Percentage of Annual Totals, Classified by Area of Residence.

Revenue (IR£M)	1986 %	1987 %	1988 %	1989 %	1990 %
Great Britain	39	39	42	41	38
North America	29	29	26	24	19
Europe	19	19	19	21	29
Other	5	5	6	6	6
N.Ireland	8	7	7	8	8
Total Foreign Exchange	649	731	841	991	1,139
Domestic	217	291	311	331	413
TOTAL REVENUE	866	1,022	1,152	1,322	1,552

Source: C.S.O. January 1992.

Table 1.18 illustrates the extent of holidaytaking by Irish residents and its value as a revenue generator.

Table 1.18.Holidaytaking by Irish Residents - Domestic.

Total Holidays (000's)	1987	1988	1989	1990
Home Long Holidays (4+ Nights)	917	1,118	1,294	1,692
Revenue(IR£M)	107.9	124.4	150.1	204.6
Home Short Holidays (1 - 3 Nights)	911	1,244	1,351	1,901
Revenue(IR£M)	60.8	92.3	96.3	137.2
Total Holidays	1,828	2,362	2,645	3,593
Total Revenue (IR£M)	168.7	216.7	246.4	341.8

Source:Tourism Facts 1990.Central Marketing Dept.Bord Failte

The figures suggest that there is a marginally greater increase for shorter term holidays or alternatively,that the same market is indulging in more frequent home short holidays.

However a large number of holidays abroad are taken by Irish residents,Table 1.19.

Table 1.19.Holidaytaking by Irish Residents - Abroad.

Number of Holidays	1987	1988	1989	1990
	1,069	1,203	1,162	1,034
Revenue (IR£M)	448.7	513.5	481.8	447.7

Source: Tourism Facts 1990.Central Marketing Dept.Bord Failte.

The average spend per head of Irish resident,holidaying in Ireland shows a very slight increase for both long and short holidays.

Table 1.20. Average spend by Irish Residents Holidaying in Ireland

	1987	1988	1989	1990
Home Long Holidays (4+ Nights) IR£'s	118	111	116	121
Home Short Holidays (1 - 3 Nights)IR£'s	92	92	93	95

Source:Tourism Facts 1990.Central Marketing Dept.Bord Failte.

By comparison the spend per head of Irish residents holidaying abroad has shown an increase of just over 3 per cent.(Table 1.21)

Table 1.21. Average spend by Irish Residents Holidaying Abroad

	1987	1988	1989	1990
Average Spend IR£'s	420	427	415	433

Source:Tourism Facts 1990.Central Marketing Dept.Bord Failte.

Taking Tables 1.19 and 1.21 together,the overall revenue spent by Irish holidaying abroad has remained almost exactly the same, the number who travelled actually fell by 35,000,(3.2%).

The real value of tourism in net terms may be seen in Table 1.22, which compares earnings from all visitors to Ireland,with expenditure by the Irish abroad.

Table 1.22. Net Earnings from Tourism

Total Tourism Revenue	1987	1988	1989	1990
(incl.Domestic Trips, Non-business)	1,021.7	1,153.1	1,321.9	1,151.7
Holidays Abroad	448.7	513.5	481.8	447.7
Net Revenue	573.0	639.6	840.1	704.0

Source:Tourism Facts.1990.Central Marketing Dept.Bord Failte.

Thus in effect the net return to the State of such changes in revenue have in effect meant an increase of of IR£M 131 between 1987 and 1990. However this hides the sharp decline from a high of IR£M 840.1 in 1989 to IR£M 704 in 1990.Although there was some saving resulting from the drop in expenditure by the Irish abroad, this was sufficient to counteract only 20 per cent approximately of the decrease in revenue from overall tourism.

The data produced by the Central Statistics Office do not exactly match those produced by Bord Failte.The reason for this is that they are collected as the result of two sample surveys of passengers, namely the Country of Residence Survey and the Passenger Card Enquiry,which are carried out at major air and sea ports. These are used in conjunction with passenger movement figures supplied by the transport companies,to provide estimates for overseas tourism and travel. Bord Failte use these surveys,making their own adjustment for overseas visitors and to include an estimate for visitors from Northern Ireland.For example only carriers such as coach operators are surveyed and so estimates must be made for private car travellers.As far as revenue is concerned,a notional base year of 1960 may be taken,but the figures shown are in current terms and do not include any factors or multipliers for inflation or otherwise.(Brian Maher.1992.8).

Survey of International Travellers

Bord Failte's survey of International travellers monitors traffic flows through various ports of entry to the Republic,excluding cross-border traffic,on a continuous basis. Personal interviews are conducted with travellers in order to monitor visitor trip characteristics. This survey has been ongoing on a continuous basis since 1972.

Holidaytaking by Irish Residents

This survey is undertaken annually,in order to establish the extent and nature of holidaytaking by residents of the Republic of Ireland. This information is gathered by means of a household survey,involving 3,000 interviews carried out during the latter part of the year under review.

Information on Northern Ireland resident trips to the Republic is supplied to Bord Failte by the Northern Ireland Tourist Board. Prior to 1989 this information was supplied from the annual Survey of Holidaytaking by Northern Ireland residents.(Bord Failte.Trends,1991.9)

Although the number of visitors has shown an increase overall, and that each market has shown an increase,a more definitive comparison may be made by comparing the average spends over the period.

Table 1.23: Average spend classified by Area of Residence

Area/IR£	1986	1987	1988	1989	1990
Gt.Britain	164	173	177	178	186
N.America	409	398	395	415	376
Mainland Europe	261	271	303	292	335
N.Ireland	68	68	79	85	123

TABLE 1.24:

Average of Overseas (Over 1 day)	232	240	245	245	257
Overall Average (Out of State Tourists)	193	204	213	213	236
Home Holidays	100	92	92	93	95
Other Domestic Trips	43	46	52	35	48

Source:Bord Failte Trends.Central Marketing Dept,Bord Failte.1991

It would appear from the table that on average the American tourist is worth,or spends over twice that of the equivalent British visitor and that visitors from Mainland Europe have increased their spend by 28 per cent overall.

The main reason for the difference in average spend is as a result of the length of stay in Ireland.(Table 1.24)

Table 1.27: Timing of overseas Visitors.

Arriving in.	Total Overseas %	Britain %	Mainland Europe %	North America %	Other Areas %
Jan-Mar	16	19	12	11	7
April	7	7	8	6	4
May	9	8	7	13	14
June	12	11	13	16	17
July	16	13	23	14	20
August	14	14	16	13	9
September	10	10	8	12	12
Oct-Dec	16	18	13	15	17

Source:Tourism Facts 1990.Bord Failte.

The percentage of individuals travelling alone has shown a slight increase.Between 1985-1989,(the latest figures on record),the percentage of visitors travelling alone increased from 42 per cent to 48 per cent. The proportion of'Mixed Couples'has fallen from 26 per cent to 22 per cent and'Familys with children'from 12 per cent to 10 per cent.(Table 1.28).

Table 1.28: Visitor Characteristics;All Overseas Visitors (%)

Party Composition	1985	1896	1987	1988	1989	1990
Travelling Alone	42	48	49	47	48	N/A
Mixed Couple	26	23	23	24	22	"
Family with Children	12	11	10	10	10	"
Other Adult Party	20	19	18	19	20	"

Source:Bord_Failte Trends 1982-1990,Central Marketing Dept.

In terms of social class, there has been little change over the past five years according to C.S.O. statistics, however the age of visitors has undergone change, primarily in the 25 - 34 age group (up 4 per cent) and also 45+ years (down 34 per cent). Unfortunately one can only speculate as to the effect these changes may have as to the nature of demand placed on businesses within the tourism network. (Table 1.29).

Table 1.29: Visitor Characteristics - All Overseas Visitors (%)

Party Ages	1985	1986	1987	1988	1988	1990
Less than 18 yrs	12	11	10	11	13	12
19 - 24 "	12	12	11	13	13	14
25 - 34 "	18	19	20	21	20	22
35 - 44 "	19	19	19	18	18	18
45+ Years	40	38	40	37	36	34

Source: Bord Failte Trends. 1982 - 1990. Bord Failte.

As may be expected, a large proportion of visitors stayed at least one night in Dublin (41 per cent), the next most popular regions being Cork/Kerry (33 per cent), with little difference between the West (27 per cent) and Mid-West (25 per cent). These statistics further substantiate the importance of Dublin to tourism in Ireland. (Table 1.30).

Table 1.30: Regions Visited - Stayed at least one Night.

All Overseas Visitors (%)

Region	1985	1986	1987	*1988	*1989	*1990
Dublin	38	39	38	42	42	41
East/Midlands	15	14	14	15	16	16
South-East	23	21	20	19	18	21
Cork/Kerry	38	34	35	34	32	33
Mid-West	24	23	23	26	25	25
West	24	23	28	23	28	27
Donegal/Leitrim/ Sligo	10	9	10	11	12	11
Midlands	11	11	10	-	-	-

*Indicates distribution of visits on the basis of new E.C.defined regional boundaries,(including suburbs).

Source:Bord Failte Trends,1982-1990.Bord Failte.

The final table considered from the Bord Failte reports covers satisfaction and value for money.(Table1.31a&b)Taking the figures again at face value,they would suggest that as the level of 'complete' satisfaction has increased by 5 per cent,whereas those 'very' satisfied,has fallen by the same percentage,that it is a matter of conjecture as to what the satisfaction actually seeks to measure.

Table 1.31a.Satisfaction,Value for money.
All overseas visitors (%)

Satisfaction with Holiday	1985	1986	1987	1988	1989	1990
Completely Satisfied	42	36	37	46	47	N/A
Very "	50	54	58	47	47	"
Fairly "	6	8	5	6	7	"
Not Very "	1	1	1	1	1	"
Not at all "	-	-	-	-	-	"
Value for Money Table 1.31b.						
Very Good	10	4	3	5	7	9
Good	29	23	20	26	33	48
Fair	33	36	35	36	35	28
Poor	21	27	32	29	22	12
Very poor	7	10	9	5	4	2

Source:Bord Failte Trends,1982-1990.Bord Failte.

The second table 1.31b,considers value for money and suggests that there has been a considerable increase in perceived 'good' value for money (from 29 per cent to 48 per cent).There also appears to have been a reduction in those who considered they fair,poor or very poor value overall.

Again it is difficult to know exactly what the nature of the topic is that the tables seek to measure,particularly with such a subjective, emotive topic.

Summary

The value of the tourism industry to the Irish economy has increased marginally over the period 1985-1990. A net benefit of 50p in every IR£ spent accrues to the Exchequer,with little outgoings on imported raw materials;this on top of the value of tourism as a major employer.

Tourism numbers have shown an increase,with a continuous drift towards Continental Europe,as well as a growth in domestic tourism.

Nearly 50 per cent of all foreign visitors to Ireland come from Great Britain and Northern Ireland,subscribing to nearly half of all revenue generated.

Holidays are tending to be shorter in duration,but taken more frequently.

Foreign holidays taken by the Irish have fallen to their 1987 figure,but were insufficient to counteract the drop in revenue between 1989 and 1990.

Nearly 50 per cent of all visitors were 'travelling alone', arriving during the summer period,but also in the winter,possibly as a result of returning Irish or visiting friends or relatives. They are aged mainly 40 plus years and will spend at least one night in Dublin.

Irish Tourism at present.

According to Brian Deane there are four dominant factors that determine demand for Irish tourism and these will be particularly influential in 1992,viz:

1.The level of income in the generating markets.

2.The competitiveness of Irish tourism.

3.The overall attractiveness and availability of the Irish tourism product.

4.The marketing of Irish tourism in respect of its coverage.

"The latter three are in effect concerned with market share as product offering and marketing effectiveness determine the market share that Ireland will obtain. These are within the industries' sphere of influence,since they are dependent on decisions made within Ireland"(Brian Deane.1992.6).

So it is up to the components of the industry,individually and collectively,to successfully generate and satisfy demand within their own particular areas of expertise and influence.

The main categories on which visitor satisfaction depends(in the Irish context)comprise six product areas.These are accommodation, food,activity and special interest facilities,night entertainment, transport and visitor services.Together these form the basis from which the future of Ireland's tourism industry has been planned.(Matt McNulty - Bord Failte.1992.13).

According to Middleton, there are five main sectors into which travel and tourism may be classified. These include:

Accommodation	Attractions
Hotels, Guesthouses, Farmhouses	Theme Parks
Apartments/Villas/Flats	Museums
Condominium/Time Share	National Parks
Vacation Villages	Wildlife Parks
Conference/Exhibition Centres	Gardens
Static & Touring/Camping Sites	Heritage Sites
Marinas	

Transport Sector

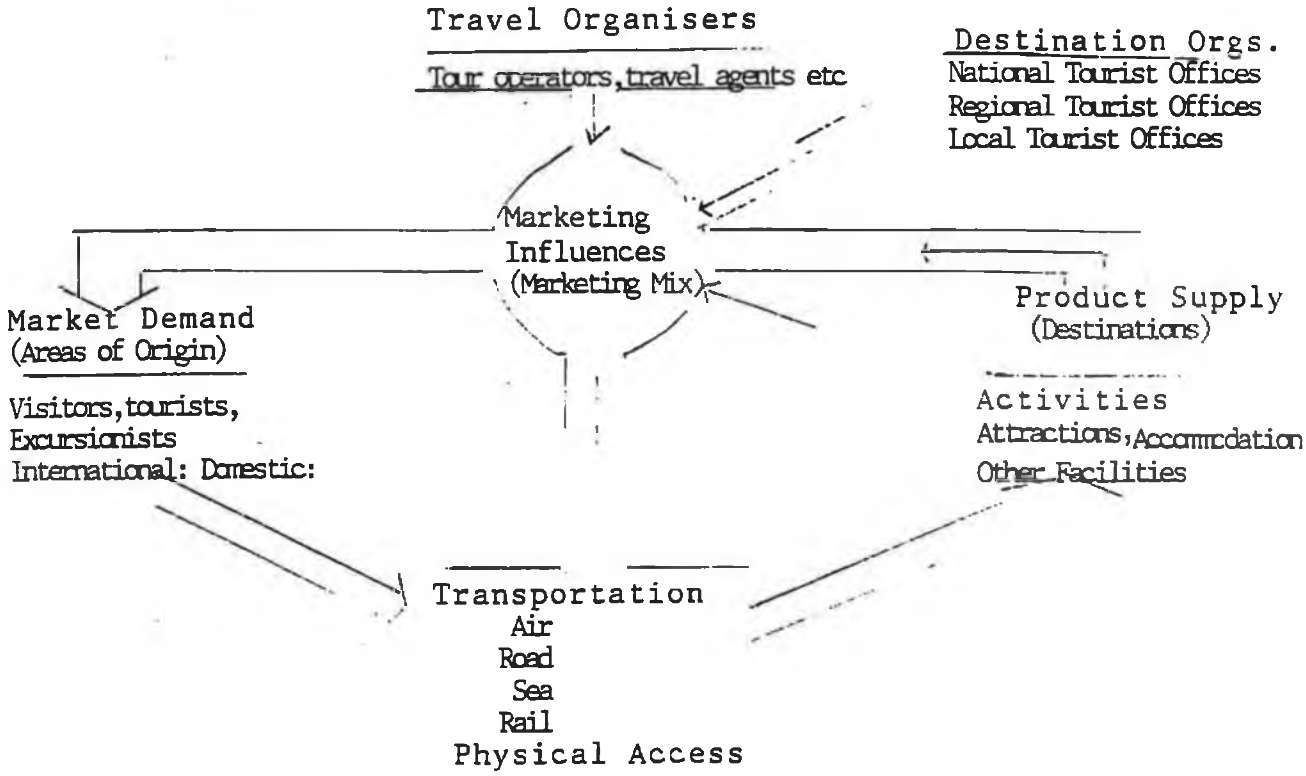
Airlines
Shipping Lines
Railways
Bus/Coach Operators
Car Rental Operators

Travel Organisers	Destination Organisation
Tour Operators	National Tourist Offices
Tour Wholesalers/Brokers	Regional/State Tourist Offices
Retail Travel Agents	Local Tourist Offices
Conference Organisers	Tourist Associations
Booking Agencies (E.G.Accommodation)	
Incentive Travel Organisers	

Source: Middleton V.T.C.1988. Marketing in Travel and Tourism. Heinemann.

Each of the compenent sectors comprise several sub-sectors, all of which are increasingly involved in marketing activities, and hence management of demand. Some of these sectors are fully commercial, being operated for profit; some are operated commercially

The Systematic Links between Demand and Supply and the Influence of Marketing.



Source: Middleton V.T.C. 1988. Marketing in Travel and Tourism. Heinemann.

for objects other than profit;and some in the public sector are operated mainly on a non-commercial basis.

By combining the five main industry sectors in order to influence visitor demand,Middleton sets out to show the relationship between market demand and product supply - specifically the marketing mix. The figure concentrates on the main sectors exclusively,although it is admitted that there are many more possible linkages.For example,given that a detailed knowledge of their customer characteristics and buyer behaviour is central to the activities of marketing managers in all sectors of the industry,not all visitor trips may be influenced by marketing activity,i.e.domestic visitors may travel by private car and stay with friends or relations and so not be so dependent on commercial appeals.

Both singly and collectively,each area is involved in catering to the three main categories of visitor demand,which comprise the different sectors of the total market demand. These are:

1.International visitors,travelling to a country,who are residents of other countries,(inward tourism).

2.Residents of a country,travelling as visitors to other countries. (outward tourism).

3.Residents visiting destinations within their own countries boundaries,(domestic tourism).(Burkart & Medlik,1981.10).

Specific categories may be accorded to visitors,depending on their length of stay.For example,'Visitors',describes all travellers as indicated above.'Tourists',describe visitors who stay over-night at a destination.

Excursionists,or day visitors,describes visitors who arrive and depart on the same day.These may be tourists who make day visits to other destinations away from the places where they stayed overnight.(Holloway.1985.11).

As yet no uniformity exists in the measurement methods used to measure visitor categories.For example,should visiting diplomats or airline crews be included?.At what point in distance or time should a resident be counted as an excursionist?.In the context of Irish tourism,no account is taken of business travel,which is recongnised as a significant contributor to the industry(Brian Maher,1992.8).

Even allowing for the size and complexity of the industry,a definition has been adopted by the British Tourism Society,to define the total market for travel and tourism.

'Tourism is defined to include any activity concerned with the temporary short-term movement of people to destinations outside the places where they normally live and work;and their activities during the stay at these destinations.(Tourism Society 1979.12).

According to Middleton,this definition is comprehensive,it holds good for all countries and encompasses all the elements of visitor categories noted earlier.In particular the definition pulls together three main elements of travel and tourism products:

1.Visitor activity is concerned with aspects of life outside normal routines of work and social commitments and outside the locations of these routines.

2.The activity involves travel and in nearly every case,some form of transportation to the destination.

3.The destination is a focus (albeit temporary) for a range of activities and a range of facilities required to support those activities.

This does not restrict the total market to overnight stays;it includes excursions and day visits.

It may be seen therefore that there is nothing in the definition which restricts the total market to travel for leisure,pleasure or business.It should be noted,however,that it excludes some travel such as commuter or local travel.

In the 'Irish' context,'Tourism' refers to spending within the State by foreign visitors and by Irish residents taking a holiday trip involving at least one over-night.With regard to foreign visitors,this definition includes international fare payments to Irish carriers such as Aer Lingus and B + I,as well as spending by excursionists - mainly day trips by Northern Ireland residents to the Republic. However,in relation to residents of the Republic. the 'tourism' definition excludes business travel and day-trips within the State.(CERT 1897.2).

The CERT Report goes on the say that "Tourism is like any other product exchanged for money in the market place.The consumer sees it as including everything that takes place during the period away from home and ending with the return. This will include access transport,frontier formalities,accommodation,dining facilities,entertainment,leisure activities,shopping etc."

Based on this broader concept,they categorised the organisations and companies in the Republic which provide services to visitors. The inclusion of Irish-based tour operators and travel agents is as a result of the proportion of spending,by Irish travelling abroad,thatis earned by companies in the Republic.The scheduled airlines,sea ferries,travel agents and tour operators all benefit and this supports a range of jobs.

Table 1. 32 Sectoral Categorisation of Tourism,Travel and Leisure Industry.

Sector	Constituents
1.State Organisations	Government Departments Bord Failte,Regional Tourism Organisations,CERT,SFADCO,Udaras na Gaeltachta,Local Government.
2.Access Transport	Airlines,Sea Carriers
3.Internal Transport	Car Rental,Coaches,Caravan Hire,Rail and Bus Services,Internal Air and Boat Services,Taxis.
4.Accommodation	Hotels,Guesthouses,Town Houses,Country Homes,Farmhouses,Camping and Caravanning, Self-Catering Accommodation,Youth Hostels.
5.Tourism Facilitation	Customs and Immigration,Aer Rianta,Docks and Harbour boards.
6.Dining and Entertainment Facilities	Restaurants,Pubs,Cabarets,Theatres, Cinemas,Festivals,TV and Radio.
7.Leisure/Recreation/ Activity Facilities	Cabin Cruising,Horse-drawn Caravans, Golfing,Fishing,Historic Houses,National Parks,Shopping.
8.Tourism Services	In-coming Tour Operators,Tour Operators and Travel Agents,Youth/Student Organisers.
9.Other Services	Banks,Bureaux de Change,Local Tourism Companies and Co-Operatives.

Source:CERT.1987.Scope of the Tourism Industry in Ireland.

TOURISM INDUSTRY - EMPLOYMENT BY SECTOR

Tourism is an extremely labour intensive industry. By its nature tourism relies on personal service and so there is little possibility of large scale substitution of labour with capital. (Martin Dully.1989 1).

Introduction

"The tourism industry may be accorded not one but three distinct attributes - tourism,travel and leisure....it is a unique activity in that it cannot be isolated by looking at the goods or services it provides.It is a consumer activity whose affects are spread across a wide range of industries"(CERT Report.1987.2).
These will include accommodation and catering,travel and transport as well as leisure and recreation and other support services, such as Government departments,State Agencies and Banks.

In 1986,the last major survey of employment was undertaken by CERT - the State Agency for the Hotel,Catering and Tourism Industry. In this,they estimated the total number of people employed full-time,part-time,permanent or seasonal,in tourism,travel and the leisure industries,was just over 150,000. Furthermore,according to the same study,it is estimated that some 38,500 jobs are directly and exclusively dependent on this industry.(Table 1.33).

The industry encompasses approximately 19,000 businesses in every part of the State,within which there is a predominance of very small enterprises,employing on average five people.

Changing Sectoral Structure of Employment.

Since the 1960's,there have been three significant structural changes in the economy;firstly,the Services sector has dominated job growth.In 1987,Services accounted for some 600,000 jobs, representing 56 per cent of total employment.Agricluture was down to less than 170,000 or 16 per cent,while Industry accounted for 28 per cent.(CERT 1987.2).

Estimating Employment Impact of Tourism

As there is no single production sector as such,there is difficulty in determining the number of jobs in tourism. Tourism is primarily concerned with servicing rather than manufacturing and as a consequence,the bulk of employment is engaged in selling goods and services to visitors. Furthermore,the very variety of purchases made by tourists presents a problem in estimating employment.

The direct impact of tourism on employment arises from the income accruing to the businesses (hotels,car rental firms etc) which are the direct recipients of tourism expenditure. These businesses in turn purchase goods and services from other firms in the Republic leading to indirect income and employment effects. It is recognised however that such an approach suffers from certain limitations,in that all sectors are inter-related.Tourism benefits from other sectors and vice versa. Also the multiplier effect generally utilised in this context is a dynamic marginal impact, rather than a static,or average,one,in that it concerns the ultimate effect of additional new expenditure into an economy. (Brian Deane.1987.14).

The main sectors deriving a significant source of income from tourism and leisure spending are:

*hotels and other forms of accommodation

*catering (excluding institutional) and entertainment

*travel and transport services,and

*leisure/recreation and related services.

Estimates of the numbers employed in the various sectors are outlined below, under four main categories; 1. Accommodation and Catering, 2. Travel and Transport, 3. Leisure/recreation, 4. Other support services.

Table; 1.33 Structure of Employment in the Tourism Industry in the Republic of Ireland.

Category	Number of Establishments	Total Employed	'Job Equivalents' directly related to Tourism*
Accommodation	4,838	34,750	15,910
Catering	11,334	51,950	4,740
	16,172	86,700	20,650
Access Transport	34	8,500	4,500
Internal "	N/A	33,435	1,755
Travel Services	309	3,200	115
Travel Facilitation	9	2,720	1,900
	412	47,855	8,270
Leisure/Recreation	852	14,510	6,915
	852	14,510	6,915
Sector Support Services	N/A	350	85
State Organisations	129	2,750	2,580
	129	3,100	2,665
TOTAL	17,565	152,169	38,500

Source: CERT. Research Report, Scope of the Tourism Industry in Ireland. 1987).

*Job Equivalents: 2 Part-time = 1 permanent full-time
3 Seasonal full-time = 1 permanent full-time
5 Seasonal part-time = 1 permanent full-time.

The method used by Bord Failte to estimate the number of jobs directly dependent on tourism is different from the approach used by CERT.,however,the results correspond closely,according to CERT themselves. Bord Failte estimated that about 34,000 jobs were directly dependent on tourism,whereas the above survey by CERT,indicates a figure of just over 38,500. The difference, according to CERT,is almost entirely accounted for by the latters' higher estimate of numbers employed in Transport and Travel.

The Irish Hotel and Catering Industry

The Hotel and Catering industry is one of Ireland's top sources of employment,(107,074 people),of which 81 per cent are permanent jobs and 16 per cent are seasonal. As an industry,it has a low staff turnover,averaging 6 per cent. Of those who change jobs, 80 per cent stay within the Hotel and catering Industry. As with other sectors within the tourism industry,hotel and catering also covers a number of different areas,as the table below shows.

Table:1.34Employment in the Irish Hotel and Catering Industry.
(1988 Estimates)

Area	Number	Employment	Male%	Female%
Hotels	680			
Guesthouses	196	27,116	34	66
Restaurants	630	10,570	35	65
Popular Catering	680	16,438	38	62
Ethnic Restaurants	153	1,690	47	53
Industrial (Contract)Catering	5	2,118	15	85
" (In-house) "	78	698	15	85
Carriers	5	1,872	52	48
Hospitals	249	9,608	16	84
Institutional	237	2,803	8	92
Licenced Premises	8,760	30,937	74	26
Delicatessens/Take-aways	512	2,399	30	70
Sports & Social Clubs	52	825	42	58
TOTAL	12,237	107,074		

Source:Manpower Survey of the Irish Hotel and Catering Industry. CERT 1988.

Employment is highest in the Dublin area at 32 per cent,second in Cork/Kerry at 18 per cent. The proportion of males to females is 41 per cent male to 59 per cent female,overall.

Hotels and Guesthouses ,after Licenced premises,remain the largest employers in the industry at 27,116;with Popular Catering as the second highest at 16,438.

In this sector,Chefs are the largest employee group,with 'multi-skilling continuing to become a feature of the industry,especially in smaller hotels and guesthouses. There is a high proportion of owner managers in hotels and restaurants,just over one third having received formal education for hotel/restaurant management.

Mobility of the sector becomes apparent when it is realised that twenty-five per cent of the Restaurants surveyed had opened since 1984;as had 50 per cent of Popular Caterers and 30 per cent of Delicatessens and Take-aways.(Assuming that it was not the intention of the survey to interview particular categories.Furthermore the report does not identify where in particular,if at all,any regional differences were to be found).

The industry employs a higher proportion of women overall although women are under-represented at management level.(30 per cent of senior managers in hotels are women,17 per cent in restaurants).

Most establishments are small,employing less than 30 people.This is of course a higher average than for the services sector for the State as a whole.(See Table 1.34).

Non-Food Accommodation Sectors.

According to the CERT report,the tourism product,excluding accommodation can be subdivided into 40 main sectors,each comprising a particular product or activity.(Total 1,484 firms). The industry is characterised by many small firms (69 per cent employing less than 10 employees;only 4 per cent employing over 75).
Although employment varies according to the degree of seasonality, increasingly the nature of some businesses requires a 'core' of managerial,marketing,clerical and maintenance staff,all year round. Furthermore,the size of the firm,together with the nature of its business,closely determines the distribution of a sectors work-force by job category,as seemingly does workforce by age group.

Skills-related training,as with other branches of tourism,varies from sector to sector,being highest amongst full-time,permanent workers,but also part-time professionals,(e.g.teachers).
Generally informal training was of poor quality. Short-term intensive courses were sought as remedies where inadequacies existed,such as particular skill weaknesses,i.e. a background of formal academic training,but employed to do jobs which required skills vastly different from those acquired during formal training. However the CERT research apparently did not question as to why such individuals were employed or why the formal training did not identify the absence.(CERT.1991.15).

Table:1.35 Main Training Needs in Non-Food/Accommodation Sectors.

Training Needs	%Sectors
Communication Skills	65
Customer Relations	63
Product Knowledge	45
Technical	45
Languages	45
Marketing/Selling	38
Human Resources	33
Computer Skills	32
Finance/Business	31
Administration/Secretarial	30
Catering	15
Law	8
Market Research	5

Source: A Profile of Employment in the Tourism Industry in Ireland. Non-Food/Accommodation Sectors. CERT 1991.

As may be seen in Table 1.35, the main perceived training needs were in areas related to customer care. It is perhaps surprising that marketing needs have come so far down the list. Again where Services are so dependent on satisfying customers needs, emphasis would be given to identifying customers ;and product demand. Perhaps a study of consumers perception of the training needs of the industry, would reflect more appropriately, areas requiring improvement or development.

Leisure Centres

In the United Kingdom, the development of sport, leisure and recreation centres has been a relatively recent phenomenon, coinciding with the burgeoning public expenditure in the early 1970's. (Cowell.1988.16). Cowell goes on to say, "typically managers were ex-physical recreation teachers or specialists, ex-military training personnel or local authority employers, who had not received their 'schooling' in business situations." Furthermore, local authority, where concerned, generally operates differently from business - profit rarely dominating thinking. Also organisational structures are often extended and are rarely designed for a speedy response to the market place. Political interests cloud issues and the areas covered, often regarded as social. (Cowell, 1988.16).

A number of leisure activities involve tourism directly and therefore have implications for the hotel sector, whilst others not involving overnight accommodation are of significance to the catering sector. According to Buttle, "to a large extent corporate success in the hospitality industry is dependent upon satisfying leisure needs and wants. However as with hospitality, there is no single definition of the term leisure." He states", what is leisure for one person may be work for another". (Buttle.1986.17).
A more reasonable approach is taken by Voss, who gave a definition of leisure as "Leisure is a period of time referred to as discretionary time. It is that period when an individual feels no sense of economic, legal, moral, or social compulsion or obligation, nor of physiological necessity. The choice of how to utilize this time period is solely his". (Voss 1967.18.)

The total employment estimate was 2,394,of which 48 per cent of companies employ between 1 and 5 persons,76 per cent employing less than 10 persons. The proportion with regard to gender is 47 per cent male,53 per cent female.

Just under half of the staff (48 per cent),are employed in a permanent,full-time capacity,34 per cent,permanent,part-time, the remainder (18 per cent),almost equally divided between seasonal full-time and part-time.

The vast majority of staff attended full-time educational courses beyond primary level (48 per cent,post-second level;63 per cent with certificate or higher level). Furthermore,one third recently attended in-service courses in management etc. A further one third stated they would have liked to attend,but were unable due to time,cost or incentives.

Marketing was perceived as highest importance by proprietors/ managers,followed by industry knowledge and training of staff.

On the other hand,staff stated they felt confident on the area of customer care and set high priority on marketing and management. (CERT.1991.15).

Summary

It is seen that the Irish economy is dependent,to a great degree, on the benefits of tourism,not only as a source of employment, but also as a contributor to the economy as a whole. The tourism industry is made up of a collective of many different sub-sectors and may be considered as a major representative of the services industry in Ireland.

As a result of the numbers employed,the 'Hotel and Catering' industry is of particular importance,followed by 'Communication', and 'Recreational 'services.

Narrowing the industry further,it was seen that Leinster (of which Dublin,Metropolitan,makes up the greater part),represents the largest relative compilation of businesses and personnel employed.

The traditional tourist market sources are tending to change, in particular,the increasing importance of Great Britain,as well as the growth in numbers of visitors from Continental Europe. In both these markets,(as with the Domestic market),the duration of stay,is shorter than those from North America. Also the amount spent per head,on average,showing an increase for all but the North American market.

A wide variety of accommodation is used,reflecting the diversity of activities or purpose of visit. For example,although most visitors come for the purpose of a holiday,a considerable proportion also come to visit friends or relatives.

It is to be expected that most visitors arrive during the summer months,although 17 per cent arrive between October and December on average.

The variety of categories that comprise the tourism industry include travel and leisure activities,as well as food and accommodation,and entertainment. Primarily tourism satisfaction is dependent on the personnel providing the broad range of services, because of the nature of the industry. It is this very point which gives rise to the importance of tourism to the economy - in particular,employment.

The biggest employers are in 'Hotels and Catering',overwhelmingly so in terms of the total employed,accounting as they do to over half of the 'Job equivalents directly related to Tourism'. The Hotels and Catering industry,in addition to being one of Irelands' top sources of employment,also have an 81 per cent 'permanent' staff rating. The highest proportion of people employed,is in the Dublin area.

The services sector as a whole,is characterised by the small size of individual companies,of which a large proportion are owner - managed. Small numbers of staff also typify the non-food/ accommodation,and leisure sectors;where they are not associated with a hotel or similar facility.

Particular specialist training skills do not appear to present a difficulty,suggesting a basic ability on the part of personnel, to provide the services expected of them. However,small businesses make demands on personnel,in areas where they may have no particular expertise or training,and which could give rise to possible customer dissatisfaction.

SURVEY METHOD

"The underlying philosophy of marketing - that customers' needs are the starting point from which business firms and other organisations should logically plan their activities - is as relevant to 'non-tangible' products i.e. services,as it is to physical products. Yet until fairly recently there has been a curious,if not stubborn,unwillingness by providers of services to acknowledge the value of this basic guide to successful operations". (Chisnall.1986.19).

Desk Research

Data collection should start at the secondary level,taking full advantage of available published information,in order to give a sound base to the whole research programme. Marketing research data may be gathered with a little ingenuity and at low cost, saving both time and money and is particularly valuable in giving an in-depth knowledge of markets.

"Library or desk research,which has the attraction of being non-reactive or of being unobtrusive,is an established method of collecting secondary data;it is economical,comparatively speedy and can be undertaken with complete confidentiality." (Chisnall.1986.19).

A particular problem with research in the service sector is the dearth of secondary sources of information for desk research purposes. Also the information that does exist is often fragmented and scattered amongst special fields, (e.g. library services, tourism,transportation,professional services). The overall problem of the relatively poor quality and quantity of information about services is aggravated by the problem of the lack of a clear definition of what are services anyway. (Cowell.1988.16).

Secondary data sources include texts,reports and tables relevant to the subject area;these principally comprise;

Tourism - Middleton V.T.C. 1988.Marketing in Travel and Tourism. Heinemann.

Services - Cowell D.1988.The Marketing of Services.Heinemann.

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Differences between Marketing Research for Services and for Products.

It is to be expected that certain further difficulties may arise as a result of researching services in particular.
Primary amongst these are the following;
Size - some service organisations are too small in size and too local in character;and conduct work at only the most elementary levels. As a consequence they would obtain and hence only represent the most basic of markets.
Monopolies - some companies may be unrepresentative as a consequence of the absence of competition.
Economic - as a result of both small size and/or monopoly,service companies may consider marketing research unnecessary or financially unjustifiable,so that information may not be available.
Managerial - it has been suggested that some service organisations lack training in marketing which may lead to misinterpretation of available data.
Customer contact - by virtue of their very closeness to customers, market analysis in service companies may be overly subjective, resulting in a tactical rather than strategic approach;and "the very nature of services means that researchers have to be prepared to use qualitative data,particularly in conceptualizing the service".(Cowell.1988.16).

Sample Design

The first stage in a any sample design is to define as closely as possible,the population to be covered in a research enquiry. In this case,the population to be studied comprises those firms directly involved in contributing to the tourism product in Ireland,specifically; Accommodation and Catering.

Because of the widely varying nature and size of companies operating within tourism,the question arises as to an individual company's suitability to represent either a particular sectoral perspective or the tourism industry as a whole,or services in general.

On the basis of employment,larger companies would tend to be more capable of representing a wider perspective,(both theoretical and practical),whereas smaller companies would illustrate the typical,and possibly more realistic side of services marketing in the Irish context,in particular,the difficulties experienced as a result of working with small numbers of staff.

Given that it is possible to draw a sample from the population of industries as outlined,the aim is to arrive at a sample that accurately reflects that population,so that valid conclusions can be inferred. The object is therefore to keep any distortion or bias which may result,to a minimum.

This survey covers two different industries and businesses and the method and planning of the sample is controlled by the sampling frame.

"The quality of random sampling techniques rests largely on the selection of suitable sampling frames and on their availability at the time of research".(Chisnall.1986.19). Chisnall identifies five criteria which are useful in evaluating sample frames,as follows;

Adequacy - the sample frame should cover the population to be surveyed and be adequately related to the purpose of the survey.

Completeness - all units of the population should be included. "Missing units will not have the opportunity of being selected and the resultant sample will be biased to this extent. This may be serious if those excluded happen to possess particular characteristics".

Duplication - there should be no duplication. Attention should be paid to the possibility for an item or area to be included more than once. Such a situation might arise in the case of a directory,where the item is entered more than once (e.g.under different headings).

Accuracy - the units to be included should be as up to date as possible. For many reasons,not the least of which is time,lists may be unrepresentative,or not exist anymore.

Convenience - this refers to the accessibility of the list and to the suitability of its arrangement for the purposes of sampling.

There are numbers of lists from which samples may be selected, but which suffer from certain limitations to a greater or lessor degree. These may be of the following kind;
Non-listing;individual companies may in fact not subscribe to the directory and therefore cannot be included.
Duplication;companies may be listed more than once by virtue of being classified according to more than one criterion i.e. a hotel being listed under a)leisure b)sporting as well as c)accommodation.
Nature of business;there is no guarantee that the classification as stated,accurately indicates the true or perceived nature of the business,especially so where such listings are old and the company/market has changed.
Company size;the listing may be seen as simply a statement of the fact that the company exists,without making any reference to company size on any count.
Availability;certain lists may be considered more appropriate for mention (common terminology),as well as ease of access.

Official listings from the tourism industry are compiled from a sectoral point of view,in line with the major divisions as indicated, (accommodation,catering,transport and support services),and estimates are made for the industry as a whole,on the basis of projections on surveys undertaken within those sectors.
Various sectors are also represented on a geographical basis.One which is central to this study is the combined list of subscribers or members of Bord Failte - the Irish Tourist Board,located in the Dublin area,i.e.Dublin Tourism.

Form of Sample

Because of the varying nature of the population,it is necessary to select the most appropriate form of sample.
The sample frame arrived at(using the industry list compiled by Dublin Tourism)using stratified random sampling,better reflects the ratio of the population to the sample. For example,the population to be surveyed is divided into groups with similar attributes.So in each stratum,the population is more nearly homogeneous than in the total population,thus contributing to the accuracy of the sampling process.

The Dublin tourism 'Industry' is segmented into a number of strata, depending on the nature of the business,as indicated below;

Table:1.36.Dublin Tourism Industry Population.1991

Business	Number of Members.	%
Approved Accommodation	4	-
Bord Failte	1	-
Caravan & Camping	2	-
Food & Drink	113	15
Farmhouses	3	-
Guesthouses	29	4
Hotels	76	10
Hostels	4	-
Other Business (Services)	138	18
Self-Catering	84	11
Town & Country Homes	261	34
Tourism Products	31	4
Travel & Transport	30	4
TOTAL	776	

Source:Dublin Tourism Register of Members,1991.

Unfortunately, information relating to the size of individual companies with regard to turnover, number of employees etc, is unavailable and therefore the survey must concentrate on the nature of the business and estimate the importance of each sector by overlaying the number employed in that sector, nationally. As will be seen in Table 1.37, there are 776 firms operating in the Dublin area. It is proposed therefore, to apply a quasi-random sampling methodology and to survey approximately 5 per cent of this figure, i.e. 39 firms, given the inevitable time and financial constraints associated with this research project.

Table:1.37 Dublin Tourism Sector Sizes

Nature of Business	Number of Companies in this Sector	Employment (Full-time, Nationally)
<u>Accommodation</u>		
Hotels	461	15,910
Catering	113	4,740
	574	20,650
<u>Transport</u>		
Access	-	4,500
Internal	-	1,755
Shipping	30	4,500
	30	10,755
<u>Travel Facilitators</u>	1	2,015
<u>Other Services</u>		
Leisure	2	2,415
Support	169	2,665
	171	5,080
TOTAL	776	38,500

Source: Dublin Tourism List of Paid-up Members 1991.

As may be seen from table 1.37,certain sectors of the industry do not have any allocated numerical figure. This is not to suggest that there are no representations from these sectors in the Dublin area,but that the register of paid-up member companies,as compiled by Dublin Tourism,does not make any specific reference to these classifications.
Therefore,in order not to preclude any individual company from the survey,a quasi-random sample selection method is proposed.

Systematic or Quasi-random Sampling

"This sampling method does not give equal probability of selection to all possible samples which could be taken from a population. It depends on the existence of a sampling frame of the population under investigation"(Chisnall.1986. 19).This list,as indicated, is available in the form of numbers of companies,but without details as to numbers employed within each company.
As Chisnall explains,"quasi-random sampling involves calculating the sample interval,obtained by finding the ratio of the populat-ion to the sample,i.e.N/n (in this case,776/39 = 20). A random number is then chosen between one and the sampling interval. Then successive random points are chosen by adding the sampling interval to each succeeding number. Hence,the selection of one sample number is dependent on the selection of the previous one and so strictly speaking they are not chosen by a truly random process. Although the first number is randomly selected,successive numbers are not independently chosen because the sampling interval predetermines them".(Chisnall.1986. 19).

The firms eventually in the sample will be derived by random selection from the list,in order to avoid the subjective bias that may arise where a personal choice arbitrarily selects units. It entails numbering every unit in the population and random numbers are selected in a systematic way.
This method is more appropriate where all members of the population may reasonably be surveyed. (i.e. convenient distance or otherwise through an appropriate,available method,such as mail).
As mentioned,the sample is arrived at using a uniform sampling fraction,as little is known about each sector of the population, other than the nature of the business and the numbers of each business within each sector,in the Dublin area.

Sample Size.

The size of the sample should be based on the basic characteristics of the population,the type of information required from the survey and the cost and time required;some attributes may be more critical than others and should be reasonably be assessed. In this sample the sub-groups are selected according to their number in the industry;and hence their possible weighting. The significant characteristics of the total population will be represented in the identified strata.

Questionnaires

"The aim of any questionnaire is to attract respondents to give valid and reliable information about the subject of the enquiry, and to do this with the minimum distortion or bias."(Chisnall. 1986. 19).

Three conditions are necessary for ensuring a true response to questions,these are;

1.Respondents must be able to understand the question,

2.They must be able to provide the information requested,

3.They must be willing to provide the information.

In researching within such an area as tourism,it is highly probable,that several executives,perhaps from different departments,may be involved in decision-making,which itself may be complex,involve large investment in capital and result in long term commitment. General characteristics of certain sectors may be similar,however there may be particular features present which affect outcomes,and which the respondent may not wish to pursue.

Cooperation on the part of the respondent is always voluntary, relying as it does,on their goodwill. This does not necessarily imply accuracy under any circumstance. Error may arise as a result of inability to answer through lack of knowledge,or bias in the question,or questionnaire structure. There is little to be done in the case where respondents do not have,or will not divulge accurate information. However the form of the questionnaire and phrasing of questions should aim to minimise error in all other cases.(Chisnall.1986.19).

The following questionnaire attempts to recognise the many sources of bias and error and so yield a valid measure of the profile of services within the tourism industry in Dublin.

Survey Method.

In view of the nature of the survey,and the extent and depth of the information sought,it is considered more expedient to proceed directly to personal interviewing,and to resort to alternative methods only in the case where an interview is not forthcoming. The telephone is not considered suitable for the collection of data which may be considered confidential or sensitive. Where self-completion may be necessary,allowance should be made in the structure of the questionnaire,and the form or the questions themselves.

In order to satisfy the foregoing requirements,the senior executive with responsibility for marketing will be identified. By not concentrating on a particular title,will allow flexibility,such as the varying size of companies in the tourism industry,and the possible absence of a specific management hierarchy,that official titles may imply.

Although objectives and decisions are couched in verbal terms, for the purposes of communication,they must by necessity be accorded some measure by which they may be assessed. The format of the questionnaire is thus to identify the place of marketing within the respondents' company,and its effective performance.

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Aim of Research

Broadly speaking,two forms of questions are employed;

1.Structured - in order to capture specific,comparative data where possible;substantiating or yielding a measure of the effectiveness of specific activities employed,and

2.Unstructured - questions designed to elaborate areas where quantitative measures are inappropriate or unavoidable.

The questionnaire addresses the main areas within a company which may be considered to have a marketing input. These comprise the following;

Market Orientation

This section asks if marketing is actively practised within the organisation. It seeks to do this by firstly establishing the broad extent of marketing activities practised,secondly,to develop a company profile of personnel,regarding their qualifications in marketing and thirdly,the financial support given to their marketing effort,including the criteria by which financial support is made.

Customer orientation

Here the subject is the company's desire and ability to satisfy customers,in the pursuit of sales. It seeks to establish the degree of emphasis on clients,and the source of client orientation.

Process

By identifying the main service functions,to evaluate the emphasis placed on marketing,and the way in which the service process is undertaken. This includes the bearing service process has on customer satisfaction - other than that which is strictly marketing.

Competitor Orientation

Although certain sectors of the tourism industry may operate through consortia or groups,the aim is the form and extent of competitiveness. This includes marketing research,segmentation and promotion.

Organisational Characteristics

This section looks at the environment within which the organisation operates,and the extent of success or failure,insofar as the company is responsive to perceived market forces. This includes how active the company sees itself to be,in its pursuit of an identified marketing strategy.

(For full questionnaire-see Appendix).

ANALYSIS OF RESEARCH

Analysis of Tourist Research

Overall 50 interviews were completed,comprising 20 hotels and 30 restaurants. Location was the greater Dublin area,both north and south of the river Liffey. Although geographic distribution was helpful in terms of efficiency of interviews,no regional differences regarding respondent characteristics were sought.

In spite of the perceived over-sampling of the industry by various interested groups,the problem of non-response proved to be of little inconvenience,the sampling frame providing adequate opportunity for replacement,using the same selection method already referred to. In fact only a very small number actually declined when telephoned for an appointment. The status of the respondent was owner and/or duty-manager or upwards in seniority. In one case only the respondent described herself as 'Head Receptionist'.

Although it may be perceived that the areas and specific information collected might be more detailed,it was decided at the outset,that rather than trying to delve into company finances which are unlikely to be divulged anyway,an over approach would be more useful.the aim was to develop a profile of the industry and with this in mind,it was felt that comparative criteria would yield genuine and more open response.

Aim of the survey.

The purpose was not to criticise the industry from an abstracted standpoint,but rather to try to see what the industry thought of itself,and within a broad framework.This would be acheived by highlighting areas of strength and weakness (if any),but on grounds or bases that the respective companys - and hence the industry has established for itself.

Findings

The main markets served are either Domestic,International or Domestic and International mixed,standing almost equally at over 40 percent of those hotels and restaurants surveyed. Only 4 per cent of respondents said their main market was international,comprising the larger hotels almost exclusively.

TABLE 1 Main market served

BUSINESS	DOMESTIC	%	I. NAT.	%	MIXED	%	TOTAL	%
HOTEL	3	15	6	30	11	55	20	40
REST'NT	19	64	1	3	10	33	30	60
TOTAL	22	44	7	14	21	42	50	100

This immediately demonstrates the dependence of the industry (particularly for the not so large companys),on domestic with 'Irish'clientele,in addition to a European or possibly global tourist. The domestic market accounts for 44 per cent of the market, domestic/international mixed, accounting for 86 per cent.

What is the prime concern of your company ?

Over half (56%) stated that the concern of their company was to achieve sales (and hence profit?), rather than placing emphasis on other areas mentioned, such as promotion, training quality control and so on. Broadly stated, concern for sales is not surprising, but what is of interest is the low number who stated that their concern was for promotion, training or quality.

TABLE 2 Prime concern of company

Concern	Frequency	Percent &	Hotels %	Rest'nts%
Sales	28	56	50	60
Training	6	12	20	7
Promot'n	8	16	20	13
Quality	6	12	10	13
Research	1	2	0	3
Prod.Id	1	2	0	3

This emphasis on sales is reflected in the respondents identification with competition, which as will be seen later, is on the basis of product, location and then market. This would suggest a targeting approach, where the need exists for segmentation on one or more characteristics. Where emphasis is placed on sales, there is also a strong identification with dependence on staff,and in turn their attitude to the business. The only other area of apparent association was on quality emphasis suggesting an awareness of the need for a good product of high standard.

How do you rate the following activities for their effectiveness?

In terms of effectiveness for the company,a service identification was considered uppermost,with an average score of 8 (possibly as a result of the respondent identifying with the topic of the survey - services). Next in rank order came market segmentation followed by,sales forecasting, then customer research,competitive research,support selling,advertising and finally merchandising.

TABLE 3 Effectiveness ratings of selected activities.

Activities	Av.score	Hotels	Rest'nts
Ser.Ident	7.9	7.8	8.0
Markt Seg.	6.7	7.0	6.6
Sales F'Cast	6.1	7.0	5.3
New Prod.Dev.	5.6	5.5	5.7
Cust.Resch	5.5	5.3	5.6
Comp.Resch	5.4	5.8	5.1
Suppt.Sell	5.2	5.2	5.2
Advertising	5.1	5.1	5.1
Merchandise	4.9	5.2	4.8

In comparing the differences between hotels and restaurants. the major difference is in the ranking of sales forecasting and competitor research which do not reflect so well on the tendancy of restaurants to analyse their markets so objectively,but to depend more on product and customer service to achieve their aims.

Service identification showed a negative skew with only 6% of respondents awarding themselves a score of 2 or less from a possible maximum of 10. In fact,94% scored themselves 'average' or above in the effectiveness of a service identification,for them. There was litle difference between hotels and restaurants on this variable.This would indicate that companys acknowledge the need for a service culture,however it may be the result of a perceived ideal rather than a practical reality.

The higher than average score for effectiveness of market segmentation would indicate an awareness or knowledge of the profile of a particular chosen group of customers. This would appear to be the case if one compares the this aspect of the business and the approach to niche marketing and basis of competitor identification.
Market segmentation is considered more important by hotels than restaurants,only 2 hotels scoring this as less than average. The two hotels in question do not have an identifiable customer base or product identification.

Sales forecasting scored above average,especially by hotels,nearly half of the restaurants interviewed,rated sales forecasting as below average in effectiveness.

New product development at an average score of 5.6,ranked only marginally ahead of both customer research and competitor research,with an effectiveness rating of 5.5 each. The distributions were very similar,but hotels tended to consider customer research as marginally less effective than competitor research,whereas restaurants considered customer research to be more effective. Competitor research tended to be informal in most cases,whereas restauranteurs by the nature of their business,tended to think they knew their customers.

Support selling tended to be highly valued by restaurants,the reponses being somewhat grouped together,that is the variables were considered either effective or not at all effective. A similar picture emerged as far as advertising effectiveness was concerned.

On the basis of why any aspect was rated highest,the main reason given was that of market identification (26%) or product identity (24%).

TABLE 4 Rating in order of importance

Variable	Hotels %	Restaurants %
Product	20	27
Nature of Business	5	23
Sales	15	20
Market Ident.	40	17
Service	15	13
Competitor Research	5	0

Where elements were rated low,both hotels and restaurants tended to be more fixed in their ideas,stemming from an identification with a standard product (18%),to ignoring competition (14%),or feeling that they knew the market (14%). Again restaurants were more likely to have a product identification than hotels.

Where a high score was awarded,the company/respondent was more inclined to try and offer a mix that was different from that of their competitors. The basis of this differentiation tended to be service (34%),closely followed by product differentiation (31%)

TABLE 5 Rated high for effectiveness

	Type	Market	Product	Sales	Service	Compet
Hotel	5	40	20	15	15	5
Rest.	23	17	27	20	13	0
Av.	16	26	24	18	14	2

TABLE 6 Rated low for effectiveness

	No value	Ign.Comp	Know.Mkt	Low.resp	Std.Pdct
Hotel	55	10	15	5	15
Rest.	37	17	13	13	20
Av.	44	14	14	10	18

What influences this rating?

On the question of influences on the ratings given,on the positive side,respondents considered they had market knowledge,experience and committment - either on the part of satff or management. Those who rated low on marketing expertise felt that individual marketing staff were absent or alternatively,that more marketing could always be done.

How many employees are there in your company?

The average number of employees in respondent companys stood at just under 50,full-time 32;part-time 17).

TABLE 7 Average number of employees

Business	Full-time	Part-time
Hotels	53	23
Restaurants	13	13

Only 8 of the respondents have staff numbering 100 or more. These comprise 6 hotels and 2 restaurants. One of the restaurants was associated with a large hotel group,whilst the other specialised in night-time entertainment on a large scale. Discounting these larger establishments reduces the average number of employees as follows:

TABLE 8 Average number of employees (smaller companys)

Business	Full-time	Part-time
Hotels	20	10
Restaurants	7	8

Does your company have a separate marketing department ?

Only 8 respondents (16% of sample) have a marketing department. These comprise two restaurants,he rest being hotels.In only two cases is the number employed in the marketing department greater than 15 (the actual number employed being 15 and 16 respectively). The rest are either one or two personnel.

TABLE 9 Existence of marketing department

Business	Yes	No	Total sample
Hotel	6	14	20
Restaurant	2	28	30
Total	8	42	50
Percent	16	84	100

How would you rate your company's level of marketing expertise?

TABLE 10 Overall rating of companys level of marketing expertise

Num	3	4	5	6	7	8	9	10
Frq	1	3	14	8	8	6	5	4
Cum %	2	8	37	53	69	82	92	100

63 per cent of respondents rated themselves as above average on the question of marketing expertise,the average rating being 6.6 out of a possible 10.

TABLE 11 Rating of company's level of marketing expetise (by business).

Rat	3	4	5	6	7	8	9	10
Hot	0	0	50	15	20	10	0	5
Res	3	10	14	17	14	14	17	10
Av.	2	6	29	16	16	12	10	8

None of the hotels rated themselves lower than 50 per cent on marketing expertise,compared to the 13 per cent of restaurants who did. Although hotels tended to score more closely around the mean,restaurants rated themselves more highly,whilst presenting a wider distribution overall.

What influences this rating ?

On the positive side,respondents considered that they had market knowledge,experience and commitment - either on the part of staff or management. Those who rated them,selves as low on marketing expertise reasoned that either individual marketing staff were not employed in the company,or that under any circumstances additional marketing could always be undertaken.

TABLE 12 Influences on companys level of marketing expertise.

Influence	Hotel	Restaurant	Average
Staff	11	3	7
Commitment	5	19	13
Markt.Know.	28	25	27
Experience	28	11	18
Ad. & Prom.	5	15	11
Could do more	22	26	24

Hotels mention market knowledge along with expertise as the reason for possessing market expertise. Restuarants,in addition to mentioning market knowledge,mention,'commitment of purpose',along with reliance on advertising and promotion.

Neither business places great reliance on staff (especially restaurants). Hotels appear only to acknowledge commitment along with advertising and promotion.

Both types of business recognise that more could be done to improve their marketing effort,and the score here is in response to why a low score was given to marketing expertise in the first place.

Do you consider your staff to have particular strengths in any of the following areas ?

TABLE 13 Existence of marketing strengths (%)

Area	% yes	Exper	Train'g	Friend's	Staff
Av.	58	56	11	15	18
Hotel	37	40	10	20	30
Rest.	63	65	12	12	12

Staff abilities on top of experience is claimed to give rise to marketing strengths for hotels,whereas overwhelmingly restaurants rely on experience.

TABLE 14 Existence of management strengths (%)

Area	% yes	Exper.	Train.	Friend's	Staff
Av.	70	53	18	15	15
Hotel	75	47	13	27	13
Rest.	63	58	21	5	16

Again experience counts for more than any other reason for management strength,for both hotels and restaurants.

TABLE 15 Existence of selling strengths (%)

Area	% yes	Exper.	Train.	Friend's	Staff
Av.	68	43	23	10	23
Hotel	75	27	33	20	20
Rest.	50	60	13	0	27

So it may be seen that restaurants consider experience as the main reason for selling strengths,certainly not friendliness. Hotels put selling strength down to training first and experience only considered as second.

TABLE 16 Existence of customer relations strengths (%)

Area	% yes	Exper.	Train.	Friend's	Staff
Av.	96	27	7	48	18
Hotel	90	22	11	50	17
Rest.	97	31	4	46	19

Friendliness comes to the fore in the case of customer relations strengths,suggesting a particular approach of the hotel/restaurant industry towards dealings with their customers. Staff do not rank second,rather experience -(presumably in customer relations),training falling behind in both cases.

TABLE 17 Summary of existence of strengths.

Area	% yes	Reason	% claim	Hotel	Rest.
Markt.	58	Exper.	56	40	65
Mngnt	35	Exper.	53	47	58
Sell	68	Exper.	43	27	60
Cust.R	96	Friend.	48	50	46

The emphasis on experience was common to all the aspects of marketing,management and selling. Only customer relations exhibited a higher score-on friendliness. The claim to one or more strength ranged between 43 and 55 per cent of respondents. As may be seen from the table,restauranteurs more often claimed strengths,than hoteliers,(in particular selling),possibly again reflecting the more immediate nature of their business,its volatility and scarce resources.

Even though respondents were inclined to claim a strength,a difficulty was likely to arise in explaining exactly why or where that strength lay,except in very general terms.

TABLE 10 Self- Rating on level of marketing expertise (10 highest)

Num	3	4	5	6	7	8	9	10
Fre	1	3	14	8	8	6	5	4
Cum %	2	8	37	53	69	82	92	100

What influences this rating ?

On the question of what influences the companys rating on marketing expertise,on the positive side,respondents considered that they had market knowledge,experience and committment - either on the part of staff or management. Those who rated themselves low on marketing expertise appeared to feel that individual marketing staff were not employed in the company,or that under any circumstances additional marketing could be done.

Is any further training undertaken by your staff ?

Training is undertaken by 66 per cent of respondent companys. It seems training is marginally more likely to be undertaken by restaurenteurs,(65% of hotels,67% of restaurants). Restaurants are more likely to use external training,possibly as a result of limited resources and facilities.Furthermore,hotels by virtue of being spread across a number of disciplines may have a requirement for more theoretical training which is provided in the place of employment in the hotel.

TABLE 18 Type of training undertaken (%)

Type	Inhouse	External	Mixed	Number	%
Hotel	29	21	50	14	70
Rest.	21	37	42	19	63
Av.	24	30	46	33	66

Is further training obligatory ?

Training is considered to be obligatory by 30 per cent overall,comprising 23 per cent of hotels and 67 per cent of restaurants.

Are there penalties for non-achievers ?

On the question of penalties for non-achievers in training a surprising 12 per cent stated that there were penalties. Hotels are twice as likely to have penalties than restaurants. The forms of penalty - all equally likely - being promotion;financial or being 'let go'. The numbers resulting from the cross-tabulations were very small possibly reflecting a reluctance to identify with failure on top of a less than maximum 100 % need for training.

TABLE 19 Are there penalties for non-achievers ?

Business	Yes %
Hotels	30
Restaurants	33
Average	38

Looked at another way,of the 30 per cent who consider further training obligatory,only 38 per cent invoke penalties for non-achievers,suggesting an indifference or possible reluctance to enforce regulation of standards and wuality of performance.

The main reasons given for lack of enforced training were as a result of staff already being trained (37%),or because staff could not be forced into training (37%),if they were not motivated to do so. Where penalties were not enforced,it was as a because of their potentially demotivating influence,which again suggests that certain employers are prepared to accept less than best standards.(27% of respondents).

Are incentives offered for further training ?

In contrast to penalties,respondents were asked if incentives were offered for further training. Of those who responded,63 per cent offered incentives,the form of which mirrored those penalties imposed.

TABLE 20 Types of incentives and penalties (%)

Form	Finance	Time	Promote	Let go	Other
Incent	62	19	19	0	0
Penalt	14	0	43	29	14

Where incentives were not available,only two reasons were offered,these being either - not necessary (78%),or -unaffordable (22%). Restaurants were more likely than hotels to consider incentives unnecessary,whereas more hotels considered they could not afford the incentives.

TABLE 21 Why no incentives (where not offered)

Business/Reason	Not necessary (%)	Can't afford (%)
Hotel	70	30
Restaurant	84	16

In the face of the small response (22 out of the 50) who offered incentives for training,they were more likely to be offered by restaurants (50%) rather than hotels (35%),restaurants offering promotion as an incentive exclusively,otherwise there was little difference between the two sectors as to financial incentives.

What specific qualifications would you consider most appropriate for someone on your marketing staff ?.

Two thirds of respondents could or would not respond to this question,but of those who did,degrees are far preferred to other academic qualifications (by 53% of respondents). Over 75% of hoteliers stated a preference to some qualification as against 50% of restauranteurs,otherwise there was a similar configuration as to the type of qualifications preferred.

TABLE 22 Academic qualifications preferred

Business	Degree	Diploma	Cert	Overall
Hotel	35	35	4	75
Rest.nt	30	17	3	50

What professional qualifications are preferred.

20 per cent of respondents did not reply to this question. In fact only two variables were expressed,namely experience and education. Experience being the overwhelming factor required when it came to 'professional' qualifications,(85% as compared to education at 15%). Further breakdown shows a small difference between the two businessesas the table indicates.

TABLE 23 Professional qualifications preferred

Business	Experience	Educational
Hotel	65 %	15%
Restaurant	70 %	10%

What personal qualifications are preferred.

Again 20 per cent of respondents had no answer to this question. When it comes to personal qualifications however,as might be expected,a greater preference is shown for personality;followed by friendliness,then attitude and lastly appearance.

TABLE 24 Personal qualifications preferred

Business	Person'lty	Friend's	Attitude	Appearnce
Hotel	55 %	5 %	5 %	15 %
Rest.nt	17 %	23 %	17 %	23 %
Av.	40 %	20 %	25 %	15 %

The table however indicates that personality was preferred by hoteliers,more so than all others collectively. Restaurants were equally divided between friendliness and appearance,personality and attitude. A suggested conjecture is that the nature of the tasks performed within a hotel,demand flexibility,whereas within the narrower confines of a restaurant,there is limited scope for the same degree of personal dealings and that a more even mix of defined skills would apply.

Does your company prepare a separate budget for marketing a activities ?

Overall 52 per cent claimed to prepare a marketing budget,and that this was on the basis of a 'task by task'approach.

The breakdown between hotels and restaurants suggests that hotels are more limited in their approach to establishing a marketing budget,suggested by the 18 per cent who use the 'same as last time' method,and in turn the restaurants are more inclined to consider their budget on the basis of what can be afforded,and all that that may suggest as regards limitations. For both types of business the task by task approach is most favoured.

Interestingly,for hotels association of a marketing budget with respect to profit did not emerge.

TABLE 25 Existence of a marketing budget

Business	Yes	No
Hotel	52 %	48 %
Restaurant	55 %	45 %

TABLE 26 Basis of marketing budget

Bus.	Sales	Profit	Task	SALT	Afford	None
Hotel	36 %	0	36 %	18 %	9 %	0
Rest.	27 %	7 %	40 %	7 %	13 %	7 %
Av.	31 %	4 %	38 %	11 %	11 %	4 %

What effect do marketing decisions have on the following activities ?

The scoring for this question ranged from 'very influential'to 'not at all influential'.The highest mean score was given to 'Accommodation',followed by 'sales',then'customer amenities and so on (see Table 27).

Accommodation obviously was not considered by restauranteurs and hence is only valid for one segment of the sample.

Likewise,'activities'would be scored only by those companys that offered activites as part of their product,such as sports complexes and functions rooms.

The three core aspects of the businesses surveyed comprise sales,customer amenities and catering.

Given the nature of the survey,which at this stage in the questionnaire was probably identified by the respondents it is instructive to see the ranking for those aspects which deal with personnel,staff recruitment and job design. It would appear that although there is an acknowledgement of the role of service per se,that the relationship and dependence on staff and how they carry out their duties,is not so influenced by marketing. Rather,people take second place to physical assets. Following on this theme,three sectors may possibly be identified,comprising:

1.Sales;customer amenities;catering/accommodation.

2.Activities;functions.

3.Personnel;staff recruitment;job design.

Perhaps not surprisingly,business hours was least influenced by marketing decisions,being constrained by industry laws.

TABLE 27 The effect of marketing decisions (1 = high,5 = low)

Activity	Mean score	S.D.	Hotels	Rest
Accomm	1.85	1.2	1.85	-
Sales	2.12	1.1	1.9	2.2
Cust. Am	2.22	1.1	1.95	2.4
Catering	2.24	1.2	2.9	2.1
Activity	2.42	1.2	2.1	2.4
Personel	2.77	1.5	2.7	2.8
Staff.Rc	2.82	1.5	2.95	2.7
Job Design	3.00	1.5	3.1	2.9
Bus. Hours	3.02	1.5	3.3	2.8

TABLE 28 Effect of marketing decisions

Var'bl	V.Inf	Infl.	N/Nor	N.Very	None
Accomm	50	35	-	10	5
Sales	31	45	8	14	2
Cust.A	36	38	4	12	10
Cater	28	48	4	12	8
Act's	17	58	-	17	8
Pers.	15	46	8	8	23
Staf.R	22	36	4	14	24
Job Ds	16	36	6	16	26
Bus.Hr	15	35	13	8	29

The effect of marketing decisions on sales was considered influential or very influential by 75 per cent of respondents.(!6% considering sales not very or not at all influenced). Breakdown between hotels and restaurants was as follows:

TABLE 29 Effect of marketing decisions on sales (%)

Bus.	V.Inf	Infl.	N/Nor	N.Very	N at al	Total
Hotel	47	32	0	21	0	19
Rest.	20	53	13	10	3	30
Av.	31	45	8	14	2	49

As might be expected,sales are influenced,it is no surprise that it is ranked highest overall.

TABLE 30 Effect of marketing decisions on customer amenities(%)

Bus.	V.Infl	Infl.	N/Nor	N.Very	N.at al	Total
Hotel	40	45	0	10	5	20
Rest.	33	33	7	13	13	30
Av.	36	38	4	12	10	50

Again marketing decisions are influential or greater according to 74 per cent of respondents. 22 per cent considering them not very or not at all influenced,applying to 15 per cent of hotels and 27 per cent of restaurants.

TABLE 32 Effect of marketing decisions on catering (%)

Bus.	V.Infl	Infl.	N/Nor	N.Very	N at al	Total
Hotel	30	40	0	20	10	20
Rest.	27	53	7	7	7	30
Av.	28	48	4	12	8	50

The effect of marketing decisions on catering was considered influential by 76 per cent of respondents. Perhaps hoteliers might take note of the lower ranking that they place on catering by contrast to the restauranteurs. It is a common problem that hoteliers have in as much as their clientele do not consider a hotel as a prime caterer in the first instance,rather the question asked is 'where shall we go to eat ?' instead of considering the hotel dining-room first.

TABLE 33 Effect of marketing decisions on activities (%)

Bus.	V.Infl.	Infl.	N/NOR	N.Very	N.at al	Total
Hotel	28	42	0	14	14	7
Rest.	0	80	0	20	0	5
Av.	17	58	0	17	8	12

Of the 12 respondents who answered this question,effects appear to be in the extreme.This applies to both groups of business, marginally more so to hotels.This is not surprising given that hotels are more in a position to offer activities in addition to their normal portfolio of services.In a number of instances,activities are considered to be theme based such as a 'Burns night',or ethnic foods,as well as receptions and parties,and as such would apply to both hotels and restaurants.

Personnel,staff recruitment and job design were the last three areas for consideration. The question relating to these particular areas was separate from the other immediately preceding section. The objective here was to allow time for reflection by the respondent and to give pace to the interview. Although no test was conducted,these factors,it is felt,may have an effect on the scorings here,which are lower.

TABLE 34 Effect of marketing decisions on personnel (%)

Bus.	V.Infl	Infl.	N/NOR	N.Very	N at al	Total
Hotel	14	43	14	14	4	7
Rest.	17	50	0	0	33	6
Av.	15	46	8	8	23	13

The number of non-responses was high,only 13 actually answering this question. Still of those who did,62 per cent considered the effect of marketing decisions on personnel,to be influential or greater. Again there appeared to be a polarisation of opinion,where the effect was either at one extreme or the other.

TABLE 35 Effect of marketing decisions on staff recruitment (%)

Bus.	V.infl	Infl.	N/NOR	N.Very	N at al	Total
Hotel	30	15	10	20	25	20
Rest.	17	50	0	10	23	30
Av.	22	36	4	14	24	50

Only 58 per cent considered the effect of marketing decisions to be influential or greater on staff recruitment. In fact 38 per cent considered them to be not very or not at all influenced. Surprisingly this latter figure applied more to hotels than restaurants,where only 45 per cent of hotels staff recruitment was influenced by marketing decisions.

TABLE 36 Effect of marketing decisions on job design (%)

Bus.	V.Infl	Infl.	N/NOR	N.Very	N at al	Total
Hotel	20	20	10	25	25	20
Rest.	13	47	3	10	27	30
Av.	16	36	6	16	26	50

Only 52 per cent considered job design to be influenced or greater, a low value overall for the effect of marketing decisions. As with staff recruitment,job design appears to be more influenced by marketing in restaurants than in hotels.This may again reflect the nature of the business in restaurants and the all-pervading influence of the customer/staff relationship.

TABLE 37 Effect of marketing decisions on business hours (%)

Bus.	V.Infl	Infl.	N/NOR	N.Very	N at al	Total
Hotel	20	15	5	15	40	20
Rest.	7	50	17	4	21	28
Av.	15	35	13	8	29	48

The least influenced,by virtue of legal operational hours. However even at 50 per cent,a number of respondents operated their business against a very defined daily routine,particularly those catering for evening customers. This flexibility tended to be more available to smaller,more specialised restaurants with a regular identifiable clientele. Hoteliers tended to be either aware of business patterns across the day and to identify with them (40%) or to ignore them,rather seeing their business as needing to be open all hours.

Marketing decisions was only responded to by hotels and so can be considered only in that context. 85 per cent considered accommodation to be influenced or greatly influenced by marketing decisions,however at the other end of the scale,only 15 per cent considered accommodation to be not,or not very influenced by marketing decisions.

Accommodation was only responded to by hotels and so can be considered only in that context. 85 per cent considered accommodation to be influenced or greatly influenced by marketing decisions,however at the other end only 15 per cent considered accommodation to be not,or not very influenced by marketing.

TABLE 38 Effect of marketing on Accommodation

Bus	V. Infl	Infl.	Not very	N.at all	Total
Hotel	10	7	2	1	20
%	50	35	10	5	100

Has your company undertaken any marketing research in the recent past ?

Research was conducted by only 27 of the 50 respondents. The occasion of past research being presented below. The average time of conducting the research was 7 months ago,but nearly half of respondents claimed research was conducted within the last 3 months.

TABLE 39 Occasion of last research

Months ago	Number	Hotels %	Restaurants%
1	1	0	3
3	12	40	13
6	4	5	10
12	9	35	7
Over 12	1	0	3
None	23	20	63

What was the topic of this research ?

Just three major classifications emerged as topics for research,these being cusomers (48 %);product (36 %) and price (16 %). Nearly half of all research was on the topic of customers,featuring such characteristics as age,numbers,choice and satisfaction. Product could refer to any aspect of the business,such as accommodation,entertainment,activities etc.

TABLE 40 Topic of research %

Business	Customer %	Product %	Price %
Hotels	57	29	14
Restaurants	36	45	18
Av.	48	36	16

Hotels,it would appear,are more concerned with their customer profile,whilst restaurants concentrate more so on product.

Who conducted the research ?

There was a tendancy for respondents to conduct the research themselves (69 %),rather than use an outside agency. Only one respondent claimed to use both internal and an agency in conducting research.

TABLE 41 Who conducted the research (%)

Business	Self	Agency	Both	Total
Hotels	60	33	7	15
Rest.	82	18	0	11
Av.	69	27	4	26

A considerable amount of research consists of simply visiting other premises,sampling food etc. This form of 'hands-on,ongoing ,informal research was claimed as legitimate research by many respondents. A more accurate estimate of how many actually conducted research in the formal sense,may be established by just looking at the figre for outside agency use therefore.

What proportion of your marketing budget is spent on marketing research ?

TABLE 42 Proportion of marketing budget spent on marketing research.

Amount	Percent	Hotels	Restaurants
Up to 1 %	53	47	60
Between 1-2	6	5	7
" 2-3	3	5	0
" 3-4	3	0	7
" 4-5	9	12	7
" 5-10	6	0	13
" 10-20	9	18	0
" 20-30	3	5	0
" 30-50	6	5	7
		Tot.17	Tot.15

When it came to the amount spent on marketing research,the greater number interviewed (53 %),claimed to spend between none and one per cent. There was a variety of answers to this question,some indeed to be treated with suspicion,considering that a number of companys last undertook research over 12 months ago,yet still claimed to spend sometimes major proportions of their marketing budgets on marketing research. Additionally,a number of respondents,on probing admitted they did not know the percentage figure. There was a feeling also that had respondents been asked what the marketing budget actually,a similar result would have been the case.

It is probably more realistic to suggest that the sums expended on research is very small,tending to be in the province of the larger hotels.

Why do you see your most important competitor as such ?

TABLE 43 Why important competitor seen as such.(First and second competitor).

Reason	1st Comp	2nd Comp	Hotels % 1st	Hotels % 2nd	Rest. % 1st	Rest. % 2nd
Location	28	29	32	37	26	23
Market	22	34	21	32	22	36
Product	33	20	32	16	33	23
Standards	9	7	11	5	7	9
Price	9	10	5	11	11	9
Total			.19	19	27	22

Although the criteria for the first and second competitors appears to change between product/location and market/location,there was a great consistency in that respondeents measured competition against similar criteria. Where differences arose between first and second competitor,the reason appeared to be the lack of a similar competitor in the locale. Hence location would nearly always be considered in association with an other variable. The exception is where a particular product is offered to a mobile consumer segment,so that location is more relative than relevant.

Do you differentiate your service mix from that of your competitors ? and if so on what basis ?

TABLE 44 Basis of differentiation

Basis	%	Hotels	Restaurants
Product	31	29	32
Service	33	36	32
P.R.	14	21	9
Quality	6	0	9
Market	14	14	14

There is considerable overlap in that a number of respondents highlighted a 'personal'emphasis in connection with service. Furthermore,stress was laid on developing almost an intimate one-to-one relationship with customers -an aspect which appeared to emanate from and depend on the personality of the owner,(from the owners point of view).

Does your company apply the principles of niche marketing ?

TABLE 45 Basis of niche marketing (%)

Basis	%	Hotels %	Restaurants%
Age	8	0	17
Commercial	31	33	28
Income	17	11	22
Class	14	17	11
Markt Size	3	5	0
Product	28	33	22
Total No.		18	19

74 per cent of respondents apply niche marketing as above. Respondents who claimed to differentiate from the competition tended to score more highly in such areas as market segment

effectiveness and higher effectiveness scores were given to the areas of product and service (32 % and 34 % respectively).All other basis variables achieved between 6 % and 14 % only. Crosstabs between forecasting and competitor and customer research did not suggest that the industry as a whole has a particularly identifiable policy towards information gathering and analysis.

Restaurants,rather than hotels target their customers on the basis of age (i.e. product,theme or entertainment),whereas hotels target commercial business customers (as do restaurants),or alternatively on the basis of product or classification of hotel.

In this instance,as might be expected,both types of business see what they have to offer as a form of complimentary package. In such a case it is only in an effort to understand the industry,that different elements are highlighted. Thus each aspect can be valued only on a matter of priority,rather than being mutually exclusive. Customers in turn are viewed as a more or less complex set of identifiers,some of which are more important than others. For example,class is more important for hoteliers as is potential market size,whereas income is of more immediate relevance to restauranteurs,possibly as a result of 'immediacy'or length of the client/company relationship and the relative expense incurred by the client,during that period.

Please rank the most important sources of information used in developing your business plans ?

TABLE 46 Ranked souces of information for use in developing business plans.

Source	Score	Hotels	Restaurants
In-house sales	8.2	7.8	8.4
Primary research	5.0	5.0	5.1
Secondary research	5.0	5.3	4.8
Unsolicited Information	6.8	6.6	6.9

Just over 50 per cent of the sample scored in-house sales and unsolicited information,at 7 or more,whereas 50 per cent rated both primary and secondary research at 5 or below.(10 highest-1 lowest).This continues to reflect the poor status of research within the industry.

Many times during the course of the survey,the opinion was formed that many managers tended to seek information and pursue methods which reinforced their own perceptions. Rather than seek alternative solutions more suited to their own particular problems,particularly resulting from scale,they tended to resort to standard or accepted 'panaceas'and to hide behind stereotypical judgements,such as "I know my customers",or "I have years of experience",and so on.
In-house sales are considered most important as sources of information when developing business plans.

Although there was little difference overall,primary research tends to be valued by hotels at either above average or not at all. Restaurants tending to be more indifferent.

Hotels rank secondary sources such as desk research more highly than restaurants - possibly as a reflection of availability of larger numbers of staff and/or the existence of a marketing department -to conduct the research.

Restaurants are more inclined to value unsolicited information,especially customer comments (as would be the nor in a restaurant),again refelecting the 'immediacy'of the experience and the 'hands-on'relationship between patron and client.

This may be of concern,given the overwhelming dependance of restauranteurs to concentrate on the 'product',essentially significant though it may be,at the expense of ever increasing subtle changes in consumer profile,habits and preferences.

Please indicate the importance to your company of the following promotional activities.?

TABLE 48 Value of promotional activities.

Activity	Mean score	S.D.	Hotel	Restaurant
Media ads	6.0	2.8	6.4	5.8
Personal selling	8.3	1.6	8.7	8.0
Direct mail	5.1	3.1	5.6	4.8
Exhibs/ Trade fairs	3.6	2.8	5.0	2.7
Public relations	7.2	2.5	6.7	7.5

Personal selling ranked highest at 8.3 for both sectors. No respondent ranked personal selling at less than 4 out of a possible 10. This was closely followed by public relations at 7.2,(the only area ranked higher by restaurants over hotels). There appears, in this connection to be a considerable overlap and possible confusion by the industry,as to what actually constitutes public relations. A considerable number of respondents appeared to view it as simply asking customers if 'everything is all right ?'

By virtue of a larger budget or potential market and product base,hotels tended to rank media and exhibitions higher than did restaurants. A point of interest however is the fact that certain restauranteurs are employing direct mail and customer loyalty programmes to very good effect. A practice made increasingly possible to make effective by developing data bases and more sophisticated and cheaper personal computing technology.

How do you rate your company against your nearest (mentioned) competitor on the following aspects. ?

TABLE 49 Rating against nearest competitor.(%)

Aspct	V.High	High	Average	Low	V.Low	D.K.
Ser. Range	38	52	8	-	-	2
Man. Ablty	36	48	14	-	-	2
Staff Skill	18	66	14	-	-	2
Cust. Orien	34	48	16	-	-	2
Prems Decor	18	38	38	4	-	2
Proms	16	24	38	16	4	2
Price	24	46	24	2	-	4
Res.	4	28	36	18	6	8

It may be interpreted as a matter of defence,that respondents rated themselves as highly as they appeared to do,against their nearest (mentioned) competitor. Again one has to be somewhat cautious as to the scoring of,for example, service range,as at this stage of the interview it may be presumed that the respondent has been well primed as to the emphasis of the survey.

The same may be said of 'management ability' and 'customer orientation',however a touch of realism appeared to creep in regarding less defensible areas of business,such as 'decor and promotions' - not scoring so highly.(This interviewer was able,for example to see the state of decor). Research by competitors,to a large extent,is an unknown quantity and is possibly the case overall,the scoring is a matter of individual perception,rather than firm knowledge.

How do you rate your company against your neareast competitor on the following aspects.?

TABLE 50 Rating of company against nearest competitor

	Bus.	V.High	High	Av.	Low	V.Low	D.K.
Ser	Hotel	55	25	20	0	0	0
Range	Rest.	28	72	0	0	0	0
Av.		38	52	8	0	0	2
Man	Hotel	55	30	15	0	0	2
	Rest	24	62	14	0	0	0
Av.		36	48	14	0	0	2
Skl	Hotel	25	60	15	0	0	0
	Rest.	14	72	14	0	0	0
Av.		18	66	14	0	0	2
Cus	Hotel	40	35	25	0	0	0
	Rest.	31	59	10	0	0	0
Av.		34	48	16	0	0	2
Pms	Hotel	10	35	45	10	0	0
	Rest.	24	41	35	0	0	0
Av.		18	38	38	4	0	2
Pro	Hotel	20	20	45	10	5	0
	Rest.	14	28	34	21	3	0
Av.		16	24	38	16	4	2
Prc	Hotel	30	35	35	0	0	0
	Rest.	21	55	17	3	0	0
Av.		24	46	24	2	0	4
Res	Hotel	0	31	31	26	11	0
	Rest.	7	30	44	15	4	0
Av.		4	30	39	20	7	8

In comparing the competition ratings by business (Table 50),the differences between hotels and restaurants may be seen. In particular on service range,restaurants score themselves overall,where hotels tend to consider themselves very high (55%). Management ability follows a similar distribution,but with more restauranteurs considering themselves on average with competition. Differences in staff skills,customer orientation and

promotion were not so apparent,as was the case with price/value,but still here hotels tended to rate themselves more highly,than did restaurants.
On the question of rsearch,the restauranteurs rated themselves more highly than hotels,with respect to competition - but the suspicion of awareness still applies.

Crosstabulating the prime reason for business against reason for first or prime competitor indicates a rank order that against sales (the prime reason,product 34%,location 28%) and then market segment,were the main criteria. These ratings varied only slightly when compared against the second competitor. Here market segment was ranked first and may only reflect variety of answer on the part of the respondent,in addition to a considered rational reason.

TABLE 51 Prime reason for 1st competitor

Reason	Business	Location	Market.Seg	Product
v's	Sales	28	22	33

TABLE 52 Prime reason for 2nd competitor

v's	Sales	29	34	20

In comparison with their nearest mentioned competitor,hotels were inclined to rank themselves very highly - more highly than restauranteurs,in the areas of service range,management ability,staff skills, customer orientation,promotion and price. Hotels only ranked themselves less that restaurants in the areas of premises/decor and research.

One of two interpretations may be concluded from this set of questions. Firstly the sample was particularly fortunate in selecting the most copmpetitive of hotels,or alternatively,as stated before,the industry is either purposefully complacent or actually doesn't know how it compares. The data suggests that restaurants are almost equal in their competitve perceptions when one takes the comparative rankings of 'high'plus'very high',against competition.

Please indicate the extent to which you agree/disagree with the following statements.

A salesperson should have the companys best interests at heart.

TABLE 53

Bus.	S.agree	Agree	N/nor	Disagree	S.Dis.
Hotel	65	30	5	0	0
Rest.	53	40	0	7	0
Av.	58	36	2	4	0

The prime consideration is to keep the customer satisfied.

TABLE 54

Bus.	S.agree	Agree	N/nor	Disagree	S.dis.
Hotel	85	15	0	0	0
Rest.	70	27	3	0	0
Av.	76	22	2	0	0

Our customers may view us as experts and expect us to make decisions on their behalf.

TABLE 55

Bus.	S.agree	Agree	N/nor	Disagree	S.Dis.
Hotel	35	30	25	10	0
Rest.	10	53	23	13	0
Av.	20	44	24	12	0

Selling is vital so sometimes corners get cut.

TABLE 56

Bus.	S.agree	Agree	N/nor	Disagree	S.dis.
Hotel	5	30	10	50	5
Rest.	3	23	3	60	10
Av.	4	26	6	56	8

Because customers are reluctant to complain there is a danger that we don't know when we are wrong.

TABLE 57

Bus.	S.agree	Agree	N/nor	Disagree	S.Dis.
Hotel	35	40	0	20	5
Rest.	7	53	13	23	3
Av.	18	48	8	22	4

It's best not to tell our customers what to expect, so they won't be disappointed.

TABLE 58

Bus.	S.agree	Agree	N/nor	Disagree	S.Dis.
Hotel	5	0	5	30	60
Rest.	3	7	7	53	30
Av.	4	4	6	44	42

Overall the sample appears to be well oriented towards keeping their customers satisfied (ranked 1), and having the interests of their customers at heart. (ranked 2).

On the question of being viewed as experts, and the reluctance of customers to complain, there is a touch of similarity in that

there is tacit acceptance that customers may expect decisions to be made on their behalf. However there is an increasing tendancy for customers to complain if they feel justified in doing so. The result hopefully is that business is customer driven. The danger here of course is that customer response (complaint) may be too late and an opportunity is lost.
To a similar extent,cutting corners is not seen as a route to success and that it is better to be 'up front' with what is on offer to the public. Even though there is a double negative to this question,it ,it may be assumed that the interpretation in context is correct. The industry is open to public and legislative/trade scrutiny and would tend to be 'found out' if something were radically wrong.

In terms of differences between hotels and restaurants,hotels tended to be more emphatic in their agreements,but in the same general direction as restaurants.
Two areas stand out however,the idea that guests in an hotel would tend to consider the staff as experts,more so than guests in a restaurant,and that in an hotel context,customers would be more reluctant to complain.
One may surmise that this again is due to the more fragmented relationships between client and staff and that hoteliers should seek every means to acquaint themselves of customer opinion,and not place total reliance on customer 'comment cards,and such like.

What proportion of your staff are employed to deal with the public,face to face ?and how would you rate them in their ability to deal with customers.

TABLE 59

Business	Staff Proportion	Av.Rating (Max 10)
Hotel	68	7.6
Restaurant	63	7.8
Overall Av.	65	7.7

Most respondents have about 60 per cent of their staff dealing directly with the public,the range varying from as little as 10 per cent for one respondent,to a surprising 100 per cent by 4 respondents.

Due to the wide range of answers,(the standard deviation was 20.4),it is difficult to see any consistency and hence value here,except as a rough guideline.

Hotel responses tended to focus on the upper half of the distribution,whereas restaurants tended more towards the middle,suggesting that hotel staff who deal with the public,are required to do so on a more consistent time basis,rather than on just waiting.

Do you ever call upon your staff to perform tasks for which thay are neither formally qualified or trained ?

TABLE 60 Frequency of unqualified tasks

Bus.	Yes (%)	V.Freq	Freq.	N.V.Freq	Total
Hotel	68	0	23	77	13
Rest.	57	12	18	70	17
Average	60	7	20	73	30

As may be seen from the table,hotels are marginally more likly to call upon staff to take on 'additional'duties,over and above their normal tasks,but the frequency of such circumstances is likely to be lower. Such an occurrence may be very frequent in some restaurants,particularly under local rush hous and where the number of staff available is likely to be relatively small.

From the total in the table,only 30 of the 50 respondents answered this question. The circumstances which give reason to the need to perform different tasks predominently arise when staff shortages occur - whatever the cause.

The main reasons for asking staff to take on different duties appears to stem from a desire on the part of management to develop staff experience in different aspects of the business and to deal with customer complaints (as back-up for another staff member).

TABLE 61 Circumstances leading to extra duties (%)

Business	Shortage	Experience	Complaints
Hotel	85	0	15
Restaurants	53	20	27
Average	68	10	21

Over the past 5 years,has the number of customer commendations/complaints risen,stayed the same,fallen ?

On average 63 per cent claimed that customer commendations had risen,while 37 per cent claiomed they had stayed the same and nowhere had customer commendations fallen (Table 62). By comparison 15 per cent claimed that complaints had risen,38 per cent,stayed the same,while 52 per cent had fallen. (Table 63).

TABLE 62 Customer Commendations

Customer commends	Risen	Stayed the same	Fallen
Hotel	65	35	0
Restaurant	62	38	0
Average	63	37	

TABLE 63 Customer Complaints

Customer complaints	Risen	Stayed the same	Fallen
Hotel	25	30	45
Restaurant	7	36	57
Average	15	33	52

There is little difference between hotels and restaurants on the question of commendations,however hotels appear to be unfortunate in that one quarter of them say that complaints have risen,against only seven percent of restaurants. Furthermore,the percentage of reataurants where complaints had fallen exceeds that of hotels suggesting that the restauranteurs must be doing something right,(or think they are),or that diners,for whatever reason are simply not complaining).

Has a formal job specification been drawn up for the following staff functions ?

TABLE 64 Existence of formal job specifications

Function	Overall % yes	Hotel	Restaurant
Marketing	25	43	10
Management	58	74	48
Sales	42	58	31
Personnel	37	53	28

By virtue of the numbers of staff and presumabely extent of assets,hotels figure largely on the question of job specifications,indicated by the proporton of hotels where formal job spcifications have been drawn up for the specific functions listed. Of particular interest is the very low score for marketing within restaurants. It is possible that a number of companies have a manager with a dual or greater number of roles or duties,and under these circumstances marketing might be presumed to be of similar importance as salea. Such would appear not to be the case,the priority being given to operational rather than strategic management functions.
Overall only 47 per cent of hotels look for a minimum qualification for managerial positions,against 66 per cent claimed by restaurants.

Which department is responsible for supervising staff who deal directly with the public ?

Only 44 per cent of respondents answered this question,possibly resulting from the 'funneling'approach from the last question. However of those who did reply,68 per cent claimed that 'management'was responsible,while 23 per cent claimed 'personnel'. This suggests that marketing is relegated to a non-supervisory position or status (i.e.research or P.R.). The breakdown between the two categories of business is as follows:(Table 65).

TABLE 65 Department responsible for supervising staff

Business	Management	Personnel	Sales	Operations
Hotel	46	38	8	8
Rest.	100	0	0	0

What is your main source of recruitment ?

TABLE 66 Main source of recruitment

Source	Overall %	Hotel	Restaurant
Agencies	25	30	21
Word of mouth	46	35	54
Newspapers	29	35	25

Given the variety of skills required,but not the quality or standards,it is somewhat surprising that restaurants appear to depend so much on word of mouth (off the street) advertising to recruit staff. However further research as to the level of staff recruited in such a manner might indicate a high turnover of unqualified personnel,and as with hotels,restaurants might canvass for specific skills through more appropriate agencies directly or filter through media advertising.

What proportion of your customer-staff time is spent dealing directly with the public ?

Again a great variety of responses were given,ranging from 10 per cent to 100 per cent. The mean percentage was 66,woth a s.d. of 23. The distribution was skewed towards the upper half with 42 per cent of respondents opting for between 75 and 90 per cent. This would suggest that the amount of time spent actually dealng directly with the public is considerable,given the nature and variety of tasks required and may properly be described as 'waiting time'under such circumstances. This would present particular problems with regard to staff overheads during 'off-peak periods'especially during the low season for tourism.

TABLE 67 Percentage of customer staff time.

Time	Overall	Hotel	Restaurant
%	66	66	65

As can be seen there is little difference between the two categories of business.

Does your company offer any performance based incentives to your service personnel ?

TABLE 68 Performance based incentives

Overall % (yes)	Hotel	Restaurant
38	35	40

TABLE 69 Basis of performance based incentives (%)

Bus	Yes %	Time	Skill	Qualty	Custs	Rev.	Other
Av.	38	6	22	17	6	44	6
Hot	35	0	17	17	17	50	0
Res	40	8	25	17	0	42	8

Only 36 percent chose to answer this question. Those who did,as might be expected,said the greater amount of incentives are based on revenue earned.

Time and skill are not as important for hotels it would appear,compared with the specific matter of restaurants trying

to deal with dining customers in a more limited time frame. Revenue generation would appear to be a more pervasive occupation in hotels also.
Sheer numbers of customers do not to be considered highly as a basis of incentives in spite of the industry being regularly accused of dealing in 'just numbers'of tourists,rather than a more detailed profile. This limited measurement of numbers may possibly reflect a greater emphasis on skills and quality of service,which in turn are likely to lead to a contented customer and a more accurate reflection of the strengths of the business,be it hotel or restaurant.

The nature of the incentives tend to be financial - just under 90 per cent of respondents rewarding performance on that basis. Other incentives also include financial assistance for further training as well as time off (Table 70).

TABLE 70 Nature of Incentives (%)

Nature of Incents	Financial	Other
Average	89	11
Hotel	86	14
restaurant	91	9

Commision may also reflect the payment system for certain types of employee,particularly the part-time nature or seasonality of the industry.

What is the effect (if any) of these incentives on the following:

TABLE 71 Effect of Incentives

Area	Bus.	V.Great	Great	Some	N/Nor	None
Prof	Hotel	29	43	29	0	0
	Rest.	17	66	17	0	0
	Av.	21	58	21	0	0
Sales	Hotel	14	57	29	0	0
Vol	Rest.	17	67	8	8	0
	Av.	16	63	16	5	0
Staff	Hotel	14	43	0	29	14
Rels	Rest.	25	50	17	0	8
	Av.	21	47	11	11	10
Cust.	Hotel	15	71	0	14	0
Rels	Rest.	25	58	17	0	0
	Av.	21	63	11	5	0
Repet	Hotel	15	71	14	0	0
Custm	Rest.	33	50	17	0	0
	Av.	26	58	16	0	0

Only 38 per cent of respondents answered this question.(19 in total),again as the result of funnelling from previous questions. The effect of an incentive would appear to be greatest as regards repeat custom,other areas such as profit,staff relations and customer satisfaction all scoring the same in average.

Sales volume does not score so well - which wouldbe the case if performance incentives are not based on customer throughput.
The effect of incentive schemes overall appears to be greater for restaurants than for hotels,if for instance one combines great and very great effect. (Table 72).

TABLE 72 Effect of incentives (V.great & great combined)(%)

Bus	Profit	Sales	Staff	Cust.sat	Repeat
Hotel	72	71	43	86	86
Rest.	83	84	75	83	83
Av.	79	79	68	84	84

This applies particularly to staff relations and to a lesser extent on profit on sales.

Interestingly hotels score slightly higher on customer satisfaction and repeat custom,which may signify a marginally greater awareness of hoteliers on their dependence on staff encouraging back satisfied clients and also the value of staff as 'word of mouth'sales people for the hotel.

What is the reason for your companys success to-date ?

TABLE 73 Reason for companys success (%)

Reason	Hotels	Restaurant	Overall Av.
Product	15	30	24
Price	10	7	8
Standards	5	33	22
Staff	45	17	28
Pub.rels	10	0	4
Attitude	15	10	12
Location	0	3	2

Here location scored zero,a very surprising response from hotels,where one might expect that location would be considered a significant variable in the success of the business. Otherwise it would appear from the responses to this question,that hotels are aware of the value of their staff (no distinction as to role or qualification was asked),whereas restaurants are much more dependent or rely on product and standards to achieve their objectives.

By contrast,hotels do not appear to rate the idea of product particularly highly. This may be the result of an inability to single out a major feature from the hotels mix of 'products',or perhaps more significantly,an inability to identify an overall 'product concept',and to market this.

A number of cases identified or acknowledged the role of 'management'in achieving success,a response which was not confined to smaller,family-run hotels only.

What particular external influences affect your company ?

TABLE 74 External (1st mentioned) influences affecting company

1st mention	Hotel	Restaurant	Overall Av.
Tourism	15	21	18
Recession	40	21	29
Competition	10	14	12
Weather	5	10	8
Pers. Income	25	31	27
Transport	10	3	6

As a rsult of the timing of the survey and therelationship between sterling and the punt,it is not surprising that most respondents considered the recession to be most significant in affecting their business.

The spin-off from this is of course personal income and hence spending power,which in turn has a more immediate effect on restauranteurs who are dependent on curent domestic spending patterns,spread more evenly throughout the year.

By contrast,hotels,although noting the effect,identified more closely with the seasonal aspect of the business, i.e. transport, and were more concerned with the past season and the forthcoming season's potential.

References were made to many aspects of the economy, in particular, interest rates, exchange rates and Government policy towards tourism as regards support for the industry.

Weather is more important for restauranteurs (people it seems are more gregarious when the sun shines, and go out more and inclined to act on impulse).

TABLE 75 Which is the most important external influence (%)

Influence	Hotel	Restaurant	Overall Av.
Tourism	28	24	26
Recesion	33	24	28
Competition	0	20	12
Pers. Income	22	28	26
Transport	17	4	9

On further questioning, the most important external influence is still the recession (and tourism generally), however two main differences emerge.

Firstly competition does not rate now for hoteliers, but by contrast transport achieves greater significance.

Secondly it would appear that restauranteurs are much more sensitive to competition, particularly of a local nature, and identify more so with any other food business, be it fast, ethnic or otherwise, in competing for a limited market with reduced capacity to spend.

Although hotels recognise the importance of the obvious recession etc,transport,as a means of access to Ireland,condition of roads and internal transport rate more highly. Both business types mentioned availability of parking and the result of 'drunk driving'legislation as affecting their business.

The effect of these influences is to be seen as follows:

TABLE 76 Effect of external influences. (%)

Effect	No.of Customers	Spending power	Market size	Access costs
Hotels	47	40	0	13
Rest.s	14	57	23	5
O'all Av.	27	50	14	9

The effect as may be seen is in the number of customers and spending power.

Figures again point to the more local nature of the restaurant indicated by the lower number who cited 'number of customers'as being affected and the number who mentioned 'market size',(with no mentions from the hotels).

On reflection however this reference to market size is to the domestic market in particular and the effect on a potential,largely domestic market rather than the restauranteurs ability to appeal to a wider global market segment.

Hoteliers,as might be expected,look to a wider global market generally.

How has your company performed in the last year, in comparison with the previous 5 years, say on average ?

This question was asked over three specific variables, namely profit, sales volume and market share.
Between performance on profit and sales volume, there was little difference.

Market share percentages have to be viewed carefully as a large percentage of respondents had to be persuaded to 'guesstimate' a rating, as they appeared genuinely not to know what their performance was on this variable. (Table 77).
Overall hotels appear to be succeeding more effectively than restaurants, but however one might be prepared to accept their findings or perceptions, the suspicion remains that quite a number of respondents, either through lack of knowledge, or unwillingness, volunteered a rating which may or may not reflect actuality.

TABLE 77 Performance of companys in the last year, by comparison to the previous 5 years, on average. (%)

Variable	M.Better	Better	Same	Worse	M.Worse
Profit	15	31	31	17	6
Sales.V.	14	31	35	14	6
Markt.Sh	0	41	46	11	2

TABLE 78 Performance of the two types of business on PROFIT, in the last year by comparison with the previous 5 years on average

Profit	M.Better	Better	Same	Worse	M.Worse
Hotels	21	32	21	21	5
Rest.s	10	31	38	14	7
Av.	15	31	31	17	6

TABLE 79 Performance of the two types of business on SALES in the last year by comparison to the previous 5 years on average

Sales	M.Better	Better	Same	Worse	M.Worse
Hotels	20	40	20	15	5
Rest.s	10	24	45	14	7
Av.	14	31	35	14	6

TABLE 80 Performance of the two types of business on MARKET SHARE in the last year, by comparison to the previous 5 years, on average

Markt Sh	M.Better	Better	Same	Worse	M.Worse
Hotel	0	42	53	5	0
Rest.s	0	41	41	15	4
Av.	0	41	46	11	2

Have any new facilities been introduced, specifically with your customers in mind ?

TABLE 81 Introduction of new facilities

Business	Yes %	No %
Hotels	95	5
Restaurants	73	27
Overall average	82	18

Nearly all hotels had introduced new facilities of one kind or another, compared with 73 per cent of respondent restaurants.

The average date of introducing the facilities was 25 months ago. In fact only 9 per cent of facilities had been introduced within the past 6 months. (The modal age was just one year).

TABLE 82 The difference between hotels and restaurants as regards age of facilities.(%)

Age (Months)	Hotels	Restaurants	Average
Up to 3	0	5	3
" 6	13	0	6
" 11	7	0	3
" 12	33	25	29
" 18	7	5	6
" 24	7	25	17
" 36	33	10	20
" 48	0	20	11
" 60	0	10	5

The facility options for hotels would appear to be greater,however the nature of the facilities could be generally classified on a similar basis for both types of business. These were as follows:(Table 83).

TABLE 83 Nature of facilities

Nature	Hotels	Restaurants	Overall Av.
Product	5	9	8
Decor	22	18	20
Accomm	11	17	12
Activities	5	0	2
Gen.Facilit	56	59	58

'Product'was more important for restaurants,i.e.private dining-room,bars etc. General facilities could include,for both types of business,new toilets,kitchens,function rooms,particularly dealing with aspects of catering,and alcohol consumption.

There appears to be a general tendency to upgrade,especially for business clientele - instanced by the 'private' nature of some facilities-again,dining-rooms,bars,conference suites and business facilities such as fax etc.

General renovations (decor) figured quite highly,and from the form of responses,upgrading decor is expected to be approved by clientele,rather than being taken for granted.

The effect of these facilities on PROFITS were as follows,

TABLE 84 Effect of facilities on profits

Profit s%	M.Better	Better	Same	Worse	M.Worse
Hotel	22	39	39	0	0
Rest.s	23	36	32	9	0
Av.	23	38	35	5	0

The effect of these facilities on SALES VOLUME were as follows,

TABLE 85 Effect of facilities on sales volume

Sales V.	M.Better	Better	Same	Worse	M.Worse
Hotel	22	55	22	0	0
Rest.s	23	27	50	0	0
Av.	22	40	38	0	0

The effect of these facilities on MARKET SHARE were as follows,

TABLE 86 Effect of facilities on market share

Markt Sh	M.Better	Better	Same	Worse	M.Worse
Hotel	17	39	44	0	0
Rest.s	14	52	33	0	0
Av.	15	46	39	0	0

The effects are much the same as regards profit,but better for hotels regarding sales volume. The same caveat applies regarding market share as before. Apart from the obvious comment that profits would be down if monies had been spent on new facilities,there would seem to be little formal analysis of the effect of introducing new facilities other than a rule of thumb judgement. In a similar vein,respondents were asked,

Has your company introduced any new personnel practices,specifically with your customers in mind ?

Here 46 per cent replied 'yes',comprising 55 per cent of hotels,and 39 per cent of restaurants. The age of the particular 'practice'was found to be as follows;

TABLE 87 Age distribution of personnel practice

Age	Hotel	Restaurant	Overall Av.
< 2 months	0	14	8
< 12 "	33	43	39
< 24 "	33	29	31
< 36 "	33	14	23

As may be seen, of those who have introduced new personnel practices, 57 per cent of restauranteurs did so within the past 12 months, compared with one third of hotels.

Generally, the type of personnel practices tend to be in the area of ongoing training, in relation to specific service skills, and with behaviour-related activities, such as appearance and attitude to customer service.

TABLE 88 Type of practice(%)

Practice	Hotel	Restaurant	Overall Av.
Training	45	27	36
Appearance	0	18	9
Performance	18	37	27
Behaviour	37	18	27

restaurants are inclined to put emphasis on speed and efficiency whereas hotels put more emphasis on the broader aspects of training, such as customer care programmes.

The effects of the personnel practices programmes were as follows;

TABLE 89 Effect on profit

Profit	M.Better	Better	Same	Worse	M.Worse
Hotel	30	30	40	0	0
Rest.s	9	64	27	0	0
Av.	19	48	33	0	0

TABLE 90 Effect on sales volume

Sales V.	M.Better	Better	Same	Worse	M.Worse
Hotel	20	70	10	0	0
Rest.s	9	64	27	0	0
Av.	14	67	19	0	0

TABLE 91 Effect on market share

Markt Sh	M.Better	Better	Same	Worse	M.Worse
Hotel	30	40	30	0	0
Rest.s	9	55	36	0	0
Av.	19	48	33	0	0

The effect of personnel practices was more strikng than those for new facilities,particularly it would seem for hotels. Here again it is possible that the nature of the tasks and the organisation of the business within the hoter context would give rise to greater awareness of the effectiveness of any programme and that smaller businesses would not have in place,formal methods of analysis,and hence rely heavily on 'gut feeling'overall.

Is your company affiliated to any professional organisation ?

In answer to this question,90 per cent replied yes,which comprise 95 percent of hotels and 86 per cent of restaurants.

TABLE 92 Ist and 2nd affiliates (%)

Affiliate	1st mentioned	2nd mentioned
Dublin Tourism	19	26
Rest.Ass. of Irl	25	12
Bord Failte	27	12
Licen'd Vin.s Ass.	15	2
Irish Hotel Fed.	15	14

TABLE 93 1st and 2nd mentioned affiliates by type of business

Affiliate	1st mention	2nd mention	1st mention	2nd mention
Dublin Tourism	5	10	28	35
Rest.s Ass of Ireland	11	10	34	29
Bord Failte	47	10	14	29
Licn'd Vitnrs Ass	5	10	21	0
Irish Hotel Fed.	32	60	3	6

Bord Failte came out as number one spontaneous mention overall for hotels,followed by the Irish Hotels Federation.

For restaurants,the Restauranteurs Association of Ireland was mentioned first,with Dublin Tourism second. Such spontaneous recall may suggest positive implications for Bord Failte in terms of a stratified service support system.

There was a considerable move towards the Irish Hotels federation on the second mentioned affiliation for hotels,whereas restaurants tended to think more widely towards support groups such as Bord Failte.
The Irish Hotel and Catering Institute was also mentioned by two respondents.

How closely do you associate with the first mentioned affiliate

TABLE 94 Closeness to first mentioned affiliate

Bus	V.Close	Close	N/Nor	Not close	Distant
Hotel	32	37	5	11	16
Rest.s	12	38	12	23	15
Av.	20	38	9	18	16

The hotels tend to associate to a greater extent than average,supporting their spontaneous first mention of what might be expected to be their main mentors - Bord Failte and the Irish Hotels Federation.

In what way close association ?

TABLE 95 Form of close association

Way close	Hotel	Restaurant	Overall Av.
Participate	54	82	67
Ad. & Prom	31	18	25
information	15	0	8

Surprisingly this table suggests that restaurants are more likely to participate actively with their association,but only 37 per cent of restaurants chose to answer this question,so one can only infer that where there is an association between business and affiliate,that an active one exists.

Furthermore,restaurants appear not to use their association as a source of information,unlike hotels. This would again suggest the general lack of marketing information networks or greater appreciation than that which exists with hotels.

Due to the fragmented and competitive nature of the restaurant business,perhaps an improved information network system is particularly important ?

Where an association was not considered close,two prime reasons were given. These were;

TABLE 96 Reason for lack of association

Affiliation	Hotels	Restaurants	Overall Av.
N.Apply	40	55	50
No Use	60	45	50

One of the main reasons was that the business was seen to be too small to benefit,or on the other hand,the Association was seen to be too big to apply to the business in particular.

On a more positive note however,the specific benefits of membership were seen to be:

TABLE 97 Benefits of Membership of Association

Benefits	Hotel	Restaurant	Overall Av.
Lobby Group	18	19	19
Ad. & Prom.	59	35	44
Information	6	23	16
None	18	23	21

Most businesses particularly highlighted the role played by their respected associations in generating business for them,i.e.through advertising and promotion,as well as being a lobby group,representing their interests. Of surprise is the number of restaurants who now seem to use their association to generate information. However this is more allied to industry,rather than market information.

In your own words,what should the Irish Tourism Industry do,to improve their lot ?

TABLE 98 What Irish Tourism should do

Should do	Hotel	Restaurant	Overall Av.
Improve Stds	21	13	16
Price Comp.	11	20	16
Improve A&P	11	10	11
Improve Image	16	20	19
Imp.Access	5	7	6
Org.Indus.	21	23	23
Improve B.F.	16	7	10

The objective of this question was to allow the rspondent an opportunity to highlight their own areas of grievance,or optimism which they did so in the main,it is suspected,with a little 'tongue in cheek'.

The responses were classified into the main areas as listed. Comments were offered in the general,no respondent identifying a personal or specific role for thier own sector. The emphasis

was on what could be done for the industry,rather than anyone offering a role for themselves whilst attacking issues beyond their own doorstep. This is possibly as a result of the way the question was phrased,but largely,it is suspected,as a result of the fragmented,personalised nature of the business.
Organising the industry and improving standards ranked uppermost,followed by the improvement of the industry image overall. All aspects of the tourism industry were mentioned for reorganisation from products,price,employment,standards to transport,access and local and regional development.

On the negative side,it was suggested by some,that the industry representative organisation,Bord Failte,be removed or replaced,again a case of hitting widely,but with little or no alternative offered.

SUMMARY OF RESEARCH FINDINGS

Marketing Emphasis

There is a great umderlying dependence on the domestic market for the total industry across the year. Hotels place greater emphasis on the international tourist,no distinction being made between trippers'from Northern Ireland or long-haul travellers,such as across the Atlantic.

Although there is obvious concern with sales,however there is a latent awareness of the necessity to do more than pay lip service to other potential aspects of the company's product-market mix. This may be instanced by the proportions of respondents who identified with training,promotion and quality,but unfortunately not research.

An acknowledgement of the effectiveness of a service identification,generally and the need to target specific segments is widespread,but the structures and willingness (or ability),to identify and actively pursue a wider portfolio of strengths is not apparent.

In particular,individual companies do not appear to undertake analyses for themselves,nor to take a pro-active approach to marketing.

As was seen later on in the survey,this is in part due to lack of expertise,lack of finance and the small numbers of staff. This results in an apparent willingness to leave such tasks to others - all largely stemming from the small size of the individual companies.

The size of the workforce generally suggests a number of implications for the industry and which were borne out by later comments from respondents.

Specifically it indicates:

1.The need for flexibility in skills,perhaps across a number of boundaries.

2.Management levels are lower down in the organisation hierarchy,with fewer strata of management.

3.There is less time for management to separate themselves from the operational side of the business,in order to concentrate on planning.

4.The need for planning is not so pressing as the individual company considers itself to be not so dependent on a large,dynamic market.

5.The small size of the organisation limits the potential for expansion,fewer resources (especially finance),being available from within the company.

6.Many businesses are family run,with the resulting reluctance to share authority with non-family members.

7.A certain degree of complacency as to the possibility of maximising the true potential of the company,which in turn remains an unknown quantity.

8.Demands placed on management by the operational sside of the business leave little time for an appreciation of the potential marketing input.

9.A desire to 'hive off'responsibility,for practical and theoretical marketing to some third party,but without any true acknowledgement of the individual's own role and responsibnilities to work in positive association with the various industry bodies that have necessarily been set up to assist with the above mentioned areas.

Very few companies have a marketing department,(even in name only). This highlights the essential tasks that are currently performed by wider industry agencies,and especially by the State Bodies,on behalf of their associate members.

However the relationship seems to be one of dependence on the part of the members. This appears to be the norm rather than active participation.

One might expect greater responsibility would be assumed by the individual company in order to achieve a more certain and greater success for themselves. (Perhaps more structured consultancy in association with a marketing specialist,who is responsible for managing a specific portfolio of companys,with emphasis on information,guidance,education and general encouragement of individual responsibility for marketing may be part of the answer).

GENERAL MARKETNG EMPHASIS

There is great emphasis and dependence on experience and friendliness,however it would appear that there is no shortage of either. What is required is experience in research,analysis and decision-making.

In order to satisfy existing customer demand,training,wherever necessary,is available,both within the company and by external education and through industry. This training is encouraged and rewarded while failure is not condoned.

When it comes to qualifications for their marketing staff,managers look to a diploma or degree level. But even here,experience would seem to count for more. Emphasis is placed on maintenance and operational standards,rather than strategic development of individual businesses.
Where a budget exists,marketing is funded on a 'task by rask' basis. With the exception of larger organisations,possibly as a result of a lack of coordinated planning in effect,rather than a strategic identification of investment opportunities.

The effect of marketing decisions varies,being greatest on sales,be they as arsult of a 'personal-service'nature such as accommodation,catering and so on,but having less influence on personnel,staff recruitment and job design. At this point it becomes more evident that marketing is seen to consist largely of selling,advertising and promotions,rather than an all-pervasive philosophy in practice.

Marketing research - or lack of it,would tend to corroborate the suspicion that little 'formal'marketing of any kind,is undertaken by any but the larger companys and that much dependence is placed on subjective perception by owners and managers - hence the variety of answers given as to the timings and proportion of marketing budgets allocated to research.

COMPETITOR EMPHASIS

Competition is viewed from the standpoint of product and location. In many cases it seems that location and market are synonymous (a few speciality houses excepted).

Acknowledgement of the 'personal'input of managers is striking where great reliance is placed on individual knowledge and abilities (whether as a result of loyalties or genuine achievement is not known).

On whatever basis is selected,niche marketing is readily acknowledged and where applied,is successful. Specific profiles were not requested in the survey,but generalities offered during discussions sugests that a certain underlying knowledge if not application exists.
Company research,largely consists ot bookings,receipts and general discussions with clientele rather than 'formal'research.

Research must obviously be quantified as to potential value and in hindsight,further investigation into possibilities for research might indicate the true feasibility of undertaking any specific studies for individual companys or sectors or groups therein. At this point however,it still seems that little objective research is undertaken and the value for the individual is therefore unknown.

As if to highlight the true nature of the industry,when it comes to promotional practices,personal selling was to the fore,closely followed by public relations.

Advertising and direct mail are not seen as significant,however improved telecommunications and computing technology are likely to have increasing impact on individual,direct appeals - particularly to the domestic market,if current activities illustrated are anything to go by.

Exhibitions and fairs are only of value to the bigger organisations serving larger,more widely spread markets.

Where respondents compared themselves to their competitors,the ratings are unexpectedly high. But even accepting that belief in oneself is a prerequisite for success a degree of circumspection was expected as the sample could not have been as good as it appeared to be on this matter. Perhaps a better scoring with regard to research might alter the ratings on all the other variables and result in a more realistic self-appraisal.

CUSTOMER ORIENTATION

In the main,the industry is well aware of and does its best to satisfy its customer needs - even possibly at the expense of the company.
There appears to be a degree of 'ethical commitment' i dealing with customers and an acknowledgement that an acceptable product of sufficiently high standard is important for long-term success. Emphasis is not limited to the quick sale,particularly as clientele are becoming more knowledgeable and although largely reluctant,are tending to complain more.

Around two-thirds of staff are employed to deal with the public,more or less directly,but with great variation between individual companies.
Obviously where duties are more highly structured and defined,there is less variability in performance and measurement becomes more consistent. It is felt that a possible contributor to the variability of this question is the extent of multi-skilling required as a result also of the small size of company and fluctuating demand.
Staff were rated as above average in their ability to deal with customers,but this is not unexpected,rather that they were not rated even more highly.

Even though it might be expected that all staff in every company might be called upon to perform tasks outside their normal duties,the industry does not appear to do so all that frequently - in particular restaurants appear to be more disciplined in this matter-which on reflection may be as the result of a more 'focused'service function,requiring fewer defined skills,performed by identified staff.

It does appear that 'multiskilling'is a recognised from of ongoing training.
The number of customer commendations has risen overall,with hotels showing a greater degree of variation,in the case of complaints,this variation is increased but there is an acceptance that as clients become more experienced and under more pressure to seek value for money,that the number of complaints will also increase. The onus is on the server to upgrade in order to compete more effectively to satisfy his customers - at that chosen level.
Taking into consideration te small number of respondent companies with an existing marketing department along with previous comments,the survey suggests that twenty-five per cent of companys have in place a staff function - marketing for which a formal specification has been drawn up. The only rationale which suggests itself is an extension of the multi-skilling approach where due to small numbers of staff,managers are required to perform across a number of boundaries. Still marketing has the lowest call for a formal job specification amongst the main areas of management.

General management is likely to be responsible for 'service'staff,marketing is not considered as having a direct management input into this side of the business,except perhaps under the guise of 'sales'.
Recruitment appears largely to be two-tiered,where a formal system is employed. Alternatively word goes out to recruit,reflecting more so the nature of the duries,the expertise required and the imposed structure of the company.

As if to mirror the question as to the numbers of staff required to deal with the public (66%),a further 66 per cent of their time is actually spent doing so. Thus 43 per cent of all staff time is spent dealing full-time with customers.
Unfortunately no further explanation was sought to indicate a background to this statistic,i.e.what proportion of customers are dealt with,how often,or alternatively,are customers ever left alone ?

Just over one third of companies provide incentives based on

performance,incentives which are more likely to be revenue based than skill,or quality of service.
The incentives reflect this basis being mainly of a financial nature. The effect of incentives is to improve sales and profit,but appear to have greatest effect on customer satisfaction and repeat business in particular.

ORGANISATIONAL CHARACTERISTICS

Perhaps a more 'telling'response arose as to the reason for the companys success. Staff are primarily acknowledged and recognition is given to attitude of personnel,but there was great divergence of opinion on 'product' and in particular 'standards'. Contrary to previous indications location does not appear so relevant.

Recession and personal spending are the main external influences - all negative,no positive responses being given. Those variables mentioned are outside the control of the individual company (weather,transport etc) the effect being that a degree of pragmatism is seemingly required. Perhaps greater emphasis on planned,informed management might present a more optimistic future at company level and a more cooperative collective industry-wide approach serve to meet the needs of the individual,by better managing the needs of all.

Ignoring market share,about which little was known,the industry appears to have performed better over the last year as a whole,than the previous five years,on average. As an indicator of growth new facilities have been introduced into 73 per cent of respondent companies. A large proportion consists of ongoing updating of existing premises and decor however new facilities are also specifically mentioned. These are designed to respond to new targeted clientele,as well as increasing capacity generally.

Virtually no-one considered the effects of these facilities to be adverse.

Similarly 46 per cent of companies claimed to have introduced new personnel practices. These also tend to be of an ongoing nature (training,behavoiur and so on). The effects of these practices are seen as being positive with respect to profit and sales also.

Only 90 per cent spontaneously considered themselves to be affiliated to a tourist related organisation,that organisation more likely to be either Bord Failte or the Restauranteurs Association of Ireland,as might be expected. Bord Failte,together with Dublin Tourism made up 46 per cent of first mentions overall.

Association with an affiliated organisationis more likely to be close than not close and apply more to hotels than restaurants. It is likely to be participative in nature.

Reasons for lack of association were given as 'lack of relevance' or 'small size of company'.

Overall the industry appears to desire;

1.reorganisation of some nature,in order to improve its image - both at home and abroad,(and it is suspected,within the industry itself),

2.to improve standards overall,

3.to create better price competitiveness,

4.to create better and more effective advertising and promotion.

5.transport was remarked upon for improvement,for both access to Ireland and internal networks,as well as parking and security.

Survey update

While tourism in Ireland in terms of arrival has grown,its share of world tourism has been halved from 2 per cent in 1960 to under one per cent in 1990. This is in addition to a steady decline in average real spend.(Currently standing at 75 per cent of the 1961 figure.

The principal barrtiers to growth in Irish tourism are:- seasonality - concentration on summer months;inadequate profitability;an underdeveloped product range - over dependence on natural attractions;peak season capacity constraints;and access difficulties - inadequate range and frequency. (Tansey Webster Report for the Irish Tourism Industry Confederation.1992).

In terms of manpower,the latest survey undertaken by CERT was in 1993,(completed in 1992),which indicated that the hotel,catering and tourist industry employs 170,907 people,and with a high level of permanent staff (86%).

As regards growth,a 3 per cent increase in the level of employment is forecast for the industry overall,of which 2 per cent is forecast for hotels and guesthouses.

Dublin,with 23 per cent,has more people employed in the industry than any other region.

There is still the problem of non-availability of trained and suitable staff,and which accounts for the main reason for difficulties in recruitment.

There is a high proportion of owner-manager businesses,yet the level of formal training among these owner-managers is low. Multi-skilling,or performing a number or variety of tasks still remains a feature of the industry.

Finally it has been suggested that the tourist industry in Ireland can perform,but it needs a better profit-led investment climate in products and marketing. In addition it needs;
1.central direction to extend seasonal options,
2.a single market image for products and services,
3.concentration on product focused cooperative packages.
(Flannery J.1992.Paper Deliveed at the National Marketing Conference,30th Oct.Marketing Institute of Ireland.pp17-19 and published in Business and Finance.Oct 1992).

APPENDICES

Figure 2 Unique Service Features and Resulting Marketing Problems

Unique Service Features	Resulting Marketing Problems	Selected References Citing Problems
Intangibility	1. Services cannot be stored.	Bateson (1977), Berry (1980), Langeard et al. (1981), Sasser (1976)
	2. Cannot protect services through patents.	Eiglier and Langeard (1975, 1976), Judd (1968)
	3. Cannot readily display or communicate services.	Rathmell (1974)
	4. Prices are difficult to set.	Dearden (1978), Lovelock (1981), Thomas (1978)
Inseparability	1. Consumer involved in production.	Booms and Nyquist (1981)
	2. Other consumers involved in production.	Bateson (1977), George (1977), Gronroos (1978)
	3. Centralized mass production of services difficult.	Sasser et al. (1978), Upah (1980)
Heterogeneity	1. Standardization and quality control difficult to achieve.	Berry (1980), Booms and Bitner (1981)
Perishability	1. Services cannot be inventoried.	Bateson (1977), Sasser (1976)

Source: Bateson J.E.G. (1989).Managing Services Marketing
The Dryden Press.

Characteristic Cited	Bateson (1977, 1979)	Bell (1981)	Berry (1975, 1980, 1983)	Bessom and Jackson (1975)	Booms & Bitner (1981, 1982)	Carmen & Langeard (1980)	Davidson (1978)	Davis, Guiltinan, and Jones (1979)	Donnelly (1976, 1980)	Eiglier and Langeard (1975, 1976), Eiglier et	Fisk (1981)	George and Barksdale (1974), George (197	Gronroos (1977, 1978, 1979, 1983)
Intangibility	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Heterogeneity (Nonstandardization)		✓	✓	✓		✓	✓			✓			
Inseparability of Production and Consumption	✓		✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Perishability (Cannot Be Inventoried)	✓	✓	✓						✓				

Characteristic Cited	Johnson (1969, 1981)	Judd (1968)	Knisely (1979a, 1979b, 1979c)	Langeard et al. (1981)	Lovelock (1981), Lovelock et al. (1981)	Rathmell (1966, 1974)	Regan (1963)	Sasser (1976), Sasser and Arbeit (197	Schlissel (1977)	Shostack (1977a, 1977b)	Thomas (1978)	Uhl & Upah (1980), Upah (1980), Up	Zeithaml (1981)
Intangibility	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Heterogeneity (Nonstandardization)	✓		✓	✓		✓	✓	✓	✓	✓	✓	✓	✓
Inseparability of Production and Consumption	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Perishability (Cannot Be Inventoried)			✓			✓	✓	✓			✓	✓	

*Several authors have disputed the need for a separate treatment of services in marketing. These authors include Bonoma and Mills (1979), Enis and Roering (1981), and Wyckham, Fitzroy, and Mandry (1975).

Source:Bateson J.E.G.(1989) Managing Services Marketing. The Dryden Press.

Summary of Previously Proposed Schemes for Classifying Services

Author	Proposed Classification Schemes	Comment
Judd (1964)	1. Rented goods services (right to own and use a good for a defined time period) 2. Owned goods services (custom creation, repair or improvement of goods owned by the customer) 3. Nongoods services (personal experiences or "experiential possession")	First two are fairly specific, but third category is very broad and ignores services such as insurance, banking, legal advice and accounting.
Rathmell (1974)	1. Type of seller 2. Type of buyer 3. Buying motives 4. Buying practice 5. Degree of regulation	No specific application to services—could apply equally well to goods.
Shostack (1977)[a] Sasser *et al.*[a] (1978)	Proportion of physical goods and intangible services contained within each product "package"	Offers opportunities for multiattribute modeling. Emphasizes that there are few pure goods or pure services.
Hill (1977)	1. Services affecting persons vs. those affecting goods 2. Permanent vs. temporary effects of the service 3. Reversibility vs. nonreversibility of these effects 4. Physical effects vs. mental effects 5. Individual vs. collective services	Emphasizes nature of service benefits and (in 5), variations in the service delivery/consumption environment.
Thomas (1978)	1. Primary equipment based a. automated (e.g., car wash) b. monitored by unskilled operators (e.g., movie theater) c. operated by skilled personnel (e.g., airline) 2. Primarily people-based a. unskilled labor (e.g., lawn care) b. skilled labor (e.g., repair work) c. professional staff (e.g., lawyers, dentists)	Although operational rather than marketing in orientation, provides a useful way of understanding product attributes.
Chase (1978)	Extent of customer contact required in service delivery a. high contact (e.g., health care, hotels, restaurants) b. low contact (e.g., postal service, wholesaling)	Recognizes that product variability is harder to control in high contact services because customers exert more influence on timing of demand and service features, due to their greater involvement in the service process.
Kotler (1980)	1. People-based vs. equipment-based 2. Extent to which client's presence is necessary 3. Meets personal needs vs. business needs 4. Public vs. private, for-profit vs. nonprofit	Synthesizes previous work, recognizes differences in purpose of service organization.
Lovelock (1980)	1. Basic demand characteristics —object served (persons vs. property) —extent of demand/supply imbalances —discrete vs. continuous relationships between customers and providers	Synthesizes previous classifications and adds several new schemes. Proposes several categories within each classification.

continued

Table 1 (continued)

Author	Proposed Classification Schemes	Comment
	2. Service content and benefits —extent of physical goods content —extent of personal service content —single service vs. bundle of services —timing and duration of benefits 3. Service delivery procedures —multisite vs. single site delivery —allocation of capacity (reservations vs. first come, first served) —independent vs. collective consumption —time defined vs. task defined transactions —extent to which customers must be present during service delivery	Concludes that defining object served is most fundamental classification scheme. Suggests that valuable marketing insights would come from combining two or more classification schemes in a matrix.

[a]These were two independent studies that drew broadly similar conclusions.

Source: Bateson J.E.G.(1989).Managing Services Marketing. The Dryden Press. (iii)

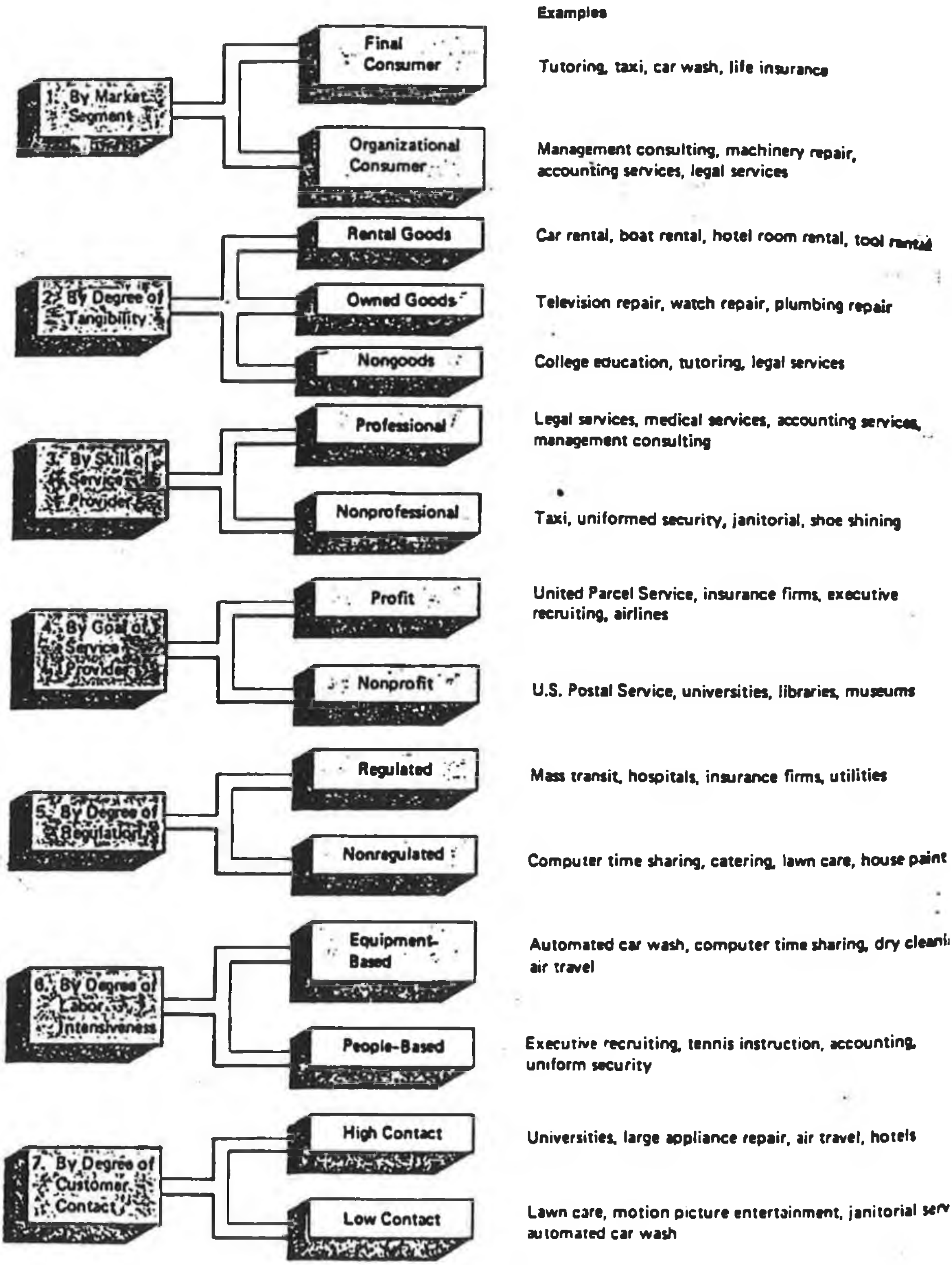

FIGURE 17-1 A Classification System for Services

Source: Evans & Berman.1987.Principles of Marketing Macmillan

(iva)

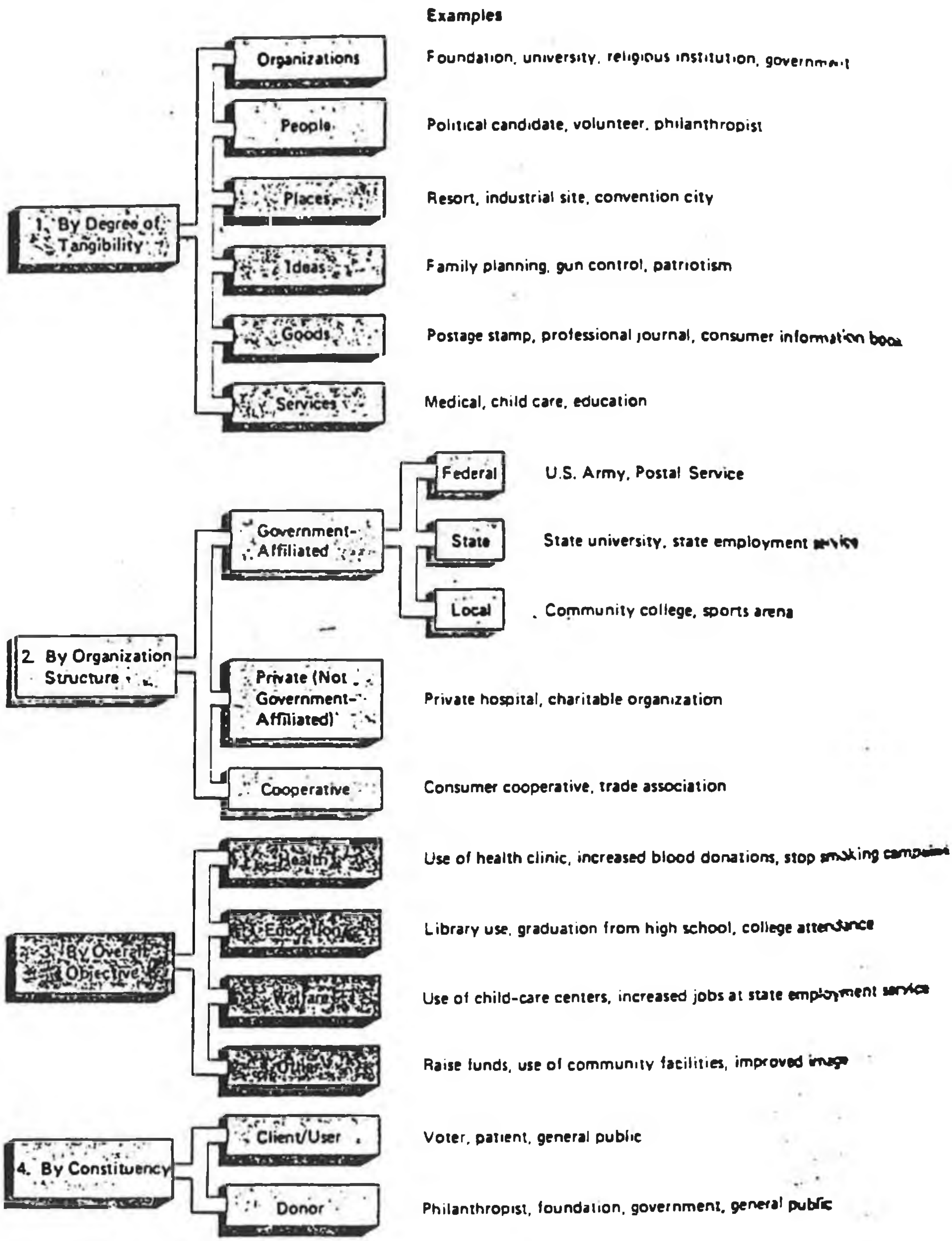

FIGURE 17-5 A Classification System for Nonprofit Marketing

140 Source:Evans & Breman.1987.Principles of Marketing.Macmillan

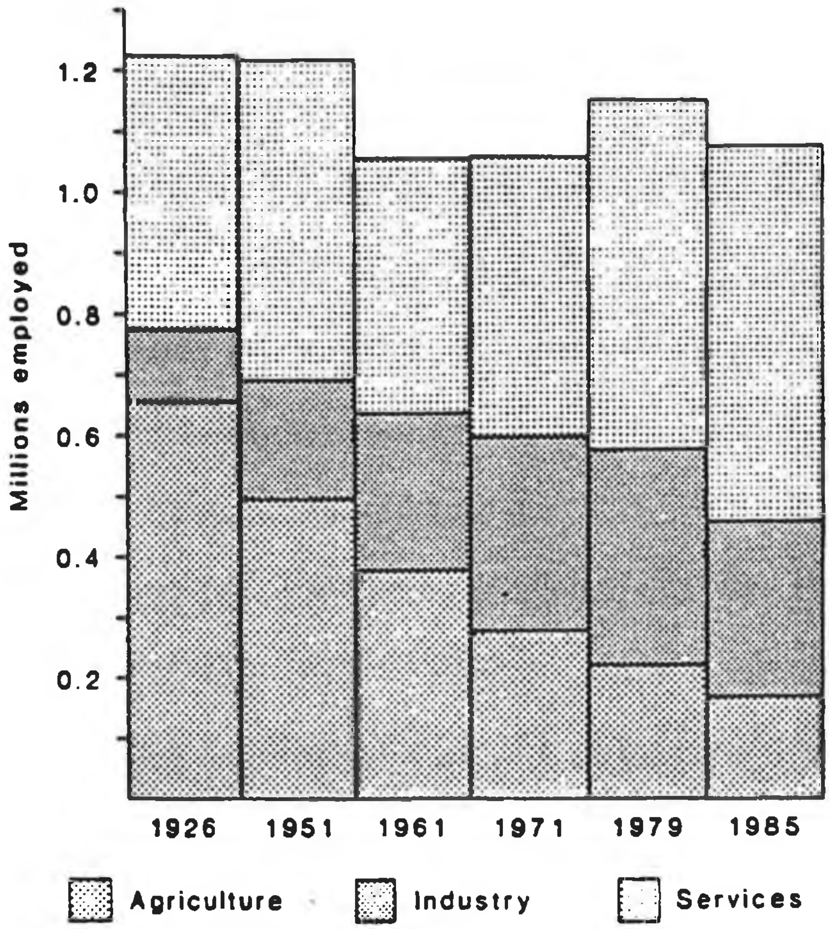

Figure 1.2 Changing structure of the Irish economy, 1926–85.

Source: Brunt·Barry. The Republic of Ireland. Paul Chapman Pub. 1988

Table 1.7 Expenditure of central government by purpose of expenditure and economic category, 1965–84

	IR£ million, current prices				
	1965–66	1970–71	1975	1980	1984
Defence	14.1	22.4	67.1	176.3	262.6
Other central government services	23.3	37.9	126.3	320.9	607.8
Education	39.8	81.3	222.2	553.7	980.3
Health	15.6	42.7	213.6	697.3	1102.4
Social security and welfare	57.6	119.1	389.6	925.4	2133.9
Housing	21.9	37.0	139.1	371.3	626.0
Other community and social services	4.6	8.1	26.7	71.5	142.1
Agriculture, forestry and fishing	60.7	107.4	179.4	330.0	509.1
Mining, manufacturing and construction	15.7	32.0	82.9	261.5	361.0
Transport and communications	25.6	42.4	131.9	345.9	359.3
Other economic services	6.9	15.9	183.8	168.8	302.5
Public debt	38.0	88.6	217.4	1082.9	2367.7
Total expenditure	323.9	634.8	1980.1	5305.6	9754.6

Source: National Income and Expenditure Tables.

Source: Brunt. Barry. The Republic of Ireland. Paul Chapman Pub 1988

Table 1: **Comparative demographic indicators**

	A	B	C	D	E	F	G	H
Rep. of Ireland	3.5	19	1.0	50	56	31	11	72
Northern Ireland	1.5	8	0.7	106	68	26	12	61
GB	55.1	1	0.1	224	76	20	15	54
France	55.4	3	0.4	97	73	22	13	54
Netherlands	14.5	1	0.4	379	88	22	12	52
W.Germany	61.0	-3	-0.2	239	94	17	15	47
Spain	38.5	8	0.6	74	91	26	11	59
Sweden	8.3	-5	0.0	18	83	19	16	54

Columns: A Population size 1986 (Mill.)
B Projected increase 1985-2000 (%)
C Natural increase per 1,000 population p.a. 1982/83.
D Density per sq km
E Urban population (%)
F Age structure 1982/83 - under 15 (%)
G Age structure 1982/83 - over 64 (%)
H Age structure 1982/83 - dependancy ratio (population under 15 plus over 64 per 100 persons aged 15-64 years)

Data Sources: 1985/86 World Population Data Sheets (Population Reference Bureau); Regional Trends (HMSO); Population Projections 1983-2023 (OPCS).
Definitions of 'Urban' vary from country to country.

Source:Brunt.Barry 1988.The Republic of Ireland.Paul Chapman Pub.

Table 2: Population Change in Ireland, 1926-86

Period	Population at end of period (000s)	Population change	Natural increase	Net migration
		Republic of Ireland		
1926-36	2,968	-0.1	5.5	-5.6
1936-46	2,955	-0.4	5.9	-6.3
1946-51	2,961	+0.4	8.6	-8.2
1951-61	2,818	-4.9	9.2	-14.1
1961-66	2,884	+4.6	10.3	-5.7
1966-71	2,978	+6.4	10.1	-3.7
1971-79	3,368	+15.4	11.1	+4.3
1979-81	3,443	+11.1	11.8	-0.7
1981-86	3,537	+5.4	9.7	-4.3
		Northern Ireland		
1926-37	1,280	+1.7	5.8	-4.1
1936-51	1,371	+4.9	8.5	-3.6
1951-61	1,425	+3.9	10.5	-6.6
1961-66	1,485	+8.2	13.4	-5.2
1966-71	1,536	+5.9	10.1	-4.2
1971-81	1,534	-0.1	7.0	-7.1
1981-86	1,547	+2.6	7.2	-4.6

Figures on population change, natural increase and net migration refer to average rates per 1,000 population per annum

Source:Brunt Barry.1988.The Republic of Ireland.Paul Chapmen Pub.

Table 1.4. Employment by economic sector, 1926-84

Year	Percentage distribution			Total
	Primary	Secondary	Tertiary	
1926	53.6	12.8	33.6	1,220,284
1936	49.9	16.1	34.0	1,235,424
1946	47.1	16.6	36.3	1,227,745
1951	41.5	22.1	36.4	1,219,722
1961	36.9	23.5	39.6	1,052,539
1971	26.9	29.6	43.5	1,054,839
1981	17.4	30.8	51.8	1,134,798
1984	16.7	28.7	54.5	1,115,000

Note: The primary sector is taken to include agriculture, forestry, fishing and mining; the secondary sector comprises manufacturing, construction and electricity; other economic activities are allocated to the tertiary sector.

Sources: data derived from *Census of population*, 1926-81; *Building on reality 1985-87* (1984).

Source: Gillmore_D.A. Economic Activities in the Republic of Ireland. A Geographical perspective. Dublin Gill & Macmillan 1985 P 31

Table 1.11 Expenditure of personal income in Ireland, 1953–84

	Percentage of total expenditure				
	1953	1960	1970	1979	1984
Food, beverage and tobacco	52.9	49.9	33.7	34.8	34.0
Food and non-alcoholic beverage	37.3	34.5	26.7	22.6	20.8
Alcoholic beverage	7.8	7.8	10.4	9.2	9.3
Tobacco	7.8	7.6	6.0	3.1	3.9
Clothing and footwear	12.0	9.9	9.5	6.3	4.6
Fuel and power	4.7	4.6	3.8	4.3	4.6
Rent	4.9	5.7	5.8	4.4	5.2
Household equipment and services	9.8	11.0	12.2	6.3	4.5
Durable household goods	4.9	5.5	7.2	4.7	2.9
Transport and communication	6.6	7.8	8.7	11.0	9.4
Recreation, entertainment and education	4.4	5.3	4.8	8.0	6.9
Miscellaneous	3.9	5.3	5.3	7.4	6.1
Tax on personal wealth and income	5.1	5.3	11.1	17.6	25.2
Total	100.0	100.0	100.0	100.0	100.0
Total personal expenditure (IR£ million)	408	525	1,294	6,275	12,379

Source: National Income and Expenditure Tables.

Source:Brunt Barry.1988.The Republic of Ireland Paul Chapmen Pub.

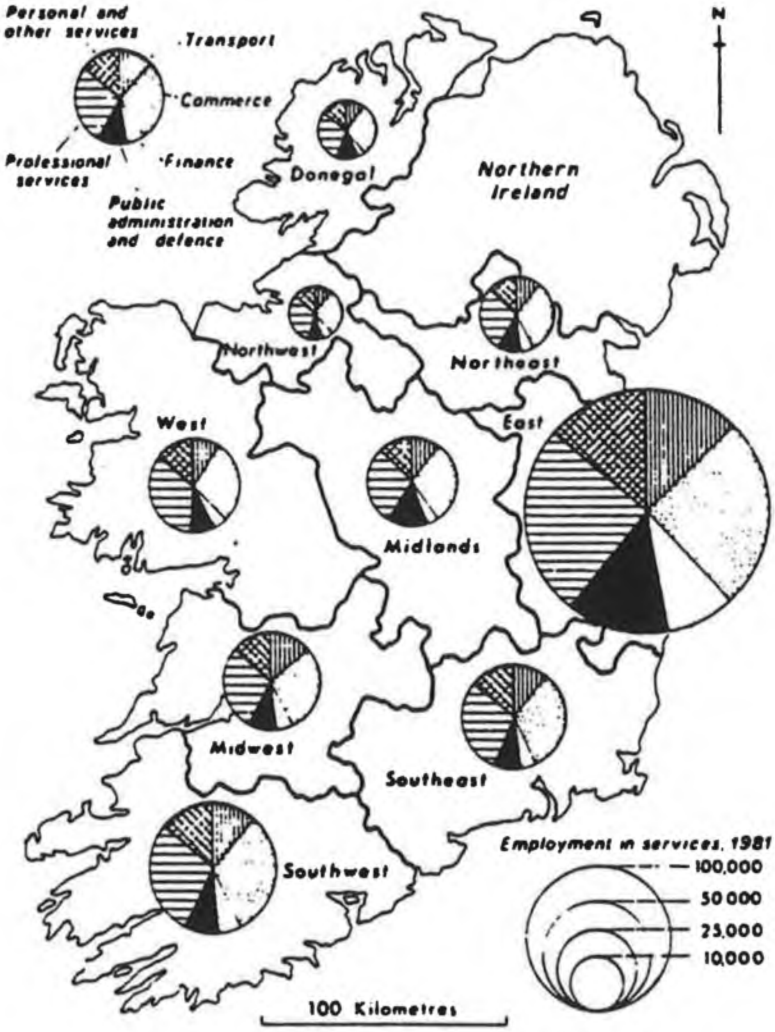

Figure 7.1. Structure of regional tertiary employment

Source:Gillmor D.A. 1985.Economic Activities in the Republic of Ireland.A Geographic Perspective. Dublin.Gill & Macmillan.p263

Table 3

Employment by Detailed Service Sub-Sector, Ireland 1961 - 1981

	1961	1971	1981
Distributive Services	161,651	165,446	184,574
1. Transportation	37,827	40,357	41,654
2. Communications	6,250	9,185	16,104
3. Wholesale	53,777	36,856	49,028
4. Retail	83,797	79,048	77,788
Producer Services	25,457	37,306	66,525
5. Banking	7,551	11,466	22,293
6. Insurance	6,688	8,020	11,588
7. Real Estate	1,477	2,010	2,822
8. Engineering	1,426	2,827	5,385
9. Accounting	2,019	3,086	7,608
10. Misc. Business Services	2,173	5,456	9,687
11. Legal Services	4,123	4,441	7,142

Table 3 (cont.)

Employment by Detailed Service Sub-Sector, Ireland 1961 - 1981

	1961	1971	1981
Social Services	119,263	147,561	208,026
12. Medical health	7,056	7,812	10,027
13. Hospitals	24,128	32,791	54,779
14. Education	29,584	39,424	57,861
15. Welfare Religious	16,454	15,836	12,783
16. Non-Profit Organisations	-	-	-
17. Postal Services	10,090	10,580	11,528
18. Government	31,951	41,118	61,056
19. Misc. Social	-	-	-
Personal Services	96,633	95,743	100,261
20. Domestic	32,096	15,721	6,082
21. Hotels	11,569	15,622	14,209
22. Eating, Drinking	16,184	19,837	27,771
23. Repair Services	13,373	20,345	24,459
24. Laundry, Cleaning	5,139	4,395	2,808
25. Barber, Beauty Shop	4,075	5,359	6,756
26. Entertainment	10,986	10,851	11,301
27. Misc. Personnel	2,411	3,613	6,875
TOTAL SERVICES	405,543	449,428	569,250

Table 7.1. Retail distribution by province and city

Area	Population (1979)	Establish-ments	Turnover (£M)	Employ-ment
State	3,368,217 100%	32,332 100%	2,389 100%	126,286 100%
Leinster	1,743,861 51.8%	13,424 41.5%	1,331 55.7%	63,479 50.3%
Munster	979,819 29.1%	11,420 35.3%	688 28.8%	39,721 31.5%
Connacht	418,500 12.4%	4,977 14.8%	243 10.2%	15,339 12.1%
Ulster	226,037 6.7%	2,689 8.3%	126 5.3%	7,747 6.1%
Dublin and suburbs	900,884 26.2%	5,639 17.4%	797 33.3%	35,243 27.9%
Cork, Limerick, Galway, Waterford	303,834 8.8%	3,004 9.3%	344 14.4%	16,159 12.8%

Source: derived from data in *Census of distribution 1977; Census of population 1979*

Source: Gillmor D.A. 1985. Economic Activities in the Republic of Ireland. A Geographical Perspective. Dublin Gill & Macmillan p272

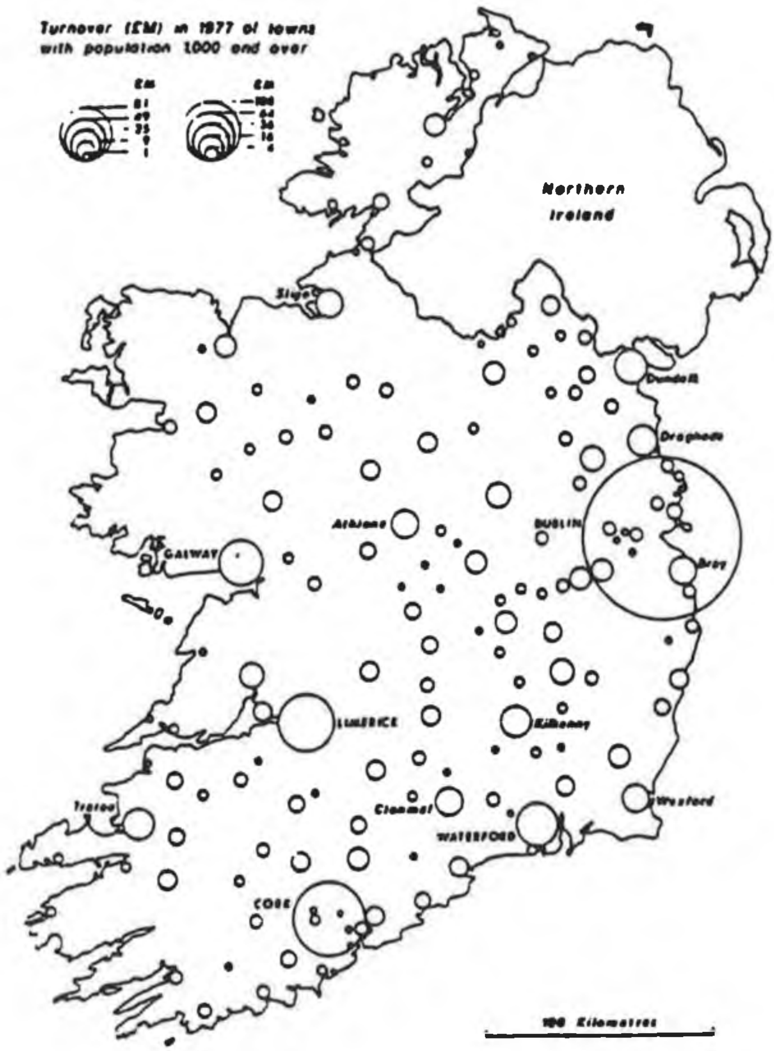

Figure 7.2. Retail trade

Source:Gillmor D.A.1985.Economic Activities in the Republic of Ireland.A Geographical Perspective Dublin.Gill & Macmillan.p275

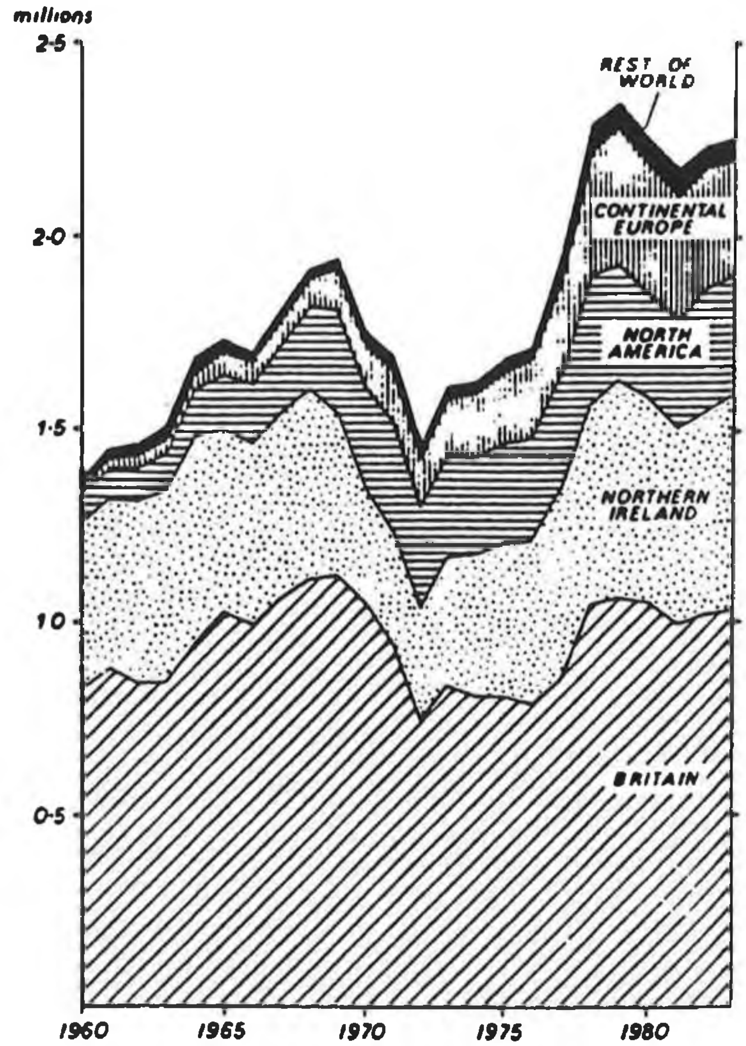

Figure 8.1. Trend in visitor numbers, 1960-1983

Source:Gillmor.D.A.1985 Economic Activities in the Republic of Ireland.A Geographic Perspective.Dublin.Gill & Macmillan.p304

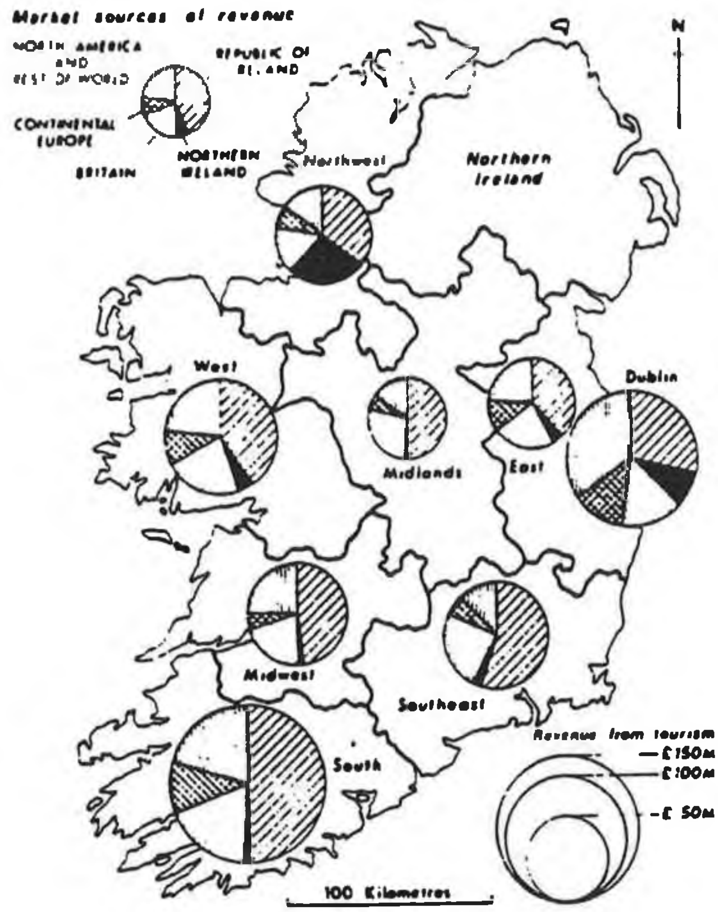

Figure 8.2. Market structure of regional tourism incomes

Source:Gillmor.D.A.1985 Economic Activities in the Republic of Ireland.A Geographic Perspective.Dublin.Gill & Macmillan.p313

Appendix

Transport. Persons employed (000's)

Form	1956	1966	1971
Total	34.9	35.3	36.0
Rail	14.5	9.9	10.0
Road	12.0	12.8	14.0
Air	2.0	5.5	6.4
Sea	6.4	7.1	5.7

Source:Compiled from Census of Population and Company Annual Reports. From Cogan D.J.(1978).The Irish Services Sector:A study of Productive Efficiency. The Stationery Office. Dublin.

Comparison of Societies

Society	Game	Predominant Activity	Use of human Labour	Unit of Social Life	Standard of Living Measure	Structure
Preindustrial	Against Nature	Agriculture Mining	Raw Muscle Power	Extended Household	Subsistence	Routine, Traditional, Authoritative
Industrial	Against fabricated nature	Goods Production	Machine Tending	Individual	Quantitiy of Goods	Beaurocratic Hierarchical
Post-industrial	Among persons	Services	Artistic Creative intellectual	Community	Quality of life in terms of health, education & recreation	Interdependent global

Source: Daniel Bell.The Coming of Post-Industrial Society: A Venture for Social Social Forecasting.Basic Books Inc. New York 1973.

PRODUCT ANALYSIS OF PURSUED COMPLAINTS YEAR ENDED 30th JUNE

PRODUCT	1989	1990	1991
Clothing/Footwear	2	7	7
Financial/Insurance/Investment	10	18	10
Cars/Motoring/Accessories	1	13	2
Travel/Holidays	9	9	35
Cosmetics/Toiletries	1	1	3
Business Supplies & Services	4	5	12
Health & Medicinal	7	6	3
Alcohol	9	1	8
Domestic Appliances & Services	28	23	16
TV/Audio/Video/Accessories	6	2	11
Books/Publications/Media	11	5	6
Furniture/Fabrics	–	4	2
Employment Offers/Recruitment/Homeworkers	2	6	4
Food/Confectionery/Beverage	5	3	11
Entertainment	8	1	4
Property/Accommodation	2	–	7
Miscellaneous	–	6	7
TOTAL	105	110	148

Source: Advertising Standards Authority 10th Annual Report 1990/91.

ASAI investigates complaints concerning the content of commercial advertisements i.e. paid-for communications designed to influence the opinion or behaviour of those to whom they are addressed. When a complaint is received, it is evaluated initially to determine whether it is within the terms of reference of ASAI and if a prima facie case exists. In such case, the advertiser or his agency is informed of the complaint and invited to comment. In the light of the comments received a draft recommendation to the Complaints Committee is prepared by the Secretariat and both the complainant and the advertiser/agency are given an opportunity to express their further views in the matter at that stage. The case is then considered by the Complaints Committee which decides whether or not the complaint is upheld.

Where a complaint falls outside the terms of reference of the Authority (e.g. because it does not relate to advertisement content) or where a prima facie case is not apparent, the complaint is not pursued. Where a complaint is not pursued, the reasons are explained to the complainant.

BREAKDOWN OF COMPLAINTS DEALT WITH IN THE PERIOD MAY 1981 – JUNE 1991

Year	Written	From Members of the Public	Intra-Industry	Pursued	Not Pursued	Upheld	% of Pursued Complaints Upheld
1981/82	24	13	11	24	0	6	25%
1982/83	481	440	41	104	377	20	19%
1983/84	252	223	29	51	201	41	80%
1984/85	303	274	29	54	249	29	54%
1985/86	202	178	24	38	164	26	68%
1986/87	185	146	39	58	127	36	62%
1987/88	256	211	45	88	168	53	60%
1988/89	252	205	47	105	147	61	58%
1989/90	288	249	39	110	178	68	62%
1990/91	312	269	43	148	164	107	72%
TOTAL	2555	2208	347	780	1775	447	57%

TABLE 1 - REGIONAL INDICATORS

REGION	Total Pop. 1986 (000s)	Percentage in towns >10,000 %	Percentage at Work Engaged in Agri-culture	Indus-try	Ser-vices	Total Unemployed 1988 (000s)
EAST	1336.1	76.4	3.5	26.2	70.2	90.1
SOUTH-WEST	536.9	37.6	20.6	27.8	51.6	31.1
SOUTH-EAST	385.0	26.6	23.3	29.6	47.1	25.3
NORTH-EAST	198.2	27.6	20.0	32.5	47.4	14.3
MID-WEST	315.4	29.2	22.3	26.8	50.9	16.2
MIDLANDS	262.6	10.8	23.8	29.7	46.5	12.8
WEST	293.7	16.0	28.4	24.2	47.4	12.8
NORTH-WEST *	212.7	8.5	20.7	30.0	49.3	15.9
STATE	3540.6	44.2	15.2	27.5	57.3	218.6

* NORTH-WEST includes County Donegal

Data Source: **Census 86 Volume 1, CSO, 1988, Dublin**
Labour Force Survey, 1988, CSO, Dublin

The following table, from a Bord Fáilte Survey of Travellers in 1985, illustrates the extent to which leisure pursuits have become an integral part of the modern holiday.

Table 4.a Leisure Pursuits of US Tourists while on holiday in Republic of Ireland, 1985

Proportion of Holidaymakers %	Engaged in Specified Pursuits
95	• at least one pursuit
80	• historic sites
60	• car touring
45	• hotel cabarets, pubs
35	• traditional music • stately homes
30	• national parks • museums
20	• banquets • art galleries
10	• theatre
5 or less	• walking • golf • festivals

Some holiday destination countries have recognised these changes and their perceptions of what constitutes tourism have altered accordingly. The English Tourist Board, for example, encourages the provision of leisure facilities which would be considered as on the periphery of tourism in the Republic.

<u>Tourism, Travel and Leisure - a Broader Definition of Industry</u>

Tourism is like any other product exchanged for money in the market place. The consumer sees it as including everything that takes place during the period away from home and ending with the return. This will include access transport, frontier formalities, accommodation, dining facilities, entertainment, leisure activities, shopping, etc.

This broader concept of the tourism, travel and leisure industry would include:

- day trips by domestic residents ... which, according to the English Tourist Board, are placing growing demands on tourism and leisure services, and

- the supporting infrastructure of roads, telecommunications, etc.

Based on this broader concept, we have categorised in the following table organisations and companies in the Republic which provide services to visitors. The inclusion of Irish-based tour operators and travel agents deserves mention. The rise in the numbers of Irish travelling abroad is often regarded as a loss to Irish tourism. So it is. But a proportion of spending is earned by companies in the Republic. The scheduled airlines, sea ferries, travel agents and tour operators all benefit, and this supports a range of jobs.

Table 4.b Sectoral Categorisation of Tourism, Travel and Leisure Industry.

Sector	Constituents
1. State Organisations	Government Departments, Bord Failte, Regional Tourism, Organisations, CERT, SFADCO, Udaras na Gaeltachta, Local Government.
2. Access Transport	Airlines, Sea Carriers.
3. Internal Transport	Car Rental, Coaches,Caravan Hire, Rail and Bus Services, Internal Air and Boat Services, Taxis.
4. Accommodation	Hotels, Guesthouses, Town Houses, Country Homes, Farmhouses, Camping and Caravanning, Self-Catering Accommodation, Youth Hostels.
5. Tourism Facilitation	Customs and Immigration, Aer Rianta, Docks and Harbour Boards.
6. Dining and Entertainment Facilities	Restaurants, Pubs, Cabarets, Theatres, Cinemas, Festivals, TV and Radio.
7. Leisure/Recreation/ Activity Facilities	Cabin Cruising, Horse-drawn Caravans, Golfing, Fishing, Historic Houses, National Parks, Shopping.
8. Tourism Services	In-coming Tour Operators, Tour Operators and Travel Agents, Youth/Student Organisers.
9. Other Services	Banks, Bureaux de Change, Local Tourism Companies and Co-Operatives.

Based on an update of a study completed by Bord Fáilte in 1984, this Table details the total employment generated by export and domestic tourism spending in 1985.

Table 5.a Employment Impact of Tourism (1985 man years)

Category of Tourism Expenditure	Number of Jobs (man years)				
	Expend £M	Direct Impact	Indirect Impact	Induced Impact	Govt. treated as fully reacting Sector
Export	518	20,000	6,000	5,000	34,000
Access Transport	173	5,000	1,000	2,000	6,000
Domestic	269	8,750*	2,800	-	-
TOTAL	960	33,750	9.800	7,000	40,000

* represents the 'net' number of 'job equivalents' dependent on tourism i.e. the 'net' loss of jobs in the economy if domestic tourism were to cease.

The findings indicate that in 1985 direct employment in tourism was about 34,000 man years. The indirect effects account for almost a further 10,000 man years, and the induced effects for an additional 7,000. If Government tax receipts from tourism expenditure are treated as being respent and the Government sector is treated as fully reacting with all other sectors (assuming a balanced budget), then a further 40,000 man years may be attributed to tourism. In total, export and domestic tourism accounted for some 91,000 man years or 'job equivalents' in 1985. Of these, about 34,000 job equivalents were directly dependent on tourism.

4.3 Direct Employment in Tourism, Travel and Leisure

These 91,000 jobs are not all, however, in a recognisable tourism industry, and it is important to distinguish between 'jobs dependent on tourism' and 'jobs in tourism.' The numbers employed in what might be called the tourism industry are much lower. There are no areas which are completely 'in tourism'.

Tourism is about people spending money away from where they live and work. It includes travel for most purposes, but not local and neighbourhood activities or travel to and from work. The tourism industry is made up of attractions, facilities and services for tourists, but only as far as they serve tourists rather than local or other markets.

Table 5.b Structure of Employment in the Tourism Industry

CATEGORY	NUMBER OF ESTABLISHMENTS	NUMBERS EMPLOYED (a) PERMANENT F/T	PERMANENT P/T	SEASONAL F/T	SEASONAL P/T	TOTAL	TOTAL 'JOB EQUIVALENTS'	PROPORTION DIRECTLY RELATED TO TOURISM %	'JOB EQUIVALENTS' DIRECTLY RELATED TO TOURISM
ACCOMMODATION	4,838	13,595	2,085	10,675	8,080	34,750 (b)	19.920	80	15,910
CATERING	11,334	34,670	13,970	2,220	1,090	51,950	38,100	8	4,740
	16,172	48,265	16,055	12,895	9,170	86,700	58,020	36	20,650
ACCESS TRANSPORT	34	7,100	200	600	600	8,500	7,520	60	4,500
INTERNAL TRANSPORT	NA	20,495	4,855	510	35	33,435 (b)	27,080	6	1,755
TRAVEL SERVICES	309	2,820	66	180	134	3,200	2,920	4	115
TRAVEL FACILITATION	9	2,720	NA	NA	NA	2,720 (c)	2,720 (c)	70	1,900
	412 (c)	33,135	5,120	1,290	770	47,855	40,240	21	8,270
LEISURE/ RECREATION	852 (d)	11,148	555	701	1,644	14,510 (b)	12,083	57	6,915
	852	11,148	555	701	1,644	14,510	12,083	57 (e)	6,915
SECTOR SUPPORT SERVICES	NA	NA	NA	NA	NA	350 (b)	85	100	85
STATE ORGANISATIONS	129	2,505	NA	245	NA	2,750	2,580	100	2,580
	129	2,505	NA	245	NA	3,100	2,665	100	2,665
TOTAL	17,565	95,053	21,730	15,131	11,584	152,169 (b)	113,008	34	38,500

NOTES:
(a) Partial information available
(b) Includes those employed who cannot be identified specifically by job status
(c) Excludes taxis and private coaches
(d) Only establishments related to tourism included
(e) Excluding cinema and television/radio and shopping.

NA: Not Available

Table 5.c Structure of Employment in Accommodation and Catering

CATEGORY	NO. OF ESTABLISHMENTS	NUMBERS EMPLOYED Permanent F/T	NUMBERS EMPLOYED Permanent P/T	NUMBERS EMPLOYED Seasonal F/T	NUMBERS EMPLOYED Seasonal P/T	TOTAL	TOTAL 'JOB EQUIVALENTS'	PROPORTION DIRECTLY RELATED TO TOURISM %	TOURISM RELATED EMPLOYMENT 'JOB EQUIV-ALENTS'
ACCOMMODATION									
1. Hotels	650	11,500	1,380	7,360	2,760	23,000	15,190	75	11,400
2. Guesthouses	179	565	210	210	265	1,250	800	70	560
3. Farmhouses, Town & Country homes	2,194	1,210	440	1,930	1,920	5,500	2,450	100	2,450
4. +Caravan & Camping	110	120	5	325	235	700	280	100	300
5. Youth Hostels	105	NA	NA	NA	NA	300	100	100	100
6. Self-Catering	1,600	200	50	850	2,900	4,000	1,100	100	1,100
SUB TOTAL	4,838	13,595	2,085	10,675	8,080	34,750	19,920	80	15,910
CATERING									
1. Restaurants	1,584	11,670	2,970	2,220	1,090	17,950	14,100	20	2,820
2. Pubs*, night clubs*	9,750	23,000	11,000	NA	NA	34,000	24,000 c	8	1,920
SUB TOTAL	11,334	34,670	13,970	2,220	1,090	51,950	38,100	12	4,740

Notes: * excluding hotels
+ registered sides
c estimate of number of jobs involved
NA Not Available

Table 5.d Structure of Employment in Transport and Travel

CATEGORY	NO. OF ESTABLISHMENTS	NUMBERS EMPLOYED				TOTAL	TOTAL 'JOB' EQUIVALENTS'	PROPORTION DIRECTLY RELATED TO TOURISM	TOURISM RE-LATED EMP-LOYMENT 'JOB EQUIVALENTS'
		PERMANENT		SEASONAL					
		F/T	P/T	F/T	P/T				
ACCESS TRANSPORT									
1. Air Carriers	30	5,000	NA	500	NA	5,500	5,170	60	3,100
2. Sea Carriers	4	2,100	200	100	600	3,000	2,350	60	1,400
SUB TOTAL	34	7,100	200	600	600	8,500	7,520	60	4,500
INTERNAL TRANSPORT									
1. Car Rental	26	580	15	110	20	725	630	85	535
2. Taxis	NA	NA	NA	NA	NA	7,500	4,000	10	395
3. Coach Touring	NA	6,000	4,000	NA	NA	10,000	8,000	4	320
4. Air/Sea Service	16	115	40	40	15	210	150	55	80
5. Bus & Rail	1	13,800	800	400	NA	15,000	14,300	3	425
SUB TOTAL	NA	20,495	4,855	510	35	33,435	27,080	6	1,755
TRAVEL SERVICES									
1. Incoming Tour Operators	29	120	6	30	44	200	140	80	115
2. Travel Agents	280	2,700	60	150	90	3,000	2,780	-	-
SUB TOTAL	309	2,820	66	180	134	3,200	2,820	4	115
TRAVEL FACILITATION									
1. Airports	5	1,720	NA	NA	NA	(c)1,720	(c)1,720	60	1,000
2. Sea Ports	4	1,000	NA	NA	NA	(c)1,000	(c)1,000	60	600
3. Immigration, Customs	-	NA	NA	NA	NA	NA	NA	NA	(c)300
SUB TOTAL		2,720	NA	NA	NA	(c)2,720	(C)2,720	70	1,900

Table 5.e Structure of Employment in Leisure/Recreation and Other Support Services

SECTOR	NO. OF ESTABLISHMENTS	NUMBERS EMPLOYED PERMANENT F/T	NUMBERS EMPLOYED PERMANENT P/T	NUMBERS EMPLOYED SEASONAL F/T	NUMBERS EMPLOYED SEASONAL P/T	TOTAL	TOTAL 'JOB EQUIVALENTS'	PROPORTION DIRECTLY RELATED TO TOURISM	TOURISM RELATED EMPLOYMENT 'JOB EQUIVALENTS'
LEISURE/RECREATION									
1. Cabin Cruising	11	80	24	12	124	240	115	100	125
2. Pleasure Cruises	6	3	-	8	19	30	10	100	10
3. Sailing, canoeing	36	50	38	70	72	230	110	55	60
4. Horse-drawn caravans	3	-	-	16	4	20	6	100	6
5. Horse riding	77	145	80	50	85	360	220	25	55
6. Golfing	191	1,900	NA	NA	NA	2,360	c)2,000	25	c)500
7. Angling	NA	430	150	100	120	800	564	20	110
8. Historic Houses, Gardens	40	80	40	15	85	220*	120	55	70
9. Nature Parks, etc	-	-	-	-	-	*	-	-	-
10. English Language Schools	29	135	40	175	810	1,160	370	90	340
11. Other schools, camps	55	95	33	165	75	370	182	70	130
12. Museums	150	505	35	55	105	700	563	45	255
13. Art Galleries	60	200	60	20	20	300	240	10	25
14. Genealogy	15	200	NA	NA	NA	220	220	30	65
15. Irish crafts	18	500	NA	NA	NA	500	500	40	200
16. Racing (Tracks)	26	3,000	NA	NA	NA	3,000	3,000	10	300 c)
17. General Shopping Retail	NA	NA	NA	NA	NA	NA	NA	NA	4,500 c)
18. Sports Clubs	NA	NA	NA	NA	NA	NA	NA	NA	NA
19. Theatre	25	305	55	15	125	500	363	25	90
20. Festivals, events	NA	NA	NA	NA	NA	NA	NA	NA	NA
21. Cinema, T.V.	110	3,500	NA	NA	NA	3,500	3,500	NA	NA
SUB TOTAL	852	11,148	555	701	1,644	14,510	12,083	20	6,915

Notes: NA not available; c) estimate of number of jobs involved; * excluding those counted under other sectors.

Table 5.f Structure of Employment in 'Other Support Services'

SECTOR	NO. OF ESTABLISHMENTS	NUMBERS EMPLOYED				TOTAL	TOTAL 'JOB EQUIVALENTS'	PROPORTION DIRECTLY RELATED TO TOURISM	TOURISM RELATED EMPLOYMENT 'JOB EQUIVALENTS'
		Permanent		Seasonal					
		F/T	P/T	F/T	P/T				
SECTOR SUPPORT SERVICES									
1. Bureaux de Change	NA	NA	NA	NA	NA	350	60	100	60
2. Local Tourism	NA	NA	NA	NA	NA	NA	25	100	25
SUB TOTAL	NA	NA	NA	NA	NA	350	85	100	85
STATE ORGAN-ISATIONS									
1. Government Departments & Agencies	23	2,505	NA	245	NA	2,750	2,580	100	2,580
2. Local Authorities	117	NA	NA	NA	NA	NA	NA	NA	NA
SUB TOTAL	129	2,505	NA	245	NA	2,750	2,580	100	2,580

Notes: NA not available; c estimate of number of jobs involved; * excluding those counted under other sectors

TABLE 5
ESTIMATED NUMBER OF OUTLETS AND PERSONS ENGAGED IN 5 SERVICE BUSINESSES CLASSIFIED BY NUMBER OF PERSONS ENGAGED FOR THE STATE AND THE DUBLIN REGION

REGIONAL LOCATION, DESCRIPTION OF BUSINESS AND NUMBER OF PERSONS ENGAGED	NUMBER OF OUTLETS	NUMBER OF PROPRIETORS AND FAMILY WORKERS	NUMBER OF EMPLOYEES			NUMBER OF PERSONS ENGAGED
			FULL-TIME	PART-TIME	TOTAL	
STATE						
HOTELS AND CATERING						
1 PERSON ENGAGED	430	327	97	6	103	430
2 PERSONS ENGAGED	746	1,084	298	110	408	1,492
3 PERSONS ENGAGED	616	939	628	281	909	1,848
4 PERSONS ENGAGED	474	740	759	397	1,156	1,896
5 - 9 PERSONS ENGAGED	1,009	1,331	3,721	1,578	5,299	6,630
10 - 14 PERSONS ENGAGED	324	328	2,407	982	3,389	3,717
15 - 19 PERSONS ENGAGED	129	55	1,472	632	2,104	2,159
20 - 49 PERSONS ENGAGED	217	84	4,307	1,958	6,265	6,349
50 OR MORE PERSONS ENGAGED	102	9	6,386	2,572	8,958	8,967
TOTAL	4,047	4,897	20,075	8,516	28,591	33,488
PERSONAL SERVICES (INCL. REPAIRS)						
1 PERSON ENGAGED	1,585	1,424	148	13	161	1,585
2 PERSONS ENGAGED	1,075	1,182	723	245	968	2,150
3 PERSONS ENGAGED	629	706	935	246	1,181	1,887
4 PERSONS ENGAGED	322	375	774	139	913	1,288
5 - 9 PERSONS ENGAGED	412	366	1,829	318	2,147	2,513
10 - 14 PERSONS ENGAGED	88	45	872	96	968	1,013
15 - 19 PERSONS ENGAGED	27	2	419	25	444	446
20 - 49 PERSONS ENGAGED	34	6	867	44	911	917
50 OR MORE PERSONS ENGAGED	7	0	698	19	717	717
TOTAL	4,179	4,106	7,265	1,145	8,410	12,516
RECREATIONAL SERVICES						
1 PERSON ENGAGED	584	242	214	128	342	584
2 PERSONS ENGAGED	599	326	657	215	872	1,198
3 PERSONS ENGAGED	398	261	684	249	933	1,194
4 PERSONS ENGAGED	266	123	692	249	941	1,064
5 - 9 PERSONS ENGAGED	401	231	1,540	712	2,252	2,483
10 - 14 PERSONS ENGAGED	83	14	665	299	964	978
15 - 19 PERSONS ENGAGED	45	13	411	318	729	742
20 - 49 PERSONS ENGAGED	56	10	1,077	546	1,623	1,633
50 OR MORE PERSONS ENGAGED	13	10	1,001	283	1,284	1,294
TOTAL	2,445	1,230	6,941	2,999	9,940	11,170
REAL ESTATE, RENTING & BUSINESS SERVICES						
1 PERSON ENGAGED	2,211	1,588	557	66	623	2,211
2 PERSONS ENGAGED	2,077	1,722	2,041	391	2,432	4,154
3 PERSONS ENGAGED	1,219	1,056	2,186	415	2,601	3,657
4 PERSONS ENGAGED	899	884	2,321	391	2,712	3,596
5 - 9 PERSONS ENGAGED	1,641	1,709	7,761	1,061	8,822	10,531
10 - 14 PERSONS ENGAGED	446	568	4,183	454	4,637	5,205
15 - 19 PERSONS ENGAGED	209	278	2,914	311	3,225	3,503
20 - 49 PERSONS ENGAGED	269	355	6,335	1,134	7,469	7,824
50 OR MORE PERSONS ENGAGED	116	321	8,731	7,091	15,822	16,143
TOTAL	9,087	8,481	37,029	11,314	48,343	56,824
STORAGE, TRANSPORT, COMMUNICATION & MISC. SERVICES (PRIVATE SECTOR)						
1 PERSON ENGAGED	1,082	934	123	25	148	1,082
2 PERSONS ENGAGED	605	499	622	89	711	1,210
3 PERSONS ENGAGED	352	274	692	90	782	1,056
4 PERSONS ENGAGED	272	156	852	80	932	1,088
5 - 9 PERSONS ENGAGED	549	285	2,976	278	3,254	3,539
10 - 14 PERSONS ENGAGED	174	70	1,749	181	1,930	2,000
15 - 19 PERSONS ENGAGED	73	37	1,079	100	1,179	1,216
20 - 49 PERSONS ENGAGED	109	14	2,915	186	3,101	3,115
50 OR MORE PERSONS ENGAGED	36	0	2,905	219	3,124	3,124
TOTAL	3,252	2,269	13,913	1,248	15,161	17,430
ALL SERVICES LISTED ABOVE						
1 PERSON ENGAGED	5,892	4,515	1,139	238	1,377	5,892
2 PERSONS ENGAGED	5,102	4,813	4,341	1,050	5,391	10,204
3 PERSONS ENGAGED	3,214	3,236	5,125	1,281	6,406	9,642
4 PERSONS ENGAGED	2,233	2,278	5,398	1,256	6,654	8,932
5 - 9 PERSONS ENGAGED	4,012	3,922	17,827	3,947	21,774	25,696
10 - 14 PERSONS ENGAGED	1,115	1,025	9,876	2,012	11,888	12,913
15 - 19 PERSONS ENGAGED	483	385	6,295	1,386	7,681	8,066
20 - 49 PERSONS ENGAGED	685	469	15,501	3,868	19,369	19,838
50 OR MORE PERSONS ENGAGED	274	340	19,721	10,184	29,905	30,245
TOTAL	23,010	20,983	85,223	25,222	110,445	131,428

Source:Central Statistics Office

TABLE 5(CONTD)
ESTIMATED NUMBER OF OUTLETS AND PERSONS ENGAGED IN 5 SERVICE BUSINESSES CLASSIFIED BY NUMBER OF PERSONS ENGAGED FOR THE STATE AND THE DUBLIN REGION

REGIONAL LOCATION, DESCRIPTION OF BUSINESS AND NUMBER OF PERSONS ENGAGED	NUMBER OF OUTLETS	NUMBER OF PROPRIETORS AND FAMILY WORKERS	NUMBER OF EMPLOYEES			NUMBER OF PERSONS ENGAGED
			FULL-TIME	PART-TIME	TOTAL	
DUBLIN METROPOLITAN REGION (INCLUDING SUBURBS)						
HOTELS AND CATERING						
1 PERSON ENGAGED	49	38	11	0	11	49
2 PERSONS ENGAGED	173	248	82	16	98	346
3 PERSONS ENGAGED	183	280	205	64	269	549
4 PERSONS ENGAGED	120	131	252	97	349	480
5 - 9 PERSONS ENGAGED	283	221	1,280	364	1,644	1,865
10 - 14 PERSONS ENGAGED	102	53	860	207	1,067	1,120
15 - 19 PERSONS ENGAGED	40	6	483	183	666	672
20 - 49 PERSONS ENGAGED	54	9	1,077	566	1,643	1,652
50 OR MORE PERSONS ENGAGED	37	2	2,871	1,155	4,026	4,028
TOTAL	1,041	988	7,121	2,652	9,773	10,761
PERSONAL SERVICES (INCL. REPAIRS)						
1 PERSON ENGAGED	370	299	67	4	71	370
2 PERSONS ENGAGED	285	276	233	61	294	570
3 PERSONS ENGAGED	201	203	308	92	400	603
4 PERSONS ENGAGED	114	117	293	46	339	456
5 - 9 PERSONS ENGAGED	166	122	789	124	913	1,035
10 - 14 PERSONS ENGAGED	38	15	369	52	421	436
15 - 19 PERSONS ENGAGED	17	1	262	19	281	282
20 - 49 PERSONS ENGAGED	24	1	632	30	662	663
50 OR MORE PERSONS ENGAGED	3	0	310	6	316	316
TOTAL	1,218	1,034	3,263	434	3,697	4,731
RECREATIONAL SERVICES						
1 PERSON ENGAGED	139	66	59	14	73	139
2 PERSONS ENGAGED	161	73	216	33	249	322
3 PERSONS ENGAGED	145	70	288	77	365	435
4 PERSONS ENGAGED	90	24	281	55	336	360
5 - 9 PERSONS ENGAGED	152	51	657	222	879	930
10 - 14 PERSONS ENGAGED	27	1	237	81	318	319
15 - 19 PERSONS ENGAGED	11	0	121	62	183	183
20 - 49 PERSONS ENGAGED	26	0	541	222	763	763
50 OR MORE PERSONS ENGAGED	9	3	782	199	981	984
TOTAL	760	288	3,182	965	4,147	4,435
REAL ESTATE, RENTING & BUSINESS SERVICES						
1 PERSON ENGAGED	1,024	774	233	17	250	1,024
2 PERSONS ENGAGED	878	678	895	183	1,078	1,756
3 PERSONS ENGAGED	512	388	972	176	1,148	1,536
4 PERSONS ENGAGED	396	350	1,058	176	1,234	1,584
5 - 9 PERSONS ENGAGED	751	675	3,666	470	4,136	4,811
10 - 14 PERSONS ENGAGED	228	258	2,200	220	2,420	2,678
15 - 19 PERSONS ENGAGED	117	142	1,658	169	1,827	1,969
20 - 49 PERSONS ENGAGED	168	228	4,251	449	4,700	4,928
50 OR MORE PERSONS ENGAGED	84	289	6,871	5,666	12,537	12,826
TOTAL	4,158	3,782	21,804	7,526	29,330	33,112
STORAGE, TRANSPORT, COMMUNICATION & MISC. SERVICES (PRIVATE SECTOR)						
1 PERSON ENGAGED	243	184	47	12	59	243
2 PERSONS ENGAGED	170	95	221	24	245	340
3 PERSONS ENGAGED	97	27	242	22	264	291
4 PERSONS ENGAGED	88	20	306	26	332	352
5 - 9 PERSONS ENGAGED	218	28	1,305	108	1,413	1,441
10 - 14 PERSONS ENGAGED	78	2	843	54	897	899
15 - 19 PERSONS ENGAGED	30	19	462	31	493	512
20 - 49 PERSONS ENGAGED	61	0	1,660	89	1,749	1,749
50 OR MORE PERSONS ENGAGED	23	0	1,964	44	2,008	2,008
TOTAL	1,008	375	7,050	110	7,160	7,835
ALL SERVICES LISTED ABOVE						
1 PERSON ENGAGED	1,825	1,361	417	47	464	1,825
2 PERSONS ENGAGED	1,667	1,370	1,647	317	1,964	3,334
3 PERSONS ENGAGED	1,138	968	2,015	431	2,446	3,414
4 PERSONS ENGAGED	808	642	2,190	400	2,590	3,232
5 - 9 PERSONS ENGAGED	1,570	1,097	7,697	1,288	8,985	10,082
10 - 14 PERSONS ENGAGED	473	329	4,509	614	5,123	5,452
15 - 19 PERSONS ENGAGED	215	168	2,986	464	3,450	3,618
20 - 49 PERSONS ENGAGED	333	238	8,161	1,356	9,517	9,755
50 OR MORE PERSONS ENGAGED	156	294	12,798	7,070	[illegible]	20,162
TOTAL	8,185	6,467	42,420	11,987	[illegible]	60,874

Source:Central Statistics Office.Dublin

QUESTIONNAIRE Date:

Company Name:

Respondent Status:

Q1 Nature of Business:
Hotel 0 Restaurant 1 BUS_________

Q2 Market Type:
Domestic: 1
International: 2
Both: 3 MARKET_______

SECTION 1

Q3 In your own words, what is the prime concern of your company?
(i.e. sales, research, staff training, ad. & promotion) REABUS_______

____

____

Q4 In your company, how do you rate the following activities for their effectiveness. (10 highest, 1 lowest).

Advertising	EFCTAD_______
Support Selling	EFCTSELL______
Buyer/Customer Research	EFCTCUST______
Competitor Research	EFTCOMR______
Merchandising	EFTMER________
Product/Service Identification	EFTSER________
Market Sales Forecasting	EFTMSF________
New Product Development	EFTNPD________
Niche/Market Segmentation	EFTMSEG______

Q5 1. Why do you rate (highest) so highly RATH1_________

____

Q5 2. Why do you rate (lowest) so low RATLO_________

____

Q6 1. How do you rate your company's level of marketing expertise, (10 highest, 1 lowest) MKTEX_________

Q6 2. What specifically influences this rating? WHYEX_________

____

Q7 1. How many employees are there in your company/division: NOSTFT________ NOSTPT________

F.T._______

P.T._______

D.K._______

Q8 1. Does your company have a separate marketing department? MARKDEP_______

Yes.______No.______ (Go to 9.1)

Q8 2. (If yest), How many people are employed in this department? NUMDEPT________

Num.______

Q9 1. Do. you consider your marketing staff to have particular strengths in any of the following areas:

Marketing	Yes ________	No ________	MKTSR________
	Why ________		YMKTSR________
Management	Yes ________	No ________	MANSTR________
	Why ________		YMANSTR________
Selling	Yes ________	No ________	SELSTR________
	Why ________		YSELSTR________
Customer Relations	Yes ________	No ________	CRSTR________
	Why ________		YCUSTR________

Q10 1. Is any further training undertaken by your staff? Y___ N___ (Go to 11.3a) FURTRAIN_______

Q10 2. (If yes), In-house:______ External:_______ Both:______ TYPTRAIN_______

Q10 3. Is further training obligatory: Y____ N_____ (Go to 10.6) TRAINOBL_______

Q10 4. (If yes), Are there penalties of non-achievers:Y____ N____ (Go to 8.6d) PANALTS_______

Q10 5. What form might these penalties take? PENFORM_______

____

Q10 6. (If no) Why not?________________________________ YNOPEN_______

Q11 1. Are incentives offered for further training: Y___ N___ (Go to 9.3b) TRAINING_______

Q11 2. (If yes) What form might these take?

____ FORMINC_______

Q11 3. (If no), Why not?________________________________ NOINC_______

Q12 1. What specific qualifications would you consider most appropriate for someone on your marketing staff:

Academic:________________________________ QUALED_______

Professional:____________________________ QUALPROF_______

Personal:________________________________ QUALPER_______

Q13 1. Does your company prepare a separate budget for marketing activities? Yes:_____ N:_____ MKTBUDG_______

Q14 1. On what basis is this done:

Against sales:____________________

Against profit:____________________

Task by Task basis:________________

Same as last time:_________________

What can be afforded:______________

Market average____________________

None of these (specify):____________ BUDGBAS_______

Q15 1. What effect, if any do marketing decisions have on the following activities:

	Very Influential	Influential	Neither/nor Influential	Not very Influential	Not Influential at all	
Sales						MDECSAL_______
Catering						MDECCAT_______
Accommodation						MDECAC_______
Personnel						MDECPER_______
Activities						MDECACT_______

Q15 1. What effect (if any), do marketing decisions have on the following activities:

	Very Influential	Influential	Neither/Nor Influential	Not very influential	Not influential at all	
Customer Amenities						MDECU_______
Staff Recruitment Policy						MDECSR_______
Business Hours:						MDECBUS_______
Job Design						MDECJD_______

Q16 1. Has your company undertaken any marketing research within the past : 12 months:_______ 6 months _______ 3 months _______ DMKRS_______

None of these_____________(Go to 16.1)

Q16 2. (If yes) What was the topic of the research?

____ RESTOP_______

Q16 3. Was this research conducted by your company? Y____ N____ RESAG________

Q16 4 What proportion of your company's marketing budget is allocated to market research________________________ RESBUDG________

COMPETITOR ORIENTATION

Please name the first and second most important Competitors/ Rivals: 1____

2____

Q17 1 Please state why you see them as such:

1____ COMPON________

2____ COMPTO________

Q18 1. Do you actively try to differentiate your service mix from that of your competitors? Y_____ N_____ DEERMX________

Q18 2. (If yes), on what basis is this done?

____ BASMX________

Q19 1 Does your company apply the principles of niche or specialised target marketing? Y____ N____ (Go to 20.1) NMARK________

Q19 2 (If yes), On what basis is this done?

____ NBAS________

Q20 1 Please rank the most important sources of information used in developing your business plans (10 highest, 1 lowest)

In-house sales	____	VSAL________
Primary research	____	VRES________
Secondary/desk research	____	VDRES________
Unsolicited Info.	____	VUNSOL________

Q21 1 Please indicate the importance to your company of the following promotional activities (10 highest 1 lowest)

Media advertising	______	IMPAD__________
Personal selling	______	IMPPS__________
Direct Mail	______	IMPDM__________
Exhibitions/Trade Fairs	______	IMPEX__________
Public Relations	______	IMPPR__________

Q22 1 How do you rate your company against your nearest competitor, on the following aspects:

ASPECTS	V. High	High	Average	Low	V.Low	
Service Range						COSER__________
Management Ability						COMAN__________
Staff Skills						COSS__________
Customer Orientation						COCO__________
Premises/Decor						COPD__________
Promotional Activities						COPA__________
Price						COPR__________
Research						CORS__________

CUSTOMER ORIENTATION

Q23 1 Please indicate the extent to which you agree/disagree with the following statements:

	Strongly Agree	Agree	neither/ nor dis.	Disagree	Strongly Disagree	
A salesperson should have the company's best interest at heart						COINT__________
The prime consideration is to keep the customer satisfied.						CUSAT__________
Our customers may view us as experts and expect us to make decisions on their behalf						STAFEX__________
Selling is vital, so sometimes corners get cut.						SALVI__________
Because customers are reluctant to complain, there is a danger that we don't know when we are wrong						CUSCOM__________
It's best not to tell our customers what to expect so they won't be be disappointed.						CUSEX__________

Q24 1 What proportion of your work-force are employed to deal with the public (Face to face)________________ CUSTAF________

Q24 2 How would you rate them in their ability to deal with customers (10 highest, 1 lowest)________________ STAFRAT________

Q25 1 Do you ever call upon your staff to perform tasks for which they are not formally qualified or trained Y___ N___ TASTAF________

Q25 2 (If yes) V.Freq___Freq___Neither/nor___Not V. Freq___ TASFREQ________

Q25 3 Under what circumstances might this happen?

________________________________ TASCIR________

Q26 1. Over the past 5 years, has the number of customer commendations, Risen___Stayed the same___ Fallen___ CUSCOM________

Q26 2 Over the past 5 years, has the number of complaints: Risen___ Stayed the same___ Fallen___ CUSCOP________

PROCESS

Q27 1 Has a formal job specification been drawn up for the following staff functions:

	Yes	No	
Marketing			SPMARK________
Management			SPAMAN________
Sales			SPSA________
Personnel			SPPER________

Q27 2 Do these specifications state a minimum qualification?
Y_____ N_____ MINQU________

Q28 1 Which department is specifically responsible for supervising staff who deal directly and exclusively with customers?

________________________________ STAFRES________

Q29 1 What is your main source of recruitment?________________

________________________________ RECSOR________

Q30 1 What % of customer staff time is spent dealing directly with the public?________________ STAFTIM________

Q31 1 Does your company offer any performance-based incentives to your service personnel? Y___ N___(Go to 33.1) STAFINC________

Q31 2. (If yes), ON what basis are these awarded?

Time___ Skill___ Quality___ Customer Throughput___

Customer Referral___ Revenue Generated___ Other (Specify)

____ INCBAS________

Q31 3 What is the nature of these awards?________________

Financial___ Time___ Other (Specify)________________ INCAW________

Q31 4. What is the extent of effect (if any), these incentives have had on the following.

	V.Great	Great	Neither/Nor	Some	None	
Profit						EPPROF________
Sales Volume						EFSAL________
Staff Relations						EFSR________
Customer .Satisfation						EFCS________
Repeat Custom						EFRC________

ORGANISATIONAL CHARACTERISTICS

Q32 1 To what specifically within your company, do you attribute your company's success, to date?____________

____ RESES________

Q33 1. What particular external influences affect your company?

1.____

(any more)

2.____

(any more) EXEFS________

3.____

Q33 2. (If more than one) Which would you rank as the most important?________________________ EXIMP________

Q34 1. Why?________________________________ YIMP________

____

Q35 1. How would you compare the performance of your company in the last financial year, against the previous 5 years on av.

	Much Better	Better	About the same	Worse	Much Worse	
Profit						PERPROF________
Sales Vol						PERSV________
Mkt. Share						PERMS________

Q36 1 (Over the past 5 years) Has your company introduced any new facilities specifically designed, with your customers in mine? Y____N____ (Go to 37.1) NEWFAC______

Q36 2. Whey?______________ FACAGE______

Q36 3. What?______________________________________ FACTYP______

Q36 4 What effect have these new facilities had on the following:

	Much Better	Better	About the same	Worse	Much Worse	
Profit						FACPROF______
Sales Volume						FACSV______
Market share						FACMS______

Q37 1. Over the past 5 years, Has your company introduced any new personnel practices, specifically designed, with your customers in mind? Y_____ N______ (Go to 39.1) PERPRAC______

Q37 2. When?____________________ PRACAGE______

Q37 3. What?____ PRACTYP______

Q37 4. What effect have these personnel practices had on the following:

	Much Better	Better	About the Same	Worse	Much Worse	
Profit						PRACPROF______
Sales Volume						PRACSV______
Market Share						PRACMS______

Q38 1. Is your company affiliated to any professional organisation(s) Y____N_____ (If no got to 40.1) ORGAFL______

Q38 2. Please list 1.______________________________ ORGTYPO______

(any more)

2.______________________________ ORGTYPT______

(any more)

3.______________________________

Q38 3. How closely do you associate your company with organisation

V.Close___Close____Neither close/nor dist____

Not close___ Distant___ ORGCLO______

Q38 4. (If close) In what way?______________________________ ORGWAY______

____

Q38 5. (If not close) Why?______________________________

______________________________ ORGNWAY______

Q39 1. What specific benefits does your company derive from membership of organisation No.1.__________________

______________________________ BENMEN______

Q40 1. In your own owrds, what should the Irish Tourism Industry do to improve their lot? TOURIMP______

____

____

____

____

____

____

____

(Thank you very much for your time and assistance)

LIST OF

RESPONDENT HOTELS AND RESTAURANTS

LIST OF RESPONDENT HOTELS
AISHLING HOTEL
BERKELEY COURT HOTEL
BLOOMS HOTEL
BUSWELLS
DALKEY ISLAND
DERGVALE
FITZPATRICKS CASTLE
HOTEL CONRAD
INTERNATIONAL AIRPORT HOTEL
KILTERNAN COUNTRY CLUB
MARINE HOTEL SUTTON
ORMOND LODGE
ORWELL LODGE
PORTVIEW HOTEL
REGENCY HOTEL
ROYAL MARINE DUN LAOGHAIRE
STEPHENS HALL
STUART HOTEL
SUTTON CASTLE
VICTOR HOTEL

LIST OF RESPONDENT RESTAURANTS
BALROTHERY INN
BEAUFIELD MEWS
BITS N'PIZZAS
BON APPETITE
BONNE BOUCHEE
CAPTAIN AMERICA'S
CELTIC MEWS
CLONTARF CASTLE
COURTYARD RESTAURANT
DE SELBYS
DOBBINS
FOXES COVERT
GEORGES BISTRO
GOAT
INDEPENDENT PIZZA CO
INT.AIRPORT HOTEL REST.
KING CITRIC
KITTY O'SHEAS
LORD EDWARD
McCORMACK
OLD DUBLIN
OLD SCHOOLHOUSE
OUTLAWS
PANTHER CATERING
PERIWINKLE SEAFOOD REST.
RIVERBANK REST.
STREETS
TROCADERO
UNICORN
WITH TASTE

DUBLIN TOURISM REGISTER OF MEMBERS,1991.

AA Hostels

Kings Hospital
Trinity College
Trinity Hall
University College Dublin

BF Bord Failte

Bord Failte Eireann

CC Caravan & Camping

North Beach Caravan & Camp
Shankill Caravan Park

FD Food & Drink

Abbey Travern
Alexandra Restaurant
Ali-Baba Restaurant
Alix Gardner's Cookery School
Anvil Restaurant
Arnotts Restaurant
Ayumi-Ya Japanese Restaurant
Bad Ass Cafe
Baggot Inn
Balrothery Inn
Batz Restaurant
Beaufield Mews
Beefeaters Restaurant
Beshoff Restaurants
Bewleys
Bistro Vino
Bits & Pizzas
Blazes Restaurant
Bon Appetit
Braemore Rooms
Brahms & Liszt Restaurant
Breakers Restaurant
Broker Restaurant
Burger King Restaurant
Caesars Restaurant
Captain America's
Cedar Tree Restaurant
Celtic Mews Restaurant

Chicago Pizza Pie Factory
Clontarf Castle
Coffers Restaurant
Country Club Hotel Restaurant
Courtyard Restaurant
Davy Byrne's
De Selby's Restaurant
Digby's Restaurant
Dillons Restaurant
Dobbins Wine Bistro
Dorans
Dublin Airport Restaurant
Eastern Tandoori
Eighteen (18th) Precinct Restaurant
Ernies Restaurant
Eureka Restaurant
Flannagans Restaurant
Food For Thought Restaurant
Foxes Covert, Molloy Tavern Group
FXB's Restaurant
George's Bistro
Grey Door Restaurant
Healys Black Lion Inn
Heuston Restaurant
Howth Lodge Hotel Restaurant
Independent Pizza Company
International Food Court
Kapriol Restaurant
Keating, Mr. John M.
King Sitric Restaurant
Kingsbridge Restaurant
Kingswood Country House Restaurant
Kitty O'Sheas
L'Ecrivain Restaurant
La Bonne Bouche Restaurant,
La Vie En Rose Restaurant
Lane Gallery Restaurant
Le Caprice Restaurant
Le Coq Hardi Restaurant
Les Freres Jacques Restaurant
Locks Restaurant
Lord Edward Restaurant
Malahide Castle Restaurant
McCormack, P.& Sons
McDonald's Restaurant
Mitchell's Cellars

Molly's Basket Ltd
Mother Redcaps Tavern
Norseman Public House
North Star Hotel Restaurant
O'Rourkes Restaurant
Old Dublin Restaurant
Old Schoolhouse Restaurant
Outlaws Restaurant
Pasta Fresca Restaurant
Pasta Nostra
Patrick Guilbaud Restaurant
Pepper Cannister Restaurant
Periwinkle Seafood Bar
Pings Chinese Restaurant
Poco Loco
Puerto-Bella Restaurant
Rajdoot Tandoori Restaurant
Red Bank Restaurant
Regency Airport Hotel Restaurant
Restaurant Na Mara
Riverbank Restaurant
Royal Garden Chinese Restaurant
Sands Hotel Restaurant,
Sheries Restaurant
Slatterys Public House
Soup Bowl Restaurant
South Bank Restaurant
Streets Rathmines
Topo Gigio Restaurant
Tosca Restaurant
Trocadero Restaurant
Trudi's Restaurant
Unicorn Restaurant
Well Fed Cafe
Windmill Restaurant
Wishbone Restaurant
With Taste Restaurant
Wongs Restaurant
Yellow House Restaurant

FH - Farmhouse

Clinton, Mrs. M
Johnston, Mrs. D
Stevenson, Mrs. S E

HG - Guesthouses

Abrae Court Guesthouse
Anglesea Town House
Antrim Arms Guesthouse
Ariel House Guesthouse
Beddington Guesthouse
Burtenshaws, Marian Guesthouse
Carrick Hall Guesthouse
Clara House Guesthouse
Dorchester House Guesthouse
Egans Guesthouse
Fitzwilliam Guesthouse
Harveys Guesthouse
Highfield Guesthouse
Iona Guesthouse
Kilronan House Guesthouse
Maples Guesthouse
Mount Herbert Guesthouse
Othello House
Parkview Guesthouse
Phoenix Park House Guesthouse
Raglan Lodge Guesthouse
Sea View Guesthouse
St. Aidans Guesthouse
St. Andrews Guesthouse
St. Judes Guesthouse
Stella Maris Guesthouse
Tramore Guesthouse
Uppercross House
Waverley House

HH Hotels

Ashling Hotel
Berkeley Court Hotel
Blooms Hotel
Burlington Hotel
Buswells Hotel
Castle Hotel
Central Hotel
Clarence Hotel
Clifton Court Hotel
Court Hotel, Killiney Bay
Dalkey Island Hotel
Deerpark Hotel

Dergvale Hotel
Dunnes Hotel
Fingal Hotel
Finnstown House Hotel
Fitzpatricks Castle Hotel
Gate Hotel
Grand Hotel
Green Isle Hotel
Gresham Hotel
Grove Hotel
Harcourt Hotel
Hawthorn House Hotel
Hollybrook Hotel
Holmpatrick Hotel
Hotel Conrad
Howth Lodge Hotel
International Airport Hotel
Jenson Hotel
Jurys Hotel
Kellys Hotel
Kilternan Country Club Hotel
Kingston Hotel
Lansdowne Hotel
Leeson Court Hotel
Lenehan Hotel
Longfields Hotel
Lucan Spa Hotel
Mapel Hotel
Marine Hotel
Marley Park Hotel
Mont Clare Hotel
Montrose Hotel
North Star Hotel
O'Briens Hotel
O'Shea's Hotel
Ormond Hotel
Orwell Lodge Hotel
Park Lodge Hotel
Pierre Hotel
Portmarnock Country Club Hotel
Portview Hotel
Rathgar Hotel
Regency Airport Hotel
Royal Dublin Hotel
Royal Marine Hotel
Russell Court Hotel

Sachs Hotel
Saint Laurence Hotel
Sands Hotel
Shelbourne Hotel
Shieling Hotel
Skylon Hotel
Stephen's Hall Hotel
Stillorgan Park Hotel
Stuart Hotel
Sunnybank Hotel
Sutton Castle Hotel
Talbot Hotel Wexford
Tara Towers Hotel
Victor Hotel
West County Hotel
Westbury Hotel
Wynns Hotel
Ziegfield Hotel

HS Hostels

An Oige
Isaac
Kinlay House
Y.W.C.A.

OB Other Business

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Adelphi Carlton Ltd.
Aer Rianta
Allied Irish Bank
American Telephones & Telegraphs
Ansbacher & Co. Ltd.
Argosy Ltd.
Argus Security Ltd.
Arnotts Plc.
Ashlin Coleman Heelan
ATA Security
Baldoyle Traders Limited
Barclay Distributors
Batt, Mr. Leopold
Belleek Pottery Ltd.
BIC Ireland Limited
Breen, Ms. Helen
Brennan Insurances Ltd.

Brochure Distributors
Browne Thomas & Co. Ltd.
Brugha, Mr. Ruairi
Cement Roadstone Holdings PLC
Central Remedial Clinic
Circle Press Ltd.
Claris Ireland Ltd.
Comcal Systems Ltd.
Computer Accessories Ltd.
Cooke Antiques
Coyle Hamilton Group Ltd.
Craft Print Ltd.
Dalkey Video Production Ltd.
Dolphin Discs
Dublin Chamber of Commerce
Dublin Crystal Glass
Dublin Design Studios
Dublin Ice Rink
Dublin Port and Docks Board
Dublin Woollen Company Ltd.
Dunns Seafare Ltd.
Eason & Son
Ebony Giftware
Educational Building Society
E.S.B.
Ernst & Young
Events of the Week
First National Building Society
Fitzgerald, Mr. Alexis
Foreign Exchange Company of Ireland
Fred Hanna Ltd.
G.A.A.
Gallagher Dublin Ltd.
Gallagher, Mr. John
Ganly, Mr. Michael
Genealogy Bookshop
Giffney, Mr. M.P.
Gilbeys of Ireland Ltd.
Giraffes Playcentre
Gowna Construction
Ground Support Services
Guinness Group Sales Ireland Ltd.
Heraldic Artists
Hilton Papers
Hinde John & Co.
Hogan, Mr. Joseph

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Insight Cards Ltd.
Institute of Education
International Colour Web Ltd.
Irish Distillers PLC
Irish Giftshops
Irish Jewish Museum
Irish Times Ltd.
Jones, Lang, Wooton Ltd.
Jordan, Hugh & Co.
K-Sera
Keating, J.F. & Sons Ltd.
Kelly & Co., Dublin Ltd.
Kennedy & McSharry
Kennedy Gallery
Kevin & Howlin Ltd.
Kilkenny Shop
Leydens Ltd.
Lynch Contractors
M.J. Flood Ireland Ltd.
Maltons Gallery
McDonnell, Mr. R.
McLoughlin, Mr. Christopher
Modern Display Artist
Morton, John Ltd.
National Toll Roads Plc.
Newspread Ltd.
N.F.G. Enterprizes
Nolan, Mr. David
O'Connor, Ms. Ann
O'Kelly, Mr. Desmond Ray
Odlum Group
Old Dublin Society
Palmer Brothers Ltd.
Paperweight
Peter Mark Hair Salons
Phelan, Mr. Basil
Pittman, Mr. David
Portmarnock Sports and Leisure Centre
Positive Image
Power Securities Ltd.
Printout
Prospect Design
Purcell, Brian & Margaret
Raleigh Ireland Ltd.
Real Ireland

Restan Jack Displays
Richards Jonathan & Co. Ltd.
Richview Browne & Nolan
Roches Stores (Blackrock)
Roches Stores (Henry Street)
Royal Dublin Society
Royal Hospital Kilmainham
Royal Zoological Society
SIPTU
Sawers 1959 Ltd.
Shaffrey P. & Associates
Slattery Office Supplies
Scource Designs Ltd.
Specialised Services Limited
Sweater Shop
Swift Couriers
Switzers
Swords Hardware
Temple Bar Gallery & Studios
The Square Towncentre
Tierneys Giftshops
Tivoli Theatre
Views Unlimited
Wavin Ireland Ltd.
Weir & Son Dublin Ltd.
Wellcome Ireland Ltd.
Wood Printcraft Ltd.
Wrights of Marino Ltd.

S.C. - Self Catering

O'Connor, Mr. Rory
Ahern, Mrs. Eileen
Archer, Mr. Mark
Aylmer, Mrs. Bridget
Barman, Ms. K.
Benson, Mr. Frank
Betson, Ms. Nuala
Bohan, Ms. Helen
Bolger, Ms. Audrey
Bourke, Ms. Terry
Bradley, Ms. Charlotte
Brannigan, Mrs. Martina
Brennan, Mr. Sean
Brookman Town Homes
Brophy, Mrs. Mary

Brosnan, Mr. Vincent
Brown, Mr. David
Burke, Dr. & Mrs. Andrew
Byrne, Mrs. S.
Byrne, Ms. F.
Colton, Mrs. Ann
Cosgrove, Mrs. M.
Davies, Mrs. Elizabeth
Delap, Mr. Charles
Dempsey, Mrs. Susan
Donnelly, Ms. M.
Doyle, Mrs. Maureen
Duffy, Mr. G.A.
Duggan, Ms. Therese
Egan, Mrs. Mary
Executive Holiday Homes
Fallon, Ms. M.
Fay, Mr. Patrick
Fitzpatrick, Mr. Gerard
Gallagher, Ms. Josephine
Gavin, Mrs.
Gilmore, Mrs. A.
Henneghan, Ms. Enda
Hogan, Mr. Patrick
Hughes, Ms. Mona
Jobling-Purser, Mrs. Julliet
Keating, Ms. Nora
Kelly, Mrs. Catherine
Kierans, Mr. F.
Kiggins, Mr. Joseph
Lowe, Mr. Patrick
Lynam, Mrs. Mary
Lynch, Mrs. Evelyn
Macken, Ms. Carol
Magee, Mrs. Mary
Mahon, Mr. Denis
Mahony, Mr. Noel
Marshall, Mr. Ray
McAney, Mr. Matt
McDermott, Ms. Lorna
McGivern, Mrs.
McGrath, Ms. Josephine
Merrion Townhomes
Molyneaux, Ms. Joan
Mooney, Mrs. Mary
Moran Developments

Murphy, Mrs. M
Nally, Mrs. Joan
Nolan, Mrs. Elizabeth
Noone, Ms. Josephine
O'Briain, Ms. Nuala
O'Brian, Mr. P.A.
O'Connor, Mrs. Cecily
O'Connor, Ms. Consuelo
O'Kelly, Mrs. Finola
O'Neill, Mrs. H.
O'Shea, Mrs. Bernadette
O'Sullivan, Mrs. Lucinda
Rodgers, Ms. Ann
Sandymount Executive Holiday Homes
Skerries Golf Club
Southwood Town Homes
Stack, Mrs. Nora
Sweeney, Mr. Noel
Treacy, Ms. Mary
Trident Holiday Homes
Walsh, Mr. E.
Walsh, Mr. J.
Walsh, Mrs. Nora

<u>T.C. - Town & Country Homes</u>

Abbot-Murphy, Mrs. D
Anderson, Mrs. V
Armstrong, Ms. Diane
Askew, Mrs. A.
Barker, Mrs. V.
Barnes, Mrs. D.
Barry, Mrs. M.
Basquille, Mrs. M.
Bennett, Mr. G.
Bermingham, Mrs. M.
Betson, Mrs. Nuala
Bird, Mrs. M.
Bird, Mrs. Maura
Boylan, Mrs. Teresa
Boyle, Mrs. A.
Brannagh-Walshe, Ms. Marie
Brannigan, Mrs. Anne
Brazil, Mrs. Teresa
Brennan, Mrs. Mary
Burke, Mrs. K.

Burke, Ms. Marie
Byrne, Mrs. M.
Byrne, Ms. Mary
Byrne-Poole, Mrs. E.
Cahill, Mrs. E.
Callaghan, Mrs. Carmel
Callaghan, Mrs. E.
Callanan, Mrs. H.
Canavan, Mrs. C.
Carey, Mrs. N.
Carolan, Mrs. M.
Casey, Mrs. R.
Cavannagh, Mrs. Catherine
Chambers, Mrs. C.
Clarke, Mrs. Sue
Clifford-Sanderson, Ms.
Clinton, Mrs. Violet
Cole, Mrs. K. M.
Coman, Mrs. Mary
Condron, Ms. Pauline
Conlon, Mrs. G.
Connolly, Mrs. C.
Corr-Dawhl, Mrs. A.
Corrigan, Mrs. T.
Cawley, Mrs. Kathleen
Creagh, Mrs. B.
Creane, Mrs. M.
Crowley, Mrs. W.
Cumiskey-Kelly, Mrs. Eileen
Cummins, Mrs. M.
Cunningham, Mr. Joseph
Cunningham-Murray, Mrs.
Curley, Mr. D.
D'Alton, Mrs. A.
Daly, Mrs. R.
De Reymont, Mrs. M.
Delahunty, Mrs. E.
Delahunty, Mrs. S.
Devine, Mrs. Z
Di Felice, Ms. Colette
Doherty, Mrs. E.
Dolan, Mrs. M.
Donnellan, Ms. Joan
Doran, Mrs. N.
Doyle, Mrs. R.
Doyle, Mrs. S.

Doyle, Mrs. Tillie
Drain, Mrs. C.
Duffy, Mrs. V.
Duggan, Mrs. D.
Duggan, Mrs. K.
Dundon, Mr. Martin
Dunne, Mr. & Mrs. M
Dunne, Mrs. M.
Dunwoody, Mrs. M
Durkan, Mrs. M.
Dwyer, Mrs. H.
Edgeworth, Mrs. M
Egan, Mrs. Oonagh
Egan, Ms. M.
Farrell, Mrs. D.
Farrell, Mrs. P.
Farrell, Mrs. P.
Farrelly, Mrs. M.
Farrelly, Mrs. Sarah
Farry, Ms. Colette
Field, Mrs. Ann
Fitzgibbon, Mrs. V.
Fitzsimons, Mrs. M.
Floyd, Mrs. S.
Forde, Mrs. S.
Gallagher, Mrs. M.
Gammell, Mrs. R.
Gannon, Ms. Kay
Gardiner, Mrs. Angela
Gaule, Mrs. Emma
Gavin, Mrs. M.
Geary, Mrs. B.
Geoghegan, Paul & Carmel
Gibbons, Mrs.
Gibson, Mrs. Hilda
Gorby, Maura & Gerry
Gorby, Ms. Patricia
Graham, Mrs. P
Grainger, Ms. Ann
Grennan, Mrs. M.
Greville, Mrs. K.
Griffin, Mrs. Ann
Griffin, Mrs. K.
Haines, Ms. Marie
Hamilton, Mrs. Helen
Handley, Ms. Noreen

Hanley, Mrs. Liz
Harahan, Mrs. M.
Harkin, Mrs. A.
Hayes, Ms. Thelma
Healy, Mrs. A.
Henneghan, Ms. Margaret
Hennessy, Mrs. Mary
Hickey, Mrs. G.
Hickey, Ms. A.
Higgins, Mr. & Mrs.
Hobbs, Mrs. R.
Holden, Mrs. L.
Hosford, Ms. Mary
Hughes, Mrs. Francis
Hurney, Mrs. K.
Hyland, Mrs. J.
Jackson, Mrs. M.
Kane, Mrs. M.
Kane, Mrs. May
Kavanagh, Mrs. M.
Keane, Ms. Ann-Marie
Kearney, Mrs. Ann
Kearney, Mrs. M.
Kelly, Mrs. E.
Kelly, Vincent & Helen
Kennedy, Mrs. C.
Kenny, Mrs. N.
Kenny, Mrs. Rita
Kenny, Patrick & Elizabeth
Keogh, Mrs. M.
Lambert, Mrs. M.
Larkin, Mrs. Stephanie
Lavelle, Mrs. Mary
Lawlor, Mrs. A.
Leahy, Mrs. M.
Lee, Mrs. Kathleen
Lee, Mrs. Mary
Lehane, Mrs. M.
Leonard, Mrs. H.
Levins, Mrs. A.
Lloyd, Ms. Maura
Logue, Mrs. P.
Lynn, Mrs. B.
Lynn, Suzanne
Malone, Mrs. Nancy
Matthews, Mrs. S.

McAnaney, Mrs. Betty
McBride, Mrs. N.
McCabe, Mrs. C.
McCann, Mrs. P.
McClafferty, Ms. M.
McDonagh, Mrs. J.
McDonagh, Mrs. R.
McDonald, Mrs. Ethna
McDonnell, Mrs. M.
McEdgar, Mrs. B.
McEvoy, Mrs. K.
McGloughlin, Gretta
McGreal, Mrs. M.
McGuinness Family
McKenna, Mrs. S.
McLaughlin, Mrs. Deirdre
McLaughlin, Mrs. J.
McLoughlin, Mrs. Margaret
McLoughlin, Ms. Maragaret
McMahon, Mrs. M.
McMahon, Mrs. M.
McMahon, Mrs. M.
McNamee, Mrs. E.
McNamee, Mrs. J. G.
McTernan, Mrs. S.
Meagher, Mrs. Gerty
Millar, Mrs. M.
Moher, Ms. E.
Mooney, Mrs. Mary
Moorehead, Mrs. M.
Moran, Mrs. M.
Morgan, Mrs. E.
Morris, Mrs. J.
Muldoon, Mrs. Teresa
Murnane, Mrs. J.
Murphy, David & Aine
Murphy, Mrs. Ann
Murphy, Mrs. J.
Murphy, Mrs. M.
Murphy, Mrs. M.
Murphy, Mrs. Mary
Nohilly, Mrs. Geraldine
O'Dea, Ms. Joanne
O'Beirne, Mrs. B.
O'Brien, J. & I.
O'Brien, Mrs. E.

O'Brien, Mrs. Elizabeth
O'Brien, Mrs. K.
O'Connell, Mrs. C.
O'Connor, Mr. & Mrs.
O'Connor, Mrs. B.
O'Connor, Mrs. M.
O'Connor, Mrs. M.
O'Dolan, Mrs. Ann
O'Donoghue, Mrs. E.
O'Donovan, Mrs. A.
O'Driscoll, Mrs. M. J.
O'Flaherty, Mrs. M.
O'Kelly, Mrs. M.
O'Leary, Jane
O'Leary, Ms. Bridie
O'Mahony, Mrs. E.
O'Malley, Ms. Geraldine,
O'Reilly, Mrs. M.
O'Reilly, Mrs. M.
O'Riordan, Mrs. Aileen
O'Shea, Mrs. L.
O'Sullivan, Mrs. C.
O'Sullivan, Mrs. M.
O'Toole, Mrs. N.
O'Toole, Ms. Annette
Patten, Mrs. N.
Pitman, Mrs. D.
Potter, Mrs. Norah
Power, Mrs. E.
Power, Mrs. M.
Quigley, Noel & Fiona
Rickard, Mrs. K.
Ryan, Mrs. Catherine,
Ryan, Mrs. M.
Ryan, Mrs. T.
Savage, Mrs. C.
Seaver, Mrs. R.
Sheeran, Mrs. E.
Sheridan, Mrs. M.
Shouldice, Mrs. J.
Smith, Ms. Dolores
Smyth, Mrs. M.
Soden, Mrs. N.
Spillane, Mrs. M.
Sullivan, Mrs. A.
Swan, Mrs. M.

Tarrant, Mrs. Angela
Taylor, Ms. Nora
Thomas, Mrs. Rita
Tonkin, Mrs. M.
Treanor, Mrs. T.
Trehy, Mrs. E.
Tyrrell, Mrs. Eileen
Walsh, Mrs. Margaret
White, Mrs. S.
Wolfe, Mrs. B.
Yalloway, Mrs. M.

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T.R. Travel & Transport

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Dan Dooley-Kenning Car Hire Co.
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Intercontinental Travel Agency
Kavanagh, Matt Coaches
Kavanagh, Mr. Bernard & Sons
Kavanagh Pearse Coaches
Kevin Shannon Tours
Metro Cabs
Moloney & Kelly Travel
Murrays Eurocar Ltd.
PAB Coach Tours
Sealink
South County Car Rentals
TRAVAC Ltd.
USIT Travel Ltd.
Windsor Motors Ltd.