

MARKETING CULTURAL RESOURCES: TOWARDS ORGANISATIONAL BEST PRACTICE

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Dissertation in Partial Fulfilment of the Requirements for
the Degree of MSc in Marketing Practice

11th September 2008

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ABSTRACT

The importance of cultural resources for Ireland's tourism industry is widely acknowledged. This study examines the reciprocal contribution of tourism for the sustainability of these cultural resources and the subsequent role of marketing. This research makes a worthwhile contribution to the development of thinking and practice around the marketing of cultural resources.

The research methodology represents a predominately descriptive research design with an element of exploratory research. The research process involved phase one, a survey of 224 heritage attractions in Ireland and phase two, semi-structured interviews with the organisations that represent the attractions.

Marketing's role in enabling sites to satisfy visitors' expectations and manage their impacts without compromising authenticity is discussed. If implemented correctly, exposure and education can facilitate the appreciation of heritage resulting in tourism having a positive, rather than negative, impact on heritage sites.

The findings suggest that market research and marketing communication are vital in achieving a balance between targeting cultural tourists and tourists with no specific interest in heritage. However, they do not appear to be used to their full potential in Irish heritage attractions. An additional element of the marketing mix is identified, demarketing, a term first coined by Kotler in 1971. Demarketing may be consciously or unconsciously utilised in the efforts to control visitor volumes and impacts.

A combined commitment to visitor research by the individual heritage sites could provide information to the representative organisations to facilitate target marketing aimed at sites capable of accommodating high visitor volumes. However, a change of mindset is required among heritage practitioners regarding the uses of marketing in general, which is achievable through education, study of models of best practice, assistance and feedback.

ACKNOWLEDGEMENTS

Many people have contributed to this dissertation and I wish to formally acknowledge and thank these people. I owe a special debt of gratitude to the following:

Mrs Kathleen McGettigan, my dissertation supervisor, for her guidance, motivation, and wonderful advice which was always so willingly provided during the course of this research.

Mr John Cronin, my employer, firstly for the inspiration for this research and secondly for the continued support, advice and flexible working arrangements which not only facilitated the undertaking of this dissertation, but the actual MSc in Marketing Practice course itself.

Ms Lucia King, Northern Ireland Tourist Board, Ms Maurica Lavery, National Trust, Ms Maeve McKeever, Fáilte Ireland, Ms Collette Scullion, Houses, Castles and Gardens of Ireland, Ms Helen Cole, Heritage Island and Ms Jacqueline McHale, Office of Public Works for their interview participation and willingness to provide any information requested throughout the research period and all heritage attractions that returned completed questionnaires.

All the MSc in Marketing Practice lecturers and fellow students who provided support and friendship throughout the past year, in particular, Ms Karen Campbell.

The library staff at Letterkenny Institute of Technology, especially Ms Isabel Stephenson, who was so helpful throughout the year.

A special thank you is owing to my fiancé, Mr Henry Doohan, for his continued encouragement and patience and because of whom, I am never alone in my endeavours.

Leanne Fullerton
September 2008

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LIST OF ABBREVIATIONS

CRM	Cultural Resource Management
CTC	Canadian Tourism Commission
ETC	European Travel Commission
HCGI	Houses Castles & Gardens of Ireland
ITIC	Irish Tourism Industry Confederation
NITB	Northern Ireland Tourist Board
NWHO	Nordic World Heritage Office
OPW	Office of Public Works
UNESCO	United Nations Educational, Scientific and Cultural Organisation
WTO	World Tourism Organisation

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Chapter 1

INTRODUCTION

1.1 Introduction

Cultural Resource Management (CRM) is essentially the management, protection and preservation of cultural resources, such as archaeological sites or artefacts, for future generations (Archaeological Institute of America, 2008). By attracting fee paying visitors, many of these sites and artefacts make an economic contribution to the tourism industry.

According to Fáilte Ireland, 2006, when people think about Irish cultural resources they think of the main attractions such as Blarney Castle and Brú na Bóinne, but other attractions are being overshadowed or undersold compared to the well-known ones. This brings to light the issue of the under-marketing of certain heritage attractions and the possible over-marketing of others. With respect to the latter of these scenarios, Drummond and Yeoman (2001), cited by Misiura (2006), advise that successful heritage tourism can threaten the assets on which it is based.

It is an issue for the management of more vulnerable and popular cultural resources to find a balance between access and preservation. However, while the management of heritage sites is out of the scope of this research, it is important to set the context for marketing such a product.

1.2 Research objectives

This study aims to explore the potential role of marketing in creating a balance between visitor impacts and the preservation of cultural resources. This is achieved by conducting an extensive review of existing literature to examine secondary data regarding marketing cultural resources in a tourism context. The literature review is discussed fully in Chapter 2.

The research also serves to determine the effect that tourism has on the preservation of Ireland's heritage and explore the role of marketing alongside visitor management

to maximise positive visitor experiences while minimising negative impacts. The perceived effect of modifications, visitor routing and staged heritage events is also examined through a survey and a series of semi-structured interviews, the findings of which are analysed in Chapter 4.

1.3 Researcher's reason for interest in the subject area

The hesitation of heritage practitioners to embrace marketing for fear of over commercialising heritage is the main reason for the researcher's interest in this area. As with many small to medium sized businesses in other industries, marketing may be considered to be merely advertising and promotion and its unplanned use can result in efforts not tailored to the specific business and in this case, giving no consideration to preservation and capacity constraints. The researcher investigates how traditional principles of commercial marketing can be adapted and used in the heritage industry where supply is often limited.

1.4 Chapter outline

Chapter 2, Literature Review, examines the theory surrounding the relationship between management and marketing at heritage attractions along with a review of the methods proposed to enable both functions to complement each other.

Chapter 3, Methodology, discusses the research objectives, research philosophy, research design, data collection methods and analysis chosen in this research.

Chapter 4, Findings and Analysis, examines the survey responses regarding the various issues addressed in the questionnaire. This is followed by a review of the semi-structured interviews, where the opinions of marketing personnel in the representative organisations regarding the overall marketing of heritage attractions in Ireland are analysed.

Chapter 5, Conclusions and Recommendations, presents the overall conclusions drawn from the research along with the researcher's recommendations for the future of marketing in the heritage industry in Ireland.

Chapter 2

LITERATURE REVIEW

2.1 Introduction

Tourism is one of Ireland's largest service sectors. In revenue terms, it generated €6.5 billion for the economy in 2007 (Irish Tourism Industry Confederation, 2008). Experiencing Ireland's heritage is a motivation for the majority of tourists, with 80 percent rating it as an important factor in their decision to visit. On average, tourists will visit more than four heritage sites while on holiday (Fáilte Ireland, 2006).

According to Fáilte Ireland (2006) cultural tourism is the point at which culture, meets tourism, a leisure activity for people that wish to become involved in a particular society. In Ireland, cultural tourism has many stakeholders involved in its marketing, including individual providers, their representatives and marketing groups. Individual providers of cultural tourism market through combinations of these stakeholders (Fáilte Ireland, 2006).

Chhabra *et al.* (2003) state that on the demand side, heritage tourism is representative of visitors' desire to experience and consume culture and in terms of supply, it is widely seen by governments and private businesses as an economic tool. The authors identify that people are nostalgic about old ways of life and want to re-live them, at least temporarily. In this vein, the main issues for heritage attractions are satisfying visitors' expectations and managing their impacts, without compromising the authenticity of the visitor experience (Fyall and Garrod, 1998).

2.2 Cultural Resource Management

Ashworth and Howard (1999), cited by Misiura (2006), simply propose that heritage is a process by which things come into the self-conscious arena when someone wants to preserve or collect them. Cultural Resource Management (CRM) is essentially the management, protection and preservation of cultural resources, such as archaeological sites or artefacts, for future generations (Archaeological Institute of America, 2008).

2.3 Economic value of cultural resources

Cultural resources potentially have economic value, in that by attracting fee paying visitors, they contribute to the tourism industry. Fáilte Ireland's Tourism Product Development Strategy 2007-2013 states that Ireland's cultural heritage is a strong magnet for tourists. Along with scenic landscapes, coastlines, rivers and lakes, cultural heritage is the bedrock upon which Irish tourism has been built (Fáilte Ireland, 2006).

2.4 Limited supply of heritage

Acknowledging the vulnerability of non-renewable resources, Fáilte Ireland's Environmental Action Plan 2007-2009, notes that Ireland's tourism industry can only be sustained if the quality of its resources is maintained. According to McKercher *et al.* (2004) popularity is not necessarily an indicator of successful cultural tourism as being too popular can cause undesirable social, experiential and physical degradation impacts on a resource.

2.4.1 Access and preservation

Misiura (2006) portrays the context for marketing heritage by suggesting that the essence of the heritage marketing process is finding out what the tourist wants and delivering it, subject to any prevailing constraints, such as having to protect parts of a heritage site or property from extra footfall generated by marketing initiatives. The author notes that marketing activities should encourage demand and satisfy the visitor but not to the detriment of what has to be preserved for future generations. For example, the Skellig Michael World Heritage Site Management Plan 2008 – 2018 proposes to manage visitor numbers by establishing a defined annual season for opening to visitors and enhancing the visitor experience by maintaining a quality guide service.

2.4.2 Impacts of too many visitors

According to Beeton (2003), in the attempt to increase revenue, marketing often only increases visitor numbers, which is the most common measure of tourism success.

The author argues that this short-term focus has an adverse effect on sustainability. The Canadian Tourism Commission (CTC) (2001) identifies the conflict of interests in managing and marketing natural heritage, with particular reference to parks.

‘The sheer volume of people using parks impacts on them, but numbers are necessary to generate income’, (CTC, 2001, p. 81).

Russo (2002), cited by Richards and Wilson (2006), outlines, what the author terms, a vicious circle of heritage tourism development in historic cities such as Venice, Italy where visitor numbers leads to a devaluation of the tourist experience. The author claims that this causes the upmarket cultural tourist to be replaced by day visitors who leave less money and more mess.

2.4.3 Impacts of not enough visitors

From a different perspective, the European Travel Commission (ETC) and the World Tourism Organisation (WTO) (2005), notes that too little tourism can also have a negative effect on cultural resources:

‘Abandoned to negligence and decay, lack of public interest and insufficient financial resources for its proper maintenance can be the consequence of too little tourism’, (ETC and WTO, 2005, p. 40).

Goeldner, *et al.* (2000), cited by Beeton (2003), propose that the two primary considerations for a destination are competitiveness and sustainability and that these should be mutually supportive. However, according to Beeton (2003), it is usually after demand has been created through effective marketing that sustainability issues and visitor management are considered.

2.5 Cultural tourism

The advantages of cultural tourism for all stakeholders are that it raises an individual’s level of education, forms part of their recreational activity and is a source of job creation (Bedate *et al.*, 2004). The authors add that cultural tourism has moved from being an activity of an elite minority to something that is now commonplace.

Misiura (2006) agrees that cultural tourism enables tourists to engage in more intellectual and specialised activities.

2.6 Marketing heritage

The marketing of heritage coincides with the birth of marketing as an academic discipline in the 1950's (Misiura, 2006). Kotler and Armstrong (2005) state that understanding, creating, communicating and delivering value and satisfaction are at the core of modern marketing. According to McManus (1997), many cultural resources have been transformed into experiences that can be marketed, sold and bought and therefore the basic marketing activities of advertising, packaging and target marketing play a central role. Middleton (1989) identifies components of a visit to an attraction that can be influenced by marketing as:

- appearance of the entrance
- ambience and motivation in reception areas
- orientation at the start of a visit
- visitor routing within an attraction
- quality of interpretation and displays
- attitudes and welcome provided by staff
- overall feeling of satisfaction and value

Wearing *et al.* (2007) add that promotion serves to ensure that the prior expectations of first time visitors are shaped so that on-site experiences meet expectations.

2.6.1 Amendments to traditional marketing

According to Guerin (2000), cultural activities and marketing do not sit well together and there is scepticism among heritage practitioners regarding the usefulness of marketing. The author suggests that what is required is a more measured understanding of marketing rather than forcing a commercially oriented model into the cultural arena. Likewise, the straightforward approach to marketing suggested by McManus (1997) is not echoed by Beeton and Benfield (2002) as they state that marketing, management and tourism development is interwoven at all stages. They

argue that it is not simply a task of researching customers, producing what they want and selling it. Beeton (2003) proposes that marketing and visitor management be integrated through demarketing, an aspect of marketing that deals with discouraging customers or a certain class of customers either temporarily or permanently. The author stresses however, that the difference between demarketing and visitor management is not so much in the activity itself, but the stage at which it is applied. Visitors tend to access marketing material at the decision stage of their trip whereas visitor management occurs when people are actually at the site (Beeton, 2003).

2.6.1.1 Environmental marketing

In tourism, environmental marketing is concerned with product development and protection when the tourism industry is dependant on natural resources (Jamrozy, 2007). The author claims that this can be taken further by creating an environmental consciousness that promotes preservation for the future. However, Kilbourne (1998) and Peattie (1999), cited by Jamrozy (2007), highlight the challenge of gaining acceptance for environmental or sustainable marketing as it requires a different way of looking at marketing.

2.7 Packaging and Interpretation

According to Apostolakis (2003), marketing in a heritage context is directed at repackaging the initial product to make it more appealing and accessible to the mass market. Craik (1997), cited by McKercher *et al.* (2004), argue that culture must be moulded for tourists or vice versa. The act of making heritage sites understandable and meaningful to visitors is known as heritage interpretation and is a central component of modern heritage tourism (Prentice *et al.*, 1998).

Visitors learn more by using interactive exhibits than traditional static exhibits. In addition, they are more attracted to interactive exhibits, spend longer at them and generally prefer them to traditional ones (Moscardo, 1996). According to Harrison (2000), interpretation involves presenting information in a form that is accessible to visitors. A study on the effects of tour guides on learning found that the experience of the tour had a significant emotional impact on visitors (Prentice *et al.*, 1998).

Moscardo (1996) expresses the importance of interpretation as a visitor management tool for relieving pressure on a heritage site. The author notes that crowding and inappropriate behaviour, such as touching delicate surfaces, littering and vandalism, can be minimised by effective interpretation that educates visitors and generates support for conservation by providing a positive visitor experience. Successful heritage attractions must effectively tell a story, make the experience participatory and relevant to the tourist, whilst providing a sense of authenticity (McKercher and du Cros, 2002, cited by McKercher *et al.*, 2004).

As cited by Chhabra *et al.* (2003), MacCannell (1979) introduced the concept of staged authenticity, whereby hosts put culture on sale to create an appealing package. However, the author claims that when the packaging alters the nature of the product, the authenticity sought by visitors becomes staged. McManus (1997) displays a similar concern by stating that tourists come to Ireland to experience the distinctive culture, not to see heritage centres and therefore culture can be packaged and interpreted too much.

2.7.1 Authenticity

The literature suggests that authenticity is often consciously used as a marketing strategy (Halewood and Hannam, 2001). However, marketing heritage involves celebrating selected aspects of the past, which on occasion, has attracted criticism (Misiura 2006). A similar criticism is that, what is marketed as history is just one version of the truth, often bearing only a partial resemblance to past events (Ashworth 1990; Ashworth and Tunbridge, 1990; Hewison, 1987; Philo and Kearns, 1993, cited by Waitt, 2000). Therefore, although authenticity is used as a marketing and promotional device, what is real is open to interpretation. McManus (1997) states that with historic monuments in particular, there may be bias in selecting what is presented in the recreation process. Apostolakis (2003) claims that the influences of marketing practices on authenticity levels and subsequently, heritage consumption are now more easily seen. According to the author, personal preferences have gained a central role and heritage attractions are more tourist-specific.

2.7.2 Demand for packaged cultural experiences

Following research of attractions' management of visitor impacts, Fyall and Garrod (1998) infer that the use of ropes, railings, perspex screens and audio-visual displays may compromise authenticity. However, Apostolakis (2003) indicates that the attributes of authenticity that interact with marketing are the perceptions of the destination on one hand and an individual's preferences on the other. Notably, Fáilte Ireland (2006) states that while cultural tourists generally have a higher regard for authenticity than others, demand exists for both authentic and packaged cultural experiences. In addition, Hughes (1995), cited by Halewood and Hannam (2001), points out that tourists often do not contrast staged authenticity against direct experience of the original, but rather with a mental image of that original which has already been corrupted by mediating influences. It has been suggested that visitors to cultural heritage attractions seek a stereotypical image of the past to reaffirm their beliefs, rather than to learn something new (Sizer 1999, cited by McKercher *et al.*, 2004).

While interpretative centres may have been over used as a means of developing the heritage industry in Ireland, their use is appropriate in certain circumstances (McManus, 1997). The author gives the example of Céide Fields Visitor Centre where the artefacts are mostly buried under bog and without an interpretative centre the value and importance of the site would be lost to most visitors.

Chhabra *et al.* (2003) combine these views by proposing that cultural tourism is centred on nostalgia and therefore, satisfaction with a heritage site or event does not necessarily depend on its authenticity, but rather on its perceived authenticity. The writer claims that every component of the experience does not need to be authentic as long as the combined experience generates nostalgic feelings. On a similar note, McKercher *et al.* (2004) propose that the quest for authenticity is less important than the desire to have an entertaining experience.

2.8 Target Marketing

Poria *et al.* (2003) advise that management at heritage attractions have two markets, those who come to see historic artefacts to be educated or for enjoyment and those

who come to be emotionally involved in an experience. According to the authors, the fact that tourists visit historic attractions for different reasons should subsequently affect their marketing. Psychographic segmentation according to perception of the site is required, which has implications on the promotional efforts. Identification of these differences can result in changes to the marketing process, the pricing system, and the interpretation provided (Poria, 2001b, 2001c, cited by Poria *et al.*, 2003).

The Nordic World Heritage Office (NWHO) (1999) refers to target marketing, where a destination aims to attract particularly desirable tourists. Such a strategy is intended to improve sustainability, as benefits such as revenues and jobs could be increased without increasing footfall. Some sites have been successful in this regard, although more than the promotional side of marketing is involved, (NWHO, 1999). Ryan (1991), cited by Eccles (1995), recommends that promotion should not use more than a quarter of the marketing mix as without due concern for product, price and place, an attraction may suffer from an unbalanced marketing approach.

Grefe (2004) maintains that by classifying visitors into categories, suitable marketing and pricing policies can be selected. The author proposes five main segments, namely, educated middle-income or affluent consumers, families with children, slightly older people with more money and free time, socially underprivileged and marginalised groups and potential associates, who, after several visits can decide to involve themselves in supporting artistic activities through donations and lobbying activities. Each segment seeks different information and experiences. Poria *et al.* (2006) maintain that the fact that the same historic artefact or site is perceived differently by different segments cannot be ignored and understanding behaviours at such places requires identifying the link between the person and the place.

2.9 Pricing

Font and Ahjem (1999) state that there is a contradiction between the danger of destroying what tourists come to see and the commercial wishes for both private and public owned attractions. According to NWHO (1999), the heritage industry tends to oppose anything that might reduce tourist volumes, including entrance fees. Fyall and Garrod (1998) state that historic properties tend to adopt token admission prices

which serve to only cover the costs of opening to the public and to track visitor numbers. What usually happens is that the entry price is set by dividing costs by the number of visitors expected (Grefe, 2004). This method ignores target marketing and does not differentiate price according to visiting conditions. According to Grefe (2004) it is beneficial to lower the admission price in periods when there are few visitors to encourage more visitors and raise the admission price in periods when there is a high volume of visitors which can diminish the quality of the visit. Beeton and Benfield (2002) on the other hand, argue that pricing has long been used to discriminate or discourage use and increasing price can reduce demand.

NWHO (1999) believes that a more realistic approach is to view culture as an input to the tourism industry for which the tourists pay, just as they pay for fuel for tour buses:

‘The user pays principle is adopted, and cultural and natural attractions are sold at a price high enough to generate the funding needed to encourage their establishment and maintenance’, (NWHO, 1999, p.19).

Fyall and Garrod (1998) appear to be of a similar opinion, stating that conservation costs exceed income at many heritage attractions. According to these authors, reluctance to charge higher admission fees has resulted in some heritage attractions increasing income by increasing visitor volumes. They consider this response to be counter productive as increasing visitors results in accelerated damage and decay. The authors conclude by stating that if by serving as a tourist attraction a site gets damaged, those responsible for the damage should pay for its prevention or repair.

2.10 Integrating management and marketing

Beeton and Benfield (2002) allege that while the tourism industry has been keen to maximise visitation and yield through marketing and promotion, less attention has been paid to accommodating or reducing high levels of demand, especially at the planning and marketing stages. Liu (2003) illustrates the relationship between management and marketing by stating that effective marketing can channel tourist demand to places that are more impact-resilient.

The ETC and WTO (2005) notes that the timing of the decision to visit a cultural attraction is of great importance for marketing purposes. According to them, the majority of cultural visitors decide to visit before leaving home, which brings about the opportunity of marketing in source regions or countries. Beeton (2003) remarks that as the majority of marketing material is consulted before arriving at an attraction, this opportunity should be used to inform potential visitors of desirable behaviour or restrictions at a site before they arrive, reducing the visitor management required.

2.10.1 Demarketing

Wicks *et al.* (2004) agree that attracting more visitors may not always be the best strategy and visitor numbers should not be the measure of success. According to the authors, the target audience should be visitors that spend the most money, have a quality learning experience, respect the local population and have the least impact on resources. They recommend demarketing and discouraging half-day visitors.

The term demarketing was first coined in 1971 by Kotler and Levy. According to Beeton and Benfield (2002), up until the 1970's, marketing dealt with an unlimited supply of product. In a reversal of this paradigm, it was noted that there were periods in the marketplace of product shortages or scarcity to which marketers had to respond (Kotler and Levy, 1971, cited by Beeton and Benfield, 2002). This response was termed demarketing and was defined as an aspect of marketing that deals with discouraging customers or a certain class of customers on a temporary or permanent basis. Beeton and Benfield (2002) stress that the definition is not the opposite of marketing, but a fundamental aspect within marketing.

As cited by Beeton and Benfield (2002), Kotler and Levy (1971) describe three different types of demarketing:

- General Demarketing when a company wishes to reduce level of total demand;
- Selective Demarketing where demand from certain market segments is discouraged;
- Ostensible Demarketing in which marketing gives the appearance of wishing a reduction in demand as a result of scarcity, which in turn stimulates greater demand for the desired and increasingly scarce product.

2.10.1.1 Demarketing in a tourism context

Demarketing, with regard to tourism, was first discussed in the late 1980's where Clements (1989) states that while markets may or may not lend themselves to segmentation, it is clear in tourism marketing that market sub-groups are not equally profitable. This is when a demarketing policy has an active role to play in the planning process. Beeton (2003) advises that consciously increasing demand, revenue and visitor numbers through marketing may result in the loss of the tourism industry's nature-based foundation. Instead, by including demarketing in the marketing mix, a destination may attract more environmentally aware visitors and select specific markets, thereby enforcing two of the three types of demarketing suggested by Kotler and Levy in 1971.

Groff (1998), cited by Wearing *et al.* (2007), names three circumstances where demarketing strategies may be used. The first is where there are temporary shortages of the product, either due to lack of supply or underestimation of demand. The second is when a resource's popularity is threatening the quality of the visitor experience. Finally, demarketing may be utilised when there are issues of conflicting use such as visitor safety and uses demanded by the market.

2.11 Conclusion

According to Jamrozy (2007), tourism management has adopted the concept of sustainability but marketing is still based on the classic economic paradigm in which profit is the goal. The author advises that a sustainable marketing philosophy needs to incorporate societal, consumer and environmental perspectives, as illustrated in Figure 2.1. The model represents three dimensions, namely sustainability, economic viability, social equity and environmental protection. A focus on just one dimension, such as marketing under the economic paradigm, is insufficient, whereas a sustainable marketing approach integrates the three dimensions, but not necessarily in equal measures.

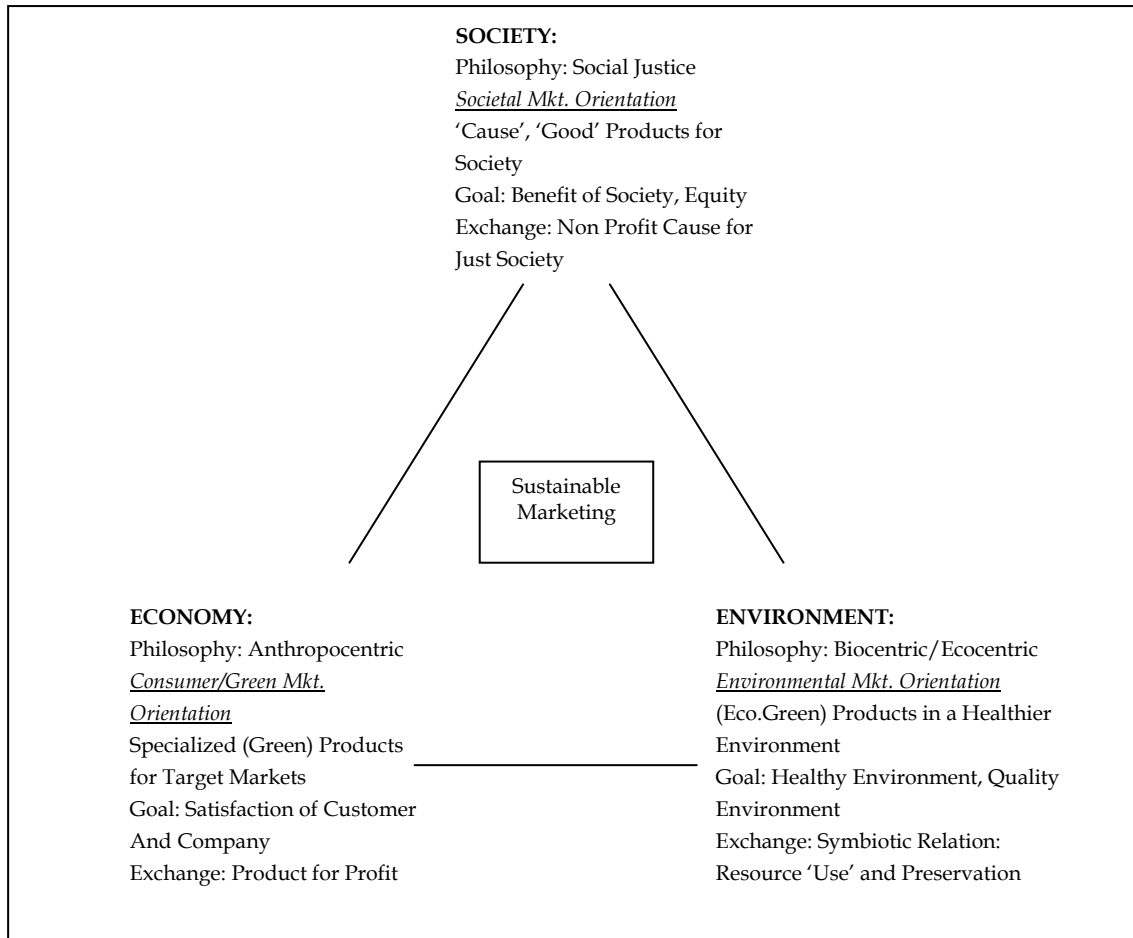


Figure 2.1: Sustainable Marketing Model

Source: Adapted from Jamrozy (2007, p. 124)

The CTC (2001) also advises against omitting any dimensions and recommends that instead of conducting no marketing at all, the right markets should be selected and educated and the appropriate limits enforced to position effectively.

Referring to British heritage attractions, Middleton (1989) suggests that a greater professionalism in marketing is required. The author states that commitment to market research is essential to monitor changes in visitor behaviour and expectations, as is updating and enhancing the product. The issues identified by the author in 1989 remain relevant today.

The ETC and WTO (2005) recommends that visitor management should be an integral part of the policy for sites as it affects various issues such as traffic control, parking, signage and marketing. When the flow of tourists is already greater and at

times out of balance, stronger measures need to be taken, such as increasing the costs of the visit, restricting traffic, pre-booking, encouraging visitors to visit alternative attractions in the area or stimulating visitors to come in low season periods. Furthermore, sites could think about the kind of tourists they want to attract (in as far as they can influence this). For example, day-trippers with a relatively low spend per visit, overnight visitors with a relatively high spend and individual or group tourists. In other words sites need to develop a clear strategy regarding how they want to develop tourism especially when it entails cultural heritage which is often irreplaceable.

Beeton (2003) suggests some demarketing tools that can be incorporated into the marketing of attractions in combination with visitor management. These include:

- Educating potential visitors with marketing and promotional literature
- Encouraging specific desirable markets while discouraging undesirable ones
- Publicising alternative sites
- Limiting permitted activities either seasonally or entirely
- Making access to fragile areas more difficult while simultaneously promoting less fragile areas

Moscardo (1996) claims that if the interpretation at built heritage sites is effective and creates what the author terms mindful visitors, then the management and sustainability of the sites can be improved. According to NWHO (1999), carefully designed interpretative programs can influence the distribution of visitors at a site. Mindful visitors, in turn, have a greater appreciation and understating of a site, know the consequences of their actions and how to act in ways that lessen negative impacts.

Wearing *et al.* (2007) advise that conservation messages should guide marketing strategies of heritage sites and that marketing activities should identify appropriate markets only. The authors also recommend demarketing activities in cases of excess demand, lack of supply or conflicting use.

Chapter 3

METHODOLOGY

3.1 Introduction

A review of published literature identifies numerous definitions of research. Wright and Crimp (2000, p.3) put forward the Market Research Society's definition:

'Research is the collection and analysis of data from a sample of individuals or organisations relating to their characteristics, behaviour, attitudes, opinions or possessions. It includes all forms of marketing and social research such as consumer and industrial surveys, psychological investigations, observational and panel studies'.

3.2 Research objectives

The overall purpose of this study is to identify the role that marketing can play in heritage attraction visitor management to help preserve cultural resources and examine the extent to which marketing is used in Irish heritage attractions. Specifically, the objectives are as follows.

1. To determine the extent to which tourism positively contributes to the sustainability of Irish heritage attractions.
2. To investigate the extent to which visitors impact negatively on the sustainability of Irish heritage attractions.
3. To clarify the prevalence of capacity restrictions at Irish heritage attractions and the subsequent implications for marketing.
4. To explore the usage of market research, segmentation and targeting at heritage attractions in Ireland.
5. To determine the extent to which elements of the marketing mix assist preservation of heritage attractions in Ireland and the associated implications for authenticity.
6. To investigate the use of demarketing as a visitor management tool, either intentionally or unintentionally, by the individual attractions and/or the representative bodies.

3.3 Research philosophy

The research philosophy adopted contains assumptions about how the researcher views the world (Saunders *et al.*, 2007). The most common research philosophies in the literature are positivism and interpretivism.

Interpretivism, is more flexible and focuses on the meanings behind the research. Saunders *et al.*, (2007) note that it is argued that an interpretivist perspective is appropriate in business research, particularly in the field of marketing.

A positivist researcher will use highly structured methodology to facilitate replication (Gill and Johnson, 2002, cited by Saunders *et al.* 2007). A component of positivism is that the research is undertaken in a value-free way (Saunders *et al.*, 2007).

The choice of research philosophy depends on the nature of the research objectives. In this case, due to the uniqueness of each heritage attractions and their representative organisations, generalisation is difficult and flexibility in question style is important. Therefore, the research lends itself more to interpretivism rather than positivism.

3.4 Research design

The research undertaken may be classified as predominantly descriptive in nature, that is, research that describes something, usually market characteristics or functions (Malhotra, 1999). Phase one of the primary research, the survey, attempts to describe the vulnerability of Irish heritage attractions and the role of marketing in assisting visitor management through quantitative research. Descriptive research may be an extension of, or a forerunner to, exploratory research (Saunders *et al.*, 2007). In this case the researcher also explores marketing heritage sites through secondary data analysis and subsequently through qualitative research in phase two of the primary research, semi-structured interviews. The objective of exploratory research is to explore a problem or situation to provide insights and understanding (Malhotra, 1999). Saunders *et al.* (2007) note that an advantage of exploratory research is that it is flexible and adaptable to change. This flexibility assisted the exploratory nature of phase two of the research, the semi-structured interviews and allowed the researcher to probe with follow-up questions when necessary.

3.5 Data collection methods

Initial secondary qualitative data collection was followed by a mixed methods approach of sequential exploratory strategy (Creswell, 2003), consisting of quantitative (survey) and qualitative research techniques (semi-structured interviews).

Qualitative research collects and analyses data that cannot be meaningfully quantified in statistical form (Parasuraman *et al.*, 2004). It provides insights into and understanding of a problem (Malhotra, 1999). Methods include focus groups and interviews.

Quantitative research is characterised by structure and large representative samples (Parasuraman *et al.*, 2004). It seeks to quantify data and typically applies statistical analysis of some form (Malhotra, 1999). Methods include surveys and observation. Qualitative research may be used to improve the efficiency of quantitative research. According to Malhotra (1999), it is a sound principle of research to view both methods as complementary rather than in competition with each other.

The researcher undertook an extensive literature review to identify the secondary data available regarding marketing cultural resources in a tourism context. General tourism marketing literature which did not refer explicitly to cultural or heritage tourism was also consulted as many issues that are relevant for general tourist attractions apply to heritage attractions also. Information gathered from secondary sources was used to inform the design of the primary research.

Given the aims of this dissertation, the primary research for this work involved the completion of two phases, namely a survey and semi-structured interviews.

3.5.1 Phase one: Survey

In order to facilitate phase one of this research, the researcher compiled a list of heritage attractions in Ireland (see Appendix 1 for the list of attractions). Initially, contact was made with Fáilte Ireland, the national tourism development authority in Ireland to determine the organisations with responsibility for marketing Irelands most frequently visited heritage attractions. The organisations identified were Office of

Public Works (OPW), Houses Castles & Gardens of Ireland (HCGI) and Heritage Island. Two additional bodies were then recommended, namely, the National Trust (Northern Ireland) and the Northern Ireland Tourist Board (NITB). A brief synopsis of the nature of each of these organisations is outlined in Appendix 4. Lists of all attractions represented by each organisation were subsequently obtained, from which the researcher compiled an independent list of Irish heritage attractions.

A mixed mode survey (internet and postal) of all 224 heritage attractions on the compiled list was administered in May and June 2008. The mixed mode method was used in the anticipation that it would increase the response rate. Meckel, *et al.* (2005), propose that a mixed-mode survey is a good alternative to a paper only survey. In this study 107 out of 224 questionnaires were returned and from this, 100 could be used for analysis as the remainder were incomplete. According to Malhotra (1999), the response rate for mail surveys is typically less than 15 percent. The researcher achieved a significantly higher response rate of 44.6 percent which allowed for meaningful findings and analysis.

The questionnaire used in phase one was designed based on issues raised in the literature, (see Appendix 3 for a copy of the questionnaire). It was accompanied by a covering letter on Letterkenny Institute of Technology headed paper (see Appendix 2 for a copy of the covering letter) and a stamped addressed return envelope to encourage a reply. The letter explained the purpose of the survey and provided assurances about confidentiality. Following the guidelines of Dillman (2000), the researcher offered respondents a copy of the study findings as an incentive to participate. A deadline for completion was not stipulated because, as described by Hoinville and Jowell (1977), rather than replying immediately, some recipients may wait for the deadline, or recipients that missed the deadline might discard the questionnaire instead of completing it.

According to Saunders *et al.* (2003), although surveys may be used as the only data collection method, it is usually better to link them with other methods. Hence, in this case, the survey of individual heritage attractions was followed by semi-structured interviews with the organisations responsible for marketing the attractions.

3.5.2 Phase two: Semi-structured interviews

An interview is a purposeful discussion between two or more people (Kahn and Cannell 1957, cited by Saunders *et al.* 2007) and can be an effective means of obtaining reliable data that is relevant to the research objectives (Saunders *et al.*, 2003). Interviews may be structured, unstructured or semi-structured. Structured interviews use questionnaires based on a standardised set of questions (Saunders *et al.*, 2003). On the other hand, unstructured interviews, also known as in-depth interviews, are informal and the interviewer does not have a predetermined list of questions (Saunders *et al.*, 2003). In this case, given the nature of the representative organisations, semi-structured interviews were deemed to be the most suitable method of obtaining qualitative information to allow the researcher to cover a list of themes which may vary from interview to interview (Saunders *et al.*, 2003). A theme sheet was used as a guide for the interviewer and allowed for flexibility in questions.

Phase two of this research involved six semi-structured interviews with marketing personnel from each of the six representative organisations. Four face-to-face interviews and two telephone interviews were undertaken in June and July 2008, (see Appendix 5 for interview log). These semi-structured interviews were non-standardised with the researcher focusing on a list of themes and questions, allowing variation in terms of the order and type of questions asked depending on the flow of the discussion. According to Saunders *et al.* (2003), in order to control bias and produce reliable data for analysis, a full record of an interview needs to be created soon after its occurrence. Notes were therefore taken and interviews were recorded to ensure accuracy (see Appendix 7 for transcripts). The interviewees from all six of the representative bodies were agreeable to participation in the study. By exploring issues raised in the literature and survey findings, meaningful and substantial qualitative data, to support the predominantly quantitative data gathered in the survey, was obtained.

3.6 Measurement Techniques

Phase one of the research, the survey, necessitated the design of a questionnaire. The first section consisted of general issues and category questions such as the name of the attraction and ownership details. The next section addressed the impact of visitor on

the sites, visitor restrictions that are in place and the role of marketing in assisting visitor management. The researcher's familiarity with the subject area allowed for the use of multiple choice questions and rank-order rating scales. A mix of multiple choice questions and rank-order rating scales as well as dichotomous questions were then used to help explore specific marketing areas such as price, promotion, packaging, responsibility for marketing and market research. Where dichotomous questions, were used, respondents were asked to explain their answer. The areas of site preservation, demarketing, authenticity and visitor impact were explored using mainly open ended questions. These were placed near the end of the questionnaire and it was anticipated that respondents would have enough interest in the study and provide additional information.

The themes raised in the survey then drove the structure of the theme sheet used to guide, phase two of the research (see Appendix 6). This represented six semi-structured interviews with marketing personnel in the organisations in Ireland responsible for marketing heritage attractions.

3.7 Sampling

The research population in the study included all Irish heritage attractions registered with the primary representative organisations, The National Trust, NITB, Fáilte Ireland, OPW, HCGI and Heritage Island. As the researcher compiled a mailing list of all 224 heritage attractions represented by these organisations sampling was not required. This represents a census as according to Saunders *et al.* (2003), the researcher has collected and analysed from every possible case or group.

3.8 Data analysis

Analysis of the data gathered from the questionnaires involved the classification of completed questionnaires, by ownership category and all responses were checked. In some cases, respondents did not answer all questions on the questionnaire, for example, question number 10 and 11 did not apply to respondents from heritage attractions with free admission. Data collected from the survey was analysed using Excel software which allowed the completion of both simple and cross tabulation.

The quantitative findings are presented mainly in charts and tables. Open-ended questions leading to unstructured answers are illustrated in narrative form and direct quotations included where possible. The results of the semi-structured interviews were documented, summarised and analysed in terms of the themes explored during each interview.

3.9 Conclusion

This research was conducted to explore the role that marketing can play alongside visitor management to help preserve heritage attractions and to explore the extent to which marketing is used as a preservation tool in Irish heritage attractions. It represents a predominately descriptive research design with an element of exploratory research. The research process involved a survey of heritage attractions in Ireland and the completion of semi-structured interviews with their representative bodies. The findings of the survey and semi-structured interviews are discussed and analysed in Chapter 4.

Chapter 4

FINDINGS AND ANALYSIS

4.1 Introduction

Chapter 4 presents the findings and analysis of the two data collection methods used in the research, the postal survey and the semi-structured interviews. Phase one of the research represents completed questionnaires from 100 Irish heritage attractions and phase two analyses six semi-structured interviews with the organisations that market the attractions.

4.2 Phase one: Survey

4.2.1 Demographic, ownership and admission details

The demographic details of survey respondents indicate that the highest number of respondents are from County Dublin, with the remainder geographically dispersed throughout Ireland. In terms of ownership, Figure 4.1 indicates that more than half are state owned, almost one third are privately owned and the remainder are owned by charities or trusts. In relation to admission charges, 28 percent of the attractions are free to the public and the remaining 72 percent charge an entrance fee. Demographic details of respondents are included in Appendix 8.

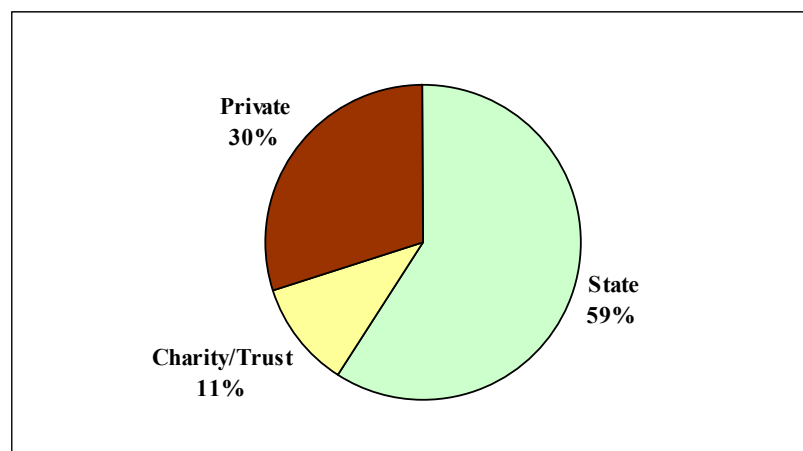


Figure 4.1: Ownership of heritage attractions

4.2.2 Effect of tourism on the preservation of heritage attractions

Respondents were asked if they considered tourism to have a positive or negative effect on the preservation of heritage attractions. The majority (70 percent) believe that it has a positive effect and 24 percent are of the opinion that it has no effect at all. A small minority (six percent) consider tourism to have a negative effect on the preservation of heritage attractions. The findings are summarised in Figure 4.2.

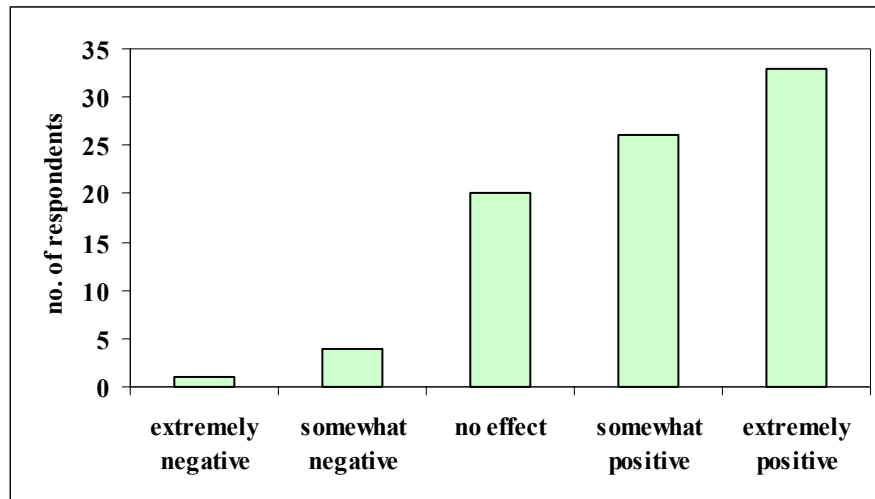


Figure 4.2: Tourism’s effect on the preservation of heritage attractions

A selection of comments from respondents is included in Appendix 8. The following quote encapsulates many of the points made:

‘Managed tourism allows for the visitor centre to be developed and maintained and significant visitor volumes restricted to only areas where visitor management is in place. The tourism dividend finances the preservation and education measures.’

Further to this, two thirds of respondents believe that there is no conflict between preserving heritage attractions and increasing numbers of visitors, (see Table 4.1).

Table 4.1: Conflict between conservation and tourism

YES	NO
33.3%	66.7%

A number of explanations were given by respondents in support of both viewpoints, (see Appendix 8, for supplementary information). The disparity of responses can be summarised by one respondent's comment:

‘Access and preservation is a balancing issue. Buildings and collections experience wear and tear but it is important that they are seen and used.’

Notably, although one third of survey respondents consider there to be conflict between preserving a heritage site and increasing visitor numbers, an extremely small number (six percent) regard the overall impact of tourism as negative. The general consensus is that managed tourism is important for generating interest and revenue, thus enabling the preservation of such sites.

4.2.3 The extent to which visitors impact negatively on heritage attractions

Respondents ranked wear and tear and littering as the main problems for heritage attractions, regardless of visitor numbers, (see Figure 4.3). The variations in responses depending on peak season visitor numbers is detailed in Appendix 8. While queues are deemed more serious in attractions with more than 10,000 visitors per month in peak season, excessive visitor numbers is not, (see Figure 4.4). It is notable that there is not a correlation between these two issues, implying that such sites have the capacity to accommodate the volumes of visitors they experience, but may be unable to facilitate the smooth flow of visitors.

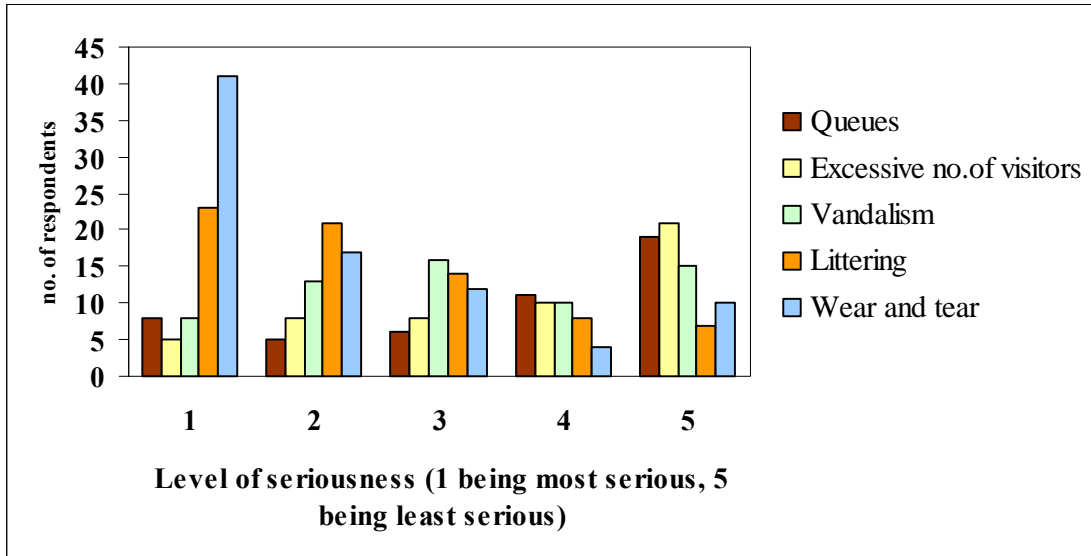


Figure 4.3: Negative impacts of visitors

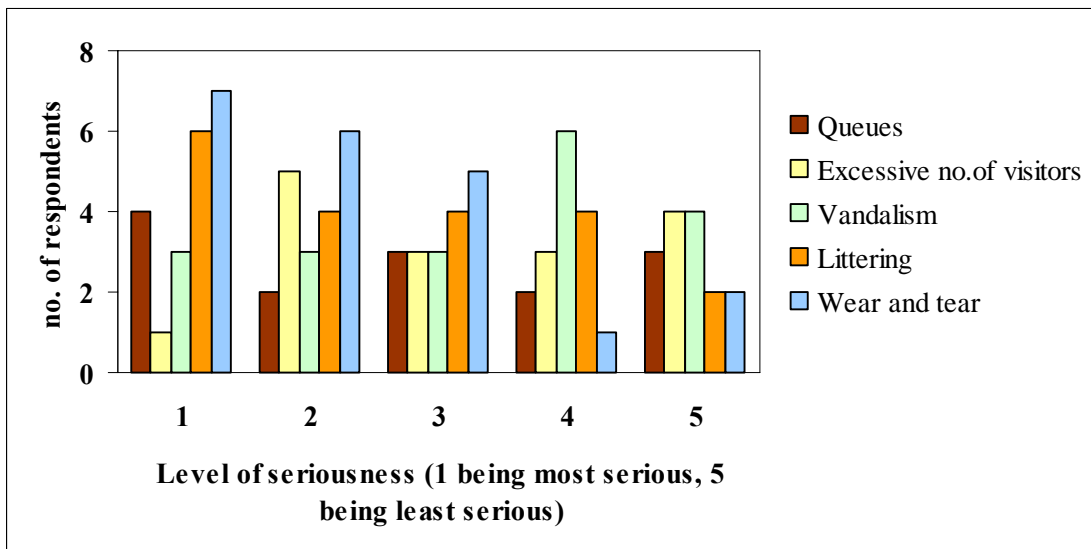


Figure 4.4: Negative impacts of visitors at sites with >10,000 visitors per month in peak season

4.2.4 Visitor management

State owned heritage attractions use a variety of visitor management tools throughout the year. The majority of charity/trust owned heritage attractions have traffic and parking restrictions and most privately owned attractions appear to use variations in admission fees as a visitor management tool. During peak periods pre-booking requirements are enforced by the majority of respondents from each ownership category. Detailed findings are presented in Table 4.2.

Table 4.2: Visitor management tools imposed

ALWAYS							
Restrictions →	Variations in admission fees	Traffic/parking restrictions	Pre-booking requirements	Restricted activities	Access to fragile areas discouraged	Promotion of less fragile areas	Encouragement to come in low season periods
Ownership ↓							
State Owned	39.6%	43.4%	43.4%	37.7%	43.4%	15.1%	26.4%
Charity/Trust Owned	30%	50%	20%	10%	30%	10%	30%
Privately owned	54.5%	4.5%	31.8%	9.1%	22.7%	0%	27.3%
DURING PEAK PERIODS ONLY							
State Owned	1.9%	18.9%	30.2%	11.3%	5.7%	0%	3.8%
Charity/Trust Owned	20%	20%	40%	10%	20%	0%	0%
Privately owned	4.5%	13.6%	27.7%	9.1%	4.5%	0%	0%

When prompted further, respondents provided details of incentives offered to encourage access to less fragile areas. A selection of information provided is presented in Table 4.3.

Table 4.3: Incentives offered to encourage access to less fragile areas

AREA	INCENTIVES
Designated pathways	Shown and directed by reception personnel
House and gallery	Tour
The undercroft	Lower price
Areas of gardens looking their best at different seasons	Information at ticket desk

4.2.5 Capacity restrictions' influence on marketing

According to the literature, marketing does not always deal with an unlimited supply of product (Beeton and Benfield, 2002). In cases of product shortages or scarcity, such as limited capacity, marketers must respond accordingly. As can be seen in Table 4.4, marketing activities are impeded on by capacity restrictions for approximately one fifth of respondents.

Table 4.4: Capacity restrictions' influence on marketing

YES	NO
23.8%	76.2%

However, capacity constraints may be an issue for a greater percentage but impacting on management rather than marketing. The findings presented in Figure 4.5 indicate that apart from the respondents who suggested that there are no capacity or visitor volume issues, the most common response was that management activity, rather than marketing, is important for reducing the negative impacts of visitors. Educating visitors and influencing routing throughout the attractions was ranked secondary, suggesting that when there are capacity constraints, sites turn to on-site visitor management before marketing. The variation in responses depending on ownership is presented in Appendix 8.

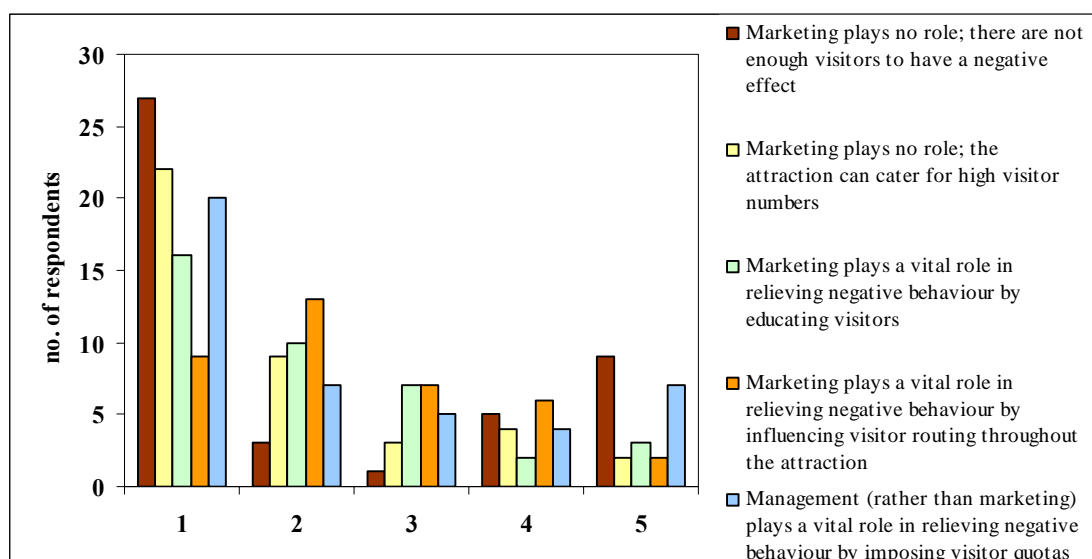


Figure 4.5: Role of marketing in visitor management

The survey results also indicate variations in how marketing is carried out at heritage attractions, depending on ownership. The majority of respondents from state owned heritage attractions indicated that marketing is carried out by a representative organisation and not by the individual sites. The majority of respondents from charity/trust owned heritage attractions state that marketing is guided by a marketing plan. Privately owned heritage attractions mainly conduct marketing on an unplanned basis when deemed necessary. Detailed findings are presented in Table 4.5, with the highest frequency per ownership category highlighted in bold.

Table 4.5: Conducting marketing

STATEMENT	OWNERSHIP		
	STATE	CHARITY/ TRUST	PRIVATE
Marketing is carried out by a representative organisation	43.3%	9.1%	22.3%
Marketing is guided by a marketing plan	25.0%	45.4%	29.6%
Marketing is guided by a visitor management plan	5.0%	27.3%	7.4%
Marketing is carried out on an unplanned basis when deemed necessary	16.6%	9.1%	40.7%
The attraction does not conduct any marketing	10.1%	9.1%	0.0%

4.2.6 Visitor research

The majority of respondents indicated that visitor research is conducted less than twice per year or not at all. Detailed findings are presented in Table 4.6, with the highest frequency per ownership category highlighted in bold.

Table 4.6: Frequency of visitor research

FREQUENCY OF RESEARCH	TOTAL	OWNERSHIP		
		STATE	CHARITY/ TRUST	PRIVATE
< 2 times per year	37%	36.2%	18.2%	42.9%
3-4 times per year	9%	8.6%	18.2%	7.1%
5-6 times per year	3%	1.8%	9%	3.6%
7-8 times per year	2%	0%	0%	3.6%
9-10 times per year	0%	0%	0%	0%
> 10 times per year	11%	10.3%	18.2%	10.7%
Never	38%	43.1%	36.4%	32.1%

The research concentrates on numerous areas and as indicated in Figure 4.6, visitor satisfaction is the main area of focus. While almost half of respondents indicated that their research focuses on the origin of visitors, it is noted that 17 of these respondents did not provide details of the origin of visitors when asked in the questionnaire (Question 5). These respondents indicated the absence of a visitor tracking system which would suggest that this information is either confidential or collected, but not analysed.

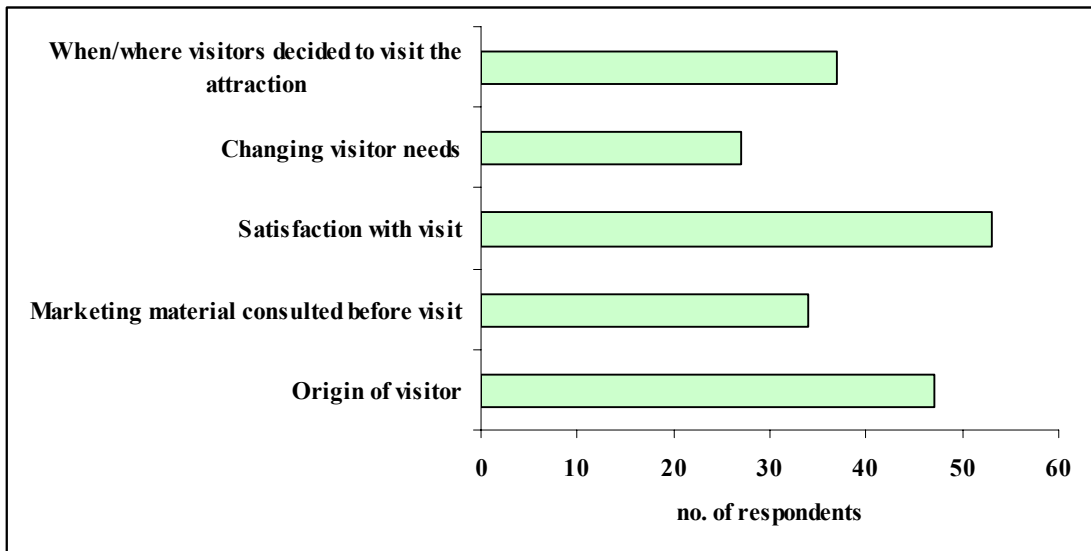


Figure 4.6: Focus of visitor research

4.2.7 Segmentation

Based on the visitor classifications listed by Greffe (2004), tour groups was the visitor type deemed most preferable by respondents. However, one quarter of respondents did not choose from the options provided and emphasised that there is no preferred visitor type. The findings are presented in Figure 4.7. The variation in responses depending on ownership is detailed in Appendix 8.

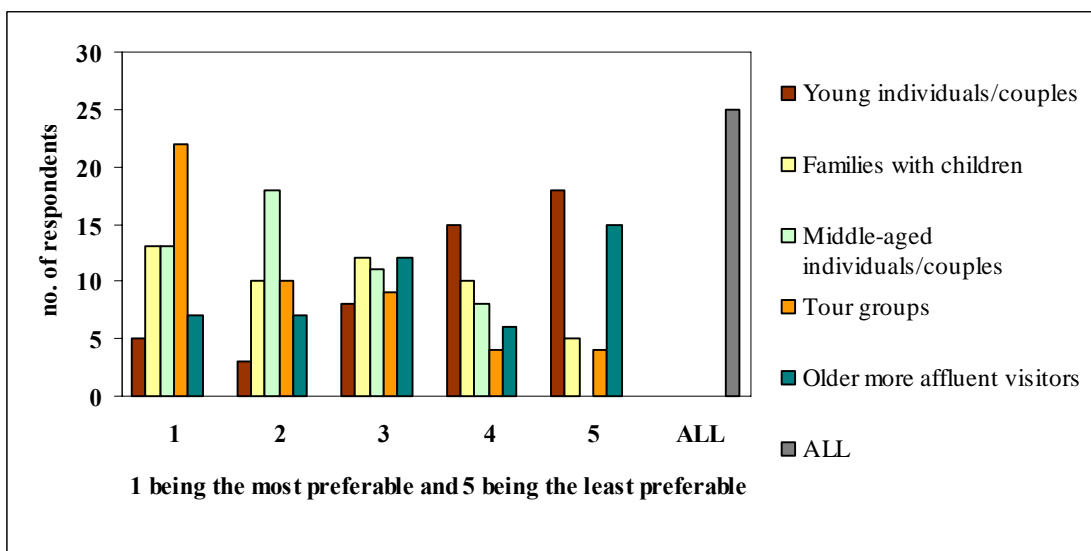


Figure 4.7: Preferred visitor types

Further to this, the majority of respondents from all ownership categories stated that no customers are considered undesirable or unprofitable (see Table 4.7). However, some respondents noted unsupervised children, teenagers and language students as potentially problematic.

Table 4.7: Undesirable, potentially unprofitable visitors

OWNERSHIP	YES	NO
State	12.7%	87.3%
Charity/Trust	20%	80%
Private	19.2%	80.8%

4.2.7.1 Targeting

The most popular promotional tools used at the heritage attractions are web presence, brochures, signage and print media advertising. Television is the least utilised promotional tool, (see Figure 4.8).

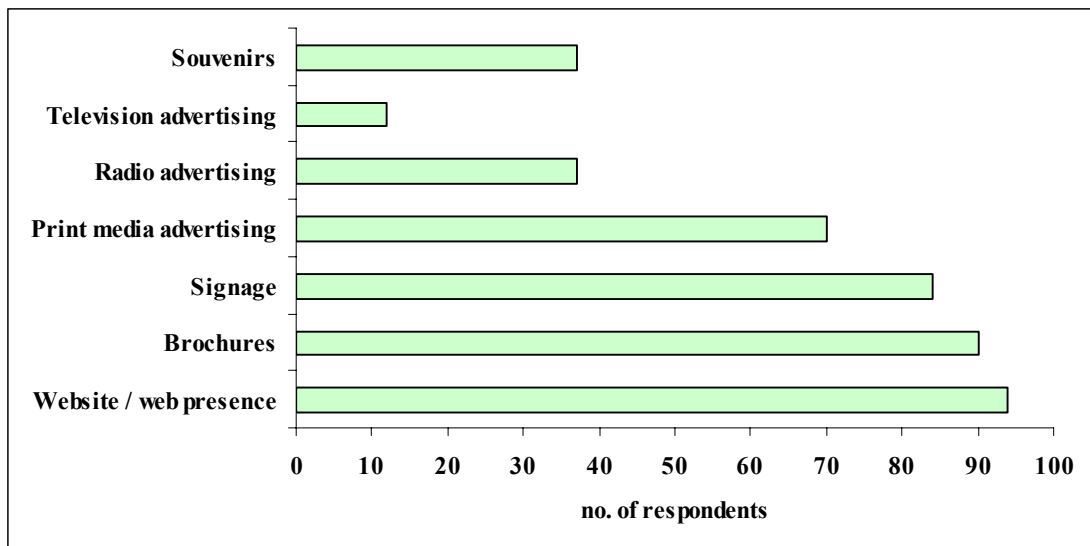


Figure 4.8: Promotional tools used

As can be seen in Figure 4.9, the main purpose of web presence, the most popular promotional tool, is to inform visitors of what is available at the attraction. It appears to be under-utilised as a visitor management tool, with only one fifth of respondents

using it for pre-bookings and educating visitors about desirable behaviour at the site. In addition, respondents reported using web presence to obtain visitor feedback and to provide basic information such as opening times, upcoming events and directions.

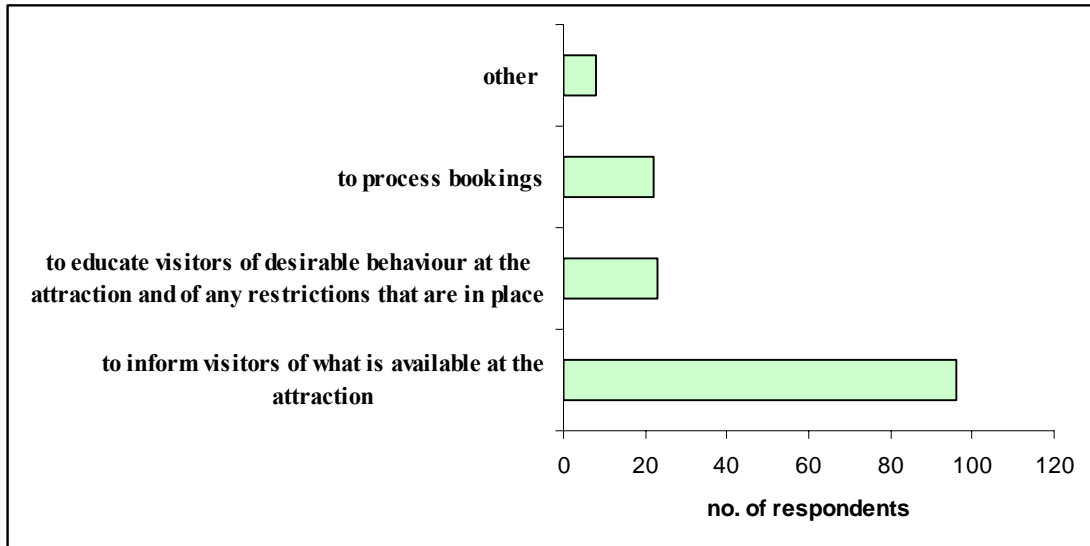


Figure 4.9: Purpose of web presence

4.2.8 Admission price

The admission price at heritage attractions is usually set by a representative organisation or by keeping in line with what similar sites charge, (see Figure 4.10). The variation in responses depending on ownership is detailed in Appendix 8. These findings disagree with Greffe (2004), whereby the author claims that the entry price is usually set by dividing costs by the number of visitors expected.

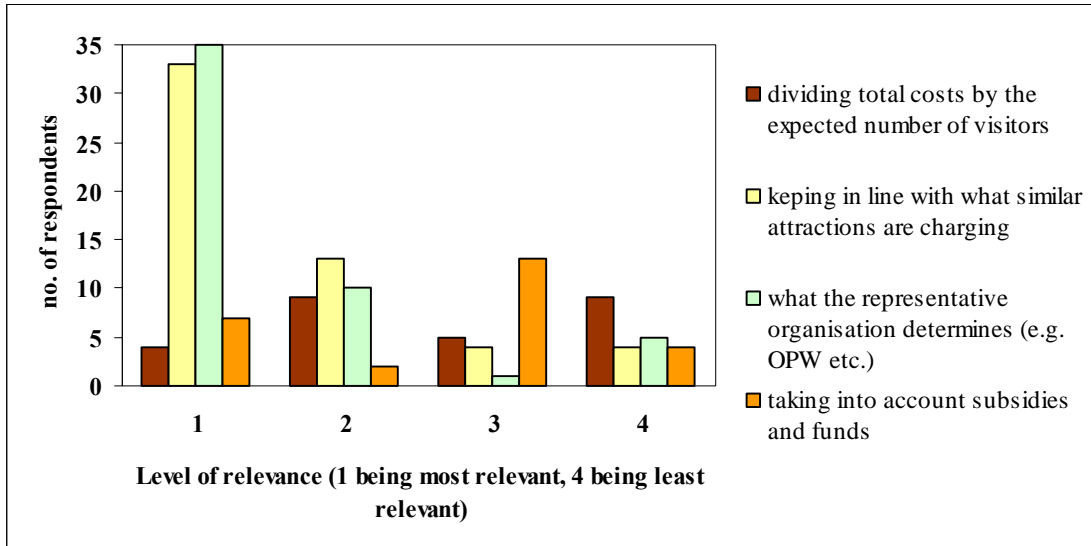


Figure 4.10: Method of setting admission price

The majority of respondents indicated that admission fees are set at the current rate(s) to cover running and maintenance costs and attract more visitors. Making a profit to reinvest in the attraction or for commercial purposes was not deemed to be priority. The literature recommends that if a site gets damaged by tourism, those responsible for the damage should pay for the prevention or repair (Fyall and Garrod, 1998). However, it is apparent from the research that income from admission fees does not result in surplus revenue after running and maintenance costs have been covered. Therefore the funding required for the long-term sustainability of the site must be generated by other means. Detailed findings are presented in Figure 4.11. The variation in responses depending on ownership is detailed in Appendix 8.

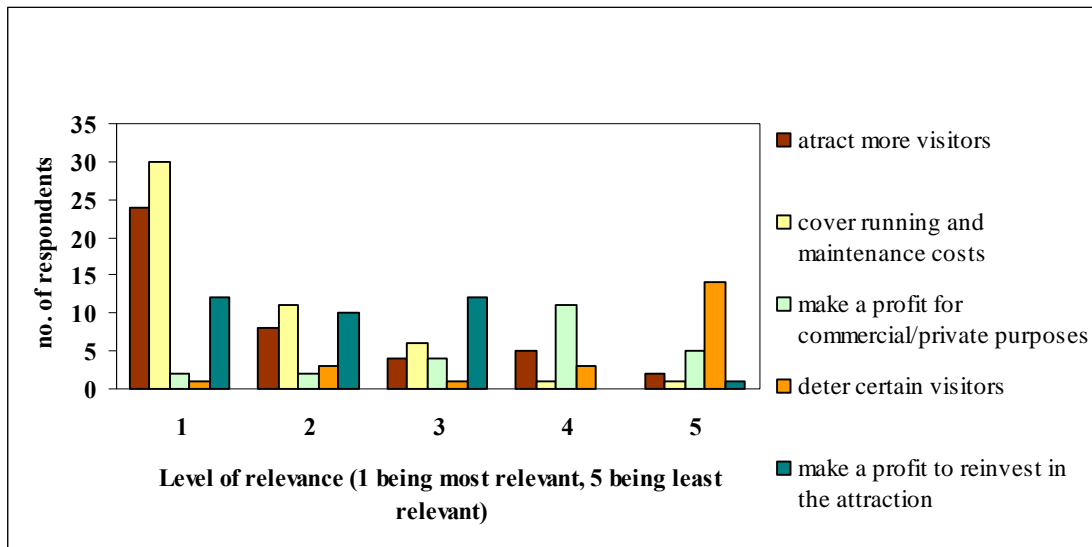


Figure 4.11: Purpose of admission price

4.2.9 Packaging and interpretation

According to the literature, marketing in a heritage context involves repackaging the resource to make it more appealing and accessible to the mass market (Apostolakis, 2003). Three quarters of respondents gave details of modifications to the original heritage resource. These included:

- Disabled access
- Cafes and restaurants
- Exhibitions and displays
- Barriers to protect displays and visitors
- Live performances
- Interpretative centres

According to MacCannell (1979), when packaging alters the nature of the resource, the authenticity is affected. However, as can be seen from Figure 4.12, the majority of respondents who had made modifications only considered these to have a positive effect on authenticity or no effect at all.

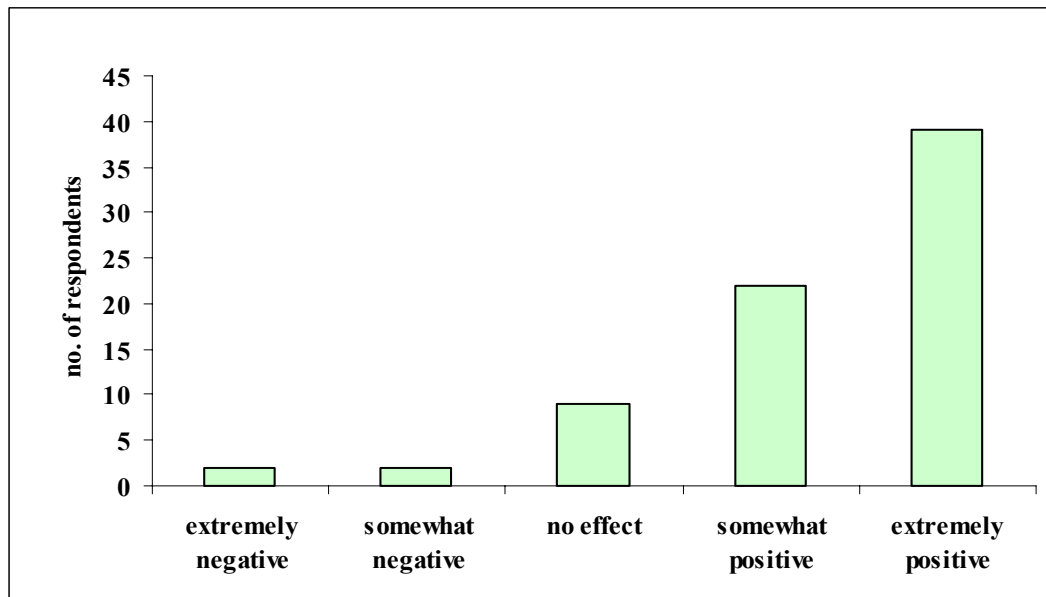


Figure 4.12: Management’s perception of the effect of modifications on authenticity

Making heritage sites understandable and meaningful to visitors is known as heritage interpretation (Prentice *et al.*, 1998). Literature is the most common form of interpretation used at the heritage attractions, followed closely by signage and tour guides, (see Figure 4.13). It is suggested that tour guides have an emotional impact on visitors (Prentice *et al.*, 1998), and in this research, their importance is clearly evident with over 80 percent of respondents employing guides.

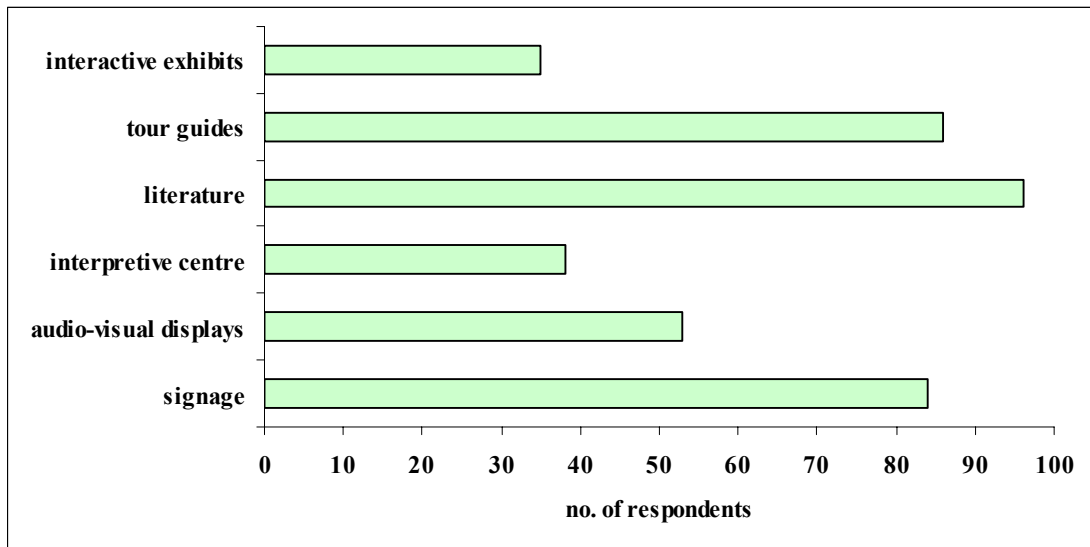


Figure 4.13: Interpretation used

As outlined in Table 4.8, educating visitors about the history of the attraction is the purpose of interpretation for almost all respondents. While it is regarded as successful by 77.4 percent of these, it is significant that the other 22.6 percent consider interpretation to be unsuccessful in achieving its primary role. Less than half of respondents use interpretation to encourage visitors to act in ways that lessen negative impacts on the attraction and of these, only two thirds consider it to be successful at achieving this. This may relate to wear and tear and littering being the most prevalent negative impacts of visitors and suggests that there is a role for marketing in visitor management which isn't fully realised. Likewise, as previously commented on, queues become a more serious issue as visitors numbers increase although overall site capacity is adequate. The findings imply that the interpretative element of the marketing mix is not used to support visitor management to the extent that it could be, as only half of respondents use it to influence the distribution and direction of visitors.

Table 4.8: Purpose and success of interpretation

The interpretation focuses on:	n	Very unsuccessful	Somewhat unsuccessful	Neither successful or unsuccessful	Somewhat successful	Very successful
educating visitors about the history of the attraction	84	11.9%	8.3%	2.4%	21.4%	56%
encouraging visitors to act in ways that lessen negative impacts on the attraction	46	6.5%	6.5%	21.7%	28.2%	37.1%
influencing the distribution and direction of visitors	50	6%	10%	14%	18%	52%

4.2.10 Demarketing

The literature recommends the inclusion of demarketing in the marketing mix to attract environmentally conscious visitors (Beeton, 2003). Respondents were given an explanation of demarketing and asked if they use/used it. Only four percent claimed to. The examples given by respondents include withdrawing from children's attractions books and turning visitors away when maximum capacity is reached. Notably, many survey respondents that restricted activities at the sites, discouraged access to fragile areas and promoted less fragile areas, (Table 4.2) stated that they did not use demarketing. Therefore, it appears that while visitor management is enforced, it is not supported by demarketing. However, the difference between the two is not so much in the activity itself but the stage at which it is applied (Beeton, 2003). Demarketing would facilitate a proactive approach, whereas the reality is that sites are reactive in imposing visitor management.

4.3 Phase two: Semi-structured interviews

4.3.1 Effect of tourism on the preservation of heritage attractions

In agreement with the survey findings, the consensus from the interviewees was that visitors make a positive contribution to the preservation of heritage attractions and not just in terms of revenue generation. According to OPW, visits to sites with no entrance fee generate positive word of mouth, which increases the knowledge and importance of the sites. Revenue generated at sites with entrance fees contributes to general maintenance costs. One interviewee contends that:

‘In both cases visitors help keep information in circulation and pass on knowledge that would otherwise get lost quite quickly.’

The importance of fee paying visitors was further highlighted by another interviewee:

‘Without getting the flow of visitors a lot of sites wouldn’t be able to stay open and would get worn down.’

4.3.2 The extent to which visitors impact negatively on heritage attractions

Interviewees noted the requirement to constantly adhere to health and safety regulations at the attractions, with the National Trust indicating a necessity to restrict visitor numbers at Carrick-a-Rede Rope Bridge (Figure 4.14) for this reason. OPW noted that there is always the risk of stones or artefacts going missing. According to one interviewee:

‘There are only a few places with extremely high visitor numbers, for example Skellig Michael and Newgrange, but they have the necessary controls in place to deal with it.’

Respondents were confident that with adequate systems in place, negative impacts from visitor numbers can be controlled.



Figure 4.14: Carrick-a-Rede Rope Bridge
(*Source:* www.discovernorthernireland.com)



Figure 4.15: Skellig Michael
(*Source:* www.sacredsites.com)

4.3.3 Visitor research

Despite the literature's emphasis of the importance of monitoring changes in visitor behaviour and expectations (Middleton, 1989), visitor research carried out by most of the representative organisations is somewhat minimal, each one commenting that it is difficult to conduct. According to Fáilte Ireland, exit surveys are completed when visitors are leaving Ireland, but only basic examination of their cultural experience is possible. Rather, Fáilte Ireland focuses on encouraging and supporting management at

individual sites to get customer feedback. The National Trust claims to constantly conduct market research that examines visitors' needs and wants.

4.3.4 Segmentation and targeting

The National Trust and Fáilte Ireland use behavioural segmentation to segment and target visitors. Individual sites have not reported such sophistication regarding segmentation and targeting. Following research at each of its properties, the National Trust identifies the segments that are attracted to each site and consciously targets them, (see Table 4.9).

'When we segment we can deliberately focus on the segments; segment and then engage'.

Table 4.9: National Trust visitor segments

SEGMENT	DESCRIPTION
Explorer families	Want an active and stimulating experience
Out and about	Sites are just a back drop for their day out
Grey matter	Slightly older people that want to learn
Young experience seekers	Mainly under 30's wanting to see awe-inspiring things
Kids first families	The priority for the parents is keeping the kids happy
Live life to the full'	Have a thirst for knowledge and quest for escapism
Home and family	Families interested in spending time together

Fáilte Ireland divides cultural tourists into three segments reflecting different levels of commitment to culture, (see Table 4.10). It targets the latter two with its communications, supporting the literature's claim that cultural tourism is not just an activity of the elite minority (Bedate *et al.*, 2004).

Table 4.10: Fáilte Ireland visitor segments

SEGMENT	DESCRIPTION
Motivated cultural tourists	Holiday is motivated by the cultural element. Interest may be specialist or general.
Inspired cultural tourists	Have a broad interest in culture and sightseeing.
Incidental cultural tourists	Typically have another reason for their trip and participate in cultural activities that are in keeping with their travel plans.

OPW sells heritage cards which allow free entrance to all places in their care for a year. However, there is no central database with purchasers' information or usage behaviour. The technology is not in place for such recording and therefore, OPW does not possess customer data that would enable target marketing.

4.3.5 The promotional promise and the visitors' on-site experience

Promotion serves to shape prior expectations of visitors so that on-site experiences meet expectations (Wearing *et al.*, 2007). In Ireland, there are variations in the level of control each representative organisation has over what is actually experienced on-site. Usually, attractions provide information to the representative bodies for their publications, so for the purely marketing organisations, Heritage Island and HCGI, this is their main connection between promotion and the on-site experience. Fáilte Ireland guides site management and provides trained staff. Likewise, NITB works closely with the Department of Employment and Learning to ensure that adequately trained people are employed in the tourism sector. The National Trust is very focused on promotional promises meeting on-site experiences and invests in staff training to ensure same. According to them:

‘All staff and volunteers attend training courses each year to ensure that customers receive the experience we promise.’

OPW selects the tour guides for its sites but provides limited training. They contend that those recruited have an interest in and good knowledge of history so little training is required. However, OPW acknowledges that different visitors to the same site may receive different information depending on the knowledge and personality of the tour guide.

4.3.6 Pricing

The literature suggests that increasing price can reduce demand (Beeton and Benfield, 2002). The National Trust charges lower prices at less popular sites and higher prices at more popular ones. Many of OPW's sites have free admission to encourage more visitors and they charge fees at more popular sites to regulate visitor numbers. Greffe

(2004) proposes that it is beneficial to lower the admission price on days when there are few visitors to encourage more people to visit and raise the price at busier periods. This was not supported by any of the representative organisations as it is deemed too difficult to administer. Many heritage attractions, do not have the technology in place to vary prices on a regular basis and they are usually revised annually. One interviewee explained:

‘Tour operators get pre-sold vouchers and packages in advance so if the price has changed when they come it is bad form. Sites would be better trying to manage visitors other ways.’

4.3.7 On-site interpretation used at heritage attractions

Fáilte Ireland remarked that interpretation is generally not for specialists, that is, the motivated cultural tourists. Instead, animation is added for the other two segments to inspire their interest. According to them:

‘It’s about changing the mindset of site management and getting them to think about who they are actually targeting and use the resources that they already have.’

In contrast to the writings of Moscardo (1996) the National Trust finds that traditional signage and guides are more effective than interactive exhibits. At many of its houses it has gardeners who take on the role of tour guides also. According to them:

‘We find that this brings a place more to life. And it came about as a result of research. Previously our gardeners would just lift their heads to say hello to visitors but when we learned that some visitors came and only went around the gardens and not actually inside the houses, our gardeners then became guides. People feel more connected when there is a guide. They get answers to their questions and they go away feeling satisfied.’

NITB believes that signage and interpretation are imperative but need to be done discretely. According to them:

‘Usually an unaltered building means nothing to a visitor but if there is a guide, a story or a theme at it, it completely changes that...when you’re trying to develop a story, a trail, there needs to be interpretation.’

Similar to Fáilte Ireland's targeting of inspired cultural tourists and incidental cultural tourists, NITB emphasised that the key is to find the balance between targeting the cultural tourist and the general tourist with no specific interest in heritage.

4.3.8 Demarketing

One of Fáilte Ireland's primary remits is to spread visitors around Ireland. It is currently involved in developing a number of themed heritage initiatives in different regions of the country, intended to relieve pressure from Dublin.

Likewise, NITB has five Signature Projects which spread visitors throughout Northern Ireland. For example, the Giant's Causeway and Antrim and Causeway Coast Area spreads visitors and relieves pressure on the Giant's Causeway. According to them:

'It also adds value for the visitor. It's a 'win win' situation for the Giant's Causeway and surrounding attractions and businesses if a managed flow is achieved.'



Figure 4.16: Giant's Causeway

(Source: www.reformationtours.com)

As OPW manages state owned heritage sites, it emphasised that it cannot be seen to discriminate. However, according to them:

‘That is why the admission fee is there - so that people just have to think twice about going.’

According to Heritage Island more popular sites manage visitors with simple efforts such as visitor routing.

‘They realise that putting visitor management in place actually has a positive effect on the visitors’ experience because they will say, ‘I wasn’t in a room with 50 people’. They won’t say, ‘I couldn’t get near the signs or the touch screens’.’

4.3.9 Pre-booking

Heritage Island revealed that only two of its members, Guinness Storehouse and Jameson Distillery have pre-booking systems. It estimated that 90 percent of visits to the Guinness Storehouse are booked online. Fáilte Ireland expressed its support for pre-booking:

‘We’re encouraging sites to set up online booking systems, where visitors have to book ahead of arrival. This would give sites a preview of how busy they will be on a given day and from a visitor management perspective they could arrange the necessary staff etc.’

4.3.10 Authenticity

The interviewees emphasised that it is through education and interpretation that the value of heritage sites can be appreciated by the general visitor, but according to them, management are cautious of losing the real heritage by making too many enhancements. One interviewee stated:

‘It’s finding a balance between their remits to maintain the authenticity of the product and marry that with getting the message out there.’

OPW highlighted that it would not be in their interest to re-enact something inaccurately. The National Trust commented that there is a balance to be struck:

‘You have to be careful not to end up with a Disneyland! There are times when conservation wins over tourism.’

4.4 Conclusion

The primary research reveals that tourism provides both the incentive and the revenue necessary to preserve heritage sites. Many of the sites would not get by on subsidies alone. In addition, negative impacts of visitors are not extreme. However, this is mostly as a result of surplus visitor capacity at the majority of sites. Marketing does not appear to be incorporated into the management plans of sites, and proactive visitor management measures such as pre-booking are not widely implemented. In general, the potential of technology is yet to be fully developed. Hesitation to engage in activities that affect may the site's authenticity is evident and this is where a balance between preservation and access is necessary. Hence, the role of marketing in conjunction with site management is imperative.

The representative organisations work to assist individual sites with planning, development and marketing of the heritage attractions. Their scale of operation and resources allow a stronger commitment to marketing. In addition, representative organisations endeavour to direct visitors to more impact-resilient sites, thereby unconsciously utilising demarketing.

The full conclusions along with recommendations are discussed in detail in Chapter 5.

Chapter 5

CONCLUSIONS AND RECOMMENDATIONS

5.1 Introduction

The importance of cultural resources for Ireland's tourism industry is widely acknowledged. This study has examined the reciprocal contribution of tourism for the sustainability of cultural resources and the role that marketing and demarketing can play in visitor management to support preservation. The secondary research identified the literature's recommendations on combining marketing with visitor management and the primary research examined the findings of the literature review in the context of Irish heritage attractions. Chapter 5 consolidates the main findings of the previous chapters and draws overall conclusions in the context of each of the research objectives.

5.2 The extent to which tourism positively contributes to the sustainability of Irish heritage attractions

Ireland's cultural resources are significant from both an economic and tourism perspective as highlighted in Fáilte Ireland's Environmental Action Plan 2007-2009. The findings of this research concur and emphasise the importance of cultural tourism in generating both interest and revenue thus enabling the preservation of heritage sites. However, managed tourism in this sector is crucial. A balance must be struck where the needs and expectations of visitors are met, but the preservation of the heritage attractions is not jeopardised by over-use.

5.3 The extent to which visitors impact negatively on the sustainability of Irish heritage attractions

The research revealed that wear and tear and littering are the extent of negative visitor impacts at Irish heritage attraction as either there are not enough visitors to have a negative effect or the attraction can cater for high volumes of visitors. It is well documented in the literature that it is not in the interest of cultural tourism to create excessive demand for cultural resources as this can cause negative impacts on both

the visitor experience and resource itself (McKercher *et al.*, 2004). However, visitors are also imperative for the sustainability of the resources and therefore prohibiting them completely is not advised. Instead, proactive measures such as influencing visitors' expectations through marketing and controlling their on-site conduct by visitor management can ensure that sustainability, protection and preservation are given priority at sites. Such measures are not intended to restrict the development of tourism since it generates revenue to fund running and maintenance costs. Instead, the solution is for marketing to assist visitor management by creating environmentally conscious visitors.

5.4 The prevalence of capacity restrictions at Irish heritage attractions and the subsequent implications for the marketing mix

An important consideration in marketing heritage is site capacity. Survey respondents reported issues such as queues and parking limitations and almost one quarter stated that capacity constraints have an impact on marketing activities. However, this may not be an accurate reflection of the number of sites with capacity constraints. Heritage sites with high visitor numbers appear to have a preference for visitor management controls such as imposing quotas rather than marketing or demarketing. For example, Skellig Michael plans to manage visitors by establishing a defined annual season for opening to visitors and maintaining a guide service. The incorporation of marketing is absent from its management plan, contrary to the literature's recommendation that marketing and visitor management be integrated (Beeton, 2003). The overall findings suggest that marketing, as a proactive management tool and component of CRM is not as developed as it could be.

5.5 The usage of market research, segmentation and targeting at heritage attractions in Ireland

It is well documented that ongoing research into the needs and expectations of visitors results in a more rewarding exchange transaction for both the visitor and the heritage attraction. Individual sites in the research have not reported strong commitment to regular market research, but those that do research their visitors potentially have a wide range of valuable information. The National Trust and Fáilte Ireland actively

segment and target their markets using behavioural segmentation. Understanding behaviours at heritage sites requires identifying the link between the person and the object or place (Poria *et al.*, 2006). This process could be enhanced by timely, accurate visitor information and feedback obtained at individual sites.

The scepticism among heritage practitioners regarding the usefulness of marketing as a whole noted in the literature (Guerin, 2000), is reiterated by the representative organisations. They report that management at heritage sites are cautious of marketing, as they consider their role as one of preserving heritage rather than making it accessible to the public. A balance needs to be struck between their responsibility to preserve the resource and encouraging tourism, thus generating interest and revenue.

5.6 The extent to which elements of the marketing mix assist preservation in heritage attractions in Ireland and the associated authenticity implications

5.6.1 Promotion

The most popular promotional tool at heritage attractions, web presence, appears to be underutilised as a visitor management tool, with only one fifth of respondents using it to process pre-bookings and to educate potential visitors about appropriate behaviour at the sites. Nevertheless, the role of promotion in marketing is to shape consumers' prior expectations so that actual experiences are satisfactory. Web presence fulfils this role with almost all respondents stating that it is used to inform visitors of what is available at the attractions. However, 43 percent of state owned heritage attractions indicated that marketing is carried out by a representative organisation. While Fáilte Ireland and NITB work to provide trained staff for attractions, such organisations have limited involvement with on-site experiences. Consequently, the potential for variance between promotional promises and on-site experiences is heightened at state owned heritage sites.

5.6.2 Price

Price is arguably the most basic visitor management tool available to heritage attraction management. It is not only an important means of covering running and

maintenance costs, but it has the potential to control visitor numbers during peak and off-peak periods, (Grefe, 2004). The latter was not supported by any of the representative organisations due to inadequate technology and difficulty in predicting quiet and busy periods. Instead, the findings appear to confirm the literature of Fyall and Garrod (1998) where admission prices only serve to cover the costs of opening to the public. In the current technological era, it is surprising that the combined benefits of pre-booking and flexible pricing are not utilised to a greater extent.

5.6.3 Packaging and interpretation

Marketing in a heritage context is directed at repackaging the initial product and making it understandable and meaningful to visitors is known as heritage interpretation (Apostolakis, 2003; Prentice *et al.*, 1998). The survey findings imply that interpretation is not realised to its full potential. Over 80 percent of respondents indicated that educating visitors about the history of the attraction was a purpose of interpretation, but of these, over 20 percent considered it unsuccessful. Interpretation also appears to be underdeveloped as a visitor management tool. More effective use of interpretation to influence visitor routing and encourage visitors to act in ways that lessen negative impacts on the attraction may reduce the extremity of wear and tear and littering at the sites.

5.6.3.1 Authenticity

Accurate interpretation can enhance the authenticity of a site but equally, inaccurate interpretation can have an adverse effect. As outlined in the literature, marketers provide only one version of events and there may be bias in what is recreated at heritage sites (Waite, 2000; McManus, 1997). However, the representative organisations emphasised that interpretation is imperative to communicate with non-specialist cultural tourists and if done discreetly, should not affect the authenticity of the site. They contend that it is not in anyone's interests to imply that something happened that did not. However, a form of interpretation that is more difficult to regulate is tour guides. Depending on their knowledge and personality, stories of events may be curtailed or exaggerated. Nevertheless, the researcher concludes that the importance of keeping knowledge in circulation which would otherwise get lost

quite quickly outweighs the risks of minor effects on the accuracy. McKercher *et al.* (2004) support this view and add another dimension by stating that visitors' desire to have an entertaining experience is greater than the pursuit of authenticity.

5.7 The use of demarketing as a visitor management tool

Demarketing is defined as an aspect of marketing that deals with discouraging customers or a certain class of customers on a temporary or permanent basis. The difference between demarketing and visitor management is not so much in the activity itself but the stage at which it is applied (Beeton, 2003). Three circumstances where it may be used are explained in the literature (Groff, 1998, cited by Wearing *et al.*, 2007). From the research, it can be seen that the most common of these in Ireland is when there are issues of conflicting use such as at Carrick-a-Rede Rope Bridge when visitors have to be controlled for safety reasons or when the resource's popularity is threatening the quality of the visitor experience, such as at Newgrange.

However, the term demarketing does not appear to be widely recognised among heritage site management or their representative organisations. It is possible that the prefix 'de' infuses a negative view and there is reluctance to be associated with such a term. It would appear that heritage attractions in Ireland view marketing in the commercial sense, whereby the task is to create as much demand as possible for a product or service. Instead, selective marketing and demarketing can be applied, enabling the targeting of profitable, environmentally conscious visitors. In turn, revenue can be increased without increasing visitor numbers significantly.

Finally, the primary research revealed that state owned and managed heritage sites cannot be seen to discriminate and are therefore reluctant to engage in behaviour that discourages visitors. The contention is that as the heritage sites and monuments are publicly owned, everyone has a right to visit them. The researcher debates that as the state is responsible for caring for the public's heritage on their behalf, if damage and decay result from too many visitors, this does not equate to being responsible.

5.8 Recommendations

There is a growing need for demarketing and sustainable marketing in the heritage tourism industry. It is recommended that such concepts be included in the wider marketing literature rather than mainly models based on scenarios of unlimited supply. Subsequently, the incorporation of visitor management at the visitors' decision-making stage through marketing may reduce the extremity of visitor management required when they arrive at the site

To begin with, those responsible for the sites need to be more aware of the benefits of sustainable marketing for preservation, so that marketing is not just seen as a means of generating visitor volumes for commercial purposes. Thereafter, it is recommended that conservation remits should guide marketing and promotion strategies, rather than forcing heritage stakeholders to adopt traditional commercial marketing.

Development of market research programmes by the representative organisations and enforced on-site by individual attractions, would give a direct insight into visitors' expectations and levels of satisfaction. This method would use fewer resources than if the representative organisations carried out research independently. Real time information would enable sites to predict busy and quiet periods, enabling them to staff accordingly and reduce queues and congestion. The resulting quality of visitors' experiences would justify charging a price high enough to generate the revenue required for marketing and sustainability.

Finally, it is recommended that interpretation is not just developed by the heritage specialists at the site as their explanation may not be understood by non-specialists. The involvement of various interests in the interpretation development would ensure that the remits of the heritage practitioners, marketers and management are met while achieving the balance between communicating to the cultural tourist and the general tourist with no specific interest in heritage.

In essence, marketing is a vital component of the communication process and helps to make heritage accessible and meaningful to more than just the specialist cultural tourist. The main issues for heritage attractions are satisfying visitors' expectations and managing their impacts without compromising the authenticity of the site.

However, if implemented correctly, exposure and education facilitates the appreciation of heritage resulting in tourism having a positive, rather than negative, impact on heritage sites.

A combined commitment to qualitative and quantitative visitor research by the individual heritage sites could provide information to the representative organisations to facilitate target marketing aimed at sites capable of accommodating high visitor volumes. This requires a change of mindset among heritage practitioners regarding the uses of marketing in general, which is achievable through a series of combined efforts such as education, study of best practice, assistance and feedback.

5.9 Strengths and limitations of the research

The main strength of this dissertation lies in the achievement of all six objectives. Other strengths include the compilation of a list of heritage attractions in Ireland, which did not exist and the inclusion of the views of marketing personnel from each of the six main representative organisations. This research makes a worthwhile contribution to the development of thinking and practice around the marketing of cultural resources.

However, it is important to consider the strengths of this research in the context of its limitations. Firstly, recent literature relating to heritage marketing is not widely available and therefore many sources consulted are more than 10 years old. This however, highlights an additional strength of this research, as a similar study does not exist.

The absence of a comprehensive list of all heritage attractions in Ireland was unanticipated. The list compiled by the researcher consists of all heritage attractions represented by the main organisations as advised by Fáilte Ireland. However, as heritage attractions are not obliged to be registered with an organisation, some are omitted. In order to compensate for this limitation, all attractions on the researcher's list were surveyed.

Despite the high response rate achieved (44.6 percent), there are limitations to the postal survey research method. There is no guarantee that the intended respondent is the person that actually completes the questionnaire and the researcher is unable to clarify questions for the respondent or probe for more information (Domegan and Fleming, 2007). The researcher attempted to overcome this by addressing the questionnaire to the appropriate person where possible. In addition, due to the wide range of questions asked and the individuality of each heritage attraction, not every question was applicable to each respondent. These shortcomings were among the basis for the semi-structured interviews with the representative organisations, thus facilitating further exploration of the issues raised in the survey.

In addition, time constraints influenced the primary research tools utilised and specific case studies of heritage attractions or research of visitors' perceptions of the issues addressed were not conducted.

Finally, the word count restrictions limited the detail of the findings, analysis and conclusions of this dissertation and supplementary information is included in the appendices.

5.10 Research reflection

This research represented an important contribution to the author's personal development. The review of literature, the design and implementation of data collection methods, the achievement of a significant response rate and the process of analysing and interpreting large amounts of information were challenging tasks. Completion of these tasks and of the dissertation itself has resulted in the researcher gaining a considerable amount of knowledge and information, not only of cultural resource marketing but also of the research process itself.

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www.discovernorthernireland.com

www.reformationtours.com

www.sacredsites.com

Appendix 1 | HERITAGE SITES LISTED WITH REPRESENTATIVE ORGANISATIONS

MUSEUMS, HERITAGE CENTRES & VISITOR CENTRES	Clare Museum
	Arthur's Row
	Ennis
Adare Heritage Centre	Co. Clare
Main Street	
Adare	Cliffs of Moher New Visitor
Co. Limerick	Experience
	Liscannor
Athlone Castle Visitor Centre	Co. Clare
St. Peter's Square	
Athlone	Coole Visitor Centre
Co. Westmeath	Coole Park
	Gort
Belleek Pottery Visitor Centre	Co. Galway
Belleek	
Co. Fermanagh	Craggaunowen, The Living Past
BT93 3FY	Kilmurry
	(near Quin)
Brú Ború	Co. Clare
Cashel	
Co. Tipperary	Cruachan Aí Heritage Centre
	Tulsk
Castlecomer Demesne Company Limited	Co. Roscommon
The Estate Yard	Dan O'Hara's Heritage & History
Castlecomer	Centre
Co. Kilkenny	Lettershea
	Clifden
	Co. Galway

Dartfield - Ireland's Horseworld
Museum and Equestrian Park
Killreekill
Loughrea
Co. Galway

Donegal County Museum
High Road
Letterkenny
Co. Donegal

Down County Museum
The Mall
Downpatrick
Co. Down
BT30 6AH

Dublin City Gallery, Hugh Lane
Charlemont House
Parnell Square
North
Dublin 1

Dublin Writers Museum
18 Parnell Square
Dublin 1

Dublinia and The Viking World
St. Michael's Hill
Christ Church
Dublin 8

Dublin's City Hall - The Story of the
Capital
City Hall
Dame Street
Dublin 2

Enniskillen Castle & Museums
Castle Barracks
Enniskillen
Co. Fermanagh
BT74 7HL

Foynes Flying Boat Museum
Foynes
Co. Limerick

GAA Museum & Croke Park Stadium
Tour
Croke Park
Dublin 3

Galway City Museum
Spanish Parade
Merchants Road
Galway

Guinness Storehouse
St. James's Gate
Dublin 8

Hunt Museum, Limerick
The Custom House
Rutland Street
Limerick

James Joyce Museum	Old Jameson Distillery
Joyce Tower	Bow Street
Sandycove	Smithfield Village
Co. Dublin	Dublin 7
John F. Kennedy Arboretum	Palace Stables Heritage Centre
New Ross	Palace Demesne
Co. Wexford	Armagh
	BT60 4EL
Locke's Distillery Museum	Saint Patrick's Trian Visitor Complex
Kilbeggan	40 English Street
Co. Westmeath	Armagh
Lough Gur Interpretive Centre	BT61 7BA
Near Bruff	
Co. Limerick	Skellig Experience Visitor Centre
	Valentia Island
Mizen Head Signal Station	Co. Kerry
Goleen	
West Cork	Somme Heritage Centre
Co. Cork	233 Bangor Road
	Newtownards
Newbridge Silverware Visitor Centre	Co. Down
Newbridge	BT23 7PH
Co. Kildare	
	The Blascaod Centre
Number Twenty Nine Georgian House	Dún Chaoin
Museum	Baile anFheirtéaraigh
29 Fitzwilliam Street Lower	Trá Lí
Dublin 2	Co. Chiarraí
	The Burren Centre
	Kilfenora
	Co. Clare

The Fry Model Railway
Malahide Castle Demesne
Malahide
Co. Dublin

The Navan Centre & Fort
81 Killylea Road Armagh
BT60 4LD

Tower Museum
Union Hall Place
Derry
BT48 6LU

Trinity College Dublin
College Street
Dublin 2

Tullamore Dew Heritage Centre
Bury Quay
Tullamore
Co. Offaly

Ulster American Folk Park
2 Mellon Road Omagh
Co. Tyrone

Ulster Folk & Transport Museum
Cultra
Holywood
Co. Down
BT18 0EU

Waterford Crystal Visitor Centre
Kilbarry
Waterford

BUILT HERITAGE

Adare Castle
Adare
Co. Limerick

Annes Grove
Castletownroche
Co. Cork

Ardfert Cathedral
Ardfert
Tralee
Co. Kerry

Ardgillan Castle & Victorian Gardens
Balbriggan
Co Dublin

Ardrress House
64 Ardrress Road
Annaghmore

Portadown
Co. Armagh
BT62 1SQ

Athenry Castle
Athenry
Co. Galway

Aughnanure Castle
Oughterard
Co. Galway

Avondale House and Forest Park
Rathdrum
Co. Wicklow

Ballindoolin House & Gardens
Carbury
Co. Kildare

Ballycopeland Windmill
Windmill Road
Millisle
Down
BT22 2DS

Ballyhack Castle
Ballyhack
Co. Wexford

Bantry House & Gardens
Bantry
Co. Cork

Barryscourt Castle
Carrigtwohill
Co. Cork

Beaulieu House & Garden
Drogheda
Co. Louth

Bellaghy Bawn
Castle Street
Bellaghy
Londonderry
BT45 8LA

Belvedere House, Gardens & Park
Mullingar
Co. Westmeath

Birr Castle Demesne
Birr
Co. Offaly

Blarney Castle
Blarney
Co. Cork

Blarney House and Gardens
Blarney
Co. Cork

Boyle Abbey
Boyle
Co. Roscommon

Brú na Bóinne - Newgrange and
Knowth megalithic tombs
Donore
Co. Meath

Bunratty Castle & Folk Park
Bunratty
Co. Clare

Cahir Castle
Castle St.
Cahir
Co. Tipperary

Castle Ward
Strangford
Downpatrick
Co. Down
BT30 7LS

Carrickfergus Castle
Marine Highway
Carrickfergus
Antrim
BT38 7BG

Charles Fort
SummerCove
Kinsale
Co. Cork

Carrowmore Megalithic Cemetery
Carrowmore
Sligo

Christ Church Cathedral
Christ Church Place
Dublin 8

Cashel House Hotel, Restaurant &
Garden
Cashel
Connemara
Co. Galway

Clonmacnoise
Shannonbridge
Athlone
Co. Offaly

Castle Archdale Country Park
Lisnarick
Irvinestown
BT94 1PP

Crom Estate
Upper Lough Erne
Newtownbutler
Co. Fermanagh
BT92 8AP

Castle Coole
Enniskillen
Co. Fermanagh
BT74 6JY

Deepwell House
Deepwell
Blackrock
Co. Dublin

Derrymore House
Bessbrook
Newry
Co. Armagh
BT35 7EF

Derrynane House
Caherdaniel
Co. Kerry

Derry City Walls
The Derry Visitor and Convention
Bureau
44 Foyle Street
Derry

Desmond Castle
Cork St
Kinsale

Desmond Hall
The Square
Newcastle West
Co. Limerick

Devenish Island Monastic Site
Enniskillen
County Fermanagh

Donegal Castle
Donegal Town
Co. Donegal

Downhill Estate & Mussenden Temple
Mussenden Road
Castlerock
Co. Londonderry
BT51 4RP

Dun Aonghasa
Aran Mor Island
Co Galway

Dundrum Castle
Dundrum Village
Dundrum
Co Down

Dungarvan Castle
Castle Street
Dungarvan
Co. Waterford

Dunguaire Castle
Kinvara
Co. Galway

Dunluce Castle
7 Dunluce Road
Bushmills
County Antrim
BT57 8UY

Dwyer McAllister Cottage
Derrynamuck
Knockanarrigan
Co. Wicklow

Emo Court
Emo
Co. Laois

Ennis Friary
Abbey Street
Ennis
Co. Clare

Ferns Castle
Ferns
Co. Wexford

Florence Court
Enniskillen
Co Fermanagh
BT92 1DB

Florence Court
Enniskillen
Co. Fermanagh
BT92 1DB

Fota House & Gardens
Fota Island
Carrigtwohill
Co. Cork

Gallarus Castle
Gallarus
Baille na nGall
Co. Kerry

Glebe House
Churchill
Letterkenny
Co. Donegal

Glendalough
Glendalough
Bray
Co. Wicklow

Gray's Printing Press
49 Main Street
Strabane
Co. Tyrone
BT82 8AU

Greencastle Royal Castle
Kilkeel
Down

Grey Abbey
Greyabbey
Down
BT22 2NQ

Hezlett House
107 Sea Road
Castlerock

Coleraine
Co. Londonderry
BT51 4TW

Hill of Tara
Navan
Co. Meath

Hillsborough Courthouse
The Square
Hillsborough
Co Down
BT26 6AG

Hotel Dunloe Castle Gardens
Beaufort
Killarney
Co. Kerry

Inch Abbey
Downpatrick
Down

Jerpoint Abbey
Thomastown
Co. Kilkenny

Jordans Castle
Ardglass
Down

Kilkenny Castle
The Parade
Kilkenny City

Killruddery House & Garden
Bray
Co. Wicklow

King House Interpretative Galleries &
Museum
Main Street
Boyle

Co. Roscommon

King John's Castle
King's Island
Nicholas St
Limerick

Knappogue Castle & Walled Gardens
Quin
Co. Clare

Knockabbey Castle & Gardens
Louth Village
Co. Louth

Kylemore Abbey & Garden
Kylemore
Connemara
Co. Galway

Lismore Castle Gardens
Lismore
Co. Waterford

Lissadell House
Ballinfull
Co. Sligo

Listowel Castle
The Square
Listowel
Co. Kerry

Malahide Castle
Malahide
Co. Dublin

Marlay Demesne
c/o Dun Laoghaire/Rathdrum County
Council
County Hall
Marine Road
Dun Laoghaire
Co. Dublin

Maynooth Castle
Maynooth
Co. Kildare

Mount Stewart House & Gardens
Near Greyabbey
Newtownards
Co. Down
BT22 2AD

Mount Stewart House and Gardens
Mount Stewart
Portaferry Road
Newtownards
Co. Down
BT22 2AD

Muckross Friary
Muckross Estate
Killarney
Co. Kerry

Muckross House
Killarney National Park
Muckross
Killarney
Co. Kerry

National Library of Ireland
Kildare Street
Dublin 2

The Navan Centre & Fort
81 Killylea Road
Armagh
BT60 4LD

Nendrum Monastic Site
Comber
Co. Down

Newbridge House
Newbridge Demesne
Donabate
Co. Dublin

Newman House
85/86 St. Stephens Green
Dublin 2

Newmills Corn and Flax Mills
Churchill Road
Letterkenny
Co. Donegal

Newtownbarry House, Gardens &
Gallery
Bunclody
Co Wexford

Old Mellifont Abbey
Tullyallen
Drogheda
Co. Louth

Palm House Botanic Gardens
College Park
Botanic Avenue
Belfast
BT7 1JP

Parke's Castle
Fivemile Bourne
Co. Leitrim

Patrick Pearse's Cottage
Inbhear
(near Rosmuc Village)
Co. Galway

Patterson's Spade Mill
751 Antrim Road
Templepatric
Co. Antrim

Portumna Castle
Portumna
Co. Galway

Powerscourt Town House Centre
South William Street
Dublin 2

Primrose Hill House
Lucan
Co. Dublin

Queen's University Belfast
University Road Belfast
BT7 1NN

Rathfarnham Castle
Rathfarnham
Dublin 14

Reginald's Tower
The Quay
Waterford

Riverstown House
Glanmire
Co. Cork

Rock of Cashel
Cashel
Co. Tipperary

Roscrea Castle
Castle Street
Roscrea
Co. Tipperary

Ross Castle
Killarney
Co. Kerry

Saint Patrick's Cathedral
Saint Patrick's Close
Dublin 8

Scattery Island Cathedral and
Monastery
Kilrush
Co. Clare

Shankill Castle & Gardens
Paulstown
Whitehall
Co. Kilkenny

Shaw Birthplace
33 Synge Street
Dublin 8

Skerries Watermill & Windmills
Skerries
Co. Dublin

Sligo Abbey
Abbey St.
Sligo

Springhill House & Costume
Collection

20 Springhill Road
Money more
Magherafelt

Co. Londonderry
BT45 7NQ

St Marys Church
Gowran
Co Kilkenny

Strokestown Park
Strokestown
Co. Roscommon

Swiss Cottage
Kilcommon

Cahir
Co. Tipperary

The Argory
144 Derrycaw Road

Moy
Dungannon
Co. Armagh
BT71 6NA

The Chimney Viewing Tower
Smithfield Village
Dublin 7

The Crown Liquor Saloon
46 Great Victoria Street
Belfast
Co. Antrim
BT2 7BA

Tintern Abbey
Saltmills
New Ross
Co. Wexford

Trim Castle
Trim
Co Meath

Tully Castle
Derrygonnelly
Fermanagh

Vandeleur Demesne
Kilrush
Co. Clare

Wellbrook Beetling Mill
20 Wellbrook Road
Corkhill
Cookstown
Co. Tyrone
BT80 9RY

NATURAL - CAVES

Aillwee Cave
Ballyvaughan
Co. Clare

Arigna Mining Experience
Arigna
Co. Roscommon

Crag Cave
Castleisland
Co. Kerry

Dunmore Cave
Ballyfoyle
Co. Kilkenny

Marble Arch Caves European Geopark
Marlbank Scenic Loop
Florencecourt
Co. Fermanagh
BT92 1EW

NATURAL – LANDSCAPES & GARDENS

Airfield Gardens
Upper Kilmacud Road
Dundrum
Co. Dublin

Altamout Gardens
Tulow
Co. Carlow

Annes Grove
Castletownroche
Co. Cork

Ballymaloe Cookery School &
Gardens
Shanagarry
Midleton
Co. Cork

Brigit's Garden
Pollagh
Roscahill
Co. Galway

Ceide Fields
Ballycastle
Co. Mayo

Doneraile Park
Doneraile
Co. Cork

Dromore Wood
Ruan
Ennis
Co. Clare

Enniscoie Gardens & Heritage Centre
Castlehill
Ballina
Co. Mayo

Fota Arboretum and Gardens
Fota Island
Carrigtwohill
Co. Cork

Giant's Causeway
44a Causeway Road
Bushmills
Co. Antrim
BT57 8SU

Heywood Gardens
Ballinakill
Co. Laois

Innacullin (Garnish Island)
Glengarriff
Bantry
Co. Cork

Irish National Stud, Japanese Gardens,
St. Fiachra's Garden & The Horse
Museum
Tully
Kildare Town
Co. Kildare

Kilfane Glen and Waterfall
Thomastown
Co. Kilkenny

Mount Usher Gardens
Ashford
Co. Wicklow

Kilmacurragh Arboretum
Kilbride
Co. Wicklow

Powerscourt House & Gardens
Powerscourt Estate
Enniskerry
Co. Wicklow

Kilmokea Gardens
Kilmokea
Great Island
Campile
Co. Wexford

Rowallane Garden
Saintfield
Co. Down
BT24 7LH

Lisselan Gardens
Lisselan Estate
Clonakilty
Co. Cork

The Talbot Botanic Gardens
Malahide Castle
Malahide
Co. Dublin

Lodge Park Walled Garden
Straffan
Co. Kildare

Tramore House Gardens
c/o Waterford County Council
Tramore
Co Waterford

Lough Key Forest Park & Activity
Park
Boyle
Co. Roscommon

Tullynally Castle & Gardens
Castlepollard
Co Westmeath

Millstreet Country Park
Millstreet
Co. Cork

Vandeleur Walled Garden
Vandeleur Demesne
Kilrush
Co. Clare

Woodstock Gardens & Arboretum
Inistioge
Co. Kilkenny

Dalkey Castle and Heritage Centre
Castle Street
Dalkey Heritage Town
Co. Dublin

HERITAGE TOWNS

Ballyhoura Heritage Information
Centre
Friar's Gate Theatre
Kilmallock Heritage Town
Co. Limerick

Ireland's Historic Science Centre
Birr Heritage Town
Co. Offaly

Brian Boru Heritage Centre
Killaloe/Ballina Heritage Town
Co. Clare

Kells Heritage Centre
The Courthouse
Headfort Place
Kells Heritage Town
Co. Meath

Cashel Heritage Town Centre and
Tourist Information Office
City Hall
Main Street
Cashel Heritage Town
Co. Tipperary

Kilrush Tourist Office
Kilrush Heritage Town
Co. Clare

Clew Bay Heritage Centre
The Quay
Westport Heritage Town
Co. Mayo

Kinsale Museum
Market Square
Kinsale Heritage Town
Co. Cork

Cobh the Queenstown Story
Deepwater Quay
Cobh Heritage Town
Co. Cork

Lismore Heritage Centre
The Courthouse
Lismore Heritage Town
Co. Waterford

Seanchaí - Kerry Literary and Cultural
Centre
24 The Square
Listowel Heritage Town
Co. Kerry

St. Mary's College Gardens
Emmet Place
Youghal Heritage Town
Co. Cork

Glenveagh National Park
Churchill
Letterkenny
Co. Donegal

Tipperary Excel Heritage Centre
Mitchel Street
Tipperary Heritage Town
Co. Tipperary

Killarney National Park
Muckross
Killarney
Co. Kerry

Trim Visitor Centre
Town Hall
Castle Street
Trim Heritage Centre
Co. Meath

Wicklow Mountains National Park
Park Headquarters
Kilafin
(near Laragh village)
Co. Wicklow

NATIONAL PARKS

Ballycroy National Park
Lagduff More
Ballycroy
Westport
Co. Mayo

Burren National Park
Co Clare

Connemara National Park
Letterfrack
Co. Galway

Appendix 2 | QUESTIONNAIRE COVERING LETTER

Institiúid
Teicneolaíochta
Leitir Ceanainn

Letterkenny
Institute of Technology



13 May 2008

Dear Manager,

I am a post graduate marketing student at Letterkenny Institute of Technology, Co. Donegal. As part of the Masters course I am undertaking a dissertation entitled '*Marketing Cultural Resources - towards organisational best practice*'. The aim of the study is to ascertain the role of marketing (and/or demarketing) in creating a sustainable balance between visitor numbers and the preservation of cultural resources.

As part of my primary research, I am conducting a survey of the main heritage attractions in both the Republic of Ireland and Northern Ireland and have enclosed a questionnaire for you to complete. All responses will be treated in strictest confidence and no attraction will be named in the study.

I would be much obliged if you would complete and return the questionnaire in the stamped addressed envelope provided at your earliest convenience. This research is being funded entirely by me and I would greatly appreciate your assistance with obtaining a high response rate.

If you have any queries regarding any aspect of the questionnaire or the survey as a whole, please do not hesitate to contact me on 086 3036 768 or at leanne_fullerton@yahoo.co.uk. Likewise, if you are interested in obtaining a copy of the findings of the research in the coming months I will be happy to provide same.

Many thanks in advance for taking the time to complete and return the questionnaire.

Yours faithfully,

A handwritten signature in blue ink that reads "Leanne Fullerton".

Leanne Fullerton

MSc in Marketing Practice student



Bóthar an Chalaídh
Leitir Ceanainn
Co. Dhún na nGall
Éire

Port Road
Letterkenny
Co. Donegal
Ireland

Telephone (074) 9186000
Int. +353 74 9186000

Fax (074) 9186005
Int. +353 74 9186005

Web site: <http://www.lyit.ie>

Appendix 3 | QUESTIONNAIRE

1. **Name of attraction**

County

2. State owned Charity/Trust owned Privately owned

3. Represented by:

An Taisce	<input type="checkbox"/>	Heritage Island	<input type="checkbox"/>
National Trust (Northern Ireland)	<input type="checkbox"/>	Office of Public Works	<input type="checkbox"/>
Houses, Castles and Gardens of Ireland	<input type="checkbox"/>	None	<input type="checkbox"/>
Other (please specify)			

4. (a) **Average number of visitors per month in peak season**
.....

4. (b) **Average number of visitors per month in off-peak season**
.....

5. Please indicate percentage of annual visitors that are from each of the following destinations.

No visitor tracking system in place

Northern Ireland and Republic of Ireland	%	United Kingdom	%
Rest of Europe	%	United States	%
Other, (please specify) %			

6. Please rank from 1-5 the seriousness of the following issues for the attraction, with 1 being the most serious issue and 5 being the least serious.

Queues	<input type="checkbox"/>	Littering	<input type="checkbox"/>
Vandalism	<input type="checkbox"/>	Wear and tear	<input type="checkbox"/>
Excessive number of visitors	<input type="checkbox"/>		

7. Please rank the following statements from 1-5 in order of relevance with 1 being the most relevant and 5 being the least relevant. This will indicate the role that marketing plays in reducing the seriousness of the issues outlined in Question 7.

Marketing plays no role; there are not enough visitors to have a negative effect	<input type="checkbox"/>
Marketing plays no role; the attraction can cater for high visitor numbers	<input type="checkbox"/>
Marketing plays a vital role in relieving negative behaviour by educating visitors	<input type="checkbox"/>
Marketing plays a vital role in relieving negative behaviour by influencing visitor routing throughout the attraction	<input type="checkbox"/>
Management (rather than marketing) plays a vital role in relieving negative behaviour by imposing visitor quotas	<input type="checkbox"/>
Other (please specify)	
.....	

8. Which of the following visitor restrictions are in place? Please tick all that apply.

	Always	During peak periods
Variations in admission fees	<input type="checkbox"/>	<input type="checkbox"/>
Traffic/parking restrictions	<input type="checkbox"/>	<input type="checkbox"/>
Pre-booking requirements	<input type="checkbox"/>	<input type="checkbox"/>
Restricted activities	<input type="checkbox"/>	<input type="checkbox"/>
Encouragement to come in low season periods	<input type="checkbox"/>	<input type="checkbox"/>
Access to fragile areas discouraged	<input type="checkbox"/>	<input type="checkbox"/>
Promotion of less fragile areas	<input type="checkbox"/>	<input type="checkbox"/>

Please provide details of areas that visitors are encouraged to visit and of any incentives offered.

.....

.....

9. (a) Is admission to the attraction free? Yes No

If Yes, please skip to Question 14.

10. Please rank the following from 1-4 with 1 being the most relevant and 4 being the least relevant.

The price is set by:

- dividing total costs by the expected number of visitors
- keeping in line with what similar attractions are charging
- what the representative organisation determines
- taking into account subsidies and funds

Other (please specify)

.....

11. Please rate the following from 1-5, with 1 being the most relevant and 5 being the least relevant.

The purpose of the price is to:

- attract more visitors
- deter certain visitors
- cover running and maintenance costs
- make a profit to reinvest in the attraction
- make a profit for commercial/private purposes

Other (please specify)

.....

12. What forms of interpretation/information/displays are used at the attraction?

Please tick all that apply.

- Signage Audio-visual displays Interpretative centre
- Literature (e.g. brochures) Tour guides

Interactive exhibits (please describe)

Other (please specify)

13. Please tick which of the following are relevant (Part A) and indicate how successful the interpretation has been at achieving each relevant goal (Part B).

Part A

Part B

The interpretation focuses on:	very unsuccessful	somewhat unsuccessful	neither successful or unsuccessful	somewhat successful	very successful
educating visitors about the history of the attraction	<input type="checkbox"/> <input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
influencing the distribution and direction of visitors	<input type="checkbox"/> <input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
encouraging visitors to act in ways that lessen negative impacts on the attraction	<input type="checkbox"/> <input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)					
.....					

14. Is the attraction's capacity a restriction considered in marketing and promotional activities?
 Yes No If Yes, please explain.

15. In relation to the marketing of the attraction, please rate the following statements in order of relevance with 1 being the most relevant and 5 being the least relevant.

Marketing for the attraction is carried out by a representative organisation.	<input type="checkbox"/>
Marketing is guided by a marketing plan.	<input type="checkbox"/>
Marketing is guided by a visitor management plan.	<input type="checkbox"/>
Marketing is carried out on an unplanned basis when deemed necessary.	<input type="checkbox"/>
The attraction does not conduct any marketing.	<input type="checkbox"/>
Other (please specify)	
.....	

16. (a) Which of the following promotional tools are used by the attraction? Please tick all that apply.

website/web presence	<input type="checkbox"/>	brochures	<input type="checkbox"/>	signage	<input type="checkbox"/>
print media advertising	<input type="checkbox"/>	radio advertising	<input type="checkbox"/>	television advertising	<input type="checkbox"/>
souvenirs:	<input type="checkbox"/>				
Other (please specify)					
.....					

(b) In your opinion what is the purpose of the website/web presence? Please tick all that apply.

to inform visitors of what is available at the attraction

to process bookings

to educate visitors of desirable behaviour at the attraction and of any restrictions that are in place

Other (please specify)

.....

17. (a) Please rank from 1-5 how preferable the following visitor types are with 1 being the most preferable and 5 being the least preferable.

Young individuals/couples

Families with children

Middle-aged individuals/couples

Groups

Older more affluent visitors

(b) If the attraction has a different method of profiling its visitors, please provide brief details.

(c) Are there any groups of customers that are considered undesirable or unprofitable at the attraction?

Yes No **If Yes, please explain.**

.....

.....

18. Kotler & Levy, 1971, identified *demarketing*, as an aspect of marketing that deals with discouraging customers or a certain class of customers on a temporary or permanent basis.

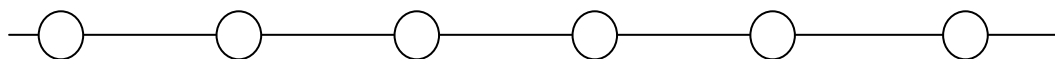
Does/has the attraction utilise(d) any form of demarketing?

Yes No **If Yes, please explain.**

.....

.....

19. (a) Is visitor research carried out? Yes No **If Yes, how often?**



<2 times a year

3-4 times a year

5-6 times a year

7-8 times a year

9-10 times a year

>10 times a year

(b) What does the research focus on? Please tick all that apply.

Origin of visitor Marketing material consulted before visit

Satisfaction with visit Changing visitor needs

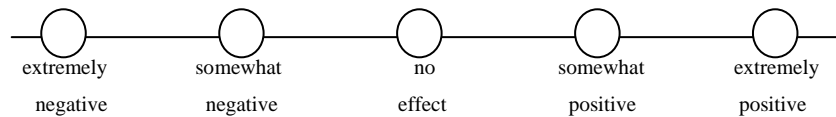
When/where visitors decided to visit the attraction

Other (please specify)
.....

20. (a) In what way has the original heritage resource been modified or enhanced to make it appealing and accessible to the target market?

.....
.....

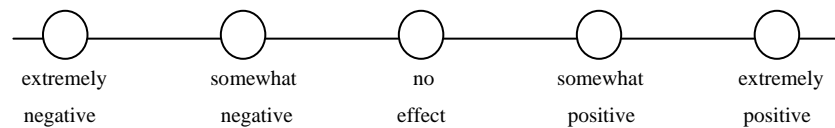
(b) In your opinion, what effect do the modifications have on the authenticity of the attraction?



21. In your opinion, is there a conflict of interests between preserving the site and increasing visitor numbers?

Yes No Please explain.

22. In your opinion, what effect does tourism have on the preservation of the attraction?



Please explain.

Thank you for taking the time to complete this questionnaire. All responses will be treated as confidential information and no attraction will be named in the study.

Appendix 4 | REPRESENTATIVE ORGANISATIONS

Fáilte Ireland

Fáilte Ireland guides and promotes Irish tourism. The organisation provides strategic and practical support to attractions to develop and sustain Ireland as a quality tourist destination. It works to support the industry in its efforts to be more competitive and more profitable and to help individual enterprises to enhance their performance.

Northern Ireland Tourist Board (NITB)

NITB's primary objective is to promote Northern Ireland as a tourist destination. It provides a service to the public for information on tourist destinations within Northern Ireland, public transport, accommodation and the various tourist attractions throughout Northern Ireland.

National Trust

The National Trust is a charity, completely independent of Government. It relies on membership fees, donations and legacies, and revenue from commercial operations. Throughout the United Kingdom it protects and opens to the public over 300 historic houses and gardens and 49 industrial monuments and mills.

Office of Public Works (OPW)

One of the responsibilities of OPW is the protection and conservation of Ireland's built heritage. This is administered by the Visitor Services division. The primary role of OPW Visitor Services is to assist in the protection of state owned built heritage sites and the presentation of those sites to the public. OPW recruits and trains tour guides, provides appropriate publications and undertakes promotional and marketing initiatives.

Heritage Island

Heritage Island is a marketing group representing the heritage visitor attractions and towns throughout Ireland. It is the only marketing organisation dedicated to the promotion of Ireland's major heritage attractions, on both sides of the border.

Houses, Castles and Gardens of Ireland (HCGI)

HCGI is a member organisation specifically representing historic houses, castles and gardens in the Republic of Ireland.

Appendix 5 | SEMI-STRUCTURED INTERVIEW LOG

Organisation	Location	Date	Time	Duration
Northern Ireland Tourist Board	Face-to-face interview Belfast	23 rd June 2008	11.30am	1hr 45 mins
National Trust NI	Telephone interview	27 th June 2008	4pm	1hr
Houses Castles and Gardens of Ireland	Face-to-face interview Dublin	30 th June 2008	10.30am	45 mins
Fáilte Ireland	Face-to-face interview Dublin	1st July 2008	10am	1hr 30 mins
Heritage Island	Face-to-face interview Dublin	1 st July 2008	3.30pm	1 hr
Visitor Services, OPW	Telephone interview	25 th July 2008	1pm	1 hr

Appendix 6 | SEMI-STRUCTURED INTERVIEW THEME SHEET

Visitors' contribution to preservation

Visitors = positive / negative contribution to heritage attraction preservation?

Preparing for visitor management considerations – only after 'demand' exceeds 'supply'?

Original heritage sites constrained by size / layout / legislation?

Marketing carried out by organisation interwoven with individual management plans at sites?

Nature of negative visitor impacts

	Difficulties caused by not enough visitors	Difficulties caused by too many visitors
Examples:	e.g Decay/ruin	e.g Devaluation of tourist experience
Types of sites:		
Reason:	e.g. lack of interest; insufficient funds	e.g. over-marketing

Promotion and onsite experiences

Organisation's role in shaping prior expectations of visitors so that on-site experiences meet or exceed expectations. Liaison with individual sites for this?

Visitor research

Market research – conducted by individual sites or representative organisation?

Segmentation and targeting

Different tourists visit for different reasons?

Do visitors that perceive a site as part of their heritage expect more from interpretations and displays than other visitors? (e.g. enrich knowledge; emotional involvement)

Pricing

Pricing – variations depending on ownership? (private / state / NGO owned)

Use of price as a demand control / site preservation mechanism

Variations in price depending on visiting conditions? i.e. busy/quiet spells

Visitors price sensitive?

Pre-booking

Use of prebooking / online booking by attraction

Interpretation

Interactive / multimedia exhibits – do visitors learn more from them than traditional static exhibits?

Purpose of signage and interpretation at sites? (Relieving pressure / Directing visitors / Educating)

Is interpretation necessary at some sites to convey their importance? Examples...

Are there sites that lend themselves to interpretative centres and some that don't?

Demarketing

Combining demarketing with visitor management

Educating potential visitors with promotional literature regarding appropriate behaviour

Encouraging specific desirable markets

Discouraging certain undesirable markets

Publicising alternative sites

Authenticity

'Repackaging' initial heritage attraction - Does this alter the authenticity of the attraction? Examples...

How important is authenticity for the visitor? (e.g. authenticity v entertaining)

Appendix 7 | TRANSCRIPTS OF SEMI-STRUCTURED INTERVIEWS

Lucia King, Market Planning & Intelligence, Northern Ireland Tourist Board

23rd June 2008, 11.30am

NITB represents more than just heritage attractions. You represent all kinds of visitor attractions in Northern Ireland.

What do you mean by heritage attractions?

Well, my research is concerned with the sites that represent some element of the past in particular those that may have preservation responsibilities, capacity constraints etc.

Such as the Giants Causeway?

Yes, exactly.

That is very topical at the moment as the National Trust has just launched its plan. Have you looked at our Strategic Framework for Action?

Yes.

It is basically concerned with five Signature Projects – The Titanic, Belfast; Giant's Causeway and Antrim and Causeway Coast Area; St. Patrick & Christian Heritage; The Mournes; and the Walled City of Derry. There is no National Park in Northern Ireland but the Giants Causeway (GC) was designated a World Heritage Site in 1986 – it was the first in Ireland. Dublin based architect and interior designer involved in rebuilding of visitor centre at GC after accidental fire in 2000. There was the possibility for a while of the visitor centre being built by a private developer.

But there is so much more to see than the GC but visitors don't initially know this. The coastal drive in that area is beautiful. The GC Signature Project spreads visitors and relieves pressure on the GC. It also adds value for the visitor. It's a 'win win' situation for the Giant's Causeway and surrounding attractions and businesses if a managed flow is achieved. From a visitor's point of view, when you arrive at a site, it's the unexpected experiences that you have that you remember.

Especially for repeat visitors so they are not just seeing the same thing again?

Absolutely.

Have you found that there have been problems at sites caused by too many visitors?

Not really. The thing with Northern Ireland is that we're playing catch up; the industry is not as mature as it is in the Republic of Ireland. The critical period for Northern Ireland was from 1995 onwards. The weather was great that summer and there was the ceasefire. There have been slight fluctuations since but the numbers have generally increased each year since.

What about castles and houses? Do they have too many visitors or are they the other extreme where they don't have enough visitors?

Built heritage tourism is hugely important. All along the Causeway Coastal Route there is built heritage, such as Carrickfergus and Dunluce Castle. I wouldn't know about their visitor numbers.

The NITB does the overall marketing for so many attractions. Do you encourage people to visit quieter sites and discourage them from busier ones?

£900,000 was spent on signage for the Causeway Coastal Route and it directs visitors to all sites included in the route whether well known or not. Television programmes that look at the landscape and history are making people more interested in the culture of Northern Ireland; history is the new cooking. The general public interest in heritage is greater and people are more curious, especially local people.

Are there different visitors – those that see a site as part of their own heritage and those who are there to be educated or entertained?

Yes, local people see it more as their own heritage but it still needs to be entertaining and not all about the education.

Do you carry out market research of visitors or is that left to each individual site?

Yes, as well as a visitor attraction survey, we do a visitor attitude survey.

From that, do you identify changing tourist needs and make sites more tourist-specific?

Yes I think we have to. We have to give visitors what they want and expect. For example, the research for the redevelopment of a visitor centre at the GC involved looking at what they have at the Cliffs of Moher visitor centre.

When changes are made for visitors, does it affect the site's authenticity? Do visitors even mind this?

I suppose it's personal preference but I think that signage and interpretation are imperative but need to be done discretely. Usually an unaltered building means nothing to a visitor but if there is a guide, a story or a theme at it, it completely changes that. However, some sites are amazing and beautiful and naturally generate good feelings, for example. Inch Abbey, the ruin of an old monastery and its location and lighting is stunning. But when you're trying to develop a story, a trail, there needs to be interpretation. Also, if a visitor only visits one site on the trail, they should still get the story. It's all about adding value, pitching to a level of someone that isn't interested in history and someone who is – finding the right balance. A good guide is of vital importance – someone who knows the facts but has a natural ability to entertain visitors. Visitors gain so much from a good guide.

Are multimedia or interactive exhibits more or less popular with visitors than static signs?

They are popular if they are appropriate for a site. For example, they wouldn't be suitable in a church such as St. Patrick's Cathedral. So yes,

Would you expect them more at a purpose built visitor centre rather than at an original site?

Yes. That sort of thing works very much, especially with children.

With the NITB's role in shaping people's expectations, how do you know if the message you put out there is what people experience when they visit?

We cannot carry out visitor research at every tourist attraction that we represent, but we work closely with organisations such as the Department of Employment and Learning to try to ensure that adequately trained people are employed in the tourism

sector. This is how we try to match the promise with the experience. Again it's the unexpected extras such as excellent customer care that impress visitors.

If your visitor research revealed that a particular site was not delivering the promise, would you contact the management of that site?

No, mainly because our research is not site specific. What we do find is that if visitors have a complaint they will call the NITB about things that we have no control over. But, I believe that if people are complaining about an attraction it means they care about it.

The final thing I want to ask you about is demarketing – have you come across this term before?

No, what is it?

It's not the opposite of marketing but would be to do with discouraging certain types of visitors or visitors at certain times.

Never heard of it.

Well publicising alternative sites is an element of it so I suppose you do this with the signature projects?

Yes, they are spread out trails that cause visitors to discover attractions that they wouldn't have normally visited. And interpretation is central to the trails.

Maurica Lavery, Marketing & Communications Manager, National Trust NI

27th June 2008, 4pm

In general, would you consider visitors to have a positive or negative contribution to the preservation of sites?

I think they have a positive contribution. The majority of our sites are there for everyone to enjoy and I think visitors respect that. It's about visitors being responsible and people coming to our mansions know that there will be restrictions in place and they respect that they can't sit on things etc. Most aren't off-put by restrictions.

Are there any sites where there has been such a high volume of visitors that visitor quotas have been necessary?

Carrick-a-Rede at times had had to stop visitors for health and safety reasons. As well, most of the visits at our properties are supervised and tour guides are in place. At Florence Court in the past two weeks items were stolen during a guided tour. That's the risk you take when you are too relaxed with visitors.

Do you carry out market research of visitors' needs?

We are constantly carrying out market research of visitors, examining their needs and likes. And those of our members also as we are a member organisation.

Would you say that different visitors visit for different reasons and what would that be?

Definitely. We have identified 7 categories of visitors:

Explorer families - they want an active and stimulating experience.

Out and about - they may not be interested in the heritage attraction - the sites are just a back drop for their day out.

Grey matter – these are slightly older people that want to learn and may also have more disposable income. They make up the majority of our members. We provide a source of mental stimulation to stretch their curious minds.

Young experience seekers - mainly under 30's with no children. They want to see awe-inspiring things.

Kids First families - the parents are happy if the kids are happy. They are the highest spenders but cost makes visits infrequent.

Then there is the segment called Live Life to the Full. They have a thirst for knowledge and quest for escapism

Home and Family - these are large groups of extended family and friends. They are generally price conscious and are therefore the lowest income segment. For them visits to our properties are usually a special family treat.

The majority of visitors fall into grey matter, explorer families, and out and about segments.

A lot of the attractions that I have surveyed said that they didn't segment or profile their visitors.

It's quite brave for us to segment visitors, of course everyone is welcome. We are a charity and so we are reliant on visitors, but not to segment is a bit of a cop out. When we segment we can deliberately focus on the segments; segment and then engage. We have researched the segments at each of our properties. When we know which segments are attracted to each site so we make a bigger effort to appeal to them.

What sort of actions do you take to target them?

For example, at grey matter properties we have more things available for people to do such as guided tours, lots of interpretation and more shop products. At kids first families properties, the facilities are more family oriented with a good selection of kids meals in the restaurants etc.

So the sites are adapted to meet the needs of the visitors?

Yes, they're always evolving.

Does that in any way affect the authenticity of the attraction?

You have to be careful not to end up with a Disneyland! There are times when conservation wins over tourism.

Is there a conflict between marketing and managing heritage sites?

No, it's just a challenge. We are constantly thinking about capacity, direction and the retail products. Our cash cows are the Giants Causeway and Carrick-a-Rede bridge.

Below that are properties that require some investment and then there is a small portion that are deficit properties so our only option is to maximise what we can.

Would you rely on signage and interpretation a lot to direct visitors?

We are always reviewing our signage and interpretation to ensure that it is appropriate bearing in mind the target segments for each site.

Do you have many interactive exhibits? Would they grasp people's attention more than traditional interpretation?

We actually find that the traditional signage works better in our case more than interactive exhibits. At many of our houses we have gardeners which act as guides also. We find that this brings a place more to life. And it came about as a result of research. Previously our gardeners would just lift their heads to say hello to visitors but when we learned that some visitors came and only went around the gardens and not actually inside the houses, our gardeners then became guides. People feel more connected when there is a guide. They get answers to their questions and they go away feeling satisfied.

With promotion shaping prior expectations of visitors, how do you control what is actually experienced at the site?

We are very joined up in our thinking so that on-site experiences meet promotion promises. Bear in mind that visitors don't just come to see the houses alone; they come for the wider experience.

What other things do they do when they are there?

Well, the gardens, the nature, restaurants etc. We reflect our investment then accordingly, for example, by training the gardeners to be guides.

Do you invest much in staff training?

Oh yes indeed. We have a huge focus on customers. All staff and volunteers attend training courses each year to ensure that customers receive the experience we promise.

Does your pricing policy vary depending on the popularity of sites?

Yes, I suppose we do price accordingly. Less popular sites would have a lower price and vice versa. A place with new facilities will be slightly higher and likewise if a place has temporary facilities during renovations for example, then we couldn't justify a high price. We rely a lot too on what other similar attractions are charging.

Do you vary prices throughout the year depending on peak and off-peak season?

No, the prices are the same all year round.

Do you find visitors to be price sensitive at all? Do they mind paying an entrance fee?

They don't mind so much paying an entrance fee but we're finding now with the recession that the secondary spend is impacted a good bit. People have already made the decision to come and so are prepared to pay to get in, but they're more reluctant to put their hand in their pockets a second time for coffees and souvenirs etc.

That's interesting. Is that just recently as a result of the recession?

Yes definitely. We've noted the decrease in secondary spend over the past few months.

The final thing I want to ask and you've covered it slightly is demarketing. It is not the opposite of marketing but an element of it that discourages visitors from certain areas or at certain times of the year or publicising alternative sites. Would you use it at all?

No not really. We definitely don't consciously demarket but maybe the segmentation would incorporate it a bit unconsciously. We don't advertise the Giants Causeway or Carrick-a-Rede because we don't need to.

The Causeway Coastal route that the NITB is promoting would be an example of it as it spreads visitors.

Yes that's one of their Signature Projects and it's working very well for all attractions involved.

Collette Scullion, Marketing Manager, Houses Castles and Gardens of Ireland

30th June 2008, 10.30am

In your opinion, do visitors have a positive or negative effect on heritage site preservation?

Visitors generally have a positive contribution to heritage attraction preservation. The income they generate can be reinvested in the site as subsidies and funding are not enough on their own. There are only a few places with extremely high visitor numbers, for example Skellig Michael and Newgrange, but they have the necessary controls in place to deal with it.

Are you in a position to promote quieter sites more than busier ones?

HCGI is a member organisation so it has to represent and market each member equally. However if we get a query from a visitor or tour operator looking for an attraction recommendation, we will give less well known sites a mention. Likewise, on the cover of our brochures annually, we change the photos of the attractions – this helps sites get recognition.

Do you carry out visitor research at all?

We do not do market research. We find it very difficult to do as people don't even return questionnaires.

Have you any way of ensuring that on-site experiences meet the promotional message?

Individual attractions provide information to us for the brochures and website so this is our only attempt to ensure that promotion meets the onsite experience. We are not involved in staff training or visitor research to obtain feedback to confirm this.

In your experience at individual sites, do modifications or enhancements affect the authenticity of the sites in any way?

Only larger sites make adaptations for visitors. People don't expect smaller sites to have visitor facilities. There is more potential for the authenticity to be affected if changes are made to a smaller site than a larger one.

Do you have any involvement with interpretation and signage at sites?

We don't get involved with signage or interpretation at sites. This is the responsibility of each site. We market at trade fairs, Chelsea and Bloom flower shows, on our website and we use direct mail to target international tour operators and car hire companies.

Are you familiar with the term demarketing? For example, quieter sites encouraging visitors and busy sites discouraging visitors.

I am not familiar with the term but perhaps when we rotate the pictures on the front of our brochures so that new members or less well known sites get notices, that would be a form of it. It is difficult for a member organisation to differentiate how it markets sites as each member pays the same fee.

Maeve McKeever, Built Heritage and Visitor Attractions Management and Marketing, Fáilte Ireland

1st July 2008, 10am

How important is cultural tourism in Ireland?

One of the three main motivators for visitors to Ireland is culture and within that, heritage is understood. On that basis, we have undergone restructuring of the heritage and culture department of Fáilte Ireland to reflect the importance of culture and heritage to the consumer and therefore to the Irish tourism product.

Up until January 2008, one person was responsible for the marketing of heritage and culture – it was seen as the one package. We've restructured since January and divided it into two main areas, one being heritage and the other culture. Each are still very close but now have separate managers. There is a manager for heritage and a manager for culture. Within the heritage area there are two areas – built heritage, my responsibility, and natural heritage. This would be the Cliffs of Moher, the Burren, flora fauna, ecology etc.

On the culture side of it, it is divided into living culture, which is modern arts, urban living and city breaks. The other is traditional culture, everything to do with the Irish language, the Irish islands etc.

So from the consumer's perspective, it is hugely important and we have been reflecting that in our structure.

What are the responsibilities of the various representative organisations, including Fáilte Ireland?

Within built heritage there are the two marketing groups, Heritage Island and HCGI. Then there is also, which isn't quite a marketing group, another representative body in the sector, OPW. They own and manage many sites, monuments and visitor attractions.

Heritage Island and HCGI are purely focused on the marketing of the product, whereas OPW would have other concerns such as preservation and maintenance of

attractions for future generations. Fáilte Ireland also has a dual remit. As well as marketing, we also have a developmental role, which is equally as important as the marketing role. Our job is to work with the industry on the ground and help them to develop the product. That can be anything from giving support in terms of capital, to actually physically building on a café or car park. Or it could be in the form of software, staff training – things that enhance the visitor's experience. We look at broadening the visitor experience as much as we possibly can.

Do you have heritage trails or try to group attractions in any way?

With the restructuring in general, we are looking at the heritage product a lot more closely, as we now have the resources now to do that. We are looking at developing a number of themed heritage initiatives in different regions of Ireland. We look at areas that already have a strong heritage product on the ground. There's no point going somewhere where there is nothing to develop. One of which is the Boyne Valley area. Obviously Newgrange is there but there is also Monasterboice and the towns Trim, Slane and Kells all within a drivable distance of each other.

Another initiative is in the West stretching up to the North West - Sligo and Donegal. We are developing a Christian heritage themed product, Knock, Colmcille etc. and again the idea of that is to build on the heritage that is already there. These are aimed at the more general holiday maker as we find that the specialist will find the information themselves. If they have a particular interest in something, such as archaeology or architecture, they will find out about it themselves. We don't actually motivate them to go there. Our marketing is aimed at the more general sightseer and culture seeker as we call them. These are the tourists that might want to include some culture into their holiday but also want a nice meal in the evening, accommodation, play a round of golf etc. The heritage themes are being developed but we are also trying to include other products so that there is a good strong tourism experience on offer. We try to get people to an area and give them reason to stay there. One of the primary remits that we have is to spread visitors around the country. Dublin has been the ultimate short break destination in Ireland.

Do you segment your visitors apart from 'general sightseers' and 'culture seekers'?

We do indeed yes. We have identified the three broad segments that culture tourists fall into, reflecting different levels of commitment to culture. There is the motivated cultural tourists - the holiday is motivated by the cultural element – their interest may be specialist or general interest. The inspired cultural tourists – they have some interest in culture, like you or me. If we go on holidays we want to experience something. These have a broad interest in culture and sightseeing. This is the main segment that we would go after. Then there is the incidental cultural tourists - they typically have another reason for their trip and participate in cultural activities that are in keeping with their travel plans. They are very much unprepared. They come to an area and they will do anything. It could be culture but it might not necessarily be. Culture probably isn't a primary concern for them.

So they are the three segments that we look at. The last two are the main ones that we would try to attract with our communications.

How important is interpretation and signage at sites?

Again, the specialists already know, they have the background. Whereas the other two segments, you need to add information to inspire their interest. Obviously it depends on the make up of the particular group and the site itself. That will influence the need for a guide or animation of the experience.

Do you think the meaning of places can be lost on people if there is no interpretation?

Yes absolutely. We work closely with our colleagues involved in training so that sites can introduce actors as part of their interpretation. It doesn't have to be as big as that though. It doesn't have to be a huge change. It's about changing the mindset of site management and getting them to think about who they are actually targeting and use the resources that they already have.

Does Fáilte Ireland have any influence over signage, what it says or where it goes?

Our environment and planning section would work with the local authorities regarding where directional signage in particular goes, on roads etc. That's the brown signs with white writing. There is a close relationship between that section of Fáilte

Ireland and the Local Authorities. We advise but ultimately it is up to them at the end of the day. And that is currently being reviewed at the moment. The National Roads Authority has a whole programme of review. You're looking at signs on motorways first, then national roads and then local signage. It's three-tiered.

What about on-site interpretation?

We have a programme at the moment that allows capital investment for individual sites to basically enhance their infrastructure. Visitor attractions and sites can apply to us if they want to redevelop. There is the opportunity there at the moment to avail of that funding. So that closing date has just passed so hopefully over the next couple of years there will be a lot of redevelopment and enhancements to sites. It's a way of them obtaining the money for the enhancements without having to increase entry prices or run fundraisers etc.

Regarding enhancements and actors etc., what effect would they have on authenticity of the original heritage?

Up to now, our experience has been that for most of the sites and attractions' management and owner, it's all about a lifestyle for them. They've only been concerned with the preservation of the sites and maintaining an authentic experience. The experience to date certainly hasn't been that they have gone OTT - the management would be very conscious of not doing that. Actually, we encourage them to use actors. It's finding a balance between their remits to maintain the authenticity of the product and marry that with getting the message out there. I think when we mention actors to them they get a bit worried. We try to make them understand that that's not what we're about.

What about promotional promises? When you send out a message, does your visitor research tell you if that was the actual experience that visitors had at the sites?

Well we just have communication between us and the management on the ground; it's difficult enough to get accurate feedback. We can only assist to a certain extent. We can guide them and provide trained staff. We have surveys, of people when they are leaving the country but by their very nature they are very short and it's difficult to

delve into their real experiences. From speaking to site owners themselves, we can get a fair impression of what visitor opinions were.

So do you encourage or train management to carry out their own research?

Yes, and again it's about changing that whole mindset. We encourage them to get customer responses and how to deal with them.

Is there any difference in the admission prices for state owned and private attractions?

Well many of the state owned, OPW, ones are free. They should be because that's going back to their ethos of being national monuments - they belong to everybody and everybody should have the right to visit them, for free. Obviously for the private ones, they don't have the same level of funding and need to charge to cover their costs. If visitors enjoy their experience, I don't think costs or entry fees are a big deal to them. Once a site offers value for money I think they're fine.

Something we've been trying to look at in this area is creative ticketing. It would be family passes, day passes, whatever it might be. If you give people a bit more value for money they might visit a range of attractions. So that kind of thing is definitely something to think about going forward. We're trying to coordinate it and bring them all together.

Do you think visitors are price sensitive?

Well with the UK and America's exchange rates, it is very expensive for them to come here. So they will try to get the best experience for the least amount of money. But at the same time places can't operate at a loss.

Is pricing used to control demand at different times of the year for example?

No not really. It's too difficult to administer. Tour operators get pre-sold vouchers and packages in advance so if the price has changed when they come it is bad form. Sites would be better trying to manage visitors other ways.

What other ways do you recommend?

We're encouraging sites to set up online booking systems, where visitors have to book ahead of arrival. This would give sites a preview of how busy they will be on a given day and from a visitor management perspective they could arrange the necessary staff etc

That would be a form of demarketing...have you come across this term?

Not usually but I have become familiar with it of late. I suppose what we are trying to do with our themed trails is a bit of demarketing. It's marketing that's a bit clever.

Helen Cole, Marketing Manager, Heritage Island

1st July 2008, 3.30pm

Can you tell me what exactly Heritage Island does?

Basically we are a marketing consortium, which is a marketing group for heritage visitor attractions and heritage towns throughout Ireland. We represent and market them to different markets. That would be mostly trade - tour operators, educational section – schools and the consumer. So we market them three different ways with the aid of our publications.

So it's all members that subscribe to Heritage Island?

Yes. They pay an annual membership fee, usually on an annual basis. We try to get them in for a couple of years but most of the time it's on an annual basis. Within that they get entry into the publications and representation on our website.

Everyone gets the same entry regardless of the heritage attraction's size?

Yes. Each entry has a photo and contact details. We send the trade publications to tour operators and specialist groups such as archaeological societies. The educational ones go to all primary and secondary schools and any language schools as well. A lot of the members really rely on the schools groups coming through. A lot of their business actually comes from that. Some of them would do educational programmes in line with the school curriculum. Then our consumer piece is 'The essential touring guide' which we retail at €5.99. All our members will offer a discount as an incentive to use it. People can save up to €100.

Do they just have to say that they have the book or are there vouchers in it?

They just bring it with them and they get the discounts then. We're looking at doing little pull out vouchers because a lot of our members wouldn't have the facilities to record all the discounts.

Do any of your members vary their prices in peak and off peak season?

They probably should. But the reality is, they're not that technologically advanced. It would maybe also mean altering signage and things like that.

You are not involved on site. Do you receive any feedback from visitors?

That's one thing that's great about the group is we have a great relationship with the marketing managers, (in some places the marketing manager is the general manager and the accountant and everything). So we do get a lot of feedback on every day life at the sites. What we are trying to do actually in September is run marketing courses and PR seminars for them as an added service that we want to provide. Although we do the marketing, it's about being part of a group and for them to be able to communicate with each other and have that added learning network. A lot of the existing workshops are very accommodation-specific; they are not visitor attraction-specific which is a whole other ball game. We want to do a seminar with Fáilte Ireland so that our members can come along and get that kind of networking.

Would you say that a lot of them aren't that marketing oriented?

They don't necessarily think that they have to market themselves. They might do domestic marketing with local groups. But being part of Heritage Island, it's not just marketing, it's not just advertising, it's being part of a group and they can network with each other. They should feel that they are part of something bigger.

Would you say that your directory helps to spread visitors to lesser known sites?

Well a tour operator, for example, will open it and say 'We do tours to Kerry so what's in that area?' In saying that, it can be quite difficult to get tour operators to change their itinerary. We would always try and push a new member particularly over giant visitor attractions that will always be on the route.

Would you agree that that works well for the giant attractions too?

Yes it's positive for them too; it relieves the pressure on them a bit. A lot of the places, obviously the bigger sites, have the visitor centres such as Bru na Boinne or the Cliffs of Moher. I was down there last week and I hadn't seen their new visitor centre. It's amazing and in a way actually encourages people to go through the visitor centre. If it's raining or that not everyone will take that walk up to the actual site.

What s your opinion on such visitor management?

It has to be done. The bigger sites do this well with simple efforts such as visitor routing. They realise that putting visitor management in place actually has a positive

effect on the visitors' experience because they will say, 'I wasn't in a room with 50 people'. They won't say, 'I couldn't get near the signs or the touch screens'. It's the visitors' experience that matters at the end of the day.

Do you find that places put visitor management in place when they receive lots of visitors or are they prepared for it in advance when numbers are moderate?

I think it would differ. The ones that have been doing it for a long time are used to it. I think on average, they're very good at managing the visitors. I think they're quite well prepared. The ones that aren't as busy, if they suddenly had a huge interest for whatever reason, well then they might suddenly have to back up but I think most are fairly well planned.

Do many sites use pre-booking?

There are really good software packages available where tourists can pre-book tours. Again that's bringing the technical side into it. We're trying at the moment an online booking system for our members that would be based on our website. A visitor will be able to go online and book a ticket to somewhere. The ticket will get sent to their email address and they print it out and bring it with them. We're trying to do that to encourage sites to look at booking online and having a revenue stream from that. Guinness Storehouse, for example, I think 90 per cent of their visits are booked online. Out of all our members Guinness Storehouse and Jameson would be the only two to have an online booking system so the potential is there. The company that we are working can provide a management system for any of our members that find our online booking system useful. We would encourage them to develop a separate relationship with the booking provider so that they could bring in a certain amount of visitor management and they would know in advance how many visitors are going to be coming through the door.

I would think that once they try it they'll see the advantages.

That's all in the plans anyways.

And the coverage that you get, it would be difficult for an individual site get that on their own.

Our membership is the equivalent of four advertisements in the Irish Times. It's very good value for the marketing service and because we've been going for so long we've got a good relationship with Fáilte Ireland.

Would you be similar to Houses Castles and Gardens of Ireland?

Yes we're a similar idea. Obviously their product is a little bit more specific. A lot of our members would be members of HCGI also. Like Castle Coole and Powerscourt. They would find benefit in being members with both of us. We do reciprocal advertising with them. They'll go to a consumer show and maybe take our brochures and we'll go to consumer shows and we'll take their brochures. At the end of the day we don't see it as competition. It's all about spreading the word about the attractions.

Do you do visitor research at all or is that up to the individual sites?

We don't do a huge amount. Every quarter we'll send out a survey to our members to see how the season went and how things are. Compared to last year are things up or down etc. But...out of 93...only a few ever get back to us. I don't know if it was online would they find it any easier. We rely a lot on the ITIC ezines, the Irish Tourism Industry Confederation. They're brilliant. We have signed up for their monthly ezine. They are very, very good and they have a blog and everything. They give fantastic up to date statistics, figures and feedback. I forward the information to our members also if there is anything relevant.

What we do as well is I spend the summer visiting all of our members. I go and have a cup of tea and a chat and do little centre report. And I get really good feedback on how their year is going compared to last year, their concerns and what they want out of the group. That research is really for our own gain.

Would you say that there are different segments of visitors that come to heritage attractions?

Definitely. There is that kind of older, retired, domestic segment that will hop in their car and visit a historic house on a day visit. Then the domestic families which are very good at the moment. Many sites are hoping that that will carry them through this year because it's a bit tricky this year. Our members are hoping that less people will go abroad and that the domestic market will stay strong. Many of our attractions are

family friendly which is good because the kids can run off and play in the children's section. The American and UK visitors love the Irish heritage and the Germans are very good because they like the product and the discounts that we do. The French are performing very well this year; the Italians, not so much.

Then you have sometimes people around our age that will visit the bigger attractions, the well known ones so that they can say that they've been to them. It does vary which is good because you are marketing to a wide range.

What is the signage and interpretation like at your members' sites?

I know a lot of them are moving away from just the big panels of writing and a lot have redone their visual displays. They are getting more interactive and visual to get visitors' attention. I know that they are trying to move into that. Even the iWalk podcast that Dublin Tourism does is very with it and modern. There's obviously a segment there that want that or need that. It will be interesting to see how that will play out. Perhaps Fáilte Ireland will do doing podcasts for people driving around in their cars. Something self-guided, run by Fáilte Ireland would be good.

I know Tourism Ireland has gotten into the whole second life. I don't really understand the concept...you sign up and you're a user in 3D. You choose your clothes etc. and you can go to different hotels. Tourism Ireland basically has a St. Patrick's festival in second life.

Do you think do any of these things affect the authenticity of sites?

I know actors are really popular. Tourists love it and it's more engaging. It's much more informative than walking through a room and seeing only signs. I think where possible, help with interpretation. If you can bring it in, do it. If sites don't market they'll have no one coming through the doors. I know a few of our members have that problem that they don't want to market as they are afraid of affecting the conservation of the site.

That is my overall research question – is there a conflict between preserving a site and marketing it?

In some regards, without getting the flow of visitors a lot of sites wouldn't be able to stay open and would get worn down. For example, the amount of money it takes to run historic houses and keep them in good condition. Without opening the doors a lot of them would find preserving them difficult. I think the type of visitors that you get to heritage attractions are very respectful and part of the attraction's role is to actually explain how to be respectful.

Those that have websites and those that do marketing, do they try to tell people before they visit about what restrictions there are so it's no shock when they come?

Yes they're quite good at trying to communicate that.

Regards promotion, your role in shaping prior expectations - can you help ensure that this is what s actually experienced?

Obviously we are marketing a collective group and not so much individual sites. We do send out an ezine every month to subscribed consumers which would hone in on particular events, different things going on at the attractions.

Do you demarket in any way? It would be encouraging visitors to quieter sites or areas within sites while discouraging them form the busier ones.

Well, in a sense, because we don't just market the top visitor attractions and we have such a range of attractions from quieter ones to the very popular ones - every one gets the same coverage from us.

Regarding pricing, are the prices higher at privately owned attractions?

Well museums have traditionally been free and then the privately owned ones tend to be slightly higher. Then you have the charities as well charge a little bit more.

And are visitors price sensitive?

Having been out and about lately in the visitor centres, I have heard that visitors aren't spending as much in the shops and cafes. Even the tour operators' margins have gotten a lot tighter. If they are doing a lunch stop they will think about where they stop. Tourism is dependent on disposable income. If there is economic difficulty

people look at what luxuries they can cut out. But I think they'll be fine. Every year there is something. I was foot and mouth another year.

Jacqueline McHale, Marketing Executive, Visitor Services, OPW

25^h July 2008, 1pm

My research is to determine if there is a conflict between marketing heritage attractions and trying to preserve them. In general would you say that visitors have a positive or negative contribution to preservation?

Overall, I would say that visitors have a positive effect. There are two scenarios, free sites and sites with admission fees. If visitors visit a free site the site becomes more recognisable by word of mouth and in turn this increases the local knowledge of the site and its importance. At fee paying sites, the money generated ultimately contributes to the general maintenance and upkeep. In both cases visitors help keep information in circulation and pass on knowledge that would otherwise get lost quite quickly.

That seems to be what I am finding out; it is only in extreme circumstances that visitors have a negative effect. Would you agree?

There is always the risk of stones or artefacts going missing but on balance I would say that visitors have a positive impact.

Does OPW carry out market research?

No, not at all. The Visitor Service is a new section of the OPW since September 2007 so we are playing catch up so far and market research is something that we haven't gotten around to yet.

Without having done any research, what would your personal opinion be on different tourists visiting for different reasons? Do different people have different expectations from a site?

That's a hard one to answer. The OPW's role is not really to *attract* tourists. There will always be tourists that don't get what they expect to get from a site. For example, coffee shops may be more important to a visitor than the historic site itself. I think it all depends on the tourists' expectations and what they want to get out of it. If they are just there on a general day out they might not care too much about the heritage attraction but if they are interested in history and there for that reason, they will pay more attention to the heritage aspect of the site.

Does OPW have much input into signage and interpretation at sites or is that the responsibility of each one?

That is all included in OPW's Business Plan.

Is your business plan available to the public?

No, unfortunately it is an internal document.

Following on from signage and interpretation, I'd like to ask you about authenticity. With interpretation and staged events, do you find that this can affect the authenticity of a heritage attraction or do visitors even care about this?

That would be a question for each individual site, but, what I would say is, because OPW's sites are owned by the state, it would not be in anyone's interest to re-enact something or say that something happened that didn't. However, an influence on authenticity that we cannot control is tour guides. Two different people to the same site may receive different information depending on the guide on duty and his/her level of knowledge on the area. You can sometimes get the case where a guide will exaggerate a story or throw in a story about the place being haunted just for entertainment purposes. They are not intentionally affecting the authenticity of the place or the story.

Does OPW provide training for guides?

No it is site specific so it is done on site.

But is OPW overall responsible for it?

Well OPW recruits the guides and gives an outline of what is required from them. But generally these positions are only applied for by people with an interest and good knowledge in history so there is little training as such required.

So you train them to a certain extent but if they have more knowledge you can't stop them telling it to visitors?

That's it. The interpretation all depends on the site, the guide and the visitors.

Regarding promotion, when you carry out market research in the future, will you be interested in finding out if the message visitors received from marketing was what they actually experienced during the visit?

To be honest I don't know if we will.

Yes, it seems from talking to other organisations that even carrying out the research is quite difficult.

If we do it, it will have to be standing outside a site stopping people and asking them questions to their faces. That's also the least expensive option.

What about OPW's heritage card? Is that facilitating target marketing now or in the future?

Well not really. Because heritage cards are sold at a number of different points, there is no central database with purchasers' information. The cards are sold in tourist offices and because these are not our outlets we can't record details of who buys them.

So if someone bought a card and went to five different sites, you have no way of seeing that those five sites were visited by the same person?

The technology just isn't in place.

I read that OPW was looking into putting a magnetic strip on the cards to record such information.

Well that's a long way away because it involves more than just adding a feature to the cards. The technology would need to be in place at every single attraction owned by the OPW and some are so small, such as Sligo Abbey, we're lucky if they even have a computer at them.

For sites that have admission fees, does the price ever vary depending on peak or off-peak season or is it always the same?

It is always the same but reviewed every year. It seems a bit late but we are currently reviewing our prices for 2009.

How do you decide what sites are free and what ones are worth paying an entrance fee to?

The sites with no admission fees are free to encourage more visitors and at the other end of the scale to discourage visitors from some of the larger sites. Again, we are not a tourist or visitor attractor. We are there to conserve and preserve.

What I've come across in the literature is demarketing which is either encouraging certain types of visitors and discouraging others or encouraging visitors to go to certain areas and not to others.

Well the issue we have is that the sites belong to everyone so we cannot be seen to discriminate against anybody. But in the majority of cases, that is why the admission fee is there - so that people just have to think twice about going. Yes, we do not turn anyone away but we say, listen, this is a heritage site and treat it as such. This is where the guides are important as there are set routes and time allocations.

The extreme example is Newgrange isn't it; would you say that the visitor centre is there to discourage people from visiting the actual monuments themselves?

Yes. I think people will still go to the site as they have full access to do so. There is no discrimination or turning anyone away but there is control. But of course Newgrange is as you say an extreme example.

**Appendix 8 | SUPPLEMENTARY INFORMATION FROM PHASE ONE
PRIMARY RESEARCH**

Demographics, ownership and admission details (4.2.1)

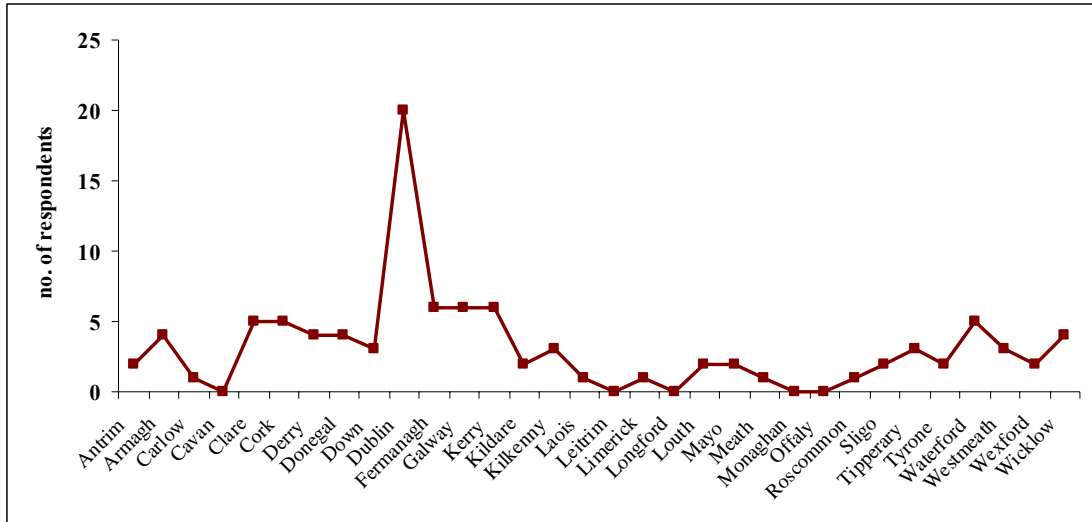


Figure A1: Location of survey respondents

Selection of comments regarding the effect of tourism on the preservation of heritage attractions (4.2.2)

‘It brings attention to important sites and their role in heritage.’

‘Too many visitors can damage the gardens, paths, wildlife etc.’

‘If it was not kept up for visitors, this place would not be able to be maintained and would overgrow again.’

‘As a tourist attraction we survive on the tourist to keep the doors open.’

‘Without visitors there is no funding to provide maintenance which is needed no matter what.’

‘Increase in traffic at peak times, but we do need the income.’

‘The higher the purpose of the site – the more potential funding may be invested into it.’

‘The fabric of the building is being damaged incrementally however repairs and maintenance of the building could not be afforded were it not for the visitors.’

‘Heightens awareness of importance of heritage.’

‘Often, when people see how tourists appreciate historic sites they realise how fortunate we are to have such treasures. Also, those involved in tourism appreciate that heritage sites play a vital role in attracting tourists & tourist revenue. This strengthens our request for increased funding.’

‘Tourism brings in extra visitors, raises the profile of the attractions and the local area contributing to overall sustainability.’

‘If handled correctly tourism can raise people’s awareness of our heritage and need to preserve it.’

‘The site is preserved protected and maintained to accommodate visitors.’

‘Without the impetus to use this site as a tourist attraction the level of conservation/repair work would probably not be as extensive.’

‘It makes us try harder & it’s good to share the place hence effort.’

‘Very strictly speaking any visitor is damaging to the site but visitors have been coming here for hundreds of years - There was damage done within the cave since Cromwellian days.’

‘Preservation and maintenance are carried out by the OPW on this national monument because it receives visitors. Special attention is paid to ongoing maintenance e.g. grass cutting during the season when visitors arrive.’

‘Depends on the type of tourism.’

‘Increases awareness of the existence of the site and similar sites’

‘Visitors understand the need to preserve ancient monuments more so after their visit.’

‘Being a tourist attraction the site has to be maintained to a standard if it were not a tourist site it could quite easily be neglected.’

‘It provides an incentive to keep the centre & gardens in good condition & maintains them on a regular basis.’

‘Revenue received is used to finance the maintenance & restoration costs of this and other sites.’

Selection of comments from respondents that said there is conflict between preserving heritage attractions and increasing numbers of visitors

‘The castle was never built to hold the number of people now wanting to view it. Its layout poses questions on health and safety’.

‘The more visitors, the more damage’.

‘I think we do need to be careful on managing the wear and tear and encourage the wider use of the garden and whole property’.

‘Footfall has an effect on the fabric of this medieval building. Tiles are worn, Stonework is damaged’.

‘Building is over 400 years old and some areas are delicate’.

‘Increased numbers lead to damage to some exhibits, especially in summer’.

‘Peak periods in July and August see 6000+ people a day onsite. Excessive numbers make visitor management very difficult and increase dangerous behaviour by a minority of visitors. Opening hours have been extended in the summer months to allow for additional visitor capacity. Advance booking is required by coaches’.

Selection of comments from respondents that said there is no conflict between preserving heritage attractions and increasing numbers of visitors

‘Our built heritage is in the ownership of everyone and knowledge brings pride and understanding’.

‘The carrying capacity of the institution has not yet been reached and visitors do not have a detrimental impact’.

‘No, as we are closed for about seven months the site is not really affected’.

‘The infrastructure for up to 100 visitors per day is in place’.

‘Visitor education and management reduces risks’.

‘As long as it remains guided and people don’t litter and keep to the paths there is little reason to believe numbers would affect the site’.

‘We restrict each guided tour to a maximum of 22 adults at a time as we feel this is a manageable amount of visitors for each guided tour and it enables visitors to enjoy the tour in comfort and also preserve the interior’.

The extent to which visitors impact negatively on heritage attractions (4.2.3)

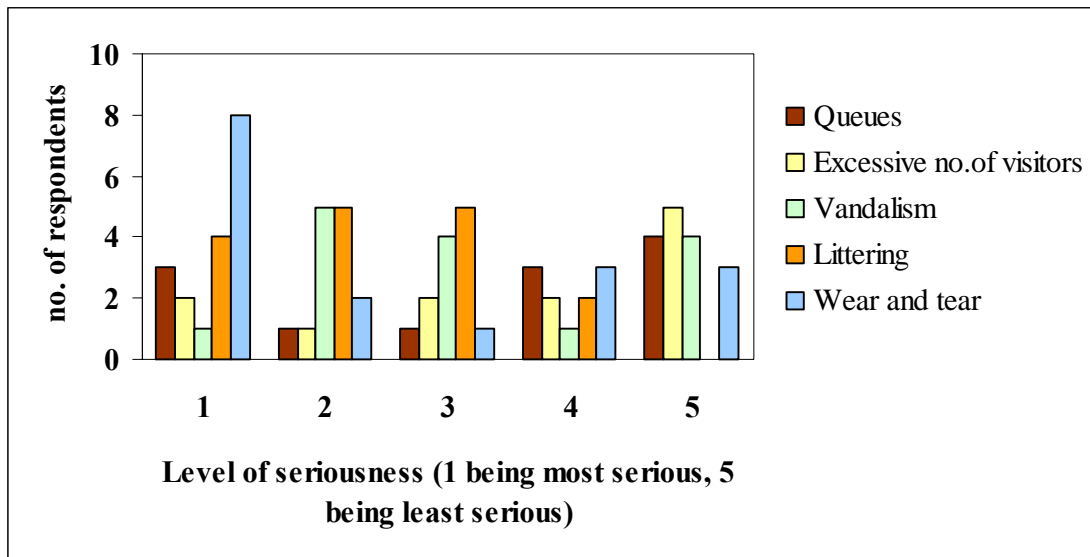


Figure A2: Negative impacts of visitors at sites with <2000 visitors per month in peak season

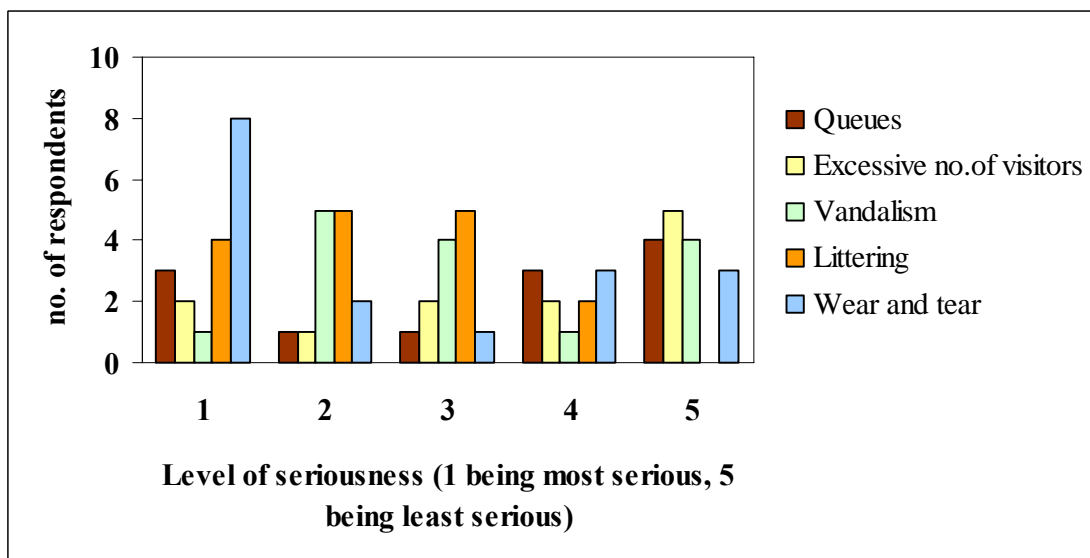


Figure A3: Negative impacts of visitors at sites with 2000 - 4999 visitors per month in peak season

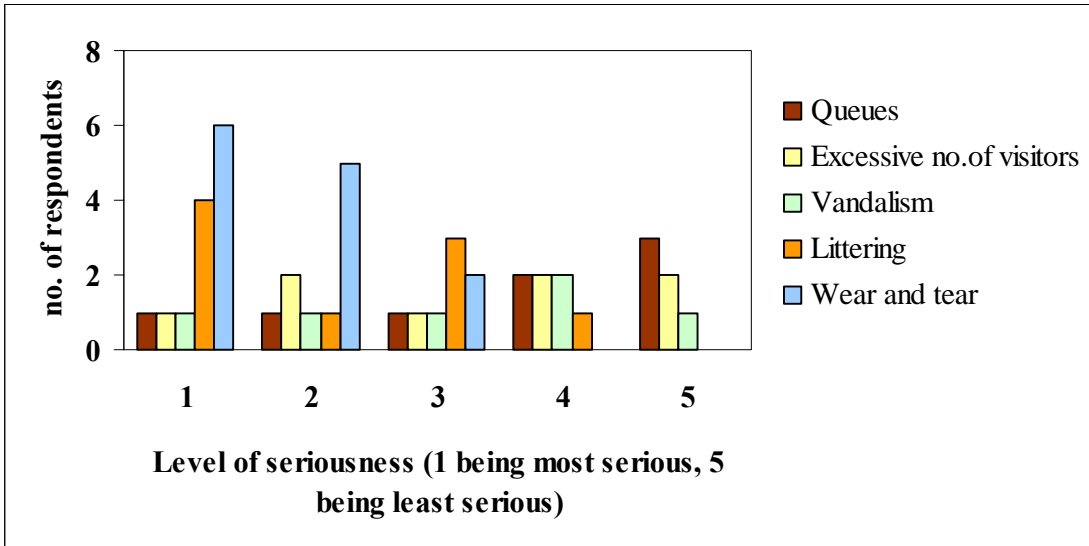


Figure A4: Negative impacts of visitors at sites with 5000 - 9999 visitors per month in peak season

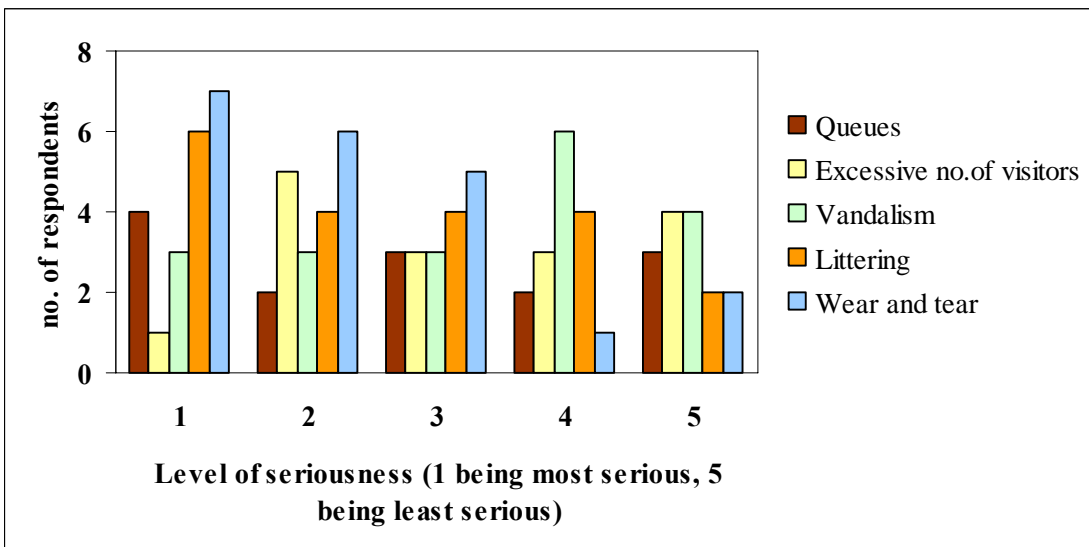


Figure A5: Negative impacts of visitors at sites with >10,000 visitors per month in peak season

Capacity restrictions' influence on marketing (4.2.5)

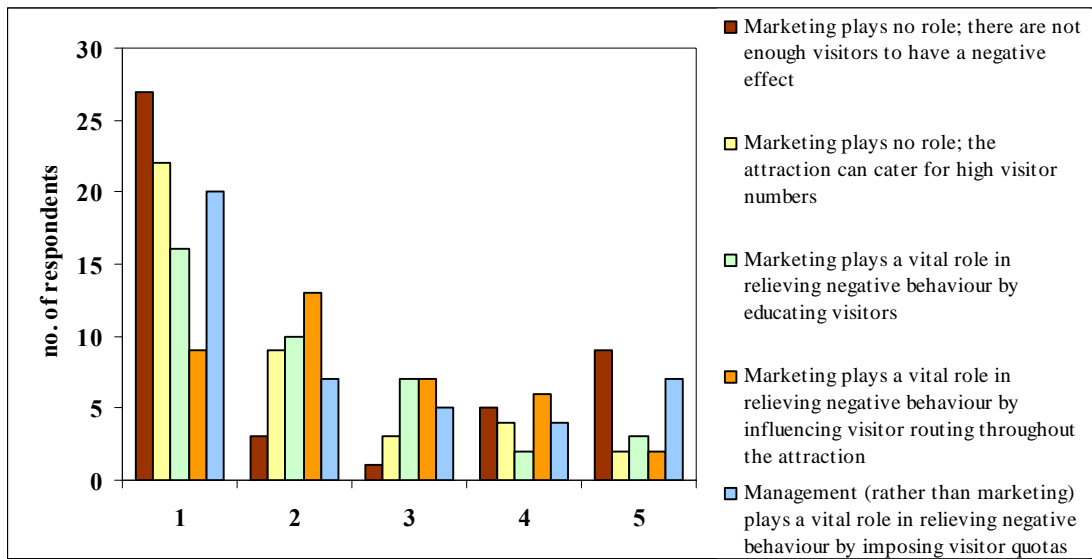


Figure A6: Role of marketing in visitor management at privately owned heritage attractions

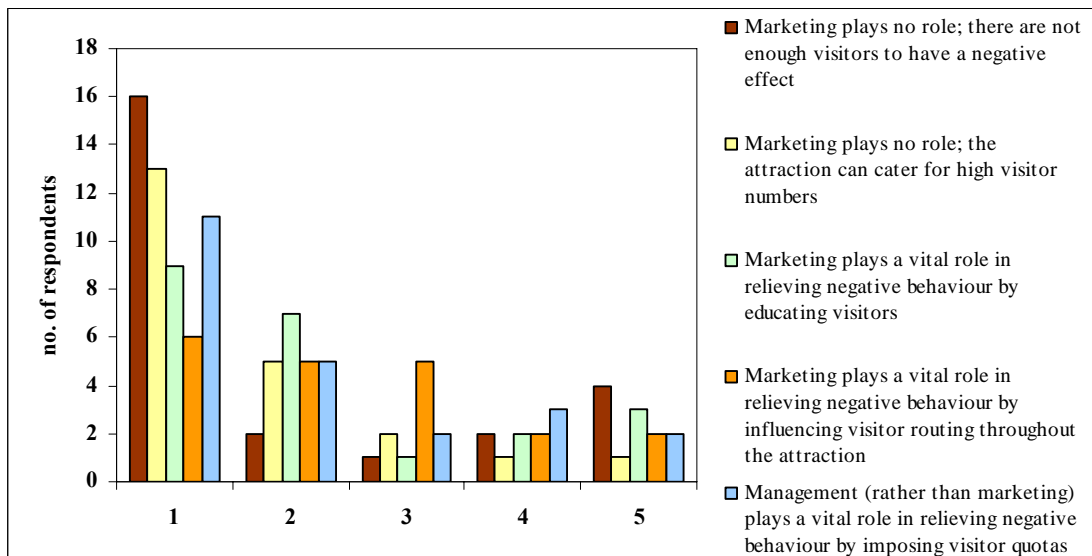


Figure A7: Role of marketing in visitor management at state-owned heritage attractions

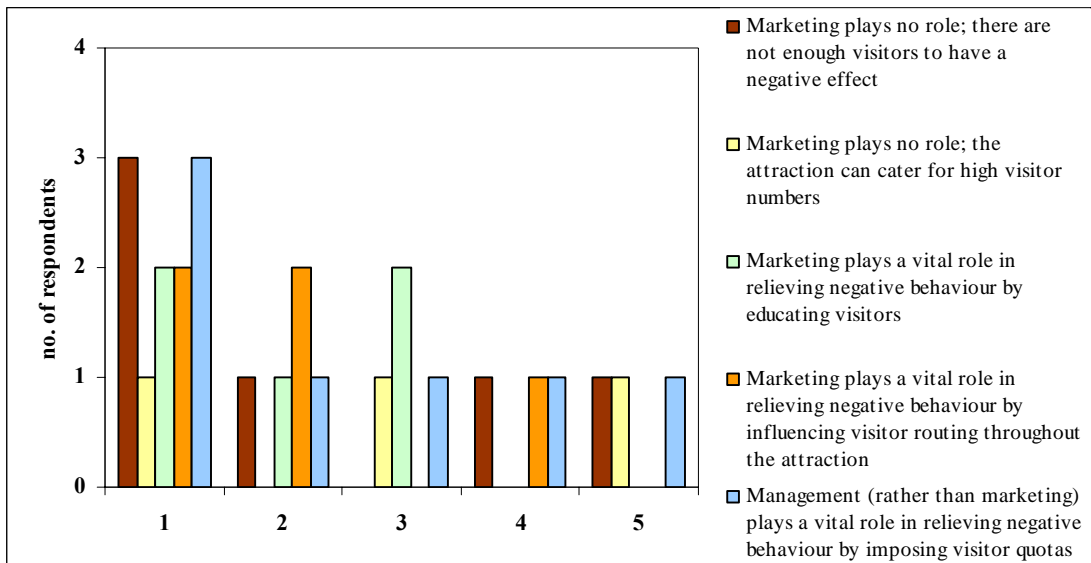


Figure A8: Role of marketing in visitor management at charity/trust owned heritage attractions

Segmentation (4.2.7)

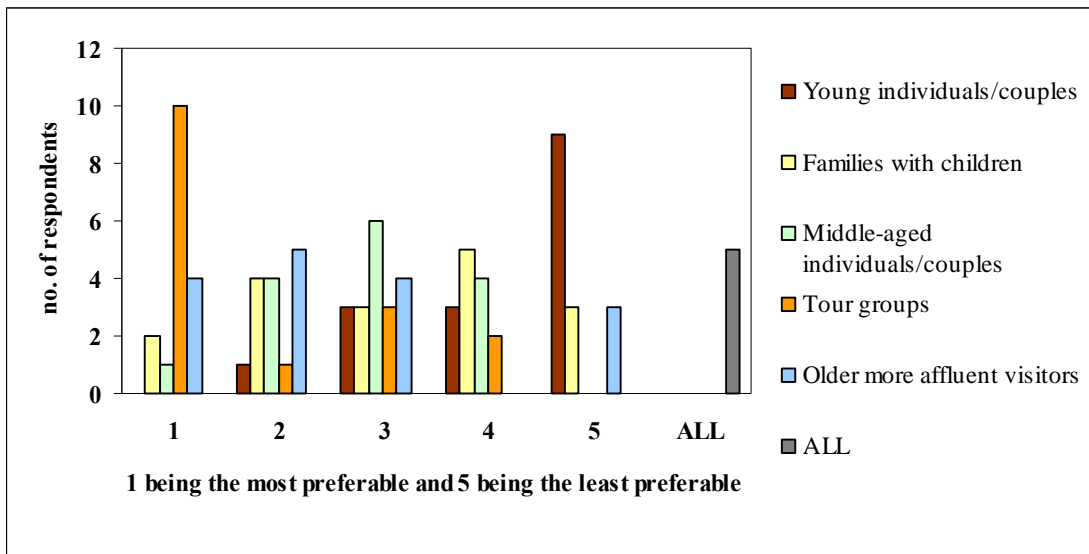


Figure A9: Preferred visitor types at privately owned heritage attractions

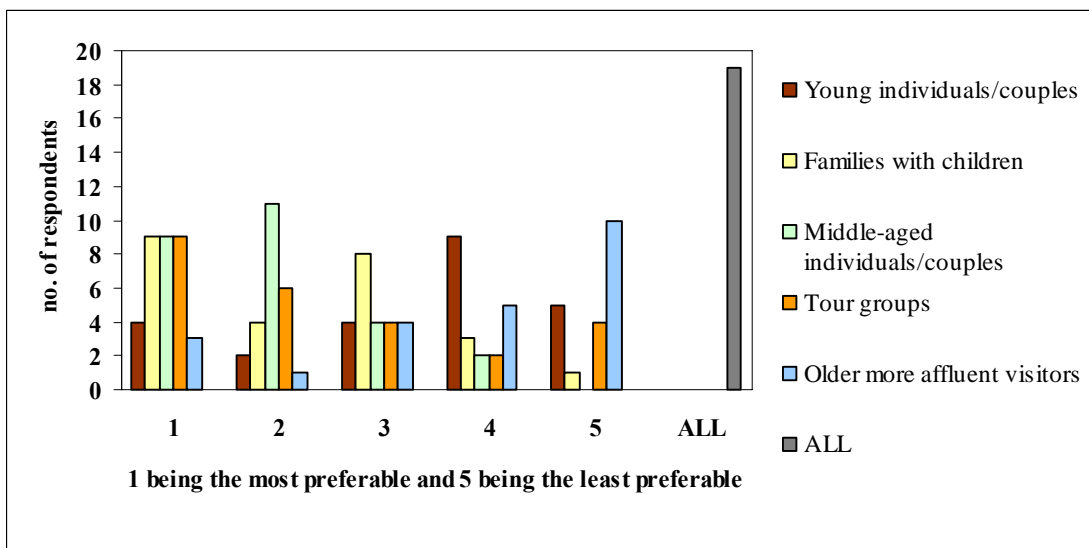


Figure A10: Preferred visitor types at state-owned heritage attractions

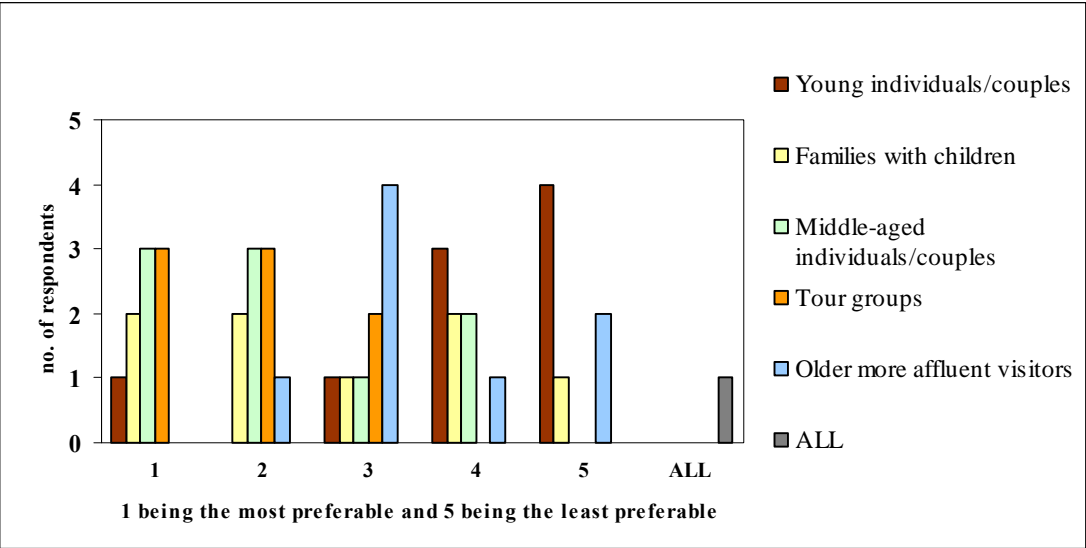


Figure A11: Preferred visitor types at charity/trust owned heritage attractions

Admission price (4.2.8)

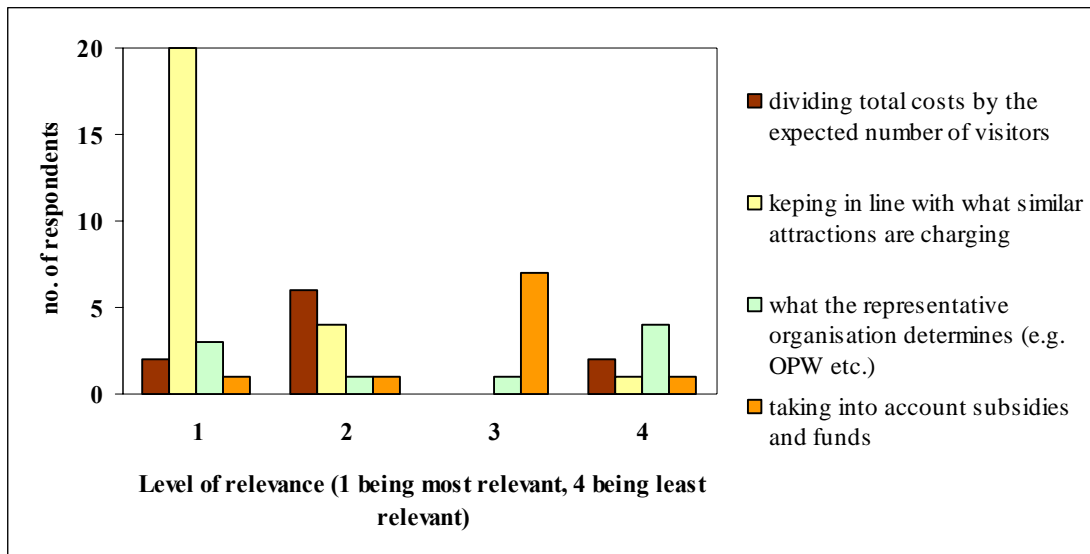


Figure A12: Method of setting admission price at privately owned heritage attractions

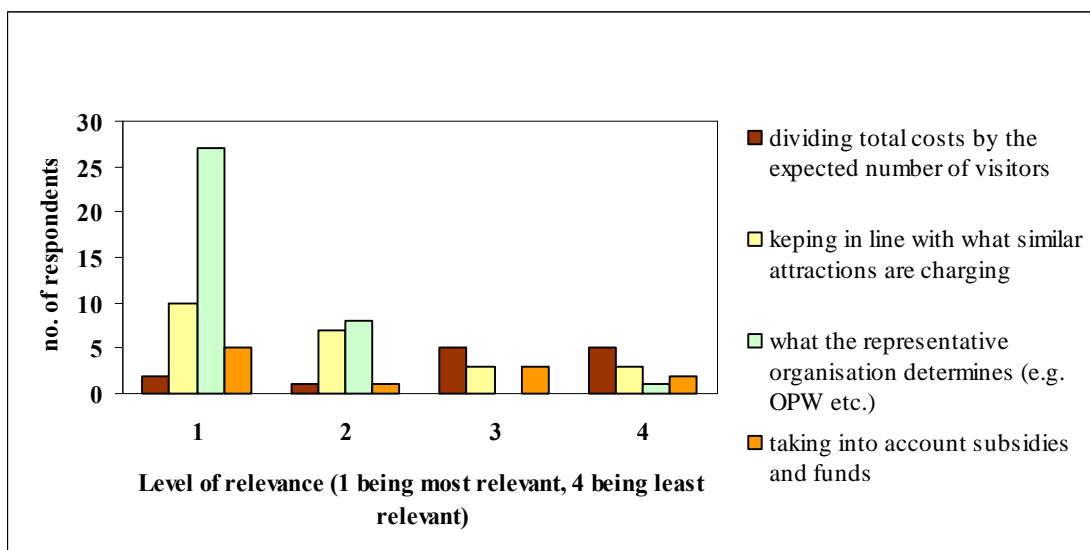


Figure A13: Method of setting admission price at state owned heritage attractions

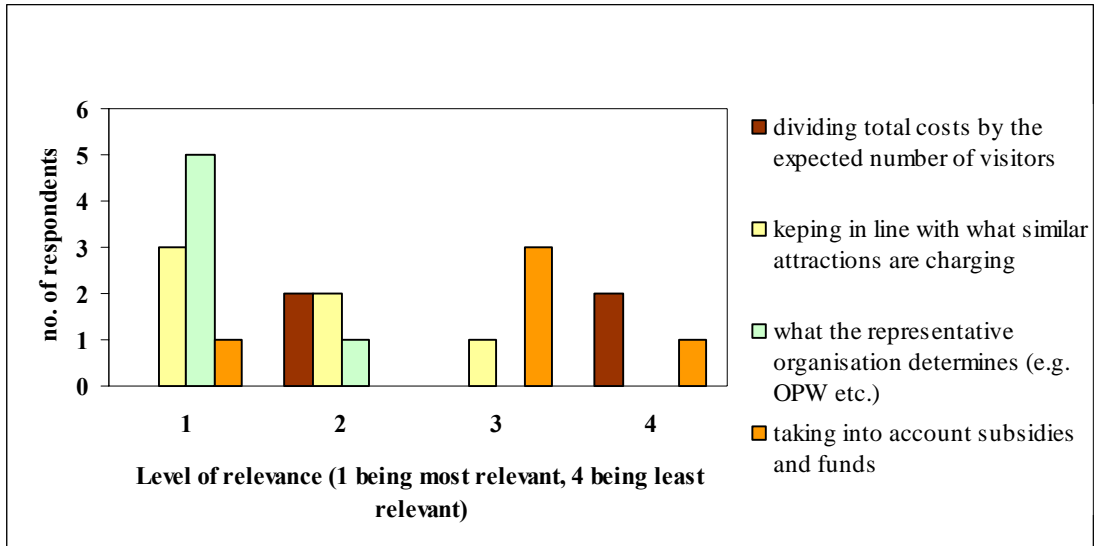


Figure A14: Method of setting admission price at charity/trust owned heritage attractions

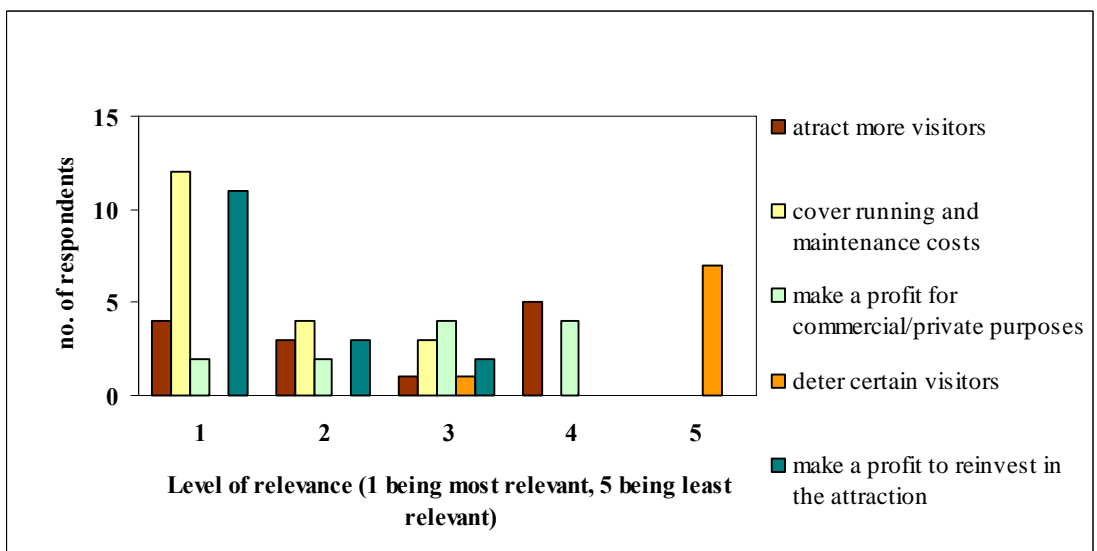


Figure A15: Purpose of admission price at privately owned heritage attractions

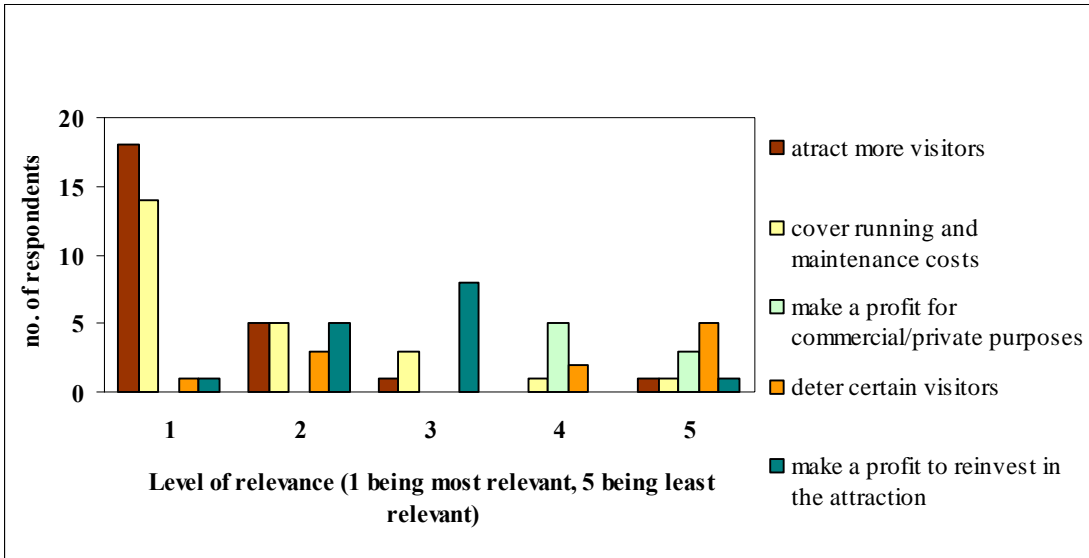


Figure A16: Purpose of admission price at state-owned heritage attractions

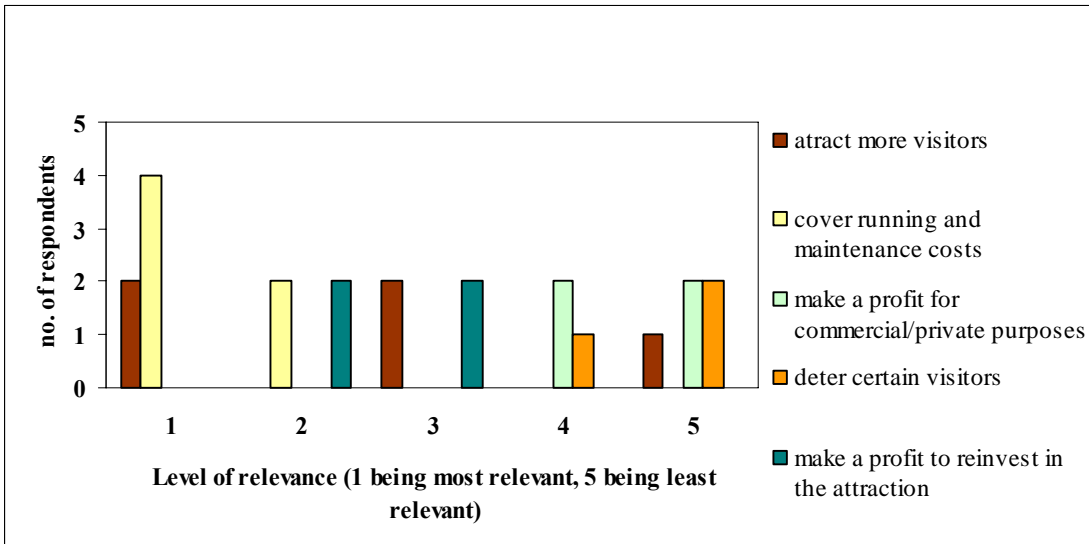


Figure A17: Purpose of admission price at charity/trust owned heritage attractions