

WESTPORT HOUSE

Economic Impact Study



- Report -

prepared on behalf of

Mayo County Council

by

CHL Consulting Company Ltd.

September, 2015



CHL CONSULTING Co. LTD.

Vers2/smcm/24.09.15

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Executive Summary

Westport House has been privately owned by the Browne Family for almost 400 years. It opened to the public in 1960, and since then the family has invested significantly in the estate in order to ensure that it continued trading as a leading tourism attraction, providing a changing and evolving range of tourism activities. This in turn has resulted in the saving of what is today considered to be one of Ireland's National Historic Treasures.

This assessment of economic impact has been commissioned by Mayo County Council in order to determine the significance of Westport House as an economic asset in the tourism industry in Mayo, and to quantify the value added to the local and regional economy. The principal conclusions presented in this report may be summarised as follows:

- 1) In terms of a direct contribution of economic value created, Westport House contributed almost €1.64 million to the Exchequer and the local/regional economy in the twelve months ending 30 September 2014.
- 2) In terms of economic value generated by Westport House, some €50.7 million (based on an on-site survey) will be spent in Mayo and the wider region by consumers visiting the House this year (this figure is separate to the expenditure these visitors make at Westport House itself). This estimate is based upon survey respondents' reported expenditure, and is limited to those respondents who stated that the House was the principal purpose for their visit to Mayo.
- 3) Economic activity on-site at Westport House directly employs 47.1 people (Full Time Equivalents). It is estimated, based upon Fáilte Ireland multipliers, that the expenditures associated with those that cite Westport House as the principal reason for their visit to Mayo, support a further 1,724 jobs elsewhere in the regional economy.
- 4) Based on Fáilte Ireland estimates of tax receipts accruing to the Exchequer through tourism activity, the €50.7 million referenced above (arising from tourism associated with Westport House) will yield an additional €12.4 million for the Exchequer.
- 5) Westport House is predominantly a domestic market family tourism product. Survey results indicate that some 84.4% of visitors to the House were Irish.

- 6) In an on-site survey, 60.9% of respondents reported that Westport House was their principal motivation for travelling to Mayo.
- 7) The product offering at Westport House aligns well with the wider national tourism policy agenda, and it serves as a prominent and significant adventure hub along the Wild Atlantic Way. As such, Westport House can expect to benefit from the continued domestic and international marketing of the *Wild Atlantic Way*.
- 8) Apart from its performance as an economic asset, Westport House is a cultural and heritage asset of national significance, and consequently the non-monetised value of the House and estate needs to be recognised in assessing the significance of the House to the life and economy of Mayo.
- 9) The House is also a significant contributor to the social and community life of Westport.

These points are further elaborated in the following sections of this document.

1. INTRODUCTION

1.1 Background

Westport House was built in 1730 by the 1st Earl of Altamont, John Browne, although it is believed that there has been a 'big house' on the site since the 1500s. The Browne family continue to own and manage the property, and this adds a distinctive feature to Westport House which is not only an historic property of note, but also the home of the Browne family for almost 300 years. As a result of this, the house and its contents in terms of portraits, antiques, furniture, papers and archives all tell the story of Mayo and Ireland for these three centuries.

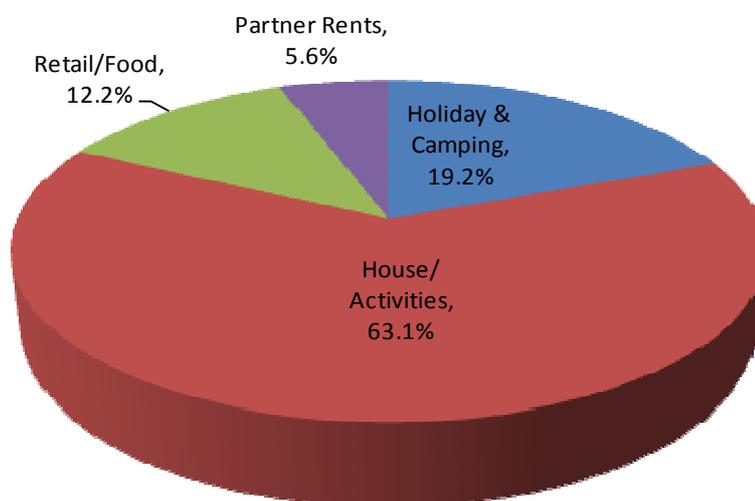
The house was opened to the public in 1960, and since that time a range of attractions and activities has been developed on the estate with a view to establishing Westport House as a tourism attraction with a particular focus on the family market. Over the fifty-five years since it opened to the public, the house and the tourism facilities developed on-site have been privately funded by the Browne family. Westport House is now undergoing some change arising from developments involving the transfer of ownership of the estate arising from the passing of Jeremy Browne 11th Marquess of Sligo in July 2014.

This Economic Impact Assessment has been commissioned by Mayo County Council in order to identify the economic contribution that Westport House makes to Westport, to County Mayo, and to the wider region. The results of the study will be used to inform the measures that need to be put in place to support the further development of Westport House as a tourism attraction.

1.2 Profile

Westport House has enjoyed considerable growth in recent years. The House had 162,000 paying customers in 2014 (up 82% on the 89,000 visitors in 2009) and generated a total of €1.8 million in turnover in the financial year ending 30/09/2014. In comparative terms, this performance places Westport House just on the edge of the top twenty fee-paying visitor attractions in the country. A breakdown of this turnover by activity type is presented in Figure 1 overleaf:

Figure 1: Westport House, Revenue Mix, 2014



Much of this growth can be attributed to significant product diversification and product innovation which has resulted in a range of new activities aimed primarily at the family market. This has involved new developments on the estate lands, which now complement the core tourism asset of the historic house itself. The principal products offered at Westport House and estate can be summarised as follows:

- Westport House & Grounds (including 6 permanent exhibitions including the recent famine exhibit)
- Pirate Adventure Park
- Caravan & Camping Park including Bell Tents for hire
- Adventure Activity Centre
- Westport Train Tour
- Outdoor events venue featuring Westport Festival and the Hooley at the House
- Special Events Calendar including Winter Wonderland, and Halloween Festival.

The product offering within the house has also been expanded (mainly through product innovation) and now includes a Christmas experience, afternoon tea at Westport House, group tours of the house, weddings, hen party functions, and photo-shoots. Further investment and development is under consideration, and projects under review include:

- Additional guest accommodation
- Large scale events

- Exclusive events at Westport House
- Expansion of the Grace O'Malley Experience for “Culturally Curious” visitors
- Greenway Connector initiative
- Increased investment in marketing and co-marketing opportunities.

While there has therefore been considerable activity relating to the expansion and re-positioning of the core product, there has not as yet been an equivalent concentration on the consumer profile which remains primarily focused on the domestic market. This is understandable given the immediate need in recent years to expand business in the “near market” (domestic), although the potential for international sales remains an area worth exploring in planning the next phase of business development at Westport House.

Some of this product innovation has involved the establishment of business partnerships with external service providers such as Adventure West and Adventure Islands. These companies operate respectively, the zorbing/zip-wire facilities and the adventure games activities on-site. As independent businesses, the companies bring their own specialist knowledge and expertise onto the Westport House estate, and as providers of separate outdoor activities in the Clew Bay area they connect the estate into this growing sector of tourism activity.

2. ALIGNMENT WITH TOURISM/ECONOMIC POLICY GOALS

2.1 National Tourism Policy

In March 2015, the government published a new tourism strategy entitled *People Place and Policy – Growing Tourism to 2025*. The overall goals of this strategy were set out as follows:

- By 2025, revenue from overseas visitors, excluding carrier receipts, will increase to €5 billion in real terms (i.e. excluding the effects of inflation).
- Employment in the tourism sector will be 250,000 by 2025, compared with around 200,000 at present.
- There will be 10 million visits to Ireland annually by 2025.

In expanding on these goals later in the document, the government underlined a clear focus on the importance of overseas tourism, yet sought to establish a balance between overseas and domestic tourism by stating that:

The Government's primary objective in tourism is to maximise the services export revenue of the sector, and therefore, this policy statement is centred on Ireland achieving its full potential as a destination for overseas tourism. However, it is recognised that the domestic tourism market underpins the range of visitor accommodation and services that provide competitive advantage to Ireland in the international market and many of the measures contained in this Statement will similarly benefit the domestic tourism sector.

It is notable that the document highlights the “visitor accommodation and services that provide competitive advantage to Ireland” and acknowledges that many of these service providers are in fact underpinned by a strong domestic market. Without this domestic market it is unlikely that some operators would survive and might not therefore be available to provide services and activities to overseas visitors when they arrive in Ireland. As a tourism service provider, Westport House aligns well with the strategic direction presented in the new policy. This alignment can be summarised in the following three points.

- 1) Westport House is a significant tourism sector employer and, as an employer with a clear focus on growing employment even further, it can expect therefore to participate in the programme of “human capital” development outlined in the strategy (p.42).

- 2) In focusing on the overseas market, reference is made in the policy document “to creating the desire to travel and meeting visitor expectations”. As a visitor attraction with potential to grow its overseas market, Westport House can expect to benefit from the marketing activity that will support this focus.

- 3) The new policy emphasises the benefits that accrue when local authorities and local communities work together. It states (p 61) that “local authorities will be encouraged to support communities in tourism development”. The tourism and business community in Westport have a strong history of working together with the local authority for the further tourism development of the town. Given the emphasis on the importance of such collaboration in the new tourism policy document, Westport House can expect to benefit from these continuing economic relationships.

2.2 Wild Atlantic Way

Given its central position on the *Wild Atlantic Way*, Westport House is an intrinsic element of one of the three major tourism propositions developed by Fáilte Ireland and marketed by Tourism Ireland. The *Wild Atlantic Way* (together with *Dublin City* and *Ireland's Ancient East*) is a central pillar in the programme of marketing and messaging directed at international consumers. Those consumers are in effect being prompted to think first of “Ireland's Atlantic coastline”, then think of Mayo, and then think Westport. Westport House therefore, in its own marketing and market positioning, can “ride this wave” and benefit from the elevated profile of Ireland's western coastline, and the enhanced consumer awareness of Mayo that this profile will generate.

Given the continuing evolution of the Achill Sound/Westport Greenway and the advent of the Clew Bay “Blueway”, Westport is now consolidating its reputation as a centre for activity based holidays. This aligns well with the growing activity and adventure cluster on the Westport House estate, and there should therefore be an equally growing opportunity to capture “crossover” consumers who may go kayaking in Clew Bay one day, cycling on the Greenway the next, and take in an adventure activity at Westport House the day after.

There is also a strong alignment with Westport House as a heritage property and attraction of considerable note in its own right. Prompted by a decline in visitor numbers to Ireland during the recent recession, a significant programme of research was undertaken by tourism stakeholders to identify those consumers – both at home and

abroad – who might be interested in the tourism experience Ireland can offer. This research underlined the need for Irish tourism to take a more narrow targeted approach to marketing, rather than a very broad and undifferentiated one. In other words, sell to those consumers who are known to be interested in Ireland, rather than attempting to sell to everybody (on the assumption that if the tourism industry is busy “selling to everybody” then it might be actually selling to nobody).

Arising from this initiative, current Irish tourism policy is now focused on selling to three distinct market segments, each of which are considered to be “warm” to the idea of a leisure break in Ireland. One of these groups has been labelled “The Culturally Curious” is comprised of consumers who are specifically interested in Ireland’s built heritage, its traditions, and its culture. These consumers tend to be a little older (50+), they are usually well-educated, and they are relatively more affluent than the average consumer visiting Ireland. Research shows that they are not interested in a superficial engagement. They expect a “heritage experience” that is entertaining, engaging (active, not passive), and immersive in that they wish to find out and experience as much as they can during their visit.

Westport House, with its layers of narrative – Grace O’Malley Pirate Queen, the Browne family, the Famine period and Letters of Lady Sligo, Jamaica and Slavery, and the development of Westport Town – has a strong asset base with which to engage the culturally curious tourist.

2.3 Things to See and Do

It is important also to understand the nature of the tourism services provided at Westport House. It has been suggested in the past that as an industry, tourism is comprised of two sub-set industries – that is “day time” tourism (10.00 to 19.00 hours) and “evening tourism” (19.00 to 10 hours). Ireland has traditionally had particular strengths in “evening tourism” which is dominated by the hospitality sector and the accommodation, food and drink sub-sectors in particular. Given traditional organisational and trade association structures in Irish tourism, these sub-sectors have typically been well organised and have possessed the resources to protect and promote their particular business interests.

By contrast, those involved in “day time” tourism, typically the smaller businesses providing access to things to see and do, have tended to be less well organised in terms of formal trade associations, and so perhaps lacked a degree of influence in the evolution

of tourism policy. Yet doing things, seeing things, and (increasingly) getting involved and active in things (experiences), is exactly why visitors come to Ireland. These are the factors that convert a vague interest in Ireland into a firm booking. These are also the factors that allow Ireland to “stand out” and distinguish itself in the noisy international tourism market place – these are the things that only Ireland can uniquely provide to visitors. To an increasing degree, accommodation cannot serve as a differentiating factor prompting consumers to choose one destination over another. This is why in *People, Place, and Policy – Growing Tourism to 2025*, reference is made to ““visitor services that provide competitive advantage to Ireland”. As the elements of the “evening time” tourism economy become more homogenised and commoditised, the potentially stronger and differentiating elements of the “day time” tourism economy come to the fore and represent a more compelling source of sustainable competitive advantage. Westport House and the services it provides to visitors make a significant contribution to this “day time” tourism economy.

In general therefore, Westport House aligns well with the objectives and priorities of Irish tourism. It currently serves an existing and growing domestic market and, given its position on the *Wild Atlantic Way*, it also has the potential to expand into warm market segments identified in recent tourism research.

3. ON-SITE SURVEY – INSIGHTS AND CONCLUSIONS

3.1 Survey Summary

In July 2015, CHL deployed a team on-site at Westport House to survey visitors and determine consumer attitudes to the House as a visitor attraction. The total survey sample size was 401 and, relative to the total annual population of visitors to Westport House this means that the survey results can be interpreted with a margin of error of 4.9% at a 95% level of confidence. The top eleven “take out” messages from the survey were as follows:

- 1) Westport House is predominantly a domestic tourism product. 84.4% of respondents were Irish. The next three highest nationality groupings were USA (4.3%), UK (3.3%) and France 2.5%).
- 2) In terms of county of residence, the top five respondents represented 43% of the total – Mayo (12.8%), Galway (9.9%), Dublin (7.8%), Cork (7.8%), and Antrim (4.7%).
- 3) Westport House is primarily a family-focused tourism product. In terms of party type, 83.5% of respondents indicated that they were visiting the House “with family”.
- 4) Westport House is a driver of visitors to Westport/Mayo. When asked to respond on a scale of 1-5 (where 1 = not important and 5 = main reason for visit), 60.9% of respondents said that Westport House was the main reason for their visit to the area.
- 5) Westport House keeps visitors in the Westport/Mayo area. When asked if they were on a day-trip, 77.7% of visitors said “No”. Of these visitors who were not on a day-trip, 19.6% were staying on-site at Westport House, 40.6% were staying in Westport Town, and 30.4% were staying elsewhere in Mayo.
- 6) Visitors to Westport House have a significant length of stay in Mayo. 29.3% of respondents indicated that they were staying in Mayo for three nights. The next highest grouping (20.7%) indicated that they were staying in Mayo for seven nights. Overall, of those surveyed at Westport House, 76.1% indicated that they were staying in Mayo for between three and seven nights. This dwell-time in the county is particularly significant in terms of the opportunities for tourism and other businesses in the county to capture tourist expenditures.

- 7) In terms of the aspects of Westport House experienced, 89.7% of visitors toured the House, 85.1% visited the Pirate Adventure, and 74.9% took the train ride. (This was a multi-answered question and so counts those who engaged in multiple activities while at Westport House).
- 8) In terms of age cohort, the highest grouping (56.1%) were aged between 35-44 years. Only 3.4% were aged between 18-24 years and only 4.2% were aged 65+ years. This finding tends to confirm the strong family orientation of Westport House as a tourist attraction.
- 9) In terms of expenditure, (apart from spending at Westport House), day-trippers responded that they had on average spent €77.12 on items such as transport, food & drink, shopping, entertainment, and other. The most common party size (19.8%) was five people. Asked the same question, those staying in Westport/Mayo/Elsewhere indicated that they had on average spent €897.89. The most common party size in this instance (34.6%) was four persons.
- 10) In terms of their experience at Westport House, 72.5% of visitors rated the facilities on-site as “very good”. A further 23.8% rated them as “good”. In relation to customer service, 77.0% of visitors rated it as “very good” and a further 21.7% rated it as “good”. In terms of value for money, 43.4% of visitors rated it as “very good” and a further 39.5% rated it as “good”. A total of 17.1% of visitors rated value for money as being either adequate, poor, or very poor.
- 11) Finally, when asked if they would recommend a visit to Westport House to their friends, 98.4% of respondents indicated that they would.

4. DIRECT AND INDIRECT ECONOMIC IMPACT

4.1 Methodology

The tourism impact of an attraction is the result of the interaction between the number of visitors to the location, their origin, and their length of stay at the attraction in question. The origin of visitors (whether from Ireland or out-of-State) allows an assessment to be made of what those visitors spent during their visit, whether that was as an overnight visitor or as a day-tripper.

In addition to admission charges and other on-site expenditure at Westport House, expenditure by day-trippers and out-of-State visitors on travel, food and accommodation results in additional revenue for the wider Mayo region, and also for the state in the case of non-resident visitors. Tax contributions to the exchequer and local authority revenues are also significant, and Westport House has provided details regarding VAT, payroll taxes and rates payments for inclusion in this impact assessment. Fáilte Ireland estimates suggest that 24.5% of visitor expenditure ultimately accrues to the State as taxes. This tax multiplier of 0.245 is therefore applied to expenditures associated with Westport House in order to estimate the approximate tax yield to the exchequer.

Employment at Westport House is comprised of full-time and seasonal staff. Data on staffing patterns have been provided by Westport House and accordingly full-time equivalents (FTEs) have been calculated for part-time staff based on the number of days the House was open in 2014. In addition it must be remembered that visitor expenditure, and expenditure by the House itself, supports employment in the supply chain along which the House conducts its business. Recent estimates from Fáilte Ireland (*Tourism Facts: May 2015*) suggest that every €1 million helps to support 34 tourism jobs. These estimates are used in assessing the wider employment benefits of Westport House. Nevertheless full-time job equivalents are considered to be the most accurate reflection of employment supported by the attraction as the relationship above is not as direct as 34 jobs being specifically created by every €1 million of expenditure. Some positions are part-time or seasonal and so calculating employment by first establishing the number of employment hours is the approach taken in this report.

There are two main sources of revenue associated with Westport House: expenditure by the visitors themselves (both in and outside attraction) and expenditure generated by Westport House itself. Both these expenditure streams end up as revenues for an array of different business entities in the wider region, and so are key to understanding the final economic impact of the House.

However a focus on direct expenditure only, tends to understate the overall economic impact of an individual facility or attraction. To avoid this understatement, economic impact is conventionally measured on the basis of three variables as follows:

- 1) Direct Expenditures: result from owners/operators of the tourism attraction purchasing inputs from suppliers along their own business supply chain.
- 2) Indirect Expenditures: result from expenditures made by visitors (and correspondingly the revenues earned by operators) as a result of the visit made by those visitors to a particular tourism attraction
- 3) Induced Impacts: result from employees of the tourism attraction, and employees in the supply chain, purchasing goods and services as a consequence of the wages earned in the tourism attraction, and transactions associated with the tourism attraction in the supply chain.

This methodology usually involves the use of national Input/Output Tables and associated Multipliers produced and published by the Central Statistics Office (CSO). However because these statistics are developed at a national level, their use is really only appropriate at national level, and using them at county level can produce distorted results. For these reasons, the methodology adopted in this assessment has avoided the use of national level multipliers, and has focused instead on the first two measures above using data provided by Westport House and data gathered in the on-site survey summarised in the previous chapter. The results of this analysis are presented in the following section.

4.2 Expenditure Analysis

The economic assessment presented in this report draws upon both survey data gathered on site and information relating to the business activity of Westport House contained in financial statements prepared for the financial year ending 30 September

2014. Westport House welcomed almost 162,000 paying guests in the financial year ending 30/09/2014. An analysis of these guests by category is set out in Table 4.1 below:

Table 4.1: Distribution of Visitors (By Category)

Category	Number	%
Locals	19,311	11.93
Day-Trippers	34,908	21.56
Caravan & Camping	13,361	8.25
Westport/Mayo/Elsewhere	94,326	58.26
Total	161,906	100.00

Using survey data collected on-site, this visitor mix is then used to multiply out daily spend profiles reported by respondents when asked to estimate their daily expenditure (apart from expenditure at Westport House). No value is attributed to expenditure reported by locals visiting the facility as this is not incremental value added to the local economy. Total procurement expenditure on goods and services for y/e 30/09/2014 was €653,000. The main value added therefore is associated with expenditures made by day-trippers, caravan and camping guests, and visitors staying overnight either in Westport, Mayo, or the region. The “weighting” column factors in the reported and/or weighted average lengths of stay for the latter two categories. The results are presented in Table 4.2 below:

**Table 4.2: Total Expenditure by Visitors
(Apart from Expenditure at Westport House)**

Category	Number	Daily Spend (€)	Weighting	Total (€)
Locals	19,311	0.00	0	0
Day-Trippers	34,908	14.39	1.00	502326
Caravan & Camping	13,361	57.85	2.27	1,754,560
Westport/Mayo/Elsewhere	94,326	193.52	4.44	81,047,613
Total	161,906			83,304.499

This analysis suggests that, during their leisure break some €83.3 million is spent by visitors to Westport House, outside of any expenditure which might be made on-site at Westport House itself. The survey results indicate that 60.9% of visitors, when asked how important Westport House was in planning their visit, reported that it was the “main reason for their visit”. When the gross figure of €83.3 million is adjusted downward to reflect the fact that not all visitors identified Westport House as the main purpose of their visit (but 60.9% did) a revised figure €50.7 million can be calculated. This then is the

measure of economic value which can be properly attributed to Westport House as the principal causal factor. Not all this revenue is captured in Westport, but in aggregate it is captured in Westport, Mayo, and the wider region. In other words, if Westport House did not exist, this economic value would not be generated and captured in Westport and the wider region.

4.3 Taxation

Table 4.3 details the amount remitted directly by Westport House to the Exchequer in the financial year ending 30 September 2014.

Table 4.3: Taxation

Tax	(€)
Payroll Taxes	157,165
VAT	72,884
Business Rates	26,655
Total	€256,704

4.4 Employment

The total wage bill at Westport House for the financial year ending 30 September 2014 was €733,515. The total number employed on-site is set out in Table 4.3 below. This includes those directly employed by Westport House as well as those employed by the two outsourced activity providers (Adventure West and Adventure Islands). Employment at Gracie's Bar and Restaurant which operates on-site (but whose staff are not employed by Westport House) is also included.

Table 4.4: Employment at Westport House

Employer	Employment Type	Number	FTE
Westport House	Full-Time	9	9.0
Westport House	Part-Time (all year)	4	2.4
Westport House	Seasonal (Summer)	70	20.4
Westport House	Seasonal (Christmas)	30	2.5
	Sub-Total	113	34.3
Gracie's Bar & Restaurant	Seasonal (summer)	19	5.5
Operators: Adventure West & Adventure Islands	Seasonal (summer)	25	7.3
Total			47.1

4.5 Procurement

In terms of the procurement of goods and services from suppliers, Westport House spent €653,000 in the financial year ending 30th September 2015. This is expenditure which for the most part went back into the Westport and regional economy. Table 4.5 below aggregates the direct spending made by Westport House on wages, taxation, and procurement.

**Table 4.5: Direct Spending by Westport House
(Year Ending 30 September 2015)**

Spending Category	(€)
Taxation	256,704
Wages	733,515
Procurement	653,000
Total	1,643,219

This represents the economic stimulus provided to the Exchequer and directly to the local economy as a result of the trading activity undertaken at Westport House.

5. SOCIAL AND CULTURAL CONTRIBUTION

5.1 Heritage Significance of Westport House

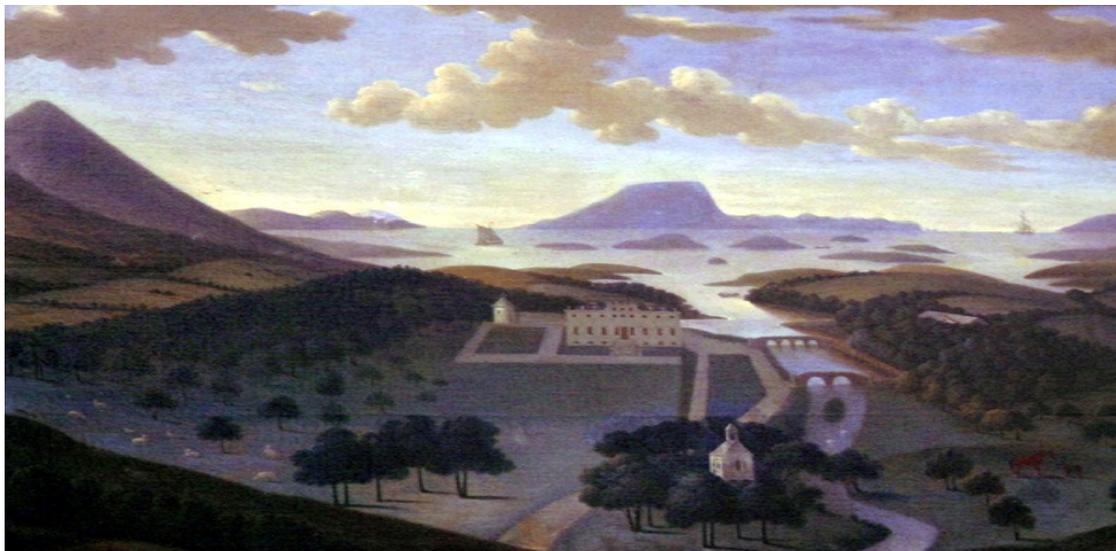
The quantification of economic value associated with, and generated by, Westport House is important, and is the principal focus of this study. There are however other important social and cultural aspects of Westport House which cannot be quantified in monetary terms but which are nevertheless significant both for the tourism industry, and for Ireland's national heritage. It is important therefore that these matters should not be overlooked in this report. Accordingly, a brief summary of some of these points is presented in the following paragraphs.

The Browne's of Westport were introduced to Ireland by John Browne who arrived from Sussex in 1580. In 1669 his great grandson John III married Maud Burke the great great granddaughter of Grace "Granuaile" O'Malley. John Browne III had purchased lands around Mayo, part of which included the ruins of an O'Malley tower house at Westport and it was on these foundations he set about building the first Westport House in 1650. In 1730, the present Westport House was built by John III's Grandson, another John, 1st Earl of Altamont, to a design (1730) by Richard Cassells (aka Castle).

An important aspect of Westport House today is its enduring capacity to tell the social history and the stories of the last three hundred years, as seen through the prism of one of Ireland's great estate houses. One example of this is the opportunity to appreciate the art and craftsmanship of generations of Irish people who produced many of the artefacts now on display at the House. This is summarised by the National Inventory of Architectural Heritage as follows:

"Westport House is important in illustrating the artistic capabilities of the craftsmen of the eighteenth and nineteenth centuries. The delicate Adamesque plasterwork designed by James Wyatt in the dining room is regarded as being among the best examples of his work surviving in Ireland. Many of the original contents of the house survive and offer a comprehensive insight into the evolution of the house over succeeding generations. Fine examples of Irish craftsmanship including furniture, paintings and other artefacts can be seen. Among the paintings are portraits by Sir Joshua Reynolds and Sir William Beechey. A series of landscape paintings by James Arthur O'Connor include images of the house, the fisheries, and the surrounding landscape. Works by other artists such as

Barrett, Brooks, Chalon, Gibson, Lavery and Opie form part of the impressive art collection”.



Source: A painting (1760) of Westport House by George Moore. Tree plantations to the north and south, and pathways parallel to the river define the landscape with views of Croagh Patrick, Clew Bay and Clare Island. The church visible in the foreground and the stable block are also attributed to Castle © Westport House.

The importance of culture and heritage as a driver of tourism activity has been noted previously. This is true of both domestic and overseas tourists. Thus while these aspects of our national heritage are properly valued in and of themselves, they also generate economic gains in the local economy, because those interested in that heritage will travel some distance to see and appreciate features which are unique to a particular location. In that event, the hospitality industry in that location (hotels, restaurants, and bars) will unavoidably be a beneficiary of the expenditures made by those who are prompted to travel by their interest in heritage.

5.2 Social Context

Westport House is of course closely connected to Westport town. The town was first mapped out and designed by the Browne family, and accordingly both the house and the town share a common Georgian heritage. Many of the streets in Westport today are named after Browne family members such as Peter Street, James Street, Altamont Street and John's Row. They also established the theatre at the Octagon, built the town of Louisburgh, the protestant Church in Westport, and ensured the railway line came all the

way to Westport. The development of the Harbour and Quay in the 18th and 19th century was also driven by the Brownes, not to mention the building of the first Hotel in Westport (then Robinsons, now The Railway Hotel) in the 19th century, recognizing from very early on the need for tourist accommodation. The lay-out, streetscapes and public realm of Westport are a primary reason for the success of the town as a tourist destination in recent decades.

Both residents and visitors enjoy use of the grounds of the estate, and Westport House has over the years also facilitated significant infrastructural projects in the development of the town. Projects facilitated through the transfer of lands from Westport House include, a sewerage treatment plant, golf course development, tennis club, skate/leisure park, and Westport Quay development. Most recently, an extension of the Greenway has been facilitated by allowing access through Westport House woods.

In addition therefore to its development as a tourism attraction over the past fifty-five years, Westport House has for a considerably longer period played an active part in the development of the town itself.

6. APPENDICES

Appendix 1:

Westport House – Visitor Survey Results

A1. WESTPORT HOUSE – VISITOR SURVEY RESULTS

GENERAL PROFILE

Q1: Nationality (100% response rate to this question (401 respondents))

Q2: Residence (100% response rate to this question (401 respondents))

Country of Nationality	No. of Respondents	Total %	Country of Residence	No. of Respondents	Total %
Ireland	339	84.5%	Ireland – South	282	70.3%
USA	17	4.2%	Ireland – North	66	16.5%
UK	13	3.2%	USA	18	4.5%
France	10	2.5%	France	8	2.0%
India	2	0.5%	UK	10	2.5%
Belgium	2	0.5%	Spain	3	0.7%
Australia	2	0.5%	Australia	2	0.5%
Spain	2	0.5%	Belgium	2	0.5%
Holland	1	0.2%	Canada	2	0.5%
Malaysia	1	0.2%	Mauritius	1	0.2%
Austria	1	0.2%	Austria	1	0.2%
Norway	1	0.2%	Norway	1	0.2%
South Africa	1	0.2%	Poland	1	0.2%
Russia	1	0.2%	Switzerland	1	0.2%
Thailand	1	0.2%	Italy	1	0.2%
Poland	1	0.2%	Germany	1	0.2%
Switzerland	1	0.2%	Brazil	1	0.2%
Italy	1	0.2%			
Canada	1	0.2%			
Germany	1	0.2%			
Brazil	1	0.2%			
Wales	1	0.2%			

Q3: County of Residence, if Irish residents

(98.9% response rate to this question (344 respondents))

County	No. of Respondents	Total %	County	No. of Respondents	Total %
Mayo	44	12.8%	Monaghan	8	2.3%
Galway	34	9.9%	Fermanagh	7	2.0%
Dublin	27	7.8%	Sligo	7	2.0%
Cork	27	7.8%	Limerick	7	2.0%
Antrim	16	4.7%	Wicklow	6	1.7%
Meath	15	4.4%	Laois	5	1.5%
Tyrone	14	4.1%	Waterford	5	1.5%
Donegal	12	3.5%	Kilkenny	4	1.2%
Down	11	3.2%	Longford	4	1.2%
Cavan	11	3.2%	Clare	4	1.2%
Tipperary	11	3.2%	Offaly	4	1.2%
Kildare	11	3.2%	Westmeath	3	0.9%
Wexford	10	2.9%	Carlow	3	0.9%
Armagh	9	2.6%	Roscommon	3	0.9%
Derry	9	2.6%	Kerry	3	0.9%
Louth	8	2.3%	Leitrim	2	0.6%

Q4: Age Group (96.0% response rate to this question (385 respondents))

Age Group	No. of Respondents	Total %
18-24 years	13	3.4%
25-34 years	59	15.3%
35-44 years	216	56.1%
45-54 years	60	15.6%
55-64 years	21	5.5%
65+ years	16	4.2%

Q5: Sex (94.8% response rate to this question (380 respondents))

Sex	No. of Respondents	Total %
Male	152	40.0%
Female	228	60.0%

Q6: Party Type (99.8% response rate to this question (400 respondents))

Party Type	No. of Respondents	Total %
Alone	0	0.0%
Couple	20	5.0%
With Family	334	83.5%
With Friends	20	5.0%
Other Adult Group	26	6.5%

TRIP SPECIFICS

For non-Mayo residents only (357 respondents)

Q7: What is your main purpose for being in Mayo at the moment?

(97.8% response rate to this question (349 respondents))

Main Purpose	No. of Respondents	Total %
Holiday	327	94.8%
Business	3	0.9%
Study	1	0.3%
Visit Friends/Relatives	7	2.0%
A Festival/Event	0	0.0%
Visit Westport House	7	2.0%

Q8: On a scale of 1-5, how important is Westport House in your decision to visit Westport/Mayo, where 1 = not important and 5 = main reason for visit?

(97.8% response rate to this question (349 respondents))

Scale	No. of Respondents	Total %
1 – not important	17	5.2%
2	74	22.4%
3	18	5.5%
4	20	6.1%
5 – main reason for visit	201	60.9%

Q9: Are you on a day-trip

(100% response rate to this question (357 respondents))

	No. of Respondents	Total %
Yes	81	22.7%
No	276	77.7%

Non Day Trip Total (276 respondents)

Q10: If not on a day-trip, where are you staying?

100% response rate to this question (276 respondents)

Staying..	No. of Respondents	Total %
On site here at Westport House	54	19.6%
In Westport Town	112	40.6%
Elsewhere	110	39.9%
<i>Elsewhere in Co. Mayo</i>	84	76.4%
<i>Elsewhere in Co. Galway</i>	9	8.2%
<i>Elsewhere in Co. Sligo</i>	2	1.8%
<i>Elsewhere in Co. Leitrim</i>	1	0.9%
<i>Elsewhere not Stated</i>	14	12.7%

Q11: For how many nights are you staying in Mayo?

100% response rate to this question (276 respondents)

No. Nights	No. of Respondents	Total %
1	3	1.1%
2	47	17.0%
3	81	29.3%
4	39	14.1%
5	22	8.0%
6	11	4.0%
7	57	20.7%
8	1	0.4%
9	2	0.7%
11	1	0.4%
12	2	0.7%
14	5	1.8%
22	1	0.4%
1 month	3	1.1%
2 months	1	0.4%

Q12: In what type of accommodation are you staying?

100% response rate to this question (276 respondents)

Type of Accommodation	No. of Respondents	Total %
Self-Catering	71	25.7%
Bed & Breakfast	7	2.5%
Guesthouse	0	0.0%
Hotel	127	46.0%
Friends/Relatives	15	5.4%
Camping	55	19.9%
Other not Stated	1	0.4%

SITE SPECIFICS (All 401 respondents)

Q13: Is this your first visit to Westport House? 99.8% response rate to this question (400 respondents)

	No. of Respondents	Total %
Yes	225	56.3%
No	175	43.8%

Non First Visit Total (175 respondents)

Q14: If not your first visit, how many times have you visited in the last 3 years? 72% response rate to this question (126 respondents)

Number of Visits	No. of Respondents	Total %
1	45	35.7%
2	37	29.4%
3	28	22.2%
4	5	4.0%
5	1	0.8%
7	2	1.6%
8	1	0.8%
10	2	1.6%
20	1	1.6%
60	2	0.8%
50	1	0.8%
100	1	0.8%

(All 401 respondents)

Q15: With regard to your visit here today, what aspects of Westport House have you experienced? This was a multi-answered question.
97.3% response rate to this question (390 respondents)

Aspects Experienced	No. of Respondents	Total %
Toured the House	350	89.7%
Visited the Pirate Adventure ¹	332	85.1%
Visited the Adventure Activity Centre ²	104	26.7%
Taken a Train Ride	292	74.9%
Gone on the Carousel	8	2.1%
Walked the Gardens	72	18.5%

¹ Pirate Adventure includes go-karting, slides, swans, train, bouncing castle, Cannon ball slide, playground.

² Adventure Activity includes zorbing, zip-wire, archery.

EXPENDITURE

For non-Mayo residents only (357 respondents)

Category of Expenditure (99.7% response rate to this question (356 respondents))

Category	No. of Respondents	Total %
Day Trip	81	22.8%
Staying on Caravan and Camping Park	56	15.7%
Staying in Westport/Mayo elsewhere	219	61.5%

DAY-TRIP EXPENDITURE (81 respondents)

Q16: For those on a day-trip, approximately how much have you spent, apart from your visit to Westport House, in the following expenditure categories? (96.3% response rate to this question (78 respondents))

	Total €	Average €
Transport (incl. fuel)	2,238	28.69
Food and Drink	2,929	37.55
Shopping	575	7.37
Entertainment	273	3.50
Total	€6,015	€77.12

How many people did this cover? (78 respondents)

No. of People	No. of Respondents	Total %
5 people	16	19.8%
4 people	15	18.5%
2 people	12	14.8%
3 people	9	11.1%
6 people	7	8.6%
1 person	3	3.7%
8 people	3	3.7%
9 people	3	3.7%
13 people	3	3.7%
11 people	2	2.5%
7 people	1	1.2%
12 people	1	1.2%
16 people	1	1.2%
17 people	1	1.2%
18 people	1	1.2%

VISITORS ON CARAVAN AND CAMPING PARK EXPENDITURE (56 respondents)

Q17: For those staying on the caravan and camping park, approximately how much have you spent, apart from your visit to Westport House, in the following expenditure categories?

(100% response rate to this question - 56 respondents)

	Total €	Average €
Transport (incl. fuel)	4,275	76.34
Food and Drink	8,887	158.70
Shopping	728	13.00
Entertainment	283	5.05
Total	€14,173	€253.09

How many people did this cover? (56 respondents)

No. People	No. of Respondents	Total %
5	23	41.1%
4	17	30.4%
6	6	10.7%
3	6	10.7%
2	4	7.1%

VISITORS STAYING IN WESTPORT/MAYO/ELSEWHERE EXPENDITURE

(219 respondents)

Q18: For those staying in Westport/Mayo/Elsewhere, approximately how much have you spent, apart from your visit to Westport House, in the following expenditure categories?
(96.3% response rate to this question - 211 respondents)

	Total €	Average €
Accommodation	113,705	538.89
Transport (incl. fuel)	17,430	82.61
Food and Drink	49,545	234.81
Shopping	6,025	28.55
Entertainment	2,750	13.03
Total	€189,455	€897.89

How many people did this cover?

(211 respondents)

No. People	No. of Respondents	Total %
4	73	34.6%
5	39	18.5%
2	29	13.7%
3	22	10.4%
6	21	10.0%
8	8	3.8%
7	6	2.8%
9	5	2.4%
11	3	1.4%
1	1	0.5%
10	1	0.5%
12	1	0.5%
15	1	0.5%
20	1	0.5%

CLOSING (All 401 respondents)

Q19: How did you hear about Westport House? (97.0% response rate to this question - 389 respondents). This was a multi-answered question.

	No. of Respondents	Total %
Social media – Facebook	17	4.4%
Website/Internet	77	19.8%
Word of Mouth/recommendation/family & friends	180	46.3%
Advertisement in newspaper/magazine/deals/promotions	28	7.2%
Tourist Office	6	1.5%
Travel/tourist guide	37	9.5%
Radio & TV	13	3.3%
Previous knowledge	123	31.6%

Q20: How would you rate your experience at Westport House today?

Facilities (96.3% response rate to this question - 386 respondents)

Facilities	No. of Respondents	Total %
Very Good	280	72.5%
Good	92	23.8%
Adequate	12	3.1%
Poor	2	0.5%
Very Poor	0	0

Customer Service (97.5% response rate to this question - 391 respondents)

Customer Service	No. of Respondents	Total %
Very Good	301	77.0%
Good	85	21.7%
Adequate	4	1.0%
Poor	1	0.3%
Very Poor	0	0

Value for Money (94.8% response rate to this question - 380 respondents)

Value for Money	No. of Respondents	Total %
Very Good	165	43.4%
Good	150	39.5%
Adequate	54	14.2%
Poor	9	2.4%
Very Poor	2	0.5%

Q21: Any other comments?

(77.6% response rate to this question - 311 respondents)

Facilities	No. of Respondents	Total %
Yes	311	77.6%
No	90	22.4%

See list of comments by category below.

Q22: Finally, would you recommend a visit to Westport House to your friends?

(94.8% response rate to this question - 380 respondents)

Facilities	No. of Respondents	Total %
Yes	374	98.4%
No	3	0.8%
Maybe/Not Sure	3	0.8%

Q21: Open Ended Questions – Results by Category

Value for Money

	No. of Respondents
All positive: really enjoyable, fantastic day out, new rides are great, great value for money, loads to do, very enjoyable, clean, lovely, would recommend to anybody. Perfect for families and something for all ages, would come back; lovely place to spend the day, better than expected; child and family friendly	103 respondents
Expensive: as entry ticket (€60) is not on an all-inclusive basis , there are lots of other extra charges included which aren't made clear, making it a very expensive day out. Make it an all-inclusive one off entry price; 3 sets of prices is too much and all adds up when bringing a family. Would come more often if wasn't so expensive; not good value; adult price expensive	52 respondents
Feels is better value for children aged 5-7 yrs , rather than 2-4 yrs; not every much to do for a very young child – definitely more suitable for older kids; not great value for younger kids.	7 respondents
Is no senior citizens reduction ; feel there should be one.	5 respondents
Could have come earlier if realized there was so much to do; Should have reduced rate for people arriving later in the day , shouldn't have to pay €60	4 respondents
Food and drink on site is very expensive (e.g. minerals should be €1.20 - €1.50, not €2)	4 respondents
The Living Social deal was very good (€29 for a family day pass, normally €60); should do it again; 2 for 1 voucher good too	3 respondents
Fast pass needed	2 respondents
Have an annual ticket which is good value. Downside is the limited use over the winter and lack of indoor activities.	2 respondents
Combined camping and Westport House ticket is good	1 respondent
Land train is expensive when you have a season ticket	1 respondent

Queuing

	No. of Respondents
Queues taking too long , queuing for more than 30 mins at ticket desk and at some attractions	21 respondents
Queues move fairly quick	4 respondents
Tell people who are going to house only not to queue	1 respondent

Access, Signage and On Site Facilities

	No. of Respondents
More picnic areas and benches/seating needed throughout the park; make picnic tables more weather dependent (e.g., canvas cover over).	14 respondents
Very confused about where to go once are on site ; signposting is not great; not enough greeting/meeting people; no signs to tell you where zip wire was.	4 respondents
Road signs from Westport and Newport to the park are not great, ended up in the caravan park by mistake, no assistance given to get to other car park; better clearer signage needed for car parks	4 respondents
Wheelchair access is not great on site; is a lot of walking to do for older people. option of automated buggies would be good. no ramps for buggies	3 respondents
Visually impaired patrons found it hard to connect with signs – need to be more tactile	1 respondent
Really good for elderly – no parking restrictions and could wait in car nearby	1 respondent
Good signage on site	1 respondent

Attractions and Activities

	No. of Respondents
Was misinformed/was not obvious/confused about prices and unsuitability of some activities for children (e.g. zorbing, zipwire, gocarts, height and weight restrictions). Didn't like the extra costs for these (carousel too). Should be all included or discounted.	26 respondents
Too many restrictions for young children ; introduce more suitable activities for younger children (e.g. small animals, more playgrounds). Also life jackets don't fit very small children for use on the swans.	23 respondents
Great for families, rides are good as kids can go on them on own; lot geared to younger children; play area and sand pit good	13 respondents
Need to have more indoor activities for wet days, especially for smaller children (e.g. indoor pool)	5 respondents
Need more activities for older children and teenagers , expand rides to cater for them too	5 respondents
Disappointed in the zoo and that it has gone; would like animals	3 respondents
More like an adventure park	1 respondent

IT Issues

	No. of Respondents
Great website	1 respondent
Website is confusing – too many options	1 respondent

House and Gardens

	No. of Respondents
Loved the house , interesting and well preserved; contents are beautiful, information provided on the house is excellent – e.g. Article Room and information on family; very child friendly.	25 respondents
Beautiful grounds and gardens , well maintained, nice walks	10 respondents
Would have liked to see more audio visual and interactive elements so could see more of the story – like that found in Kylemore Abbey. Is lots of reading but it is well done.; found dungeons element unusual in its appeal to kids	5 respondents
Very run down house , no up keep, disappointed with the condition of the inside of the house, wasn't impressive	3 respondents
Would have liked a tour of the house, the audio guide was very good.	2 respondents
The modern elements in the house are out of place	1 respondent
Would like to see more information stands throughout the house – was one in the drawing room and would like to see in other rooms too	1 respondent
Lots of visitors to the house, how is the wooden floor not damaged?	1 respondent
House inaccessible to people with disabilities	1 respondent
Wax works are very good	1 respondent

Campsite

	No. of Respondents
Caravan park was great , very comfortable; very clean, quiet and geared for kids,	12 respondents
Campsite bathrooms and shower block need to be upgraded ; luke warm water only	7 respondents
Found the campsite a little dearer than other ones have been too.	4 respondents
Would like if cooking and clothes washing facilities were provided	4 respondent
Camping bathrooms are very good .	3 respondents
Would like it if there was a shop facility on the campsite for purchasing bread and milk and other things like charcoal for BBQ, adaptors for generators.	3 respondents
Campsite curfew is not enforced, more security on campsite needed; better lighting at night	3 respondents
Did not know about the camping	2 respondents
More indoor facilities/activity area and seating area in campsite for when raining	2 respondents
More power outlets needed	1 respondent

Organisation and Management

	No. of Respondents
Staff throughout are excellent , staff friendly, helpful, kind, patient and well trained; train conductor was good with children, excellent customer service	21 respondents
Not enough staff and supervision around the site (at check-in, zipline, counter at House and in café; more staff needed in under 3's area; more staff needed in zorbing)	9 respondents
Too many young staff – friendly but inexperienced; need mature manager onsite to address issues; more leadership	5 respondents
Kids shouldn't be allowed to come to park without their parents	2 respondents
Health screen forms could be emailed to group leaders before trip	1 respondent
Would like to have a brochure for self guided tour of the house	1 respondent
Potential for more safety - safety at the water side an issue	1 respondent
Should give people staying on the campsite a wrist band	1 respondent

Other

	No. of Respondents
Not enough healthy eating options for children ; would like eating area to be monitored and cleared more often, gets grubby; Café – poor – no bread @ 3pm; no ice cream; coffee not good; slow service	9 respondents
Good toilet and changing facilities	4 respondents
Best to come early in the morning; earlier opening hours ; opening hours not on brochure	3 respondents
Food excellent in café	3 respondents
Some ground work needed , more bins on site	2 respondents
Discount voucher from hotel / apartments	2 respondents
Couldn't log into the wifi – hard for kids tablets and reception for TV is bad too	2 respondents
Smoking area needed	1 respondent
No ATM/Credit card machine on site	1 respondent
Free parking is good	1 respondent
No children so not here for activities	1 respondent
Home grown family business	1 respondent
No green bins on site	1 respondent
Unaware of closing at 6pm	1 respondent
Food exhibition being held there in Sept but no information on it anywhere.	1 respondent



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