

Visitor Attitudes Survey - Main Markets 2014

41112938/MR



Introduction & Overview

- The Visitor Attitudes Port study focuses on departing overseas holiday visitors.
- Interviewing is carried out at each of the major air and sea ports throughout the Republic.
- **AIRPORTS** - Dublin, Cork and Shannon
- **SEAPORTS** - Dublin, Dunlaoighre, Rosslare and Cork
- The achieved sample in 2014 was 1471 interviews with overseas holidaymakers.
- Quotas were set to ensure that the sample represents the main markets namely, British, Mainland Europe and transatlantic holidaymakers
- Fieldwork was conducted from June to October 2014

- Respondents are interviewed as they are departing Ireland and the interview is conducted using HAPI (Hand Held Personal Interviewing).

Information Sources that Influenced Choice of Ireland



Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Internet	60	51	60	65	59	66	54
Friends/relatives/business associates	41	46	45	33	32	37	46
Guide books	23	13	23	29	31	32	22
Travel Agent/ Tour Operator	12	5	19	9	11	8	20
Films/movies	7	4	6	8	9	6	9
Advertising for Ireland	6	7	2	9	11	6	-
Tourist Board literature	6	5	5	7	13	7	7
Other brochures/promotional literature on Ireland	5	6	5	5	5	6	4
Travel programmes on TV/radio	4	3	2	6	6	5	4
Articles in newspapers/magazines	3	4	1	4	5	4	3

Important Information Sources in Planning the Holiday in Ireland



Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Internet	76	68	77	80	72	78	75
Friends/relatives/business associates	26	28	32	20	20	21	26
Guide books	25	14	25	31	44	35	19
Travel Agent/ Tour Operator	13	5	20	11	8	16	15
Tourist Board literature	6	6	4	6	10	7	7
Other brochures/promotional literature on Ireland	5	5	5	5	5	5	10
Articles in newspapers/magazines	2	3	-	2	3	2	4

Internet Sites Accessed for Choosing Holiday

Base: All Using Internet for Choosing Holiday

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
www.discoverireland.ie	30	22	30	34	30	35	24
User generated content from sites such as blogs or trip advisor	25	22	35	18	25	17	28
www.ireland.com	22	11	24	25	26	27	16

Internet Sites Accessed for Planning Holiday

Base: All Using Internet for Planning Holiday

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
www.discoverireland.ie	28	20	27	32	33	32	25
User generated content from sites such as blogs or trip advisor	22	19	28	17	19	14	25
www.ireland.com	17	10	18	19	22	21	9

Importance of Factors in Considering Ireland for a Holiday (I) - Very Important/Important



Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
<u>Friendliness/Hospitality/Pace of Life</u>							
Friendly, hospitable people	95	93	96	94	95	93	96
Easy, relaxed pace of life	73	80	65	78	84	78	74
<u>Environment</u>							
Beautiful scenery	90	82	91	92	88	91	93
Good range of natural attractions	87	82	89	87	87	84	86
Natural, unspoilt environment	85	78	87	88	85	88	80
Attractive cities/towns	83	86	85	80	75	79	86
<u>Value/price</u>							
Good all round value for money	77	83	77	73	60	73	79
Competitively priced air and sea fares	71	77	74	66	61	62	72

Importance of Factors in Considering Ireland for a Holiday (II) - Very Important/Important



Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
<u>Products and Other Destination Features</u>							
Safe and secure destination	88	89	90	85	84	84	86
Plenty of things to see and do	89	87	91	89	90	89	89
Interesting history/culture	87	83	93	84	88	81	88
Suitable for touring	74	68	78	72	71	74	81

Rating of Ireland on Destination Issues (I)

- Very Satisfied/Satisfied



Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
<u>Friendliness/Hospitality/Pace of Life</u>							
Friendly, hospitable people	97	97	97	97	98	99	96
Easy, relaxed pace of life	89	88	89	89	92	89	87
<u>Environment</u>							
Beautiful scenery	95	90	96	96	95	96	97
Natural, unspoilt environment	90	86	92	89	91	91	95
Good range of natural attractions	91	87	94	90	93	88	88
Attractive cities/towns	90	90	93	86	83	85	93
Litter free/pollution free	77	80	83	70	72	68	78
<u>Value/price</u>							
Competitively priced air and sea fares	68	71	65	68	59	63	73

Rating of Ireland on Destination Issues (II)

- Very Satisfied/Satisfied



Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
<u>Products and Other Destination Features</u>							
Safe and secure destination	95	93	98	95	94	94	95
Interesting history/culture	93	92	97	90	87	92	93
Suitable for touring	85	83	88	84	83	84	87

Overall Value for Money



Base: All Respondents

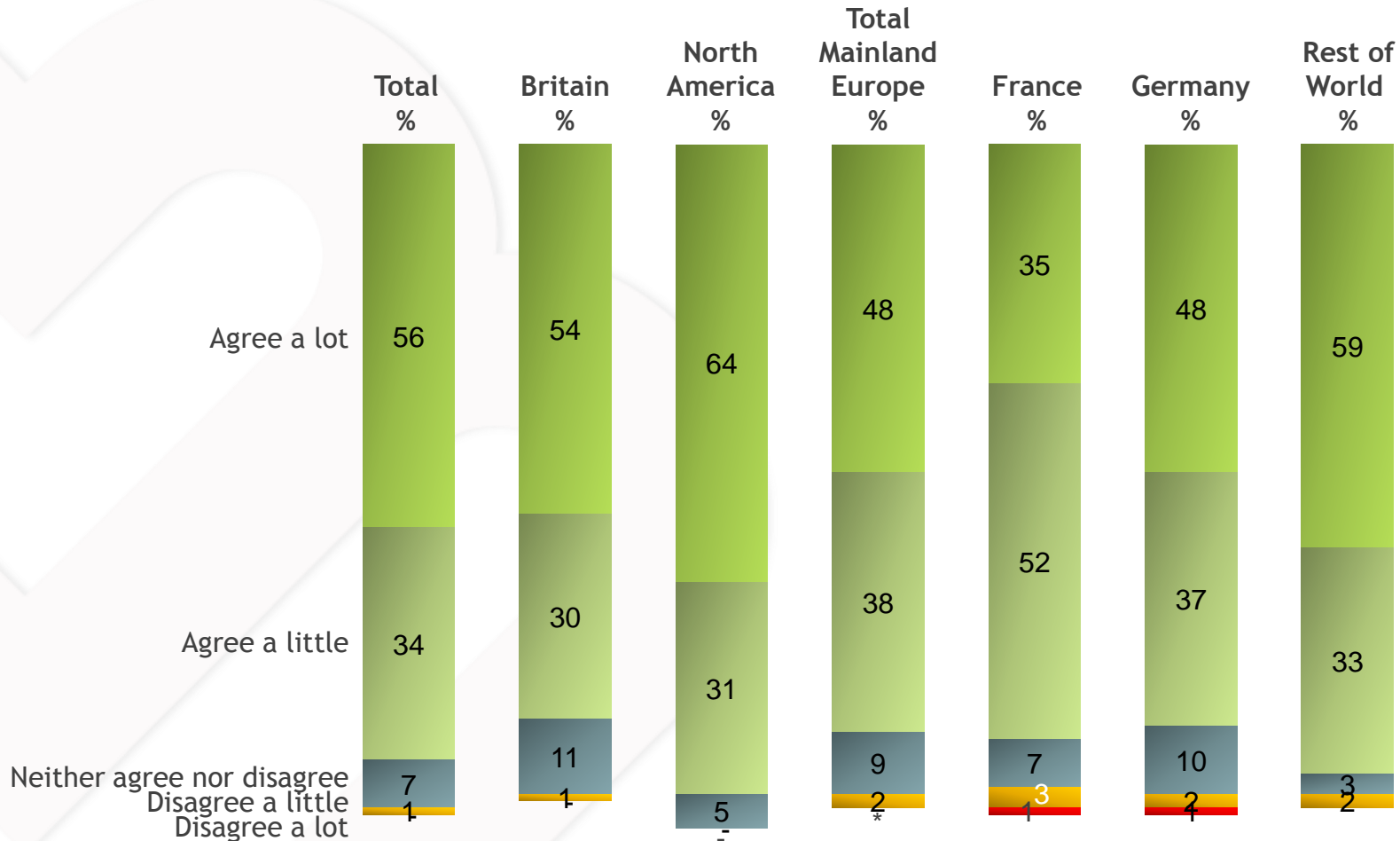
	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Very good	14	17	13	11	3	11	24
Good	41	37	44	39	39	32	45
Fair	38	40	38	39	50	45	30
Poor	5	5	3	8	5	10	*
Very poor	1	1	1	1	1	1	2

Agreement With Statements About Ireland



Base: All Respondents

'IRELANDS CITIES ARE LIVELY AND FUN PLACES TO VISIT'

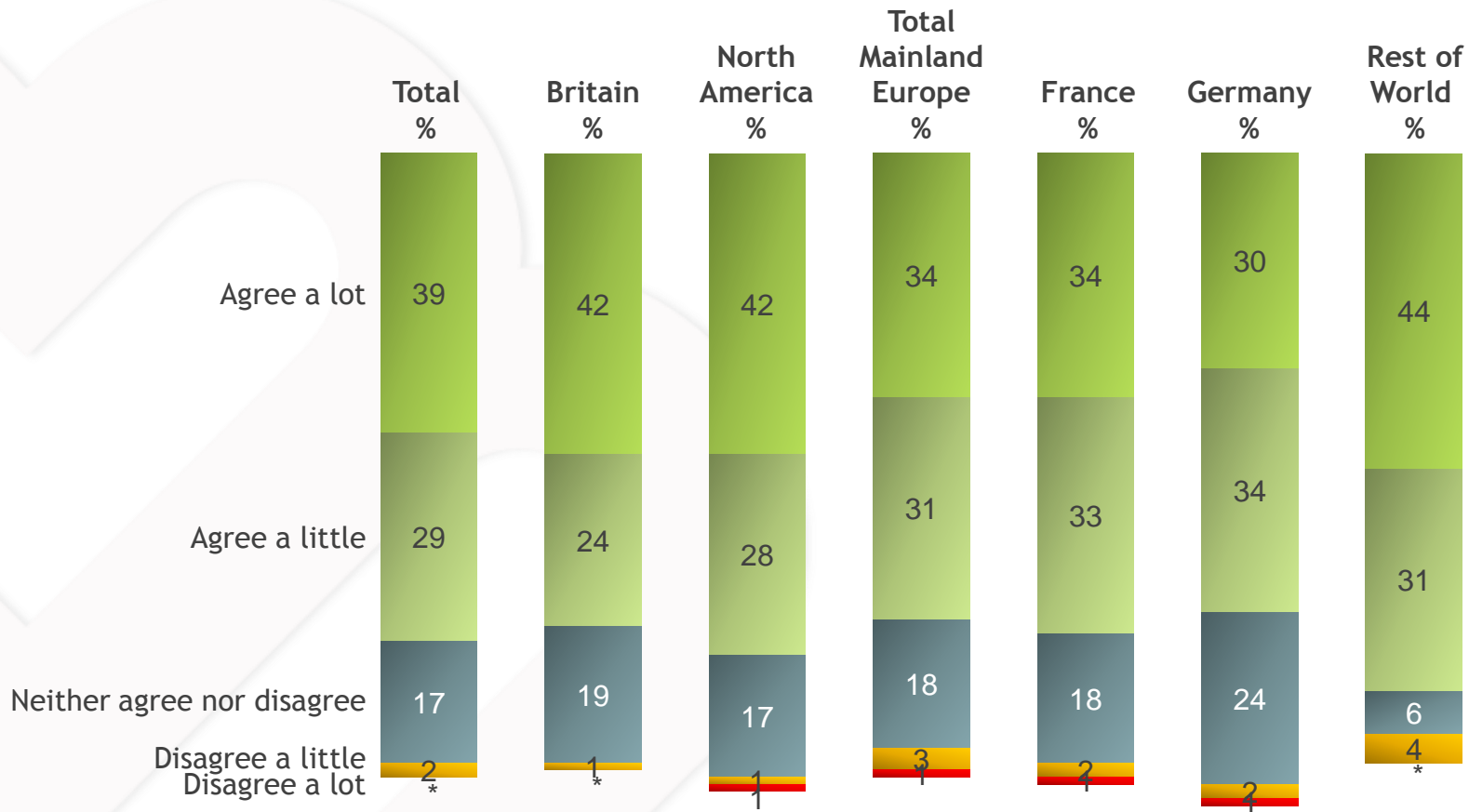


Agreement With Statements About Ireland



Base: All Respondents

‘IRISH CITIES HAVE A VARIED NIGHTLIFE TO SUIT ALL TASTES’

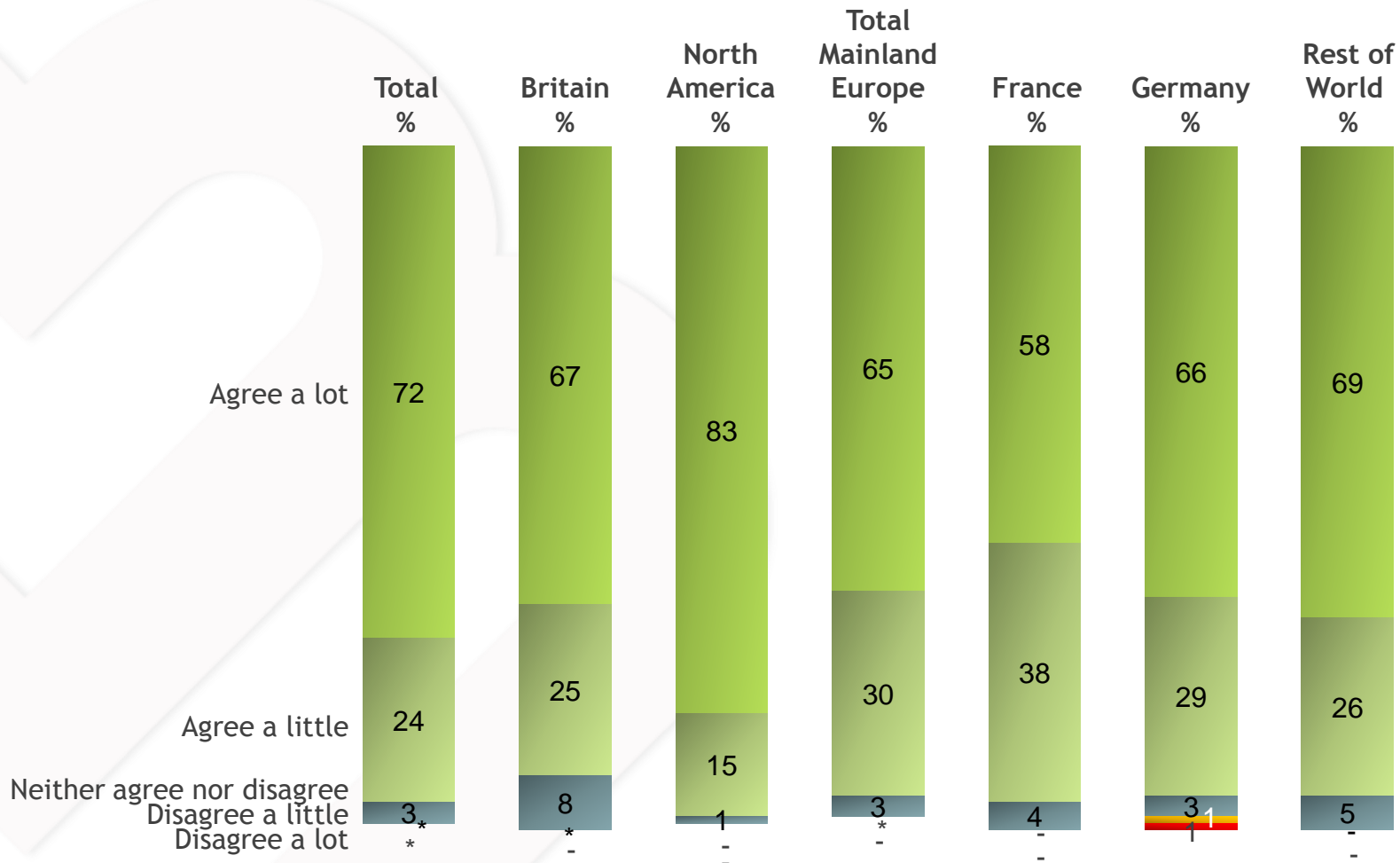


Agreement With Statements About Ireland



Base: All Respondents

'IRELAND HAS INTERESTING HISTORY AND CULTURE TO DISCOVER'

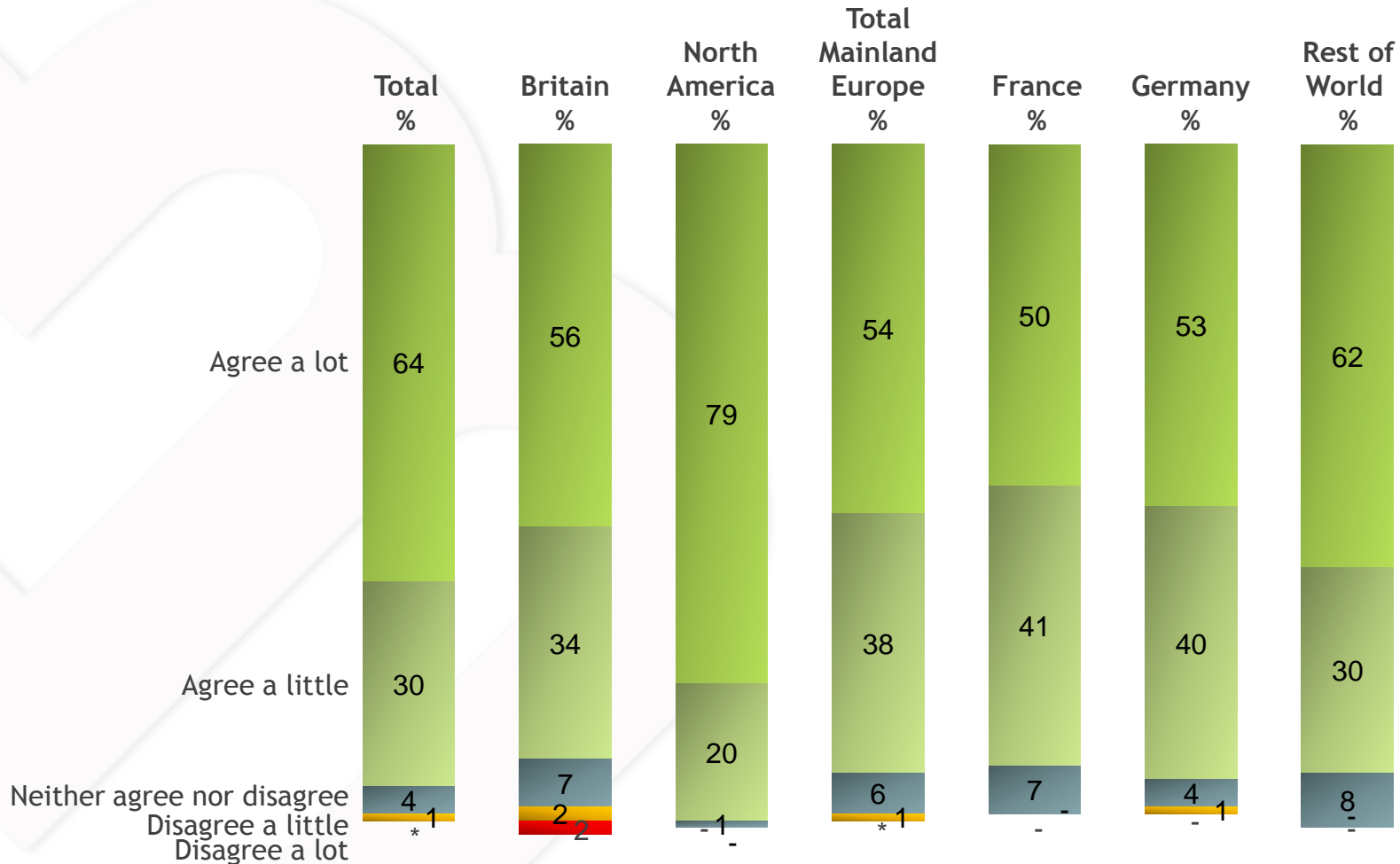


Agreement With Statements About Ireland



Base: All Respondents

'IRELAND HAS A UNIQUE AND APPEALING CULTURE'

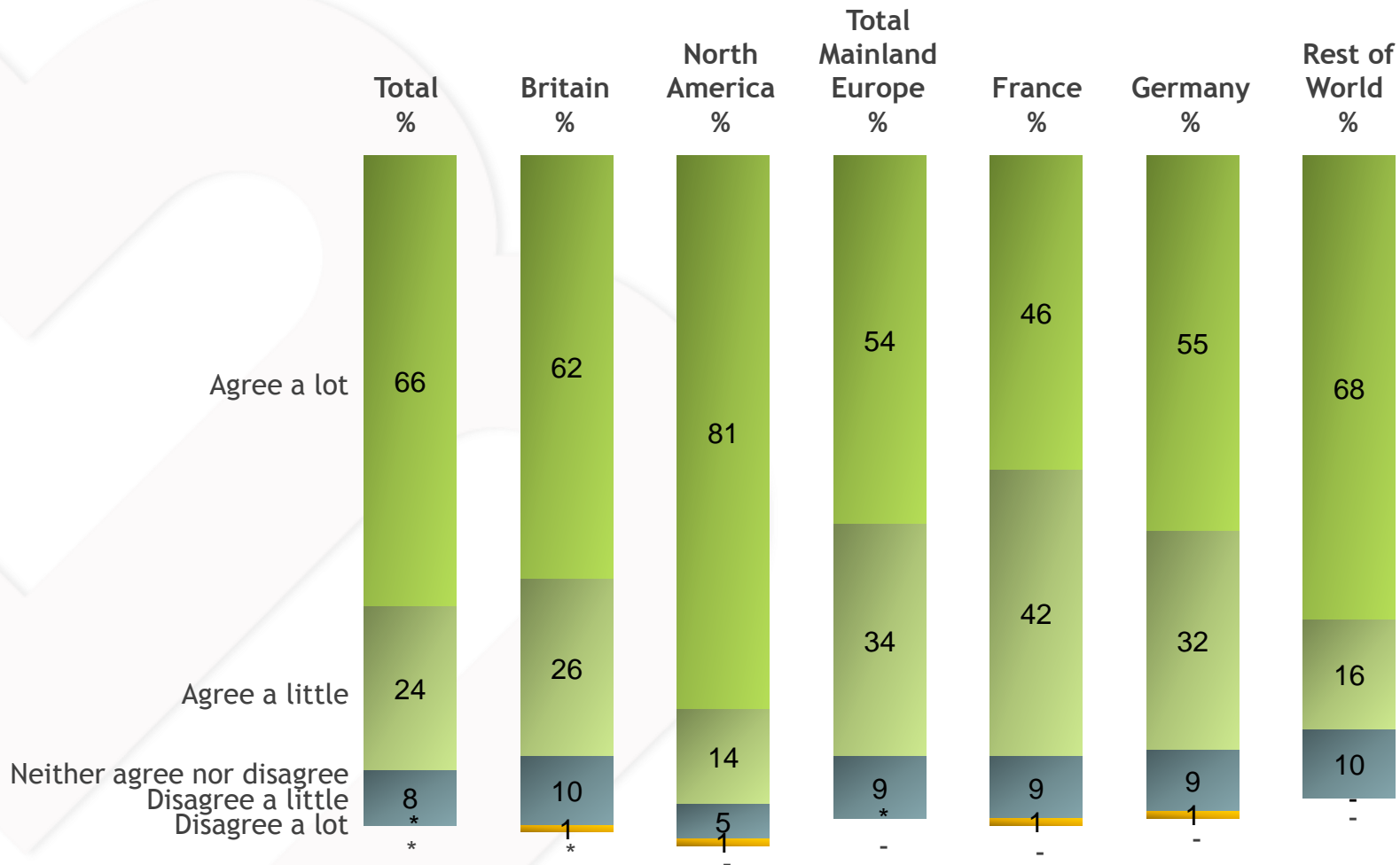


Agreement With Statements About Ireland



Base: All Respondents

'THERE ARE MANY PLACES IN IRELAND WITH STORIES TO SHARE'

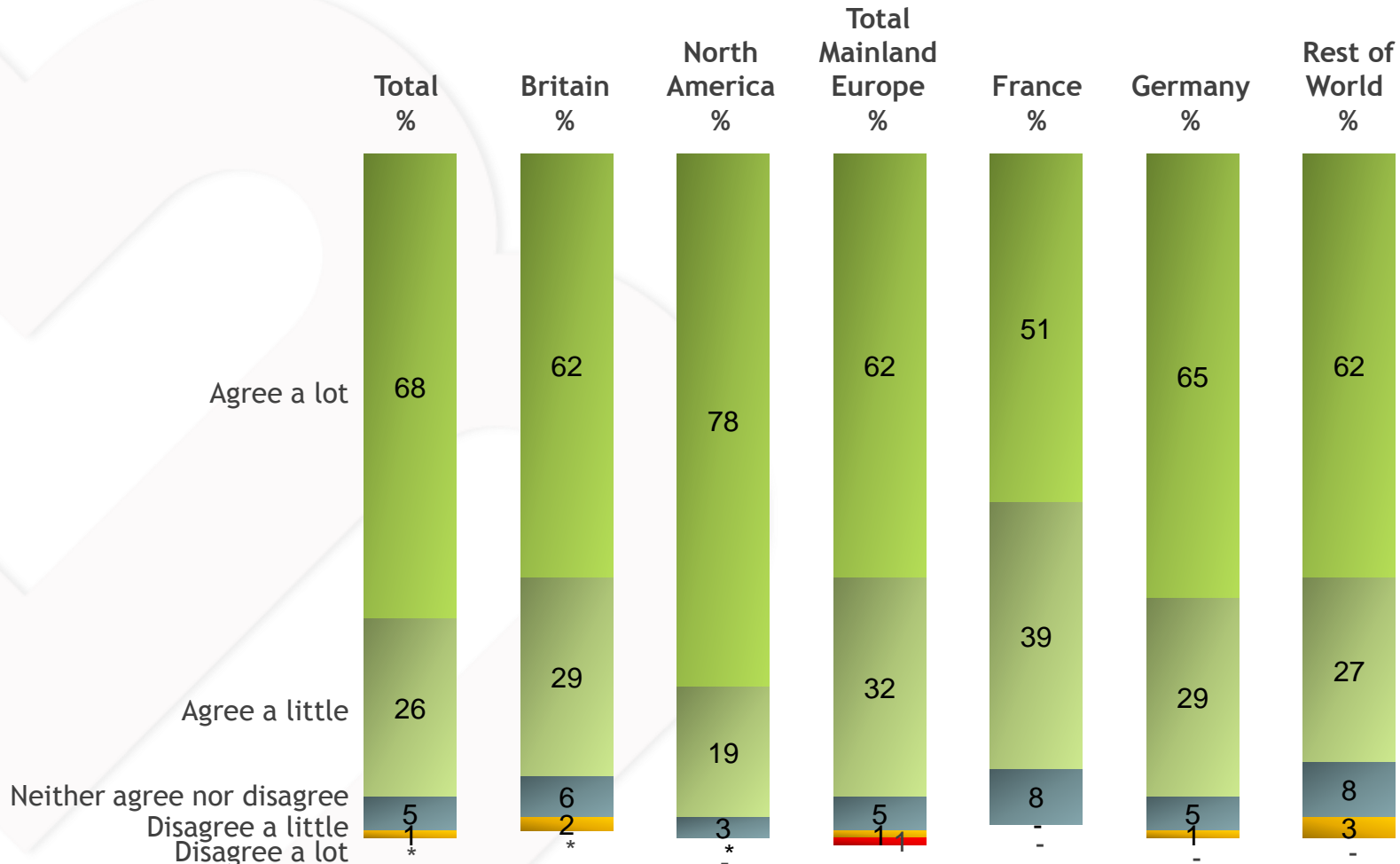


Agreement With Statements About Ireland



Base: All Respondents

'THERE'S LOTS TO DO ON HOLIDAYS IN IRELAND'

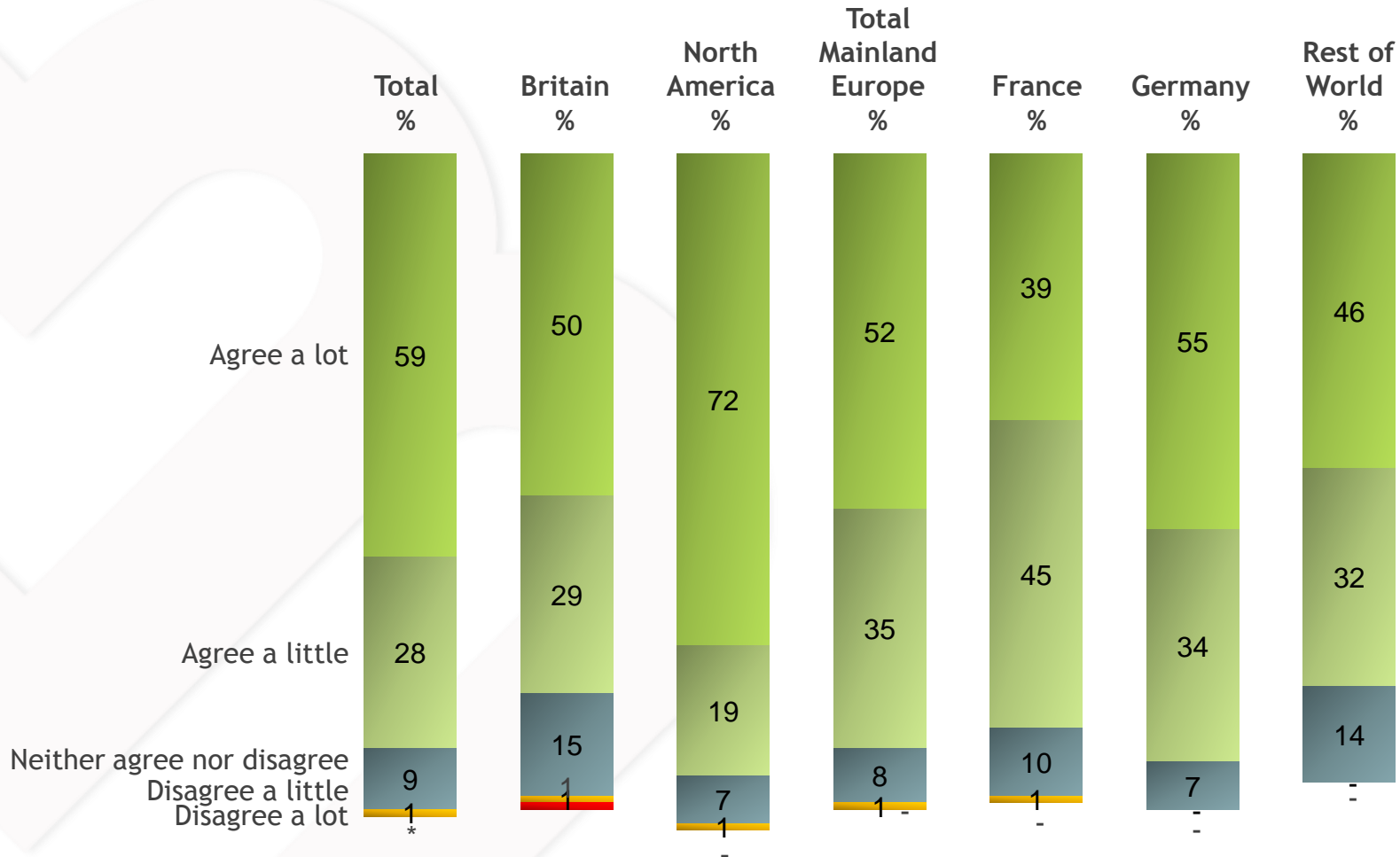


Agreement With Statements About Ireland



Base: All Respondents

'IRELAND PROVIDES PLENTY OF OPPORTUNITIES TO ENJOY
REVITALISING OUTDOOR ACTIVITIES AND EXPERIENCES'

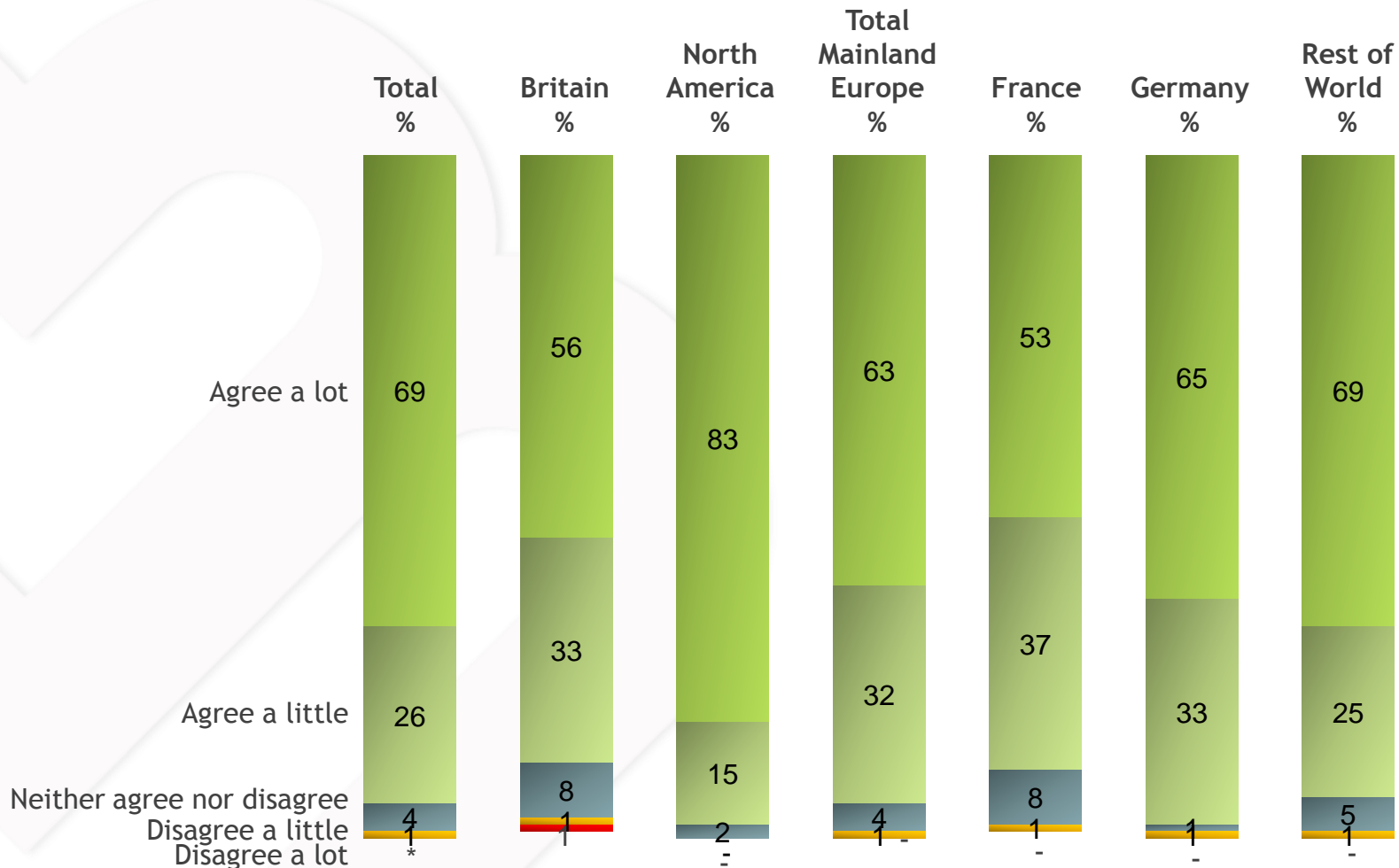


Agreement With Statements About Ireland



Base: All Respondents

'IRELAND HAS GIVEN ME UNFORGETTABLE MEMORIES TO SHARE WITH MY FAMILY/FRIENDS'

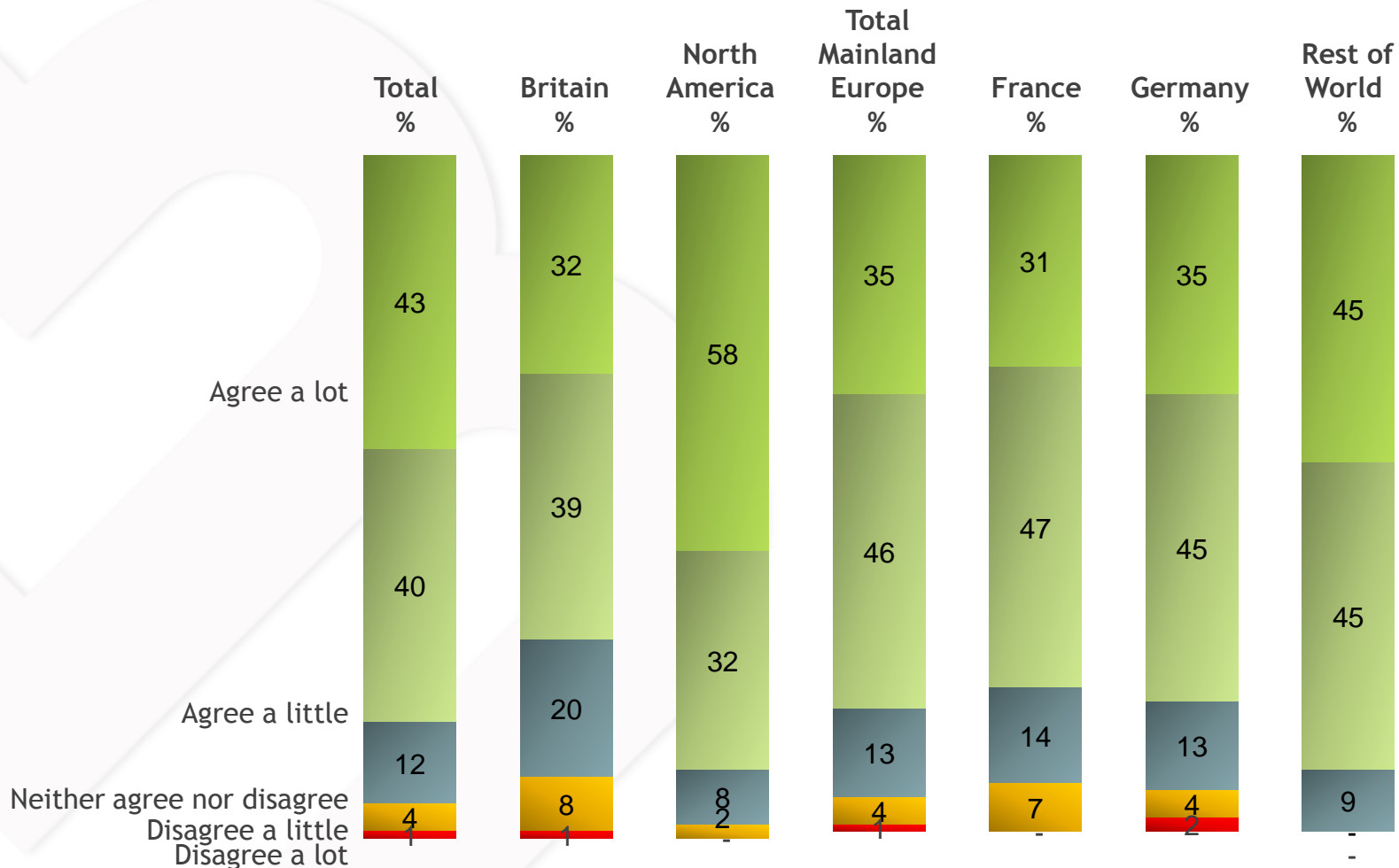


Agreement With Statements About Ireland



Base: All Respondents

'IRELAND IS DIFFERENT TO ANYWHERE ELSE I HAVE BEEN BEFORE'



Words to describe how holidaymakers felt at the end of their trip to Ireland

Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Relaxed	51	55	41	57	56	57	50
Refreshed	32	34	23	36	38	41	40
Stimulated	27	18	30	28	25	27	32
Excited	25	11	29	28	20	30	19
Exhausted	24	29	31	16	17	17	21
Calm	24	27	22	25	32	22	21
Energised	20	16	18	25	26	22	14
Rejuvenated	17	22	19	11	8	16	25
Reconnected with family/friends	14	14	20	8	11	9	12
Underwhelmed	1	*	1	*	-	-	2

Overall Opinion of their Irish Holiday



Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Matched expectations	55	62	42	63	66	57	52
Exceeded expectations	44	36	57	35	32	41	46
Did not live up to expectations	1	2	1	1	1	1	2

The Reasons Why Expectations Exceeded

Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Irish People	67	61	66	69	73	64	71
Scenery	59	45	66	50	51	47	72
History/culture	38	26	43	33	39	26	45
Weather better than expected	36	43	39	28	22	39	33
Nature/wildlife/flora/fauna	26	14	30	26	21	25	23
Good food quality/variety	22	18	25	17	9	9	29
Well kept countryside/no litter/neat/ clean	20	11	28	10	2	12	25
Good accommodation/range/quality	16	18	14	15	8	19	26
Clean environment/no pollution	14	9	19	8	11	10	16
Activities - something for all	13	7	20	6	6	8	10
Relaxing/slow/easy going	11	10	13	8	11	7	14
Good internal transport	9	6	10	9	*	10	13

Likelihood Of Returning For Another Holiday

Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Definitely - I'll be back later this year	7	19	4	5	6	3	5
Definitely - I'll be back next year	19	38	10	19	20	18	12
Definitely - I'll be back in the next few years	31	22	34	33	33	38	29
I hope so - at some time in future	39	19	47	38	38	38	49
Probably not	3	2	5	2	1	2	2
Definitely not	*	*	*	*	-	-	2
Don't know	1	1	*	1	2	1	1

Advantages - Most Frequently Mentioned

Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
The Irish people	62	62	60	63	63	63	57
The scenery	54	48	59	52	55	57	53
Culture/history	44	35	50	41	33	40	49
Drinks/pubs/pub culture	36	35	40	34	32	36	32
English speaking	33	31	44	21	17	20	43
Nature/Ecology	25	14	25	31	29	34	21
Interesting towns/villages	23	12	35	17	18	21	28
Access/easy to get to	20	33	22	14	15	17	17
Unspoilt environment	18	16	24	14	7	21	20
Ancestral/family connections	16	17	32	2	2	1	16
Restful/relaxing	14	14	17	11	12	11	16

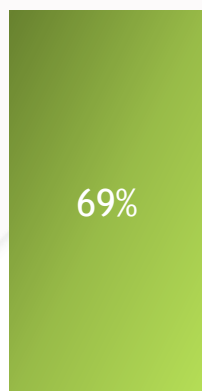
Disadvantages - Most Frequently Mentioned

Base: All Respondents * SMALL BASE

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Weather	24	25	17	31	34	26	13
Drink costs	16	24	8	20	16	28	6
Food costs	13	15	11	15	14	18	6
High cost of living/expensive	12	18	12	10	13	11	10
Driving difficult	12	-	18	13	12	13	3
High cost i.e. souvenirs	9	11	8	9	10	8	11
Exchange rates	7	3	19	1	-	1	-
Poor signposting	7	3	14	4	5	5	9
Bad roads/poor condition/lack of motorways	7	5	8	6	7	7	8
Food - poor quality/lack of variety	6	2	8	7	9	9	7
Accommodation costs	5	5	7	4	5	3	3

Would Ireland be Recommended?

Base: All Respondents



Yes,
definitely



	%
Britain	64
North America	81
Mainland Europe	61
France	55
Germany	63
Rest of the World	65

Key Findings - I

Sources of information that influenced Choice & Planning of holiday

- The most important source for both choosing and planning holidays in Ireland was the internet, particularly for European holidaymakers. It was less important as a source of inspiration for British holidaymakers with just over half claiming the internet influenced their decision to choose Ireland for a holiday.
 - The [discoverireland](https://discoverireland.com) internet site was used by a third of those interviewed for both choosing and planning their Irish holiday. This was followed by sites with user generated content such as blogs and Tripadvisor.
- Advice from friends, family and business associates also influenced planning the holiday, with one in four consulting friends, family, etc.
- Travel agents and tour operators were used by around one in ten respondents, this source was used by two in ten holidaymakers from North America.
- Tourist board literature was most popular among French holidaymakers, used by around one in ten for choosing and planning their holiday in Ireland

Key Findings II

Factors that are VERY IMPORTANT in considering Ireland for a holiday

- Holidaymakers considered friendly, hospitable people to be the most important factor when choosing Ireland as a holiday destination. North Americans stand out above other markets on this measure.
- Beautiful scenery was rated to be a very important factor, along with a good range of natural attractions and our natural unspoilt environment. Attractive cities and towns and a secure and safe destination also featured as important when considering Ireland. Furthermore, visitors expected to have plenty of things to do and see with interesting history and culture.
- Good, all round value for money was mentioned as a very important consideration for three-quarters of respondents.

Key Findings - III

Satisfaction on experiences of Ireland - VERY SATISFIED

- Almost all those interviewed were satisfied with the hospitality and friendliness of the people, the Germans in particular with 99% expressing their satisfaction.
- Overall satisfaction with the environment is high. Nine out of ten holidaymakers claimed to be satisfied/very satisfied with their experience of beautiful scenery, the natural and unspoilt environment, and range of natural attractions on their holiday.
- One area of the environment that needs improvement is litter and pollution as this has a lower overall score on satisfaction at 77% than all other measures on the environment.
- Another point of note is that air and sea fares could be more competitive, rated as satisfactory/very satisfactory by 68% of overseas holidaymakers. The French in particular claimed to be less satisfied with this (59% considering themselves satisfied/very interviewed claimed to be satisfied or very satisfied).

Key Findings IV

Agreement with statements about Ireland

- Almost three-quarters of holidaymakers agree that Ireland has an interesting history and culture to discover, (83% of North American holidaymakers).
- More than two thirds claimed that Ireland has given them unforgettable memories to share with family and friends, once again more Americans agree (83%), less so the British (56%).
- Nearly seven out of ten agree that there is lots to do on holidays in Ireland with 78% of North American agreeing with this. Just half (51%) of French visitors agree a lot with this statement.
- More than six out of ten agree that there are many places in Ireland with stories to share and once again all main markets bar the French agree with this. Similarly over just over two thirds of all visitors agree that Ireland has a unique and appealing culture with once again eight out of ten North American holidaymakers agreeing with this statement.
- Over half agree that Ireland provides lots of opportunities to enjoy revitalising outdoor activities and experiences. Again the French visitor agrees somewhat less with this
- About half of German and British holidaymakers agree that Ireland cities are lively and fun places to visit. Almost two thirds of North American visitors also agree with this.

Key Findings V

How holidaymakers felt at the end of their trip to Ireland

(Key words used to describe visitor's feelings)

- The most popular word used was **relaxed** and this was across all main markets.
- This was followed by **refreshed**, this was felt more by the French and German than North Americans!
- **Stimulated**, was a word the North Americans chose and this was also felt by visitors from other parts of the world. The Germans felt **excited**, and **exhausted** (also how the Americans felt). The French also felt **calm** and the British **rejuvenated**.

Overall Expectations

- Over half of visitors claimed that their holiday matched their expectations, and over four out of ten claimed that their holiday exceeded their expectations.
- The main reasons given were the Irish people, the scenery, history and culture, and the weather being better than expected. The flora and fauna, nature and wildlife were also mentioned.

Key Findings VI

Likelihood of returning to Ireland for another holiday & recommendation of Ireland

- Well over half of visitors claimed that they would definitely return to Ireland in the next few years. This was highest among the British holidaymakers. Three quarters of North Americans also intended to return within the next few years. Two thirds of French and German holidaymakers made a similar claim.
- Nearly all other visitors hope to come back at some point in the future.
- Two thirds of holidaymakers would definitely recommend a holiday in Ireland with eight out of ten North Americans, six out of ten British and German visitors and five out of ten French, along with over two thirds of visitors from other parts of the world

Key Findings VII

Advantages & disadvantages that distinguish Ireland from other similar holiday destinations

ADVANTAGES

- Irish people
- The scenery
- Culture & history
- Pub culture
- English speaking
- Nature/ecology
- Interesting towns/villages
- Easy to get to
- Unspoilt environment
- Ancestral/family connections
- Restful & relaxing

DISADVANTAGES

- Weather
- Cost of drinks
- Cost of food
- High cost of living
- Driving difficult
- Souvenirs expensive
- Exchange rates
- Poor signposting
- Bad roads/poor condition of roads
- Food - lack of variety, poor quality
- Accommodation costs

Overall Conclusions - I

- Holidaymakers are seeking friendly and welcoming people along with an unspoilt environment, beautiful scenery and plenty to do and see. These expectations were met and holidaymakers were satisfied with the factors they considered important for the enjoyment of their holiday.
- History and culture were also very important for visitors but they are also looking for some fun.
- There is agreement among holidaymakers that Ireland has a rich and unrivalled heritage around story telling/sharing stories.
- Ireland is seen as somewhat unique and different to other holiday destinations
- Overseas holidaymakers primary source their information for their holiday is the internet along with advice from friends/family.

Overall conclusions - II

- Holidaymakers to Ireland were satisfied with the value for money they experienced.
- However, there is a need for some improvement with regards to the litter and pollution
- At the end of their holiday, visitors claimed to be relaxed, refreshed and rejuvenated.
- The expectations of their holiday were met and in many instances exceeded.

Visitor Attitudes Survey

Main Markets 2014

