

Visitor Attitudes Survey - Main Markets 2015

41113380 MR



Introduction & Overview

- The Visitor Attitudes Port study focuses on departing overseas holidaymakers.
- Interviewing is conducted in each of the major air and sea ports throughout the Republic of Ireland:
 - **AIRPORTS** - Dublin, Cork and Shannon
 - **SEAPORTS** - Dublin, Dunlaoighre, Rosslare and Cork.
- The **achieved sample in 2015 was 1,987** 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 between **June to October 2015**.
- Respondents are interviewed as they depart 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 | 59 | 55 | 58 | 64 | 59 | 64 | 52 |
| Friends/relatives/business associates | 43 | 43 | 49 | 38 | 35 | 35 | 47 |
| Guide books | 20 | 16 | 20 | 23 | 31 | 24 | 20 |
| Travel agent/tour operator | 10 | 6 | 16 | 7 | 6 | 9 | 17 |
| Films/movies | 7 | 5 | 8 | 6 | 10 | 5 | 9 |
| Brochures/promotional literature on Ireland | 7 | 4 | 7 | 7 | 7 | 9 | 10 |
| Tourist Board literature | 6 | 4 | 8 | 5 | 8 | 4 | 5 |
| Travel programmes on TV/radio | 6 | 2 | 8 | 5 | 4 | 3 | 7 |
| Advertising for Ireland | 5 | 4 | 5 | 6 | 6 | 8 | 9 |
| Articles in newspapers/magazines | 4 | 3 | 2 | 5 | 8 | 6 | 3 |

Important Information Sources in Planning a Holiday in Ireland



Base: All Respondents

| | Total % | Britain % | North America % | Total Mainland Europe % | France % | Germany % | Rest of World % |
|---|---------|-----------|-----------------|-------------------------|----------|-----------|-----------------|
| Internet | 83 | 86 | 78 | 85 | 80 | 86 | 77 |
| Friends/relatives/business associates | 24 | 22 | 32 | 18 | 23 | 17 | 26 |
| Guide books | 24 | 13 | 27 | 28 | 36 | 31 | 20 |
| Travel agent/tour operator | 16 | 4 | 27 | 11 | 9 | 13 | 24 |
| Brochures/promotional literature on Ireland | 6 | 6 | 8 | 5 | 7 | 5 | 3 |
| Tourist Board literature | 4 | 3 | 4 | 4 | 5 | 5 | 4 |
| Articles in newspapers/magazines | 2 | 3 | 1 | 1 | 1 | 2 | 3 |

Internet channels that were important in **choosing** Ireland as the destination for a holiday

Base: All Using Internet for Choosing Holiday

| | Total % | Britain % | North America % | Total Mainland Europe % | France % | Germany % | Rest of World % |
|--|---------|-----------|-----------------|-------------------------|----------|-----------|-----------------|
| Carrier sites e.g. Ryanair, Delta | 33 | 32 | 33 | 35 | 20 | 44 | 22 |
| Review sites e.g. tripadvisor | 30 | 30 | 37 | 23 | 26 | 19 | 51 |
| Accommodation provider e.g. Booking.com | 29 | 24 | 30 | 30 | 27 | 31 | 42 |
| Online travel agents e.g. Expedia | 20 | 13 | 32 | 13 | 10 | 9 | 29 |
| Tourist Board sites e.g. discoverireland.ie | 19 | 15 | 19 | 20 | 17 | 25 | 26 |
| Price comparison sites e.g. Trivago | 12 | 9 | 12 | 12 | 13 | 13 | 13 |
| Social media e.g. Facebook, Twitter, Instagram | 12 | 10 | 13 | 10 | 10 | 8 | 26 |
| Other user generated sites, e.g., blogs | 6 | 2 | 10 | 5 | 6 | 5 | 8 |
| None of these | 21 | 27 | 18 | 22 | 25 | 19 | 12 |

Internet Sites that were important as a source of information when **planning** a holiday

Base: All Using Internet for Planning Holiday

| | Total % | Britain % | North America % | Total Mainland Europe % | France % | Germany % | Rest of World % |
|--|---------|-----------|-----------------|-------------------------|----------|-----------|-----------------|
| Carrier sites e.g. Ryanair. Delta | 39 | 42 | 38 | 38 | 28 | 48 | 38 |
| Accommodation provider e.g. Booking.com | 33 | 30 | 36 | 31 | 27 | 31 | 38 |
| Review sites e.g. tripadvisor | 31 | 28 | 42 | 24 | 24 | 23 | 37 |
| Tourist Board sites e.g. discoverireland.ie | 19 | 13 | 22 | 19 | 23 | 23 | 18 |
| Online travel agents e.g. Expedia | 19 | 12 | 32 | 12 | 11 | 8 | 29 |
| Price comparison sites e.g. Trivago | 10 | 9 | 10 | 10 | 11 | 12 | 16 |
| Social Media e.g. Facebook, Twitter, Instagram | 9 | 7 | 10 | 9 | 6 | 8 | 13 |
| Other user generated sites, e.g., blogs | 6 | 4 | 8 | 5 | 4 | 5 | 9 |
| None of these | 17 | 19 | 13 | 13 | 27 | 13 | 14 |

Importance of Factors in Considering Ireland for a Holiday (I) - 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 | 96 | 96 | 96 | 95 | 94 | 94 | 97 |
| Easy, relaxed pace of life | 75 | 80 | 70 | 77 | 82 | 81 | 75 |
| <u>Environment</u> | | | | | | | |
| Beautiful scenery | 92 | 88 | 94 | 93 | 93 | 93 | 91 |
| Good range of natural attractions | 87 | 83 | 91 | 87 | 87 | 89 | 80 |
| Natural, unspoilt environment | 86 | 84 | 86 | 88 | 92 | 88 | 80 |
| Attractive cities/towns | 83 | 82 | 86 | 80 | 75 | 80 | 86 |
| <u>Value/Price</u> | | | | | | | |
| Good all round value for money | 80 | 87 | 81 | 75 | 63 | 71 | 79 |
| Competitively priced air and sea fares | 74 | 78 | 74 | 71 | 67 | 69 | 74 |

Importance of Factors in Considering Ireland for a Holiday (II) - 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 | 92 | 93 | 95 | 88 | 85 | 89 | 92 |
| Plenty of things to see and do | 90 | 91 | 93 | 89 | 88 | 89 | 81 |
| Interesting history/culture | 86 | 85 | 90 | 83 | 88 | 84 | 82 |
| Suitable for touring | 74 | 71 | 81 | 69 | 73 | 75 | 78 |

Rating of Ireland on Destination Issues (I)

- 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 | 98 | 98 | 99 | 98 | 95 | 99 | 96 |
| Easy, relaxed pace of life | 92 | 92 | 91 | 91 | 90 | 93 | 93 |
| <u>Environment</u> | | | | | | | |
| Beautiful scenery | 96 | 93 | 97 | 97 | 96 | 98 | 96 |
| Natural, unspoilt environment | 93 | 89 | 96 | 92 | 89 | 93 | 92 |
| Good range of natural attractions | 94 | 89 | 97 | 93 | 90 | 96 | 95 |
| Attractive cities/towns | 91 | 90 | 95 | 87 | 83 | 89 | 96 |
| Litter free/pollution free | 83 | 81 | 89 | 81 | 83 | 81 | 76 |
| <u>Value/price</u> | | | | | | | |
| Competitively priced air and sea fares | 75 | 77 | 79 | 73 | 70 | 73 | 66 |

Rating of Ireland on Destination Issues (II)

- 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 | 96 | 97 | 98 | 95 | 95 | 96 | 96 |
| Interesting history/culture | 95 | 93 | 99 | 93 | 91 | 94 | 96 |
| Suitable for touring | 87 | 86 | 90 | 86 | 86 | 89 | 93 |



Overall Value for Money In Republic of Ireland

Base: All Respondents

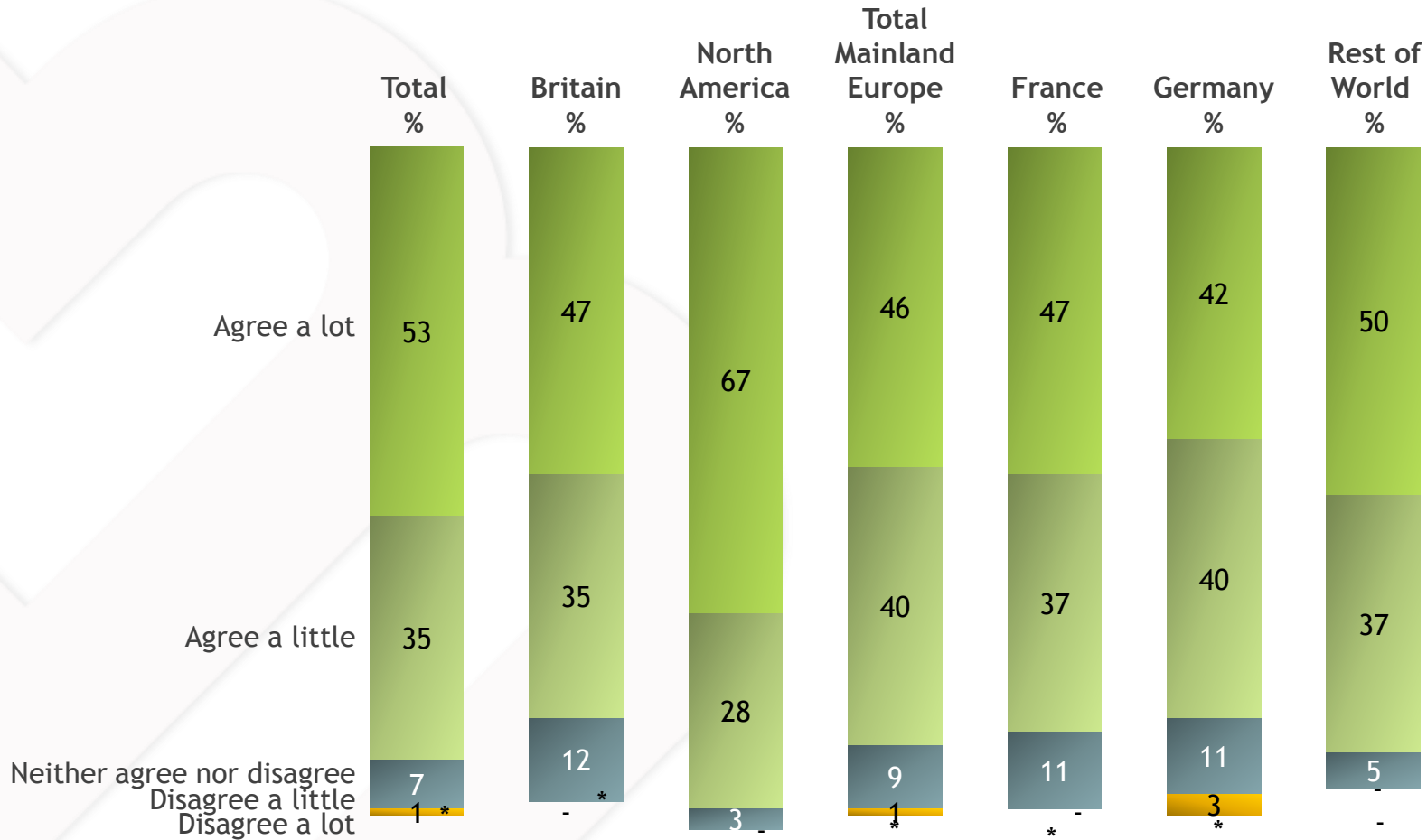
| | Total % | Britain % | North America % | Total Mainland Europe % | France % | Germany % | Rest of World % |
|-----------|---------|-----------|-----------------|-------------------------|----------|-----------|-----------------|
| Very good | 18 | 19 | 28 | 11 | 12 | 8 | 20 |
| Good | 45 | 48 | 43 | 45 | 44 | 35 | 38 |
| Fair | 31 | 28 | 26 | 36 | 39 | 47 | 39 |
| Poor | 5 | 5 | 3 | 8 | 4 | 9 | 4 |
| Very poor | * | - | - | * | - | - | - |



Agreement With Statements About Ireland

Base: All Respondents

'IRELANDS CITIES ARE LIVELY AND FUN PLACES TO VISIT'

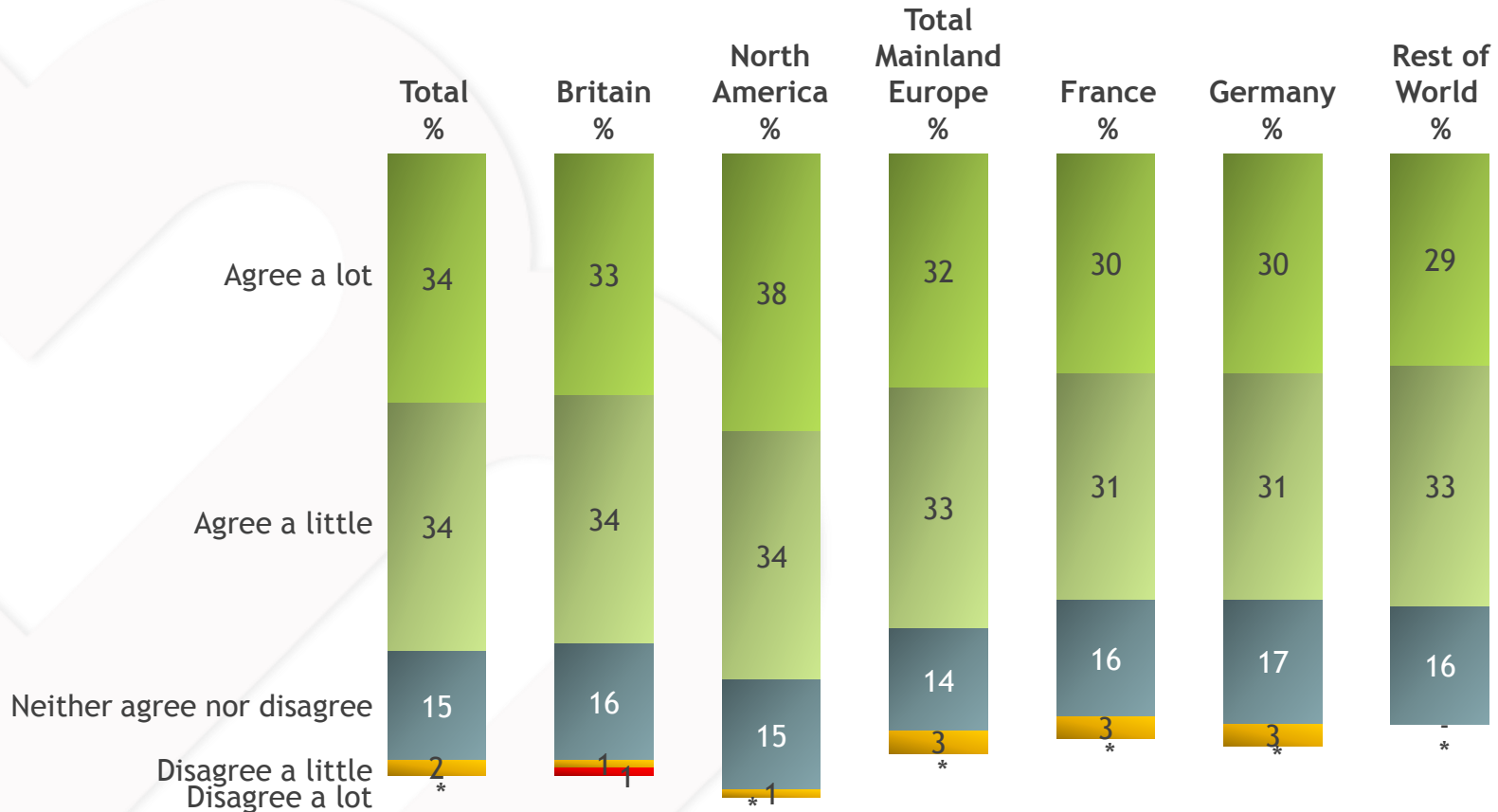


Agreement With Statements About Ireland



Base: All Respondents

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

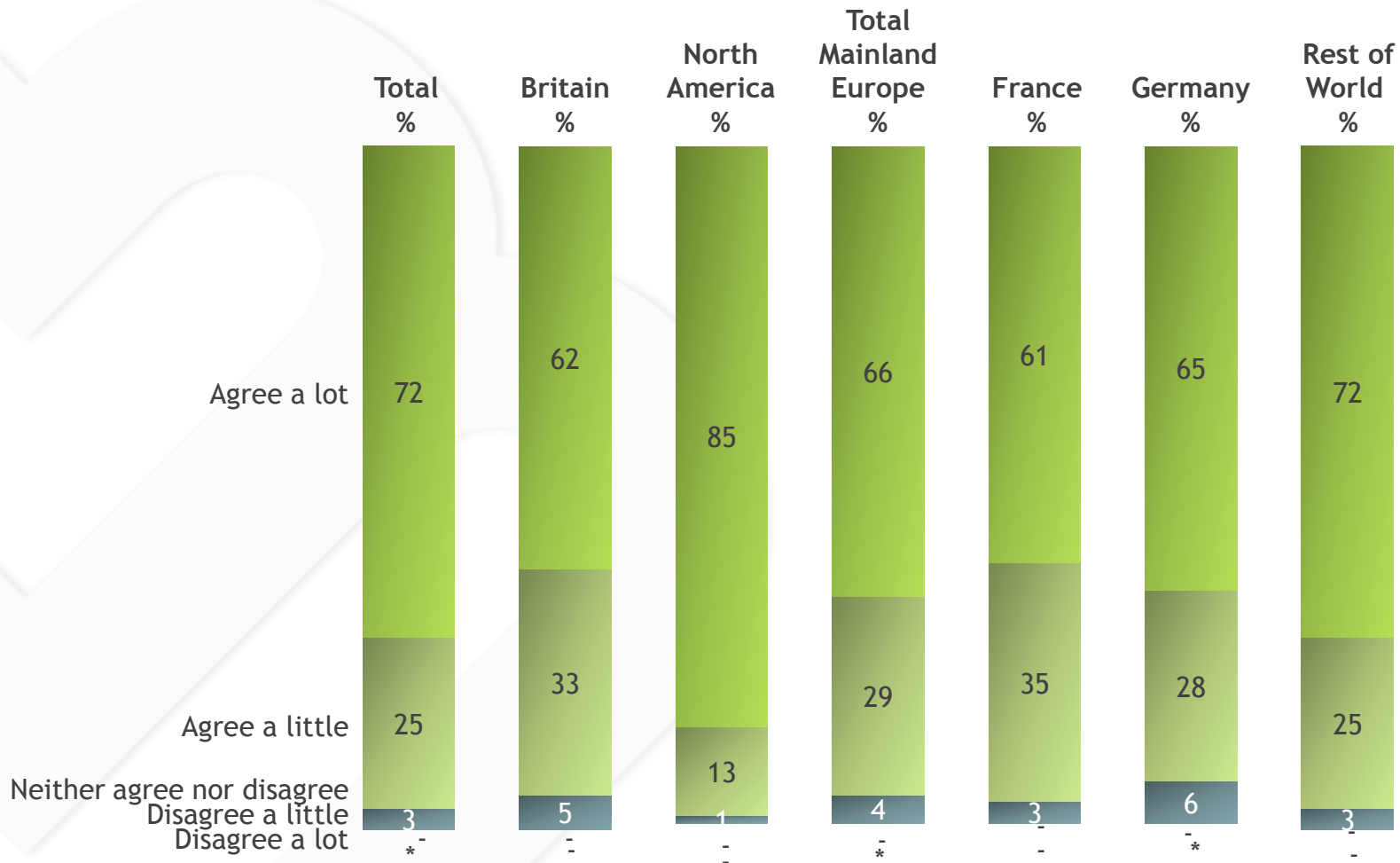


Agreement With Statements About Ireland



Base: All Respondents

'IRELAND HAS INTERESTING HISTORY AND CULTURE TO DISCOVER'

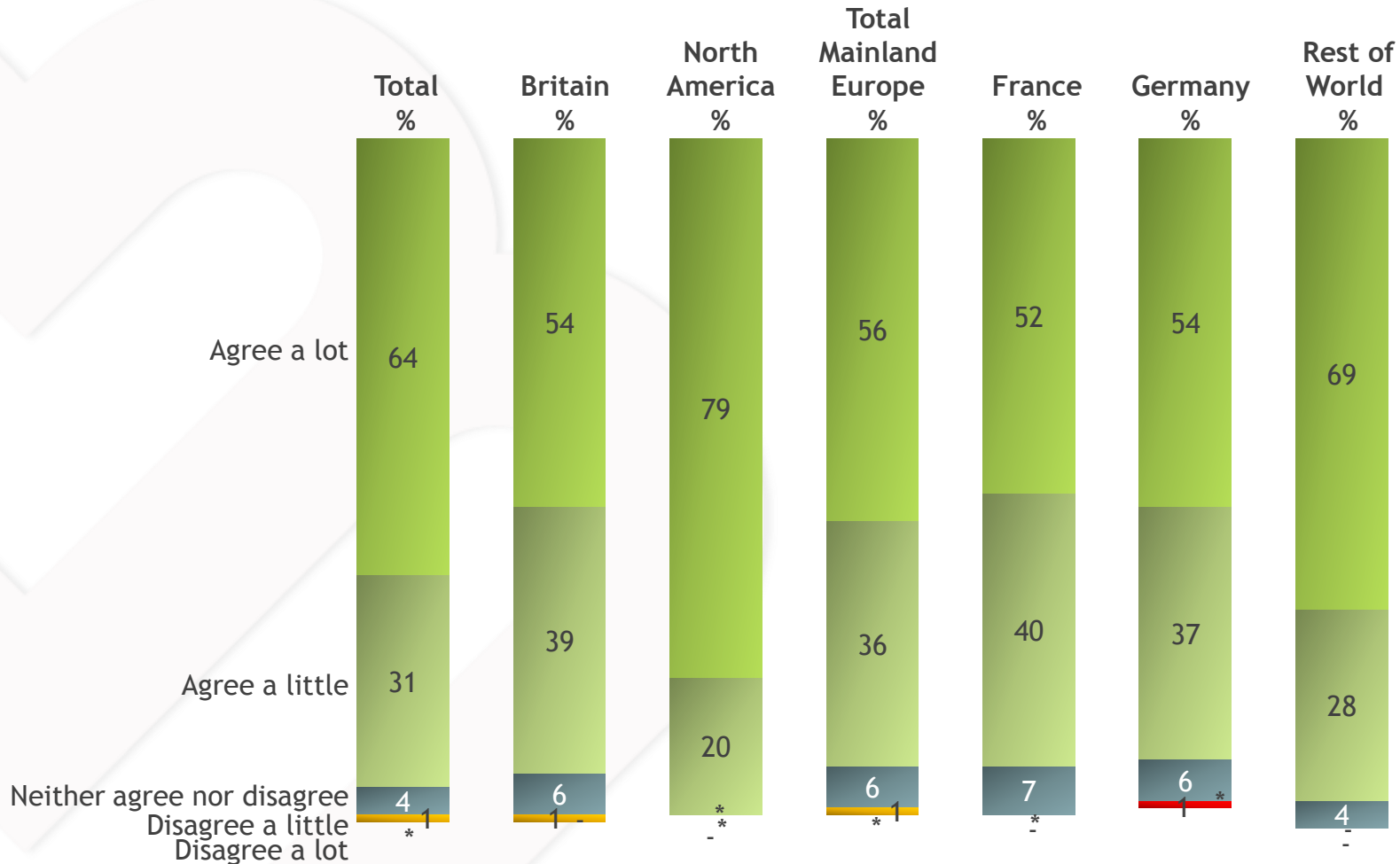


Agreement With Statements About Ireland



Base: All Respondents

'IRELAND HAS A UNIQUE AND APPEALING CULTURE'

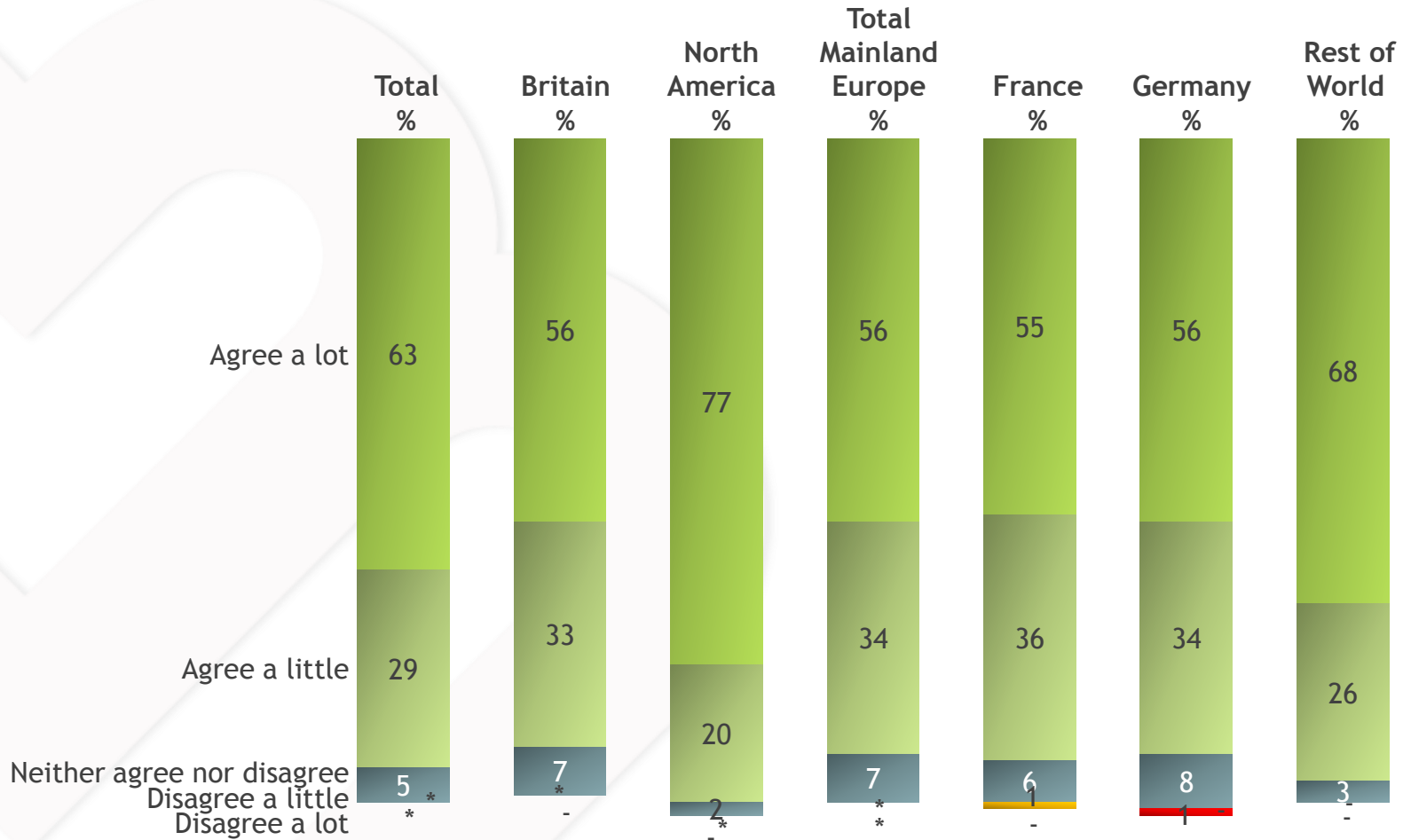


Agreement With Statements About Ireland



Base: All Respondents

‘THERE ARE MANY PLACES IN IRELAND WITH STORIES TO SHARE’

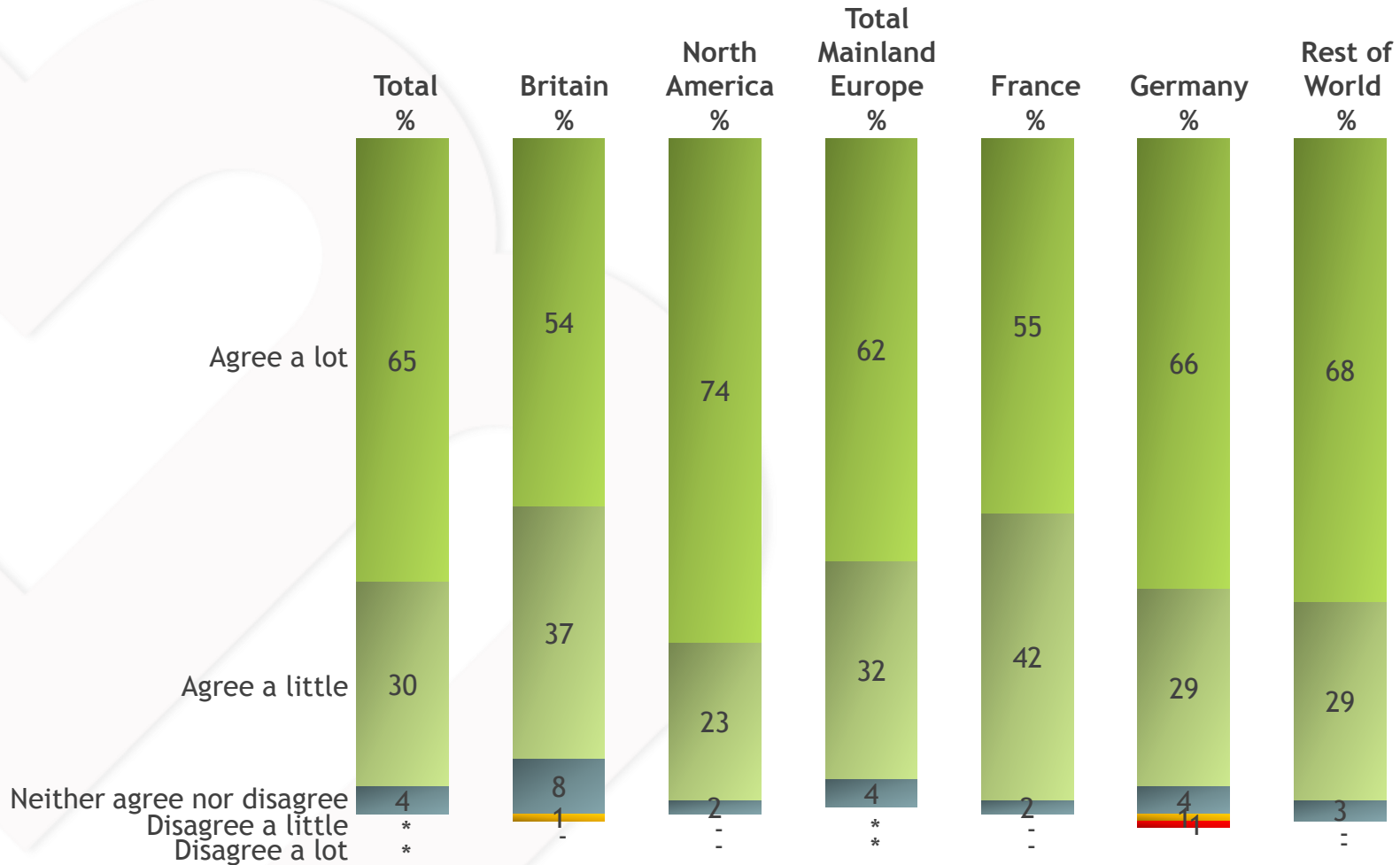


Agreement With Statements About Ireland



Base: All Respondents

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

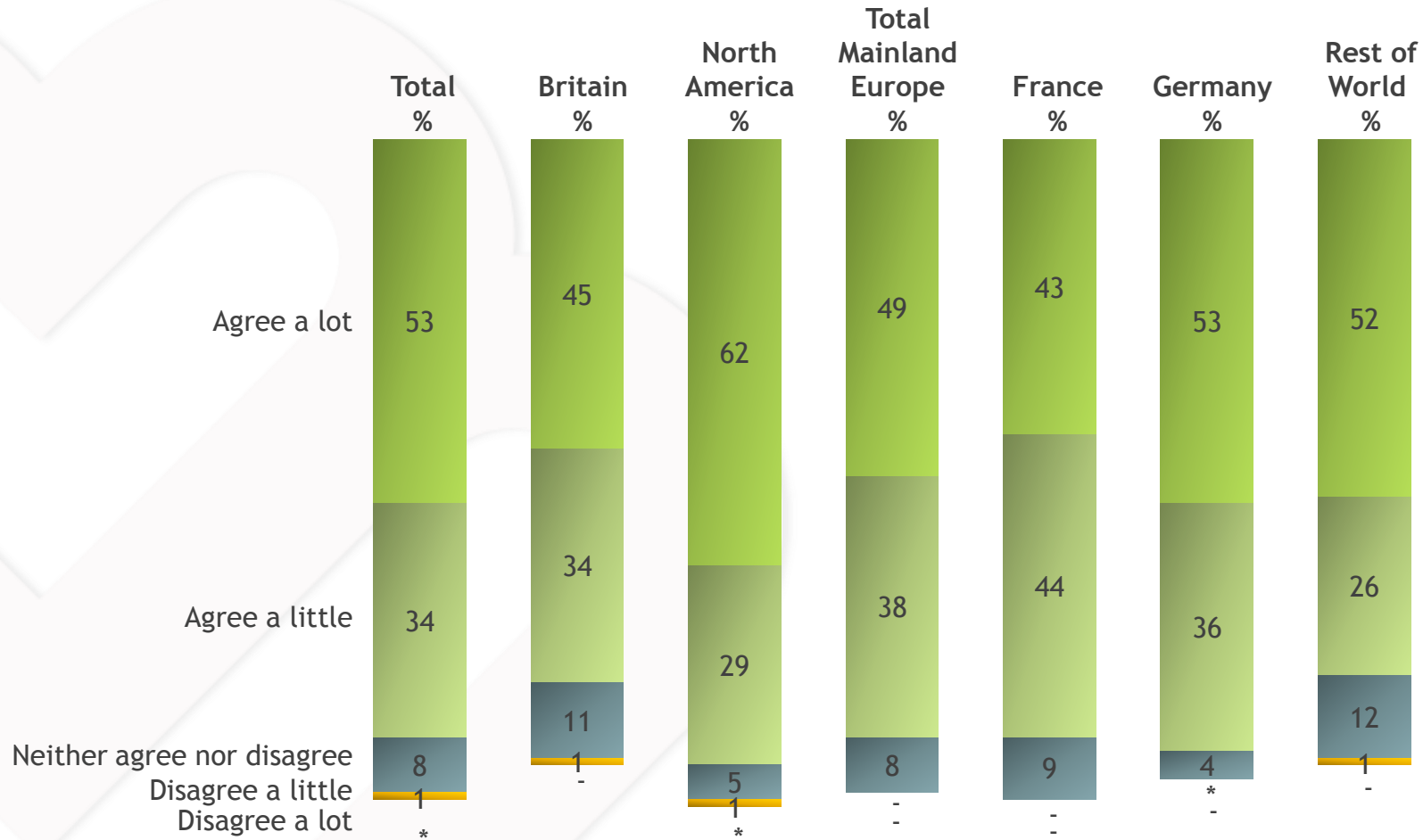


Agreement With Statements About Ireland



Base: All Respondents

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

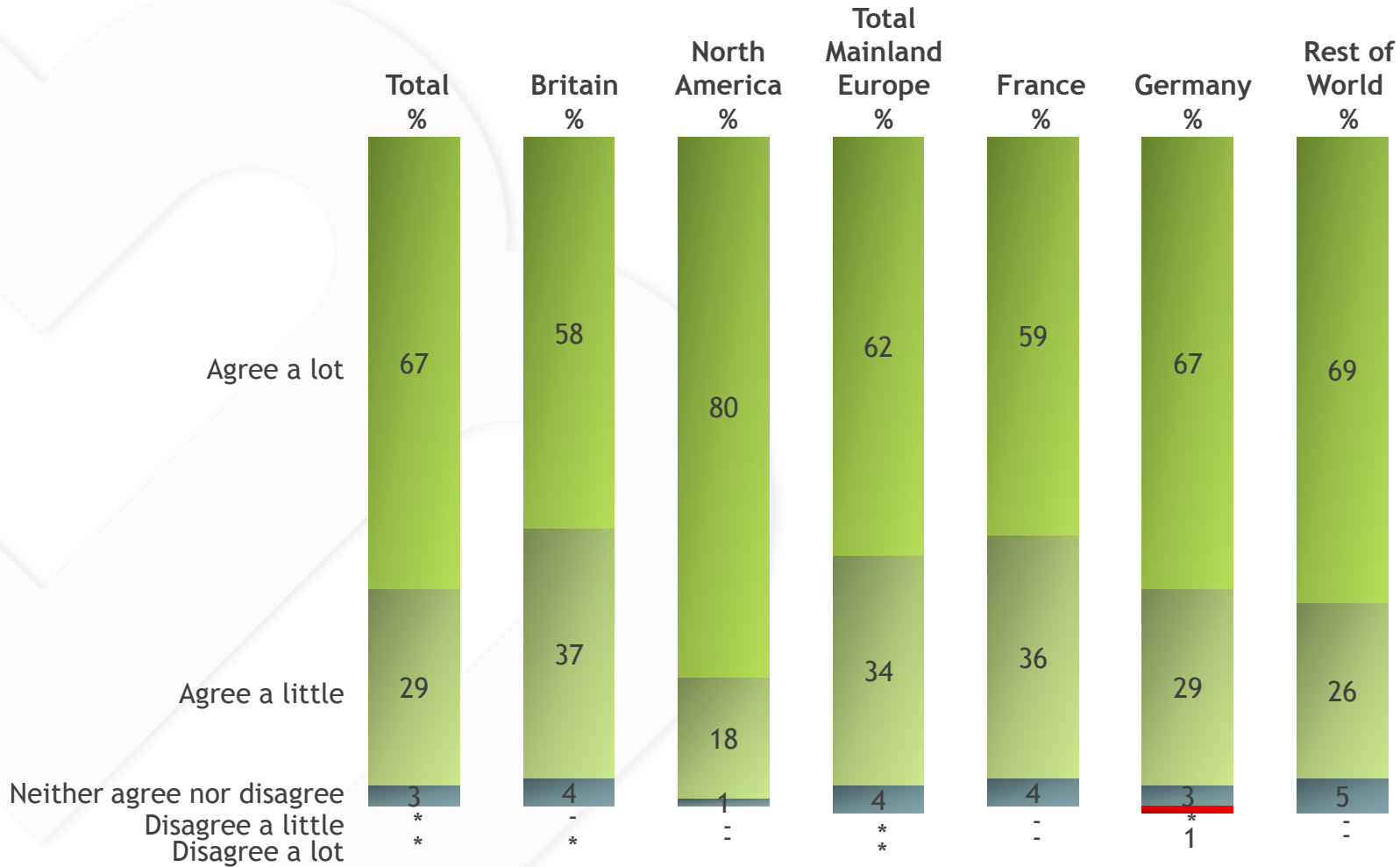


Agreement With Statements About Ireland



Base: All Respondents

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

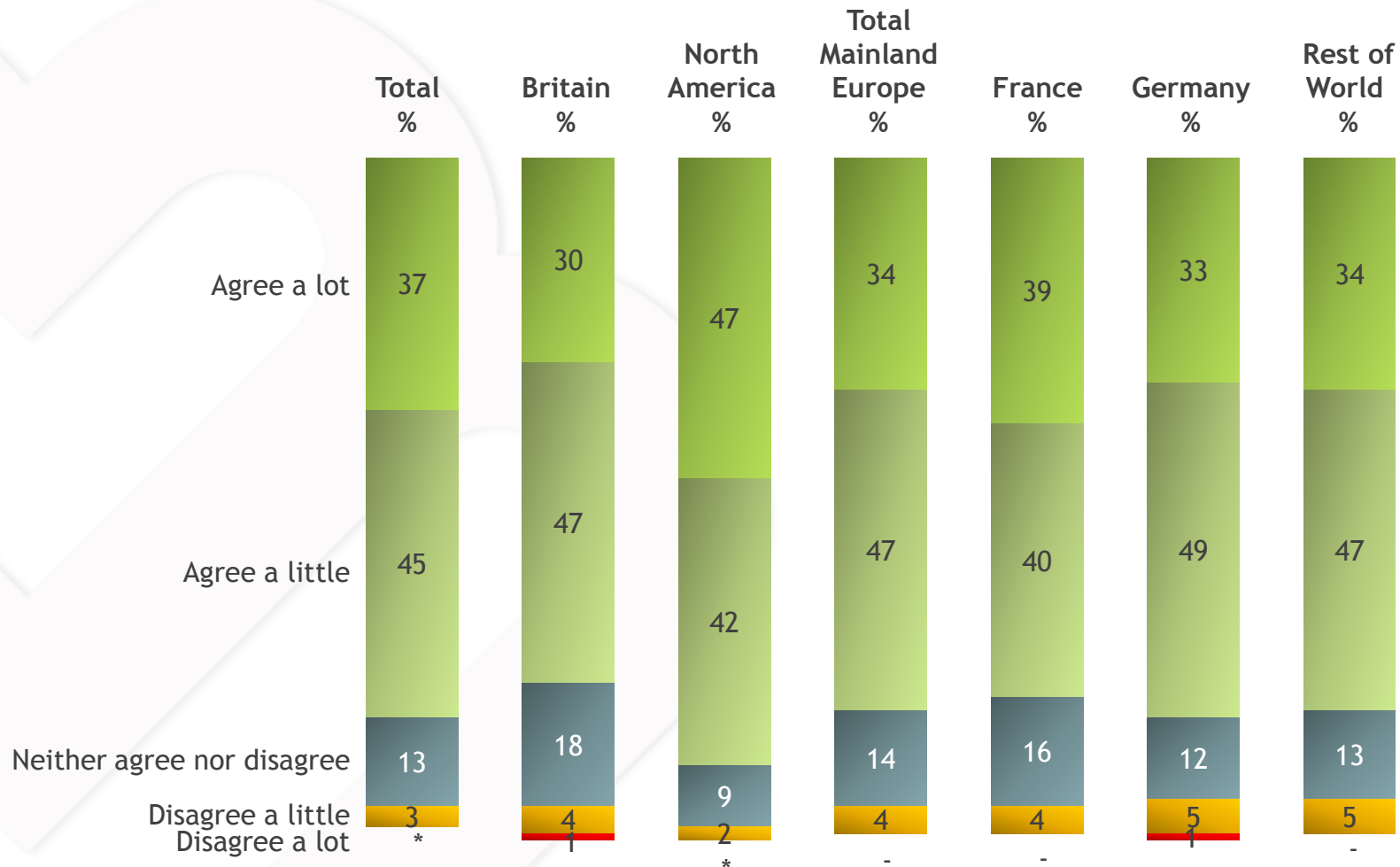


Agreement With Statements About Ireland



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 % |
|---------------------------|---------|-----------|-----------------|-------------------------|----------|-----------|-----------------|
| Happy | 22 | 22 | 19 | 23 | 34 | 17 | 29 |
| Relaxed | 18 | 24 | 13 | 19 | 23 | 27 | 14 |
| Tired | 14 | 19 | 17 | 9 | 6 | 10 | 13 |
| Satisfied | 11 | 8 | 14 | 11 | 6 | 8 | 10 |
| I want to come back | 5 | 5 | 6 | 4 | 6 | 3 | 10 |
| Sad | 4 | 1 | 5 | 5 | 4 | 6 | 4 |
| Irish people are friendly | 3 | 2 | 3 | 3 | 4 | 1 | 2 |
| Enjoyed it | 3 | 4 | 2 | 3 | 4 | 2 | 3 |
| Rested | 1 | 1 | 1 | 1 | 1 | 2 | - |
| Enjoyed the pub | 1 | 1 | - | 1 | 1 | - | 1 |

Question: what words would you use to describe how you feel at the end of your trip to Ireland?

Overall Opinion of their Irish Holiday



Base: All Respondents

| | Total % | Britain % | North America % | Total Mainland Europe % | France % | Germany % | Rest of World % |
|---------------------------------|---------|-----------|-----------------|-------------------------|----------|-----------|-----------------|
| Matched expectations | 56 | 62 | 44 | 63 | 58 | 69 | 61 |
| Exceeded expectations | 42 | 37 | 55 | 35 | 40 | 30 | 39 |
| Did not live up to expectations | 1 | 1 | 1 | 1 | * | 1 | - |

The Reasons Why Expectations Exceeded

Base: 781 Respondents

| | Total % | Britain % | North America % | Total Mainland Europe % | France % | Germany % | Rest of World % |
|---|---------|-----------|-----------------|-------------------------|----------|-----------|-----------------|
| Irish people | 69 | 73 | 69 | 67 | 79 | 58 | 72 |
| Scenery | 65 | 49 | 77 | 59 | 61 | 65 | 59 |
| History/culture | 37 | 30 | 46 | 28 | 27 | 31 | 38 |
| Nature/wildlife/flora/fauna | 29 | 17 | 33 | 31 | 33 | 34 | 33 |
| Weather better than expected | 28 | 22 | 34 | 23 | 20 | 24 | 30 |
| Good food quality/variety | 27 | 24 | 36 | 19 | 19 | 16 | 17 |
| Well kept countryside/no litter/neat/ clean | 20 | 14 | 30 | 9 | 12 | 11 | 26 |
| Clean environment/no pollution | 20 | 15 | 26 | 13 | 17 | 18 | 30 |
| Activities - something for all | 19 | 14 | 27 | 11 | 15 | 10 | 19 |
| Good accommodation/range/quality | 18 | 20 | 26 | 7 | 6 | 6 | 19 |
| Relaxing/slow/easy going | 17 | 20 | 20 | 11 | 13 | 9 | 26 |
| Good internal transport | 9 | 10 | 13 | 3 | 3 | 3 | 8 |

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 | 6 | 13 | 3 | 5 | 7 | 3 | 3 |
| Definitely - I'll be back next year | 19 | 39 | 7 | 19 | 18 | 15 | 19 |
| Definitely - I'll be back in the next few years | 39 | 30 | 45 | 40 | 46 | 47 | 37 |
| I hope so - at some time in future | 32 | 16 | 42 | 32 | 25 | 31 | 34 |
| Probably not | 2 | 1 | 3 | 2 | 2 | 2 | 5 |
| Definitely not | * | * | - | * | - | - | 1 |
| Don't know | 1 | * | * | 2 | 2 | 1 | 2 |

Advantages - Most Frequently Mentioned

Base: All Respondents

| | Total % | Britain % | North America % | Total Mainland Europe % | France % | Germany % | Rest of World % |
|------------------------------|---------|-----------|-----------------|-------------------------|----------|-----------|-----------------|
| The Irish people | 64 | 61 | 67 | 63 | 72 | 60 | 66 |
| The scenery | 53 | 43 | 61 | 51 | 52 | 58 | 60 |
| Culture/history | 38 | 30 | 51 | 32 | 34 | 31 | 44 |
| English speaking | 32 | 37 | 43 | 22 | 20 | 23 | 27 |
| Nature/ecology | 29 | 11 | 31 | 37 | 27 | 48 | 28 |
| Drinks/pubs/pub culture | 28 | 24 | 30 | 28 | 26 | 31 | 30 |
| Access/easy to get to | 21 | 35 | 19 | 15 | 18 | 15 | 21 |
| Interesting towns/villages | 19 | 12 | 28 | 13 | 17 | 16 | 29 |
| Unspoilt environment | 16 | 14 | 21 | 13 | 17 | 18 | 18 |
| Restful/relaxing | 12 | 11 | 13 | 12 | 12 | 15 | 15 |
| Ancestral/family connections | 9 | 9 | 17 | 2 | 2 | 1 | 11 |
| No advantages | 1 | 2 | 1 | 1 | 1 | 1 | 1 |
| Don't know | 1 | 1 | 1 | 2 | 1 | 2 | - |

Disadvantages - Most Frequently Mentioned

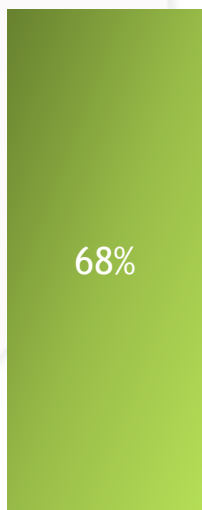
Base: All Respondents

| | Total % | Britain % | North America % | Total Mainland Europe % | France % | Germany % | Rest of World % |
|--|---------|-----------|-----------------|-------------------------|----------|-----------|-----------------|
| Weather | 28 | 27 | 20 | 34 | 39 | 27 | 28 |
| High cost of living/expensive | 10 | 10 | 9 | 10 | 8 | 11 | 10 |
| Drink costs | 8 | 11 | 4 | 9 | 9 | 12 | 6 |
| Driving difficult | 8 | 1 | 13 | 9 | 12 | 10 | 4 |
| Food costs | 6 | 5 | 4 | 8 | 7 | 13 | 5 |
| Bad roads/poor condition/lack of motorways | 5 | 4 | 6 | 5 | 5 | 5 | 5 |
| Accommodation costs | 5 | 4 | 5 | 4 | 5 | 3 | 8 |
| Poor signposting | 4 | 5 | 6 | 3 | 4 | 4 | 8 |
| High cost i.e. souvenirs | 3 | 4 | 2 | 3 | 3 | 4 | 4 |
| Food - poor quality/lack of variety | 3 | 1 | 2 | 4 | 4 | 2 | 3 |
| Exchange rates | 2 | 1 | 4 | * | * | * | 9 |
| No disadvantages | 39 | 44 | 44 | 32 | 29 | 34 | 28 |
| Don't know | 1 | 1 | 1 | 1 | 1 | 1 | 1 |

Would Ireland be Recommended?

% giving a score of 9 or 10

Base: All Respondents



Yes,
definitely



| | % |
|-------------------|----|
| Britain | 66 |
| North America | 82 |
| Mainland Europe | 58 |
| France | 57 |
| Germany | 64 |
| Rest of the World | 64 |

Question: How likely would you be to recommend a holiday in Ireland to others, on a scale of 0 to 10, where 0 is definitely would not recommend and 10 is definitely would recommend?

Key Findings - I

Sources of information that influenced the choice and planning of the holiday in Ireland

- The internet is still the most important source of information when choosing to holiday in Ireland. This is followed by advice from friends, relatives and business associates. This holds across all markets.
- While the internet dominates as the main source of information when planning the holiday, other sources of information vary by market.
- Advice from friends, relatives and business associates comes second for British holidaymakers and those from long haul markets when planning their holiday in Ireland.
- Over a third of French (36%) and German (31%) holidaymakers rely on guide books. Holidaymakers from Europe are less likely to look to friends/relatives or business associates when organising their trip.
- North Americans tend to use travel agents/tour operators and guidebooks in equal measure (27%) when planning their holiday. Those from other long haul markets rely more on travel agents/tour operators (24%) than guide books (20%).

Key Findings - I

Internet channels that were important in choosing and also planning Ireland as the destination for a holiday

- Carrier sites (airlines/ferry companies) tend to be the most important internet sources of information when choosing a holiday in Ireland with review sites (eg, tripadvisor) a close second for three in ten holidaymakers.
- Notably, accommodation provider websites (eg, booking.com) are more popular than review sites among Europeans when choosing their Irish holiday. For long haul markets beyond North America, carrier sites are far less important with review and accommodation sites dominating.
- Not surprisingly, carrier and accommodation provider sites are most frequently used when planning the Irish holiday, with about two in five using carrier sites and one in three using accommodation provider sites. For North American holidaymakers, review sites are more important than accommodation sites - used by two in five respondents. Online travel agents are significantly more popular among long haul holidaymakers than those from Britain or Europe.
- Social Media and price comparison sites are used by just over one in ten across all markets when choosing/planning. The stand out exception are long haul markets other than North America where more than a quarter of respondents rate social media as important when choosing Ireland for a holiday.

Key Findings II

Factors that are IMPORTANT in considering Ireland for a holiday

- Holidaymakers consider friendly, hospitable people to be the most important factor when choosing Ireland as a holiday destination. This is important for all of the markets with over nine out of ten claiming this is key.
- A secure and safe destination is important for a considerable majority, particularly for holidaymakers from Britain and all our long haul markets.
- Beautiful scenery remains a very important factor along with a good range of natural attractions. A natural unspoilt environment and attractive cities and towns are seen as very important to holidaymakers and this is called out in particular by the French.
- Holidaymakers want to have plenty of things to do and see along with interesting history and culture.
- A relaxed and easy pace of life is important to the British, French and Germans.
- Eight out of ten are looking for value for money - in particular the British holidaymaker.

Key Findings - III

Satisfaction with aspects of Ireland - SATISFIED

- Almost all respondents expressed satisfaction with the hospitality and friendliness of the people, particularly those from North America and Germany
- Over nine in ten holidaymakers are happy that Ireland a safe and secure destination.
- More than nine out of ten enjoyed the beautiful scenery and natural, unspoilt surroundings. Similar levels of satisfaction are expressed for our range of natural attractions and attractive cities and towns.
- Nine out of ten are satisfied with the easy and relaxed pace of life.
- Our history and culture reaches high levels of satisfaction and one in eight are satisfied that Ireland is suitable for touring.
- Over three quarters claim that air and sea fares are competitive, the French are marginally less satisfied.
- Overall value for money is seen as either very good or good by well over half of holidaymakers with over seven out of ten North Americans rating overall value for money is very good or good.

Key Findings IV

Agreement with statements about Ireland

- Seven in ten holidaymakers agree a lot that Ireland has an interesting history and culture to discover. As in 2014 this is highest among North American holidaymakers at 85%. Over two thirds claim that Ireland has given them unforgettable memories to share with family and friends, those from long haul markets are particularly enthusiastic about this aspect of their Irish holiday.
- There is lots to do on holidays in Ireland according to two thirds of holidaymakers, rising to three quarters of North Americans.
- More than six out of ten agree that there are many places in Ireland with stories to share. Over three quarters of American holidaymakers endorse this statement, and a similar proportion believe that Ireland has a unique and appealing culture.
- Over half of respondents strongly agree that Ireland has plenty of opportunities to enjoy revitalising outdoor activities and experiences. British and French holidaymakers are less convinced, while six in ten North American agree strongly.
- Nearly seven out of ten North Americans believe that Irish cities are lively and fun places to visit, with just under half the British agreeing a lot with this statement. Nearly four out of ten American holidaymakers agree that Irish cities have a varied nightlife to suit all tastes
- Over a third agree (a lot) that Ireland is different to anywhere else they have been before and in fact across the markets, around eight in ten express some level of agreement with this statement.

Key Findings V

How holidaymakers felt at the end of their trip to Ireland

key words used to describe holidaymakers' feelings

- The most popular word used was **happy** and this was across all main markets but most noticeably by the French.
- This was followed by **relaxed**, this was felt more by the French and Germans than the North Americans!
- Interestingly **tired** was the third most popular word holidaymakers used to describe how they felt with one in five British holidaymakers claiming to be tired!
- Holidaymakers also claimed to be **satisfied** and **want to come back**.

Overall Expectations

- Over **half of holidaymakers** claimed that their holiday **matched** their expectations, and over **four out of ten** claimed that their holiday **exceeded** their expectations.
- Similar to the 2014 VAS, the main reasons given are the Irish people, the scenery, history and culture, and even the weather was 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

- Nearly four out of ten respondents said that they would definitely return to Ireland in the next few years. This was highest among the French, German and North American holidaymakers.
- On a scale of 0-10, (where 0 is definitely would not recommend and 10 is definitely would recommend), almost seven in ten gave Ireland a ringing endorsement of 9 or 10. This rises to more than eight out of ten among North American holidaymakers. The French are more cautious with just under six out of ten promising a definite recommendation.

Key Findings VII

Advantages & disadvantages that distinguish Ireland from other similar holiday destinations

When asked, only **1%** of holidaymakers said Ireland had **no advantages** as a holiday destination, **39%** said Ireland had **no disadvantages**.

ADVANTAGES

- Irish People
- The scenery
- Culture & History
- English Speaking
- Nature & Ecology
- Drinks/pubs/pub culture
- Easy to get to
- Interesting towns/villages
- Unspoilt environment
- Restful & relaxing
- Ancestral/family connections

DISADVANTAGES

- Weather
- High cost of living/expensive
- Drink costs
- Driving difficult
- Food costs
- Bad roads/poor condition/no motorways
- Accommodation costs
- Poor signposting
- High costs i.e. souvenirs
- Food - lack of variety, poor quality
- Exchange rates

Overall Conclusions - I

- Holidaymakers to Ireland hope to meet friendly and welcoming people. They want to experience an easy and relaxed pace of life along with an unspoilt environment, beautiful scenery and plenty to do and see in a safe and secure destination. These expectations are being met as holidaymakers claim to be very satisfied with these key motivations.
- History and culture are important for holidaymakers, who recognise Ireland's unique culture.
- There is an strong sense of agreement among all holidaymakers that Ireland has a rich heritage around story telling/sharing stories.
- Overseas holidaymakers' primary source of information for their holiday is online along with advice from friends/family.

Overall conclusions - II

- In the main holidaymakers to Ireland are satisfied with value for money.
- At the end of their holiday, respondents claim to be happy, and relaxed.
- The expectations of their holiday have been met and in many instances exceeded.
- Almost seven out of 10 say that they would definitely recommend Ireland for a holiday
- So in summary overall overseas holidaymakers have had a memorable and fulfilling holiday to Ireland in 2015 with over 90% claiming that they hope return at some point in the future.

Visitor Attitudes Survey

Main Markets 2015

