



Visitor Attitudes Survey - Main Markets 2013

 **MillwardBrown**

41112394/MR



Fáilte Ireland
National Tourism Development Authority

Information Sources that Influenced Choice of Ireland



Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Internet	64	61	64	66	67	58	67
Friends/relatives/business associates	36	37	36	35	25	32	37
Guide books	24	14	25	31	35	30	17
Travel Agent/ Tour Operator	16	5	23	14	9	21	21
Other brochures/promotional literature on Ireland	6	3	5	8	8	7	5
Advertising for Ireland	5	6	3	6	8	3	1
Irish Tourist Board literature	5	4	4	6	4	8	2
Travel programme on TV/radio	3	3	3	4	4	4	6
Films/movies	3	1	3	3	3	2	4
Articles in newspapers/magazines	3	2	2	4	3	7	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	72	69	70	74	81	69	73
Guide books	19	12	19	23	29	23	21
Friends/relatives/business associates	18	25	16	17	14	12	17
Travel Agent/ Tour Operator	16	3	23	15	9	22	23
Other brochures/promotional literature on Ireland	4	2	3	5	9	5	3
Irish Tourist Board literature	4	4	5	3	4	2	8
Articles in newspapers/magazines	2	2	3	1	2	1	1

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 %
User generated content from sites such as blogs or trip advisor	36	28	45	31	25	32	44
www.discoverireland.com	27	23	33	25	27	24	29
www.tourismireland.com	12	11	15	12	17	15	9

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 %
User generated content from sites such as blogs or trip advisor	32	28	35	31	25	33	34
www.discoverireland.com	20	19	25	17	24	13	24
www.tourismireland.com	12	10	16	10	14	13	8

Importance of Factors in Considering Ireland for a Holiday (I) - Very 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	92	89	92	95	94	94	91
Easy, relaxed pace of life	72	70	66	77	79	79	76
<u>Environment</u>							
Beautiful scenery	88	75	92	91	89	90	91
Good range of natural attractions	86	74	89	89	88	90	90
Natural, unspoilt environment	84	77	81	89	92	88	87
Attractive cities/towns	81	71	86	81	77	81	81
<u>Value/price</u>							
Good all round value for money	78	75	82	77	67	79	79
Competitively priced air and sea fares	75	67	77	78	67	81	75

Importance of Factors in Considering Ireland for a Holiday (II) - Very 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	85	76	89	87	85	88	91
Plenty of things to see and do	88	81	92	88	88	86	91
Interesting history/culture	82	67	87	84	87	84	90
Suitable for touring	75	64	80	75	78	73	80

Rating of Ireland on Destination Issues (I)

- Very 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	96	93	96	99	99	99	96
Easy, relaxed pace of life	89	86	90	88	93	91	93
<u>Environment</u>							
Beautiful scenery	96	92	97	97	98	95	94
Natural, unspoilt environment	89	84	89	90	90	92	91
Good range of natural attractions	90	85	91	91	93	90	89
Attractive cities/towns	88	84	92	87	87	87	87
Litter free/pollution free	82	83	85	77	78	78	88
<u>Value/price</u>							
Competitively priced air and sea fares	75	65	81	74	71	75	86

Rating of Ireland on Destination Issues (II)

- Very 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	94	90	94	95	93	95	95
Interesting history/culture	90	84	94	89	87	91	91
Suitable for touring	78	73	82	77	79	79	82



Overall Value for Money In ROI

Base: All Respondents

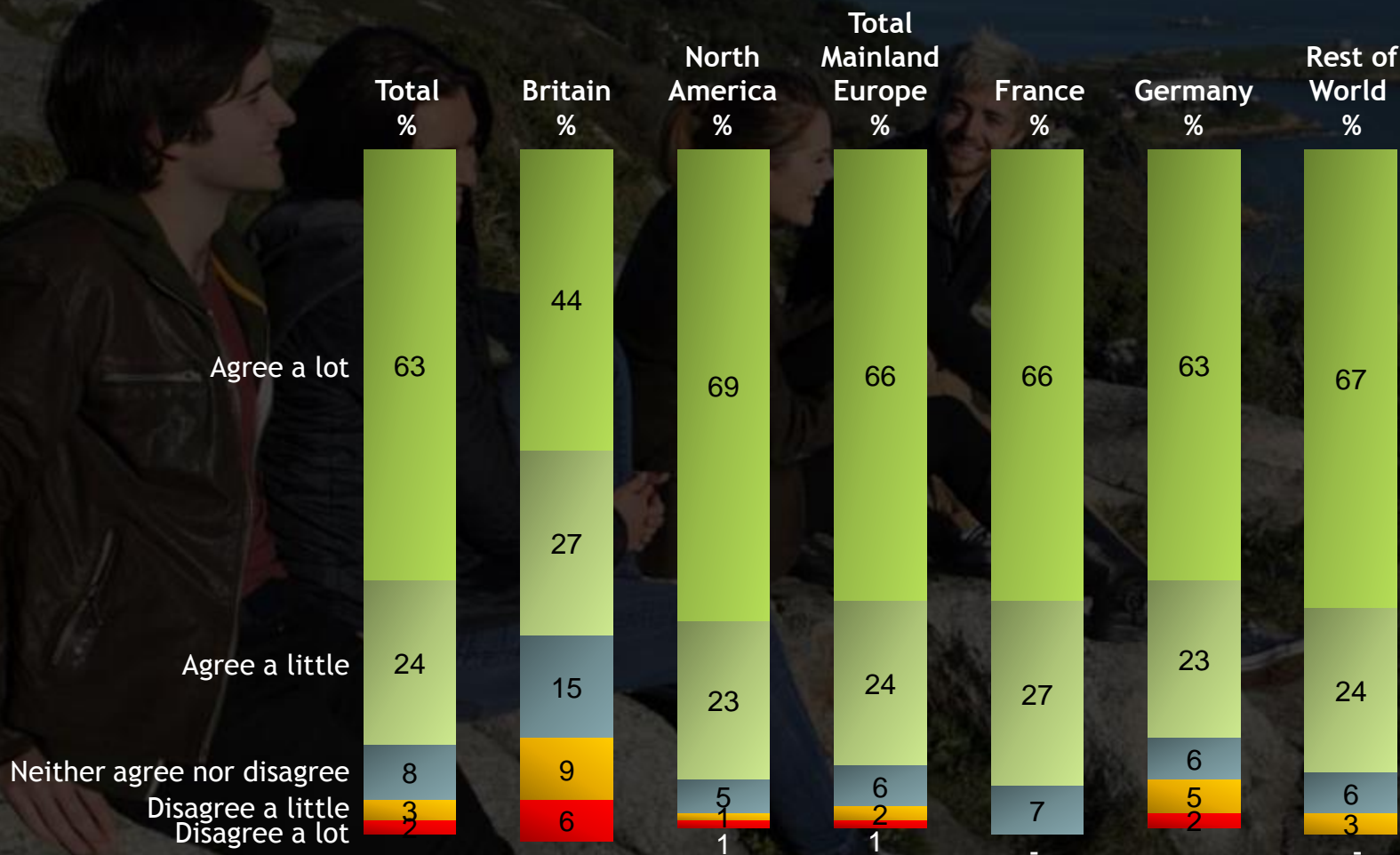
	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Very good	9	10	11	5	7	3	15
Good	42	33	45	46	35	41	39
Fair	39	43	36	39	45	44	43
Poor	7	10	5	8	11	12	3
Very poor	2	3	2	1	1	-	1

Agreement With Statements About Ireland



Base: All Respondents

'IS A NEW DESTINATION TO DISCOVER'

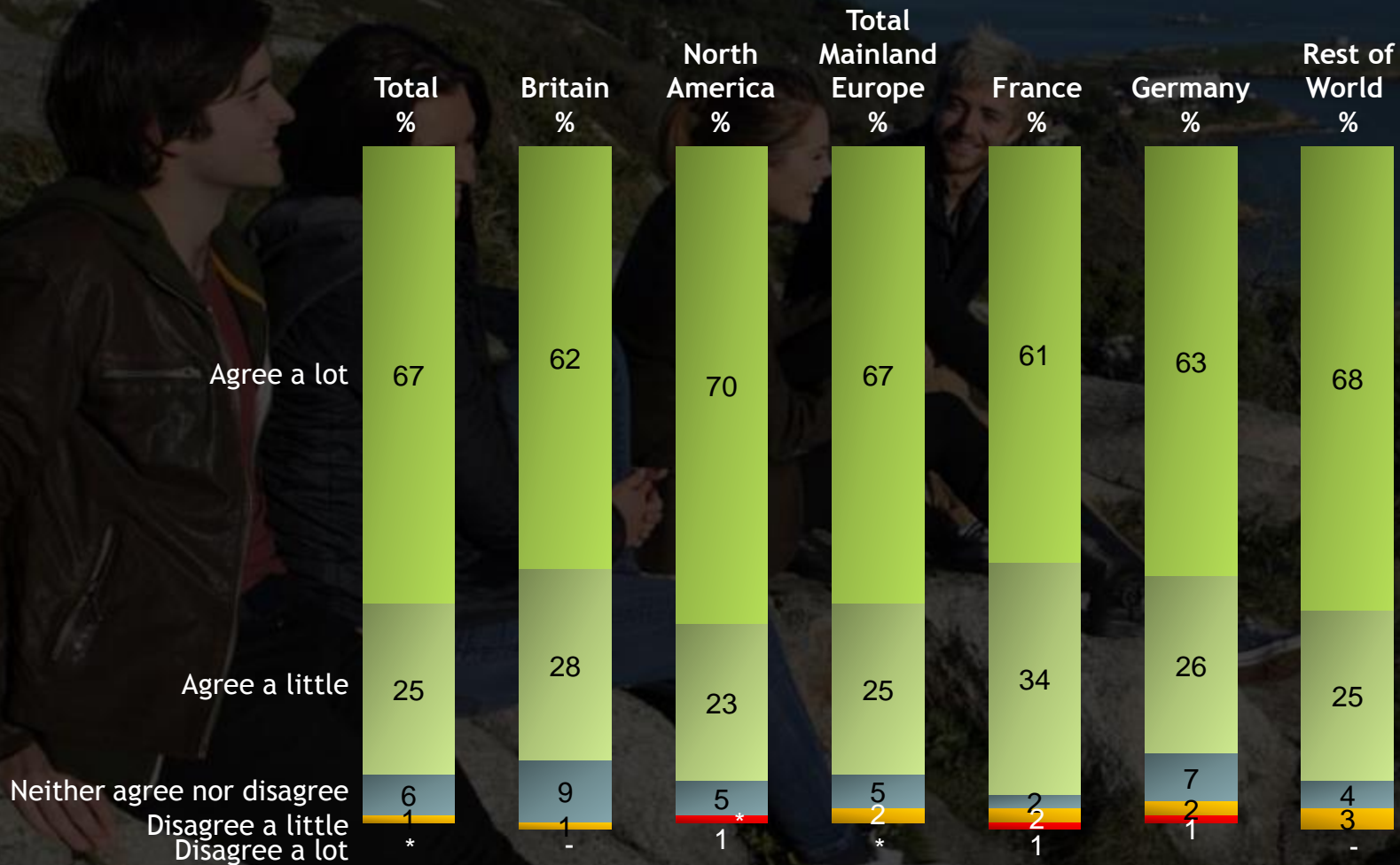


Agreement With Statements About Ireland



Base: All Respondents

'PROVIDES OPPORTUNITIES TO MEET/MIX WITH LOCAL PEOPLE'

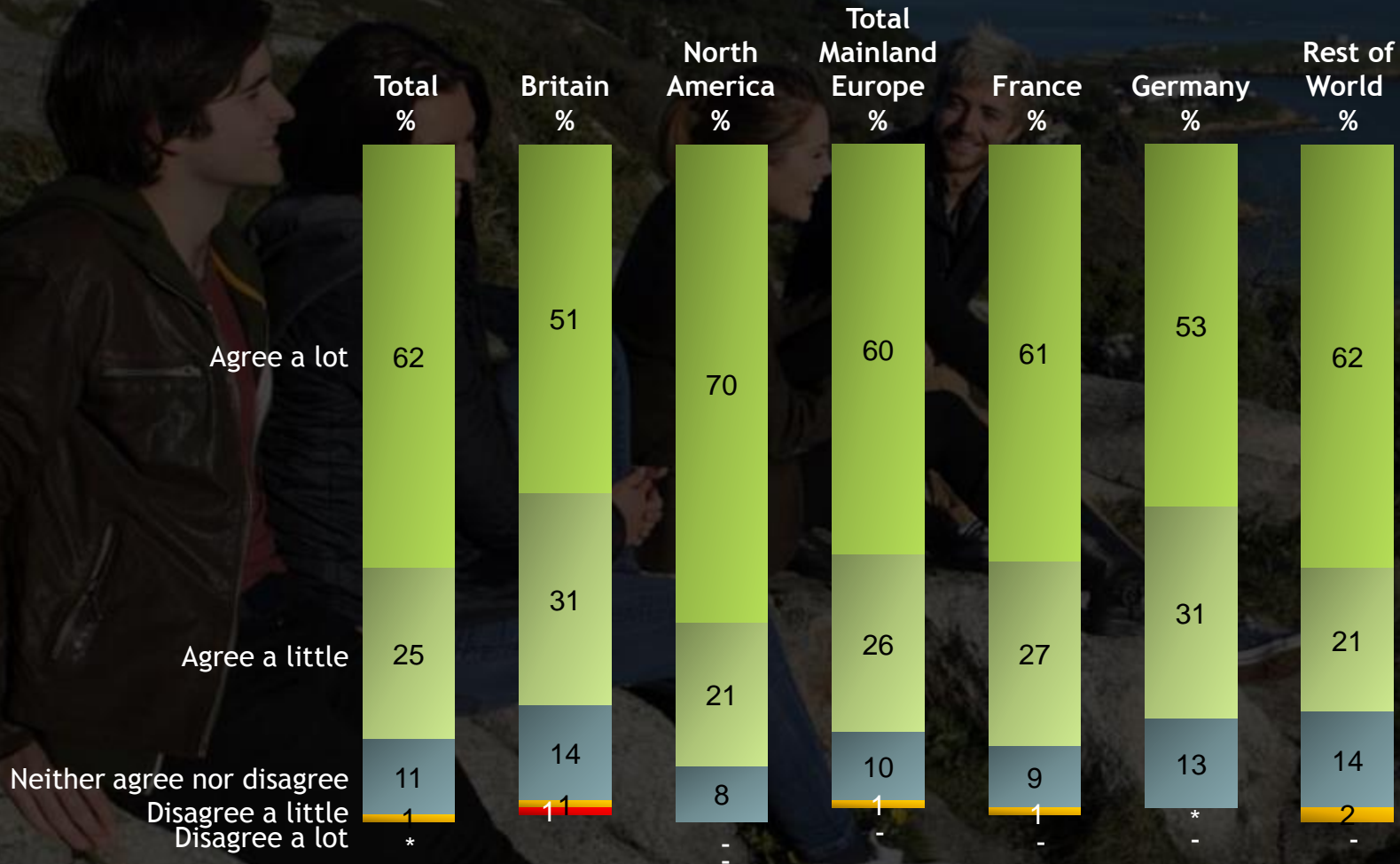


Agreement With Statements About Ireland



Base: All Respondents

'HAS GOOD EVENING ENTERTAINMENT AND NIGHTLIFE'

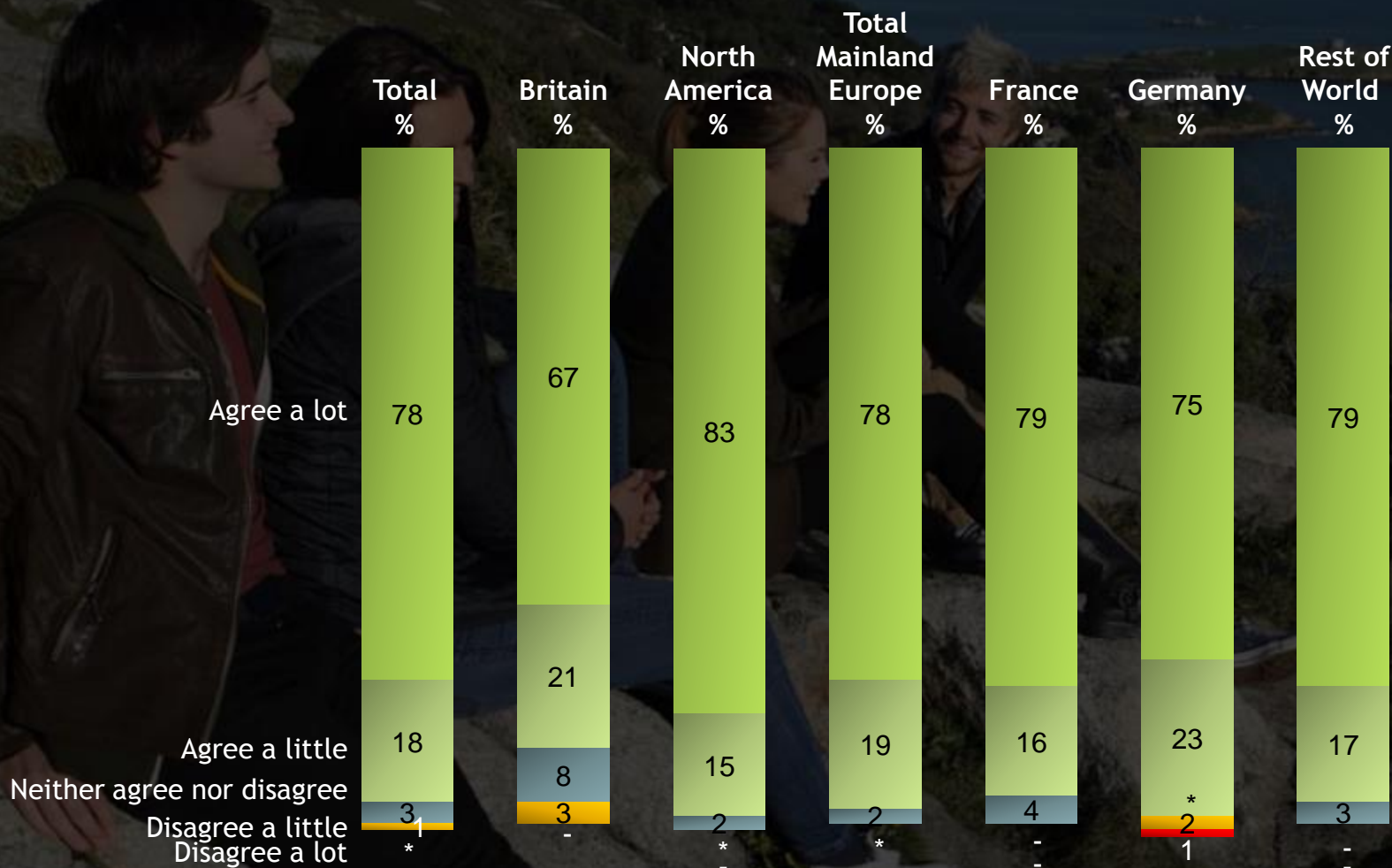


Agreement With Statements About Ireland



Base: All Respondents

'HAS PLENTY OF THINGS TO DO AND SEE'

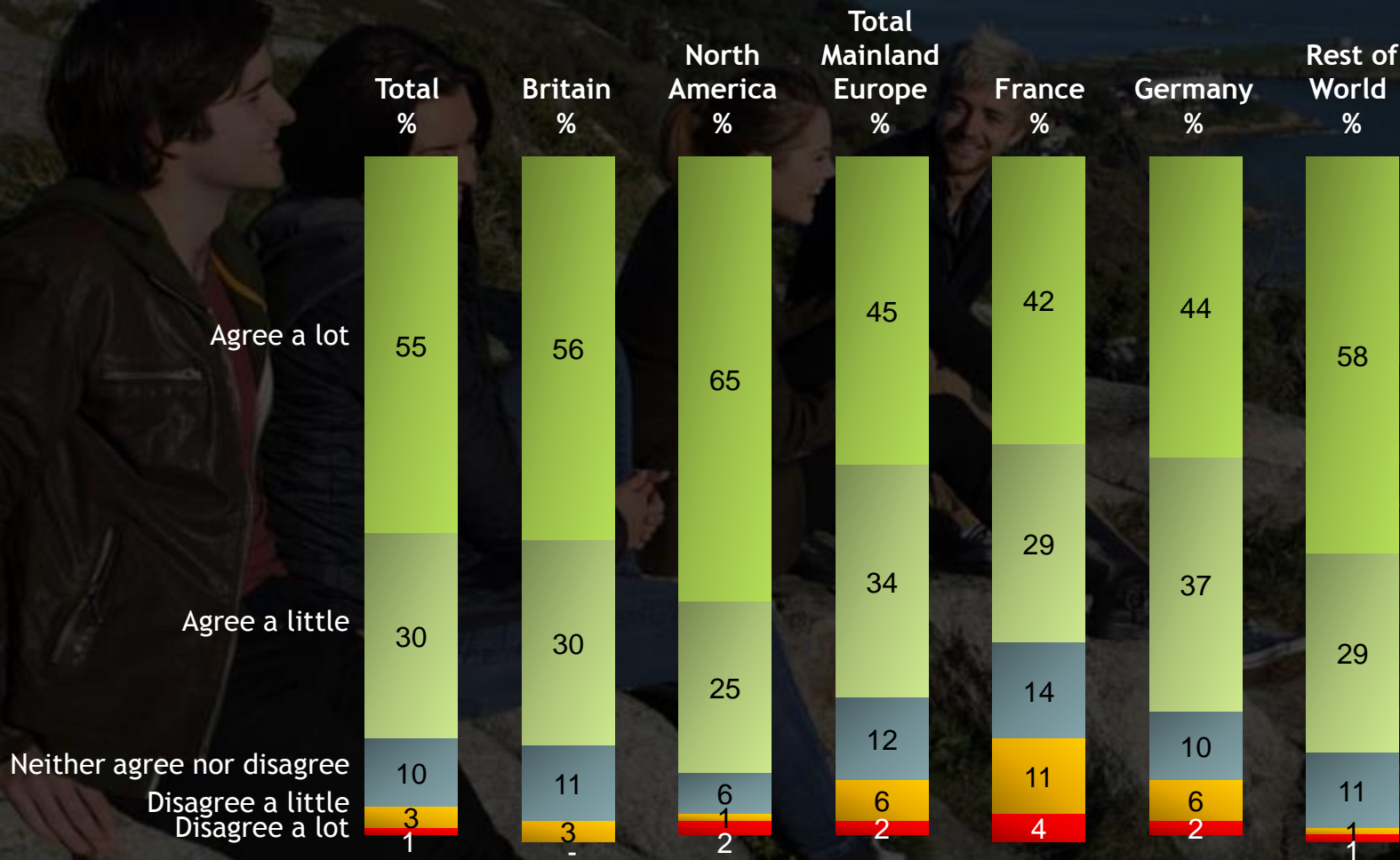


Agreement With Statements About Ireland



Base: All Respondents

'HAS A VARIETY OF HIGH QUALITY FOOD'

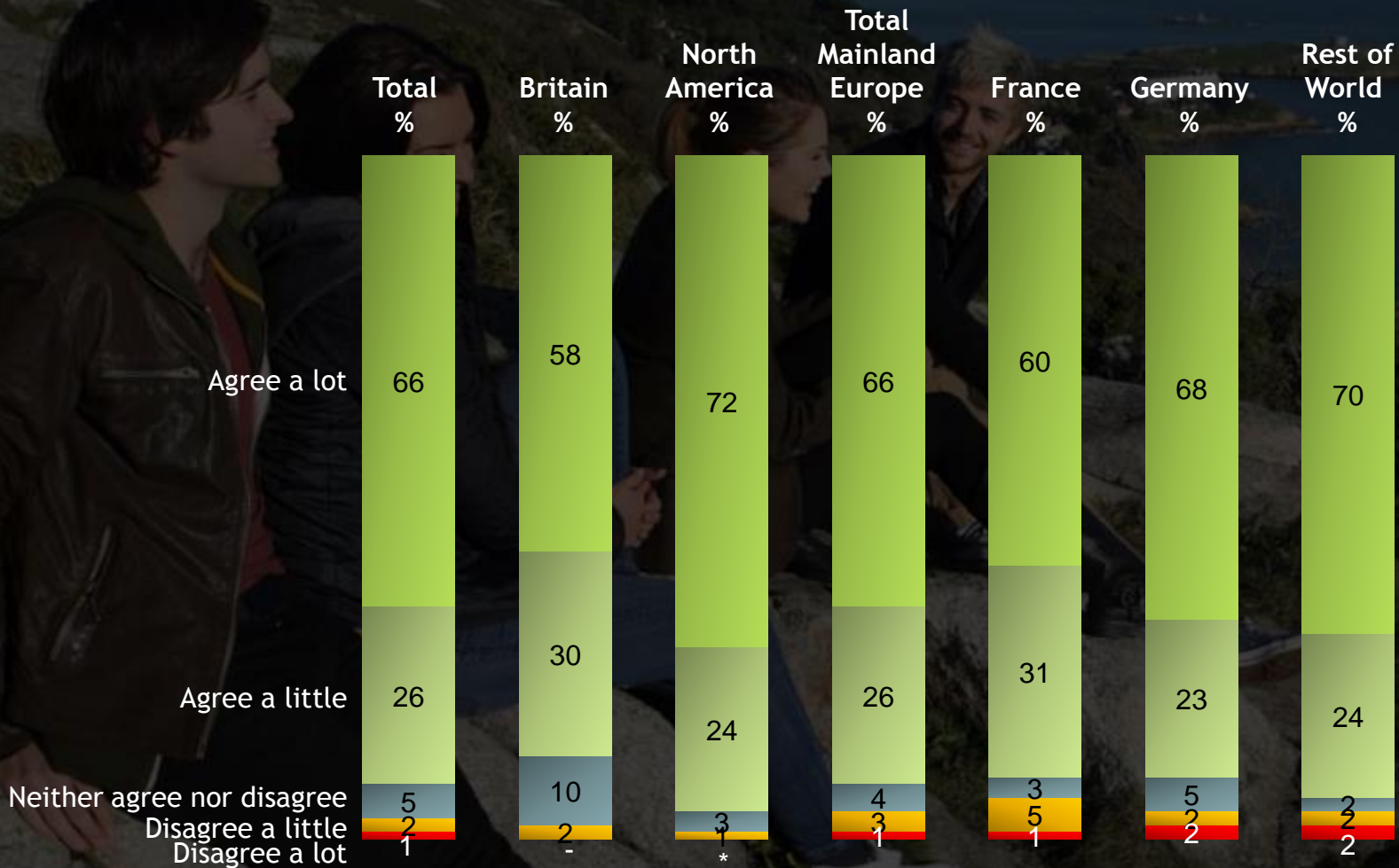


Agreement With Statements About Ireland



Base: All Respondents

'IRELAND IS A CLEAN & ENVIRONMENTALLY GREEN DESTINATION'



Advantages - Most Frequently Mentioned

Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
The Irish people	53	50	53	56	55	53	48
The scenery	46	42	45	49	51	49	46
Culture/history	38	26	39	41	39	45	41
Drinks/pubs	22	27	17	24	21	21	15
English speaking	20	22	27	13	20	7	18
Nature/Ecology	16	3	14	25	17	31	10
Interesting towns/villages	12	9	14	12	9	8	12
Access/easy to get to	12	21	8	13	17	12	4
Unspoilt environment	11	8	9	13	11	11	16
Ancestral/family connections	10	9	20	2	3	1	14
Restful/relaxing	9	14	7	7	9	4	10

Disadvantages - Most Frequently Mentioned

Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Weather	17	17	12	21	26	14	18
High cost of living	12	18	9	12	16	12	5
Drink costs	9	16	4	9	8	9	7
Food costs	9	14	8	9	12	12	4
Driving difficult	6	-	10	5	7	6	1
High cost i.e. souvenirs	4	7	3	5	4	3	-
Exchange rates	4	4	9	*	-	-	1
Bad roads	4	2	5	4	5	5	3
Food quality	2	1	2	3	7	3	1
Accommodation Costs	2	3	2	2	4	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	60	66	47	67	62	68	56
Exceeded expectations	39	32	52	32	35	30	40
Did not live up to expectations	1	1	1	1	2	1	2

The Reasons Why Expectations Exceeded

Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Irish People	68	62	71	65	66	54	72
Scenery	54	49	53	57	51	53	54
History/culture	31	30	27	35	30	28	32
Weather better than expected	30	33	28	34	36	38	17
Food quality/variety	21	22	24	16	8	17	22
Good accommodation	17	21	18	14	5	17	11
Well kept countryside/no litter/neat/ clean	13	8	22	6	2	3	4
Nature/wildlife/flora/fauna	12	6	10	18	24	19	6
Clean environment/no pollution	11	13	13	8	13	-	13
Relaxing/slow/easy going	9	11	11	7	5	5	5
Activities - something for all	8	3	10	7	5	5	9
Good internal transport	7	12	8	5	2	3	2

Would Ireland be Recommended?

Base: All Respondents



66%



Yes,
definitely



	%
Britain	61
North America	79
Mainland Europe	60
France	60
Germany	57
Rest of the World	55

Likelihood Of Returning For Another Holiday

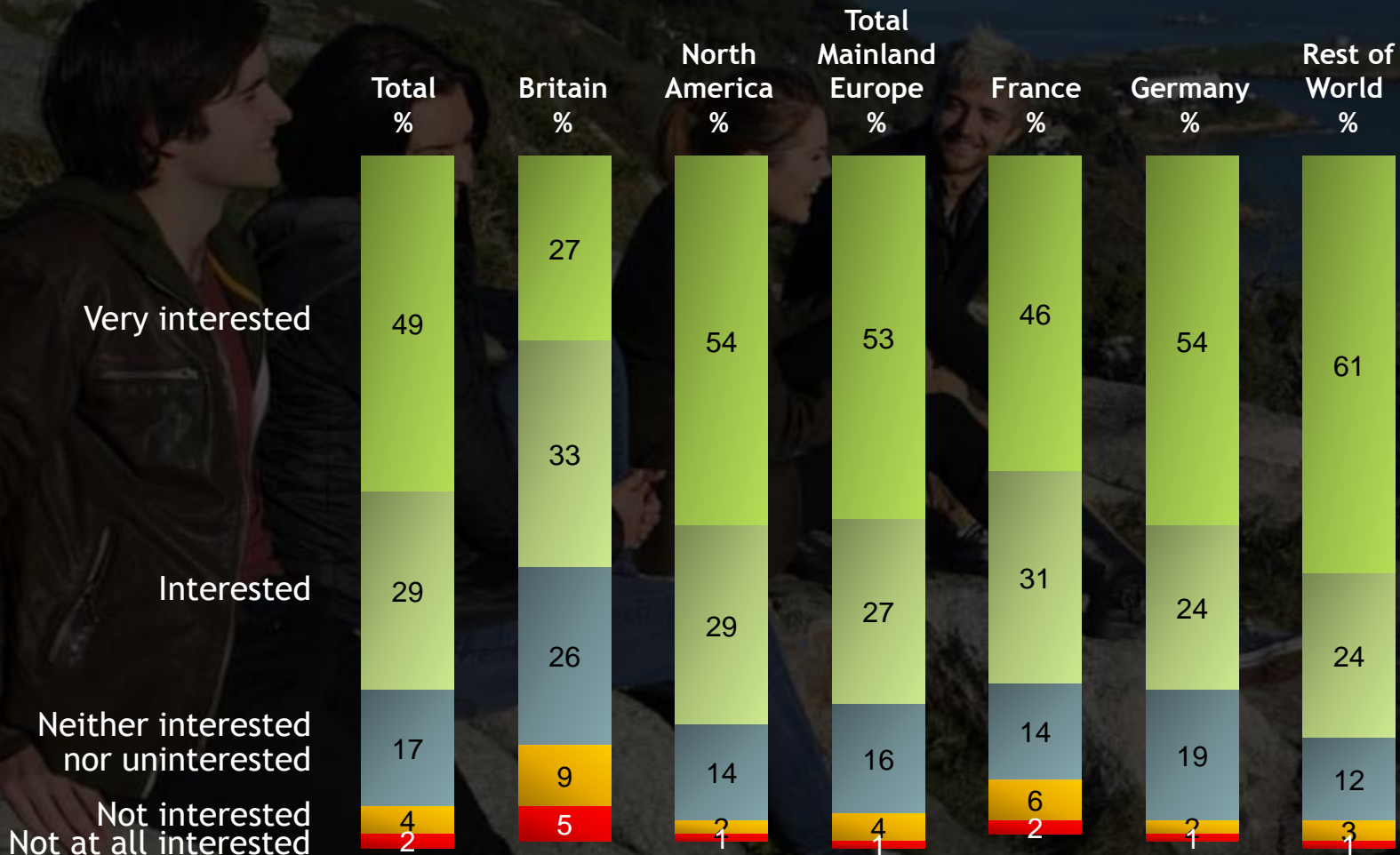
Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Definitely - I'll be back later this year	6	15	4	4	3	3	1
Definitely - I'll be back next year	17	34	8	17	13	20	10
Definitely - I'll be back in the next few years	33	27	40	33	35	32	24
I hope so - at some time in future	39	22	44	41	46	39	54
Probably not	2	1	2	2	3	2	8
Definitely not	*	*	1	*	-	1	1
Don't know	1	*	1	2	1	4	1

Level of Interest in Historic Ireland

Base: All Respondents

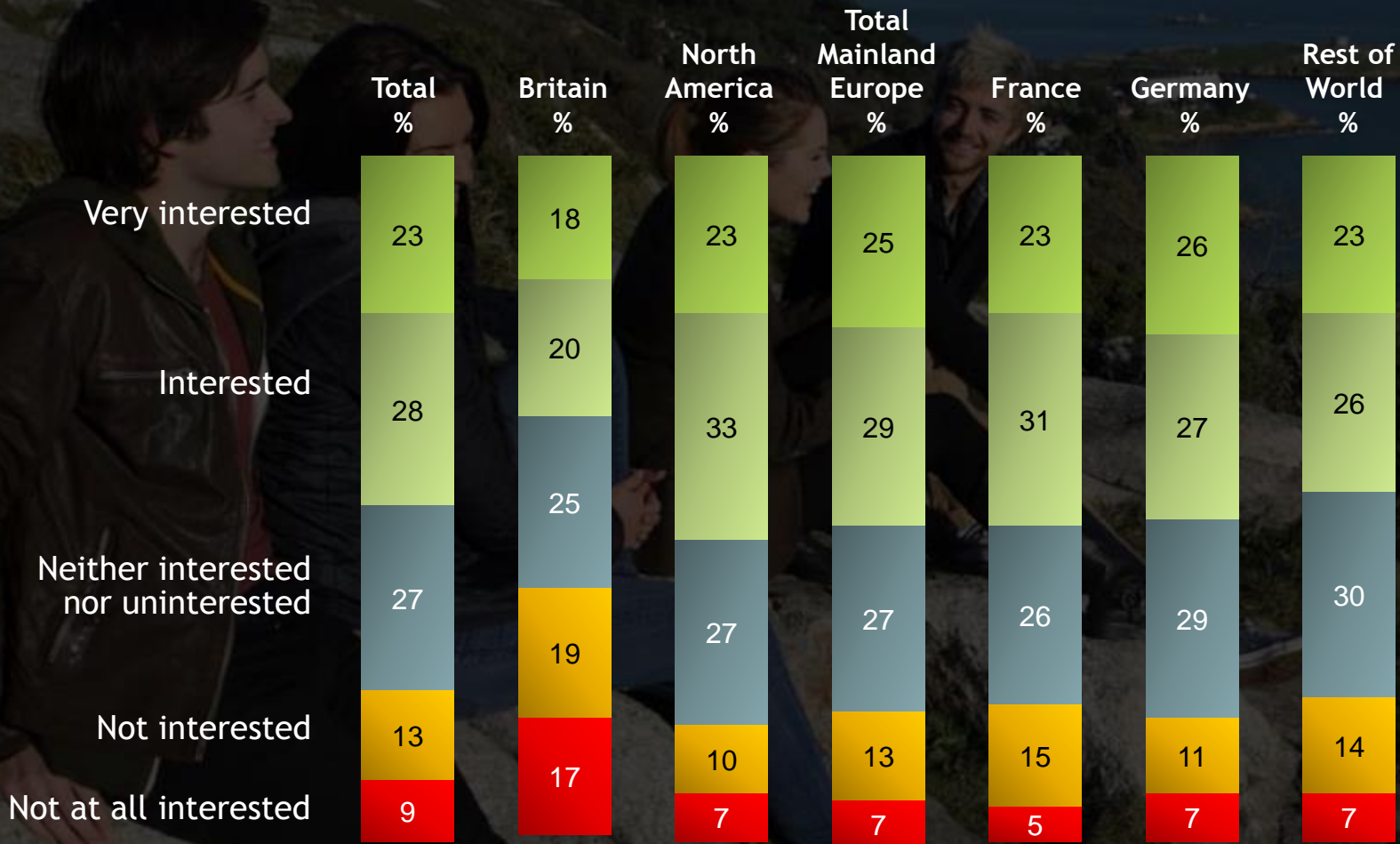
HISTORIC IRELAND: HISTORIC HOUSES, TOWNS, HERITAGE CENTRES, MUSEUMS ETC



Level of Interest in Christian Ireland

Base: All Respondents

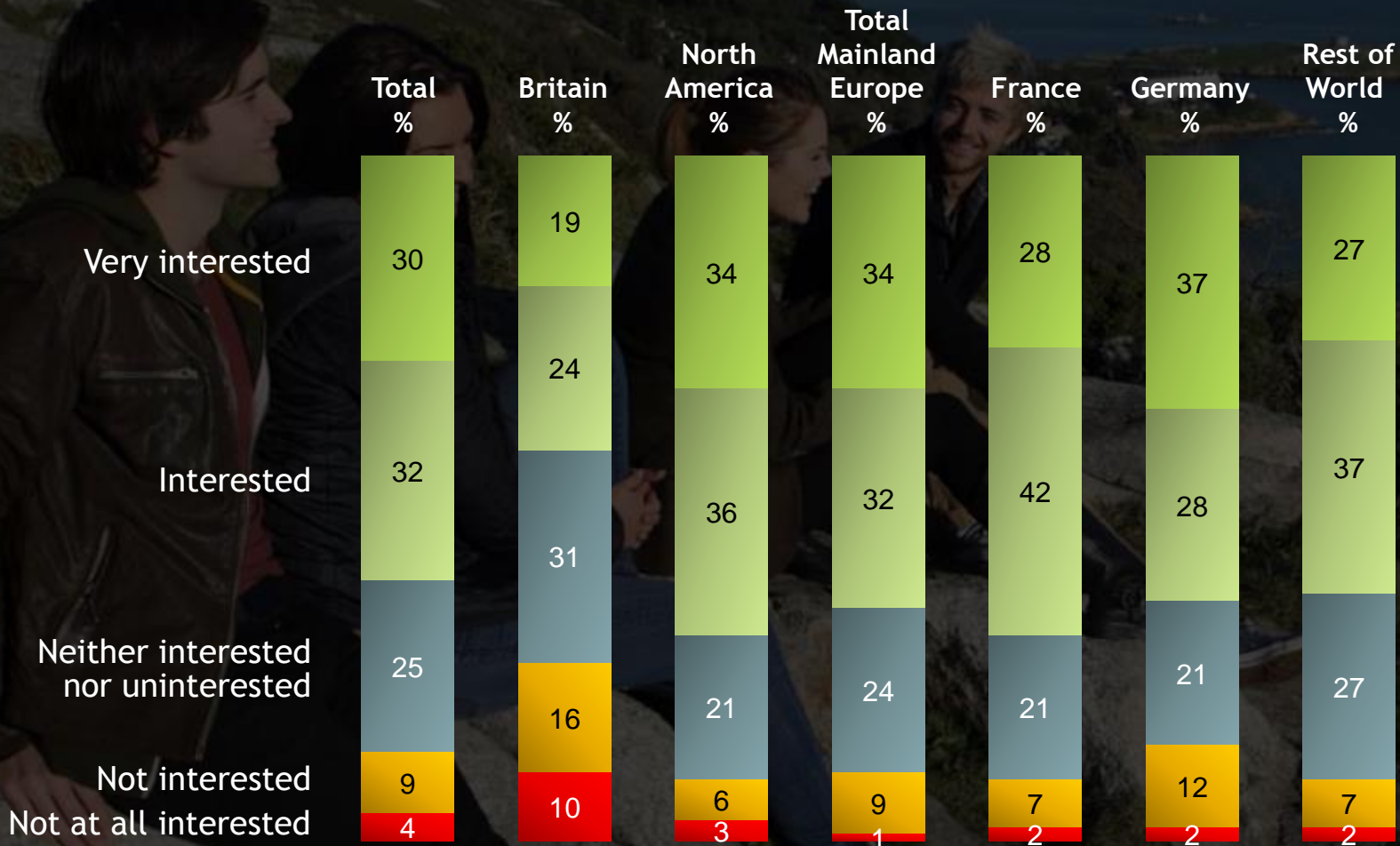
CHRISTIAN IRELAND: CHURCHES, ABBEYS, MONASTERIES ETC



Level of Interest in Celtic Ireland

Base: All Respondents

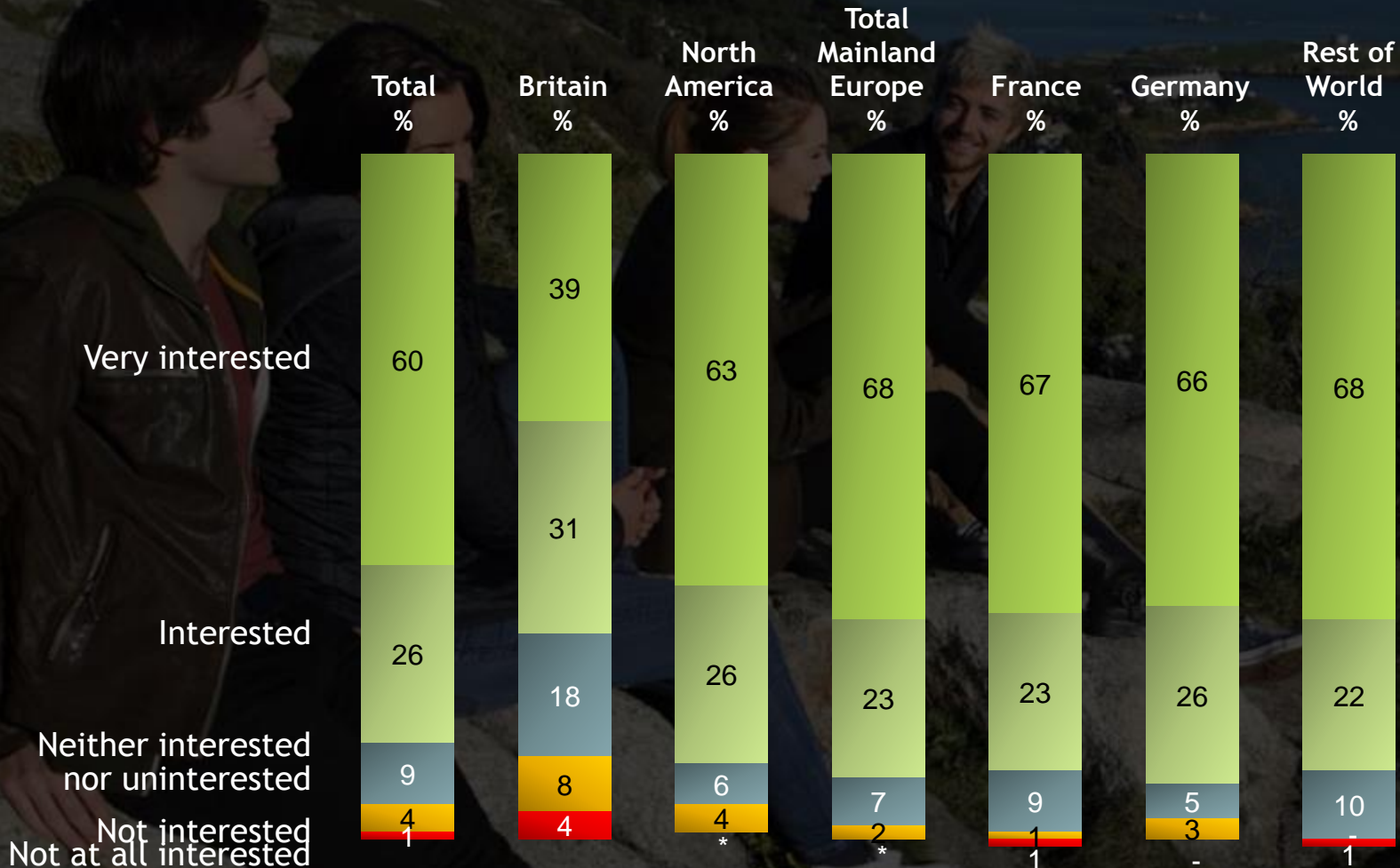
CELTIC IRELAND: CELTIC SITES, ARTIFACTS, LANGUAGE, MYTH AND LEGEND



Level of Interest in Natural Ireland

Base: All Respondents

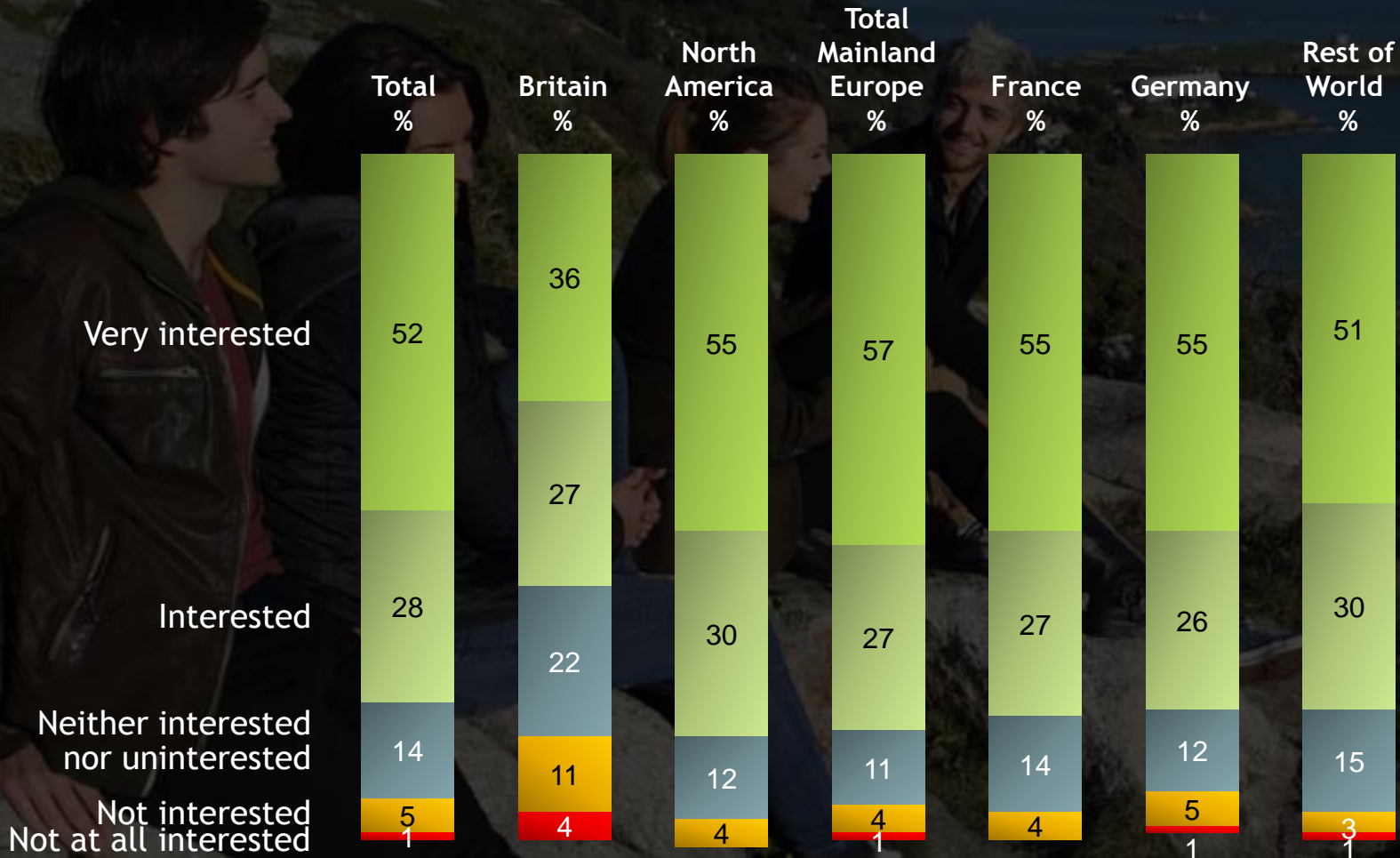
NATURAL IRELAND: NATURAL ATTRACTIONS SUCH AS THE BURREN, CLIFFS OF MOHER ETC



Level of Interest in Traditional Culture

Base: All Respondents

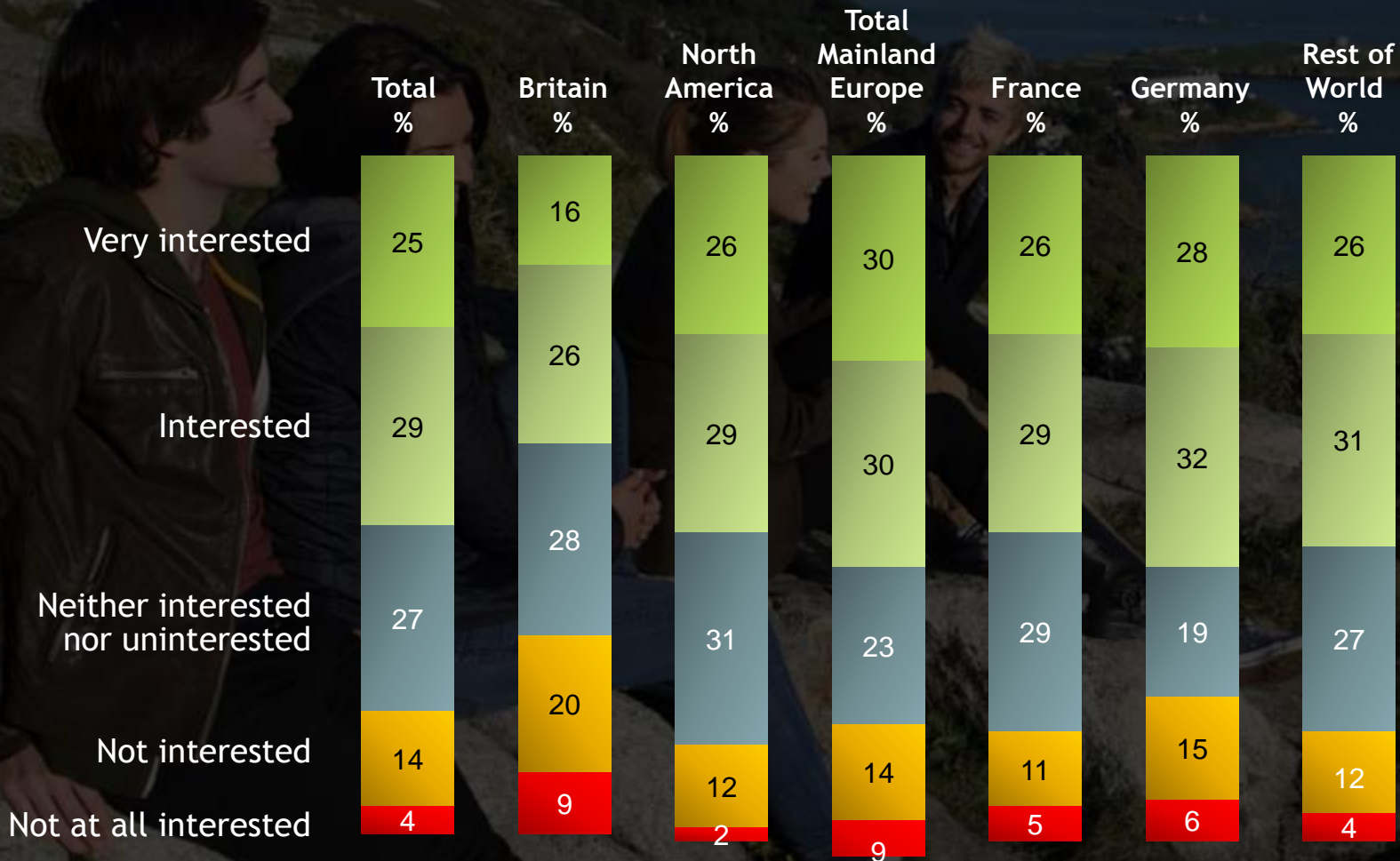
TRADITIONAL CULTURE: TRADITIONAL MUSIC, SONG, DANCE, IRISH LANGUAGE ETC



Level of Interest in Contemporary Culture

Base: All Respondents

CONTEMPORARY CULTURE: PERFORMING ARTS, VISUAL ARTS, CRAFTS, FILM, LITERATURE, ARCHITECTURE ETC



Desire to Experience the Following Influenced the Decision to Visit Ireland

Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
An Irish Pub	80	65	84	85	83	84	83
Dublin's Heritage and Culture	61	41	67	65	60	69	68
An Irish Castle	56	35	67	57	67	54	58
The Cliff's of Moher	46	19	57	50	53	53	46
The Ring of Kerry	37	24	39	41	43	41	40
Connemara	36	20	35	43	59	46	40
The Rock of Cashel	18	8	22	20	22	23	14

Participated or Visited While in Ireland

Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Listened to the live music in a pub	83	70	88	85	83	86	85
Visited a coastal town	82	73	85	83	81	86	83
Tasted Guinness	79	74	78	83	82	92	80
Visited a food or craft market	49	43	44	56	60	56	47
Taken part in a city tour	41	31	50	38	30	35	46
Followed a literary trail	11	9	12	12	16	9	12



Visitor Attitudes Survey Main Markets 2013

Methodology

- This research is based on 1,514 face to face interviews conducted with overseas holidaymakers to Ireland.
- The interviews took place between May and October 2013 at major air and sea ports in Ireland



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