

# Overseas Holidaymakers 2019: LET'S JOIN THEM ON THEIR JOURNEY



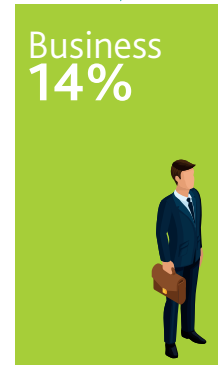
Fáilte Ireland  
Research

## Who are our Overseas Holidaymakers?<sup>1</sup>

More than half of overseas tourists who come to Ireland are on holiday.

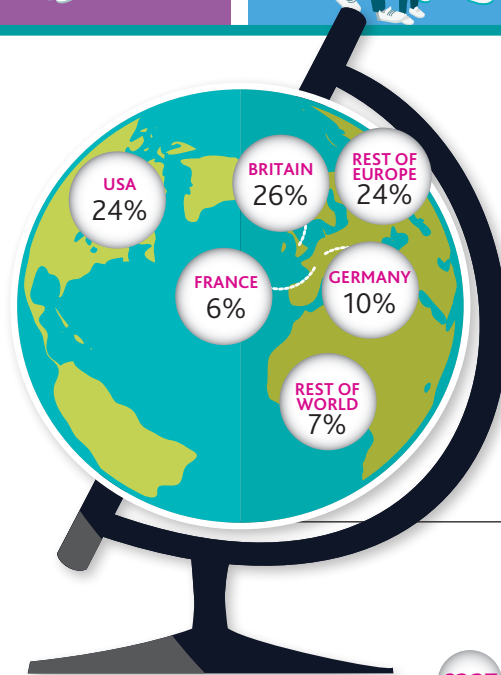
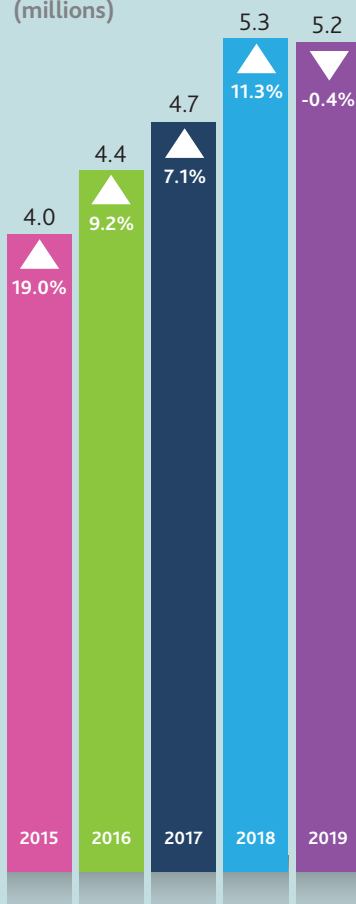


### TOURISTS STAY ONE OR MORE NIGHTS



In 2019 we welcomed as many holidaymakers to our shores as our resident population!

OVERSEAS HOLIDAYMAKERS (millions)



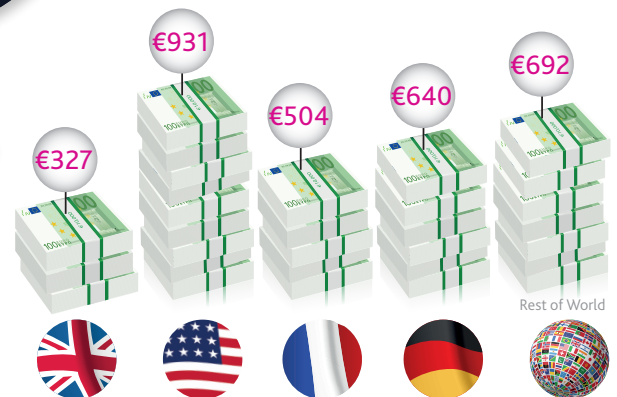
### 2019 OVERSEAS HOLIDAYMAKERS MARKET

Most of our holidaymakers don't travel far to get here. Two thirds come from Mainland Europe (40%) and Britain (26%).

Mainland Europe will be an important driver of tourism in the medium term as consumers change behaviours in response to COVID-19.

Long haul travellers are valuable to the Irish tourism economy as on average they stay longer and spend more. However, in the near future, people may be reluctant to travel far from home for leisure.

PER CAPITA SPEND BY OVERSEAS HOLIDAYMAKERS 2019



### TAKE AWAY

In response to restrictions and changing consumer behaviours arising from the pandemic, Ireland's short to medium term focus needs to target European markets such as Britain, France and Germany.

Ensure that your offering appeals to these core markets. It is particularly important that safety information relating to your business is highly visible online, and where possible in the relevant languages (e.g. French and German).

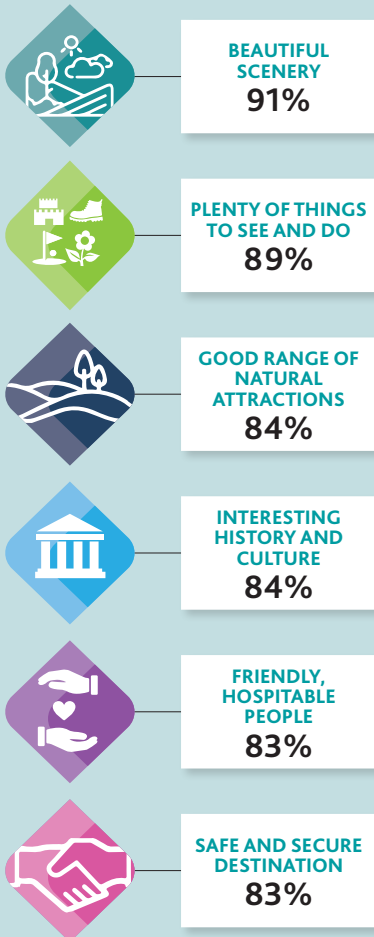
<sup>1</sup> Survey of Overseas Travellers 2019, main purpose holidaymakers  
Sources: Fáilte Ireland's Tourism Experience Survey at Ports 2019 and Survey of Overseas Travellers 2019

## Before Holidaymakers Arrive...



Beautiful scenery is the main motivation for travel for American, German and French holidaymakers when considering Ireland for a holiday. While for the British, friendly, welcoming people hold the most appeal. Other research confirms that while engaging with friendly people does not in itself motivate travel, it is an important experience enhancer.

### WHY CONSIDER IRELAND (Overseas Holidaymakers)



## CHOOSING AND PLANNING THEIR HOLIDAY

When **choosing** and deciding on a destination, holidaymakers rely extensively on recommendations from friends and family.

The internet is also important, particularly for French and German holidaymakers.

Guide books feature prominently as a valued source among non-English native speakers.

The French and Americans are more inclined to use social media as a source of information and this has increased notably in 2019 in these markets.

The internet is integral to **planning** a holiday; carriers, accommodation providers and review sites are most popular, particularly for Americans.

Other important channels when planning are advice from friends / family and guidebooks, particularly for the French and Germans.

Social media has grown among both the German and American markets in 2019.

SOURCES OF INFORMATION	Family / Friends		Internet		Guidebooks		Social Media	
	Choosing	Planning	Choosing	Planning	Choosing	Planning	Choosing	Planning
	Overseas Holidaymakers	51%	36%	46%	71%	20%	25%	14%
	59%	40%	40%	71%	11%	12%	12%	8%
	48%	36%	46%	74%	20%	25%	14%	13%
	53%	41%	49%	66%	34%	34%	15%	7%
	47%	32%	49%	70%	28%	35%	11%	11%

### CONSUMERS LOOK FOR INSPIRATION WHEN CHOOSING A HOLIDAY

Ensure that your customers' experience feels unique and that they feel it is worth re-telling to inspire others, either through recommendation and/or social media.

Share your local knowledge with your customers, call out photo opportunities, hidden gems, places to go or things to do that they can share with others.

### CONSUMERS LOOK FOR PRACTICAL INFORMATION WHEN PLANNING

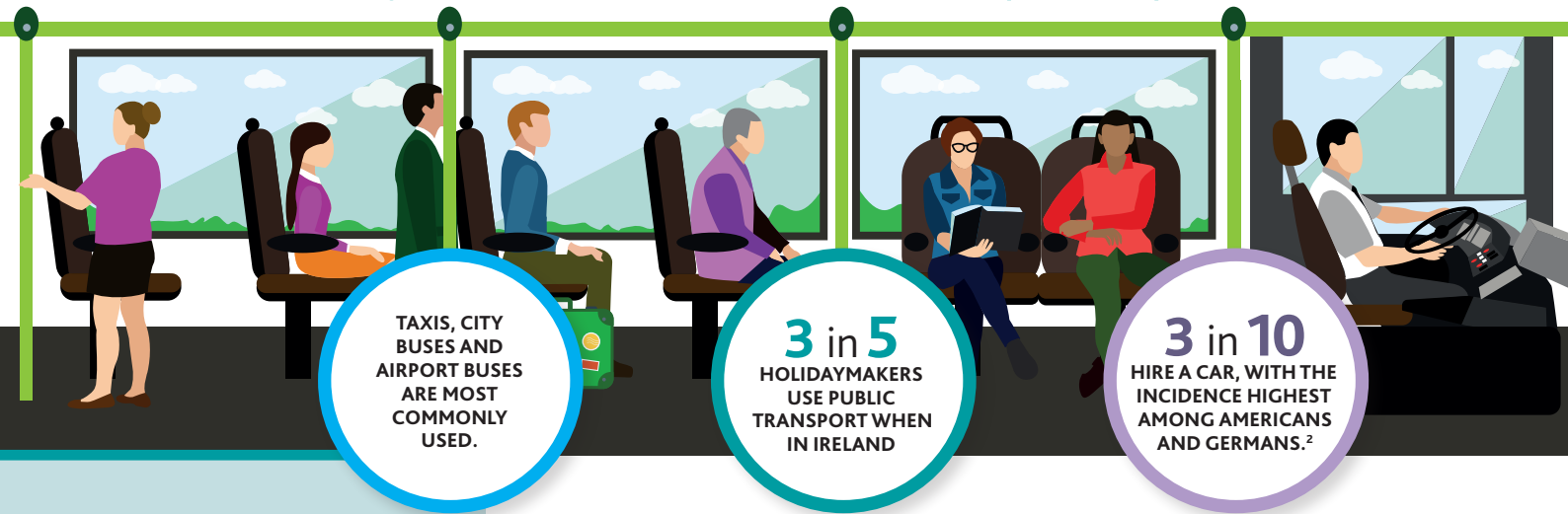
Does your website have all relevant practical information for your customers? Don't assume any local knowledge (address, telephone, opening hours, prices, access by public transport).

Consider having important practical information on your website available in foreign languages, particularly French and German.

TAKE AWAY



## When Holidaymakers are here – their transport experience



TAXIS, CITY BUSES AND AIRPORT BUSES ARE MOST COMMONLY USED.

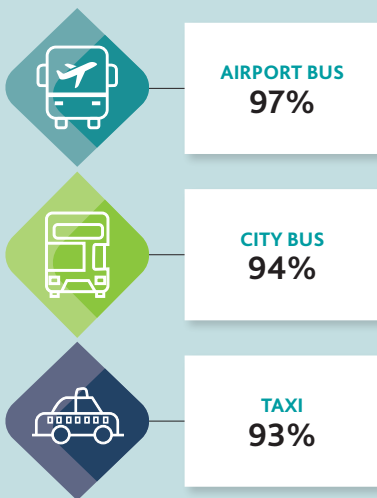
**3 in 5** HOLIDAYMAKERS USE PUBLIC TRANSPORT WHEN IN IRELAND

**3 in 10** HIRE A CAR, WITH THE INCIDENCE HIGHEST AMONG AMERICANS AND GERMANS.<sup>2</sup>

### SATISFACTION WITH PUBLIC TRANSPORT



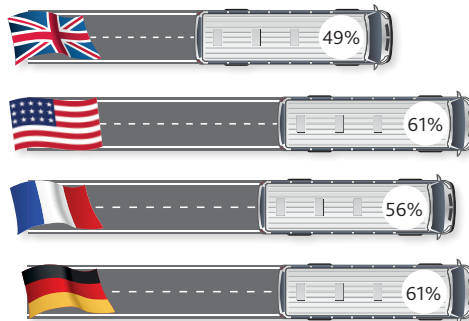
Those who use public transport tend to be satisfied<sup>1</sup> with their experience:



### PUBLIC TRANSPORT USAGE

British and French holidaymakers have direct sea access to Ireland, enabling them to bring their own transport. One in five use their own car (or a borrowed car). As a result, they are less likely to use public transport.

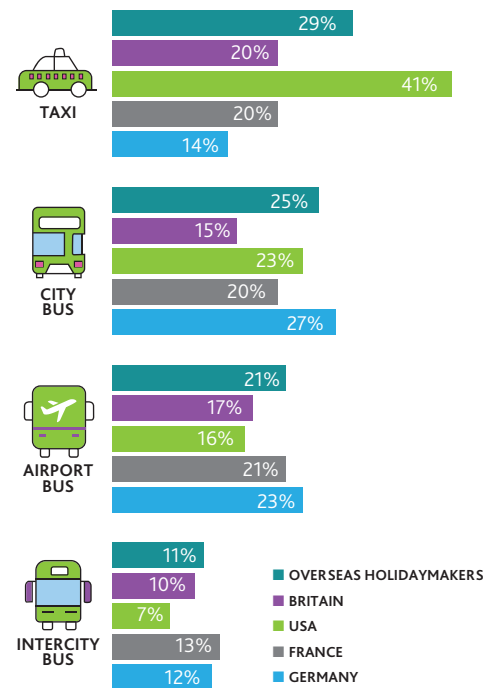
### PERCENTAGE OF HOLIDAYMAKERS USING PUBLIC TRANSPORT



When considering Ireland 56% claimed that it was important that the country was a manageable size for touring and exploring.

Once here, 90% of holidaymakers were satisfied with Ireland's suitability as a touring destination.

### TYPES OF PUBLIC TRANSPORT USED BY OVERSEAS HOLIDAYMAKERS



### TAKE AWAY

Direct your customers to available apps to get 'realtime' information to enhance their experience of public transport in your area.

Your marketing communications (online and off-line) should include details on how to arrive via road for those travelling by car (consider including the satellite navigation coordinates).

Link with other businesses to provide and promote local transport. For example, for customers arriving by car, make them aware (before and during their stay) of transport options to go out for a meal or evening entertainment locally.



1. Very/fairly satisfied  
2. Survey of Overseas Travellers 2019, main purpose holidaymakers  
Sources: Fáilte Ireland's Tourism Experience Survey at Ports 2019 and Survey of Overseas Travellers 2019

"It [Accommodation] was wonderful - the staff was incredibly friendly and helpful and went above and beyond my expectations."  
- B&B



"Outstanding because of the professionalism and friendliness of the staff" - HOTEL

"Lemon and Lime Bitters is my favourite... and they made that for me, even though it wasn't on the menu"



"...the more local, the better"

I enjoyed all the historic sites and learning about the history of Ireland.... The Blarney Castle and grounds were very enjoyable.



"Horse riding - the people at the stables were lovely and very helpful, wonderful experience"

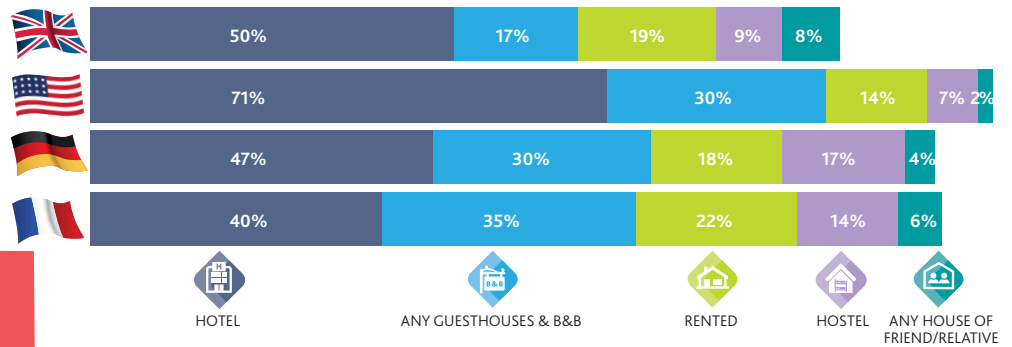
"I have had good experiences, because I feel safe and good informed about activities near my location"

TAKE AWAY

## When Holidaymakers are here...

### WHERE THEY STAY

Overseas holidaymakers tend to stay in paid serviced accommodation (51% stay in hotels, guesthouses or B&Bs). French and German holidaymakers tend to use a variety of accommodation types while those from the US and Britain are more likely to use hotels.



Engaging accommodation staff and the service they deliver is a stand out driver of satisfaction. Holidaymakers have very few complaints about their accommodation. Clear, practical information about accommodation and how to get there along with a good choice of quality accommodation types enhance their experience.

### THEIR FOOD EXPERIENCE

Two in five (38%) overseas holidaymakers rate their food experience as "excellent"<sup>1</sup>. As with accommodation, exceptional service is the highlight of their experience, with staff going that extra mile.

Consumers seek out local produce and traditional specialities when eating out. In general, they find that labelling is clear and that there is good information on food allergies.

The few complaints tend to be driven by the perception of Irish food as "fried/fatty" with a scarcity of healthy options.

### WHAT THEY SEE AND DO

Cultural and Historical visits (88%) top the list of things to see and do for holidaymakers, with nine in ten French and German holidaymakers visiting such sites. Heritage and Interpretive Centres are particularly popular among French and German holidaymakers.

Almost half (45%) of overseas holidaymakers take part in an outdoor activity (such as walking or golf) while in Ireland. For those who participate in organised activities, the friendliness and expertise of activity providers as well as their attention to customer safety is appreciated.

Those interested in outdoor activities search for information on the internet (65%), from friends and relatives (49%) and in the locality where they stay (32%).

Encourage your team to maintain their high levels of service, driving recommendations for both your business and destination.

Check that the information that you provide to your customers is clear and relevant, whether it relates to directions, how to book and in the case of activities, any relevant safety information.

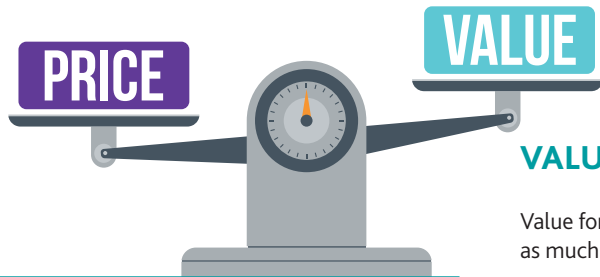
Using and promoting local produce sits well with authentic food offerings for holidaymakers. Ensure your menu design caters for those who want to make healthier choices.

Activity providers, ensure that information about your experience is easy to find and share, on the internet and within your destination, with other industry partners.

<sup>1</sup> A score of 9 or 10 out of an 11-point rating scale where 0 is very poor and 10 is excellent

Sources: Fáilte Ireland's Tourism Experience Survey at Ports 2019 and Survey of Overseas Travellers 2019  
Quotes Fáilte Ireland's Tourism Experience Survey at Ports 2018 survey

# When Holidaymakers are here – their value for money experience



## VALUE FOR MONEY<sup>1</sup>

Value for money is about the quality of the experience or service that holidaymakers get, as much as price.

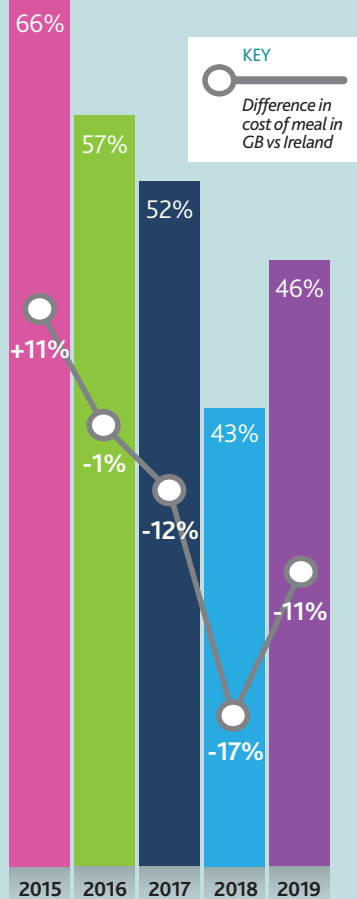
Around half (55%) overseas holidaymakers rate Ireland as good or very good value for money, a dip in the trend of recent years (2014-2018).

In 2019 we see an uplift for value for money for British holidaymakers after a number of years in decline.

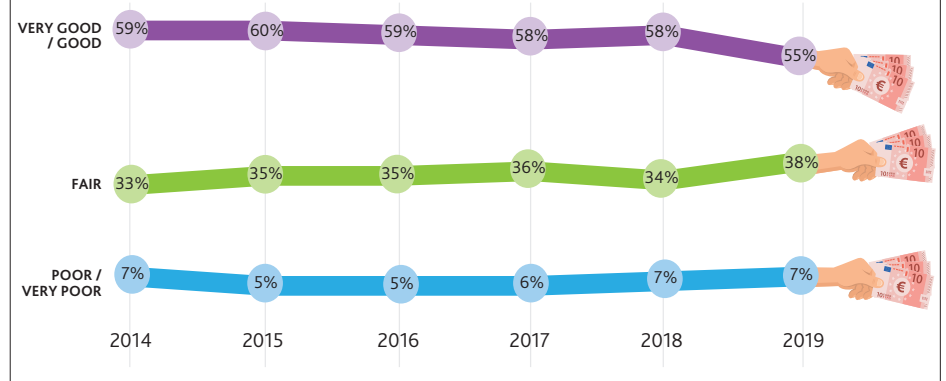
While exchange rates can, to some extent, account for the deterioration in value for money, the relative difference in cost of living between the two countries is also a factor.

The line chart shows the difference in cost of a meal (in sterling) in Great Britain and in Ireland. There is a clear correlation between the perception of value for money and actual cost from a British consumer's perspective.

### BRITAIN % RATING VALUE FOR MONEY GOOD/VERY GOOD



## VALUE FOR MONEY – OVERSEAS HOLIDAYMAKERS<sup>2</sup>



Levels of satisfaction with value for money vary across our core markets, with Americans scoring most favourably and Germans the most critically.

## VALUE FOR MONEY – OVERSEAS HOLIDAYMAKERS<sup>2</sup>

VALUE FOR MONEY - 2019				
Good / Very Good	46%	<b>61%</b>	55%	48%
Fair	43%	36%	39%	41%
Poor/ Very Poor	10%	3%	5%	<b>11%</b>

Among those giving a critical rating of value for money, the cost of eating out and drink are the most common reasons given.

## TAKE AWAY

Can you bundle any elements of your service/experience or provide added extras to make holidaymakers feel they are getting a great deal?

Can you add value through improving the quality of your service and provide a memorable experience?



1. Survey of Overseas Travellers 2019, main purpose holidaymakers  
2. Some years/markets don't add up to 100% due to rounding

Sources: Fáilte Ireland's Tourism Experience Survey at Ports 2019 and Survey of Overseas Travellers 2019



## After their Holiday

### ADVOCACY

The most powerful determining factor in holidaymakers' choice of Ireland is **recommendations** from friends or family.

It is encouraging to see **over seven in ten**<sup>1</sup> overseas holidaymakers are likely to recommend Ireland, rising from 62% in 2017.



LIKELY TO RECOMMEND HOLIDAYS IN IRELAND

TOTAL  
77%



86%



74%



74%



63%

## Likelihood to Return

One in five holidaymakers claim they are likely to visit Ireland again in the next 12 months. This is particularly high (40%) for our closest neighbours, Britain, with 14% claiming they will return within the same calendar year.

A further one in three holidaymakers say they intend to come back in the next few years.

In fact, **over 30% of holidaymakers**<sup>1</sup> have visited Ireland more than once and this is highest among the British and German markets.

Those from long haul markets are least likely to return in the short term, not surprising, given the financial and time commitment required for long distance leisure travel.



### LIKELIHOOD TO RETURN

Definitely - I'll be back later this year	5%
Definitely - I'll be back next year	13%
Definitely - I'll be back in the next few years	31%
I hope so - at some time in the future	42%
Probably / Definitely Not	6%
Not Sure	4%

### TAKE AWAY

Short haul markets (Britain and Mainland Europe) are best positioned for a return visit. Can we exceed expectations, cross promote other regions in Ireland and give them a compelling reason to come back?

Grow your contact database and maintain (appropriate) contact with your holidaymakers. Promote and share images of what they could experience when they return.

Nothing is more important and effective in the promotion of Ireland than the endorsement and recommendation of previous holidaymakers. Make sure the experience you give them is world-class and worth re-telling in person, through online reviews or social media.

1. Survey of Overseas Travellers 2019, main purpose holidaymakers (a score of 9 or 10 out of an 11-point rating scale where 0 is definitely would not recommend and 10 is definitely would recommend.)