



Fáilte Ireland

British Perspectives 2010

August 2010

Prepared for:

Fáilte Ireland

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Project Objectives

1. To explore attitudes to holidaying in Ireland with British consumers, and to examine images, perceptions and blockages to holidaying in Ireland.
2. To understand the dynamics underpinning the decline in the sub-segments of the GB market to Ireland from a destination, and consumer behaviour perspective.
3. To deliver strong research-based insights for input into national tourism policy.

Current Climate

Job security concerns -
-full time/full contract
less common

Euro exchange rate
limits travel options



Pension undermined
- part-time work to
supplement?

'Big purchase' plans on hold

Many feeling less secure about finances.

Holiday Trends

Non Euro zone destinations
more often considered
(Egypt/Tunisia/ Morocco etc.)

Discount airline pricing can
trigger destination choice



Multiple short breaks
adopted by all consumers:
- Foreign city breaks
- GB long weekends

Independent travellers:
- Book/research online
- Not package
- But independent
research takes time..

Some have reduced holiday
length/scope (one rather
than two weeks)

No clear pattern of overseas 'top destinations' but shortbreaks & 'staycationing' on increase.

Ireland Advocates

- Those with experience of Ireland clearly very well disposed - strong emotional attachment.
- However, advocacy typically revolves around 'standard' criteria of: pub/craic', food and scenery.
- Activity reviews emerge eventually but only after considerable prompting: fishing, walking, heritage etc.
- GB staycation advocates appear more likely to relate practical and visceral experiences capable of persuading others.
- In addition, Irish advocates bemoan poor value for money in Ireland... in direct contrast to GB staycation advocates.

Insight:

More frequent, shorter holidays close to home provide a potential template for leveraging Irish holidays.

Review of Lifestage Groups

- Preference for **impulsive** independent travel.
- Last minute booking.
- Sense of **freedom** critical.

- Parents 'learning' to adjust to changing needs of children
 - ❖ Entertainment on holiday
 - ❖ Quality time together with kids
 - ❖ Quality time for parents

- Teens pushing away from family.
- Embarrassed to be with parents.
- Some activities can bring family together
 - ❖ Water sports
 - ❖ Water parks
 - ❖ Camel ride

- Comfort and cleanliness prioritised.
- Many want to feel pampered - 'looked after' for a change.
- Short breaks in GB and city breaks outside country more frequent.
- NB. Many limit travel period & distance to stay close to elderly relatives.

Insight:

Matching lifestage requirements can maximise the appeal of an Irish holiday and it is important to avoid the sense Ireland offers just one type of holiday.

Holiday Priorities

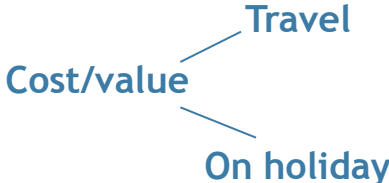
Travel time/
ease of access

Accommodation
quality

Entertain the
kids

Staff/service

Bit of
life/nightlife



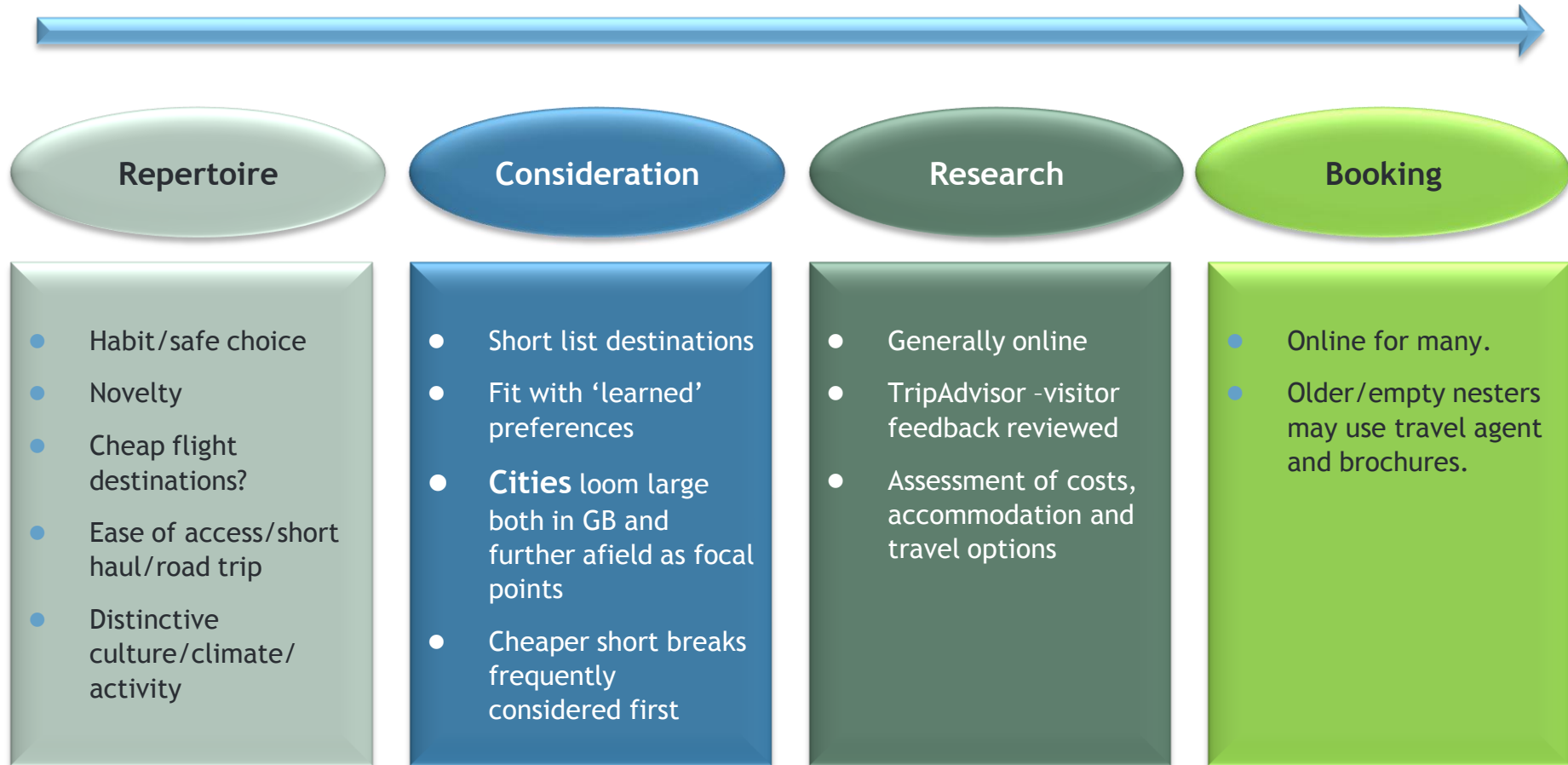
Complete
relaxation

Distinctive
experience

Insight:

Irish holidays should deliver on all these priorities but most effort should focus on people, quality and distinctive experiences.

Holiday Planning: Key Stages



Holiday Planning: Ireland

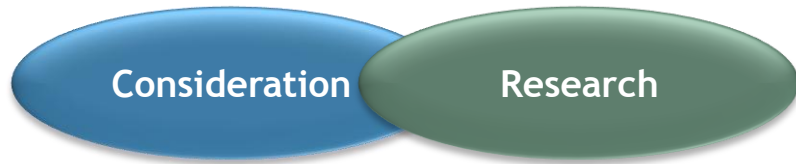
Repertoire

- GB 'Staycation' key competitor
- Short trip
 - ❖ Same climate as home
 - ❖ Same language
- Local differences often enough to build short break around

- Often Ireland is linked with stereotype inhibitors which undermine a repertoire role for Ireland
 - Expensive when there
 - Stag party Dublin

A holiday in Ireland needs to be conceived as **easy to imagine** with **distinctive** features to compete with Staycation breaks

Holiday Planning: Ireland



- City breaks typify the extended short list for many GB consumers.
- Conceived as a short trip with lots to do: Tourist sites, eating out, entertainment options - all these fill consumers minds as they consider and research alternatives

- The 'empty' landscape of the rest of Ireland can suggest little to do.
- Many consider up to 5 days a 'short break' and finding lots to do is important

GB consumers rarely know about the scope and range of the Irish holiday product. Distinctive, **real** experiences could convey a multifaceted holiday.

Holiday Planning: Ireland

Booking

- Value can stimulate purchase
 - ❖ Discount flights
 - ❖ Specialness
- Clinching a decision built up through consideration & research
- NB sense of value can be linked to quality or fit with needs.

- Cost of living & euro pricing create significant stumbling block at point of booking a holiday to Ireland.
- While all accept they are more relaxed about spending on holiday many have been burnt by costly activities in the past.

Great value activities, superior quality and tailoring to personal/family needs can help to balance negative associations with cost of living.

Insight:

Ireland should be pitched as a multifaceted destination with distinctive experiences more accessible than a staycation.

Building a Strategy for Irish Holidays

People

- Interaction with locals.
- Welcoming
- Quirky

Quality

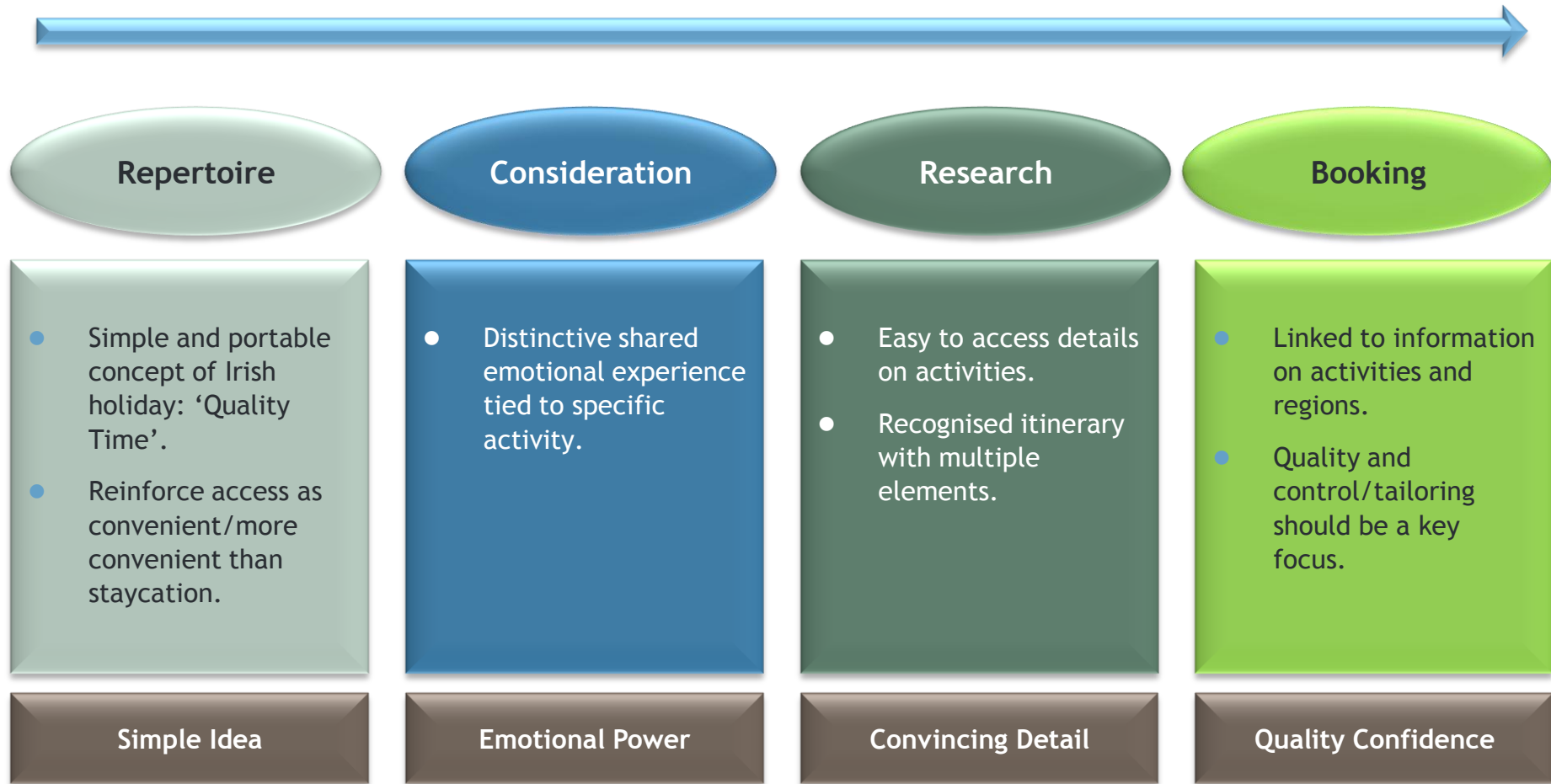
- Reassurance of value in:
 - Accommodation/ food
 - Tailoring to needs/ preferences

Distinctive Experiences

- Unique elements of holiday products (not just attraction 'honey pots').
- Potential to share memorable experiences with companions.

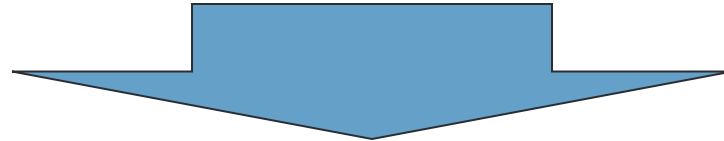
'Quality Time'

Building a Strategy for Irish Holidays



Building a Strategy for Irish Holidays

'Quality Time'



Shared
Emotional
Experience
Examples

'Rekindle the
Romance'

'Real
Welcome'

'Bonding
with your
teens'

'Heal your
Soul'

Actual
Activity
Examples

Stay in a
Lighthouse
in Wexford

Surprising
street
markets

Surf
school in
Clare

Sunrise on
Carrantouhill



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