



Destination Visitors Research

*A Programme of
Research on the Themed
Hubs Initiative*

October 2010

Prepared for:

Fáilte Ireland
Get Out There!
Tourism Adventure &
Activity Forum

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HOLIDAY SURVEY 2010
DISCOVER IRELAND.IE



Research Background & Objectives



Research Background & Objectives

- The Destination Visitors Research comprises a programme of surveys which evaluated visitors experience of a set of tourist areas during the Summer of 2010.
- The development of Themed Holiday Hubs is a key recent initiative for Fáilte Ireland.
- The aim of the Holiday Hubs is for local businesses and communities to work together to grow tourism business in the area.
- The holiday hubs are:
 - ❖ Being developed in 32 chosen locations
 - ❖ Built around 6 different themes: family, adventure, walking, angling, culture and heritage
 - ❖ Already include the participation of approximately 1,000 businesses.

Research Approach

- Research comprised of three key elements:

Visitor Feedback Online Survey

- Sample 519

Visitor Feedback Qualitative Research

- 10 in-depth interviews

Mystery Shopping Research

- Sample of 100 mystery shopping visits.

Research Approach

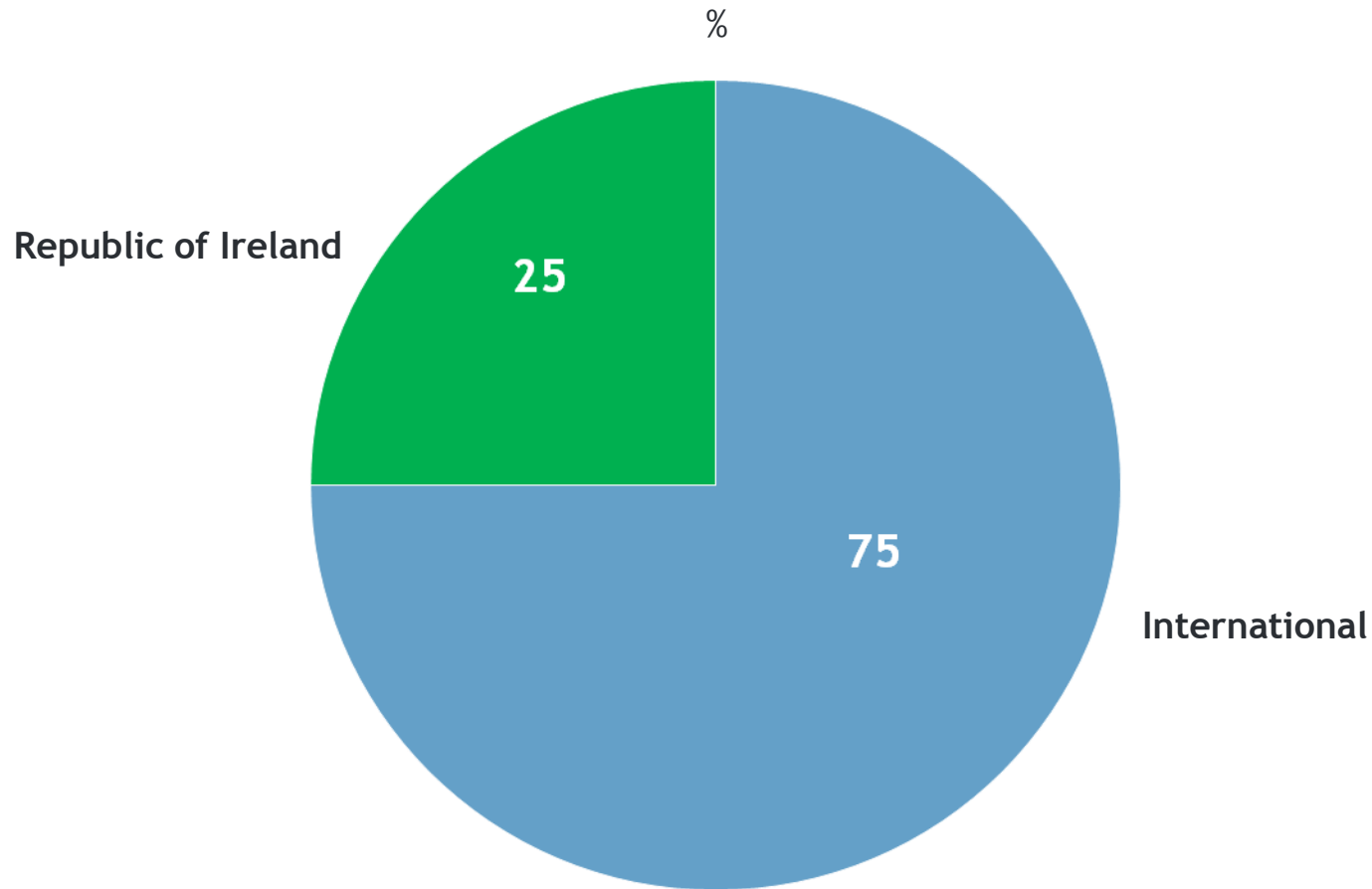
- Fieldwork for all elements of the research took place between August and October 2010.
- The visitor feedback online survey was valuably promoted by participations businesses through the distribution of promotional postcards and the retrieval of visitor email contact details.
- Interviewees for the qualitative research were recruited via the online survey and the qualitative interviews were conducted over the phone.
- Research focussed on the following key destinations:
 - ❖ Connemara & Mayo
 - ❖ Clare & Limerick
 - ❖ Shannon Region
 - ❖ The South East
 - ❖ Cork City
 - ❖ West Cork
 - ❖ The Dingle Peninsula
 - ❖ The Ring of Kerry
 - ❖ Dublin & Dublin's Doorstep
 - ❖ Donegal/Sligo

Sample Profile



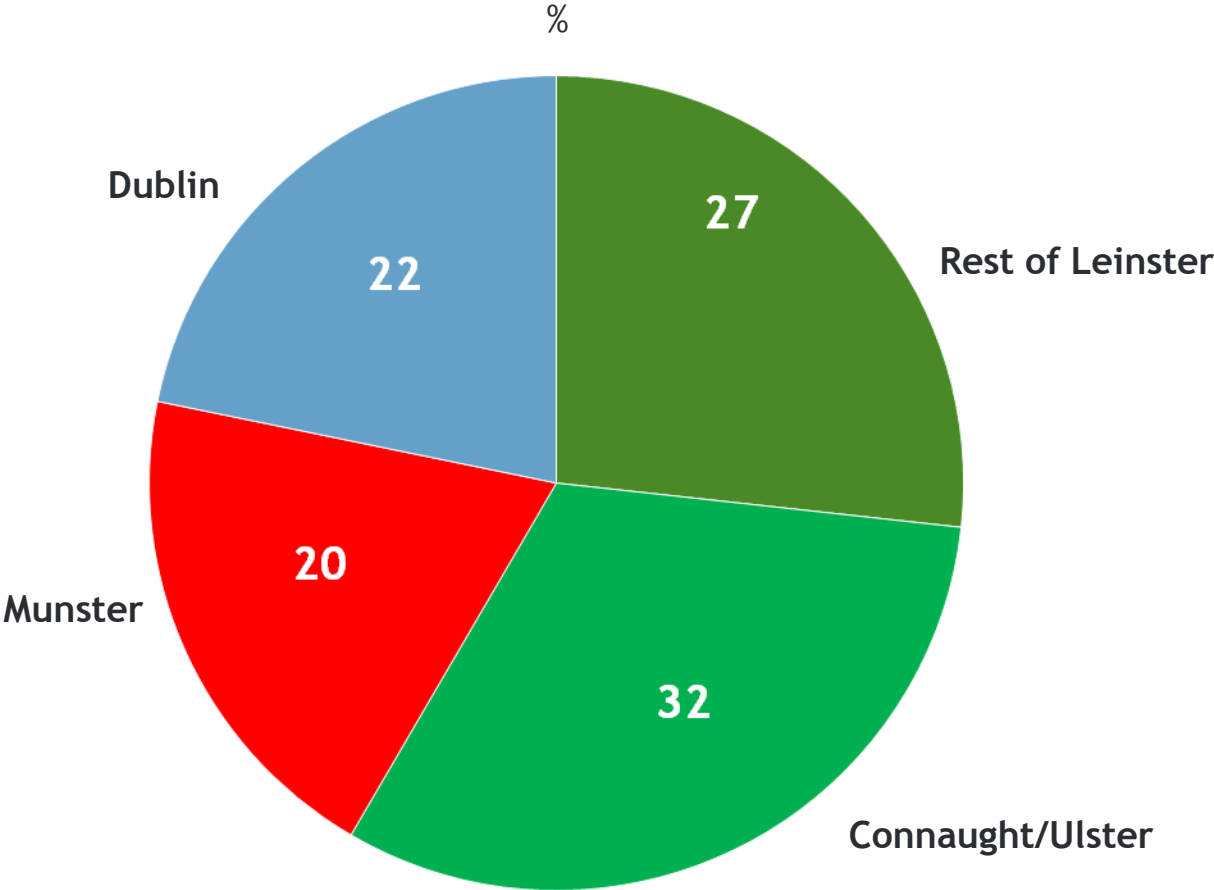
Country of Residence: Summary

Base: All respondents 519



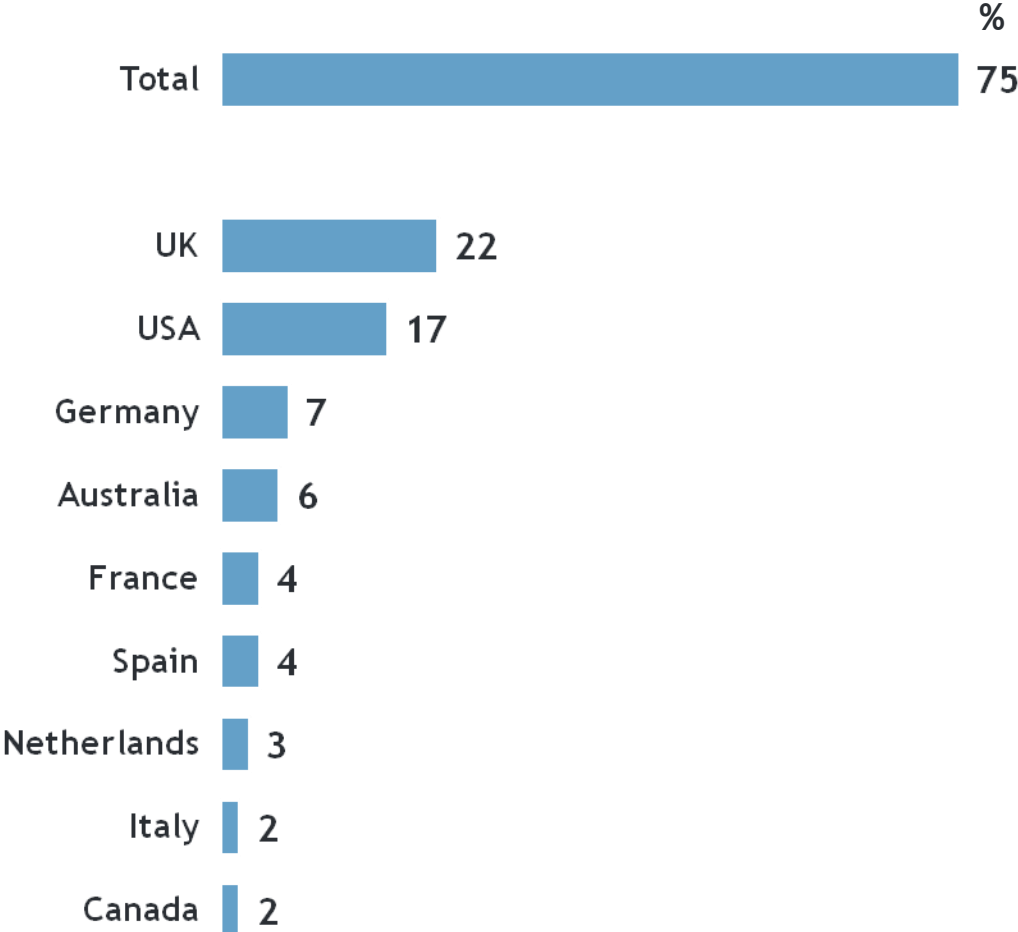
ROI Visitors: Region

Base: ROI Visitors 130



International Visitors

Base: International visitors -389

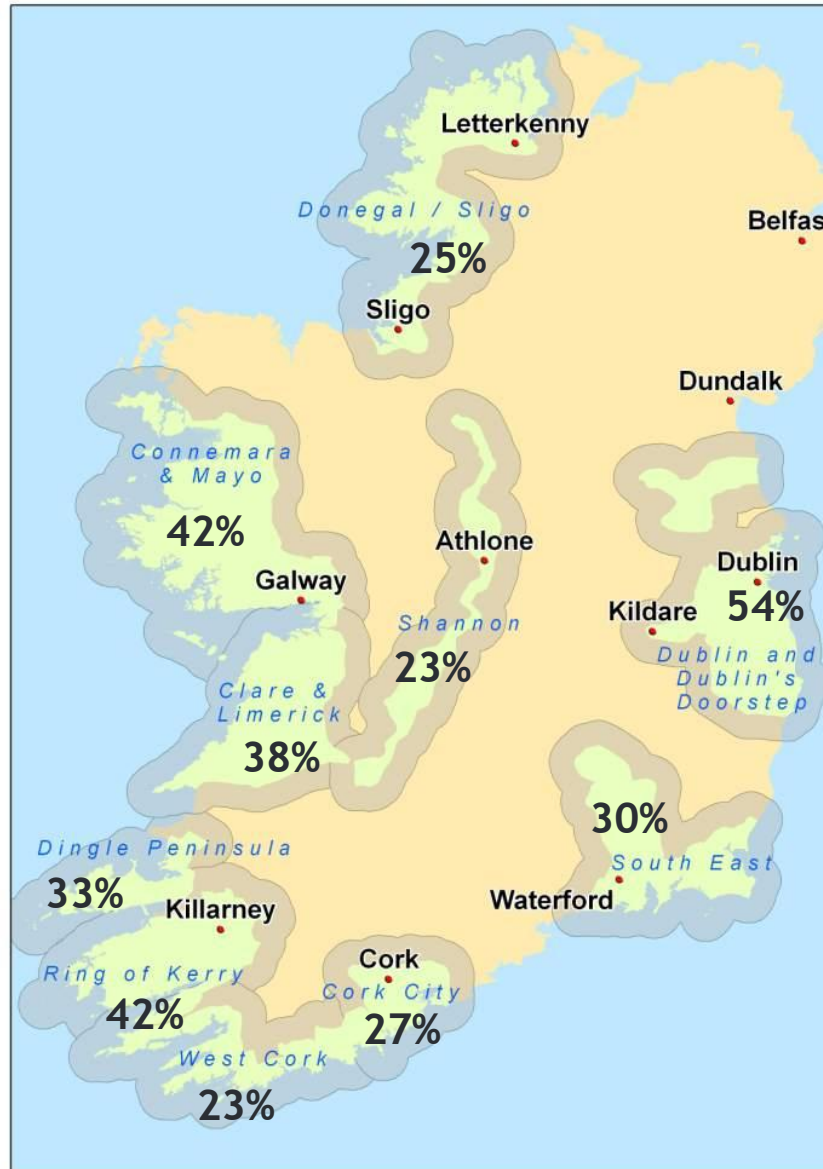


*(28 countries mentioned in total)
(All others 1% or less)*

Destinations Visited



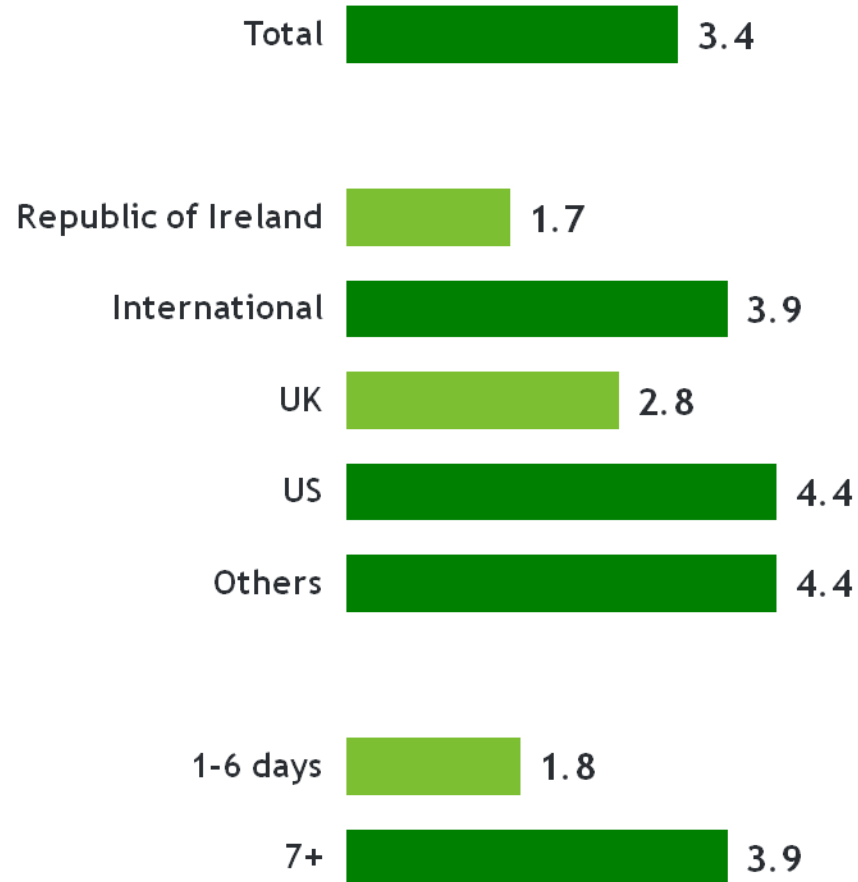
Destinations Visited (At All)



Average No. Destination Visited 3.4

Average No. of Destinations Visited

Base: All respondents 519

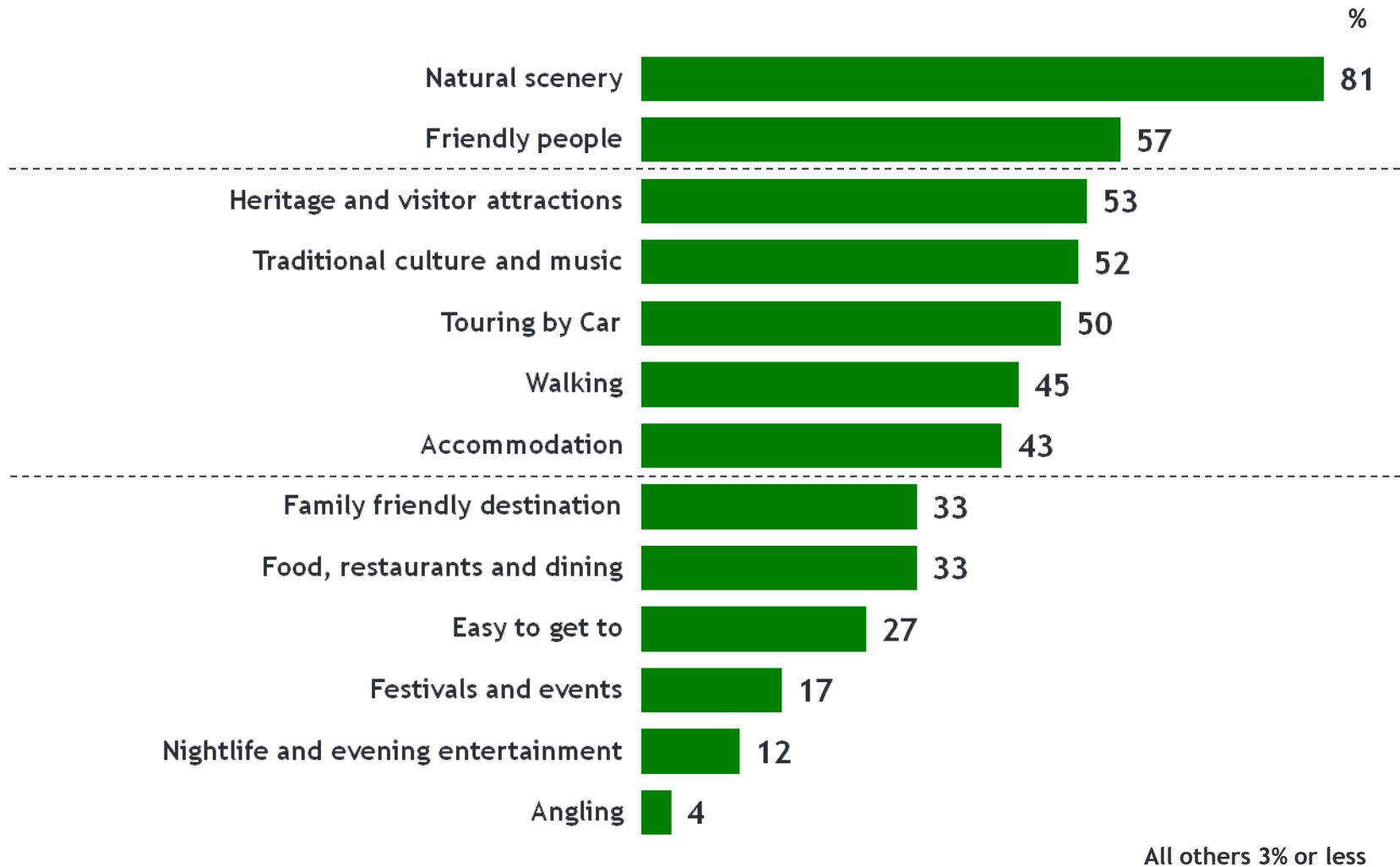


Factors Influencing Choice of Destination



Key Influencing Factors

Base: All respondents 519



Key Influencing Factors

Base: All respondents 519

	Total	ROI	INTERNATIONAL
	%	%	%
Natural scenery (beaches, coast, lakes, rivers, parks etc)	81	78	82
Friendly people	57	43	61
Heritage and visitor attractions	53	48	55
Traditional culture and music	52	33	58
Touring by Car	50	48	51
Walking	45	45	45
Accommodation	43	58	37
Family friendly destination	33	39	31
Food, restaurants and dining	33	45	29
Easy to get to	27	42	21
Festivals and events	17	20	16
Nightlife and evening entertainment	12	12	12

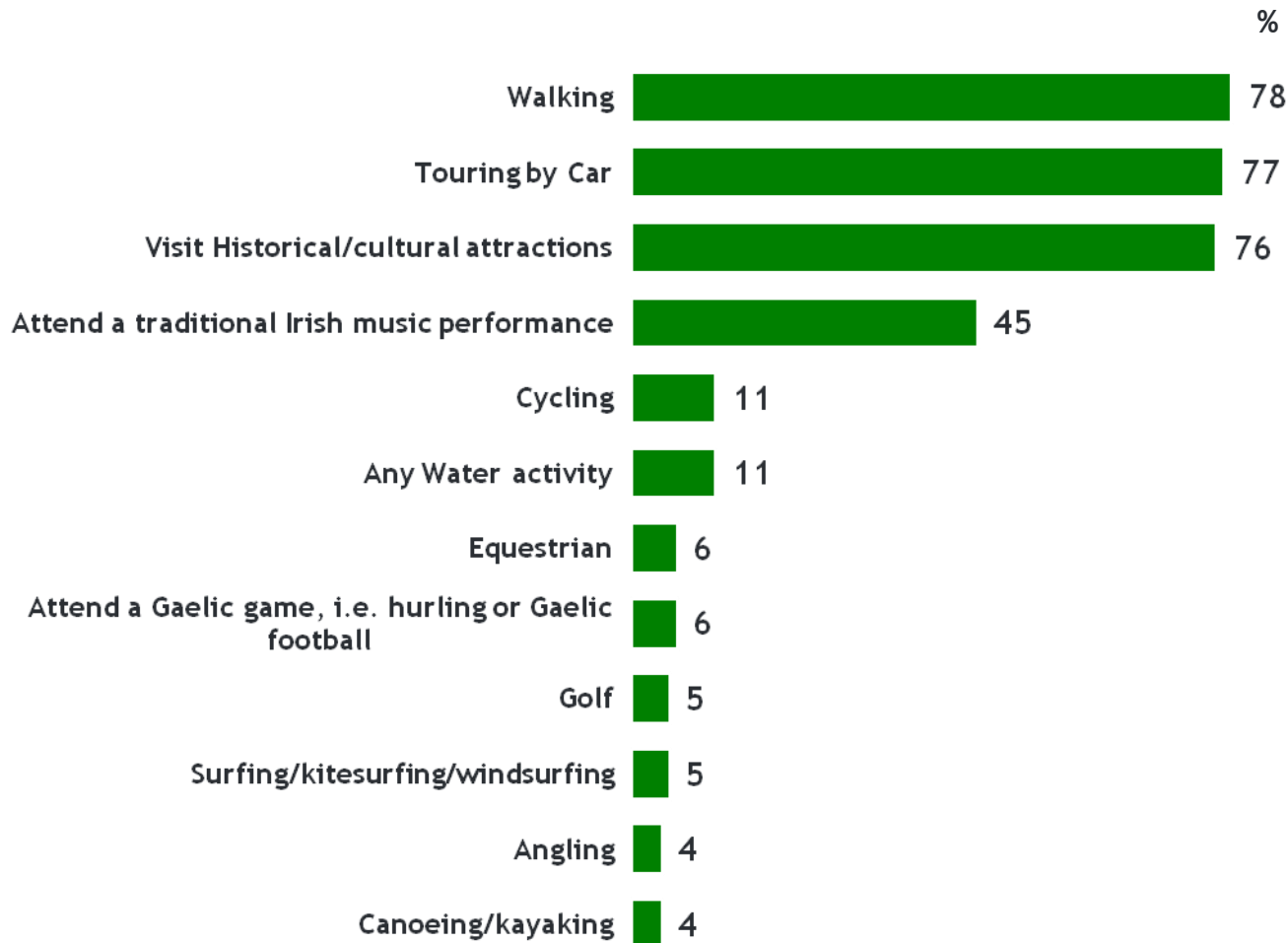
All other mentions 4% or less

Activities



Activities Participated In

Base: All respondents - 519



Activities Participated In

Base: All respondents - 519

	TOTAL	COUNTRY	
		ROI	INTERNATIONAL
	%	%	%
Walking	78	76	79
Touring by Car	77	78	77
Visit Historical/cultural attractions	76	71	78
Attend a traditional Irish music performance	45	31	49
Cycling	11	16	9
Any Water activity	11	16	9
Equestrian	6	7	6
Attend a Gaelic game i.e. hurling or Gaelic football	6	4	7
Golf	5	5	4
Surfing/kitesurfing/windsurfing	5	8	3
Angling	4	5	3
Canoeing/Kayaking	4	8	2

Activity Pen Profiles

Water Sports



- Equally popular among women and men.
- Young - strongest appeal among under 34s.
- Participation particularly strong among couples and families.
- Interestingly, most popular age for children is between 5 and 11 years.
- Mostly from ROI....but also mostly on long breaks.
- Key 'land' activities are: walking, touring by car and visiting historical/cultural attractions.

Activity Pen Profiles

Walking (Experienced)

- More likely to be middle age group (35-54 years).
- Again equally popular among men and women.
- Longer trips.
- High incidence of repeat visitors.
- Key high engagement with other activities both 'land' and 'water'.



Activity Pen Profiles

Cycling



- Particularly popular among women.
- Younger age profile - not as young as water sports but close.
- Popular among young families - children aged between 5 and 11.
- Likely to be repeat visitors.
- Most likely to be domestic visitors and on long breaks.
- Strong participation in walking and water sports.

Activity Pen Profiles

Equestrian



- Female - but travelling with family.
- Between 35 and 54 years.
- With children - typically younger age groups.
- International
- High participation in walking and cycling.



Activity Pen Profiles

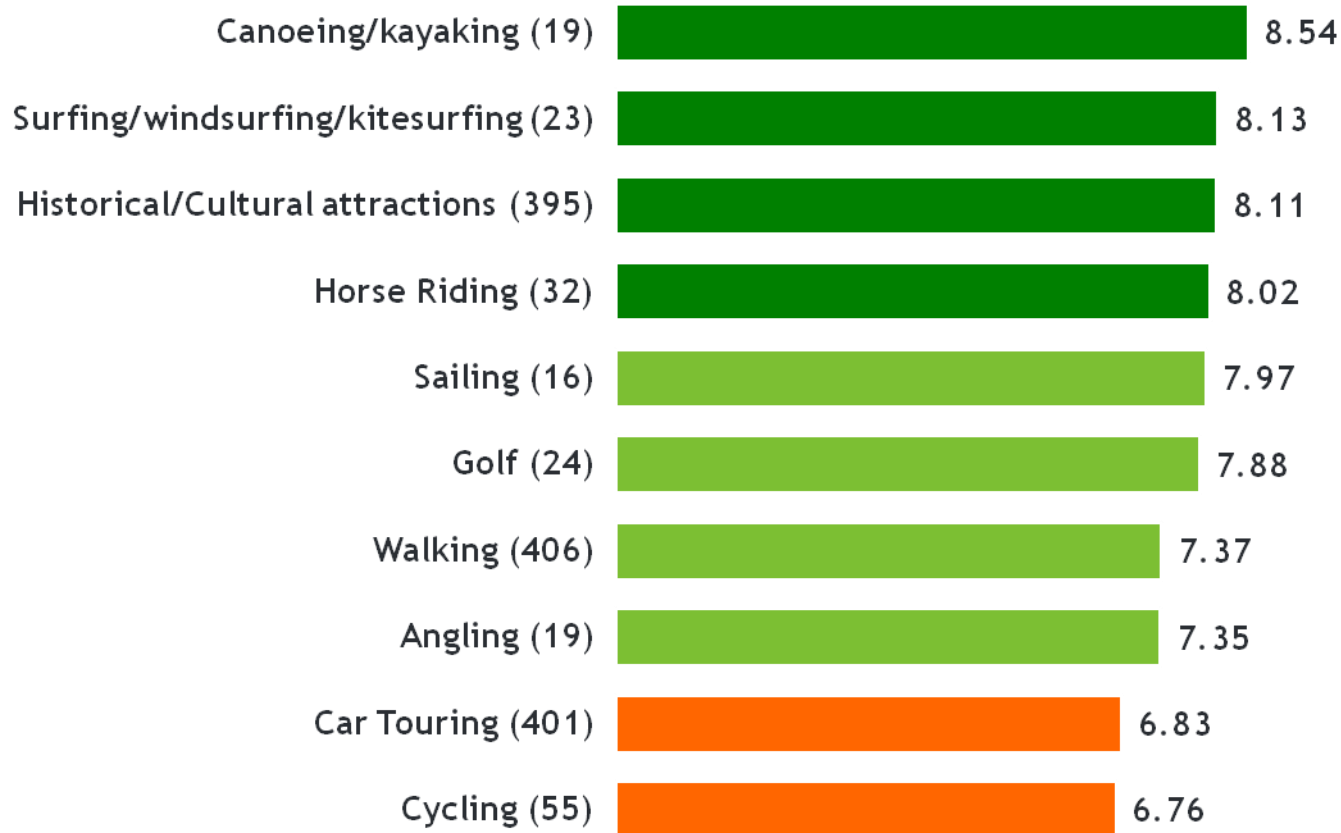
Golf

- More male - but only slightly.
- Middle age group (35-54 years).
- More likely to travel in adult groups.
- Equally prominent among domestic and international visitors.
- Short trips.
- Strong participation in cycling and equestrian (wife brings children horse riding while husband plays golf (?))



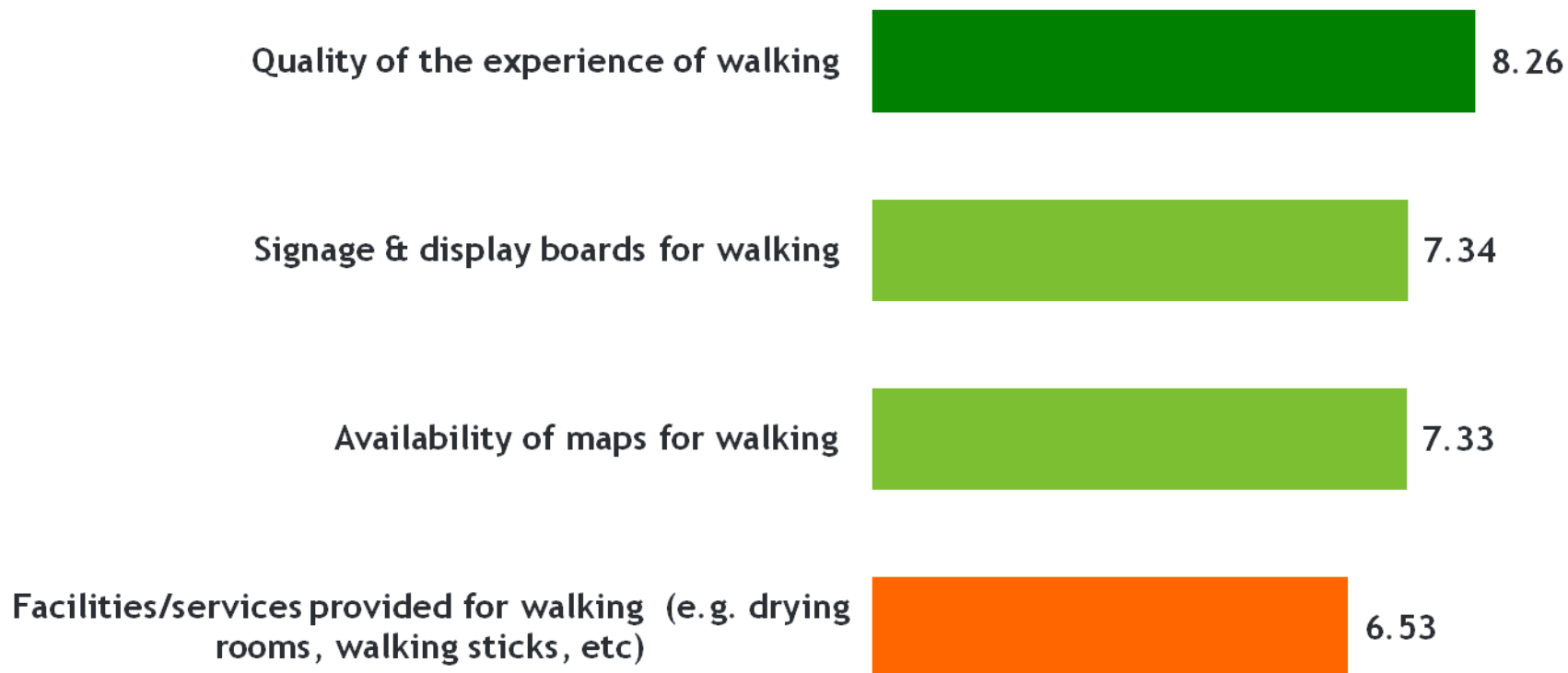
Activities: Summary Ratings

(Base sizes in brackets)



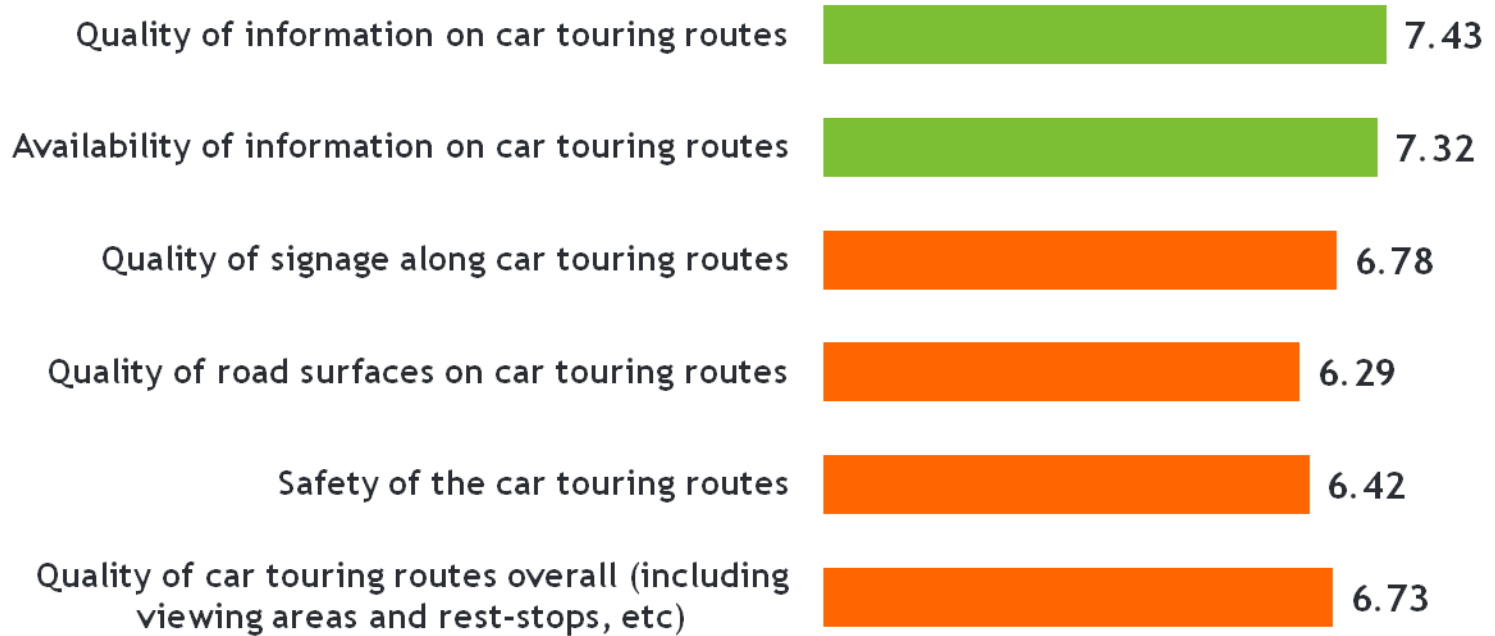
Walking

Base: All participate in activity - 406



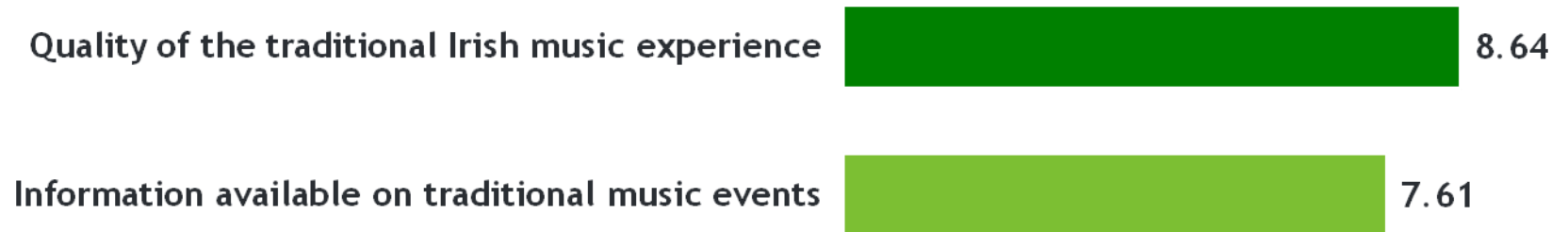
Touring by Car

Base: All touring by car 401



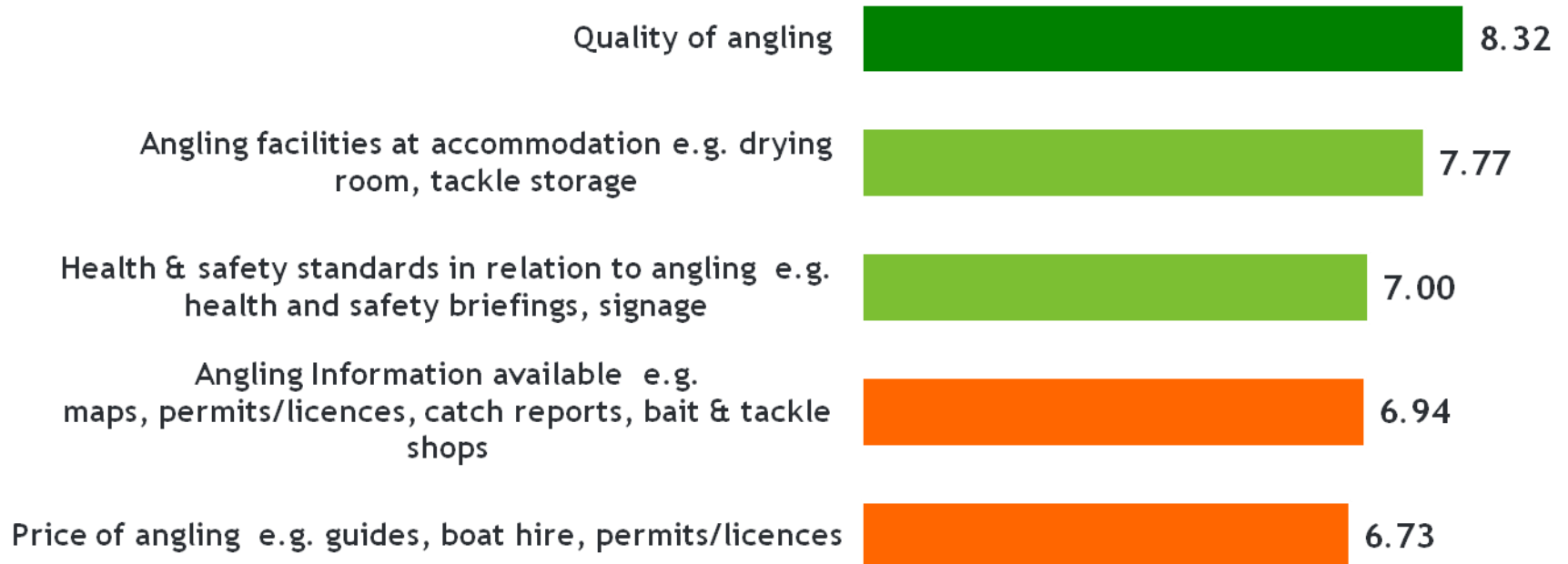
Traditional Irish Music

Base: All participate in activity - 231



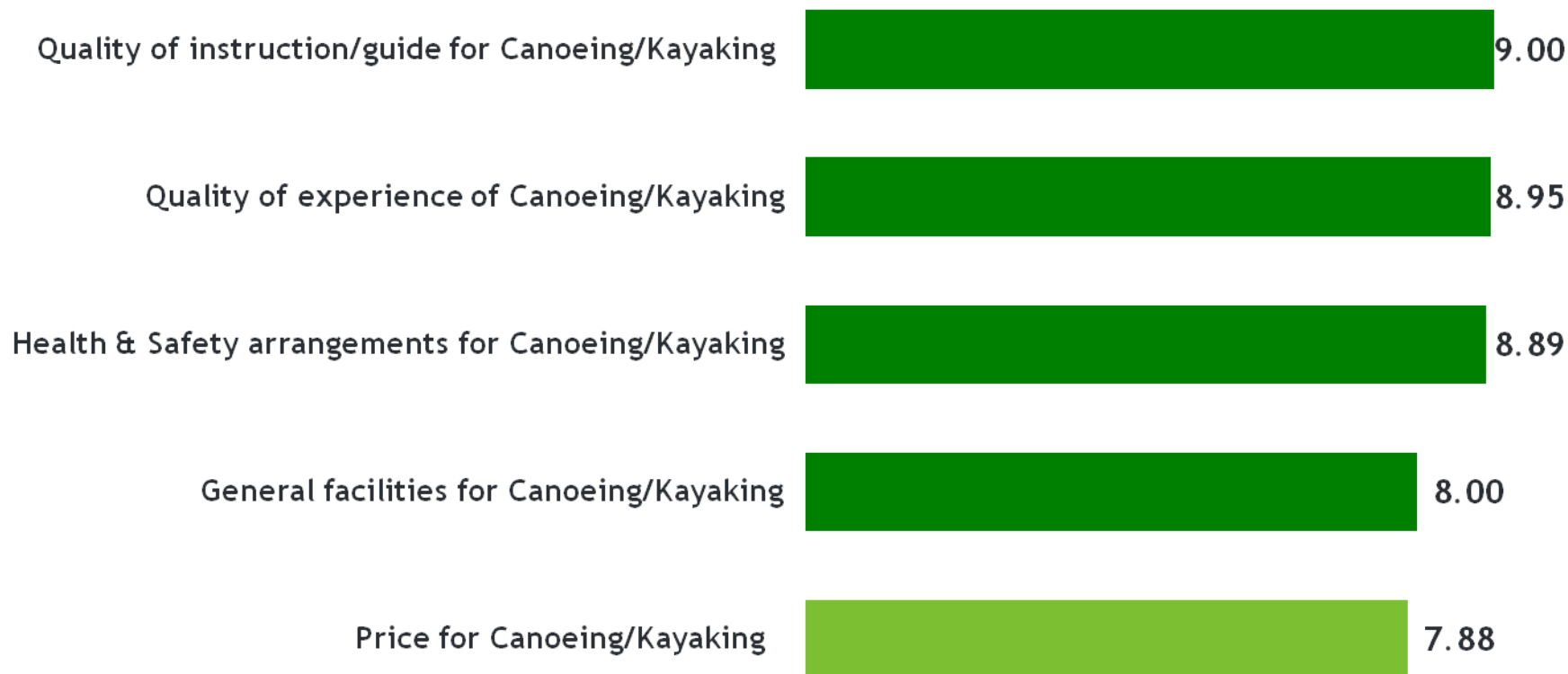
Angling

Base: All participate in activity - 19



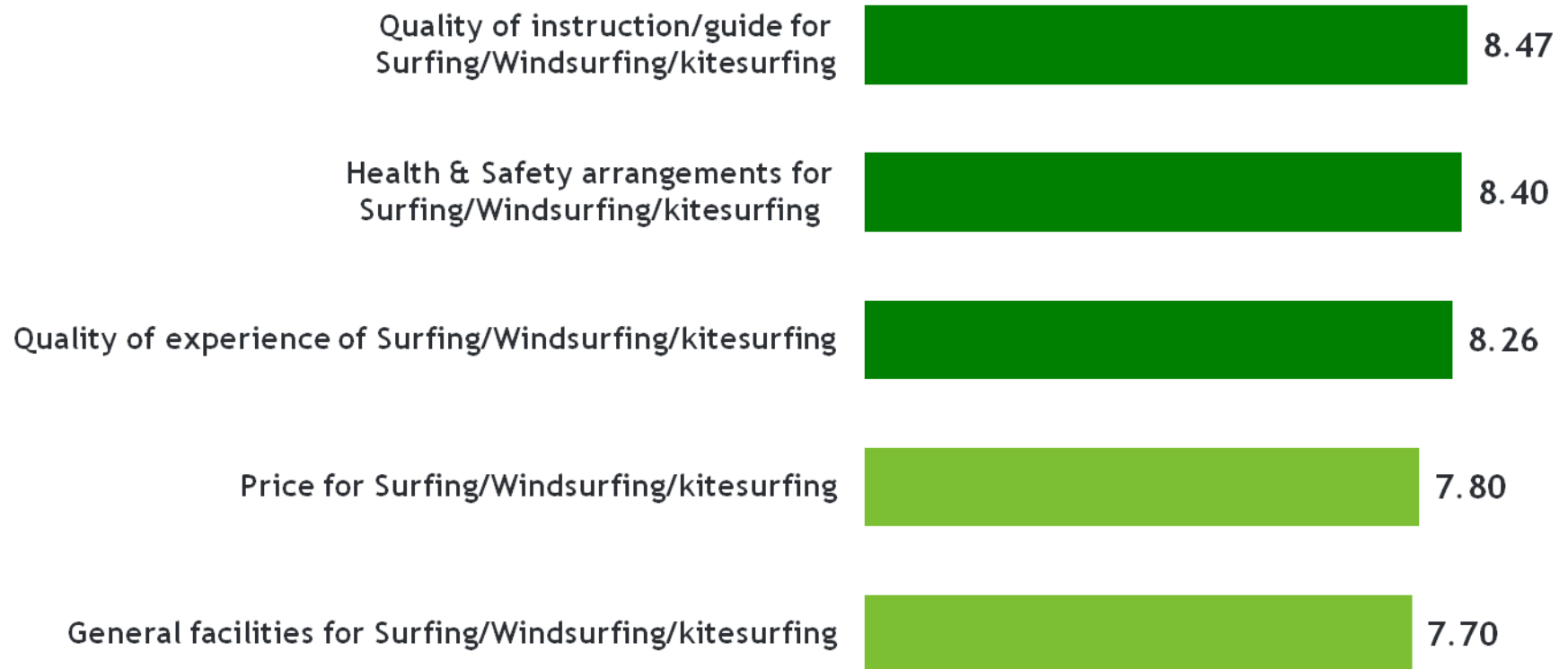
Canoeing / Kayaking

Base: All participate in activity - 19



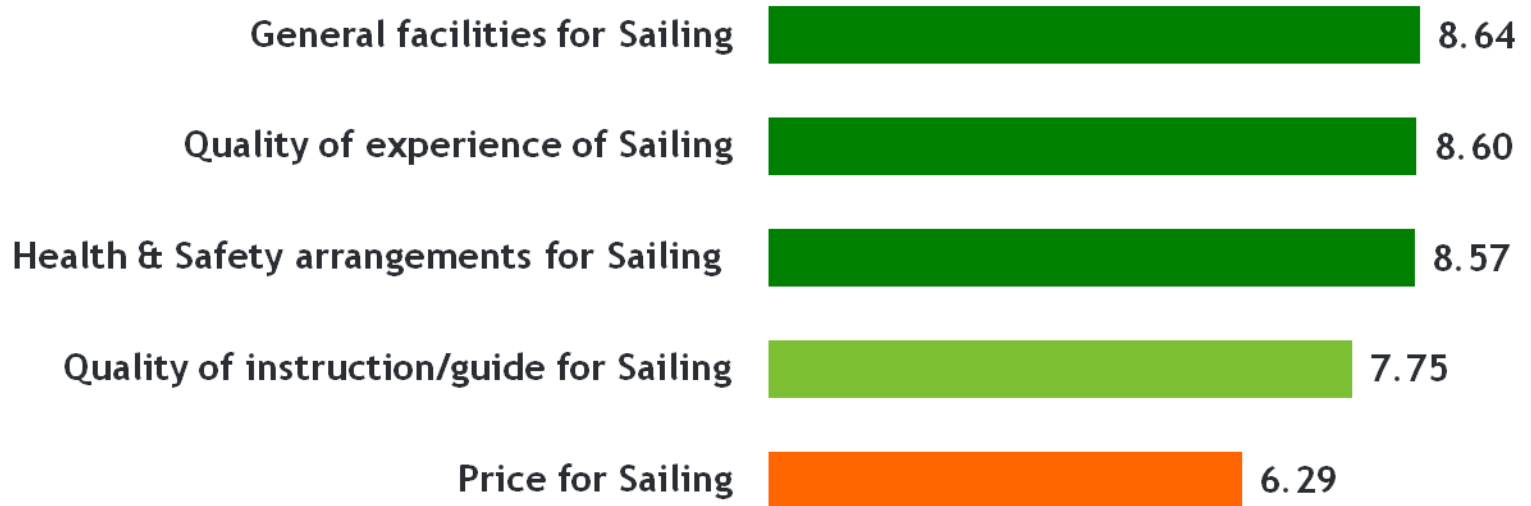
Surfing/Windsurfing/Kitesurfing

Base: All participate in activity - 23



Sailing

Base: All participate in activity - 16



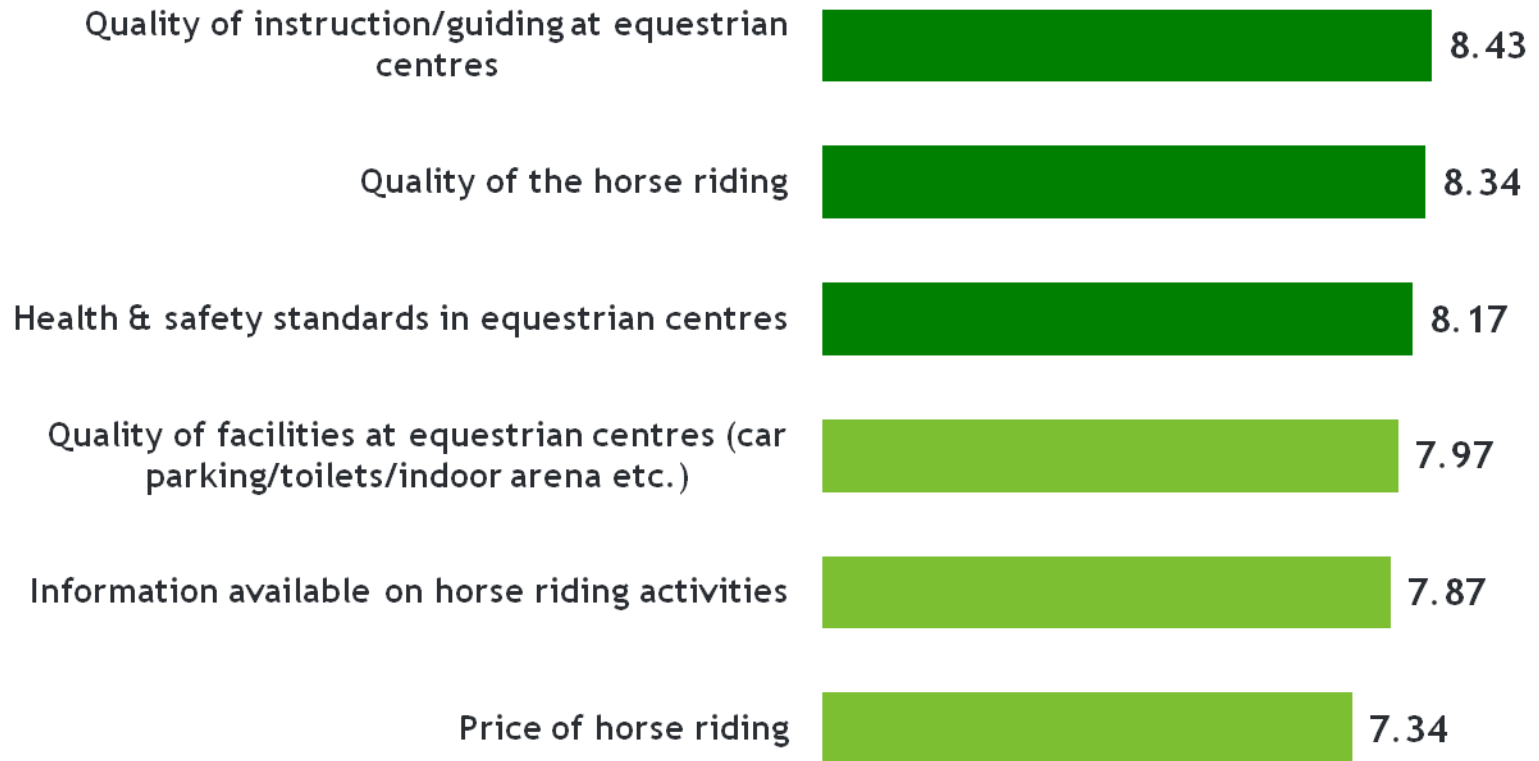
Gaelic Games

Base: All participate in activity - 33



Horse Riding

Base: All participate in activity - 32



Golf

Base: All participate in activity - 24



Cycling

Base: All participate in activity - 55



Activities: Cross Participation

- The vast majority of visitors participate in more than one activity during their visit.
- Visitors typically include the following within their portfolio of activities:

Walking

Visiting historical/cultural attractions

Touring by car

- Also, generally important in the portfolio of activities is:

Attending a traditional Irish music performance

- Other connections across activities are present:

Surfing...

and

Canoeing

Sailing...

and

Cycling

Activities: Qualitative Review

Walking

- 3 in 4 of our sample participated in walking activities and vast majority appear to go beyond 'casual' walking.
- The suggestions are that walking experienced in Ireland can be truly exceptional with improvements in routes and facilities recognised by experienced walkers.
- But there are issues....

“When you get into the mountains it really is fantastic. The problem is getting access to the mountains”.

- Access and guidance can cause problems:
 - ❖ Irrate farmers
 - ❖ Weak signage
 - ❖ Lack of visually strong maps
 - ❖ Poor local knowledge and advice

“Most staff and locals only know about little strolls, not proper routes”.

Activities: Qualitative Review

Walking

- The serious walker can feel particularly unsupported:
- Accommodation rarely formerly recognises that *“we’ve been outdoors all day”*.
- Drying facilities are *“up to the goodwill of the owner”*.
- Comparisons with the UK highlight issues in Ireland.

“Walking is better organised here now but the level of information provided in the UK is still much better - both on the routes themselves and generally”.

- However, reviews of new hostels are very encouraging and are seen as designed for outdoors activists:
 - ❖ Stands for boots
 - ❖ Places and shelter for bikes
 - ❖ Drying rooms

“You’re not sleeping in a room with steaming clothes”.

Activities: Qualitative Review

Other Activities

- A striking number of Irish families are participating in water based activities. There is a broad recognition that the water based offering has improved ‘dramatically’ in recent years, especially in relation to facilities and quality of instruction.

“Everything has improved, the wet suits you can hire, the boards, the centres”.

“Our instructor was great. Everything he said was clear and he knew everything”.

- ❖ Parents especially reassured by health and safety arrangements.

“The safety arrangements were fantastic. They were managing a group of kids but it was really well organised”.

- The Health & Safety conditions at Equestrian Centres are also praised.
- Cycling however draws unfortunate criticisms in relation to safety:

“There are more cycle paths and they are of good quality, but when you move onto the main roads it can be awful”.

- Some new cycle routes are considered excellent but facilities can also draw criticism:

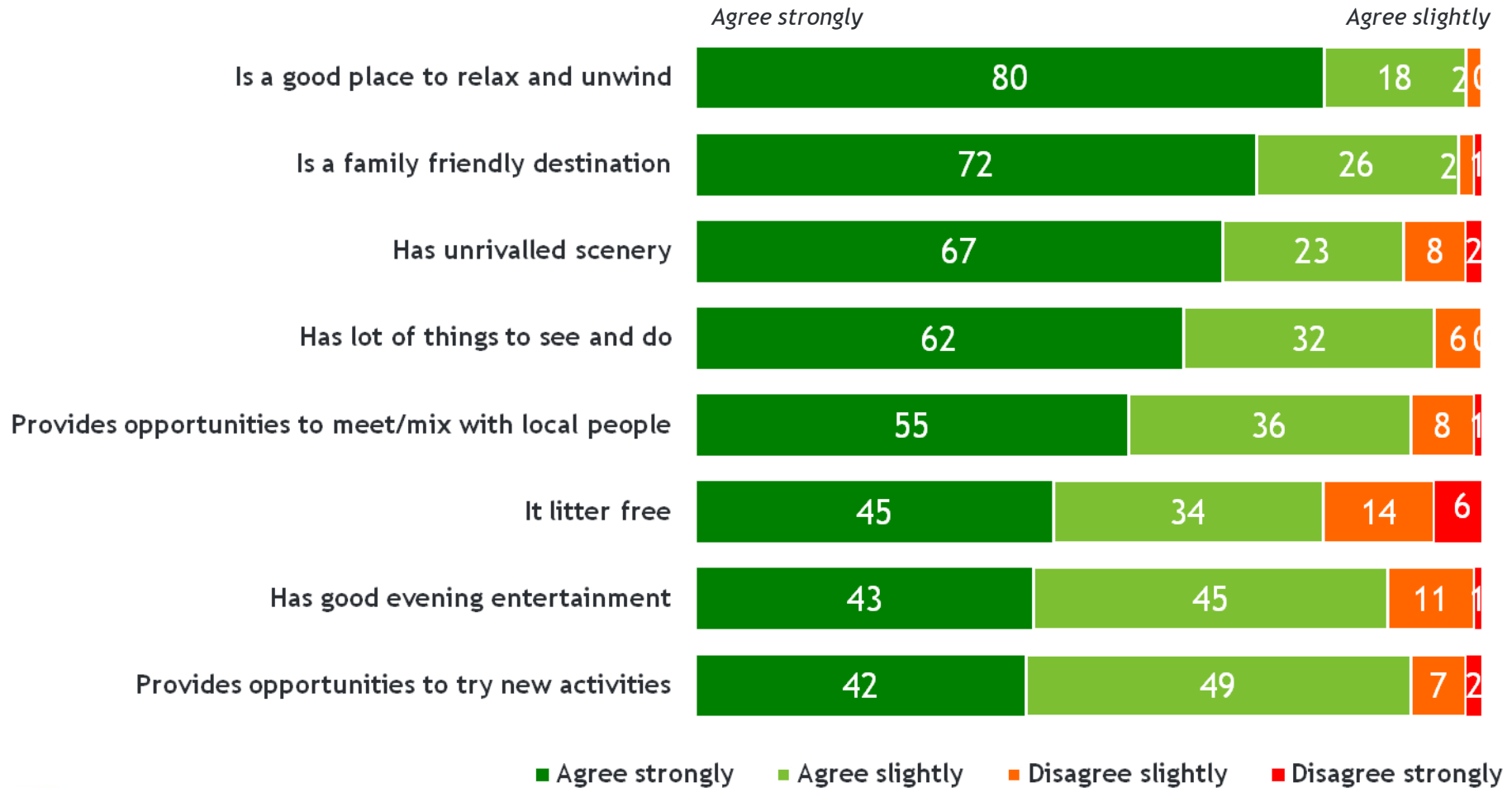
“The bikes we hired weren’t up to a long cycle”.

Holiday Experience



Holiday Experience

Base: All respondents - 519

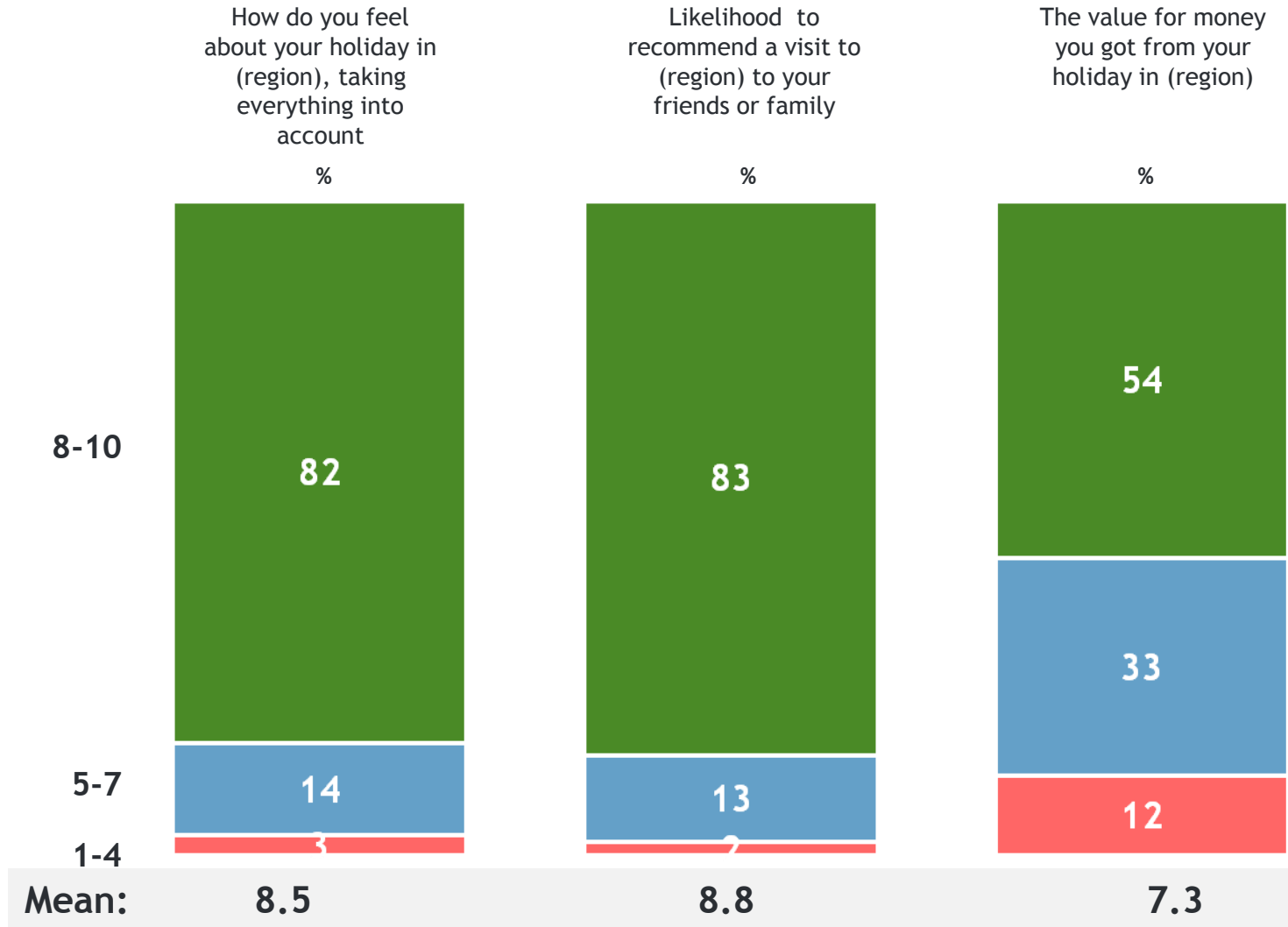


Headline Measures



Evaluation of Overall Experience

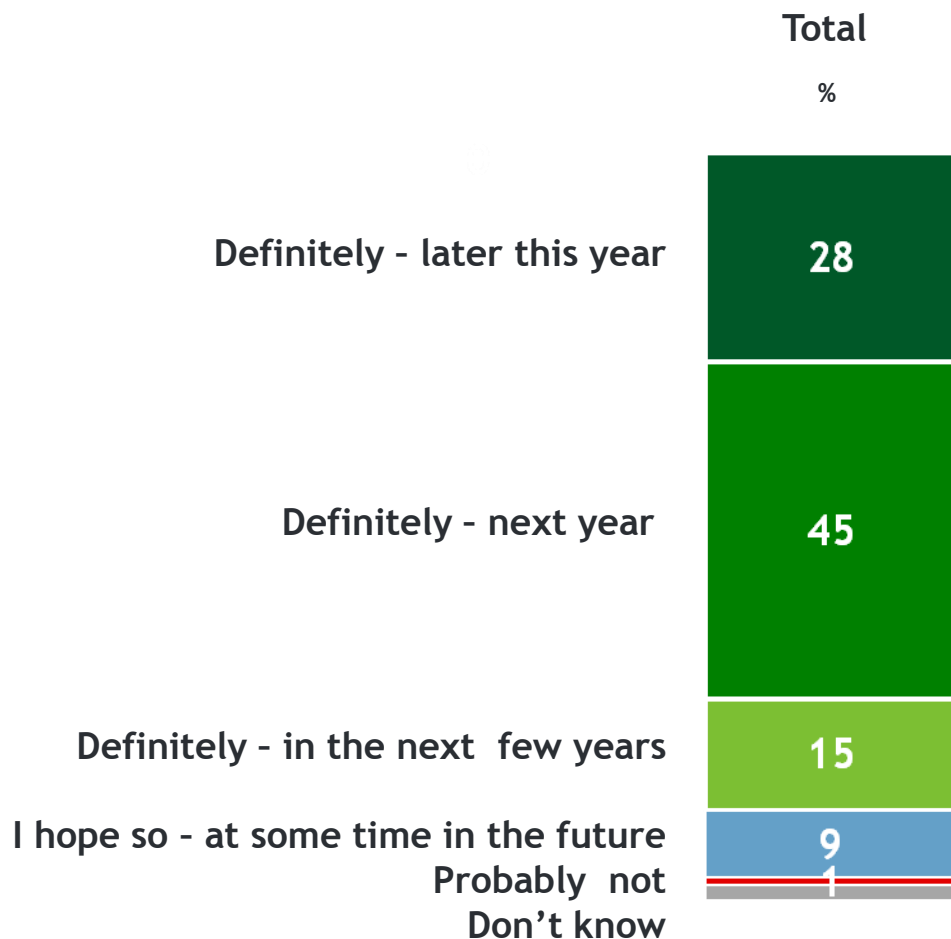
Base: All respondents - 519



We would now like you to evaluate your overall experience in (region). On a scale of 1 to 10, how satisfied or otherwise are you with each of the following aspects of your holiday in (region). The more satisfied you are, the higher the score you should give. The more dissatisfied you are, the lower the score you should give. And how likely or unlikely are you to recommend a visit to (region) to your friends or family? Again using a 10 point scale, where 10 is extremely likely and 1 is extremely unlikely.

Likelihood of Taking a Holiday Again in Ireland in Future

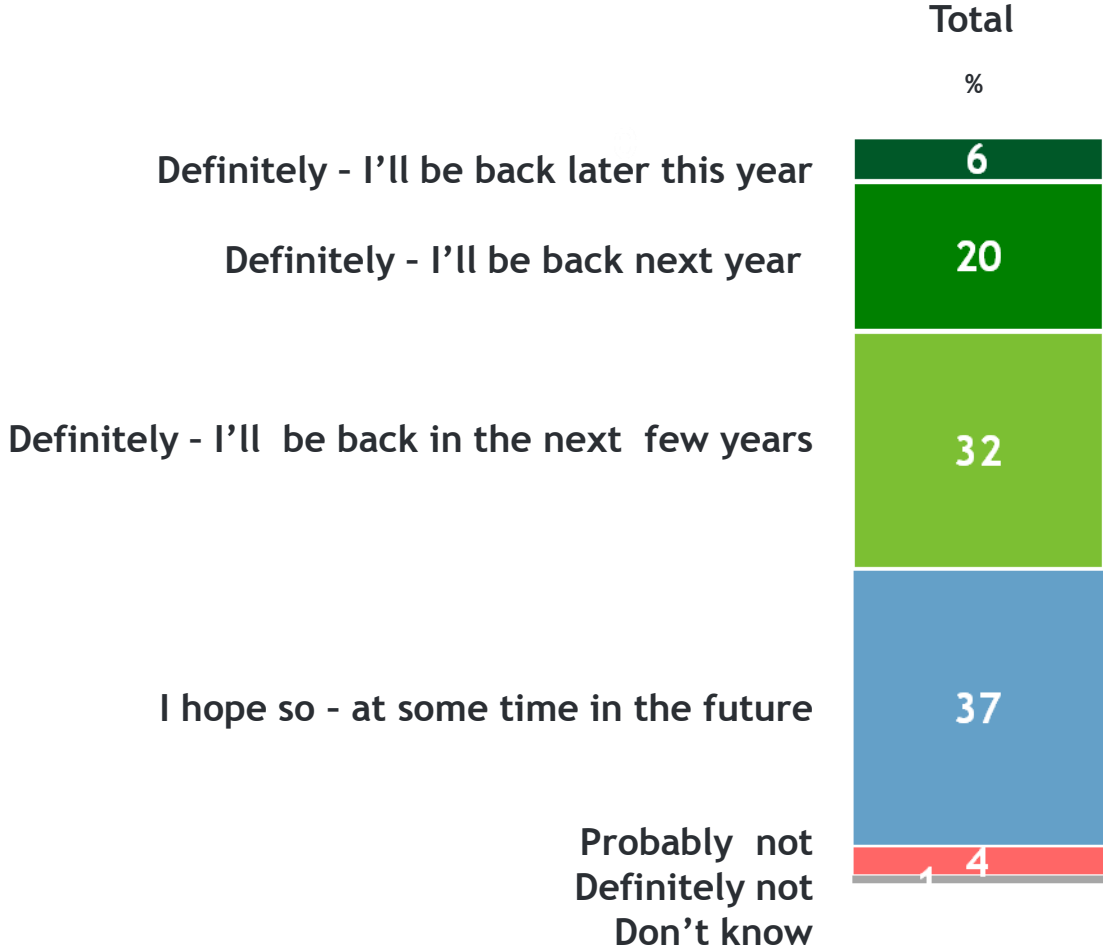
Base: ROI Visitors 130



Which one of these statements best describes the likelihood that you will take a holiday again in Ireland in future?

Likelihood of Returning to the Republic of Ireland for a Holiday in Future

Base: International Visitors - 389



Which one of these statements best describes the likelihood that you will return to the Republic of Ireland for a holiday in future?

Summary and Key Conclusions



Summary and Key Conclusions

- The 500+ visitors in our survey covered 29 nationalities (25% Irish) and were broadly spread across the key destinations.
- The level of participation across a broad range of activities is striking, regardless of gender, age, party size or nationality.
 - ❖ The level of female participation in a cross-section of activities is especially notable.
- However, younger visitors (especially domestic) can feel the domestic offering focuses on older age groups:

“Things aren’t geared for younger tourists, you visit some areas and they just seem suited to pensioners”.
- Participation in walking, visiting historical and cultural activities and enjoying traditional music is at very high levels, as expected.
- Visitors do move between destinations with strong frequency and the issues highlighted around touring by car are the more concerning because of this.

Summary and Key Conclusions

- Profiles of activity participants do confirm that experienced walkers are for more mature age groups.
- Other activities have quite distinct participant profiles: water sports attract younger age groups but are also very popular amongst young families.
 - ❖ Equestrian centres are especially strong among mums and children.
- Overall the level of family participation in activities is consistently strong. Overall, it is the level of cross participation in activities that is especially evident from the survey with visitors typically engaging in 2 to 3 activities.
- In relation to the evaluation of the activity experience, water sports and horse riding received the most positive feedback from visitors.
- Developments in the walking product offering are recognised but key criticisms remain, especially in relation to facilities provided.

Summary and Key Conclusions

- The quality of instruction and guidance across a range of activities received strong praise.
- The chief criticism relates to the pricing of various activities and this again is worryingly prominent across a range of activities.
- Key themes that emerge from the visitor feedback across all elements of the research are:-
 - ❖ Storytelling
 - Visitors value communication and storytelling in all aspects of their holiday experience.
 - This is true whether it be through setting activities in their geographical context or through guiding participants through activities.

Summary and Key Conclusions

❖ Interdependence:

- Visitors typically visit 2 or 3 destinations during their holidays.
- They typically participate in 2 or 3 different activities.
- They strongly appreciate when cross-recommendations are provided for other activities and more information on other activities is available.

❖ Attention to Detail:

- Small features of a holiday can make a big difference
- *“It’s the small things that can make a big difference. How clean is the equipment, how clean are the toilets, knowing the weather forecast and having a packed lunch”.*
- Ancillary costs can also leave a particularly bad taste....
- *“We did a hill walk with a guide and it cost €45, the walk was fine but that is so expensive”.*

Thank you