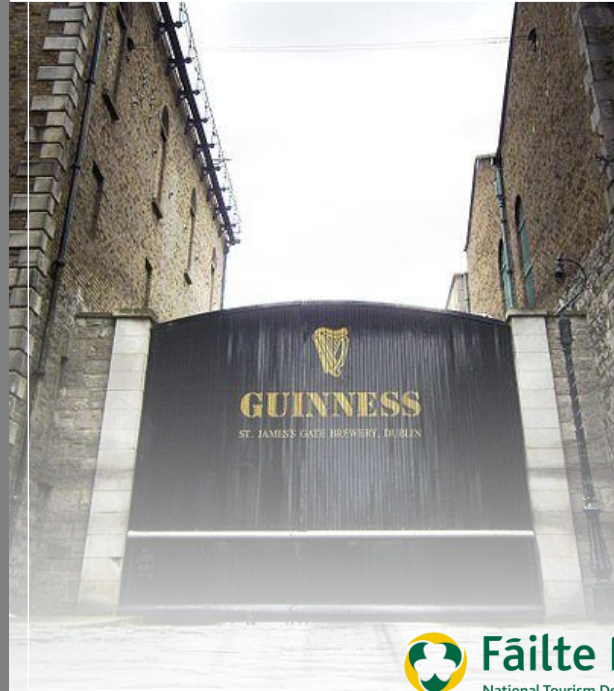


Overseas Holidaymakers' Attitudes Survey Main Markets 2016



Introduction & Overview

The Holidaymaker Attitudes Port study focuses on departing overseas holidaymakers.

Interviewing is conducted in each of the major air and sea ports throughout the Republic.

AIRPORTS - Dublin, Cork and Shannon

SEAPORTS - Dublin, Dunlaoighre, Rosslare and Cork

Millward Brown interviewed **1,996 overseas holidaymakers in 2016**.

Quotas were set to ensure that the sample represents the main markets namely, British, Mainland Europe and Transatlantic holidaymakers

Fieldwork was conducted from **June to October 2016**

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	53	46	52	56	58	56	54
Friends/relatives/business associates	51	54	56	45	43	47	56
Guide books	20	11	24	23	29	24	13
Travel Agent/ Tour Operator	9	4	16	7	8	6	15
Brochures/promotional literature on Ireland	9	4	12	9	8	10	15
Films/movies/TV Drama	7	3	8	9	12	8	8
Travel programmes on TV/radio	6	4	7	7	7	7	8
Advertising for Ireland	6	4	6	7	10	6	8
Tourist Board literature	4	4	3	6	8	4	2
Articles in newspapers/magazines	4	2	4	4	5	4	5



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	80	79	77	83	73	88	78
Friends/relatives/business associates	28	32	29	24	29	21	39
Guide books	23	13	26	27	38	25	22
Travel Agent/ Tour Operator	12	3	19	9	9	11	18
Brochures/promotional literature on Ireland	6	4	7	5	6	6	9
Tourist Board literature	5	4	5	5	10	5	3
Articles in newspapers/magazines	2	2	2	3	3	1	2

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



Base: All using the internet when choosing to holiday in Ireland

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Accommodation provider e.g. Booking.com, Airbnb.com	43	43	41	44	48	41	36
Carrier sites e.g. Ryanair, Delta, Stena, Irish Ferries	42	53	38	41	45	47	44
Review sites e.g. Tripadvisor	42	45	51	34	33	30	34
Tourist Board sites e.g. discoverireland.ie, ireland .com	25	18	22	30	32	36	29
Online travel agents e.g. Expedia, Kayak	22	14	35	17	13	15	15
Social media e.g. Facebook, Twitter, Instagram	20	14	20	20	23	15	27
Price comparison sites e.g. Trivago	13	16	13	10	12	10	18
User generated sites e.g. blogs	11	5	15	11	16	12	8

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



Base: All Using Internet for planning a holiday in Ireland

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Carrier sites e.g. Ryanair, Delta, Stena, Irish Ferries	47	64	39	46	39	52	42
Accommodation provider e.g. Booking.com, Airbnb.com	44	42	42	46	45	46	50
Review sites e.g. Tripadvisor	35	35	43	30	25	26	38
Tourist Board sites e.g. discoverireland.ie, ireland.com	23	15	23	27	25	33	14
Online travel agents e.g. Expedia, Kayak	20	13	31	14	10	10	29
Social media e.g. Facebook, Twitter, Instagram	14	9	13	14	11	8	27
Price comparison sites e.g. Trivago	12	11	15	10	14	7	20
User generated sites e.g. blogs	8	5	8	10	15	10	13



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	92	92	91	93	94	92	90
Easy, relaxed pace of life	72	77	66	74	80	73	74
<u>Environment</u>							
Beautiful scenery	91	82	94	92	90	93	93
Good range of natural attractions	85	77	89	85	87	87	86
Natural, unspoilt environment	82	75	82	86	86	87	79
Attractive cities/towns	80	77	87	75	74	70	82
<u>Value/price</u>							
Good all round value for money	72	79	76	65	64	59	72
Competitively priced air and sea fares	67	75	71	62	66	55	60



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>							
Plenty of things to see and do	91	90	94	89	91	90	94
Safe and secure destination	88	88	90	86	85	84	82
Interesting history/culture	85	77	93	83	80	81	84
Ease of access	78	83	76	77	84	73	73
Size of country manageable for touring	50	45	52	51	53	50	51



Rating of Ireland on Destination (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	99	99	99	99	98	98	98
Easy, relaxed pace of life	93	94	93	93	93	95	89
<u>Environment</u>							
Beautiful scenery	95	92	97	95	94	96	98
Good range of natural attractions	91	84	93	92	90	95	90
Natural, unspoilt environment	90	84	95	89	85	91	86
Attractive cities/towns	89	89	95	85	84	83	87
Litter free/pollution free	81	80	85	78	77	78	81
<u>Value/price</u>							
Competitively priced air and sea fares	79	77	87	74	65	74	75



Rating of Ireland on Destination (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	97	97	98	97	97	96	95
Plenty to see and do	96	96	97	96	94	97	90
Interesting history/culture	95	92	99	92	91	91	97
Ease of access	92	94	92	91	87	91	88
Size of country manageable for touring	83	78	90	81	80	82	80



Overall Value for Money In the Republic of Ireland

Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Very good	17	12	30	10	6	5	14
Good	44	39	44	47	50	42	51
Fair	34	41	25	37	40	48	31
Poor	4	7	1	6	3	5	4
Very poor	*	2	-	*	-	-	1



Overall Opinion of their Irish Holiday

Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Matched expectations	63	74	47	70	68	73	54
Exceeded expectations	36	24	52	28	31	26	46
Did not live up to expectations	1	1	*	1	1	1	1

The Reasons Why Expectations Exceeded

Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Irish People	66	62	68	65	67	71	64
Scenery	64	54	71	60	68	59	57
History/culture	30	31	31	26	28	28	32
Nature/wildlife/flora/fauna	25	14	27	28	23	41	19
Good food quality/variety	22	22	26	17	18	16	25
Weather better than expected	21	23	21	23	30	22	8
Well kept countryside/no litter/neat/ clean	16	12	21	10	10	12	14
Relaxing/slow/easy going	15	21	14	15	17	17	10
Activities – something for all	14	15	19	7	7	6	7
Clean environment/no pollution	12	15	14	11	18	10	5
Good accommodation/range/quality	12	16	14	10	2	13	3
Good internal transport	3	6	1	6	7	6	1

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	14	3	4	5	3	8
Definitely - I'll be back next year	16	34	8	13	15	13	9
Definitely - I'll be back in the next few years	35	28	38	38	39	49	23
I hope so - at some time in future	39	23	46	40	39	31	55
Probably not	2	1	3	2	1	2	4
Definitely not	*	-	*	*	-	*	1
Don't know	1	*	1	2	1	2	1

Advantages – Most Frequently Mentioned

Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
The Irish people	55	51	51	59	66	54	55
The scenery	44	34	52	42	44	48	42
Culture/history	32	26	40	27	29	27	35
English speaking	26	30	39	14	10	16	28
Nature/Ecology	20	9	18	27	24	32	18
Drinks/pubs/pub culture	21	18	19	23	31	25	20
Access/easy to get to	16	32	13	12	18	13	9
Hospitality	15	11	20	13	18	13	17
Interesting towns/villages	11	5	18	8	12	8	9
Unspoilt environment	11	6	15	10	16	12	6
Restful/relaxing	10	12	12	7	7	8	8
Ancestral/family connections	8	7	16	2	3	2	12

Disadvantages – Most Frequently Mentioned

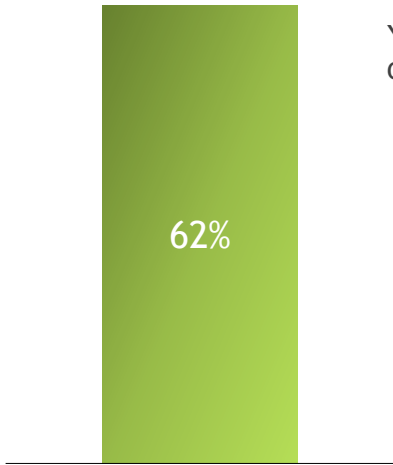
Base: All Respondents

	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Weather	23	22	18	26	32	20	35
High cost of living/expensive	7	13	4	7	8	8	4
Drink costs	8	11	3	11	12	17	5
Driving difficult	8	*	13	8	9	9	3
Food poor quality/lack of variety	7	9	1	9	9	10	7
Bad roads/poor condition/lack of motorways	4	4	4	5	8	6	1
Accommodation costs	3	4	1	4	4	3	5
Poor signposting	4	3	5	3	5	5	6
High cost i.e. souvenirs	3	4	1	2	4	3	5
Poor internal transport	3	2	4	3	3	2	4
Exchange rates	3	8	2	1	-	1	2

Would Ireland be Recommended..?

The scale below is based on top two boxes - respondents have given a score of 9 or 10 (out of a possible 10 – ten is definitely recommend

Base: All Respondents



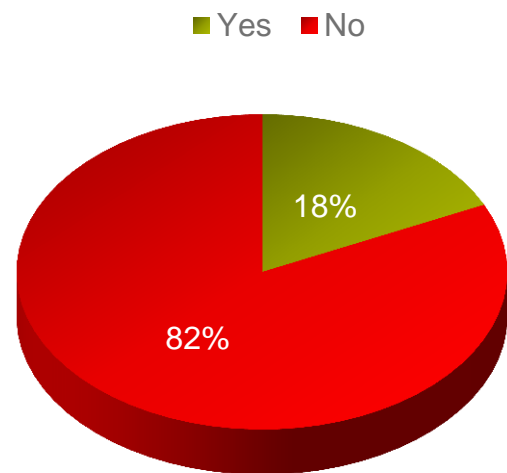
Yes,
definitely



	%
Britain	58
North America	77
Mainland Europe	52
France	54
Germany	53
Rest of the World	70

Plans to visit other locations but did not get to do so....









Base: All Respondents



Reasons	Total %
Lack of time	76
Weather	10
Underestimated time of travel	9
Too much to do in other locations	8
Poor transport	6
Decided to stay longer in other places	3
Other places recommended during the trip	2










Types of transport used during your stay in Ireland

Base: All Respondents

		Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
 Dublin Bus	City Bus (Dublin, Cork, Limerick, Galway)	24	17	22	29	27	31	25
	Taxi	24	23	30	19	19	12	36
	Airport Bus	21	17	19	24	24	20	20
	Intercity Bus	12	6	13	16	17	18	6
	Luas/Tram	9	7	8	10	11	11	13
	DART	8	5	7	9	7	8	11
	Intercity Train	4	1	5	5	5	4	7
	Commuter Train	3	2	4	4	3	3	1
	City Bikes	1	*	1	2	1	1	*

Rating of Transport System – Satisfaction

Base: All who used the type of transport

Type of Transport		Very Satisfied %	Fairly Satisfied %	Neither satisfied nor Dissatisfied %	Fairly Dissatisfied %	Very Dissatisfied %
 DART*	DART*	75	24	1	-	-
 Commuter Train*	Commuter Train*	71	26	2	1	-
 Dublin Bus	City Bus (Dublin, Cork, Limerick, Galway)	68	28	3	1	*
 Airport Bus	Airport Bus	78	18	3	*	*
 LUAS	Luas/Tram*	74	22	2	2	*
 City Bikes*	City Bikes*	85	11	-	4	-
 TAXI	Taxi	68	26	3	3	1
 INTERCITY	Intercity Train*	71	22	3	3	-
 Intercity Bus	Intercity Bus	64	27	4	4	1

*Small base here

What mode of transport used to get to the air or sea port today

Base: All Respondents

Type of Transport	Total %	Britain %	North America %	Total Mainland Europe %	France %	Germany %	Rest of World %
Hire Car	26	13	36	24	13	33	23
Dublin Bus Airport Express	18	16	14	23	16	21	15
Taxi	17	16	20	14	13	9	24
Dublin Bus	7	5	7	8	8	8	7
Private Aircoach	6	5	8	5	7	4	5
Other Car (i.e. lift to the airport)	6	11	3	6	12	3	3
Escorted Tour Coach	3	*	5	2	1	3	4
Other	17	34	7	18	30	18	14

Key Findings – I

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

- The overall landscape In terms of sources of information for holiday planning for 2016, is similar to last year and once again the internet was the most important source for both the choice and planning for holidaymakers coming to Ireland.
- Advice from friends, relatives and business associates follows and we see an increase in this channel this year among North Americans and rest of the world.
- Travel agents continue to be an important source of information for holidaymakers from North America.

Key Findings – II

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

- In 2016 carrier sites such as Ryanair, Delta, Irish Ferries remain the most important channels. Review sites such as Tripadvisor hold second place position with just over four in ten of holidaymakers selecting these internet sites, Europeans still claim to use review sites less.
- Accommodation providers such as booking.com, and Airbnb are used slightly more by Mainland Europeans particularly the French and Germans and holidaymakers from further afield (when planning).
- Tourist board sites such as discoverireland.ie are used by a quarter of holidaymakers (when choosing) and this is highest among French and Germans and other holidaymakers.
- Price comparison sites are used by just over one in ten across all markets.
- Social Media usage is increasing across most main markets – for both choosing and planning holidays

Key Findings III

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. However, there is a slight fall in this measure versus the 2015 study. Respondents across all of the markets see this as very important with over nine out of ten claiming this is key.
- A relaxed and easy pace of life is important to the British and French holidaymakers and this is consistent with last year.
- Beautiful scenery remains a very important factor along with a good range of natural attractions. A natural unspoilt environment and attractive cities and towns remain very important to holidaymakers and this is key for North Americans. A secure and safe destination is still considered to be an important consideration. Holidaymakers expect to have plenty of things to do and see with interesting history and culture.
- Seven out of ten are looking for value for money – and as you might expect with Brexit this is now particularly important to the British along with competitive air and sea fares.

Key Findings – IV

Satisfaction on experiences of Ireland – SATISFIED

- All holidaymakers are very satisfied with both the hospitality and friendliness of the people, this is claimed by nine out of ten across all of the main markets. The scores here are exceptionally high. Over nine out of ten are very satisfied with the easy and relaxed pace of life.
- Overall satisfaction with the environment remains high. Holidaymakers are satisfied with the beautiful scenery, and the natural, unspoilt surroundings. Over nine out of ten claim they are satisfied with the range of natural attractions, and are satisfied to find attractive cities and towns.
- Holidaymakers are satisfied with the history and culture and one in eight are satisfied that Ireland offers a suitable offer for touring.
Over three quarters claim that air and sea fares are competitive, this year, we see an increase with satisfaction levels for this measure among the North American market on air and sea fares which is encouraging.
- Overall value for money remains more or less on par with 2015 with just under two thirds claiming value for money is either very good or good. As you would expect with the currency fluctuations for sterling vs the euro, the value for money for the British market shows a decline and this changes/fall in sterling was very volatile throughout the summer months (so during the main fieldwork period following the Brexit vote in June of 2016).

Key Findings V

Overall expectations

OVERALL EXPECTATIONS

- Over two thirds of respondents claimed that their holiday expectations were indeed met, and just over a third claimed that their holiday exceeded their expectations so the overall trajectory remains very positive.
- Similar to the 2015 VAS, the main reasons given are the Irish people, the scenery, history and culture, and flora and fauna, nature. Food, both quality and variety, also features.
- The weather did not fare quite as well in 2016 as in 2015.

Key Findings VI

Likelihood of returning to Ireland for another holiday & recommendation of Ireland

- Over half of respondents claim that they will definitely return to Ireland in the next few years. This was highest among German, French and North American holidaymakers.
- Over nine out of ten of holidaymakers hope to come back at some point in the future.
- Over six out of ten respondents would definitely recommend Ireland for a holiday and this is highest among North Americans.

Key Findings VII

Advantages & Disadvantages that distinguish Ireland from other similar holiday destinations

ADVANTAGES

- Irish People
- The scenery
- Culture & history
- English speaking
- Nature & ecology
- Drinks/pubs/pub culture
- Access/easy to get to
- Hospitality
- Interesting towns/villages
- Unspoilt environment
- Restful & relaxing
- Ancestral/family connections

DISADVANTAGES

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

Key Findings VIII

Plans to visit other locations and why did not get there...

Over eight out of ten claim that they did plan to visit other locations on their trip, but for various reasons they did not manage it. The top three reasons are as follows with lack of time being the predominant reason across all of the main markets

REASONS

- Lack of time
- Weather
- Underestimated travel time

Key Findings IX

Types of transport used during stay in Ireland and satisfaction. Mode of transport used to get to the air/sea ports on departure

City buses and taxis were the most popular public transport. The French and Germans were most likely to use city buses.

Taxis were used by a third of North Americans and by over a third from those from more far reaching places.

Airport bus was the third most popular form of transport - in particular among French and Mainland European holidaymakers.

Levels of satisfaction for those who used different types of transport was in the main positive and this was a trend across all of the markets.

Over a quarter arrived at the air/sea port in a hired car, followed by Dublin Bus Airport Express. Taxis were the third most common mode of transport used to get to the air/sea port.

As you would expect arriving at the air/seaport by hire car was highest among the US market followed by Dublin Bus (Airport Express) by mainland Europeans

Overall Conclusions – I

- Holidaymakers to Ireland want to experience friendly and welcoming people. They expect an easy and relaxed pace of life along with an unspoilt environment, beautiful scenery and plenty to do and see. These expectations are indeed being met - overseas holidaymakers remain very satisfied with these key factors and there is clearly a positive narrative from this research.
- History and culture remain important for holidaymakers.
- The internet dominates as the primary source of information for choosing and planning the holiday and this alongside advice from friends/family and guide books are the most important tools when researching a holiday in Ireland.

Overall Conclusions – II

- In the main overseas holidaymakers to Ireland are satisfied with the value for money and this remains at a similar level to the 2015 survey. However, as the world is experiencing some quite fundamental changes, this key area needs to remain top of mind for the industry and Ireland still needs to be seen as offering good value for the holidaymaker.
- At the end of their trip, holidaymakers claim to feel good, are sad to go home and glad they came.
- The expectations of their holiday have in the main been met and in some instances exceeded, but this is a key area to keep focus on as we are seeing some changes and shifts among the British and German markets in particular.
- Under two thirds say that they would definitely recommend Ireland for a holiday
- So once again this year, overseas holidaymakers claim to have had a memorable and fulfilled holiday in Ireland, over 95% claiming that they will return at some point in the future. But there is a need to focus on maintaining the positive, unique and memorable experience for holidaymakers who come to Ireland both in the short and long term and to continue to offer good value for money.

Overseas Holidaymakers' Attitudes Survey Main Markets 2016

