Visitor Attitudes Survey 2010
Executive Summary

Prepared for

Fáilte Ireland
National Tourism Development Authority

by

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Key Research Objectives of the Visitor Attitudes Survey

1. Investigate the main motivations for visiting Ireland and identify the key factors influencing the decision to holiday here.
2. Evaluate satisfaction levels with key aspects of the Irish tourism product.
3. Measure the fit between expectations and the reality of the Irish holiday experience.
4. Assess the perceived advantages and disadvantages of Ireland as a holiday destination.
5. Understand the information gathering process involved in choosing the destination and in planning the trip.
6. Specifically in 2010 - examine perceptions of the urban and rural environment in Ireland.

Research Methodology - A postal self-completion survey

The survey sample comprises a cross section of overseas holidaymakers to Ireland from the main markets, contacted at major air and sea departure points. In a screening interview, qualifying respondents are selected from the total contact sample on the following basis:-

- **Main purpose** of visit to Ireland – **holiday**
- **Exclusion of Irish born** visitors, both respondent and others in the travelling party
- Duration of stay – **at least one overnight**

Qualifying contacts are given a self-completion questionnaire (return postage paid) in their mother tongue and a covering letter from Fáilte Ireland, outlining the purpose of the survey. Questionnaires are provided in English, French, German, Italian, Spanish and Dutch. At the allocation stage, names and addresses are collected in order to follow up non-responses.

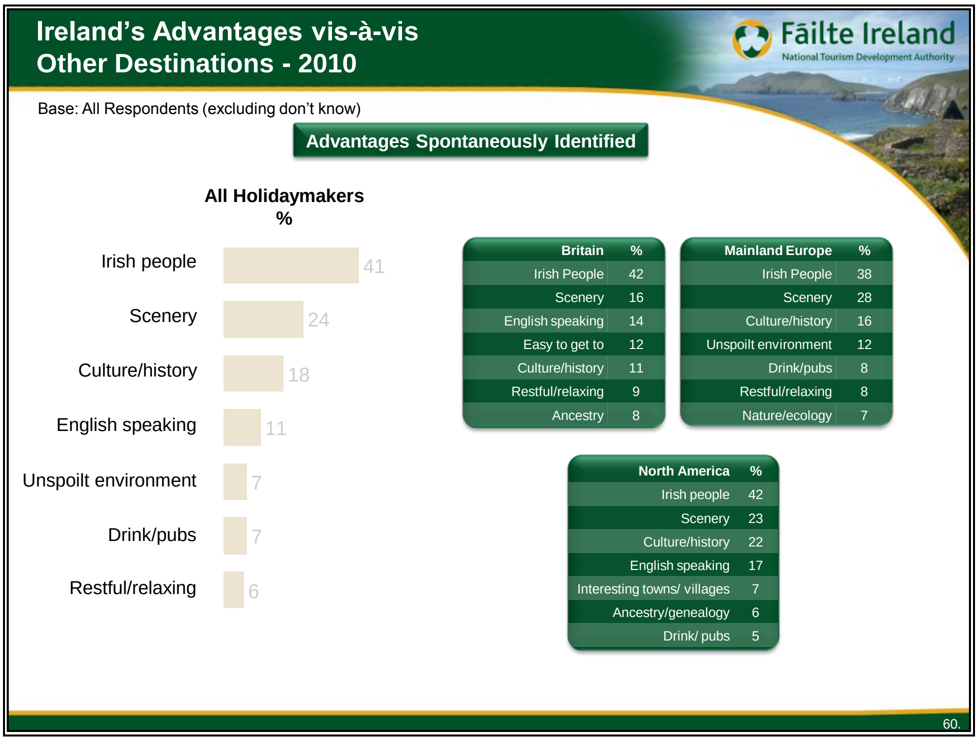
- Fieldwork period: May – October 2010.
- Successful placements: 11,412 questionnaires.
- Successful returns: 4,816 questionnaires, a response rate of 42%.

Note: In a self-completion survey, representativeness of the respondent sample cannot be assured. In the case of the Visitor Attitudes Survey, the demographic profile and characteristics of respondents differ from the total non-Irish born holidaymaker profile in that respondents tend to be older and predominantly ABC1, with an above average length of stay in Ireland and a higher propensity to take touring holidays. Caution is advised, therefore, in applying the findings of the Visitor Attitudes Survey to the wider holidaymaker population.

Key Destination Issues in 2010

Among the factors that are considered to set Ireland apart from other destinations offering a similar experience, the beauty of the scenery and friendliness and hospitality of the Irish people dominate holidaymakers' perceptions. Over the years, these always have been the principal distinguishing factors **spontaneously** associated with Ireland and 2010 is no different.

At an overall level and across the main markets - Britain, North America, France and Germany - the Irish people are ranked as the **top positive discriminator** compared to other holiday destinations, ahead of scenic attractions. British and North American holidaymakers give particular prominence to the Irish people relative to scenic attractions, undoubtedly reflecting a shared and strong ethnic and cultural identity which in turn leads to a particular affinity for the Irish people.



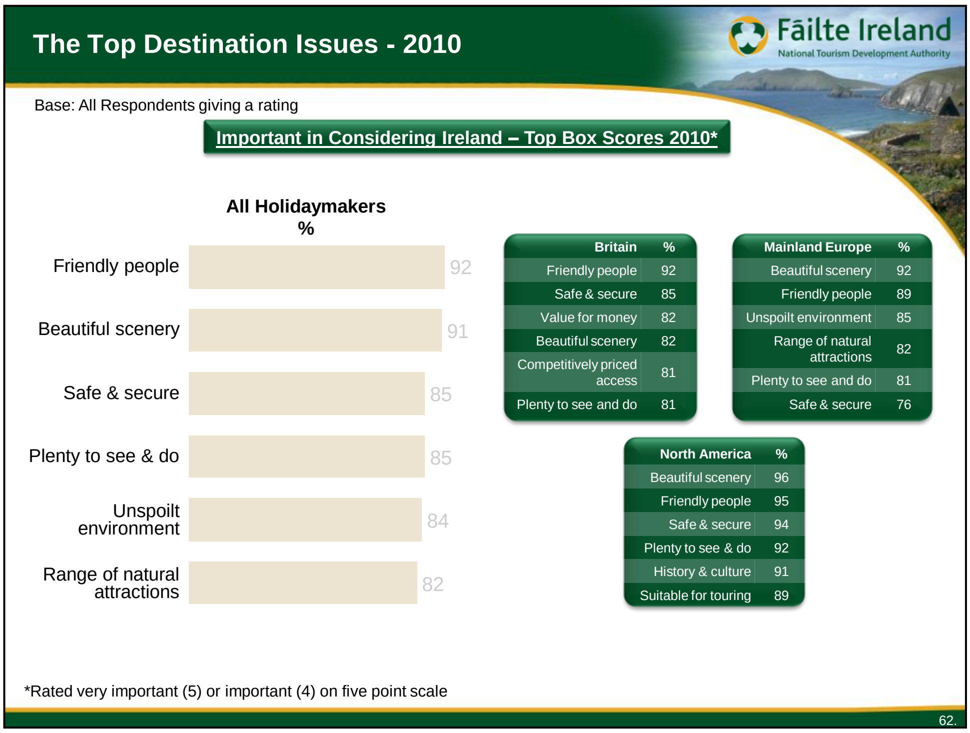
Other distinguishing advantages **spontaneously** identified are our cultural and historical heritage, particularly significant for North American visitors. The fact that we are English speaking is also obviously a comfort factor for both North American and British holidaymakers, obviating the need to wrestle with a sometimes unfamiliar culture in a language that is not their own. Unsurprisingly, ease of access features as a particular advantage for British holidaymakers.

Nature and ecology (15%) and an unspoilt environment (11%) are noted as positive features of Ireland by German visitors. In terms of social activity, Irish pub culture remains on the radar particularly for both French and German visitors with, one in ten singling this out as a positive discriminator for Ireland.

Destination Determinants and their Importance in Choosing Ireland

Reiterating the themes of friendliness and scenic attraction already noted these are selected as the most important aspects from a wide range of factors that might influence the choice of a holiday destination. Safety and security, plenty to do and see, an unspoilt environment, the range of natural attractions, and interesting history and culture also feature strongly and are mentioned by at least eight in every ten holidaymakers. The anticipation of a new destination to discover (75%), attractive cities and towns (74%), an easy and relaxed pace of life (74%) and good all round value for money (74%) also rate highly.

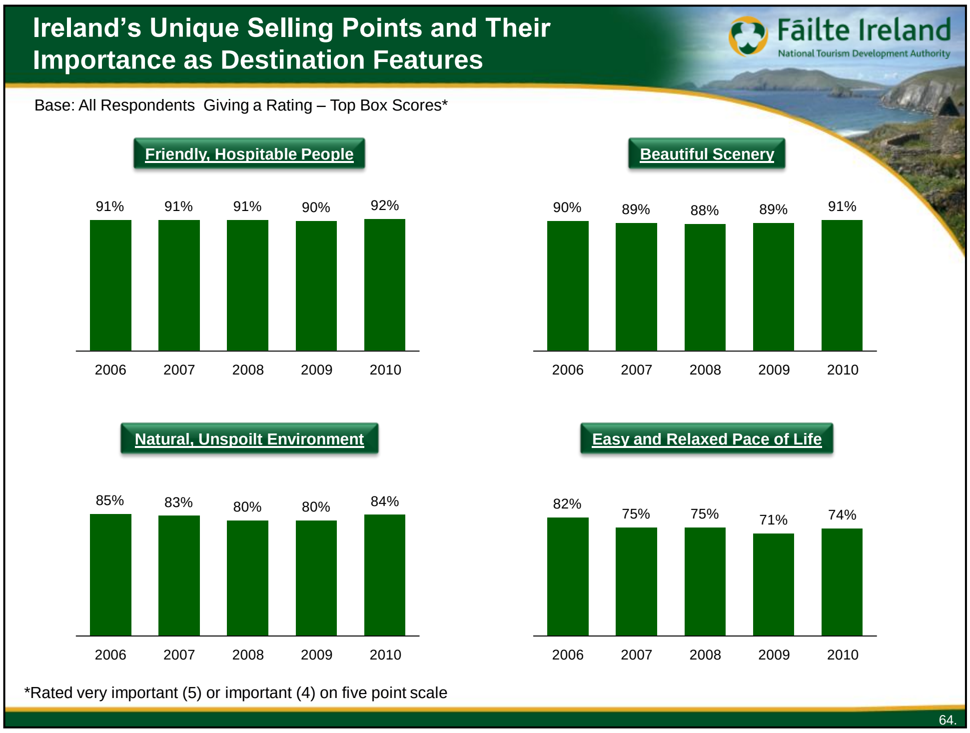
These generally comprise the fundamental influences in choosing Ireland, but there are some market divergences reflecting both the mind-set and the practical requirements of particular nationalities. For example, history and culture features strongly for North Americans (91%). Value for money (82%) and competitive air and sea fares (81%) are high up the agenda for British holidaymakers. An unspoilt environment (85%) and the range of natural attractions (82%) resonate with Mainland European visitors, particularly those from France and Germany.



The principal factors of friendly people and scenery have remained very consistent from year to year in terms of their importance. The slight fall-off noted in recent years in the importance of factors such as a natural, unspoilt environment and an easy and relaxed pace of life has been arrested, with increased importance attached to these in 2010. This change may well owe something to the lower emphasis on city breaks during the period May and October 2010, with 13% of holidaymakers describing their holiday in Ireland as a city break compared with 20% in 2009. This is more akin to the picture in 2006 when city breaks accounted for 14%. Interestingly, in that year environment and pace of life also achieved very high importance ratings. The proportion describing their holiday as predominantly countryside has remained static at 33% in 2010, but the proportion having a combination city/urban and countryside holiday is at its highest level (45%) in the last five years.

From a market perspective, the incidence of city breaks in 2010 remained highest among British holidaymakers (19% versus 27% in 2009). Seventeen per cent of Mainland Europeans described their visit as a city break, down from 21%. Though the incidence of city breaks for Scandinavian (39%) and Spanish (33%) holidaymakers was generally on a par with 2009, this was much reduced among Italian visitors (22% versus 35%). City breaks were least likely to feature among German and French holidaymakers, each at 12%.

As in previous years, the research indicates that reinforcement of important destination features such as friendly, hospitable people, beautiful scenery, an unspoilt environment and a relaxed pace of life will remain imperative in discriminating Ireland from other similar destinations.



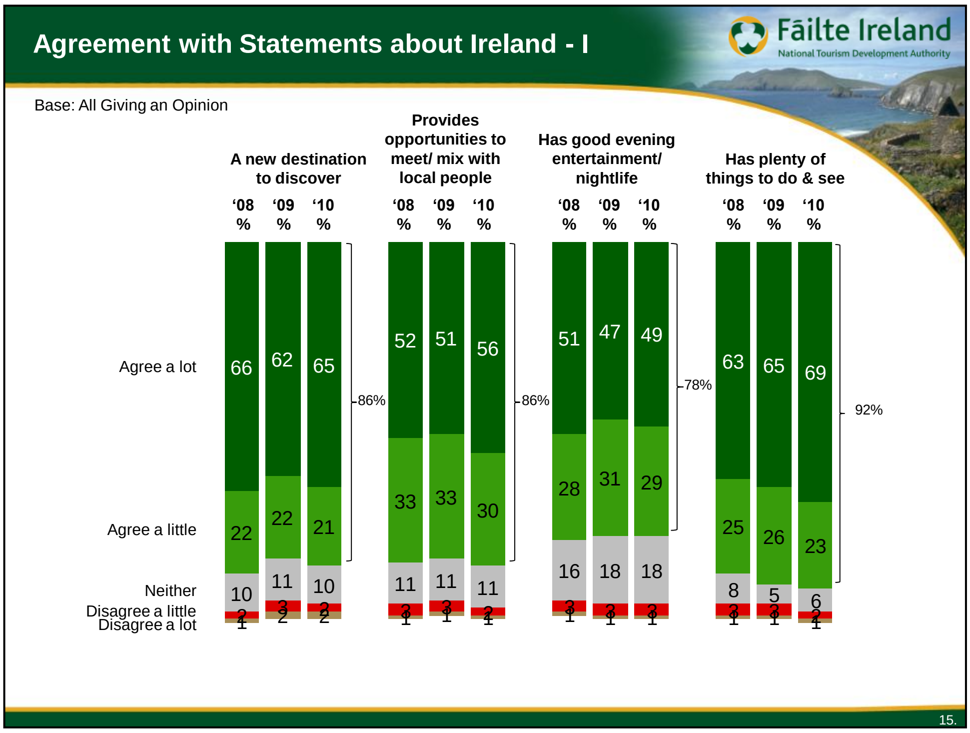
Key Areas of Satisfaction

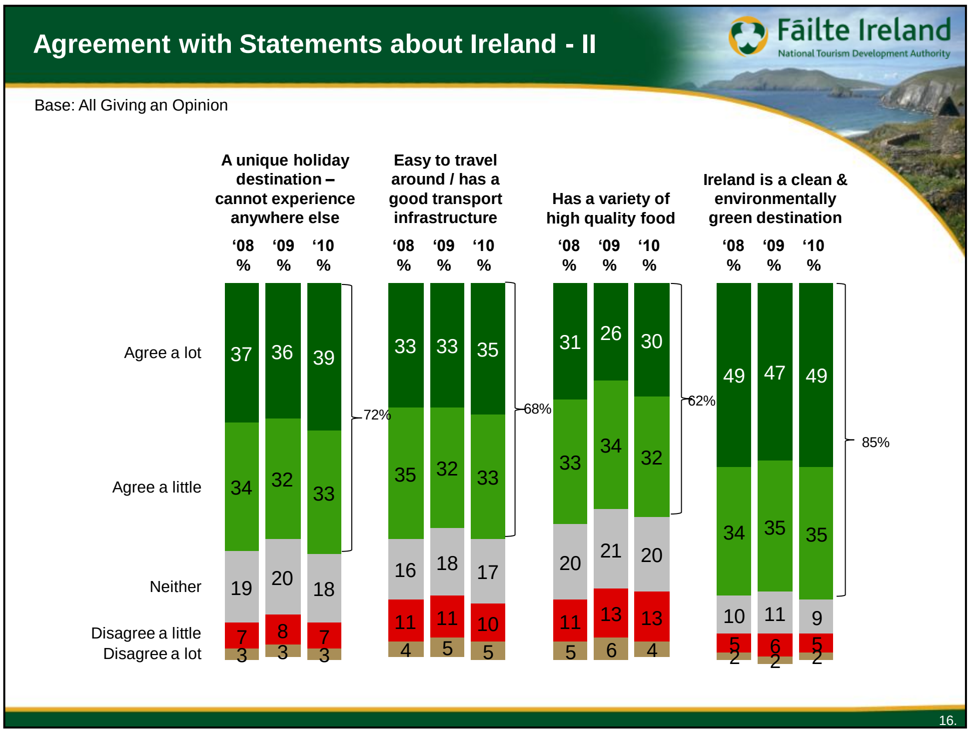
The vast majority of holidaymakers are satisfied with those features identified as the top ranking motivations for choosing to holiday here. Across all the main markets, beautiful scenery and the friendliness and hospitality of the Irish people receive a virtually unanimous vote of satisfaction. Other aspects achieving strong endorsement were the relaxed pace, unspoilt environment and the range of natural attractions. Likewise there were few fears about safety and security with the vast majority satisfied on this score.

Nature, wildlife and flora have a particular resonance with Mainland European visitors, especially those from Germany (94%) and are also widely appreciated by North Americans. The high level of importance attached to history and culture by North Americans is clearly matched, with 95% satisfied with this aspect of their visit.

In addition to rating their satisfaction with a range of destination features, holidaymakers were also asked to indicate whether they agreed or disagreed with a series of propositions regarding Ireland as a holiday destination, based on their own experiences during their stay. These propositions ranged from perceptions of Ireland as a new discovery for the holidaymaker and a unique destination unlike anywhere else, to the more practical considerations of internal transport, food quality, evening entertainment, and the variety of activities and experiences.

The reactions of those who responded to each of these factors suggests a largely positive outlook, with at least two in three agreeing strongly that Ireland is a new destination to discover and that it offers plenty to do and see. The majority also agree to a greater or more modest extent with each of the other propositions, the only notable levels of dissent being in relation to the more practical elements of transport infrastructure and the variety of high quality food. Although elements such as these do not feature in the first rank of factors considered important in choosing Ireland, they do contribute significantly to the overall experience, raising the spectre of poor experiences having a negative impact on the holiday as a whole.





Although these findings reinforce the general perceptions of Ireland as a holiday destination, the proportions giving the highest level of endorsement (those **agreeing a lot** with each proposition) suggest that reaction is more circumspect for some dimensions. For example, with the benefit of their experiences just under two in five (39%) **agree strongly** that Ireland is a unique destination, unlike any other and although the proportions disagreeing are low (10% disagreeing a little or a lot), almost one in five are non-committal on this issue.

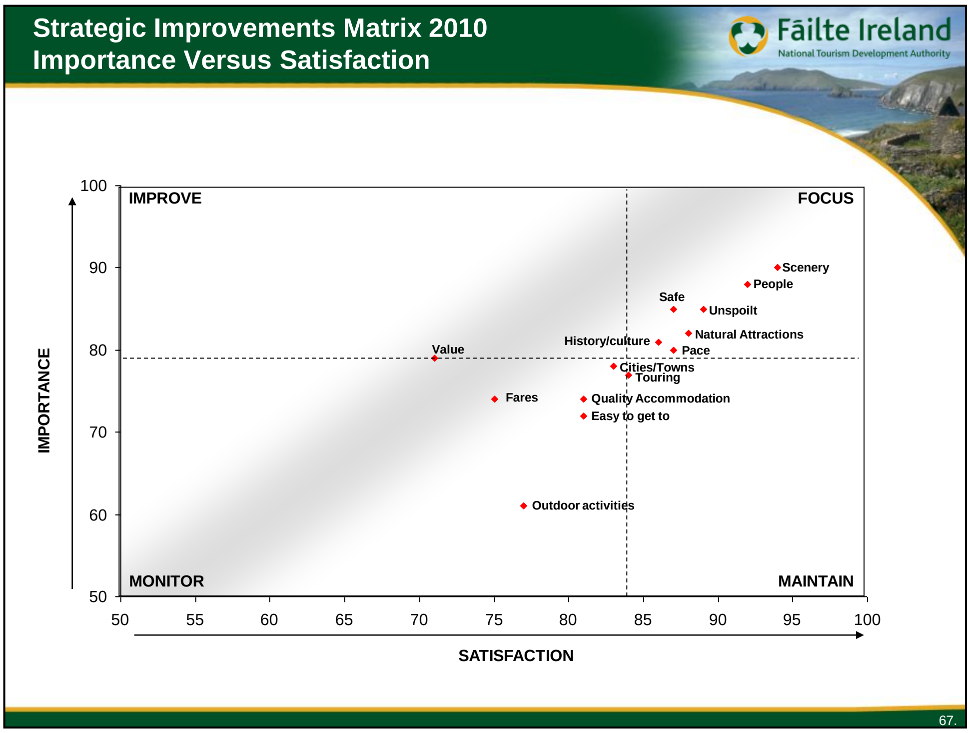
The positive and negative aspects of the Irish holiday experience, evidenced by levels of satisfaction of *85% or higher* or dissatisfaction of *8% or higher* with a range of destination determinants, are shown below. Undoubtedly, Ireland continues to deliver a strong performance overall. While the challenge always will be to maintain high levels of satisfaction on a range of important destination features, particularly in the face of recent concerns regarding value for money, it does seem that the good value to be had in many areas of Irish tourism 2010 has paid dividends, with a much lower level of negative comment on all round value for money.

Positives	**2009** %	**2010** %
Beautiful scenery	95	96
Friendly and hospitable people	94	95
Safe and secure	89	90
Unspoilt environment	87	90
Easy, relaxed pace of life	88	88
Nature, wildlife, flora	85	88
Good range of natural attractions	85	88
Interesting history and culture	85	87
Negatives		
Good all round value for money	21	13
Litter and pollution free	9	8
Competitive air and sea fares	9	8

Matching Satisfaction to Importance

Matching satisfaction to the importance attached to the various attributes that go to make up the Irish holiday experience shows where promotional efforts are best directed and performance needs to be enhanced. This clearly indicates that Ireland performs well on its principal USPs and demonstrates the importance of continuing to focus promotional efforts on those strengths that differentiate us from other holiday destinations – beautiful scenery, friendly people and the relaxed pace of life.

Value for money remains a relatively important factor with a lower satisfaction rating compared to other factors. While it has moved in a generally positive direction in 2010, it still straddles the “improvement” and “monitor” quadrants. Some other factors have a lower level of importance in choosing Ireland. While they perform well, they still fall some way short of the very high levels of satisfaction noted for our primary USPs. Examples are the cost and ease of access, good quality accommodation, and opportunities for outdoor activities. These may not be strong determinants in choosing Ireland, but they form an important part of the holiday and so merit consistent monitoring in order to enhance the overall holiday experience.



Results in 2010 again demonstrate Ireland’s capacity to exceed holidaymakers’ expectations (36%). Indeed, the proportion agreeing that their expectations were exceeded is at its highest level in the last five years, with the Irish people (44%) and scenic attractions (40%) the primary contributors to this very positive endorsement.

Other factors, such as history and culture, food quality and variety and, of course, the weather also contribute, albeit at a much lower level.

By continuing to **focus** on those factors that are the quintessential elements of the Irish holiday, while at the same time **monitoring** and **improving** our performance on those factors which perhaps constitute less of an emotional appeal but are more concerned with practicalities, we should be able to maintain the high levels of satisfaction our visitors consistently exhibit.

The Importance of the Environment

With the constantly growing emphasis worldwide on environmental issues and a green agenda, and with the sustainability of Irish tourism dependent on the extent to which our environment actually matches the image propagated, it is encouraging to see that Ireland continues to perform quite well in the opinion of our visitors as a clean and environmentally green destination. In 2010, approximately half (49%) agreed strongly with this proposition and net agreement (agree strongly/slightly) stands at 85%, slightly ahead of the outcome in previous surveys. Outright disagreement with this proposition has remained low each year, with just 7% adopting a negative stance in 2010. Likewise, the level of non-committal response remains low at around one in ten.

Some Areas of Concern

Expense/value for money

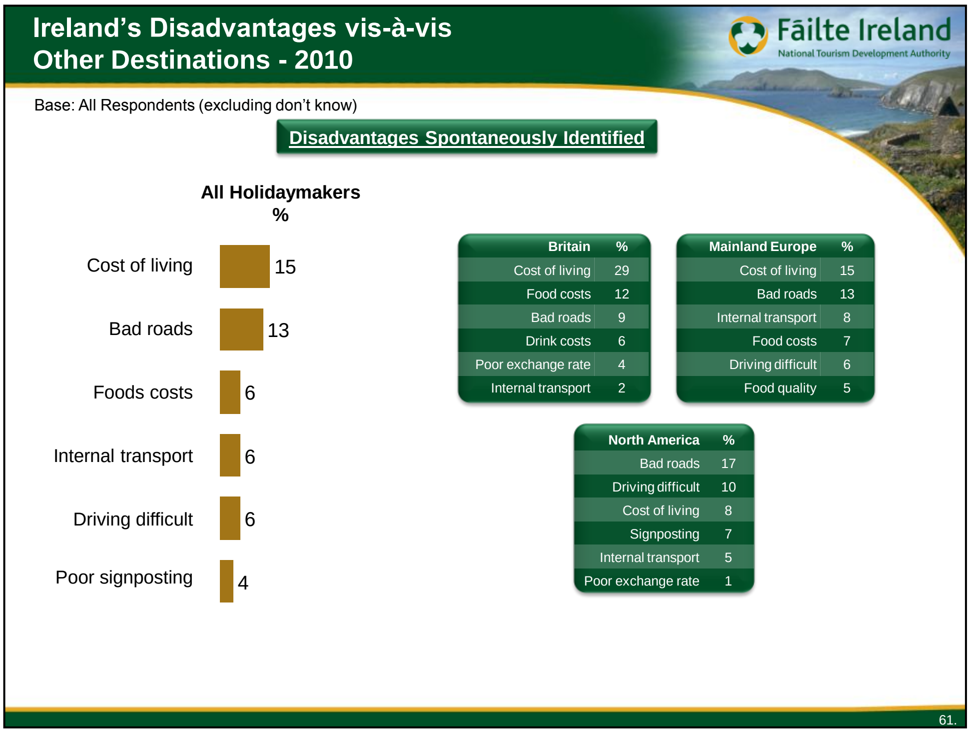
While it is particularly encouraging to see the level of spontaneous mention of the high cost of living as a disadvantage decline from a high of 25% in 2009 to 15% in 2010, the cost of living in Ireland remains a disadvantage for some relative to other similar destinations.

While the extreme financial and economic turbulence internationally would have been a contributing factor in 2009 in deteriorating attitudes regarding value/cost of living, it does seem that the remedial action taken across various sectors of the industry has paid dividends for those who did visit. Although we do not know to what extent the decision to visit might have been directly as a result of special offers available, many of those who did visit would have benefited by the special value on offer, leading to a less negative reaction to the cost of living.

Though good all round value for money is not in the first rank of factors in considering Ireland for a holiday, it is undoubtedly important, particularly in the continuing recessionary times. Seventy four per cent overall nominate this as important, rising to over 80% for British and North American visitors. Satisfaction with this aspect has improved with 56% satisfied compared with 49% in 2009. Furthermore, the level of dissatisfaction has declined from 21% in 2009 to 13% most recently.

However, there is no room for complacency as value/cost of living undoubtedly will continue to be important in the perception of the Irish tourism product into the future.

Perceptions of value improved across all market areas, though this remains more challenging for the British market than elsewhere. Sterling exchange rates appeared less critical for the British in 2010, with just 4% mentioning this compared with 11% in 2009 and this may have helped cost of living perceptions. The proportion of British holidaymakers citing the high cost of living as a disadvantage in 2010 was down twelve percentage points since 2009, to 29%. Second to the British, one in four German holidaymakers (24%) noted the high cost of living, compared to 32% in 2009.



Roads/Driving/Internal Transport

Over the years, other issues that arose consistently included bad roads, poor signposting, difficult driving and inadequate or poor internal transport. With a high volume of car touring holidaymakers and a strong perception of Ireland as a touring destination, a well-developed road network and good signposting are very important contributors to a satisfactory experience. It is of some concern, therefore, to see a slight rise in the proportion spontaneously mentioning 'bad roads' as a disadvantage, up from 10% in 2009 to 13% in 2010. Perceptions of poor signposting have not increased, however, with overall mention remaining at 4%, though somewhat higher for North Americans (7%). Predictably, critical assessment of roads (17%) and driving (10%) tends to be above average among North American holidaymakers. French and German visitors also appear somewhat scathing of our roads. Negative assessment of our internal transport infrastructure has remained relatively static at 6% overall in recent years, though slightly higher among Mainland Europeans (8%).

Products & Services

Holidaymakers were asked to rate their satisfaction with the quality, customer service and price of the various products and services they had used during their holiday, using a five point rating scale ranging from 'very satisfied' to 'very dissatisfied'.

- ***Paid Serviced Accommodation***

  Top grade hotels and Irish Homes/Guesthouses achieve very high satisfaction ratings on quality and customer service, with around nine in every ten users either very satisfied or satisfied. Somewhat lower satisfaction ratings are recorded for medium/other grade hotels suggesting that though the majority are satisfied, standards may not always reach customer expectations. For each category of accommodation in the paid serviced sector satisfaction with price is also generally positive, although lagging behind perceptions of quality and customer service. It is particularly gratifying, however, to see considerable improvement in satisfaction with price in 2010, particularly in the hotel sector, reflecting the concerted efforts of the sector to offer good value. Dissatisfaction with price in hotels was roughly halved, ranging between 7% and 8%. In other serviced accommodation, price was also more positively assessed in 2010.

- ***Self-catering Accommodation***

  Rented self-catering accommodation earned high net satisfaction ratings on both quality (87%) and customer service (81%), with a lower net satisfaction on price (71%). At least three in every four hostel users were satisfied with quality and customer service and seven in ten with the price they paid. Net satisfaction with quality in the caravan and camping sector (74%) was ahead of 2009, and customer satisfaction was also well rated (74%). Price, however, was clearly an issue, with just 47% satisfied and over one quarter dissatisfied, up on the level of dissatisfaction reported in 2009.

- ***Food Services***

  Historically, price has tended to be an issue across the range of food outlets, however the result is more positive in 2010, with an improvement in net satisfaction levels with price in all categories of food outlets. The highest level of satisfaction was recorded in the Irish Homes/Guesthouse sector (72%) and the most significant upturn was in the hotel sector – up thirteen percentage points from 49% in 2009 to 62%. Net dissatisfaction remains highest for budget restaurants (20%) followed by high quality restaurants (17%).

Across the range of food service outlets net satisfaction with quality predictably peaks for high quality restaurants (90%) and is lowest in the budget restaurant sector (72%). Customer service follows a similar trend, albeit with slightly higher net satisfaction scores across most outlets than is the case for quality.

In 2010, 29% of consumers were dissatisfied with the price of alcohol, compared with 43% in 2009 and 43% are satisfied (28% in 2009), a much more positive outcome.

- ***Internal Transport***

  Despite some spontaneously expressed reservations concerning internal transport facilities, and some disagreement (15%) regarding the ease of travelling around the country/good transport infrastructure, net satisfaction with intercity bus and rail services is high, exceeding 80% for both on quality and approaching 80% on customer service. Seven in every ten are also satisfied with price for these services. Net dissatisfaction with price on intercity rail (12%) is lower than in 2009 (16%). Among the other internal transport options, overnight coach tours received the highest level of approbation on all three measures – quality (94%), customer service (95%) and price (84%), replicating the high levels of satisfaction noted in previous years. Across the range of options, net satisfaction with price is lowest for car hire (52%) and taxis (57%), though quality and customer service are more favourably regarded for both.

- ***Historical & Cultural Attractions***

  Covering historic houses and castles, monuments and historic sites, gardens, heritage/interpretative centres and museums and art galleries, these constitute an important feature of the holiday, with over three in every five (62%) visiting any of these attractions. Their range and quality is generally very well rated, with net satisfaction scores in excess of 80% for all on both these attributes. Inevitably, price tends to be less favourably regarded. There is little change since 2009, with net satisfaction with admission charges ranging from 56% for Historic Houses/castles, 68% for Museums/Art Galleries (these perhaps benefiting for the level of free entry, particularly to the more important national institutions) to 70% for gardens.

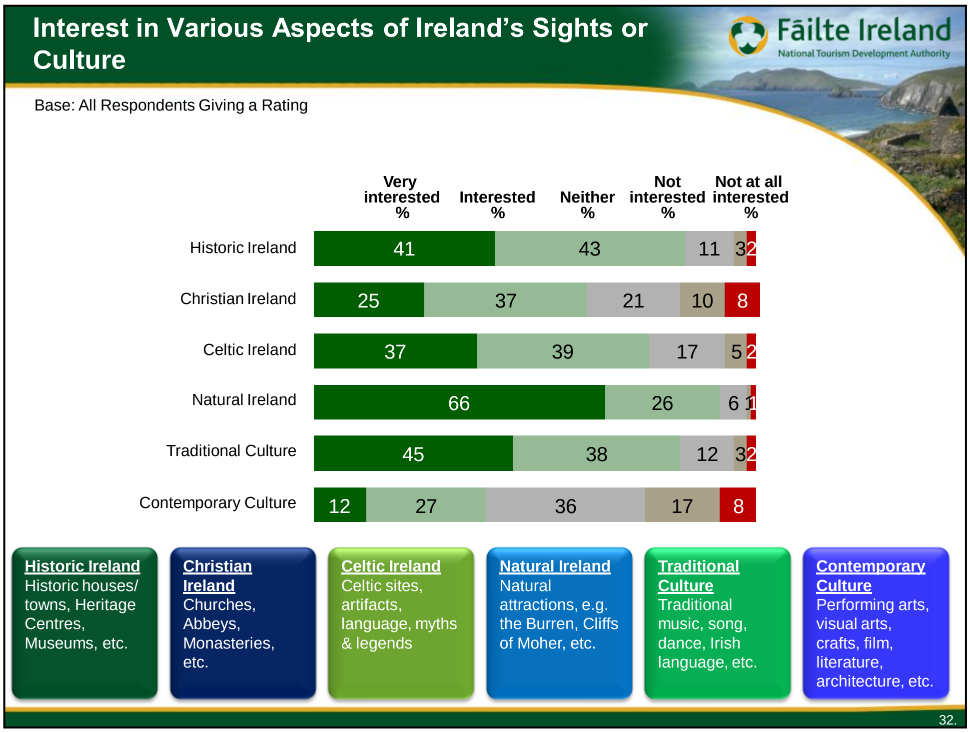
- ***Activities***

  Hiking/cross country walking is the premier product, mentioned more or less consistently by one in every four between 2006 and 2009, increasing to 31% in 2010. This is a particularly popular activity for Mainland Europeans, with 40% participating in 2010, up from 33% in 2009. Net satisfaction with the quality of this activity is very high at 94%. Reported participation in other activities, such as golf and cycling, is quite low (5% for each, as in 2009). While satisfaction with the quality of golf (95%) is virtually unanimous price is more of an issue, though less so than in 2009. In 2010 75% were satisfied, up from 59% in 2009 and fewer than one in ten were dissatisfied compared with 18% in the preceding year. Among the small minority (3%) participating in equestrian activities, satisfaction with quality (86%) is assured but remains more tenuous regarding price (68%).

Ireland's Sights and Culture

In a new question in 2010 holidaymakers were asked to rate their interest in different aspects of Ireland's sights and culture, including Historic, Christian, Celtic, Natural and Traditional and Contemporary culture.

Natural Ireland, incorporating natural and scenic attractions such as the Burren and the Cliffs of Moher, considerably outshone the other aspects measured in terms of the level of interest generated. Overall, two in three pronounced themselves **very interested** with virtually all others **interested**. This strong endorsement is hardly surprising, given the level of importance attached to scenic beauty.



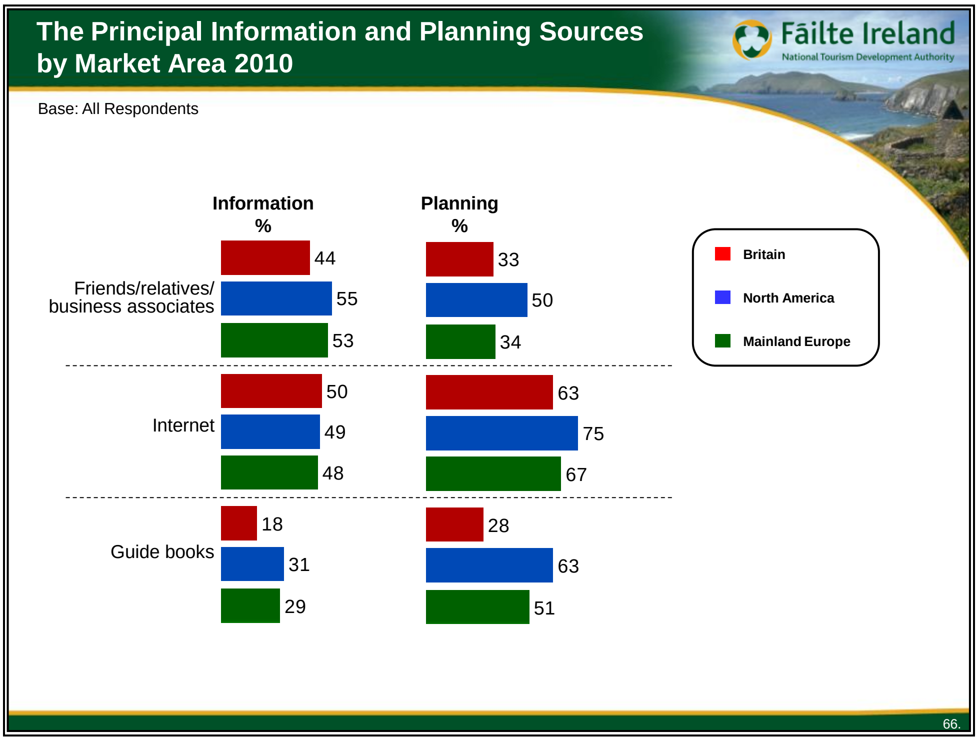
Traditional Culture drew the next strongest level of interest, closely followed by Historic Ireland. Our Christian heritage was of strong interest to one in four, with three in five overall expressing some level of interest. Contemporary Culture, incorporating performing and visual arts, film, literature, architecture, etc. appeared to have the least appeal with two in five interested to some extent, but one in four uninterested.

Across the markets North Americans showed the keenest interest in these various aspects, with the possible exception of Contemporary Culture.

Information & Planning

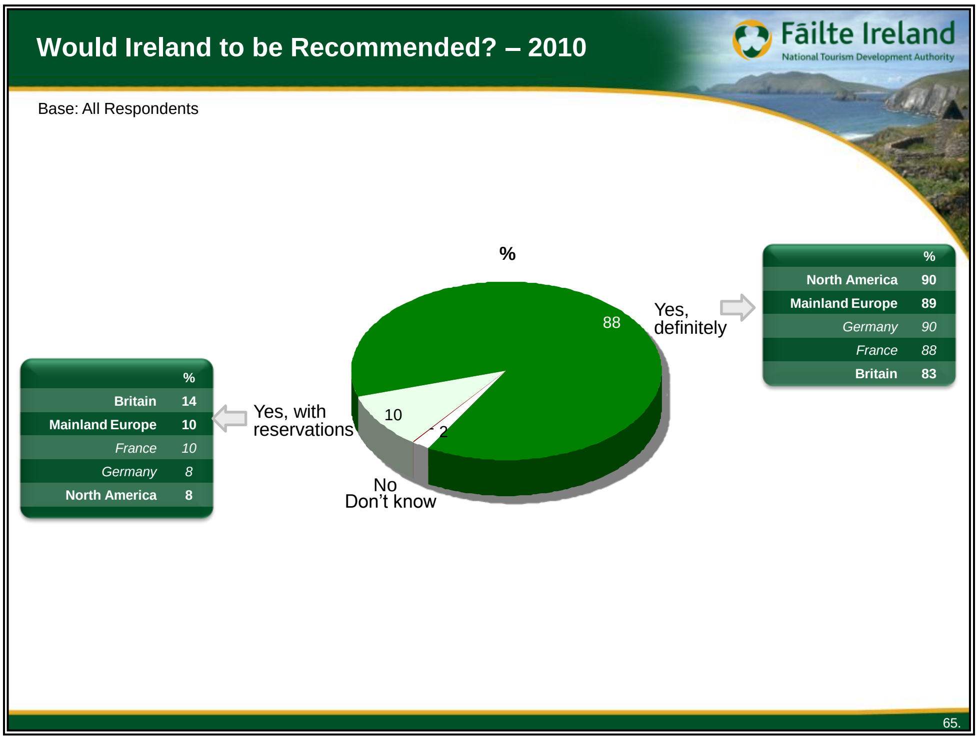
Personal recommendation continues to be the key factor with one in two visitors overall (52%) saying this influenced their choice of Ireland. Of almost parallel importance and identical to 2009, the Internet is mentioned by 48% of visitors as a factor in selecting Ireland and is now used by over two in every three (68%) in actually planning their holiday. Guide books continue to play an important role in destination choice, mentioned by 28% overall and particularly North American visitors (31%). Guide books are second to the Internet in terms of planning the holiday, mentioned by 50% of all visitors and a more substantial 63% of North Americans. One in every two Mainland European visitors (51%) use guide books for planning their trip. Irish Tourist Board literature maintains a steady performance as a motivator (13%), and as a planning aid (23%). Other brochures and promotional literature helped one in five (20%) make the choice and aided planning for more than one in four (27%).

The principal information and planning sources for the main market areas are shown below.



Would Ireland be Recommended?

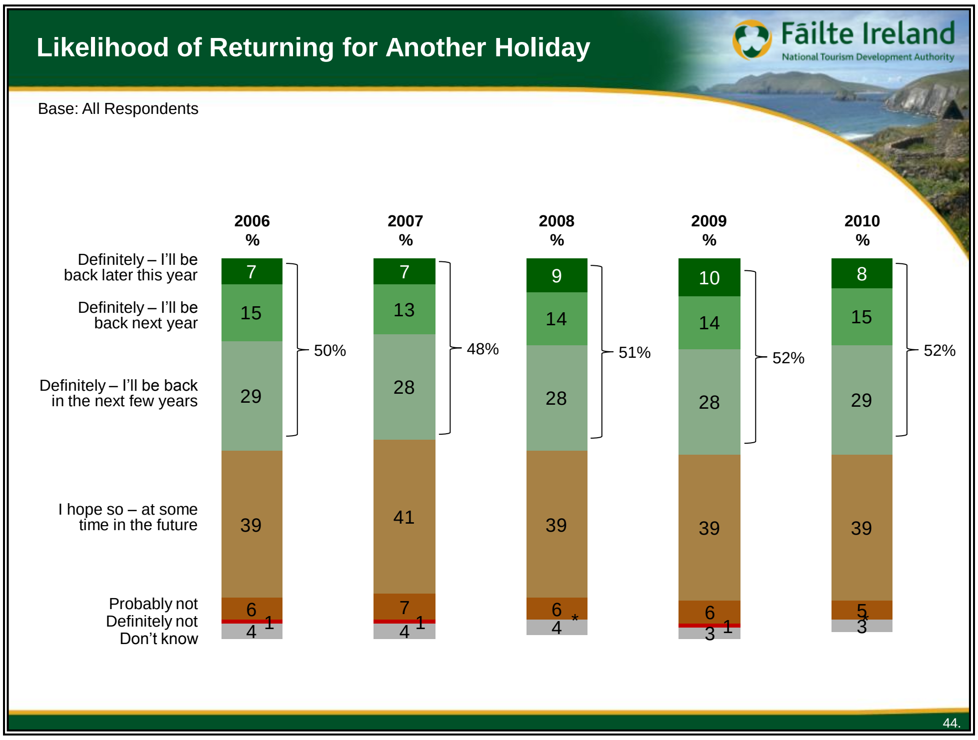
A key indicator of the success of the holiday is whether Ireland would be recommended to others as a holiday destination. Continuing the trend seen in previous years, the reported propensity to definitely recommend Ireland is very high and has peaked at 88% in 2010, the highest level in the past five years. Most others (10%) would recommend Ireland, but with some caveats.



Among the minority expressing reservations, the reasons for being more circumspect predictably reflect the concerns mentioned earlier, with high prices/cost of living the primary concern for this small group, followed by references to the weather. Roads, driving conditions and food and drink costs and quality were also mentioned as reasons for expressing reservations.

Would Visitors Come Back for Another Holiday?

Another measure of the success of the visit is the degree to which holidaymakers envisage returning for another visit. Results are very consistent from year to year. Over one in five (23%) anticipates coming back within the next year. Around half overall (52%) envisage a repeat visit in the next few years. While these represent substantial levels of endorsement, one would have to allow for the sense of well-being that accompanies a successful holiday, which may exaggerate the intention to return.

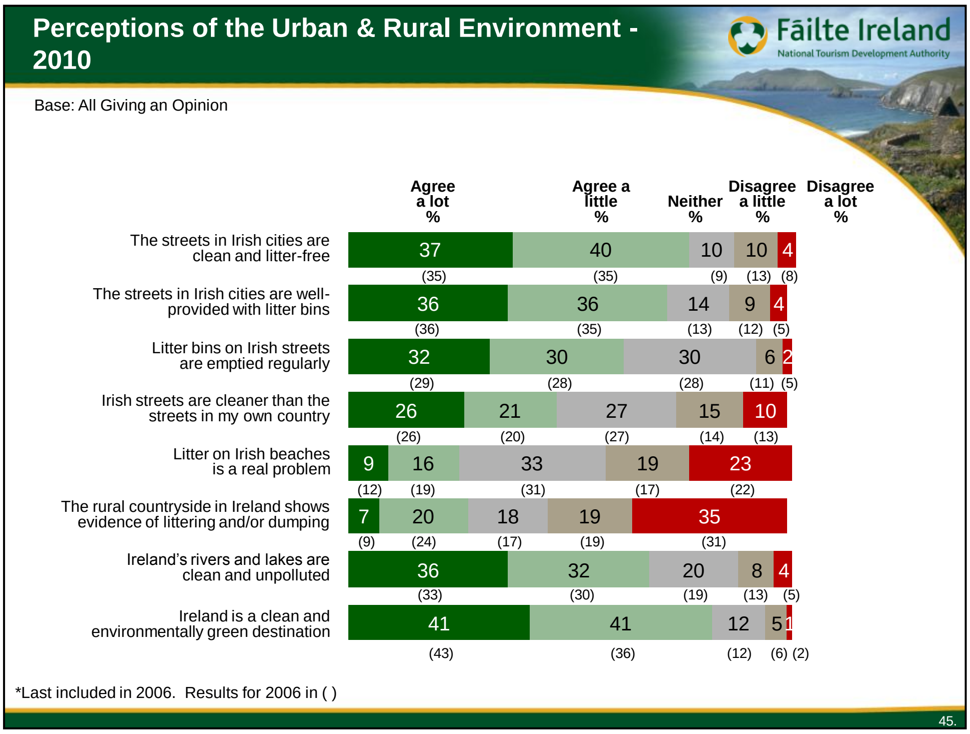


Unsurprisingly, given their proximity and ethnic connections, an imminent return is much more likely to be envisaged by British visitors, with 20% suggesting that they would definitely be back later in 2010 and a slightly higher 27% anticipating a return visit in 2011. North Americans are the most likely to express the hope that they will be back sometime in the future (49%).

Perceptions of the Urban and Rural Environment

In recent years, questions dealing with visitor attitudes on various environmental issues have been included on the Visitor Attitude Survey. To date, the issues covered have included litter and pollution (2006), water quality (2007), of more universal interest - carbon emissions and the environmental impact of travel (2008), and housing and the rural environment in 2009. In 2010, it was decided to revisit the issue of litter and pollution to see if attitudes had changed to any notable extent.

Holidaymakers were asked to what extent they agreed with the range of propositions regarding litter and pollution in the urban and rural environment shown in the chart below. Responses are shown for those who gave an opinion and exclude those who answered ‘don’t know’.



A degree of uncertainty about their own personal stance is evident among holidaymakers, characterised by an unwillingness to either agree or disagree with each proposition. This reaches its highest level relating to the statement *“litter on Irish beaches is a real problem”* with 33% undecided one way or the other. However, this may simply reflect a lack of actual experience rather than a degree of ambivalence.

Turning to the propositions that elicit the most defined opinions, there is quite a high level of agreement that *"the streets in Irish cities are clean and litter free",* 77% agreeing and just 14% disagreeing. Adding increased weight to this observation, the majority (72%) agree that *"Irish streets are well provided with litter bins"* although there is slightly less certainty that these are emptied regularly. Comparing the cleanliness of Irish streets to those of their own country, almost half agree to at least some extent that they are cleaner, but one in four disagree.

On the issue of littering and dumping in rural areas, 27% have noticed evidence of this though twice as many disavow that this is the case. There is an encouraging level of agreement (68%) that *'Ireland's rivers and lakes are clean and unpolluted'*, with just one in eight disagreeing.

A more stringent measure of our performance on environmental issues such as these is to focus on those who **agree a lot** with each proposition, leaving aside the response 'agree a little' which presupposes some element of doubt on the part of the respondent. On this measure, the picture is perhaps a little less rosy, with just one in three or slightly higher **strongly** in agreement with the various propositions regarding litter on Irish streets and just one in four **strongly** of the opinion that Irish streets are cleaner than those in their own country. On the negative aspects of litter on Irish beaches and evidence of littering and dumping in the rural countryside, fewer than one in ten are in strong agreement with these propositions and just 4% strongly dispute the statement that Ireland's rivers and lakes are clean an unpolluted.

Comparing these results to 2006, when these issues were last measured, it is encouraging to see a generally more positive reaction overall to the various elements measured. It should be noted, however, that Mainland Europeans, particularly German and French visitors, tend to be more circumspect in their reactions to these various factors.

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For further information see:

All Holidaymaker Trends 2006 – 2010
Main Markets 2010