



# **Tourism 2009:**

## **Some trends and Statistics**

# Information Sources that Influenced Choice of Ireland

Base: All Respondents

	2005 %	2006 %	2007 %	2008 %	2009 %
Friends/relatives/business associates	45	42	47	50	51
Internet	29	32	47	48	48
Guide books	18	18	29	28	24
Films	10	10	15	18	18
Other brochures/promotional literature on Ireland	20	18	20	19	17
Articles in newspapers/magazines	14	13	17	16	17
ITB literature	11	10	14	14	14
Travel Agent	6	7	11	15	13
Travel programme on TV/radio	10	8	12	14	12
Advertising for Ireland	8	8	11	11	10

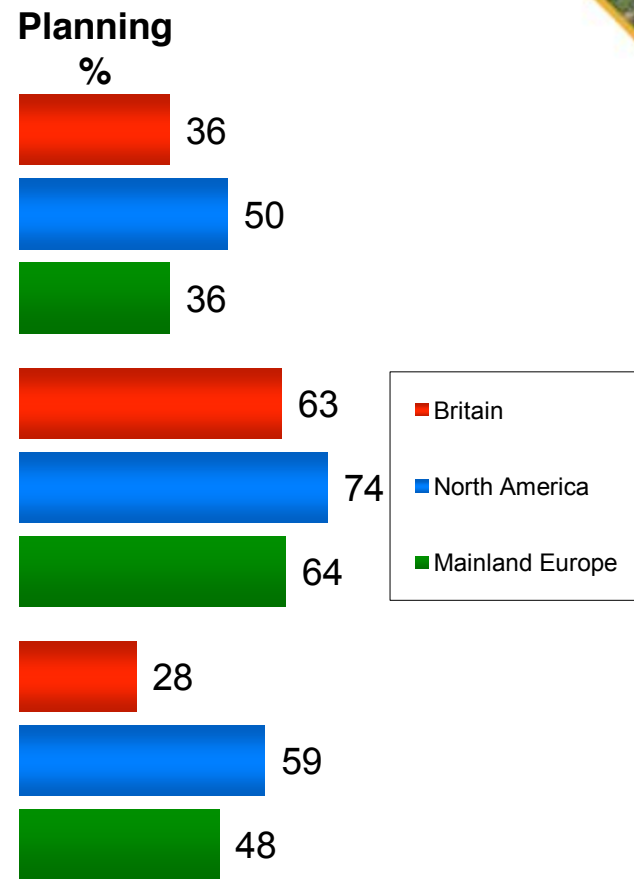
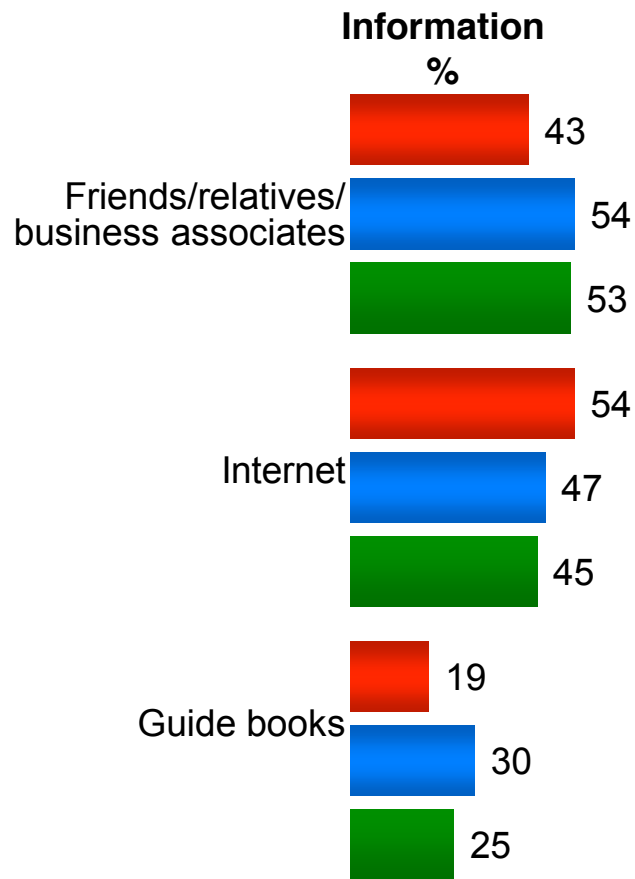
# Important Information Sources in Planning the Holiday in Ireland

Base: All Respondents

	2005 %	2006 %	2007 %	2008 %	2009 %
Internet	52	56	64	67	67
Guide books	41	40	48	47	46
Friends/relatives/business associates	29	29	37	39	40
Other brochures/promotional literature on Ireland	28	26	27	26	24
ITB literature	18	18	23	22	22
Travel Agent	16	17	20	22	21
Articles in newspapers/magazines	10	10	14	13	13

# The Principal Information and Planning Sources by Market Area 2009

Base: All Respondents



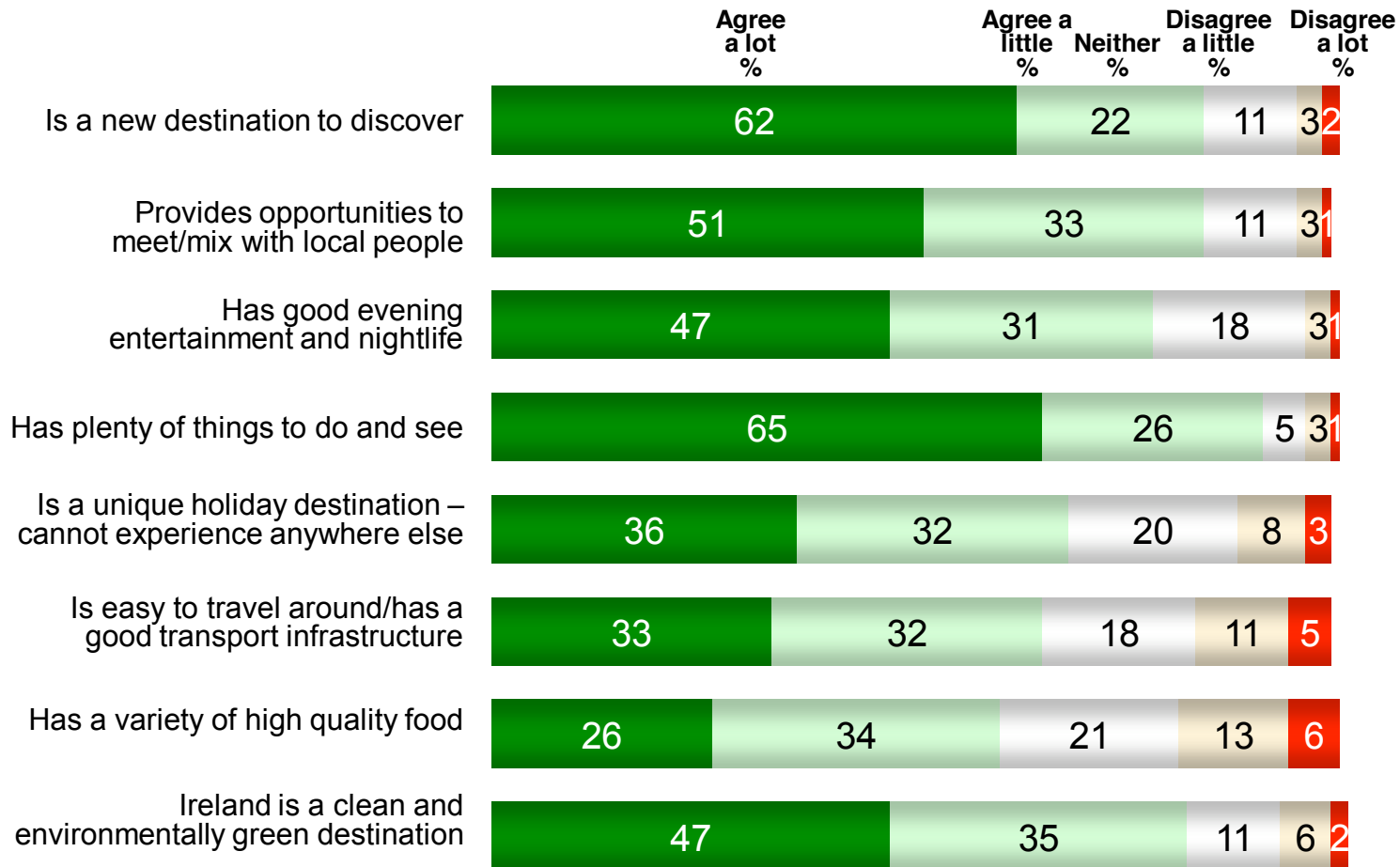
# Importance of Factors in Considering Ireland for a Holiday (I) – Very Important

Base: All Respondents Giving a Rating

	2005 %	2006 %	2007 %	2008 %	2009 %
Friendly, hospitable people	92	91	91	91	90
Beautiful scenery	90	90	89	88	89
Safe and secure destination	85	88	82	85	83
Plenty of things to see and do	n/a	n/a	80	82	82
Natural, unspoilt environment	86	85	83	80	80
Good range of natural attractions	n/a	85	80	80	80
Good all round value for money	71	72	69	71	75

# Agreement with Statements about Ireland – 2009

Base: All Respondents Giving an Opinion



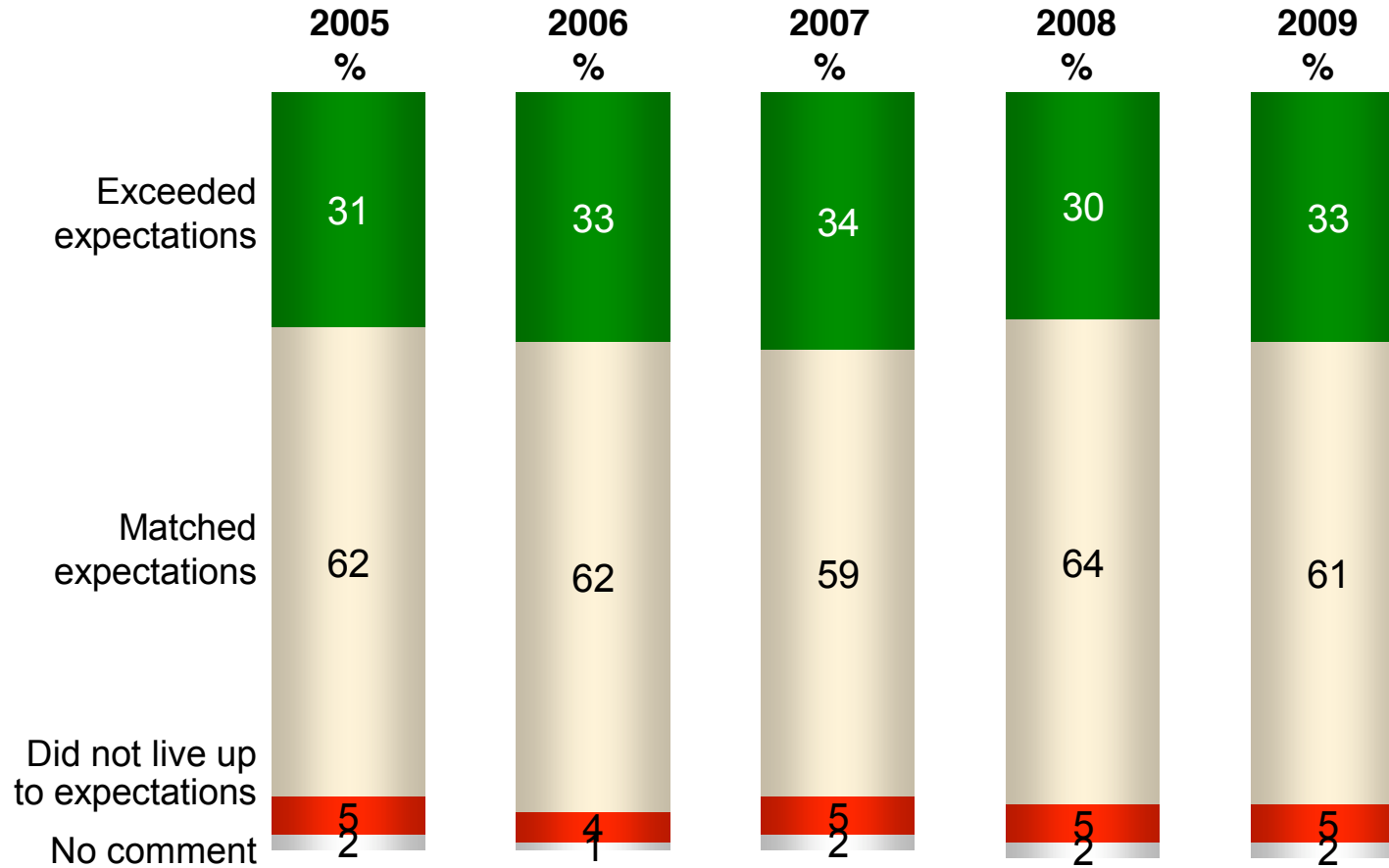
# Advantages – Most Frequently Mentioned

Base: All Respondents (Excludes Don't Know/No Opinion)

	2005	2006	2007	2008	2009
	%	%	%	%	%
The Irish people	39	39	38	39	40
The scenery	28	27	32	30	27
Culture/history	15	15	17	15	15
English speaking	14	15	11	12	10
Unspoilt environment	9	6	6	5	7
Restful/relaxing	10	8	5	5	7
Drinks/pubs	9	4	9	5	7

# Overall Opinion of their Irish Holiday

Base: All Respondents

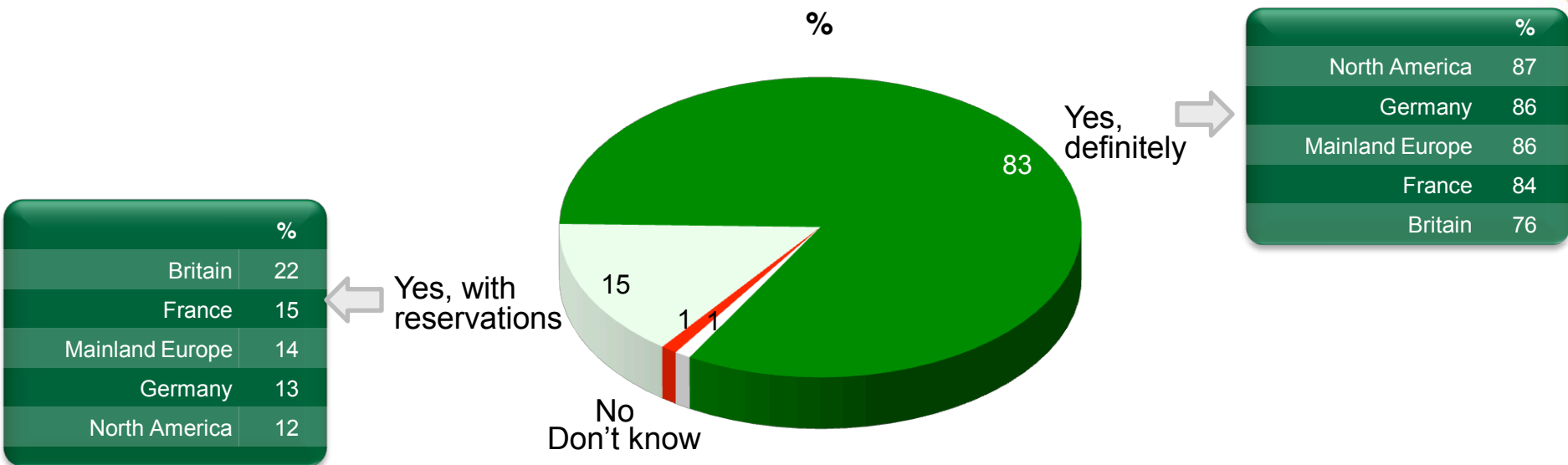


# Expectations Exceeded – The reasons why

	2007 %	2008 %	2009 %
<b>Expectations Exceeded</b>	34	30	<b>33</b>
<b>Why? – The Main Reasons</b>			
Irish People	40	42	<b>44</b>
Scenery	42	42	<b>41</b>
History/culture	9	9	<b>11</b>
Weather	7	6	<b>8</b>
Activities – something for all	4	3	<b>8</b>
Good internal transport	2	5	<b>7</b>
Well kept countryside/no litter/neat clean	2	4	<b>5</b>

# Would Ireland be Recommended? – 2009

Base: All Respondents

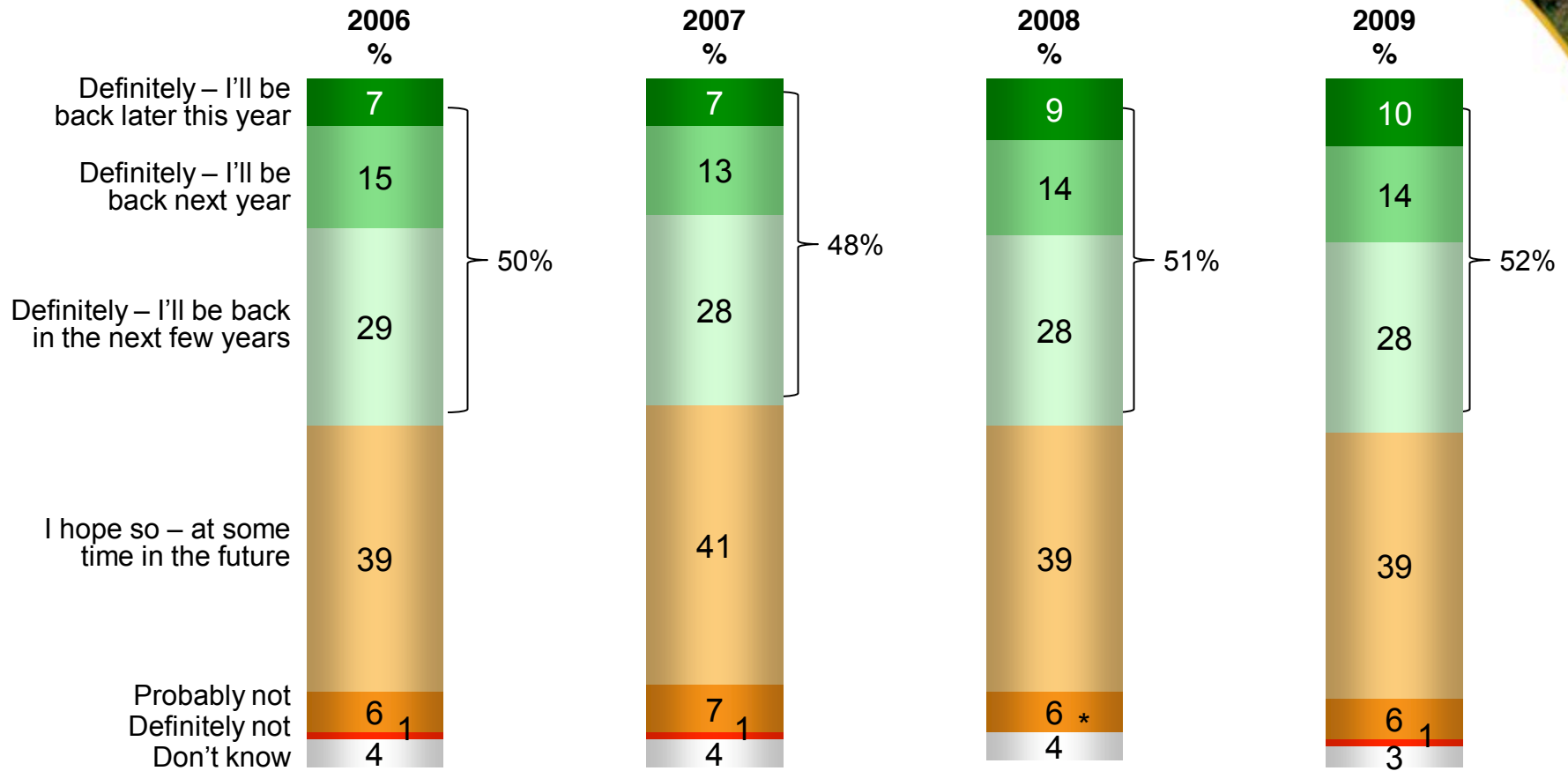


Base: All Respondents

	2005 %	2006 %	2007 %	2008 %	2009 %
Yes, definitely	79	78	79	81	<b>83</b>
Yes, with reservations	18	20	19	17	<b>15</b>
No	1	1	2	1	<b>1</b>
Don't know	2	2	1	1	<b>1</b>
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Why with reservations?					
High prices	30	33	29	42	<b>37</b>
Weather	10	10	15	16	<b>13</b>
Food/drink – high costs/poor quality	6	6	1	5	<b>7</b>
Roads/driving	14	11	14	8	<b>6</b>
Dissatisfied with accommodation	6	7	6	4	<b>5</b>

# Likelihood of Returning for Another Holiday

Base: All Respondents



# Ireland's Advantages vis-à-vis Other Destinations

Base: All Respondents

## Advantage Spontaneously Identified

### All Holidaymakers

%

Irish people 40

Scenery 27

Culture/history 15

English speaking 10

Restful/relaxing 7

Unspoilt environment 7

Drink/pubs 7

Britain	%
Irish People	41
Scenery	14
Easy to get to	12
English speaking	11
Culture/history	9
Restful/relaxing	8
Driving/roads	5

Mainland Europe	%
Irish People	40
Scenery	32
Culture/history	13
Unspoilt environment	11
Drink/pubs	9
Restful/relaxing	8
English speaking	6

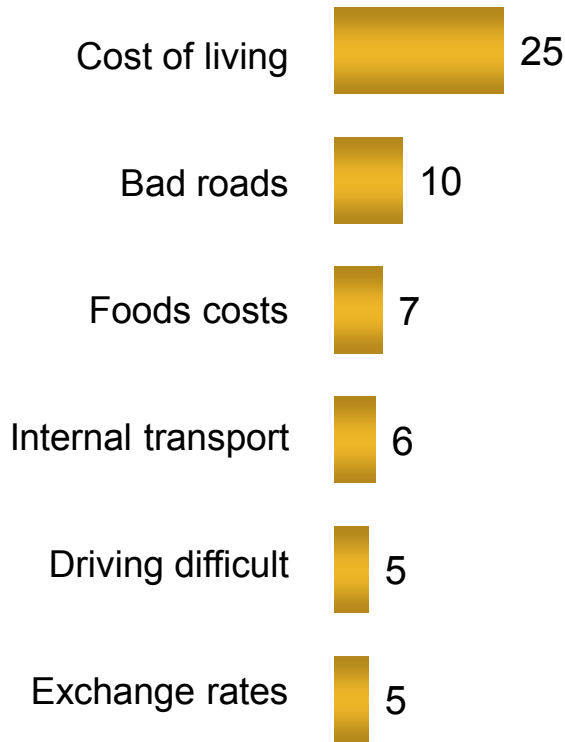
North America	%
Irish people	40
Scenery	31
Culture/history	22
English speaking	14
Ancestry/genealogy	8
Drink/pubs	7

# Ireland's Disadvantages vis-à-vis Other Destinations

Base: All Respondents

## Disadvantages Spontaneously Identified

### All Holidaymakers %



Britain %	
Cost of living	41
Poor exchange rate	11
Food costs	9
Bad roads	6
Internal transport	5
Drink costs	5

Mainland Europe %	
Cost of living	20
Bad roads	12
Food costs	7
Internal transport	7
Driving difficult	6
Food quality	6

North America %	
Cost of living	16
Bad roads	13
Driving difficult	7
Food costs	7
Internal transport	6
Poor exchange rate	5

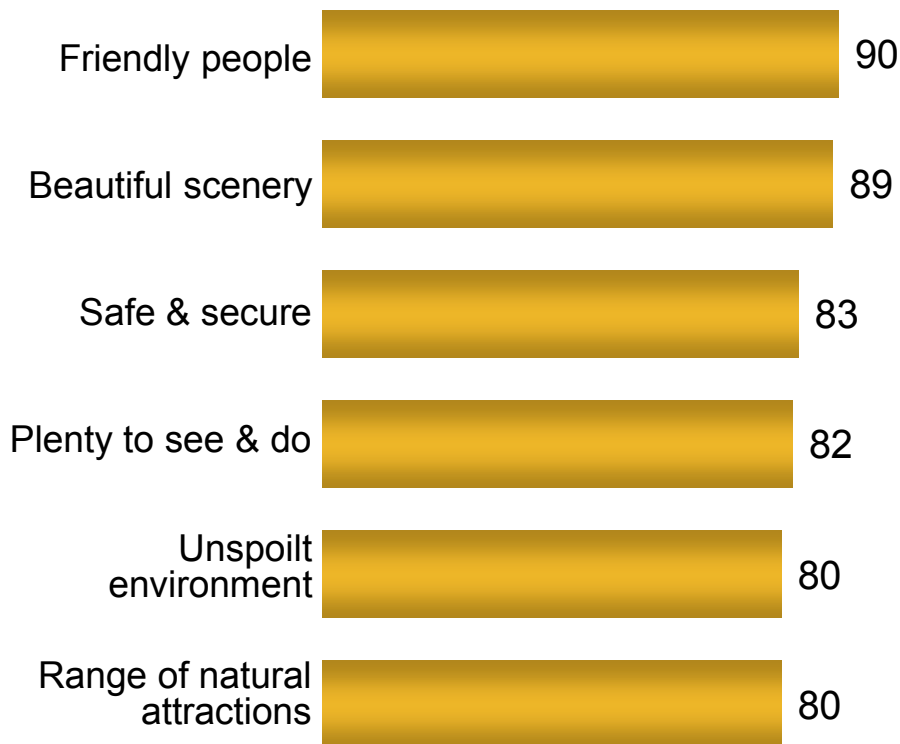
# What Were the Top Destination Issues

Base: All Respondents

## Important in Considering Ireland – Top Box Scores 2009\*

### All Holidaymakers

%



Britain	%
Friendly people	90
Value for money	84
Safe & secure	84
Competitively priced access	84
Plenty to see and do	81
Beautiful scenery	79

Mainland Europe	%
Beautiful scenery	90
Friendly people	88
Unspoilt environment	83
Range of natural attractions	80
Plenty to see and do	76
Safe & secure	76

North America	%
Beautiful scenery	94
History & culture	94
Friendly people	92
Plenty to see & do	92
Safe & secure	92
Suitable for touring	86

\*Rated very important (5) or important (4) on five point scale

# What Earned the Highest Satisfaction?

Base: All Respondents

## Rating of Experience – Top Box Scores 2009\*

### All Holidaymakers %



Britain	%
Friendly people	94
Beautiful scenery	92
Easy to get to	89
Relaxed pace	88
Safe & secure	87
Unspoilt environment	83

Mainland Europe	%
Beautiful scenery	95
Friendly people	92
Nature, wildlife/flora	88
Unspoilt environment	87
Safe & secure	87
Relaxed pace	85

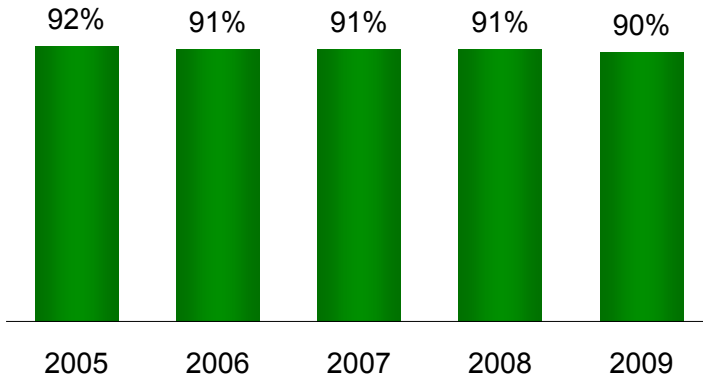
North America	%
Beautiful scenery	98
Friendly people	96
Culture/history	95
Safe & secure	95
Range of natural attractions	91
Unspoilt environment	91

\*Rated very important (5) or important (4) on five point scale

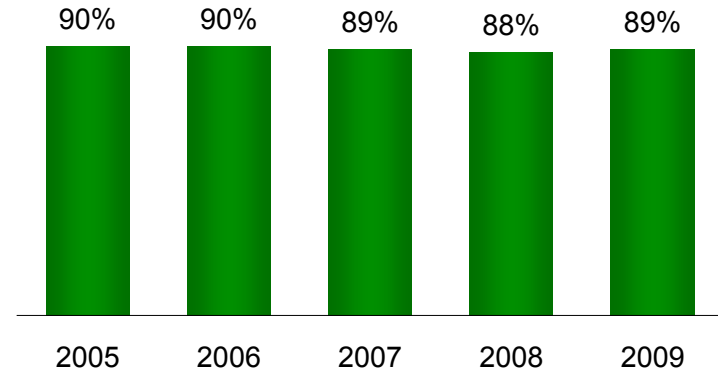
# Ireland's Unique Selling Points and Their Importance as Destination Features

Base: All Respondents – Top Box Scores\*

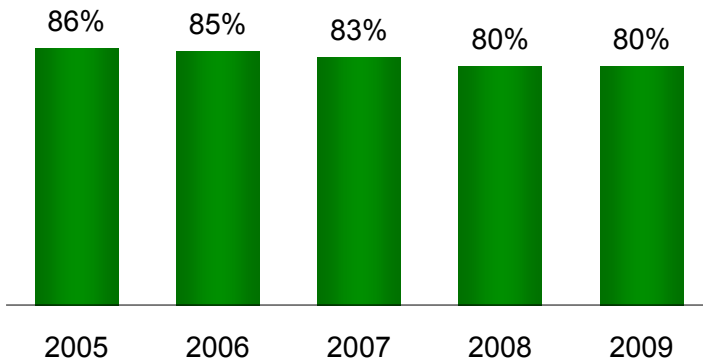
## Friendly, Hospitable People



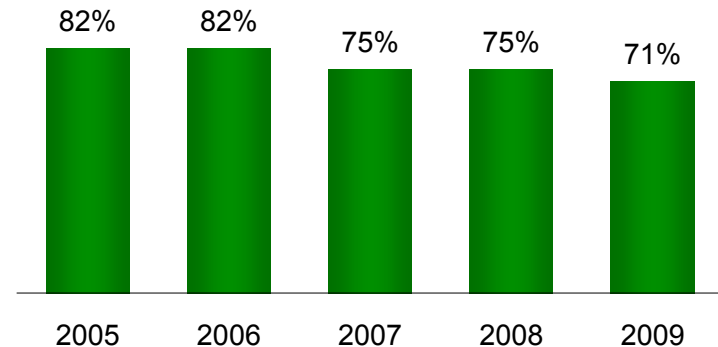
## Beautiful Scenery



## Natural, Unspoilt Environment



## Easy and Relaxed Pace of Life



\*Rated very important (5) or important (4) on five point scale