VISITOR ATTITUDES SURVEY 2008

EXECUTIVE SUMMARY

Fáilte Ireland
National Tourism Development Authority

Visitor Attitudes Survey 2008
Executive Summary

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 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 planning the trip.
6. Examine attitudes to the environmental impact of holiday travel.

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 all 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 in their mother tongue, and a covering letter from Fáilte Ireland, outlining the purpose of the survey and thanking them for their co-operation. 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 2008.
- Successful placements: 12,578 questionnaires.
- Successful returns: 5,683 questionnaires, a response rate of 45%.

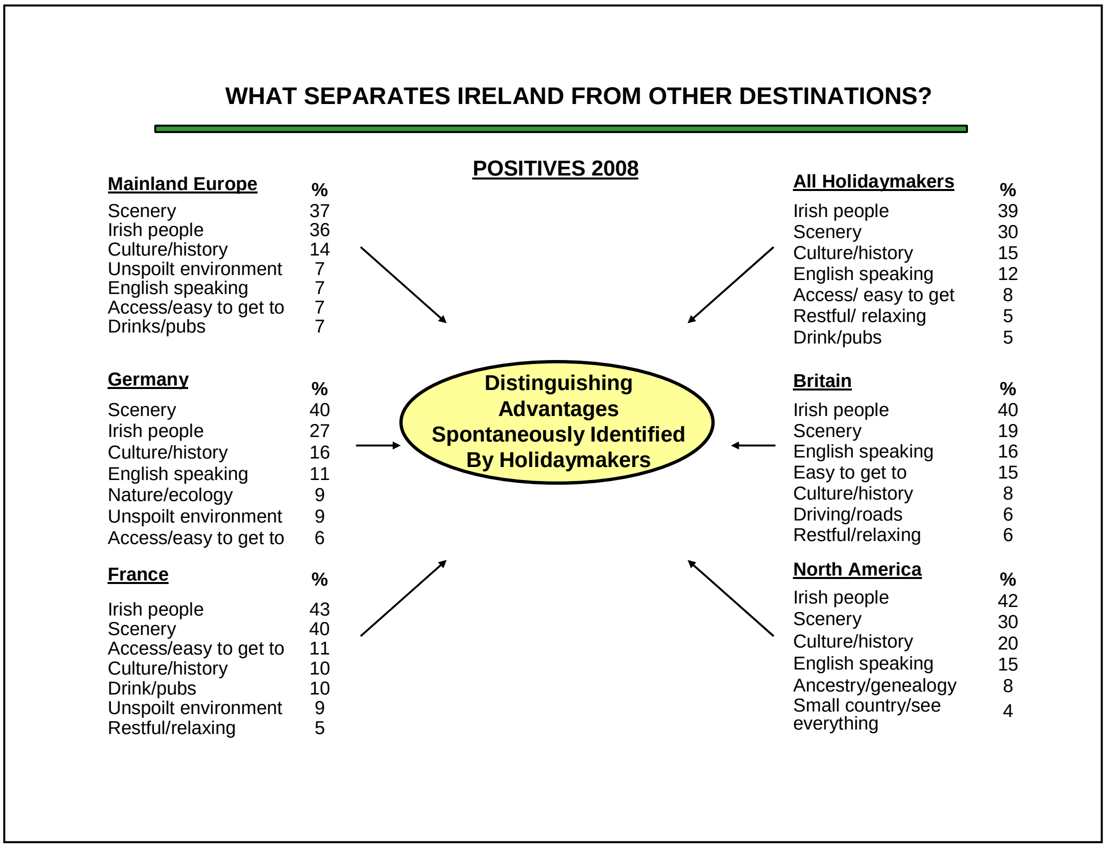
Note: In a self-completion survey, representativeness of the respondent sample cannot be assured. In the case of the Visitor Attitudes Survey, the demographic profile and characteristics of respondents differ from the total non-Irish born holidaymaker profile in that respondents tend to be older and 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 2008

The beauty of the scenery and friendliness and hospitality of the Irish people continue to be the most prominent, **spontaneously** mentioned positive discriminators for Ireland compared with other holiday destinations.

Other distinguishing advantages **spontaneously** identified by visitors are our cultural and historical heritage and, for particular nationalities, the fact that we are English speaking.

Over the years, these always have been the distinguishing factors associated with Ireland. Mention of the Irish people as a distinguishing advantage has declined somewhat since the start of the decade, but at an overall level it still ranks as the top feature, ahead of our scenic attractions.



In the main markets, British and North American holidaymakers give particular weight to the Irish people, placing this discriminator well ahead of scenery. Among Mainland Europeans, the outcome is more measured, with almost equal proportions selecting scenery and the Irish people, though within the two main European markets, France and Germany, different shades of opinion emerge. For German holidaymakers, scenery is the definitive leader, whereas for the French, the choice is much more equitable with the Irish people just slightly ahead of scenery as a positive discriminator.

Focusing on the top five discriminators, Irish pub culture has disappeared off the list in 2008 across all the main markets with the exception of France.

Destination Determinants and their Importance in Choosing Ireland

From a wide range of factors that might influence the choice of a holiday destination, the most important in choosing Ireland are friendliness, scenery, an unspoilt environment, safety and security, the range of natural attractions, and things to do and see. Interesting history and culture, the anticipation of a new destination to discover and the prospect of a relaxed pace of life also rate highly.

While these factors generally comprise the fundamental influences in choosing Ireland, as the chart below shows, there are some market divergences, reflecting both the mindset and the practical requirements of particular nationalities. Thus, the suitability of the country for a touring holiday features strongly for North Americans who tend to take in as much as possible of the country during their visit. Value for money features high up the agenda of British holidaymakers, while the range of natural attractions and the prospect of an unspoilt environment have a particular resonance for Mainland European visitors.

WHAT WERE THE TOP DESTINATION ISSUES IN 2008?

Scoring 8, 9 or 10 out of 10 as important in considering Ireland

All Holidaymakers	%
Friendly people	81
Beautiful scenery	79
Safe & secure	74
Unspoilt environment	70
Plenty to see & do	67
Range of natural attractions	66

Britain	%
Friendly people	81
Safe & secure	78
Value for money	72
Beautiful scenery	68
Plenty to see & do	67
Relaxed pace	65

North America	%
Friendly people	87
Beautiful scenery	87
Safe & secure	84
History & culture	82
Plenty to see & do	77
Suitable for touring	76

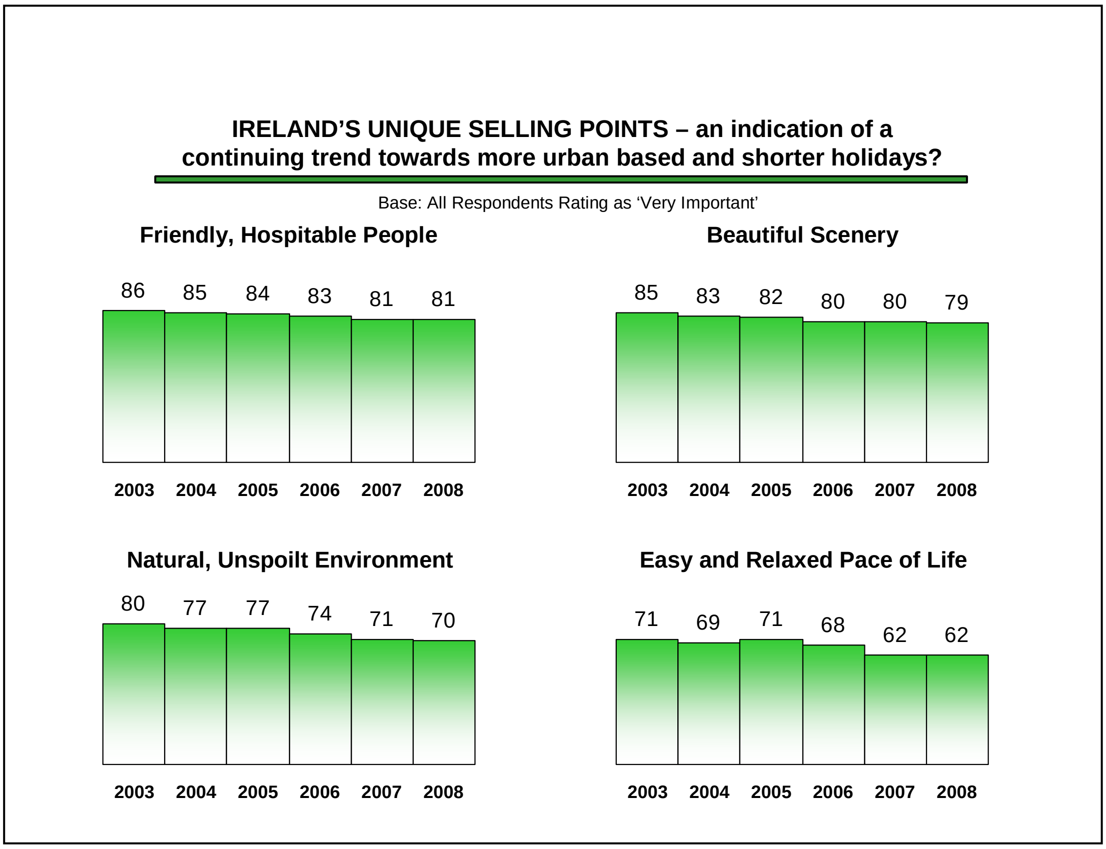
France	%
Beautiful scenery	86
Unspoilt environment	74
Friendly people	70
Range of natural attractions	66
New destination to discover	62
Plenty to see & do	60

Germany	%
Beautiful scenery	89
Friendly people	81
Unspoilt environment	79
Range of natural attractions	75
Plenty to see & do	66
Safe & secure	63

Mainland Europe	%
Beautiful scenery	85
Friendly people	77
Unspoilt environment	74
Range of natural attractions	70
Safe & secure	63
Plenty to see & do	61

Although the principal factors taken into account in considering Ireland are very consistent from year to year, there are some indications of slow erosion in the importance of some of these in recent years. A trend towards more urban based trips and shorter stays is likely to have contributed to this gradual diminishment in importance. In 2008, for example, around one in five holidaymakers (19%) described their holiday in Ireland as a city break, with Dublin the primary focus of such trips. The proportion describing their holiday as predominantly countryside declined for the second year in succession, down to 34% from 37% in 2007 and 41% in 2006.

Despite the seemingly changing nature of holidaymakers to Ireland, the support and reinforcement of destination features such as friendly, hospitable people, beautiful scenery, an unspoilt environment and a relaxed pace of life continue to be an imperative in discriminating Ireland from other similar destinations.



Key Areas of Satisfaction

Ireland's main attractions are highly rated, with the majority of holidaymakers very satisfied with those features identified as the top ranking motivations for choosing to holiday here. Across the main markets, beautiful scenery and the friendliness and hospitality of the Irish people receive consistently high satisfaction ratings. Nature, wildlife and flora have a particular resonance with Mainland European visitors, particularly those from Germany. The relaxed pace earns a higher satisfaction score among North Americans and British than other nationalities. North Americans give a particularly high satisfaction score for interesting history and culture, a gratifying result in light of the strong importance they attach to this as a destination feature.

WHAT EARNED THE HIGHEST SATISFACTION IN 2008?

Scoring 8, 9 or 10 out of 10 as satisfied with these aspects of Ireland

All Holidaymakers	%
Beautiful scenery	89
Friendly people	87
Safe & secure	80
Unspoilt environment	79
Nature, wildlife, flora	77
Relaxed pace	77

Britain	%
Friendly people	87
Beautiful scenery	82
Relaxed pace	78
Safe & secure	76
Easy to get to	76
Unspoilt environment	73

North America	%
Beautiful scenery	94
Friendly people	91
Culture/history	90
Safe & secure	88
Range of natural attractions	87
Unspoilt environment	86

France	%
Beautiful scenery	88
Nature, wildlife, flora	85
Friendly people	79
Safe & secure	78
Relaxed pace	76
Unspoilt environment	74

Mainland Europe	%
Beautiful scenery	90
Friendly people	85
Nature, wildlife, flora	85
Unspoilt environment	79
Safe & secure	78
Range of natural attractions	75

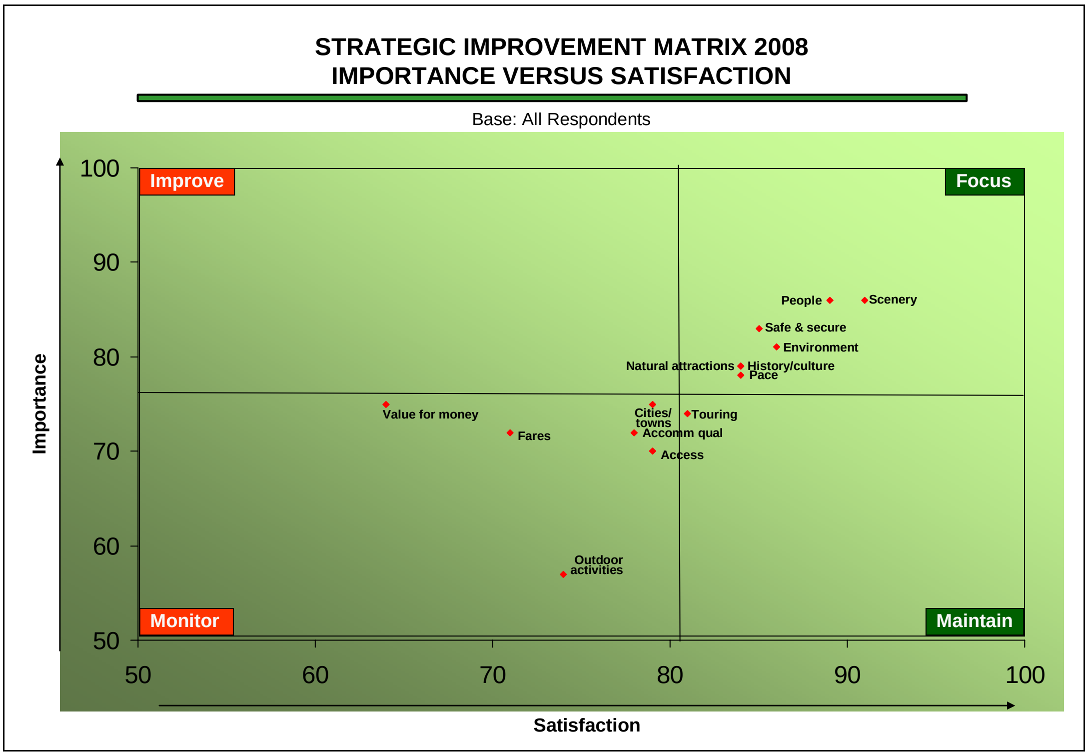
Germany	%
Beautiful scenery	93
Friendly people	89
Nature, wildlife, flora	88
Unspoilt environment	83
Range of natural attractions	78
Safe & secure	75

The positives and negatives of the Irish holiday experience, evidenced by high levels of satisfaction (*70% or higher very satisfied*) or dissatisfaction (*10% or higher dissatisfied*) with a range of destination determinants, are summarised overleaf. This shows that Ireland continues to deliver a strong performance on a range of important destination features. However, the challenge will be to maintain these high levels of satisfaction in the face of ongoing concerns regarding value for money, particularly as securing good value is likely to be a much more pressing prerogative for many holidaymakers in the current economic climate.

Positives	Negatives
✓ Beautiful scenery (89%) ✓ Friendly & hospitable people (87%) ✓ Unspoilt environment (79%) ✓ Safe & secure (80%) ✓ Nature, wildlife, flora (77%) ✓ Easy, relaxed pace of life (77%) ✓ Interesting history & culture (74%) ✓ Good range of natural attractions (76%)	X Good all round value for money (17%) X Litter free/pollution free (10%)

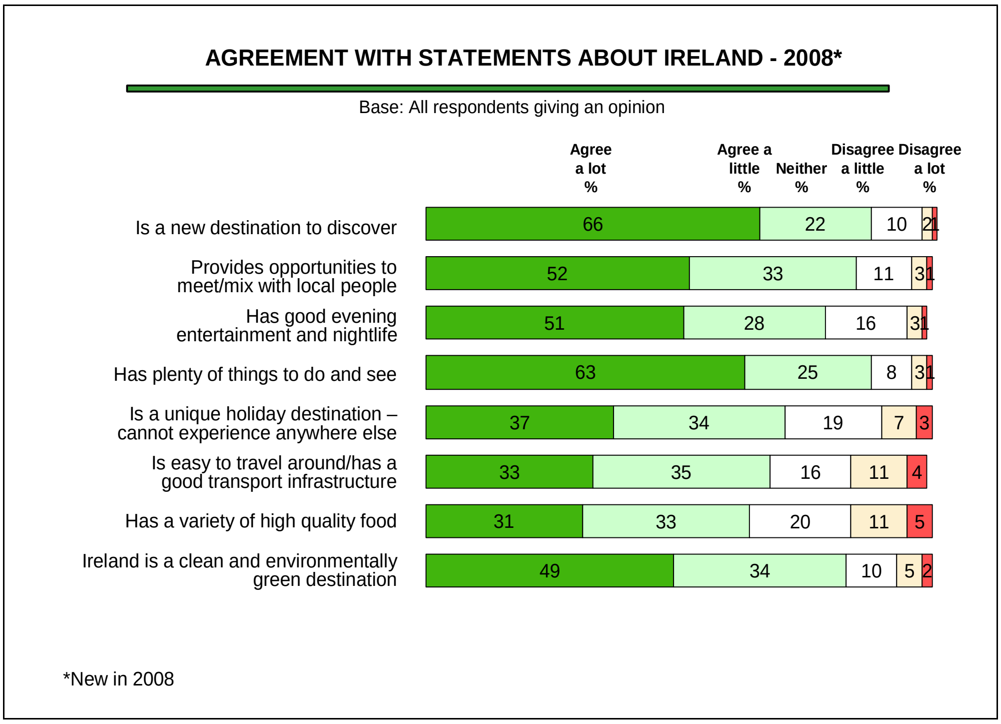
Matching satisfaction to the importance attached to the various attributes that go to make up the Irish holiday experience shows where promotional efforts are best directed and performance needs to be enhanced. This clearly indicates that Ireland performs well on its principal Unique Selling Points (USPs) and demonstrates the importance of continuing to focus promotional efforts on those strengths that differentiate us from other holiday destinations.

Some factors have a lower level of importance in choosing Ireland. While performing relatively well, they still fall short of the very high levels of satisfaction noted for our primary USPs. Examples are value for money, cost and ease of access, attractive cities and towns, good quality accommodation and outdoor activities. These may not be strong determinants in choosing Ireland, but they form an important part of the holiday, have the potential for negative word of mouth if perceived to be unsatisfactory, and so merit consistent monitoring in order to enhance the overall holiday experience.



Results for 2008 again show that Ireland continues to deliver holidays that match (64%) or exceed (30%) holidaymakers' expectations. By continuing to **focus** on those factors that are the quintessential elements of the Irish holiday, at the same time as **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.

In a new question in 2008, holidaymakers were asked, based on their experiences during their stay, whether they agreed or disagreed with a series of propositions regarding Ireland as a holiday destination. 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, and entertainment and variety of activities and experiences. The following chart, which shows the reactions of those who responded to each of these factors suggests a largely positive outlook, with the majority agreeing either strongly or a little with each of the propositions.



However, while the findings reinforce the general perceptions of Ireland as a holiday destination, it would be unwise to be too complacent about our advantages vis-à-vis other destinations. Focusing on the highest level of endorsement (those **agreeing a lot** with each proposition) the findings indicate that for some dimensions reaction is perhaps more circumspect. For example, with the benefit of their experiences just over one in three (37%) **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), as many as one in five are non-committal on this issue. This suggests that a marketing approach predicated substantially on Ireland's uniqueness as a destination could be somewhat precarious since the reality might prove to be less than the expectation, with the potential for 'bad press' from those who might be disappointed. At a more practical level, just one in three respectively strongly endorse the variety of high quality food (32%) and our transport infrastructure (33%), with these latter aspects drawing the highest level of disagreement (15 – 16%) among the various propositions measured.

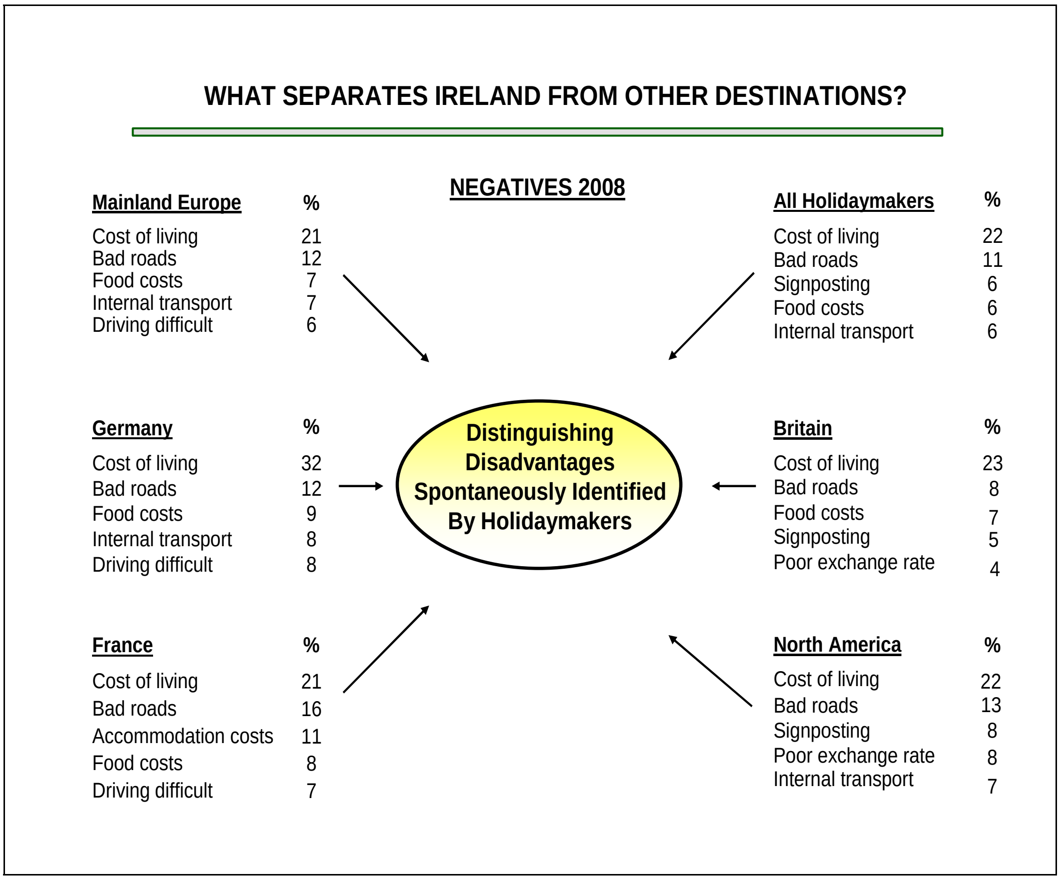
Over the past three years, holidaymakers have been asked to comment on Ireland as a clean and environmentally green destination, with results very consistent in this time span. With the constantly growing emphasis worldwide on environmental issues and a green agenda, it is encouraging to see that Ireland continues to perform quite well in this regard in the eyes of our visitors. In 2008, one in two (49%) agreed strongly that Ireland is a clean and environmentally green destination, slightly ahead of results for 2007 (44% agreeing strongly) and 2006 (43%). Disagreement with this statement has remained low each year, with fewer than one in ten adopting a negative stance and most others agreeing a little with the proposition.

Some Persistent Areas of Concern

Expense/value for money

The chart overleaf shows that the cost of living in Ireland is a continuing disadvantage relative to other similar destinations, and is even more widely mentioned at an overall level in 2008 than in the preceding year (22% versus 18% in 2007). Although good all round value for money is not in the first rank in considering Ireland for a holiday (mentioned as very important by 58%), satisfaction with this aspect is not particularly strong (with just 35% describing themselves as very satisfied, down from 40% in 2007). Furthermore, as seen in the negatives outlined earlier, value for money is the factor drawing the highest dissatisfaction rating (17%). It is no surprise then that the cost of living consistently receives the highest level of **spontaneous** mention (22%) as a disadvantage. For British and North American holidaymakers, value for money perceptions are compounded by poor exchange rates. Though not in the mainstream of disadvantages identified, it is worth noting the growing emphasis on this factor among North Americans (spontaneously mentioned by 8% in 2008 compared with 5% two years ago) and British holidaymakers (at 4% in 2008 versus 1% two years ago). A further indication of negative perceptions of value/cost of living is the extent to which food costs surface as a spontaneous disadvantage.

Other perennial issues are bad roads and poor signposting. It is encouraging, however, to see a continuing fall-off in the proportions spontaneously mentioning ‘bad roads’ as a disadvantage (down from 17% in 2007 to 11% in 2008). 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. While results for 2008 suggest that these are becoming less problematical issues, it remains to be seen whether negative observations will continue to diminish in 2009 and beyond.



Products & Services

Holidaymakers were asked how satisfied they were with the quality, customer service and price of the various products and services they had used during their holiday. The key findings are shown below.

Paid Serviced Accommodation: Top grade hotels and Irish Homes/Guesthouses achieve quite high satisfaction ratings on quality and customer service, with little movement in ratings over the years. Medium and other grade hotels receive more modest satisfaction ratings on quality and customer service, suggesting that standards do not always reach customer expectations. For each of these categories of accommodation, satisfaction with price has deteriorated slightly since 2007 and, indeed, for top grade hotels and Irish Homes/Guesthouses is at its lowest level over the past seven years.

Self-catering Accommodation: Both rented self-catering and hostels enjoyed improved satisfaction ratings since 2007 across all three measures, with self-catering accommodation reverting to the higher levels of satisfaction seen in the earlier years of the decade, and hostels receiving their highest satisfaction rating with quality and price since 2002. Results for the caravan and camping sector were less positive however, with deterioration in satisfaction across all three measures since 2007, reaching its lowest level in this time series.

Food Services: Historically, price has tended to be an issue across the range of food outlets and this trend continues in 2008, with satisfaction with price at its lowest level for almost all categories of food outlets in the past six years. Across the range of outlets, consistent with previous years satisfaction with quality is highest for high quality restaurants (71% very satisfied) and lowest in the budget restaurant sector (40% very satisfied). Measured for the second time in 2008, 39% of consumers are dissatisfied with the price of alcohol, a substantial increase on the 27% noted in 2007.

Internal Transport: Quality and customer service are rated more positively than price across each form of transport but with just under two in every three very satisfied with the quality of bus and train services and car hire and taxis, there is clearly room for improvement. On price, the highest dissatisfaction rating was noted for car hire (19%), taxis (15%) and intercity bus services (12%). Overnight coach tours consistently receive the highest level of approbation on quality, customer service and price, indicating a commendable performance overall.

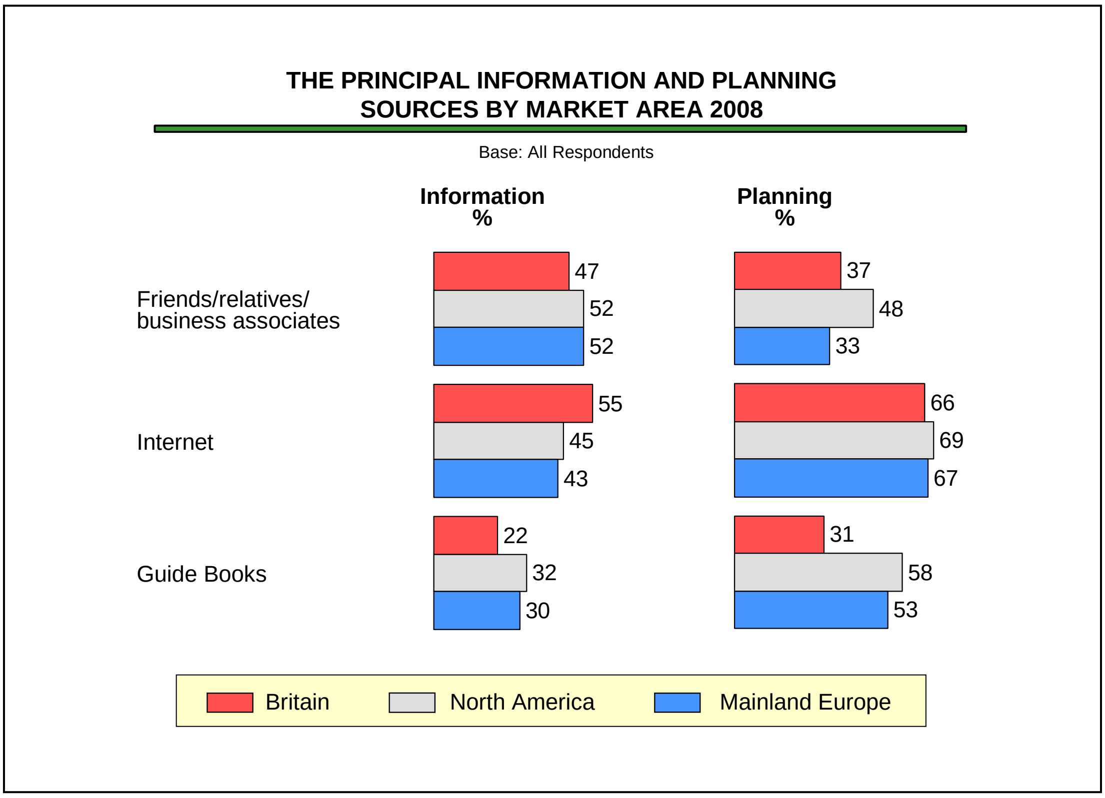
Historical & Cultural Attractions: Covering historic houses and castles, monuments and historic sites, gardens, heritage/interpretative centres and museums and art galleries, these constitute an important feature of the holiday, with two in every three (68%) visiting any of these attractions. Their range and quality is generally well rated, but price tends to be less favourably regarded, with lower satisfaction levels all round regarding admission charges.

Activities: Hiking/cross country walking is the premier product, mentioned by one in every four as an activity they have taken part in during their holiday, rising to one in every three among Mainland Europeans. Satisfaction with the quality and price of this activity is generally high. Reported participation in other activities, such as golf and cycling, is quite low (6% for each). While satisfaction with the quality of golf is very strong (albeit at 79% slightly down from the high level of 87% noted in 2007), a much lower satisfaction level with price (39%), with a substantial 17% dissatisfied suggests that this could be negative issue in expanding participation.

Information & Planning

Personal recommendation remains the key factor with one in two visitors saying this influenced their choice of Ireland. Of almost parallel importance, the Internet is mentioned by 48% of visitors as a factor in selecting Ireland and is now used by two in every three (67%) in actually planning their holiday. Guide books continue to play an important role in destination choice (particularly for North American visitors) and are second to the Internet in terms of planning the holiday. ITB literature maintains a steady performance as a motivator (14%), and as a planning aid (22%). Other brochures and promotional literature helped one in five make the choice and aided planning for over one quarter.

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

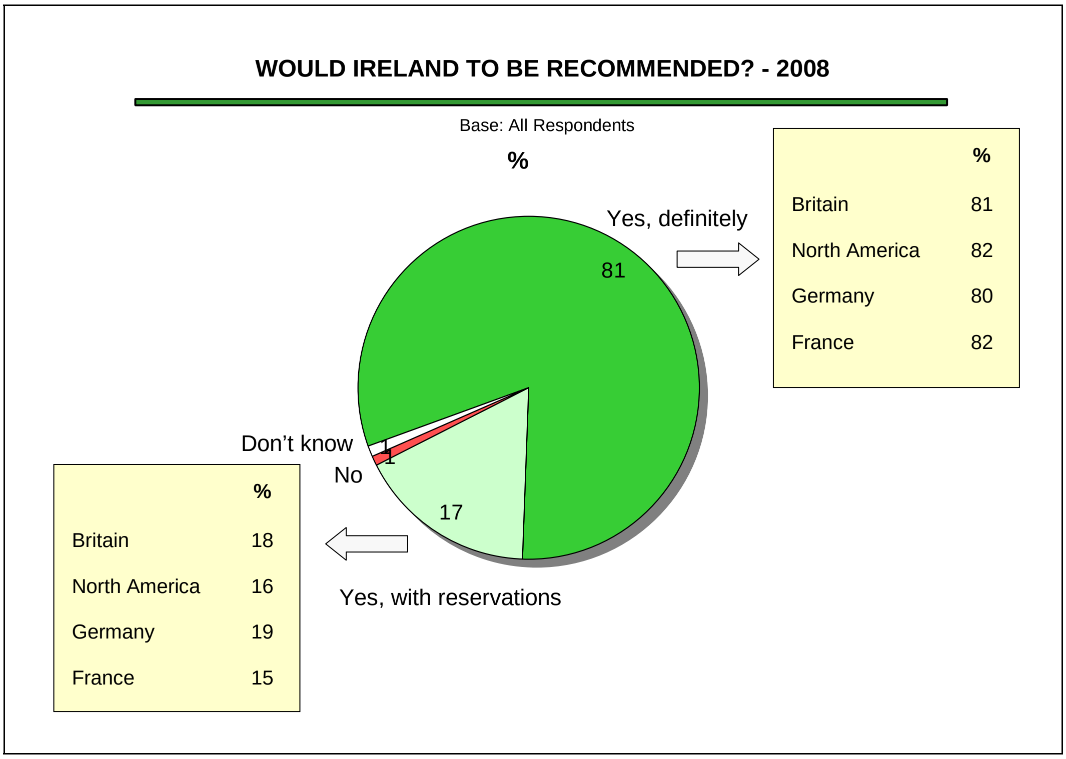


Would Ireland be Recommended?

A key indicator of the success of the holiday is whether it would be recommended to others. As in previous years, the propensity to recommend Ireland remains at a high level with over eight in every ten saying they would do so unreservedly. Almost all others (17%) would recommend Ireland, but with some caveats.

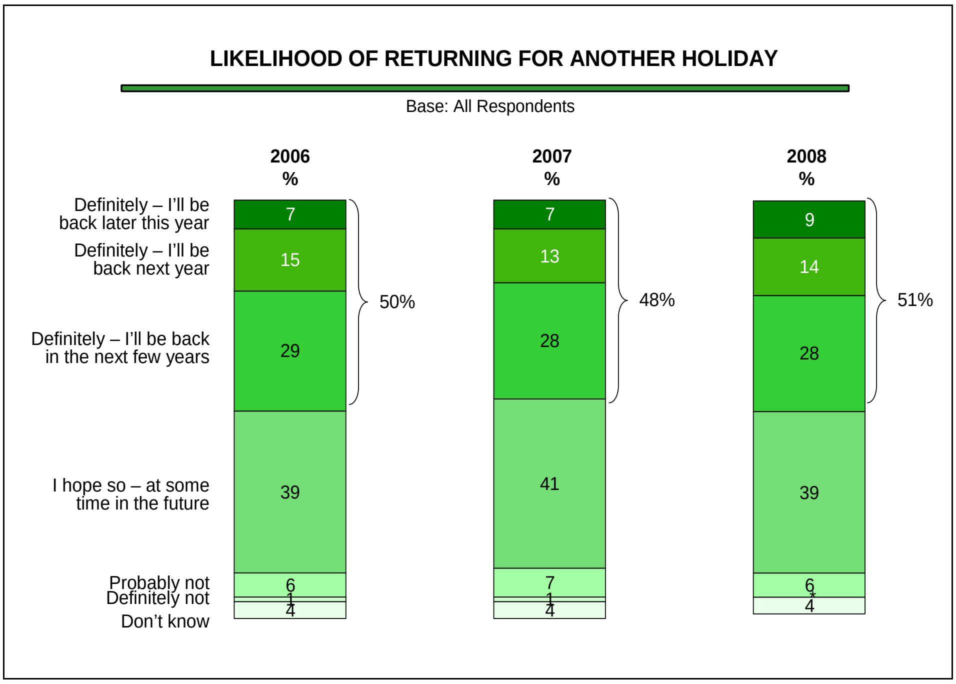
Their reasons for being more circumspect reflect the concerns mentioned earlier, particularly in relation to high prices/cost of living, with 42% now citing this as a reason for their reservations compared with 29% in 2007.

While inevitably the weather remains a perennial problem, mentioned by 15% as a disincentive, it is encouraging to see a fall-off in the proportions mentioning roads and driving conditions as a deterrent to a whole-hearted recommendation (down to 8% from 14% in 2007 and at its lowest level in the past six years).



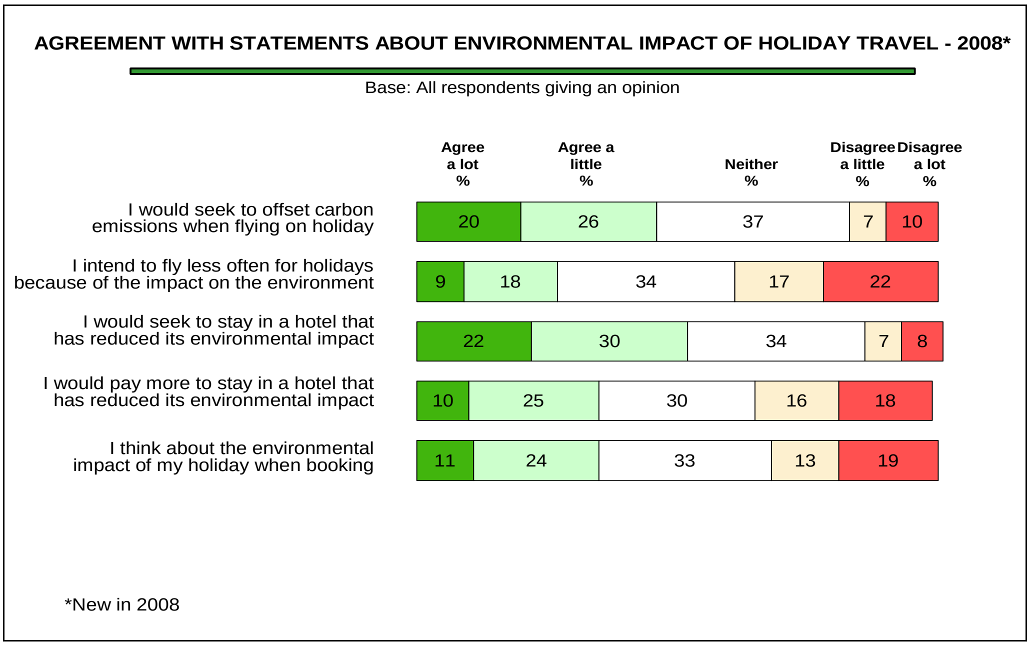
Would Visitors Come Back for Another Holiday?

Another measure of the success of the visit is the degree to which holidaymakers envisage returning for another bite at the cherry. One in five anticipates coming back within the next year. Around half overall envisage coming back 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.



The Environmental Impact of Holiday Travel

A new question was included in 2008 in an attempt to gauge reactions to the current preoccupations with carbon emissions and the environmental impact of travel. Holidaymakers were asked to what extent they agreed with the range of propositions shown in the chart below. Responses are shown for those who gave an opinion, and exclude those who answered 'don't know' (ranging from 8% to 13% across the various statements).



It is notable that around one in every three (ranging from 30% to 37%) could neither agree nor disagree with each of the propositions, suggesting that while they may be conscious of the various issues involved, there is a substantial degree of uncertainty or ambivalence about their own personal stance on each.

There is perhaps an intriguing dissonance in reactions to the first two statements, with approaching half (46%) agreeing to some extent that they would seek to offset carbon emissions when flying on holidays, but almost as many (39%) disagreeing with the proposition *'I intend to fly less often for holidays because of the impact on the environment'*. What is not clear, of course, is the extent to which the choice between long haul and short haul destinations might be perceived to be a positive response to reducing carbon emissions.

While over half agree to some extent that they would seek to stay in a hotel that has reduced its environmental impact, enthusiasm wanes with the prospect of paying more for such a choice, with agreement down to 35% and an almost identical proportion (34%) disagreeing. Finally, almost as many disagree as agree that *'they think about the environmental impact of their holiday when booking'*.

The net result of these reactions suggests that while consciousness of the environmental impact of holiday travel is clearly in evidence, the extent to which holidaymakers are prepared to factor it into to their holiday plans and choices is still very much open to debate.

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For further information see:

- All Holidaymaker Trends 2002 – 2008
- Key Charts 2008
- Main Markets 2008