



Fáilte Ireland

National Tourism Development Authority

Visitor Attitudes Survey Main Markets 2010



MillwardBrown
Lansdowne

Type of Holiday



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Base: All Respondents

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
City Break	13	19	6	17	12	12	6
Predominantly city/urban based	8	6	10	7	6	7	6
Predominantly countryside	33	53	25	31	36	35	24
City/Urban & Countryside	45	21	59	44	46	46	63
Dublin	90	78	94	95	84	97	*
Cork	10	16	15	6	15	6	
Galway	7	3	9	7	14	7	
Limerick	4	3	10	4	9	7	
Other City	4	3	6	4	14	9	

* Base too small for analysis

Information Sources that Influenced Choice of Ireland

Base: All Respondents

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Friends/relatives/business associates	52	44	55	53	54	49	55
Internet	48	50	49	48	46	40	37
Guide books	28	18	31	29	29	32	33
Films	20	9	24	22	17	23	19
Other brochures/promotional literature on Ireland	20	18	18	20	14	20	30
Articles in newspapers/magazines	17	14	14	20	15	22	20
Travel Agent/ Tour Operator	15	9	19	13	13	13	20
Travel programme on TV/radio	14	9	13	17	16	21	19
Irish Tourist Board literature	13	15	10	14	14	13	16
Advertising for Ireland	11	12	9	12	18	10	16

Important Information Sources in Planning the Holiday in Ireland

Base: All Respondents

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Internet	68	63	75	67	62	63	59
Guide books	50	28	63	51	53	58	41
Friends/relatives/business associates	40	33	50	34	30	33	49
Other brochures/promotional literature on Ireland	27	20	30	26	15	28	40
Travel Agent/ Tour Operator	24	10	32	22	25	25	37
Irish Tourist Board literature	23	22	23	23	21	25	22
Articles in newspapers/magazines	14	10	16	15	9	17	18

Internet Sites Accessed for Choosing Holiday

Base: All Using Internet for Choosing Holiday

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
www.tourismireland.com	24	17	19	32	37	20	16
www.discoverireland.com	36	37	30	40	35	32	39
User generated content from sites such as blogs or trip advisor	37	32	34	40	38	36	50

Internet Sites Accessed for Planning Holiday



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Base: All Using Internet for Planning Holiday

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
www.tourismireland.com	26	17	26	30	28	23	24
www.discoverireland.com	45	38	48	46	37	44	40
User generated content from sites such as blogs or trip advisor	42	35	47	40	46	35	55

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

Base: All Respondents Giving a Rating

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
<u>Friendliness/Hospitality/Pace of Life</u>							
Friendly, hospitable people	92	92	95	89	89	90	94
Easy, relaxed pace of life	74	79	76	71	72	72	69
<u>Environment</u>							
Beautiful scenery	91	82	96	92	93	94	91
Natural, unspoilt environment	84	79	86	85	90	88	84
Good range of natural attractions	82	71	87	82	83	85	87
Attractive cities/towns	74	68	85	68	62	62	79
<u>Value/price</u>							
Good all round value for money	74	82	85	62	58	61	83
Reasonably priced accommodation	73	77	84	61	63	58	81
Competitively priced air and sea fares	67	81	76	54	63	51	61

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

Base: All Respondents Giving a Rating

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
<u>Products and Other Destination Features</u>							
Safe and secure destination	85	85	94	76	70	76	91
Plenty of things to see and do	85	81	92	81	77	84	86
Interesting history/culture	80	74	91	73	66	75	86
A new destination to discover	75	59	84	74	70	72	80
Good range of historical/cultural attractions	73	64	87	65	54	69	78
Suitable for touring	72	63	89	62	56	60	87
Easy to travel around the country/ good transport infrastructure	72	70	85	61	51	62	86
Range of good quality accommodation	68	74	82	53	48	51	74
Opportunity to meet/mix with local people	65	59	70	63	61	62	68
Easy to get to	65	80	67	56	63	48	64
A variety of high quality food	57	74	71	37	32	34	74
Good evening entertainment/nightlife	40	42	45	35	36	30	46
Opportunities for outdoor activities	38	41	39	37	36	36	38
Festivals and cultural events	30	35	33	24	26	21	33

Rating of Ireland on Destination Issues (I)

– Very Satisfied

Base: All Respondents Giving a Rating

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
<u>Friendliness/Hospitality/Pace of Life</u>							
Friendly, hospitable people	95	95	97	94	93	94	96
Easy, relaxed pace of life	88	92	92	84	88	84	91
<u>Environment</u>							
Beautiful scenery	96	95	99	96	96	98	94
Natural, unspoilt environment	90	89	95	87	87	88	91
Good range of natural attractions	88	83	93	86	89	90	89
Nature/wildlife/flora	88	79	91	90	91	94	83
Attractive cities/towns	82	76	93	78	76	76	84
Litter free/pollution free	71	68	80	65	66	58	73
<u>Value/price</u>							
Competitively priced air and sea fares	66	68	74	58	69	53	73
Good all round value for money	56	50	75	44	46	35	63

Rating of Ireland on Destination Issues (II)

– Very Satisfied

Base: All Respondents Giving a Rating

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
<u>Products and Other Destination Features</u>							
Safe and secure destination	90	87	97	87	90	85	94
Interesting history/culture	87	83	95	81	79	85	93
Suitable for touring	82	78	92	75	78	69	88
Easy to get to	79	84	87	71	85	63	81
Range of good quality accommodation	78	78	91	66	77	64	84
Opportunities for outdoor activities	61	62	66	58	69	56	61

Rating of Ireland on Destination Issues – Dissatisfied

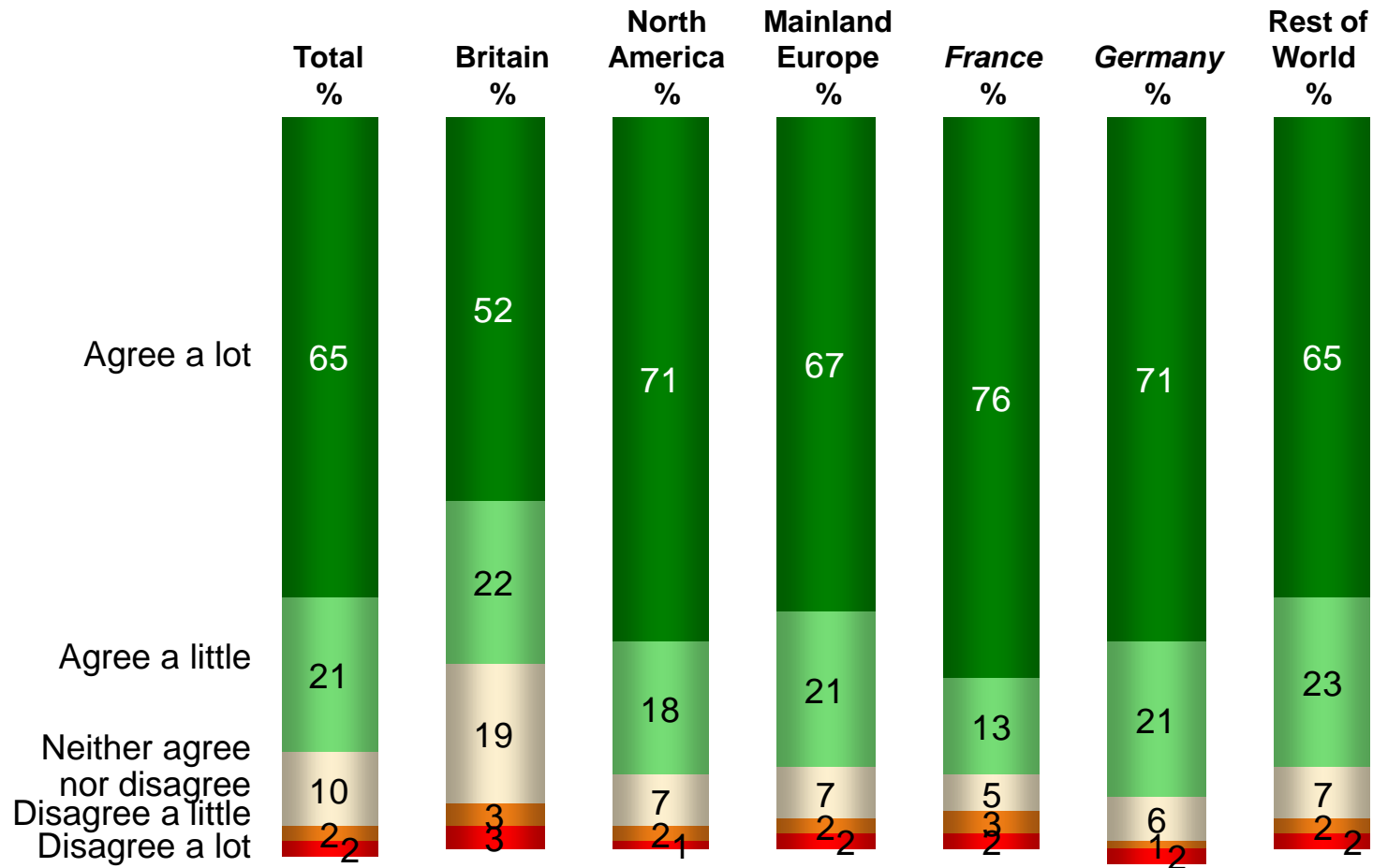
Base: All Respondents Giving a Rating

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Good all round value for money	13	23	7	14	14	21	11
Litter free/pollution free	8	8	4	11	10	15	10
Competitively priced air and sea fares	8	12	7	8	3	10	5
Easy to get to	5	3	2	7	2	11	3
Opportunities for outdoor activities	4	4	2	7	9	6	3
Country suitable for touring	3	3	1	4	3	3	3
Range of good quality accommodation	2	2	1	4	3	5	1
Attractive cities and towns	2	4	*	3	4	3	6

Agreement With Statements About Ireland

Base: All Giving an Opinion

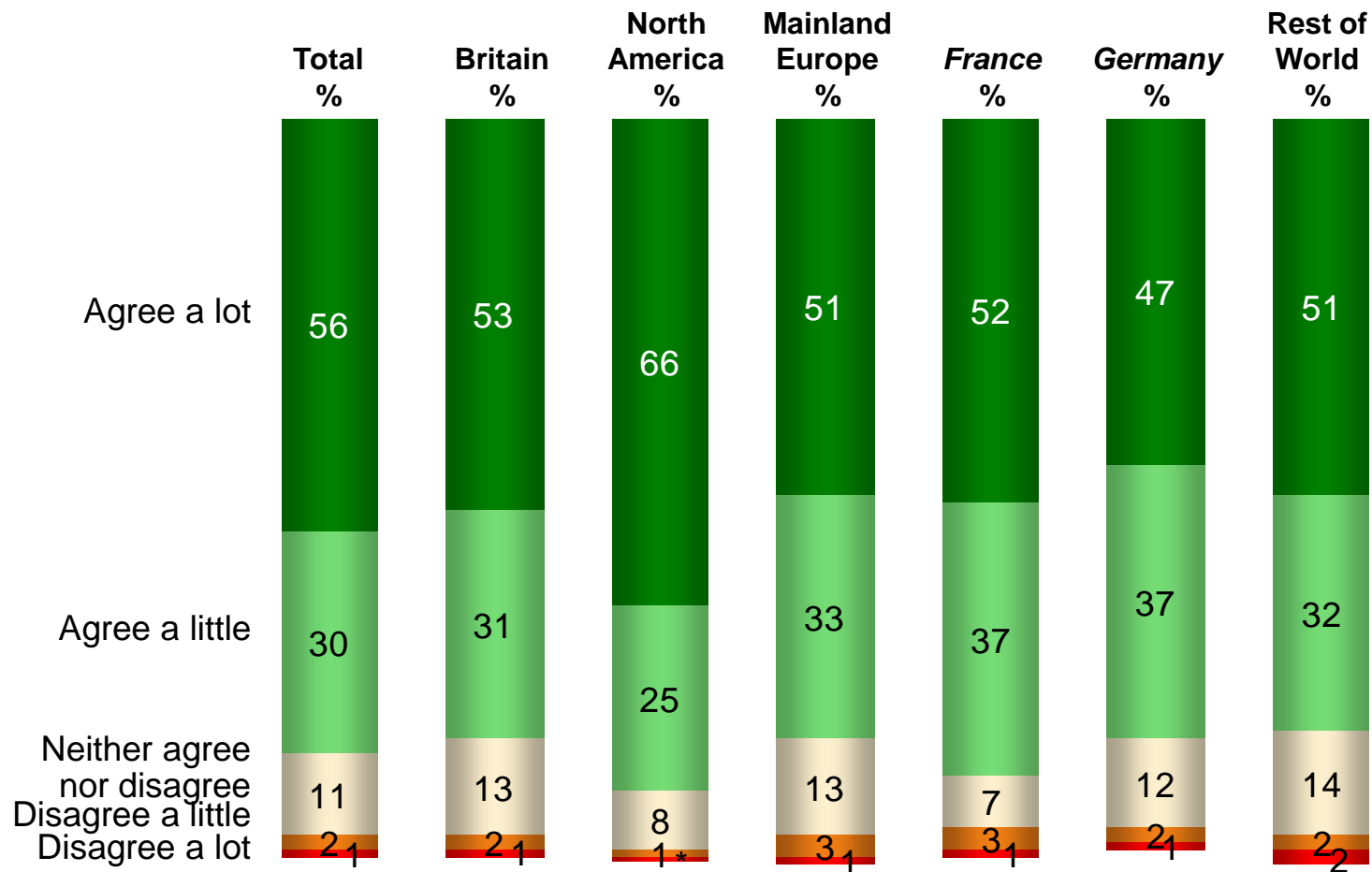
'Is a new destination to discover'



Agreement With Statements About Ireland

Base: All Giving an Opinion

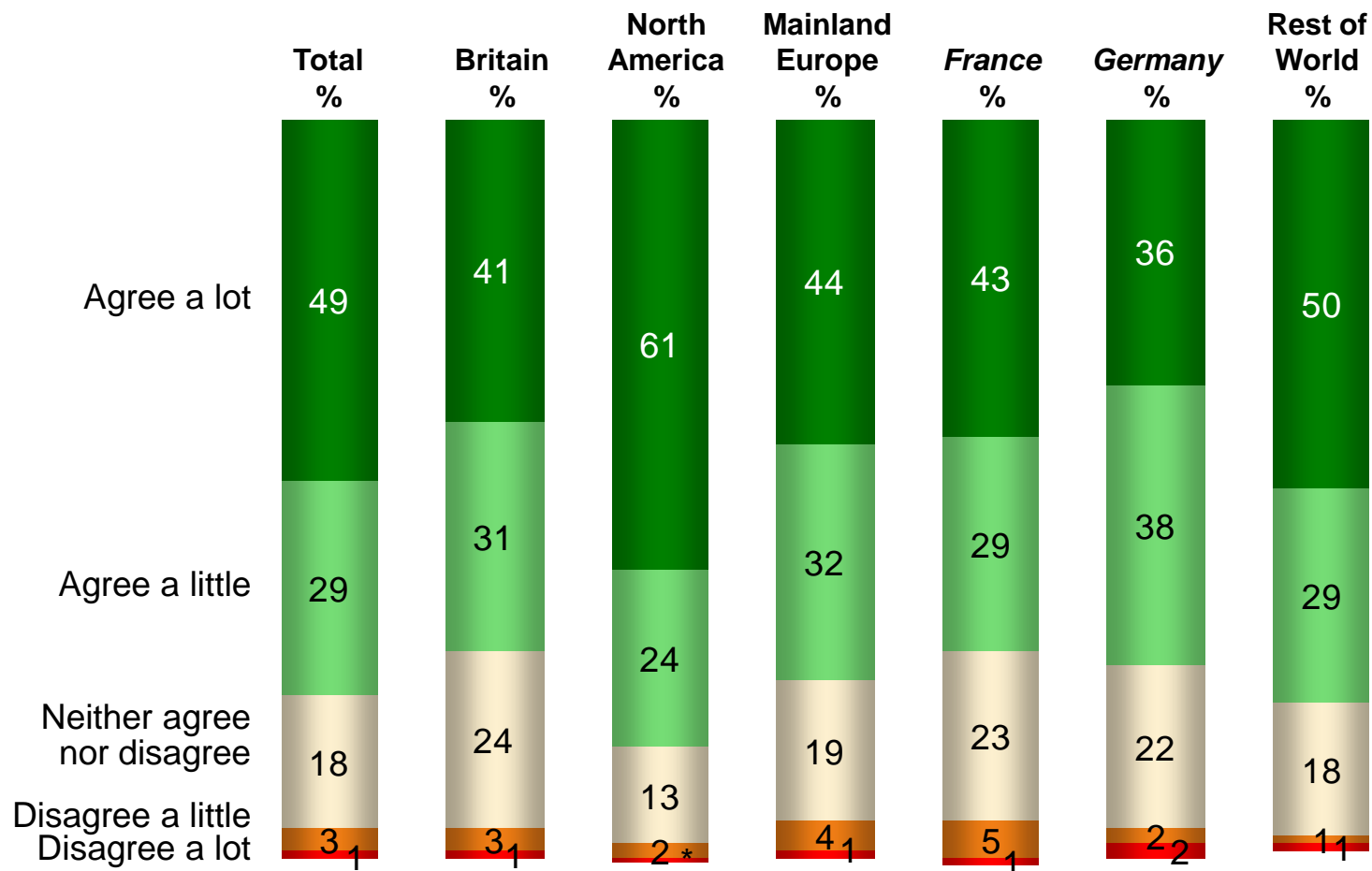
‘Provides opportunities to meet/mix with local people’



Agreement With Statements About Ireland

Base: All Giving an Opinion

'Has good evening entertainment and nightlife'



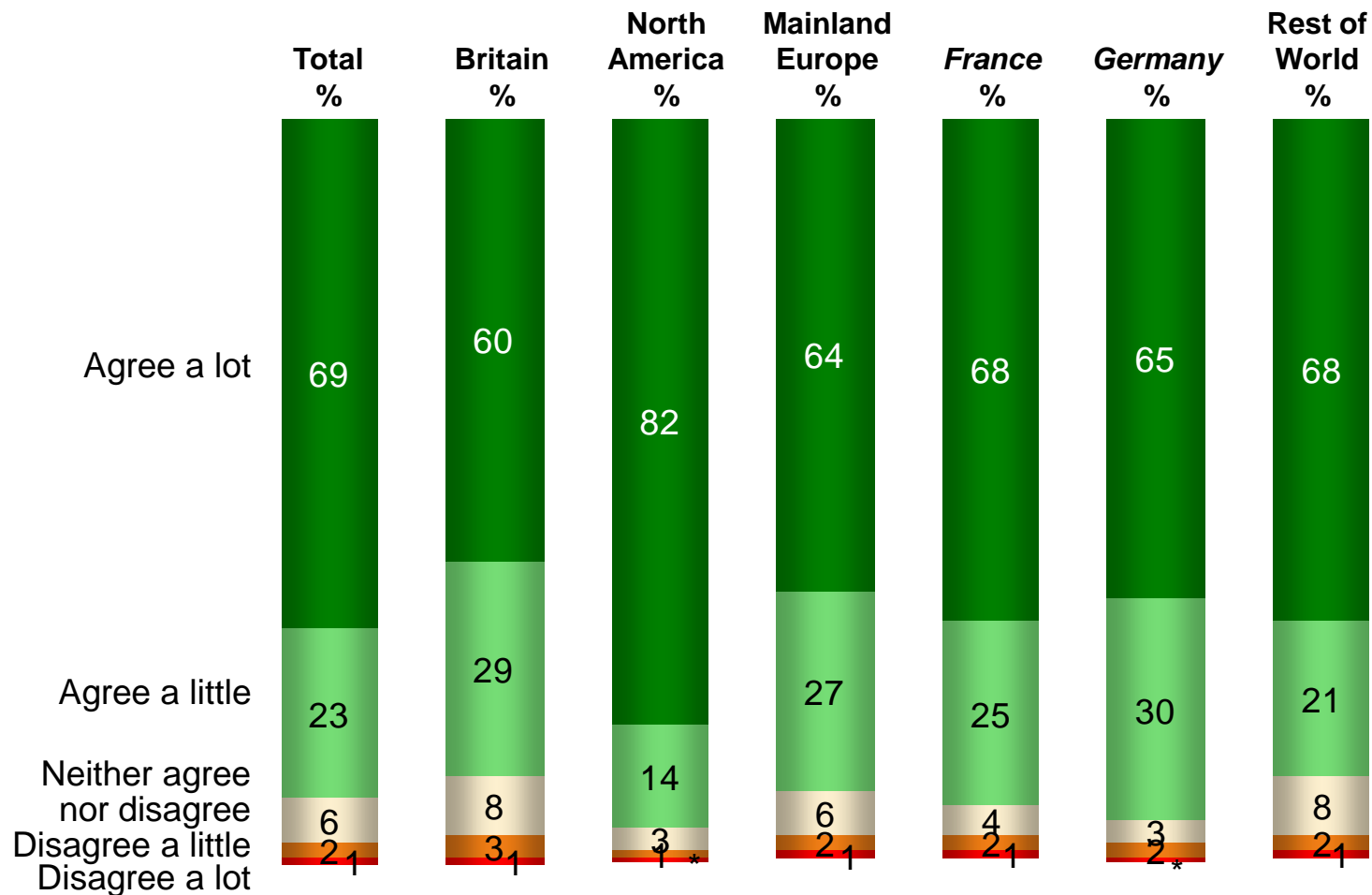
Agreement With Statements About Ireland



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Base: All Giving an Opinion

'Has plenty of things to do and see'



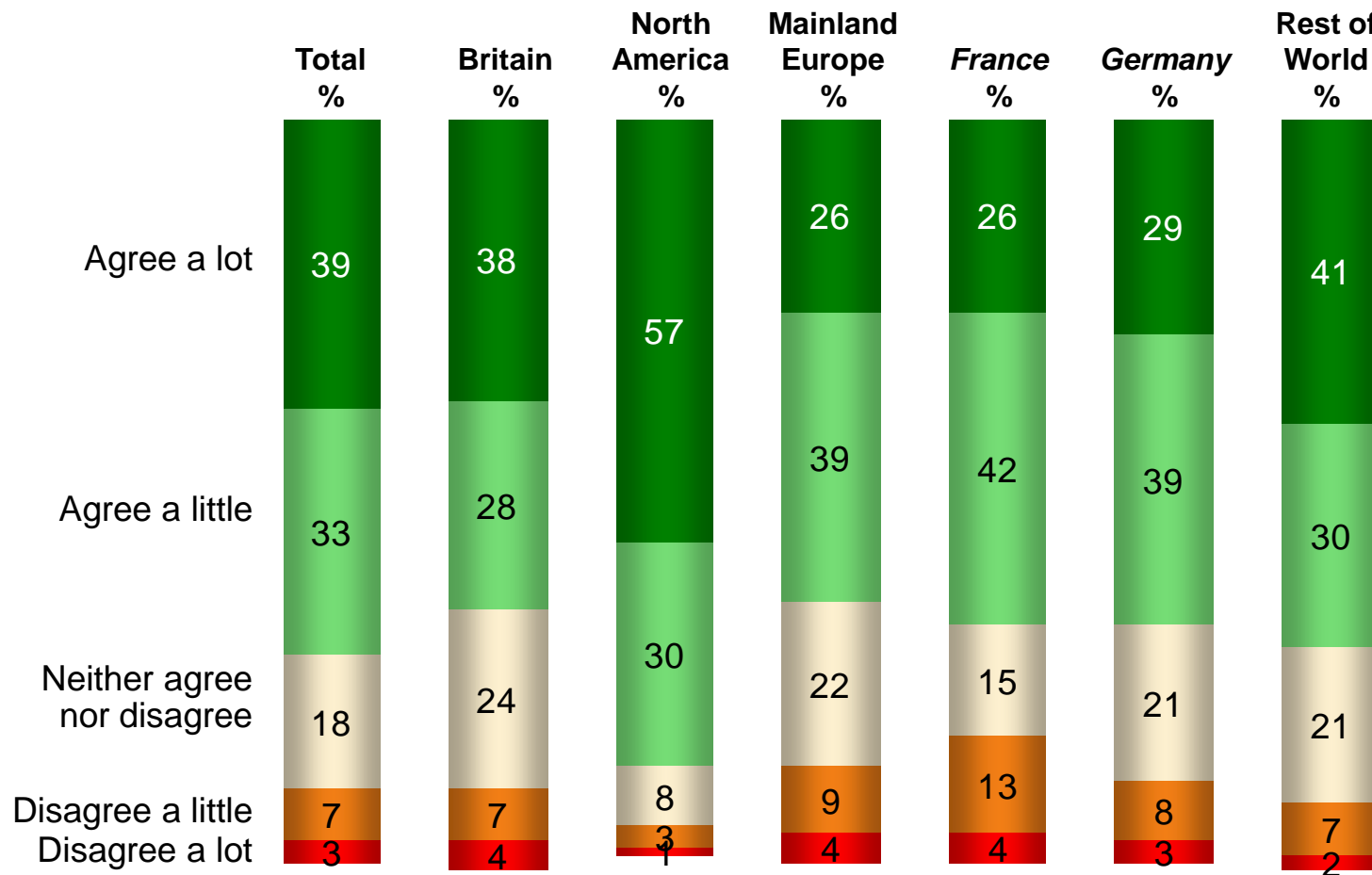
Agreement With Statements About Ireland



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Base: All Giving an Opinion

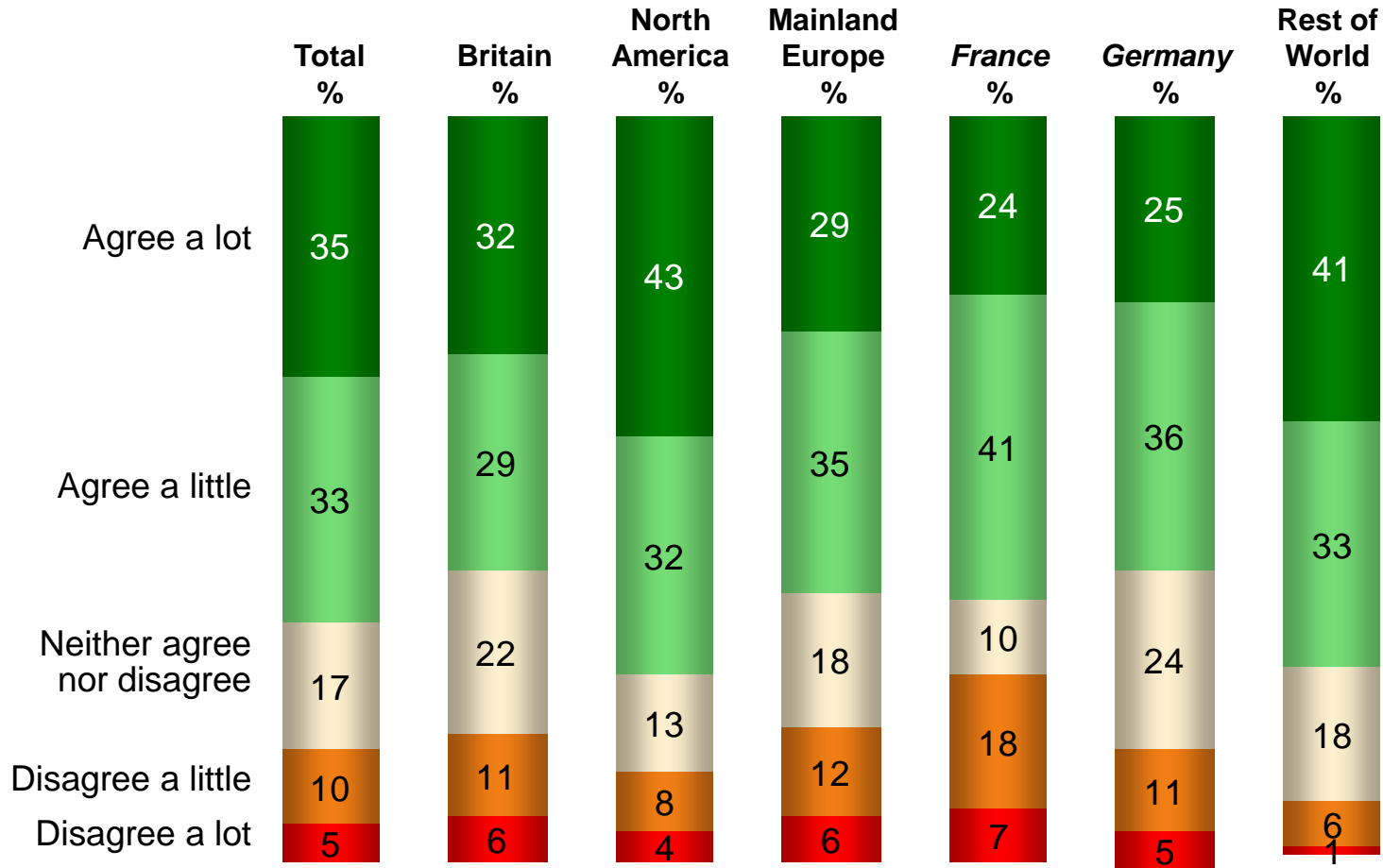
'Is a unique holiday destination – cannot experience anywhere else'



Agreement With Statements About Ireland

Base: All Giving an Opinion

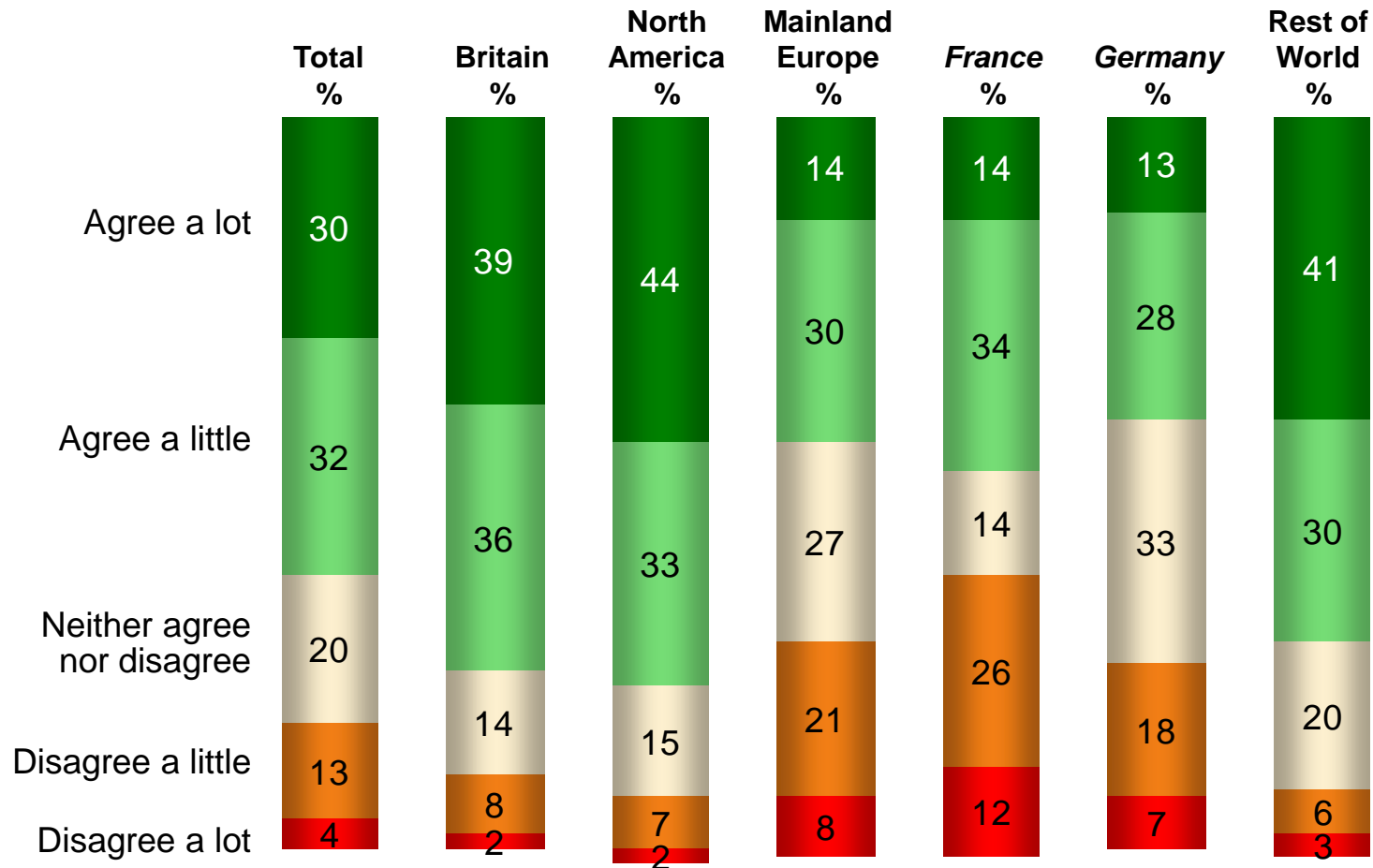
'Is easy to travel around/has a good transport infrastructure'



Agreement With Statements About Ireland

Base: All Giving an Opinion

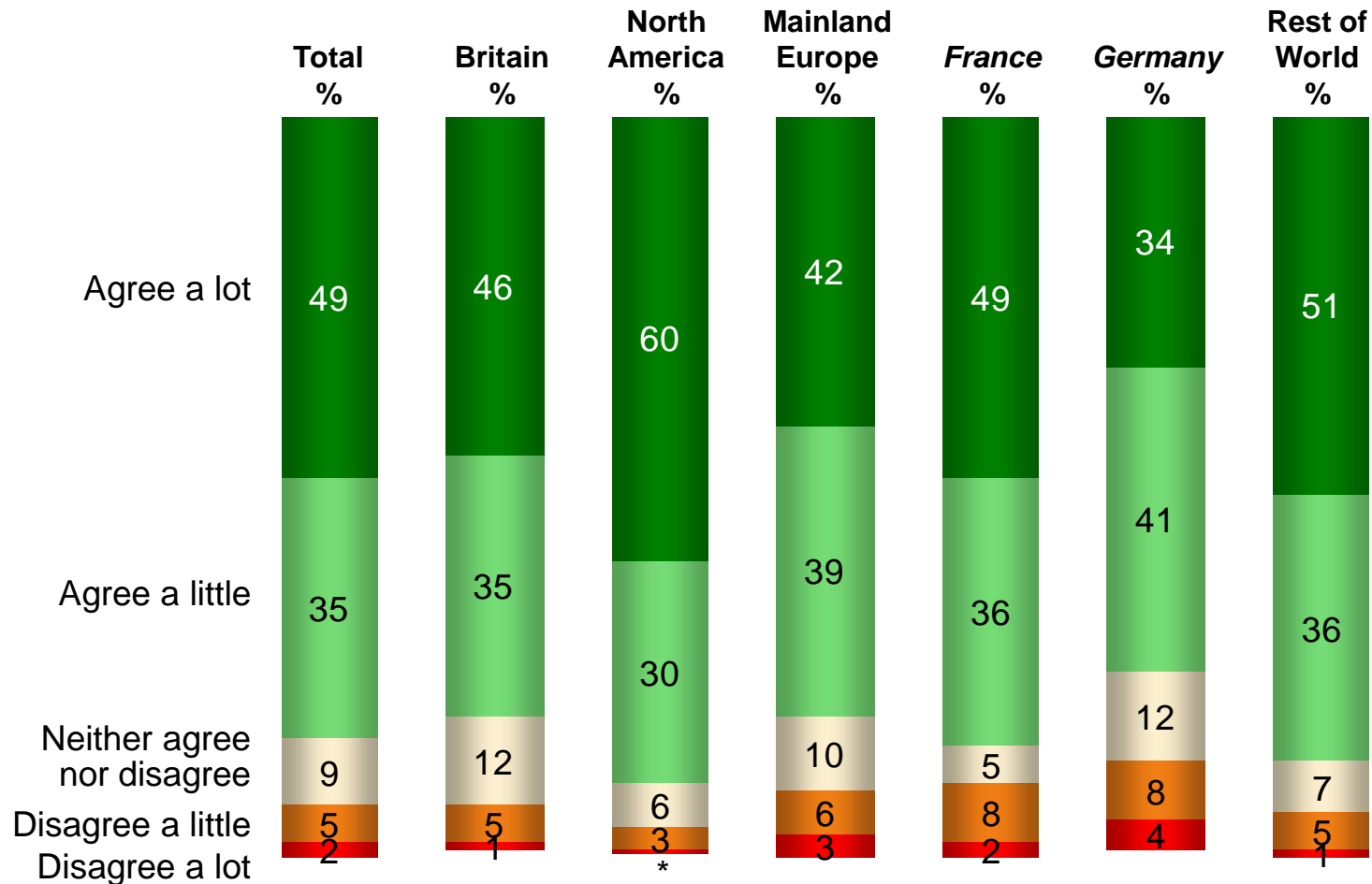
'Has a variety of high quality food'



Agreement With Statements About Ireland

Base: All Giving an Opinion

'Ireland is a clean & environmentally green destination'



Advantages – Most Frequently Mentioned

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

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
The Irish people	41	42	42	38	40	36	47
The scenery	24	16	23	28	34	25	20
Culture/history	18	11	22	16	22	14	29
English speaking	11	14	17	5	2	7	7
Drinks/pubs	7	7	5	8	9	10	6
Unspoilt environment	7	5	3	12	10	11	3
Restful/relaxing	6	9	2	8	8	7	4
Access/easy to get to	6	12	3	5	8	4	5
Ancestral/family connections	5	8	6	2	2	2	12
Interesting towns/villages	5	5	7	3	2	4	6
Small country/easy to see everything	3	1	3	3	1	4	3
Nature/Ecology	3	1	1	7	2	15	-
Quiet roads/drive on same side	2	5	1	1	*	1	5
Good food	2	4	3	1	1	1	4

Disadvantages – Most Frequently Mentioned

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

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Weather	16	17	10	20	22	12	20
High cost of living	15	29	8	15	13	24	9
Bad roads	13	9	17	13	18	15	5
Driving difficult	6	1	10	6	9	6	1
Food costs	6	12	3	7	8	11	4
Poor internal transport	6	2	5	8	7	5	6
Poor signposting	4	2	7	2	4	3	8
Difficulty of access	4	2	3	5	3	7	6
Food quality	3	1	3	5	7	5	1
Accommodation Costs	2	2	*	3	5	2	3
Litter/hygiene	2	1	1	2	3	2	3
Drink costs	2	6	*	3	*	7	*
Exchange rates	1	4	1	-	-	-	1

Overall Opinion of Their Irish Holiday

Base: All Respondents

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Exceeded expectations	36	29	50	29	24	34	40
Matched expectations	59	66	46	67	69	62	51
Did not live up to expectations	3	3	2	3	4	2	5
Don't know/not stated	2	2	2	2	3	2	4

The Reasons Why Expectations Exceeded



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	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Irish People	44	36	46	46	48	44	46
Scenery	40	36	43	39	44	39	39
History/culture	12	5	16	10	12	12	11
Weather	11	17	8	12	6	17	13
Food quality/variety	9	9	13	4	2	3	6
Well kept countryside/no litter/neat/ clean	6	7	6	5	-	7	6
Nature/wildlife/flora/fauna	6	1	3	13	8	18	2
Activities – something for all	5	7	4	5	4	4	3
Good internal transport	5	6	5	3	2	3	7
Great place	5	4	5	5	4	1	2
Good accommodation	4	9	4	3	4	4	4
Relaxing/slow/easy going	3	6	1	5	5	3	4
Clean environment/no pollution	3	1	2	4	3	4	2
Service good / helpful / friendly	3	5	4	1	1	*	5
Roads better than expected	2	2	3	1	-	*	3

Would Ireland be Recommended?



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Base: All Respondents

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Yes, definitely	88	83	90	89	88	90	85
Yes, with reservations	10	14	8	10	10	8	10
No	*	1	*	*	*	*	1
Don't know	2	2	1	1	1	2	5
Why with reservations?							*
High prices	27	49	15	20	13	28	
Weather	13	7	10	21	17	16	
Roads/driving	9	6	11	10	9	15	
Food/drink – high costs/poor quality	7	13	3	5	5	2	
Dissatisfied with accommodation	5	4	3	7	4	6	
Poor internal transport	4	3	6	3	10	5	
Airport queues/security/delays	2	5	1	1	-	2	

*Base too small for analysis

Likelihood Of Returning For Another Holiday

Base: All Respondents

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Definitely - I'll be back later this year	8	20	3	7	8	6	3
Definitely - I'll be back next year	15	27	7	16	13	17	5
Definitely - I'll be back in the next few years	29	22	29	33	38	40	29
I hope so - at some time in future	39	26	49	37	34	31	44
Probably not	5	2	7	4	3	3	11
Definitely not	*	*	1	*	*	-	*
Don't know	3	3	4	3	4	4	6

Incidence Of Visiting Historical & Cultural Attractions

Base: All Respondents

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Visited any	62	44	68	67	67	71	61
Historic Houses & Castles	51	28	61	54	48	62	54
Monuments & Historic Sites	50	28	59	53	51	57	50
Gardens	36	21	36	44	43	44	37
Heritage & Interpretative Centres	30	19	35	31	22	27	26
Museums & Art Galleries	28	18	30	32	28	31	28

Satisfaction With Historic Houses/Castles



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Base: All Giving a Rating

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Satisfaction with range							
Very satisfied	45	43	60	35	23	38	42
Satisfied	43	44	35	49	50	53	49
Neither	9	10	5	13	24	8	7
Dissatisfied	1	2	*	2	3	*	2
Very Dissatisfied	1	1	*	1	*	*	-
Satisfaction with quality							
Very satisfied	40	43	55	27	21	31	39
Satisfied	47	44	37	54	55	54	49
Neither	11	9	6	16	21	15	9
Dissatisfied	2	3	1	2	3	*	2
Very Dissatisfied	1	1	1	*	*	*	-
Satisfaction with admission charges							
Very satisfied	21	27	31	11	9	12	20
Satisfied	35	37	40	29	23	31	42
Neither	27	23	17	36	39	33	25
Dissatisfied	14	9	10	19	23	20	10
Very Dissatisfied	4	3	2	5	6	4	3

Satisfaction With Monuments/Historic Sites

Base: All Giving a Rating

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Satisfaction with range							
Very satisfied	45	42	59	34	26	40	43
Satisfied	44	45	35	51	53	51	46
Neither	9	12	4	12	19	7	10
Dissatisfied	2	1	1	2	1	1	1
Very Dissatisfied	1	*	1	1	*	1	-
Satisfaction with quality							
Very satisfied	42	39	58	29	24	32	42
Satisfied	55	49	35	53	53	53	43
Neither	11	11	6	15	19	14	13
Dissatisfied	2	2	1	3	4	1	2
Very Dissatisfied	*	*	*	*	*	*	-
Satisfaction with admission charges							
Very satisfied	25	27	37	15	10	19	28
Satisfied	35	37	38	32	30	32	38
Neither	27	26	17	34	35	30	26
Dissatisfied	10	8	6	15	19	16	6
Very Dissatisfied	3	3	2	4	6	3	1

Satisfaction With Heritage/Interpretative Centres

Base: All Giving a Rating

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Satisfaction with range							
Very satisfied	40	34	53	30	18	30	35
Satisfied	43	49	35	46	49	44	51
Neither	14	14	9	19	26	22	14
Dissatisfied	3	3	2	3	6	3	*
Very Dissatisfied	1	1	1	1	1	1	-
Satisfaction with quality							
Very satisfied	41	39	51	33	23	31	40
Satisfied	43	46	39	46	52	44	51
Neither	12	12	8	17	19	20	8
Dissatisfied	2	2	2	3	5	4	*
Very Dissatisfied	1	1	1	1	1	1	-
Satisfaction with admission charges							
Very satisfied	25	25	37	15	16	16	22
Satisfied	37	36	37	34	34	29	41
Neither	26	27	16	33	33	34	29
Dissatisfied	9	7	6	13	14	18	9
Very Dissatisfied	3	4	2	4	2	3	-

Satisfaction With Museums/Art Galleries



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Base: All Giving a Rating

	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Satisfaction with range							
Very satisfied	38	34	47	32	23	31	37
Satisfied	42	48	38	43	52	46	41
Neither	16	15	11	20	20	21	18
Dissatisfied	3	2	2	4	4	1	4
Very Dissatisfied	1	1	1	1	*	*	-
Satisfaction with quality							
Very satisfied	40	37	53	32	23	31	31
Satisfied	44	43	36	47	55	49	53
Neither	13	15	9	16	16	16	10
Dissatisfied	2	3	1	3	4	3	6
Very Dissatisfied	1	1	1	1	2	1	-
Satisfaction with admission charges							
Very satisfied	38	36	49	30	33	38	37
Satisfied	31	29	31	31	31	23	32
Neither	21	24	13	26	32	29	24
Dissatisfied	7	7	5	9	12	8	7
Very Dissatisfied	3	4	2	4	3	2	-

Satisfaction With Gardens



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Base: All Giving a Rating

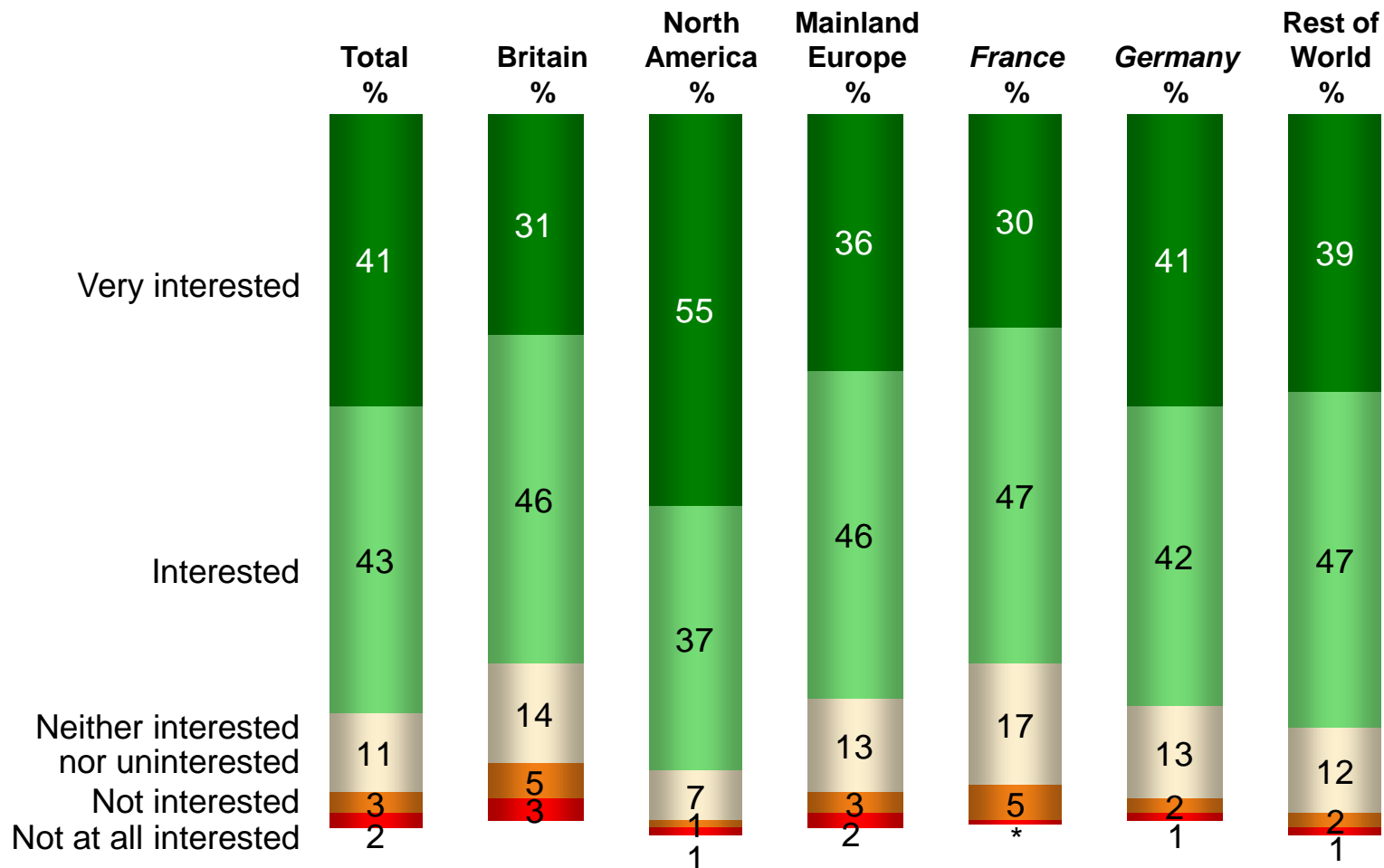
	Total %	Britain %	North America %	Mainland Europe %	France %	Germany %	Rest of World %
Satisfaction with range							
Very satisfied	46	44	52	44	34	40	40
Satisfied	41	41	37	43	49	45	51
Neither	10	14	9	11	14	14	7
Dissatisfied	1	1	1	1	1	1	2
Very Dissatisfied	1	-	1	1	1	*	-
Satisfaction with quality							
Very satisfied	50	45	56	48	39	45	46
Satisfied	40	44	35	42	45	43	47
Neither	8	10	7	9	15	10	6
Dissatisfied	1	2	2	*	*	1	-
Very Dissatisfied	1	-	1	1	*	1	1
Satisfaction with admission charges							
Very satisfied	35	38	42	31	26	26	37
Satisfied	34	31	37	33	38	32	41
Neither	20	22	13	25	25	27	16
Dissatisfied	7	7	5	9	9	13	6
Very Dissatisfied	3	3	3	3	3	2	-

Level of Interest in Historic Ireland



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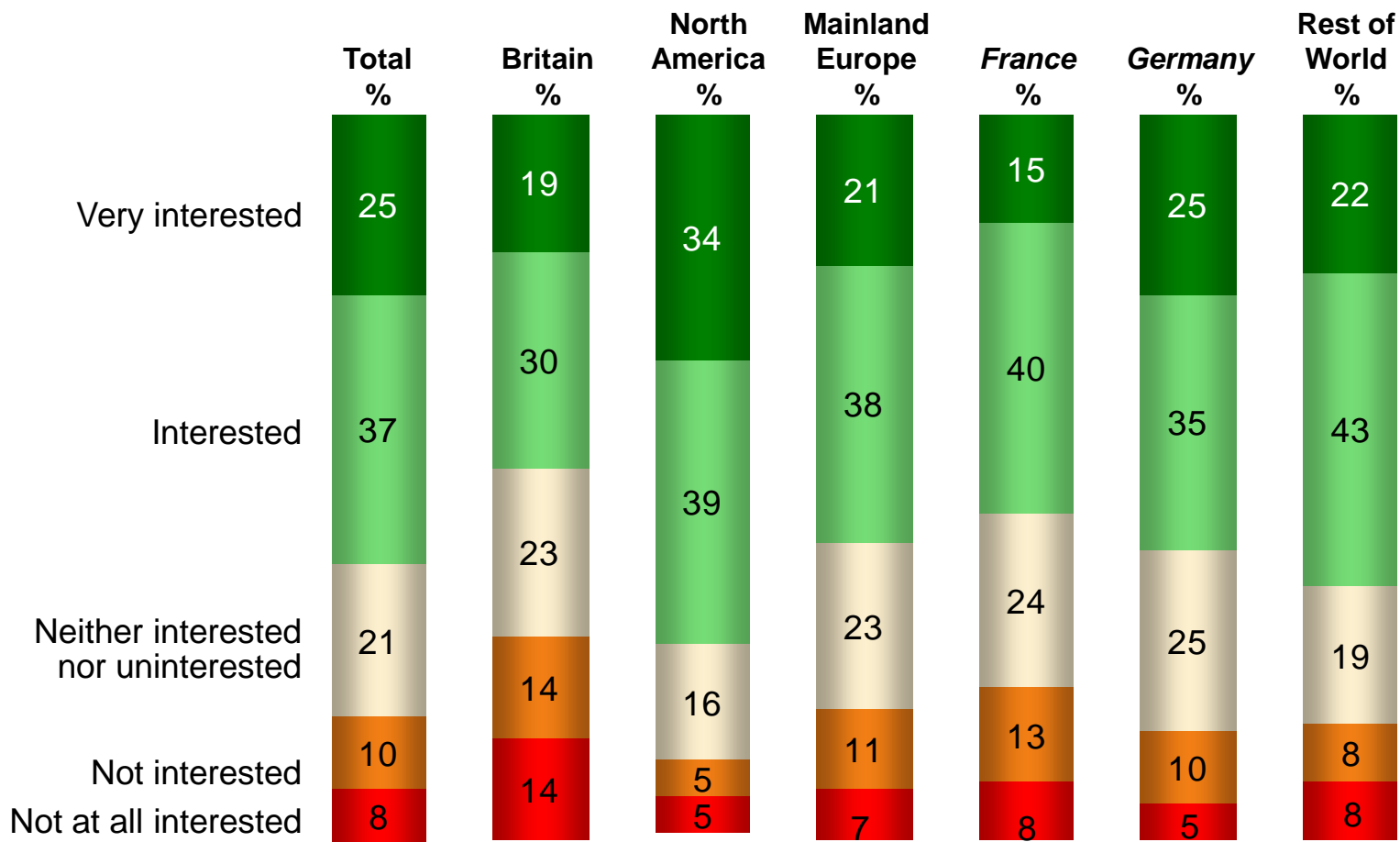
Base: All Giving an Opinion



Historic Ireland: Historic houses, towns, heritage centres, museums etc

Level of Interest in Christian Ireland

Base: All Giving an Opinion



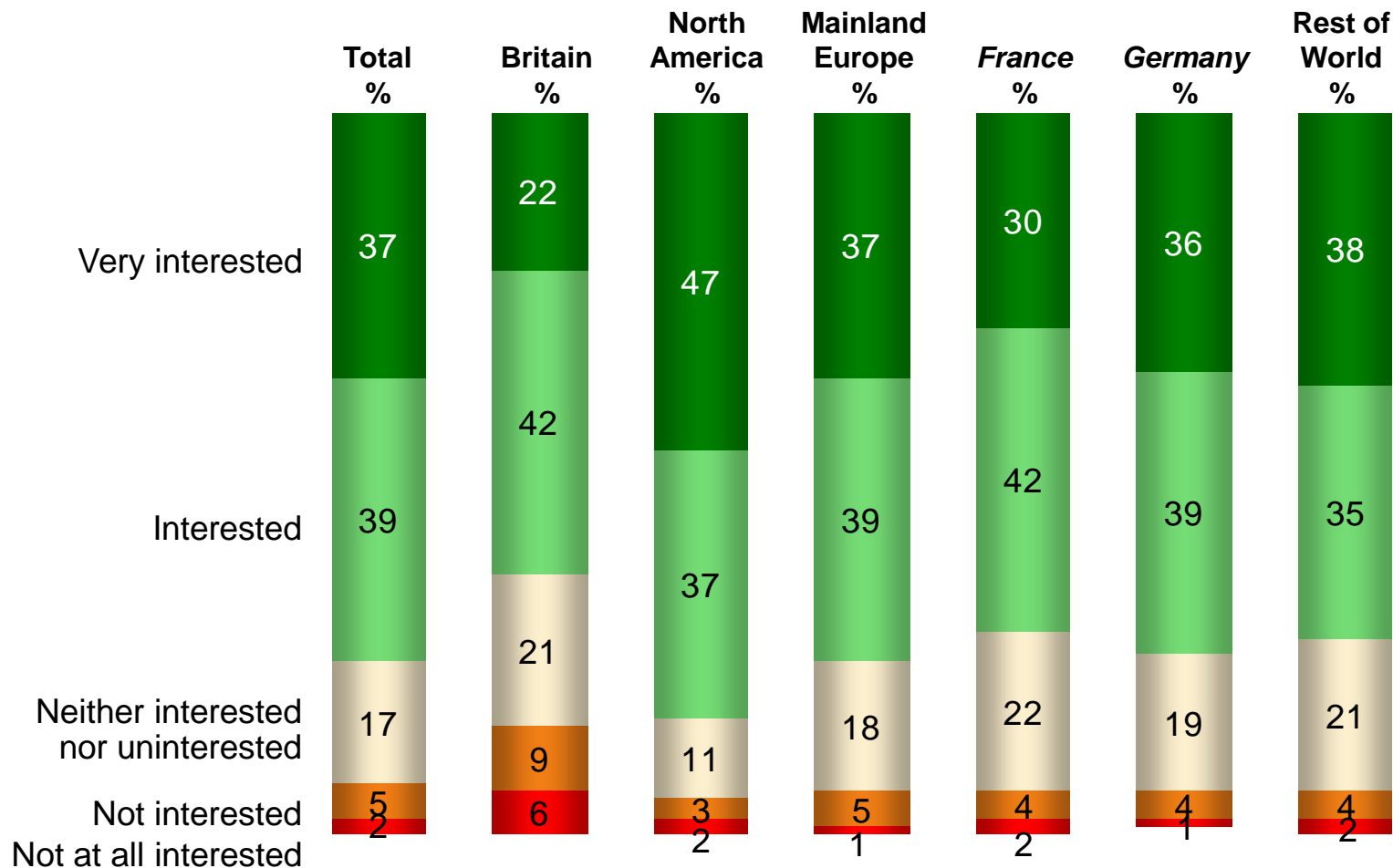
Christian Ireland: Churches, Abbeys, Monasteries etc

Level of Interest in Celtic Ireland



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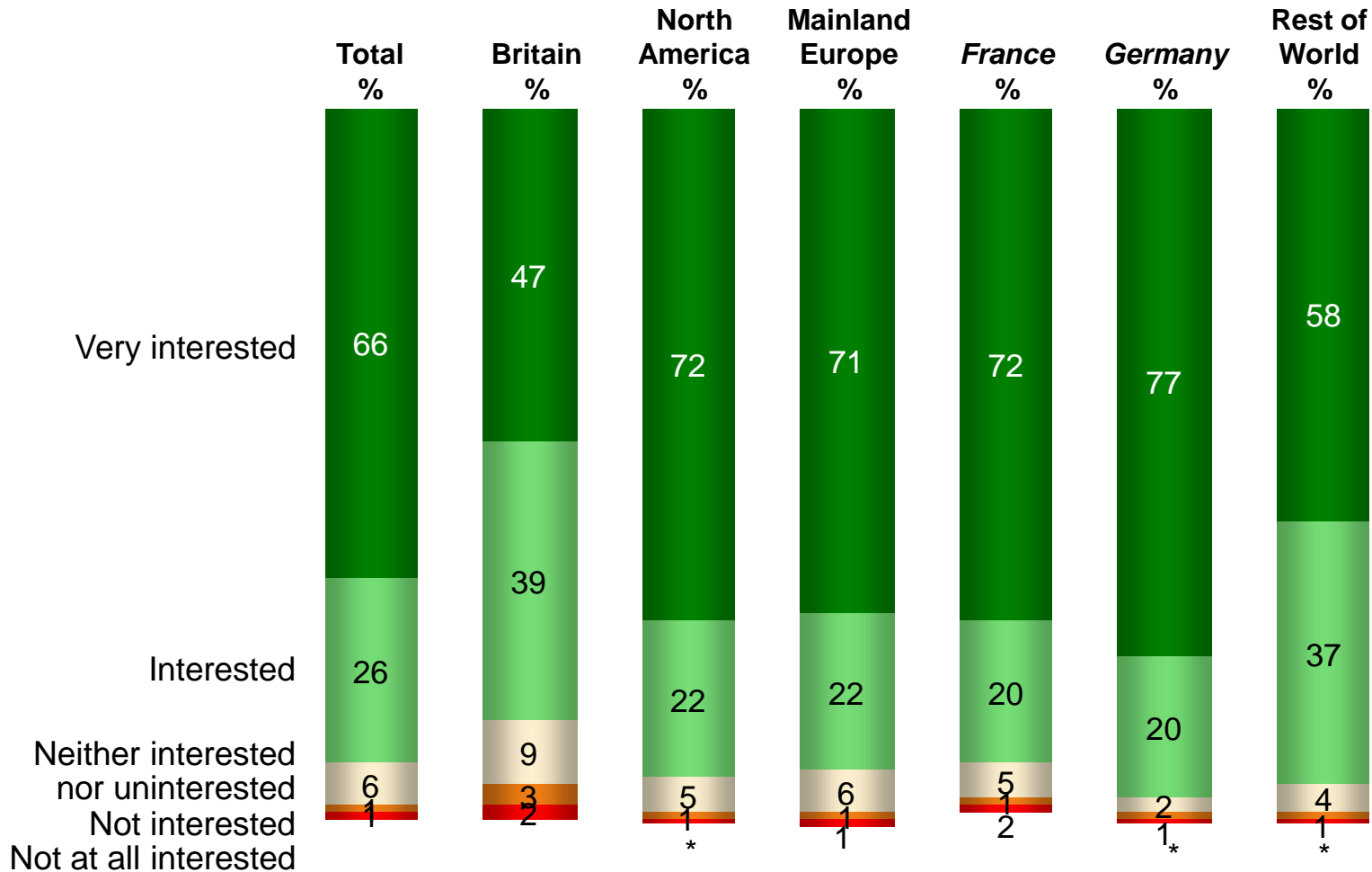
Base: All Giving an Opinion



Celtic Ireland: Celtic sites, artifacts, language, myth and legend

Level of Interest in Natural Ireland

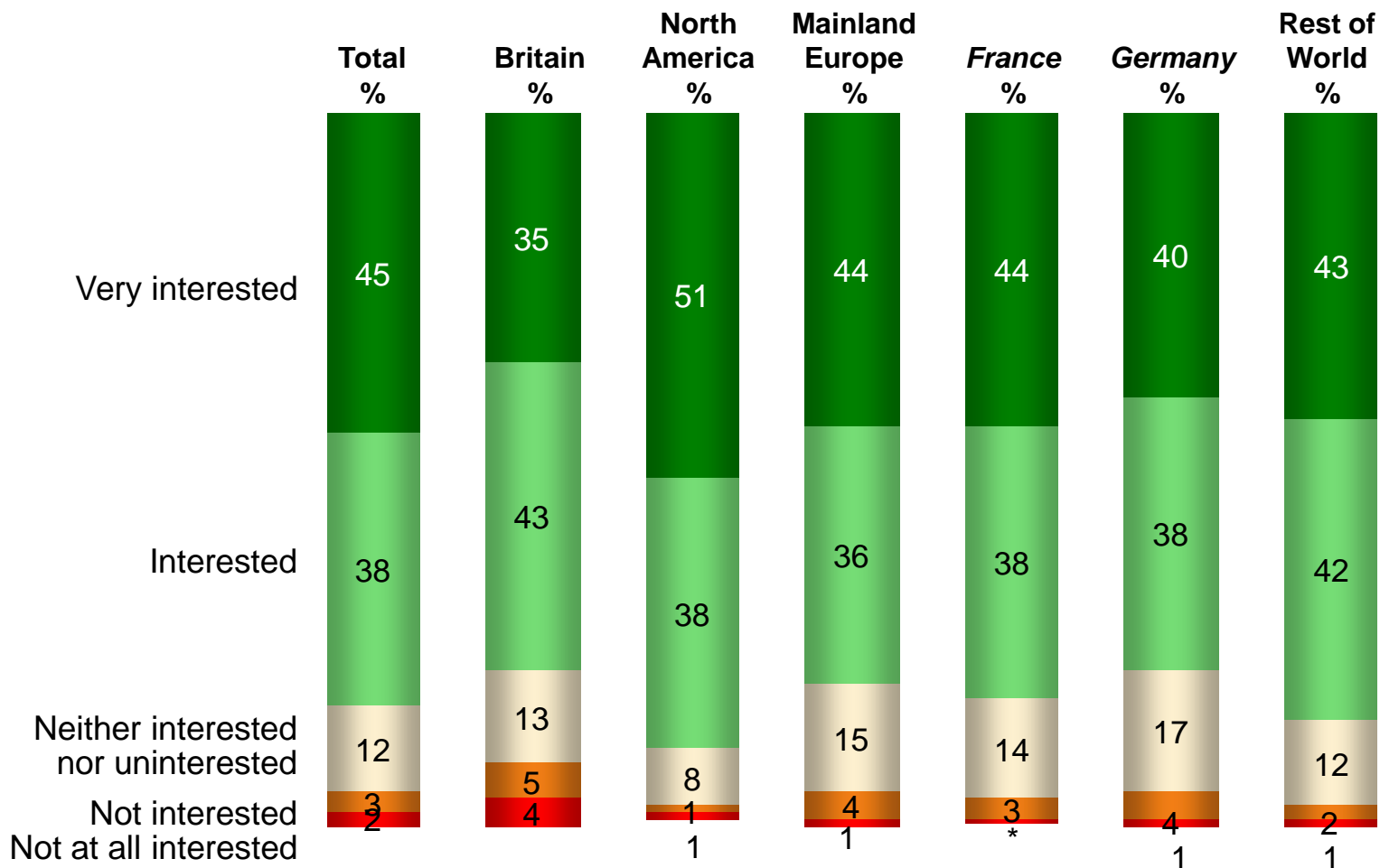
Base: All Giving an Opinion



Natural Ireland: Natural attractions such as the Burren, Cliffs of Moher etc

Level of Interest in Traditional Culture

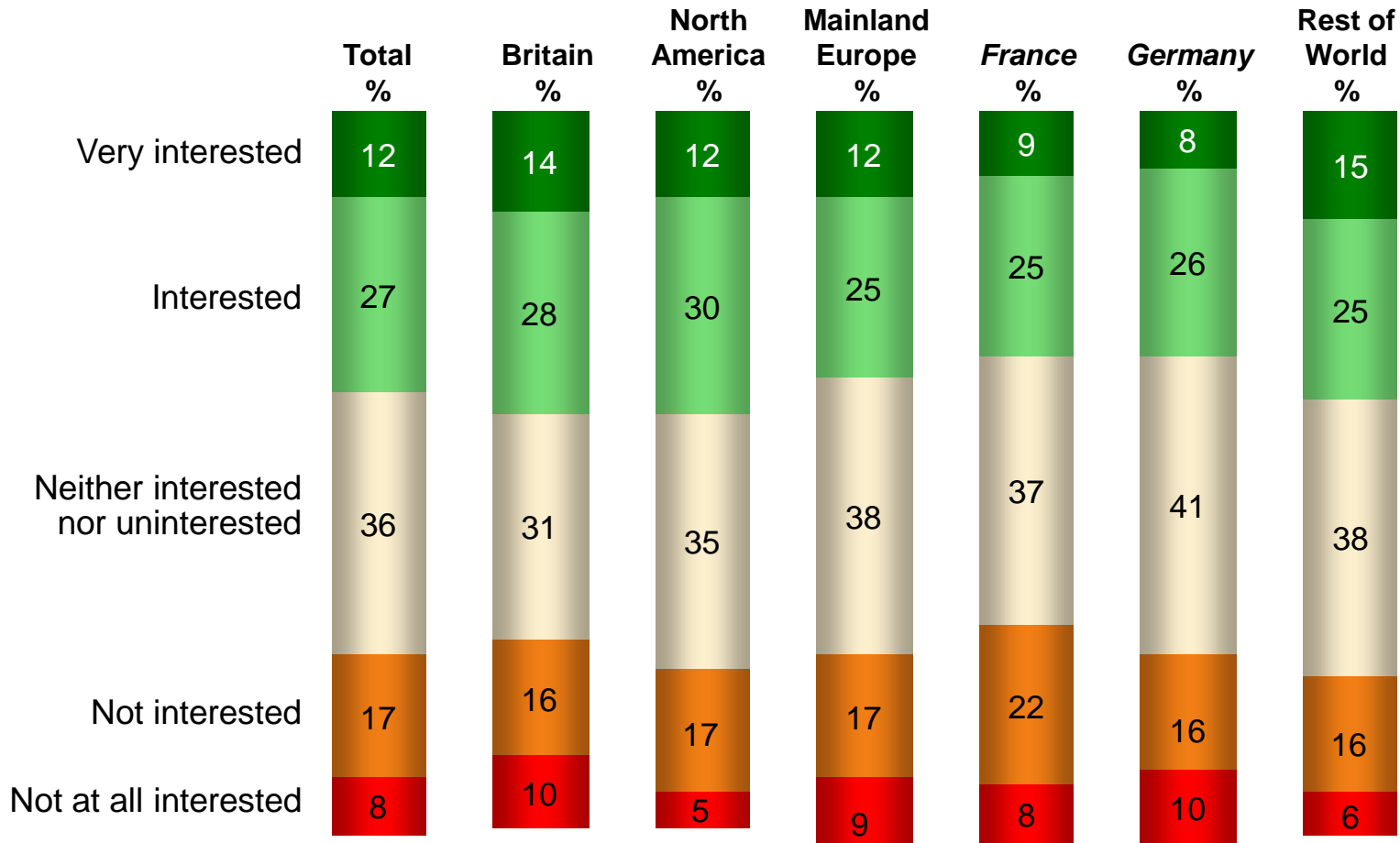
Base: All Giving an Opinion



Traditional Culture: Traditional music, song, dance, Irish language etc

Level of Interest in Contemporary Culture

Base: All Giving an Opinion

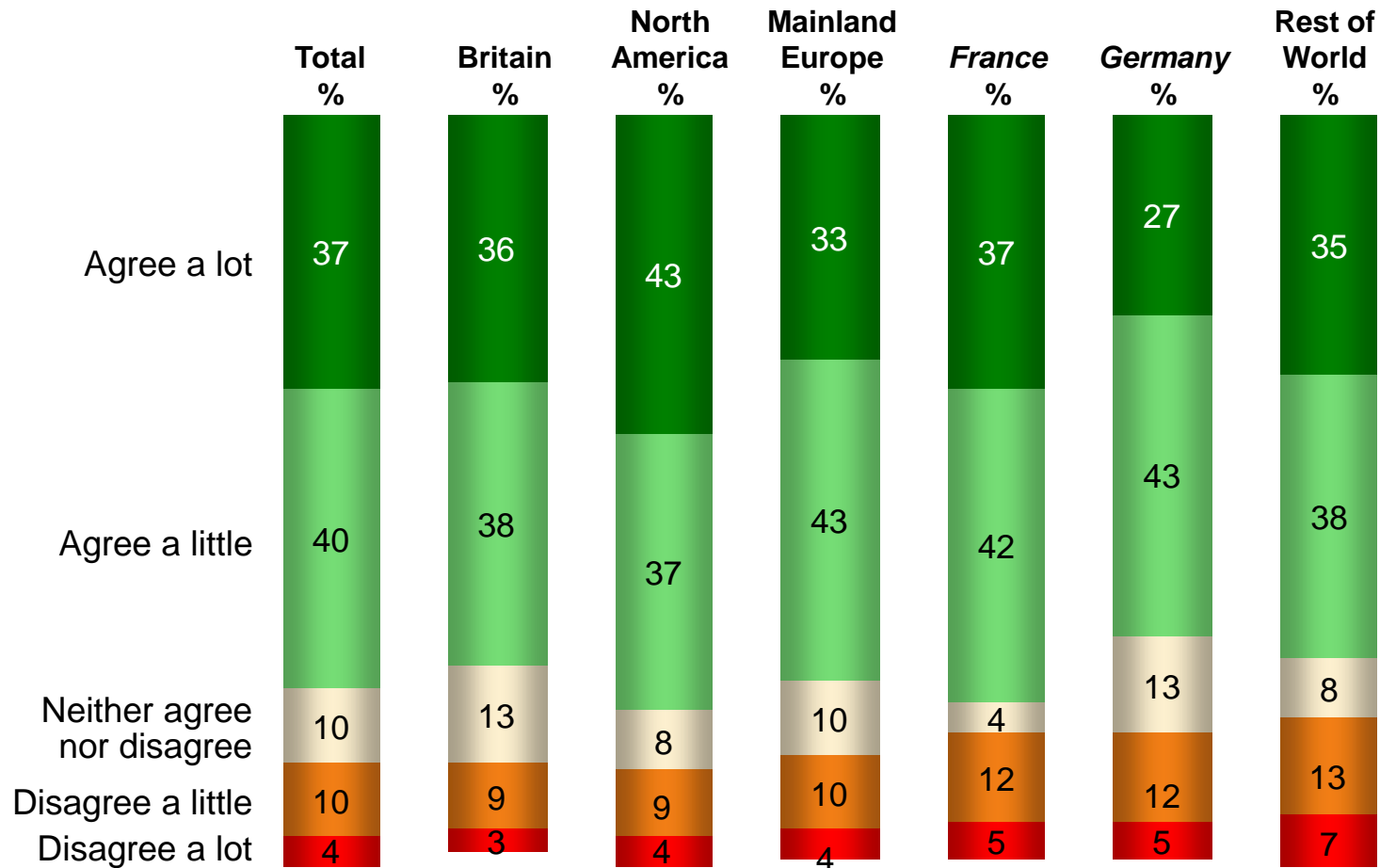


Contemporary Culture: Performing arts, visual arts, crafts, film, literature, architecture etc

Perceptions of the Urban and Rural Environment

Base: All Giving an Opinion

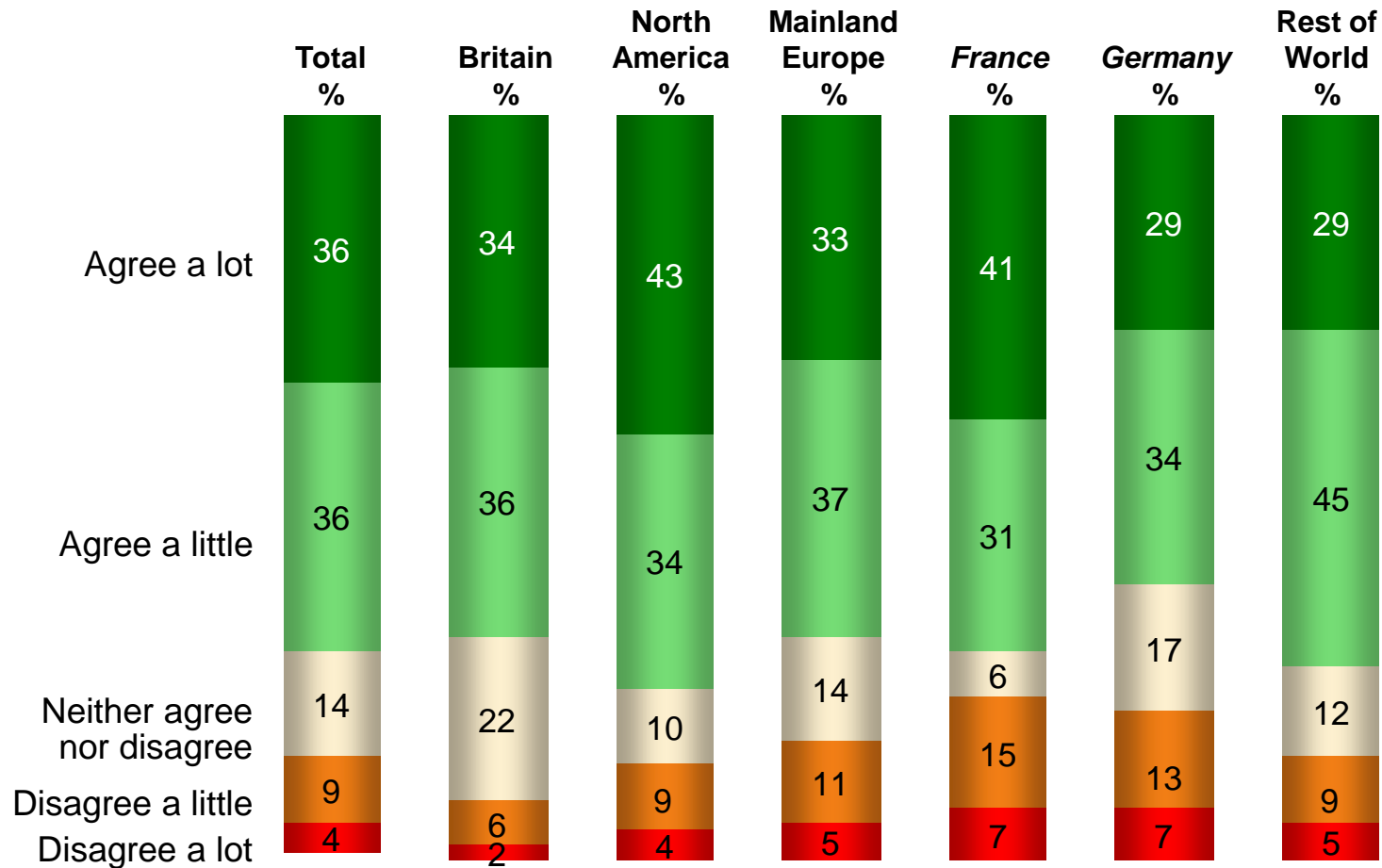
'The streets in Irish cities are clean and litter free'



Perceptions of the Urban and Rural Environment

Base: All Giving an Opinion

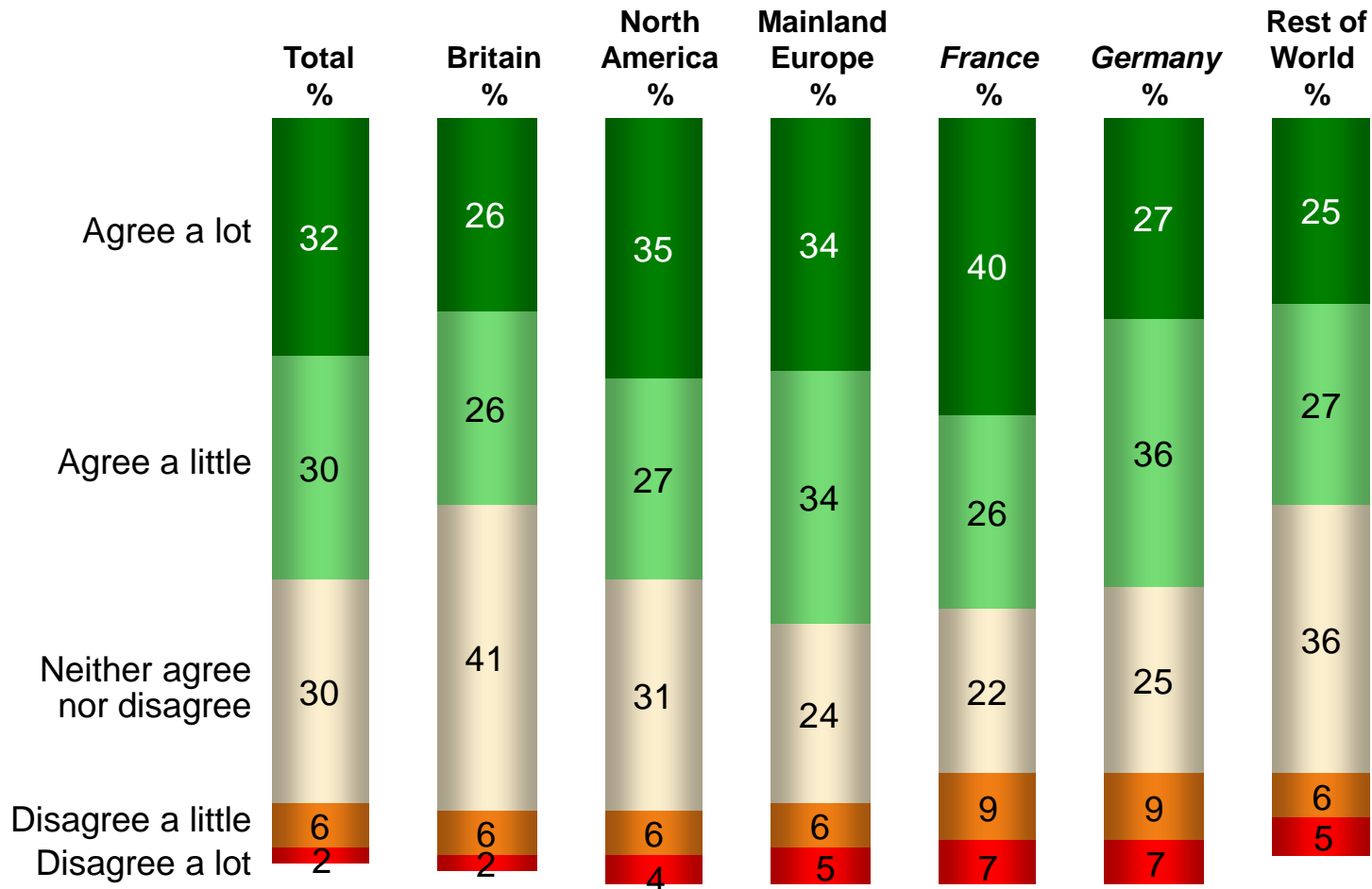
'The streets in Irish cities are well provided with litter bins'



Perceptions of the Urban and Rural Environment

Base: All Giving an Opinion

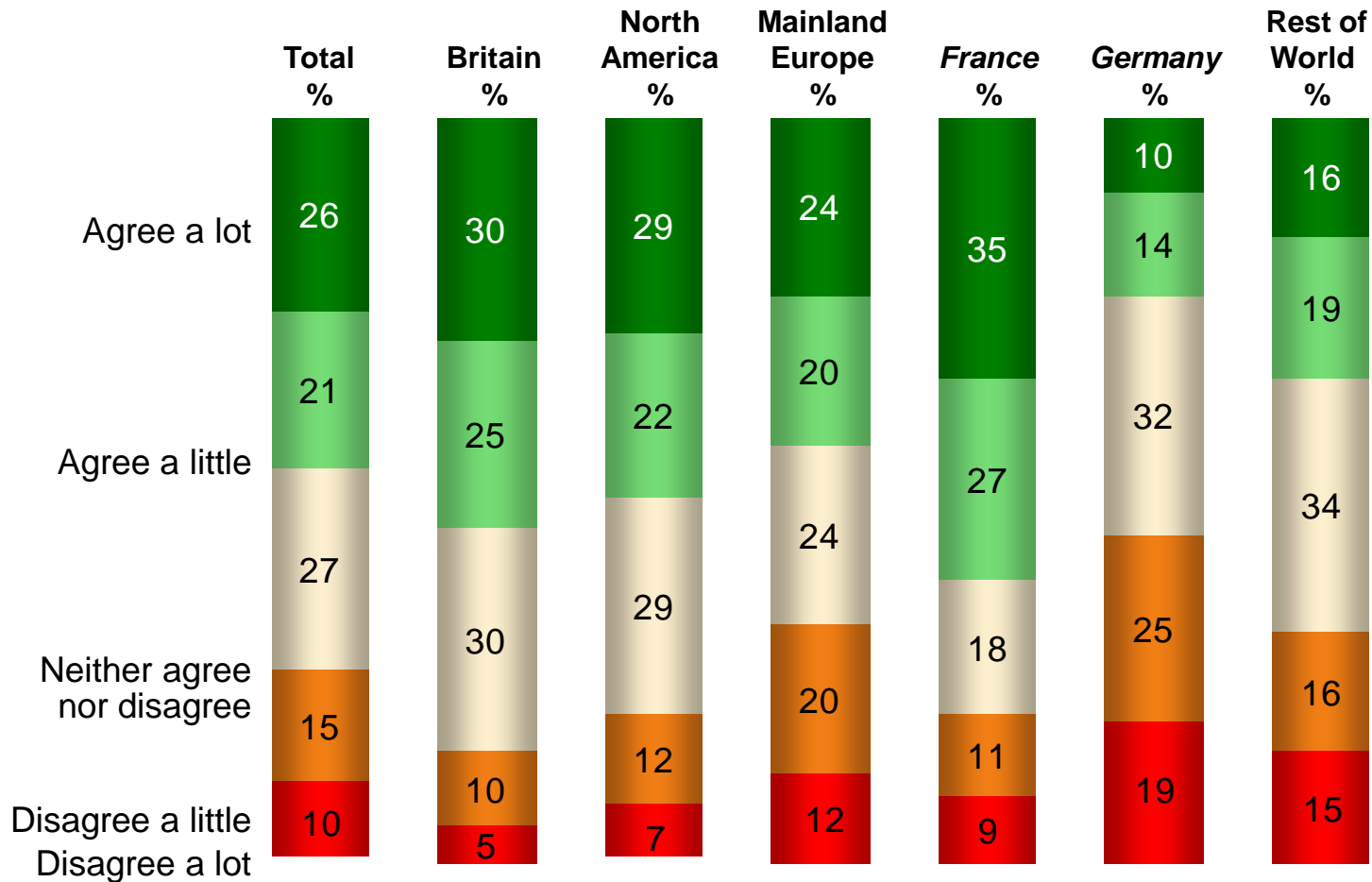
'Litter bins on Irish streets are emptied regularly'



Perceptions of the Urban and Rural Environment

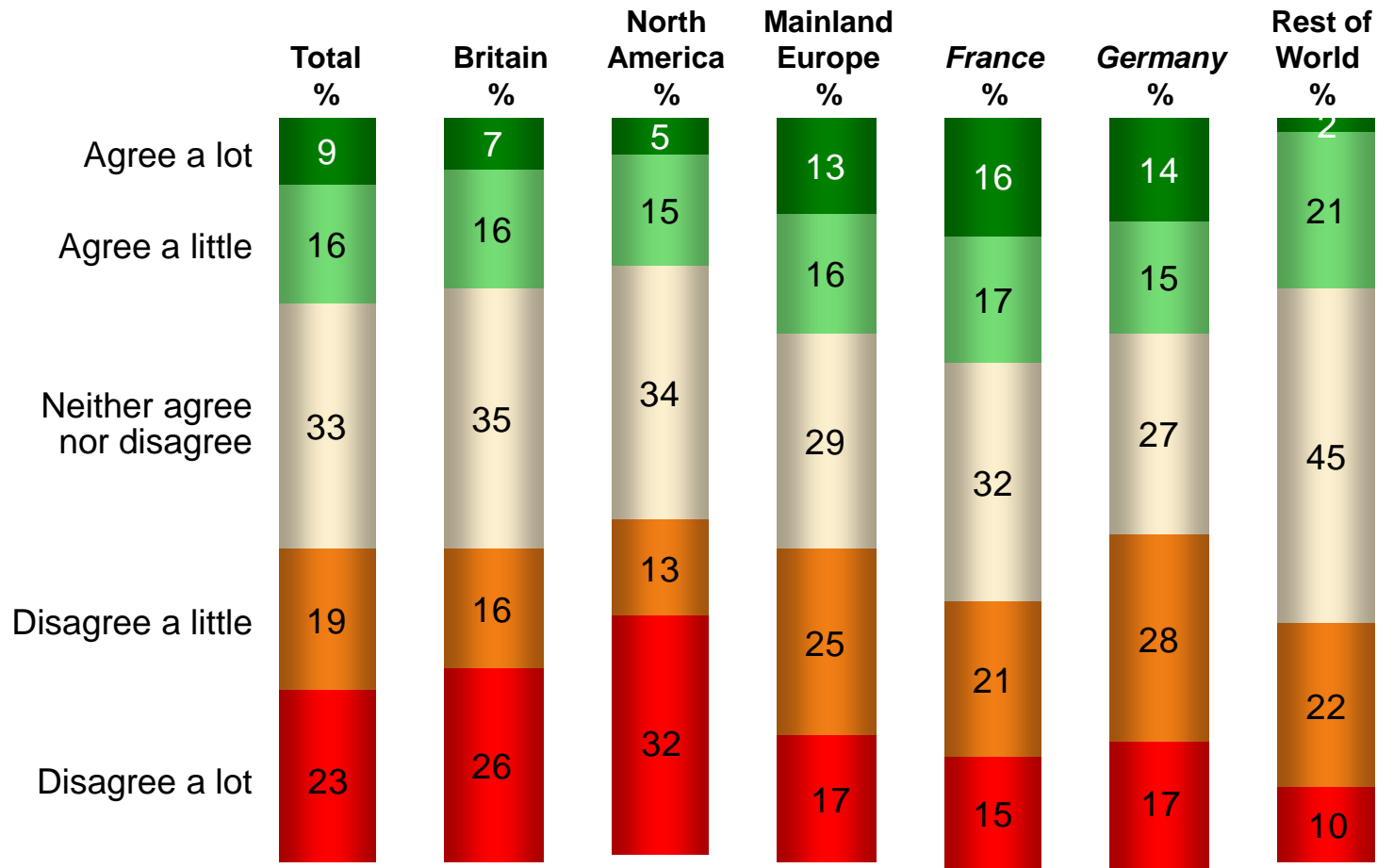
Base: All Giving an Opinion

'Irish streets are cleaner than the streets in my own country'



Base: All Giving an Opinion

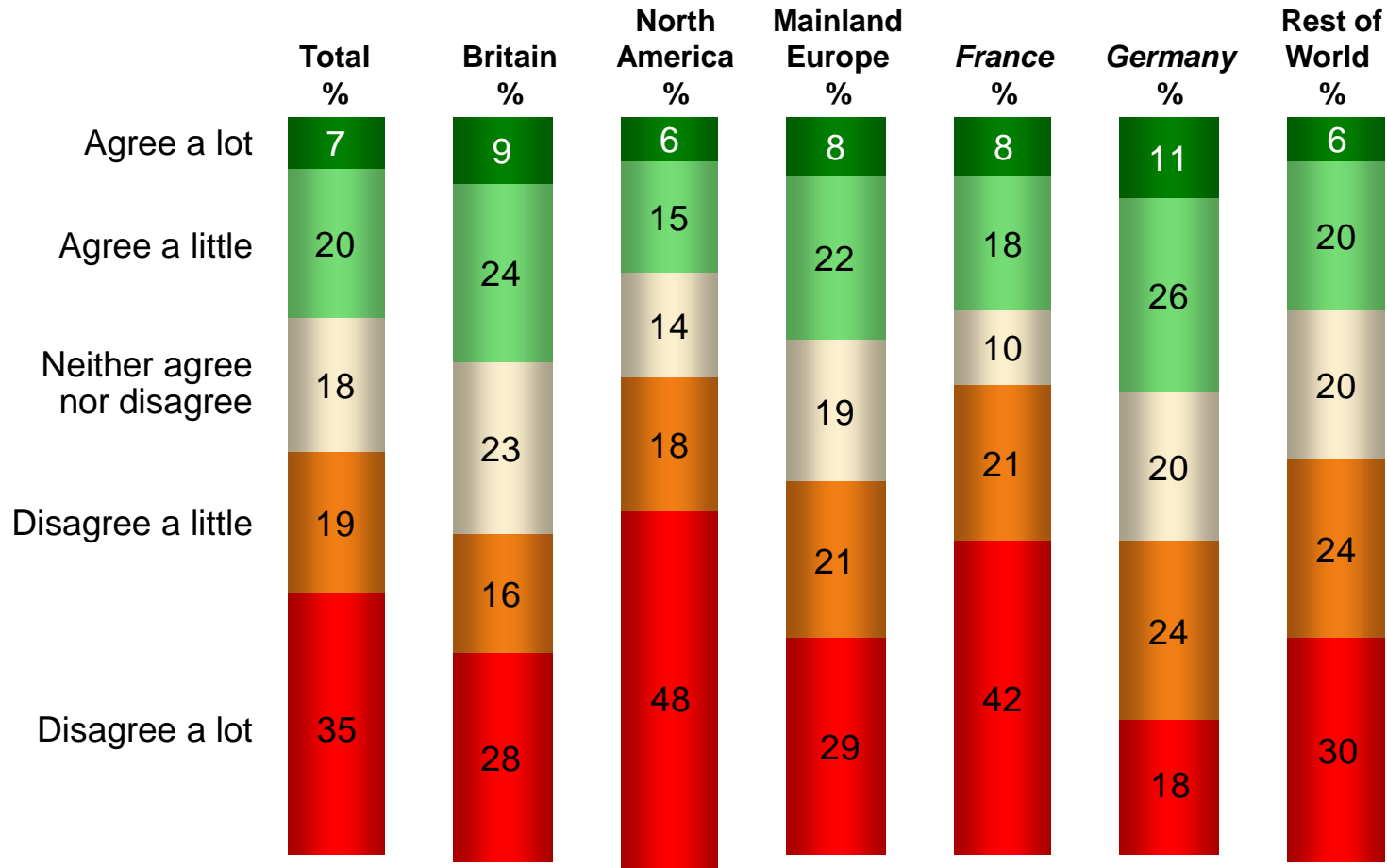
'Litter on Irish beaches is a real problem'



Perceptions of the Urban and Rural Environment

Base: All Giving an Opinion

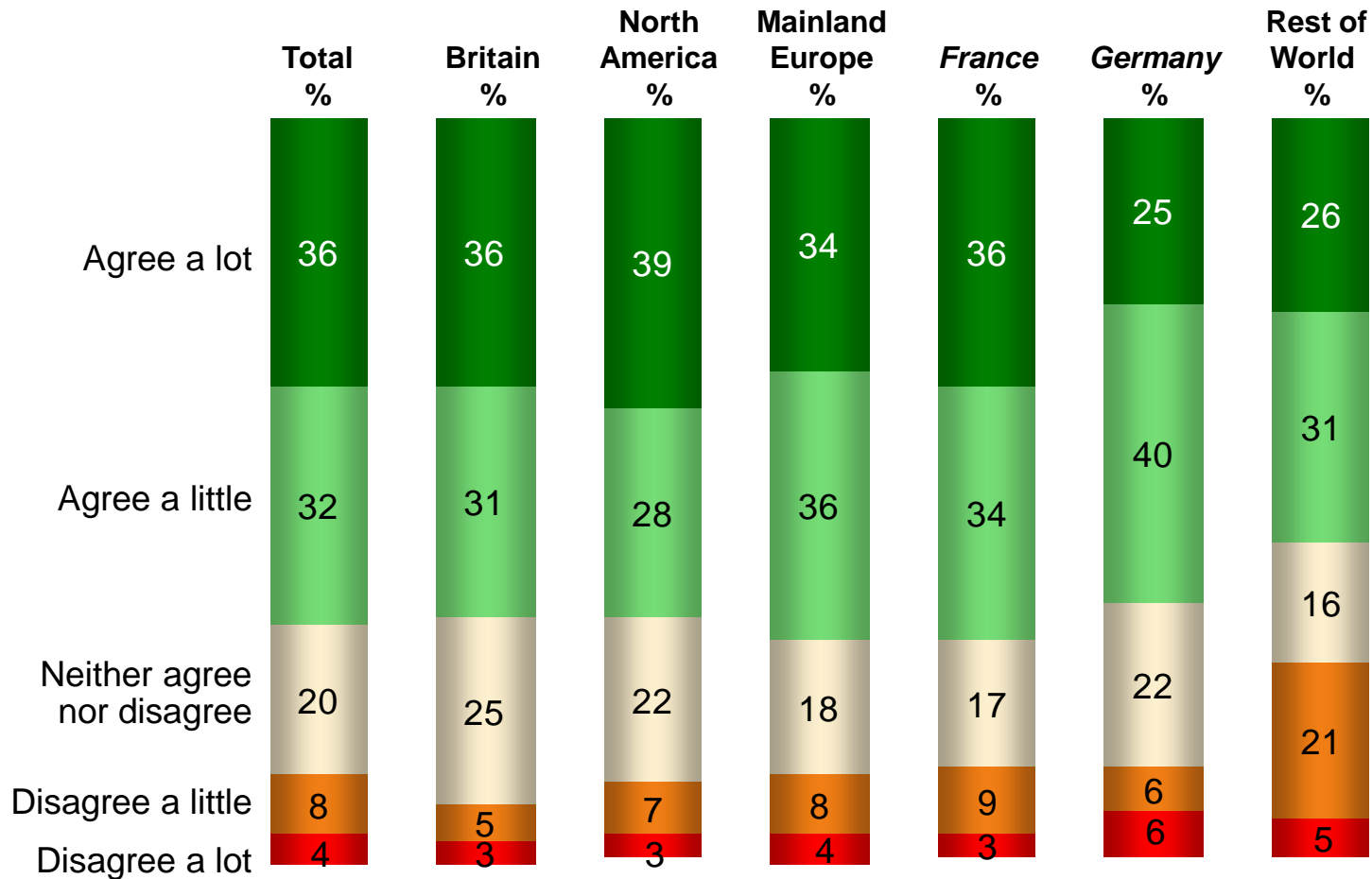
'The rural countryside in Ireland shows evidence of littering and/or dumping'



Perceptions of the Urban and Rural Environment

Base: All Giving an Opinion

'Ireland's rivers and lakes are clean and unpolluted'





Fáilte Ireland

National Tourism Development Authority

Visitor Attitudes Survey Main Markets 2010



MillwardBrown
Lansdowne