

Välkomna!

NORDISK KONFERENS OM ANALYS AV TURISM



ANALYS AV BETEENDE, MÅLGRUPP OCH MARKNAD

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Fáilte Ireland

**NORDISK KONFERENS OM
ANALYS AV TURISM**

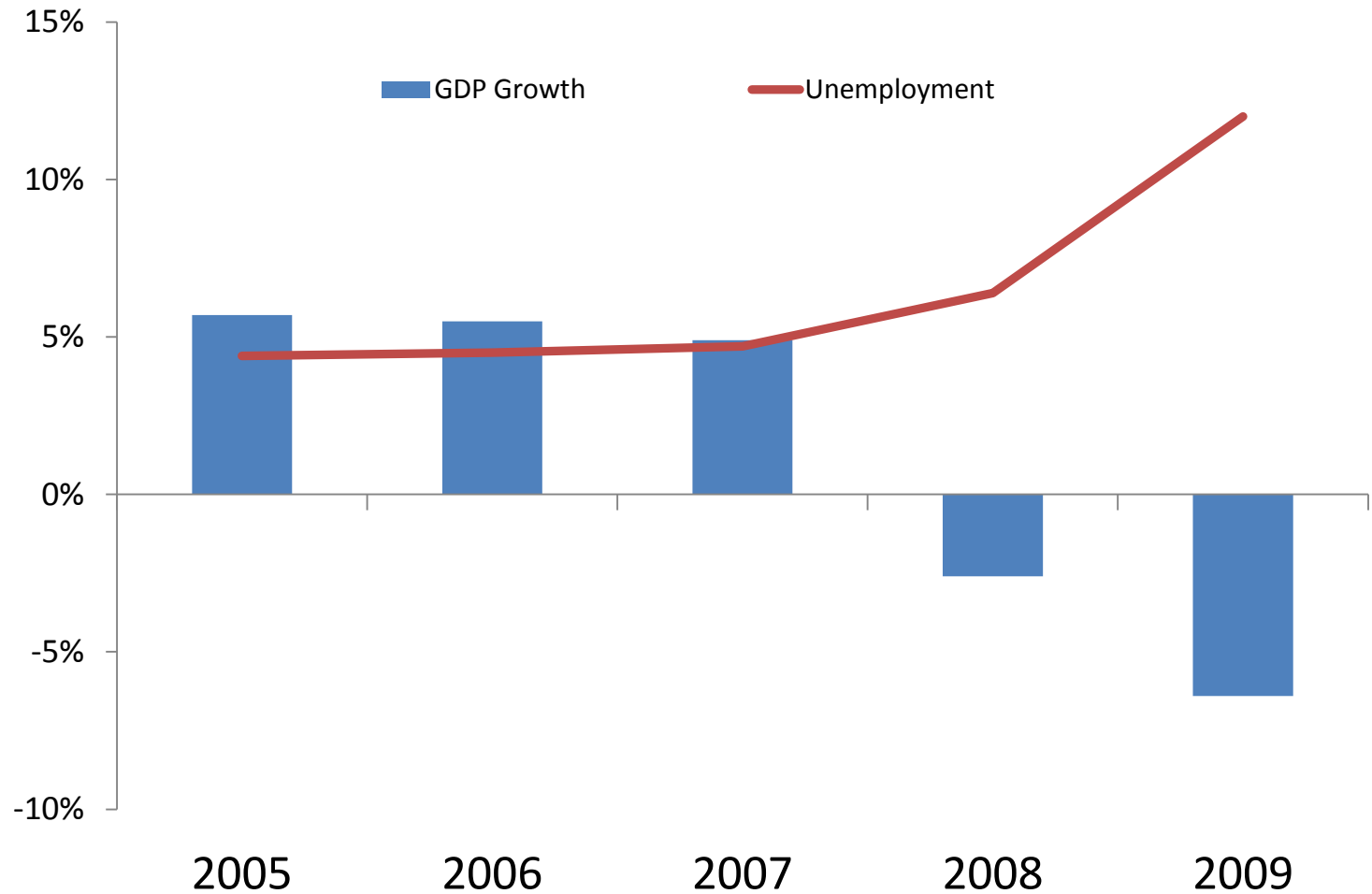


Tourism research in a rapidly changing environment

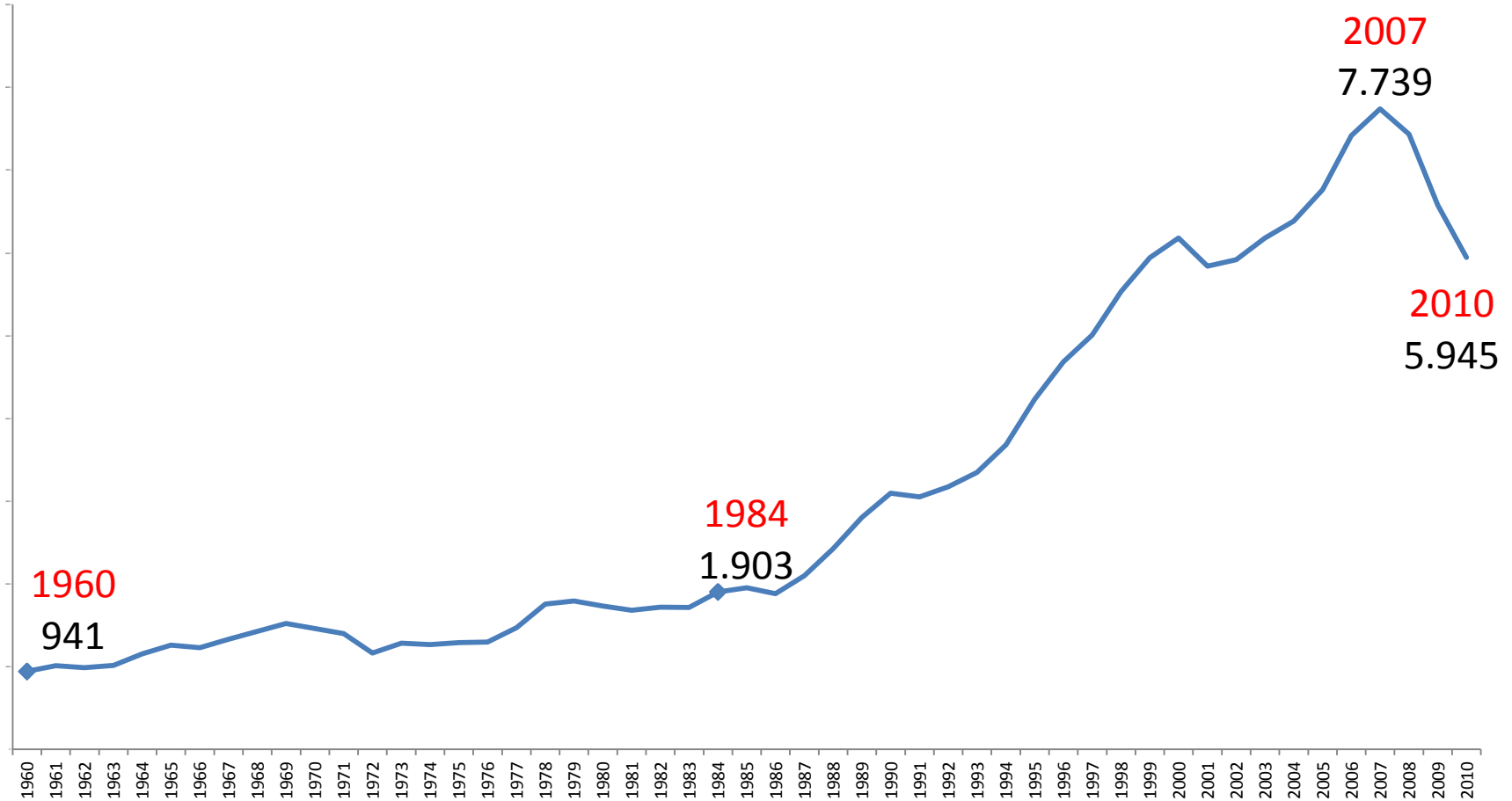
Introduction

- Celtic Tiger
- Deep recession
- Recovery and Growth
- Requirement to respond at strategic level
- How this has driven the research we do and the way we work

Ireland's Economic Performance 2005-2009

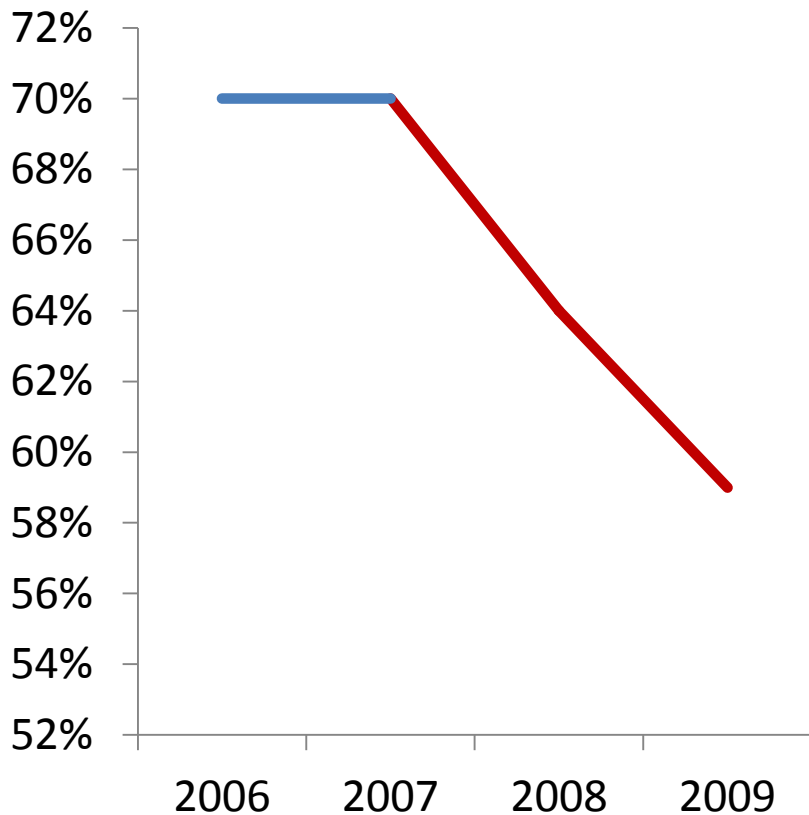


Overseas Tourism (000s) to Ireland 1960-2010

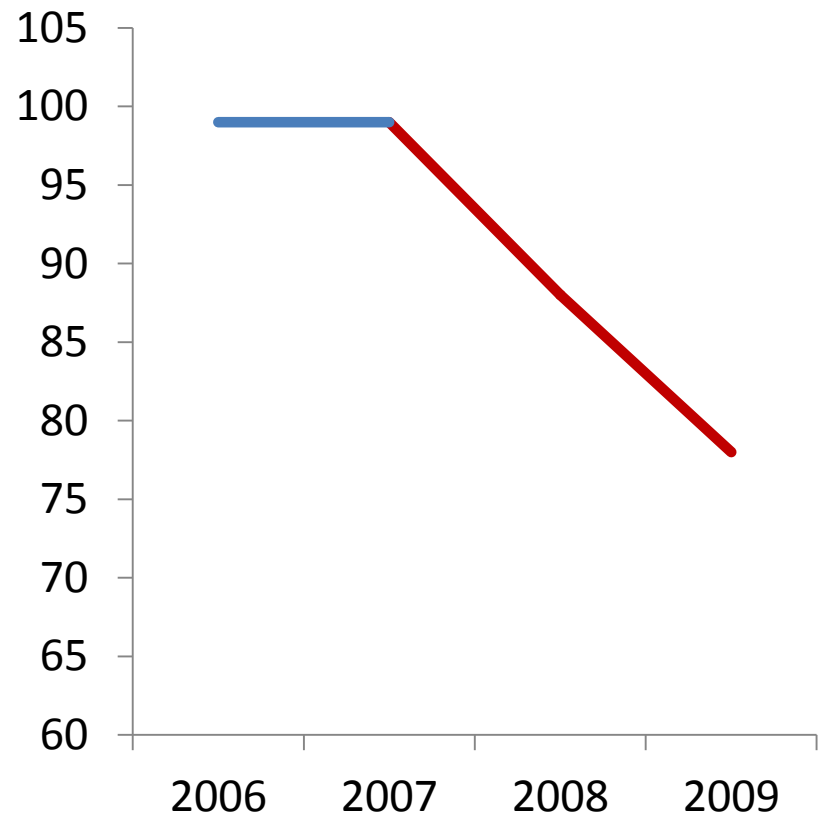


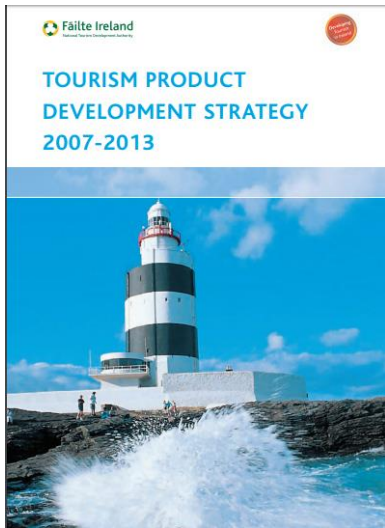
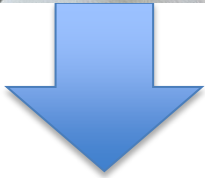
Irish hotel performance 2006-2009

Hotel Room Occupancy



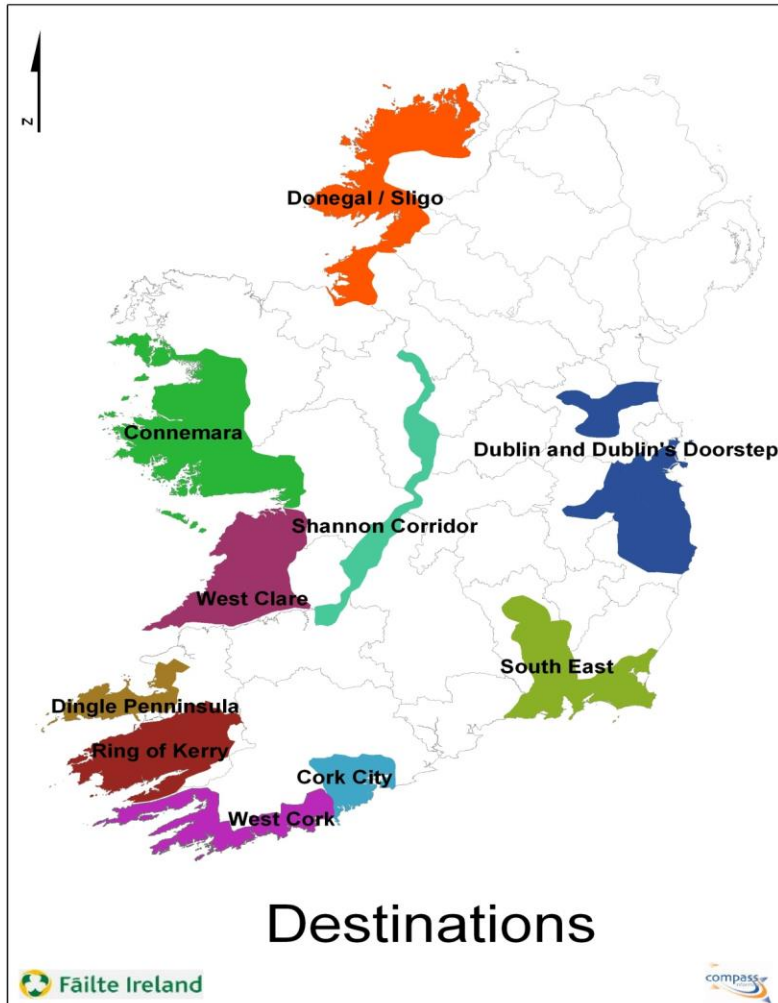
Average Daily Rate €





SURVIVAL!

Response - Survival



- Identify
- Focus
- Maximise

*Destination
Management
Scorecard*

Fáilte Ireland's Destination Matrix

Access & Infrastructure	Sense of Place	Civil Society	Local Government	Public Art
Public Realm	Product Investment	Insight & Innovation	Enterprise Supports	Food & Accommodation
Litter	Customer Service	Distinctive Destination	Quality & Standards	Culture
Traffic Management	Web e-business Social Media	Marketing	Business Advice	Sports GAA
Public Order	Festivals & Events	Landscapes & Streetscapes	(Business) Chamber of Commerce	Water & Air Quality

Destination Management Scorecard

- Framework for destinations
- Based on VICE model
- KPI's divided into 7 categories
- Meeting the needs of stakeholders



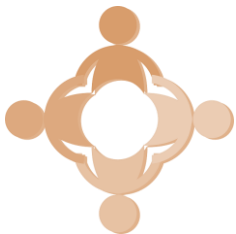
Infrastructure



Tourism
Infrastructure



Visitor



Community



Business



Environment



Administration

The challenge for the Community Survey: establish common, identifiable societal factors across disparate locations

Factors

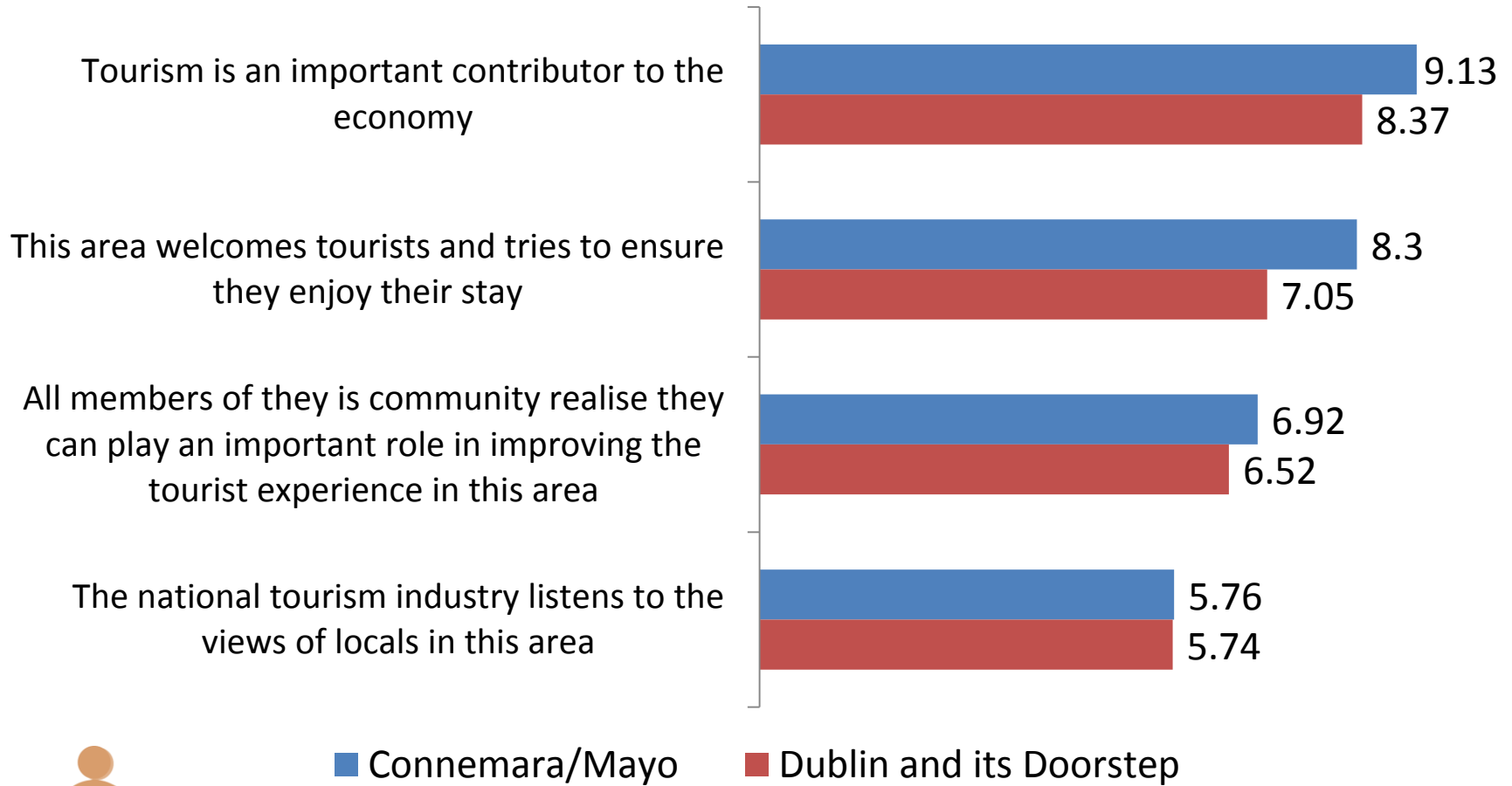
- Location
- Dependence on tourism
- Employment levels
- Employment opportunities
- Local infrastructure
- Local amenities

Solution

- Telephone survey of local residents
- Selected set of 4 simple statements:
 - Contribution of tourism to local economy
 - Local area's welcome to tourist
 - Personal responsibility for the tourist experience
 - Sense of consultation by the tourism industry



Sample Results



The challenge for the Visitor Survey: get relevant, timely *visitor* feedback at a *micro* level

Old approach - top down

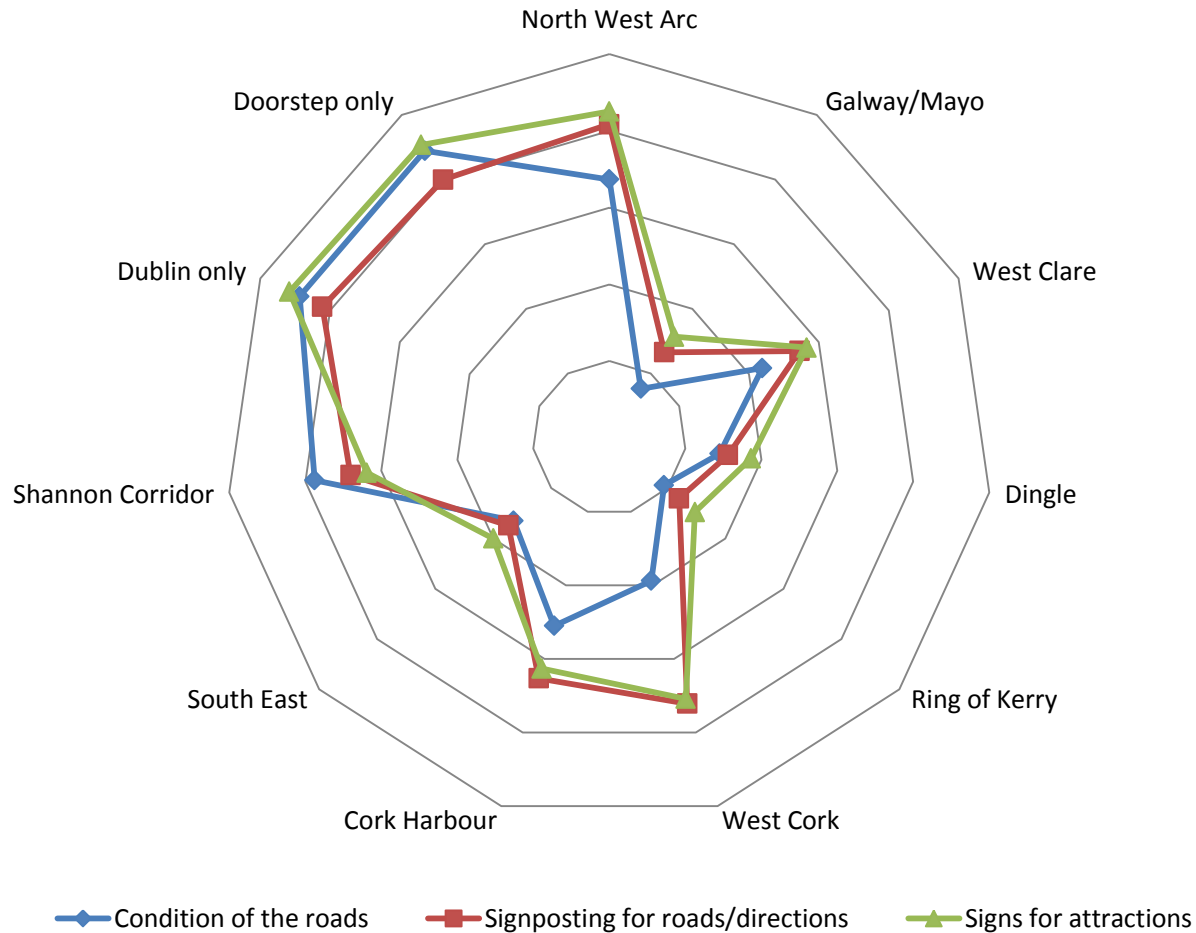
- Self-completion at ports
- Perceptions of Ireland
- Broad brush strokes
- Looking back (full holiday experience)
- Extensive historical database

New approach – bottom up

- Interviews in destinations
- Perceptions of local areas
- Detailed pen picture
- In the present (partial experience)
- No historic comparability
- Benchmarking against other destinations.

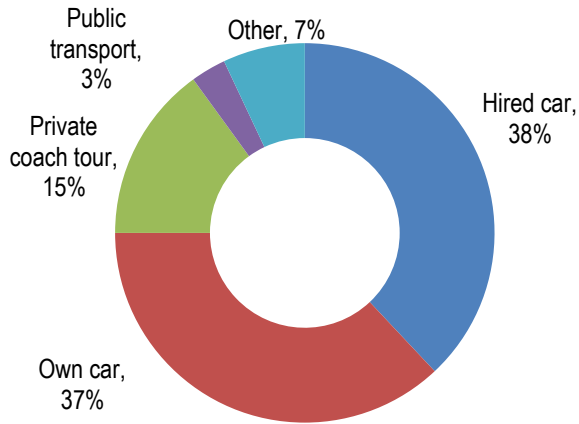


Holidaymaker perceptions of roads



Holidaymaker Study - Ring of Kerry Results

How did they get around the Ring of Kerry?

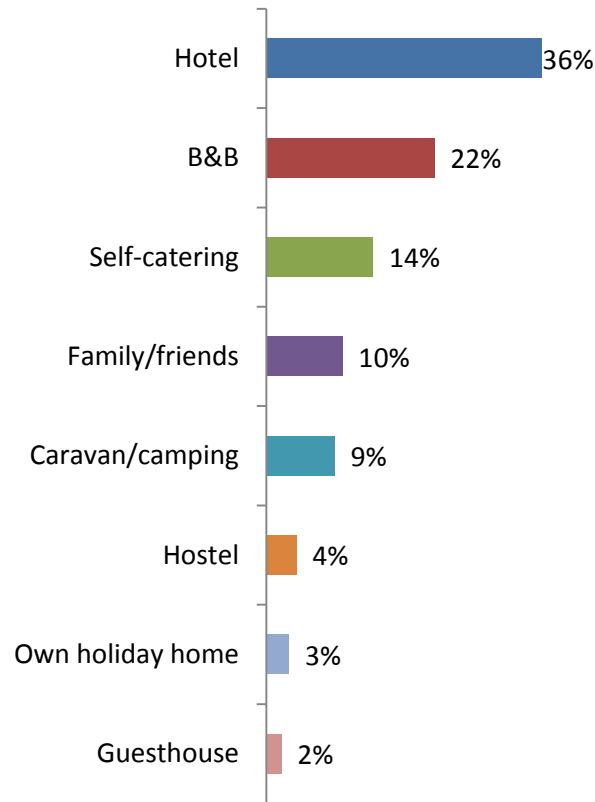


What was their experience of getting around the Ring of Kerry?

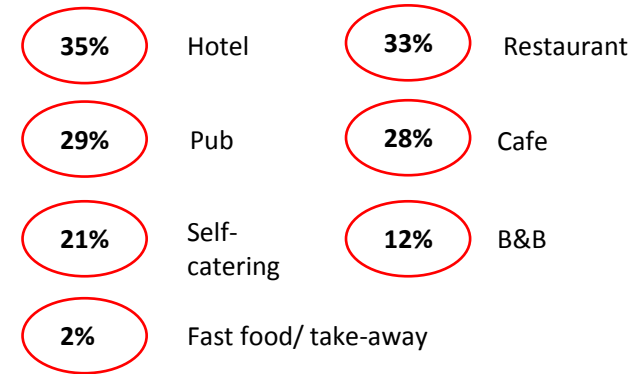
Transport to/from the Ring of Kerry	4.18
Transport within the Ring of Kerry	4.08
Signs for attractions	4.03
Signposting for roads/directions	3.97
Condition of the roads	3.71

Average score: 1 = very poor 5 = very good
Re-weighted to exclude "No opinion"

Where did they stay on the Ring of Kerry?



Where did they eat on the Ring of Kerry?

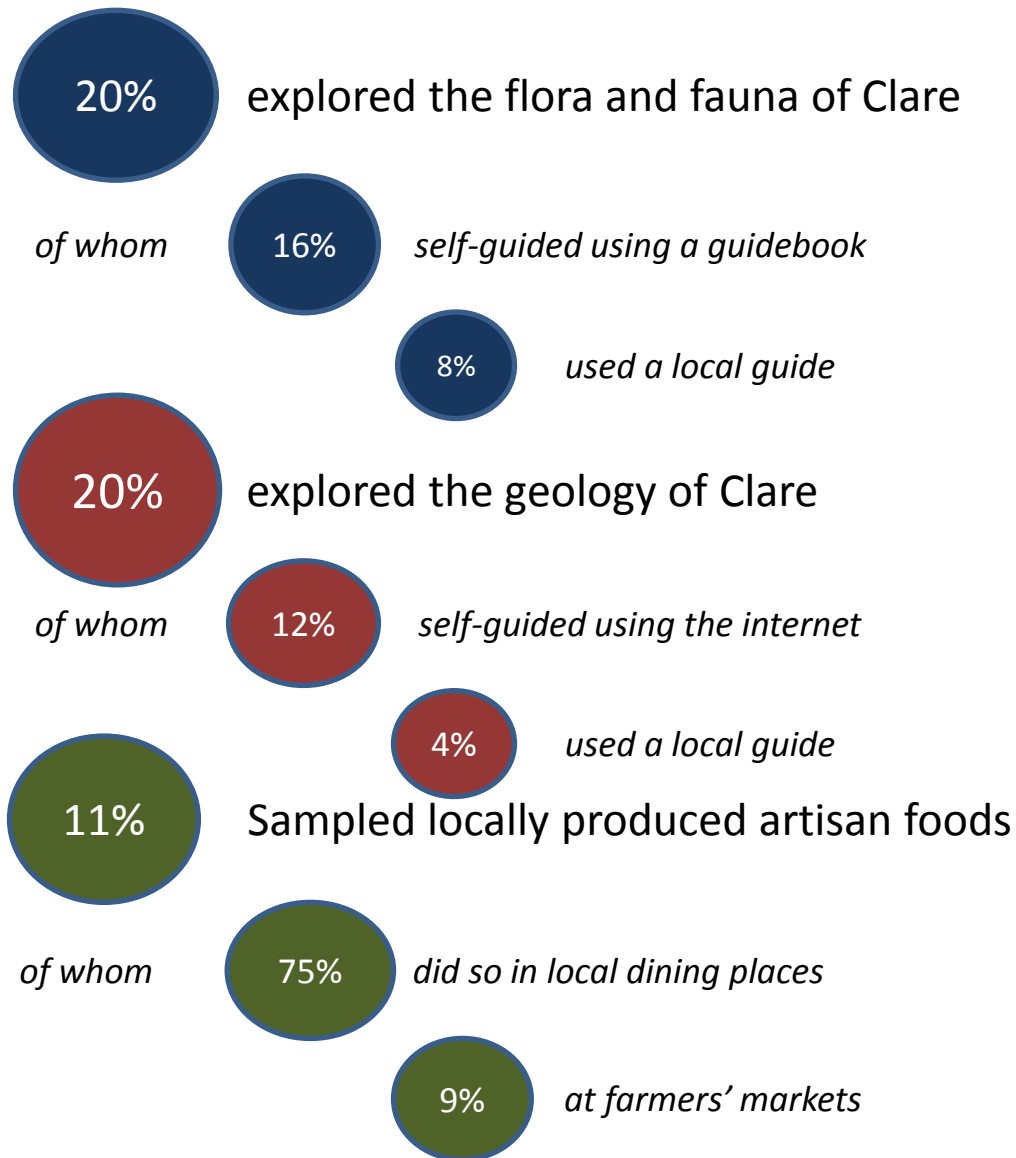


What did they think of eating out on the Ring of Kerry?

Way in which food was prepared	56%
Service	50%
Quality and freshness of ingredients	49%
Staff knowledge of menu	45%
Availability of distinctly Irish dishes	44%
Value for money	25%

Those giving a "very good" rating of food

Holidaymaker Study - Clare



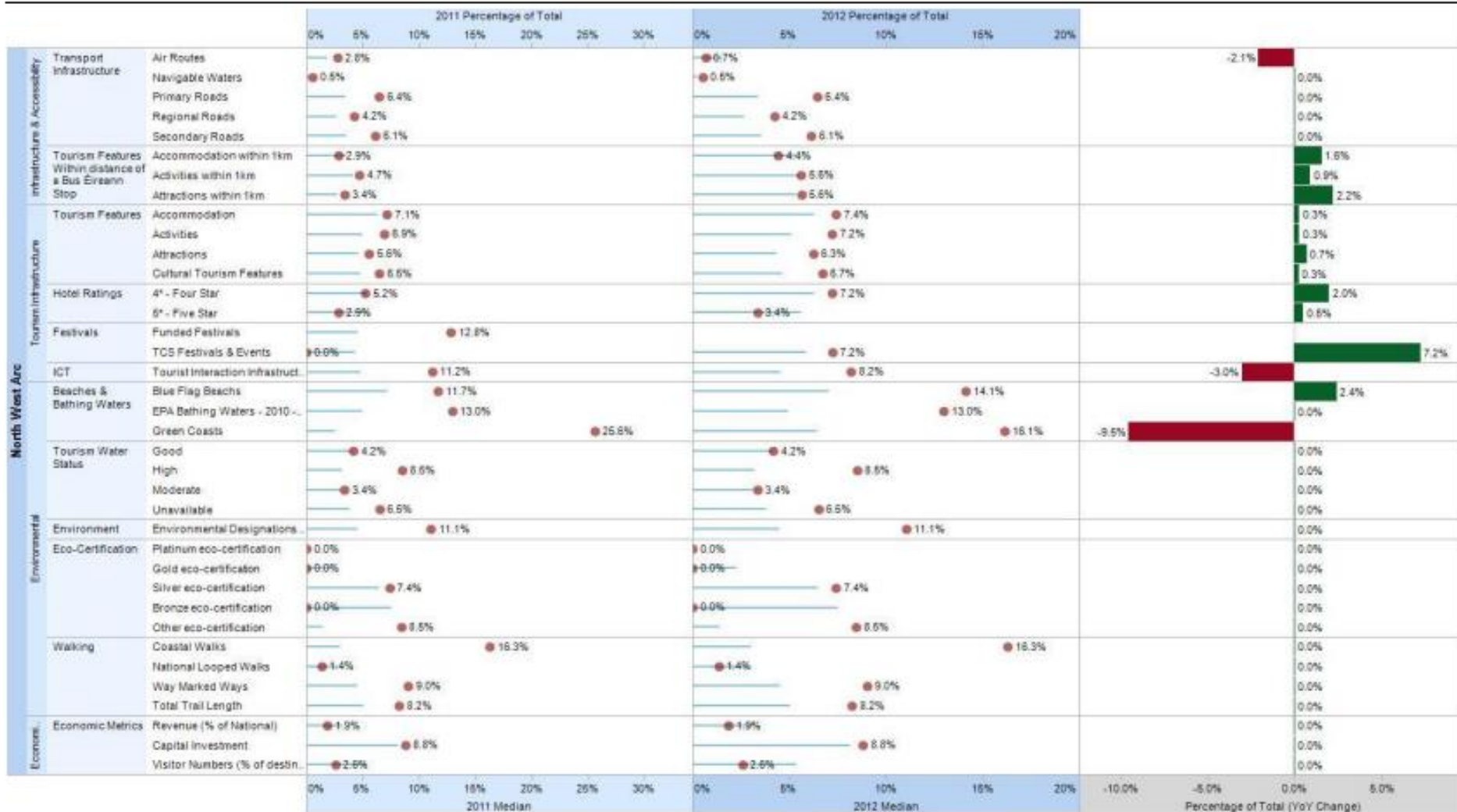
How did we get the information?

WHEN: May-October 2013

WHERE: at key tourist locations throughout Clare.

WHO: 1,028 face to face interviews with domestic and overseas holidaymakers. 67% were first time visitors to the area. They had spent at least one night in the area. More than half were aged between 45-64 years and almost half were couples.

8 Destination Dashboard – North West Arc



Left pane: The red dots are labeled with the 2011 value that represents the percentage of total features in the specific destination. Blue bars represent median value of features per destination. Features are displayed separately for each metric.

Middle pane: The red dots are labeled with the 2012 value that represents the percentage of total features in the specific destination. Blue bars represent median value of features per destination. Features are displayed separately for each metric.

Right pane: Represents the change, year on year, in the percentage values of total features in the specific destination, for each of the metrics represented.

Missing data indicates the unavailability of data for a specific sphere.

Grouping based on predefined hierarchy.



Click on Sign to add text
and place signature on a
PDF File.

This time they're invited

(along with everyone else)



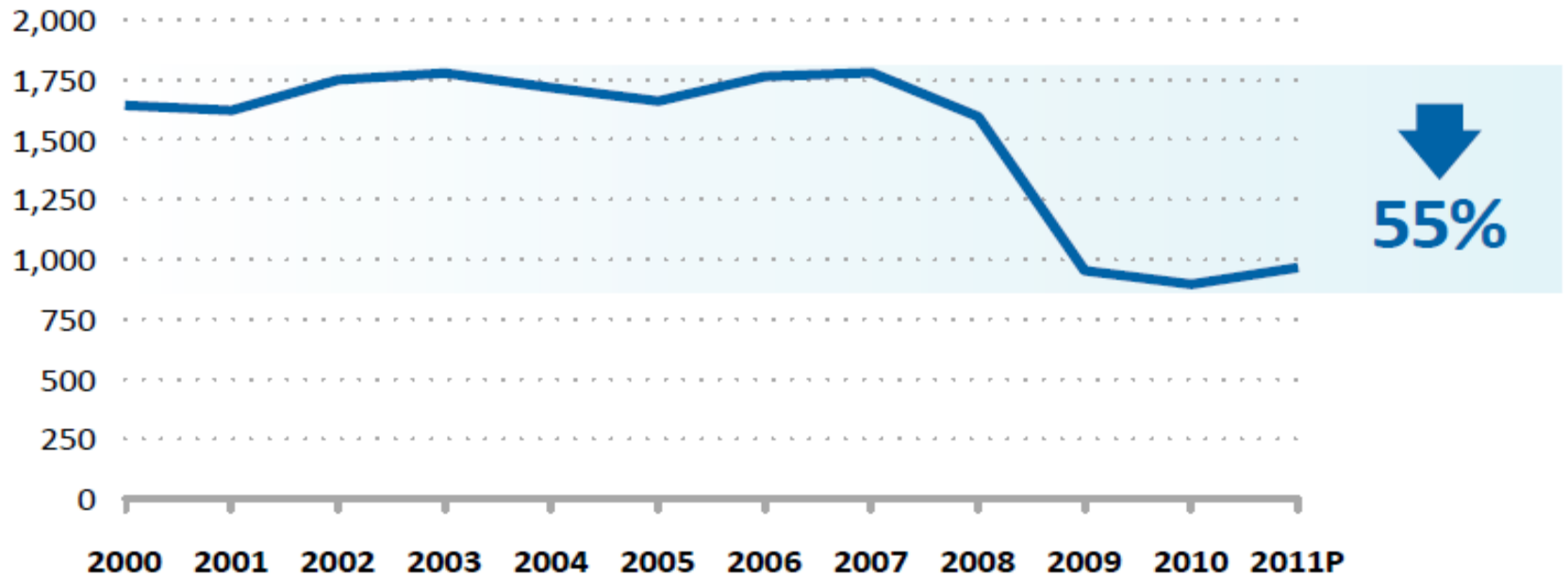
the
gathering

IRELAND 2013

thegatheringireland.com

Project Britain: The Problem

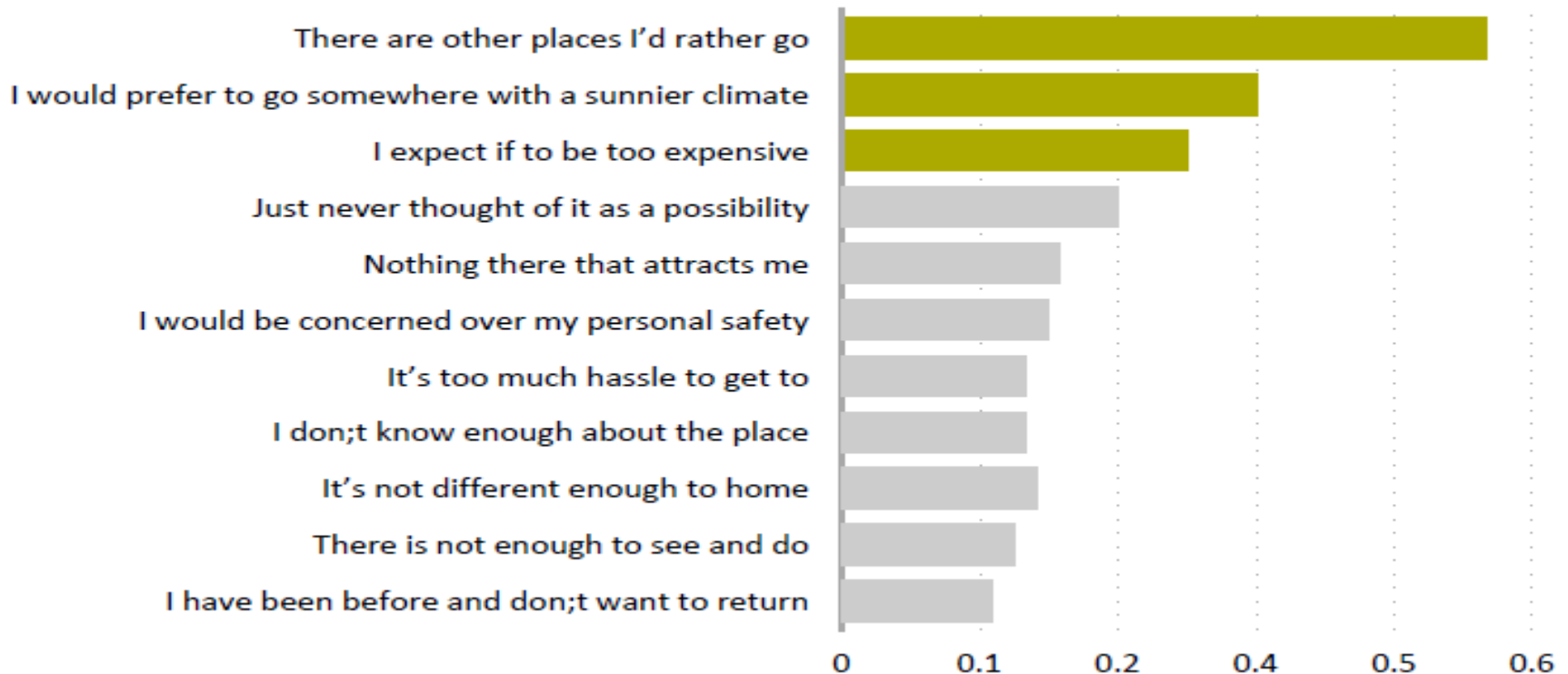
GB HOLIDAY MAKERS TO IRELAND



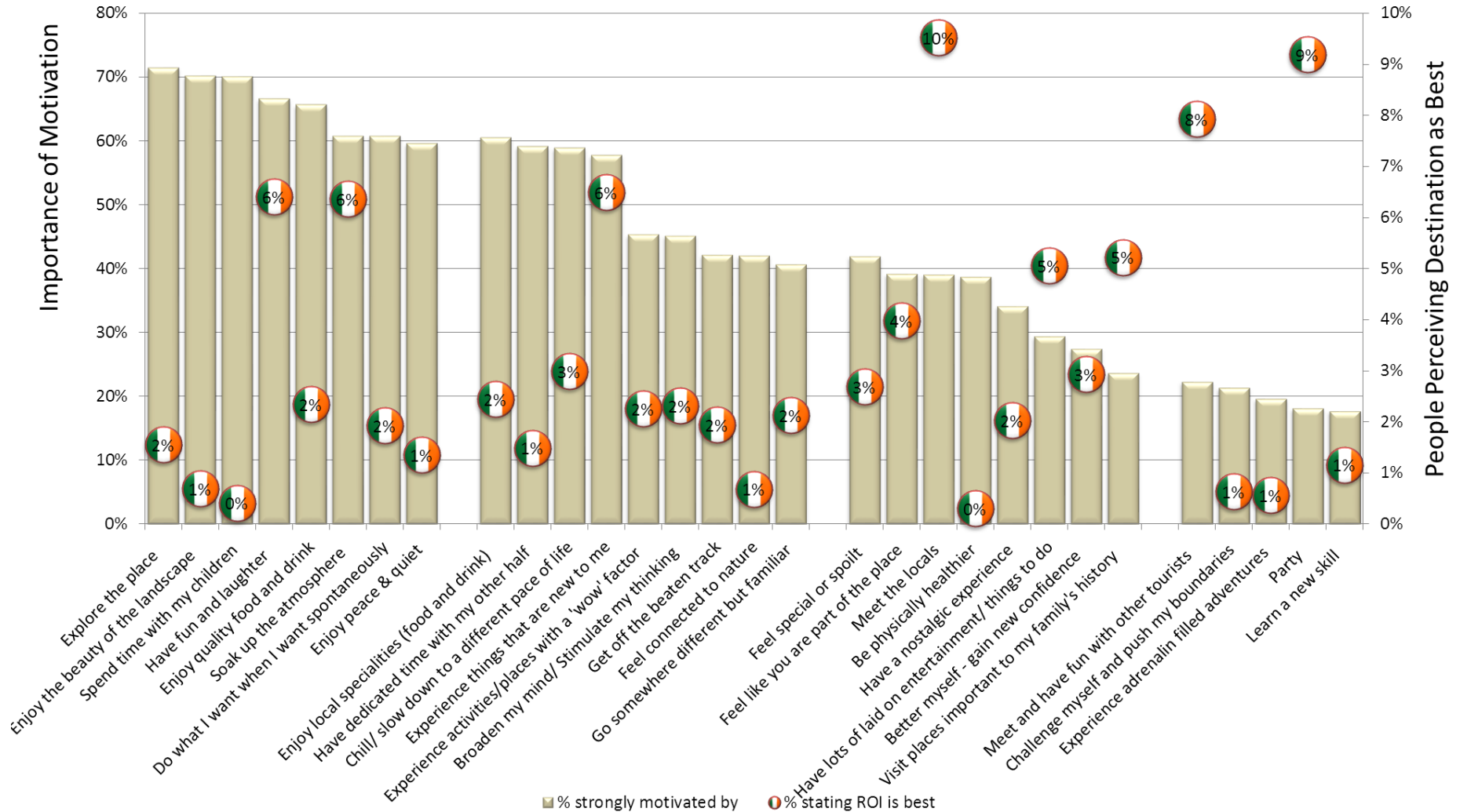
Ireland losing business and market share.

Project Britain: The Why

BARRIERS TO VISITING THE ISLAND OF IRELAND



Project Britain: The Answer



Source: GB Path to Growth, Tourism Recovery Taskforce

Best Prospect Segments

Social Energisers	Culturally Curious	Great Escapers
Looking for: laughter , new experience, explorations, spontaneity, urban	Looking for: authenticity , enrichment, discovery , broaden the mind, connect with people, urban/rural	Looking for: to reconnect , quality time, wow moments without the efforts , rural
Don't want: peace and quite	Don't want: to party , 'laid on' activities	Don't want: to make connections with others .
Young (15-34)	Older (45+)	In between (30-40)
Groups and couples	Couples	Couples, some with young children

GB Umbrella Masterbrand

Values Ireland delivers:
authenticity, stimulation, engaging people, diverse experiences

Holidays on the Island of Ireland

**Vibe of
the City**

**Living
Historical
stories**

**Awakening
the Senses**

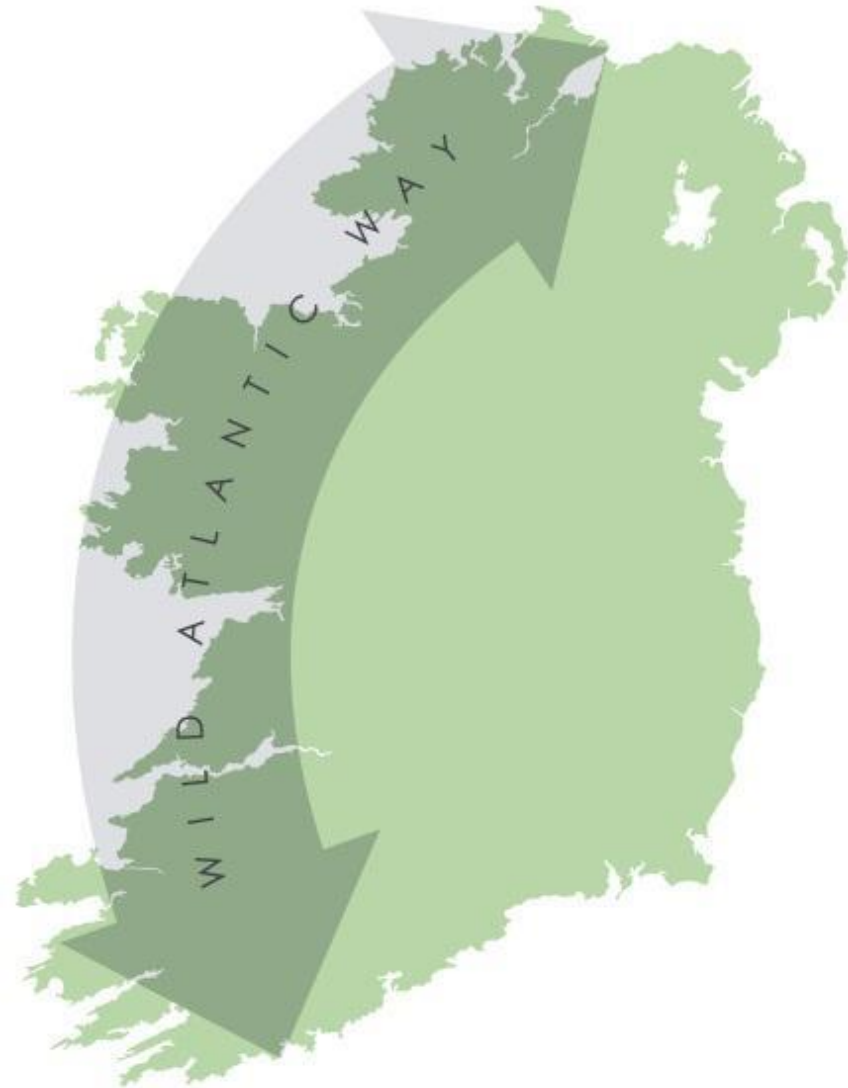
**Getting
Active in
Nature**

**The
Undiscovered
Northern
Ireland**

Geography

Type of holiday: e.g. Weekend break

The Wild Atlantic Way





Tourism and the local community: 8 out of 10 respondents acknowledge the role of local residents in tourism in their local area, however only 5 in 10 feel the tourism industry listen to the views of locals.

Base: All Who Live Within Region (n=226)



TOURISM AND THE LOCAL COMMUNITY

People in this area realise they can play an important role in improving the tourist experience in the area %

This area welcomes tourists and tries to ensure they enjoy their stay %

Tourism is an important contributor to the local economy %

The tourism industry listens to the views of locals in this area %

Strongly Agree (9+10)

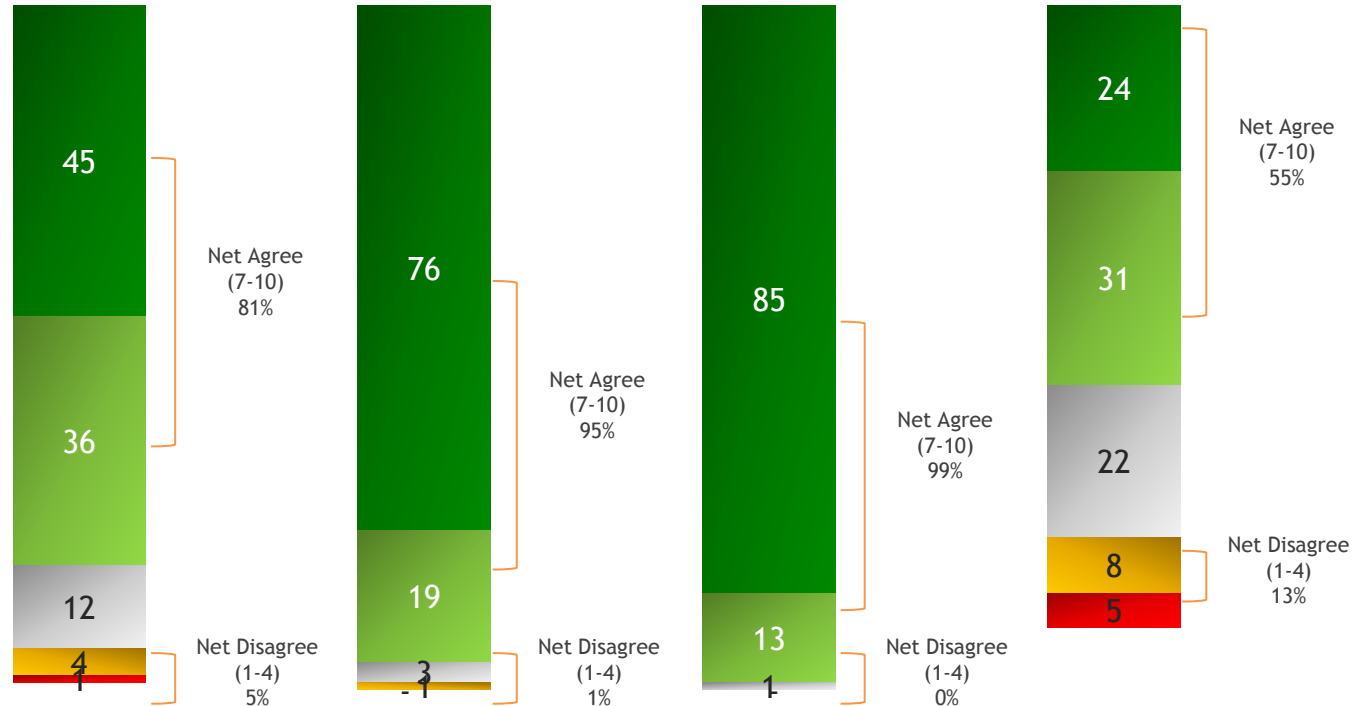
Agree (7+8)

Neither (5+6)

Disagree (3+4)

Strongly disagree (1+2)

Don't know



2011 Mean	7.06	8.23	8.89	5.90
2015 Mean	8.14	9.13	9.48	6.85



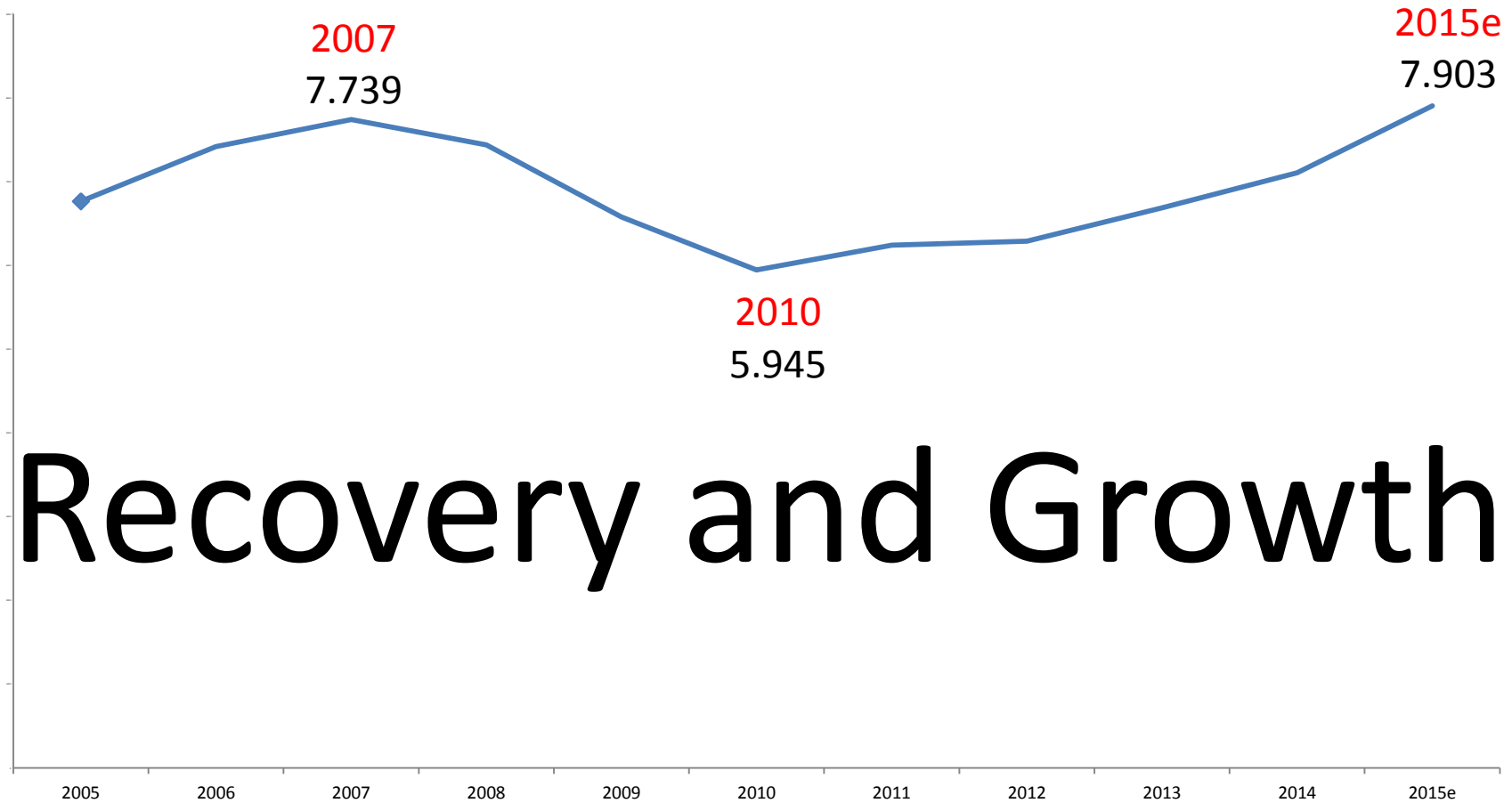
Dublin
*A Breath of
Fresh Air*

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**IRELAND'S
ANCIENT EAST**



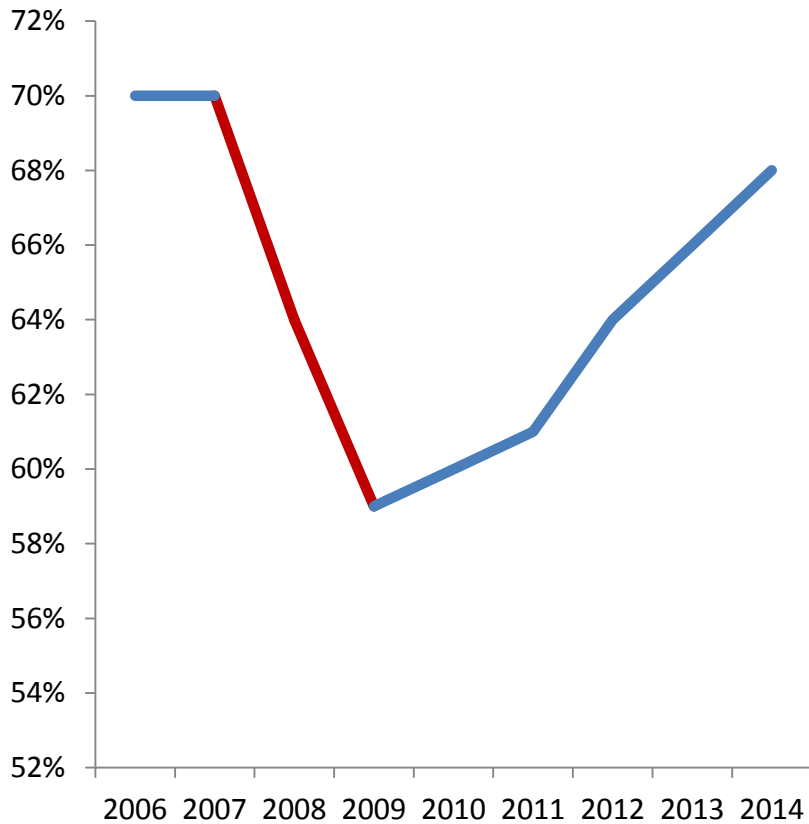
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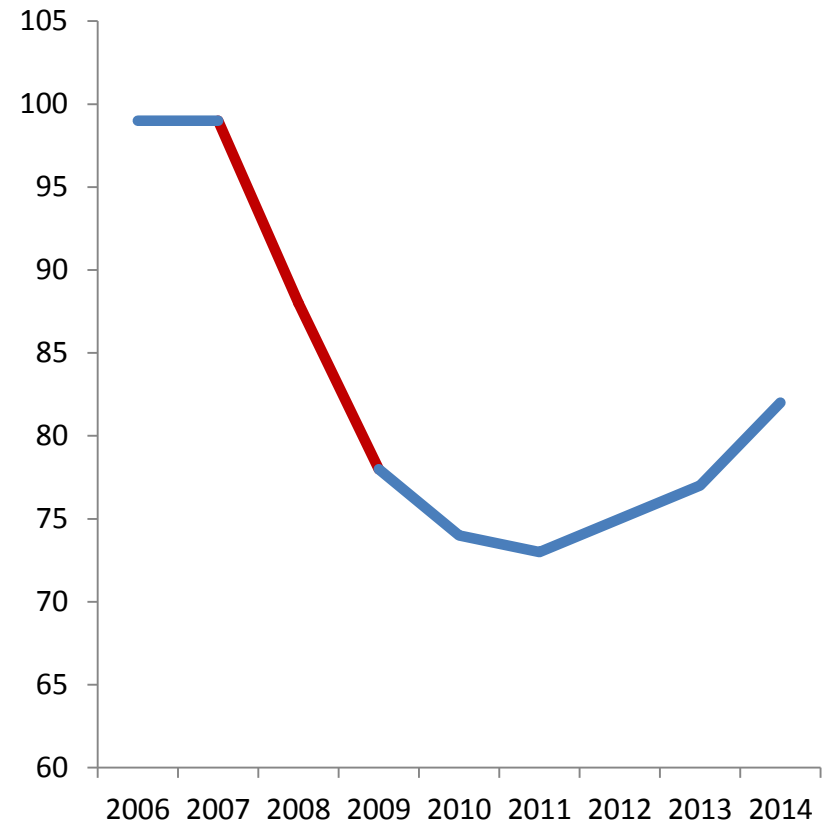
Recovery and Growth

Irish hotel performance 2006-2014

Room Occupancy



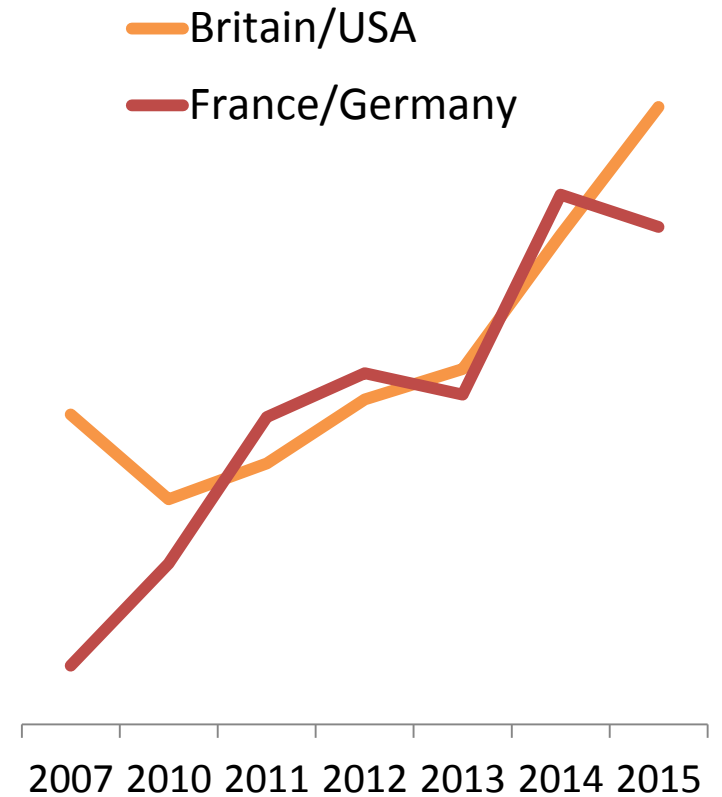
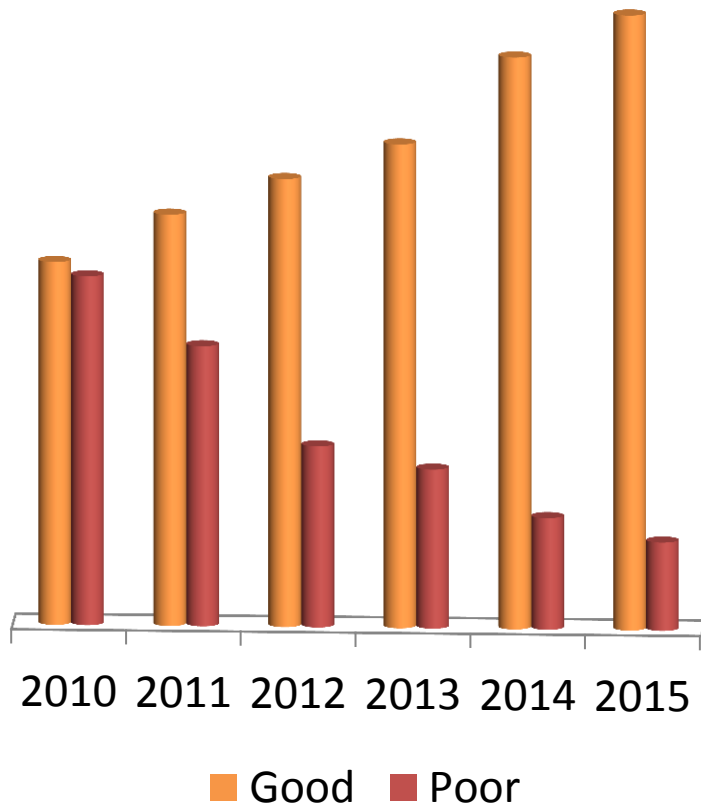
ADR €



What have we learnt so far?

- Bottom up research works for us – the lego block approach
- Evidence based resource allocation
 - For ourselves
 - For others
- The power of influence and collaboration

Value for money



Future Shocks...



Thank you