

Celtic Routes Research

September 2018

Bluegrass Research

in partnership with Blue Sail



Objectives

Understand short break / holiday behaviour and preferences

*

Measure awareness and perceptions of Celtic Routes area as a holiday destination

*

Test propositions: relevance, appeal, extent to which they motivate



METHODOLOGY

10 minute quantitative survey

867 responses

ONLINE SURVEY

Sourced via consumer panel

725 interviews

FACE-TO-FACE SURVEY

**Undertaken on Stena Ferries
from Holyhead to Dublin and
Fishguard to Rosslare**

142 interviews

All regularly choose different destinations for short breaks / holidays

All have visited Wales and or Ireland, or open to visiting in the future

All go on short breaks / holidays within UK at least every 2 years

All to belong to one of 3 target segments



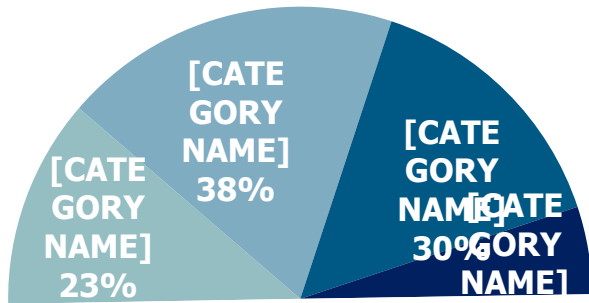
The Segments

Cultural; Active; Families

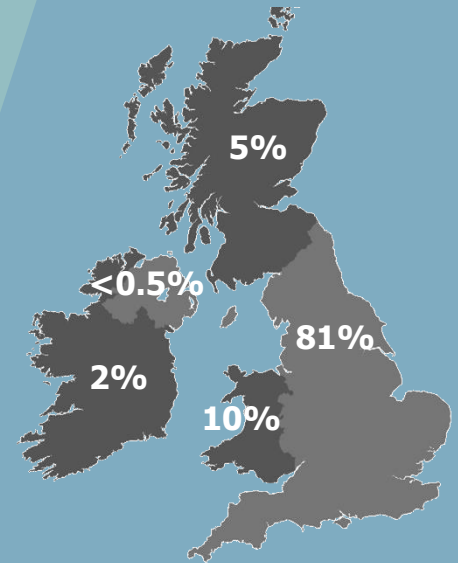
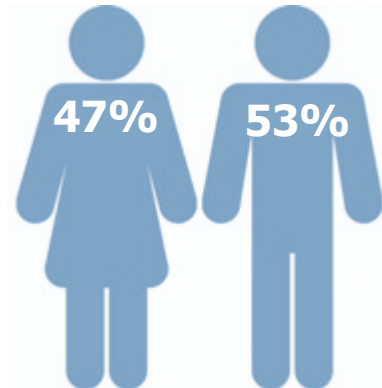
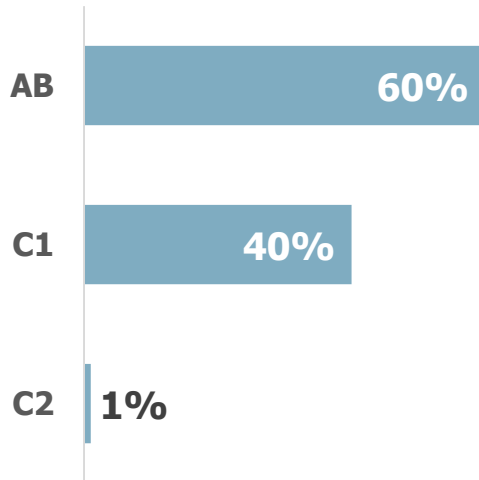


CULTURAL

base 259



~~Kids at home~~

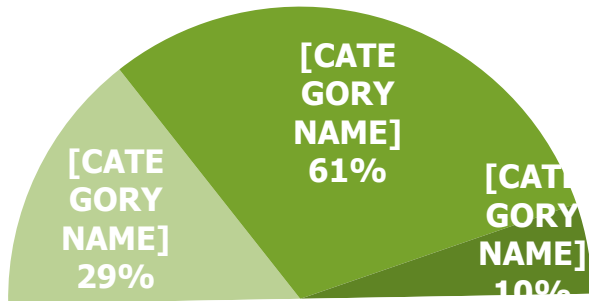


- 1 Like to learn about local way of life and culture of the places they visit
- 2 Agree that the historical sites and attractions of an area are important

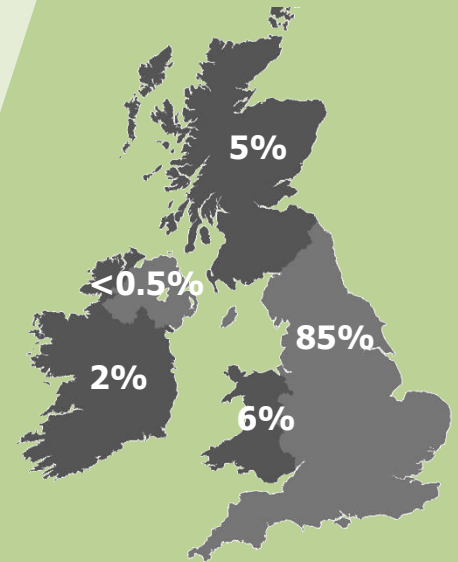
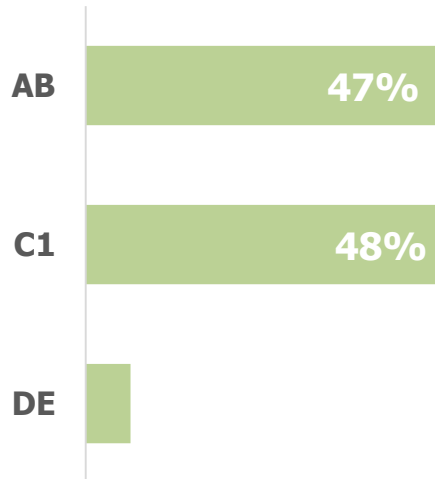


ACTIVE

base 239



~~Kids at home~~



- 1 Enjoy activity based holidays / short breaks
- 2 Want somewhere they can get outdoors and enjoy beautiful scenery

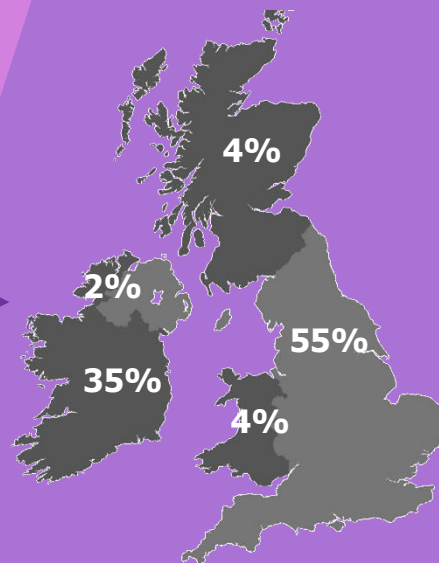
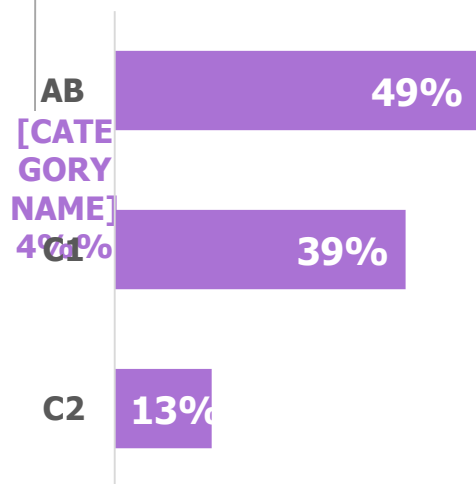
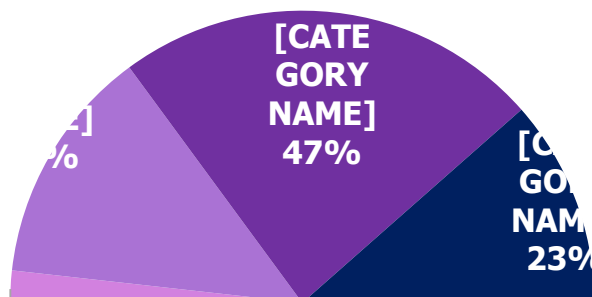


FAMILIES

base 369

INCLUDED BOOST OF
125 FAMILIES FROM IRELAND

✓ Kids at home



- 1 Enjoy activity based holidays / short breaks
- 2 Want places that offer lots of things for children to do in all weathers

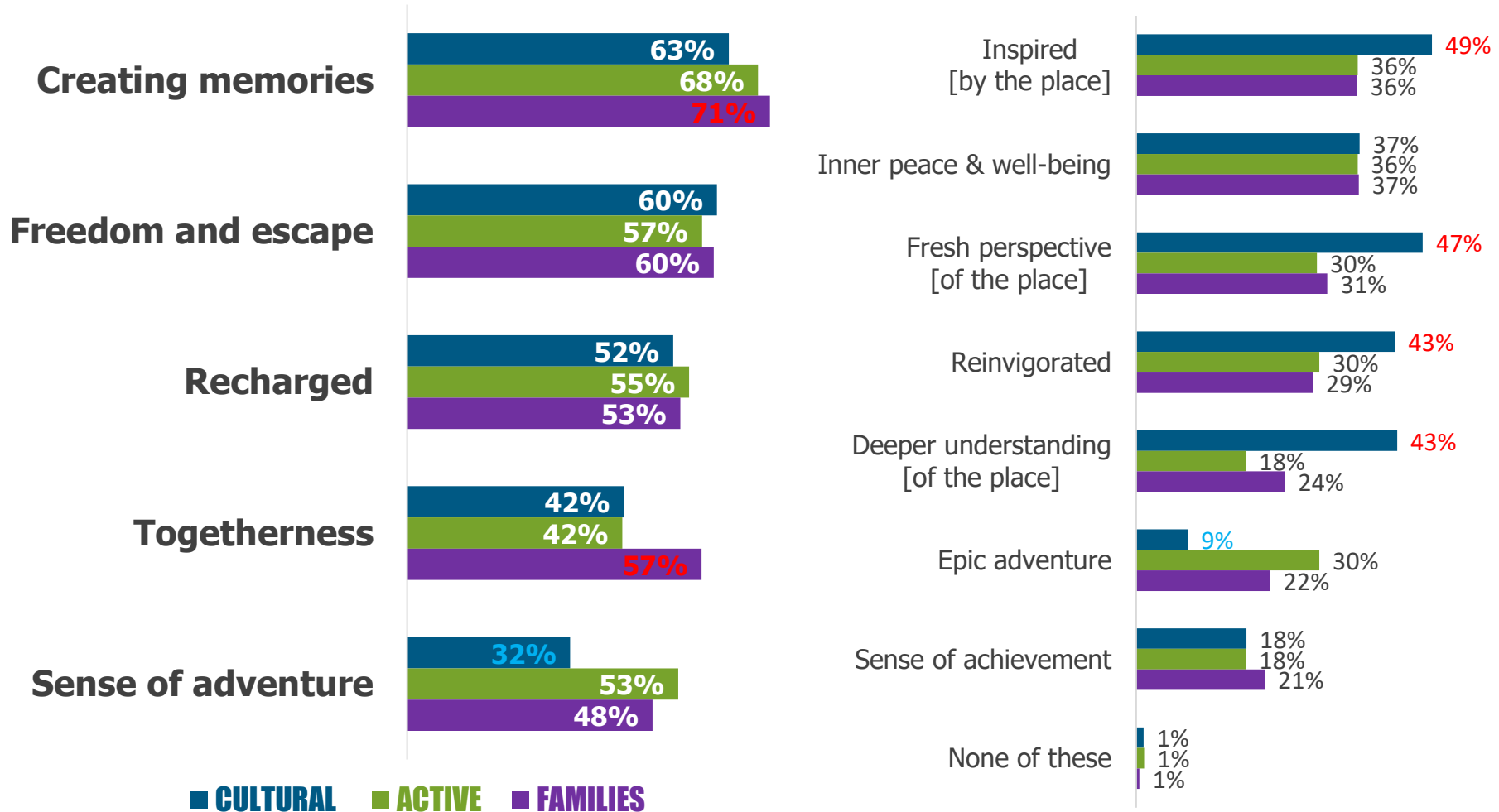


Planning short breaks and holidays

*We'd like to know more about what you want and how you go
about selecting destinations*

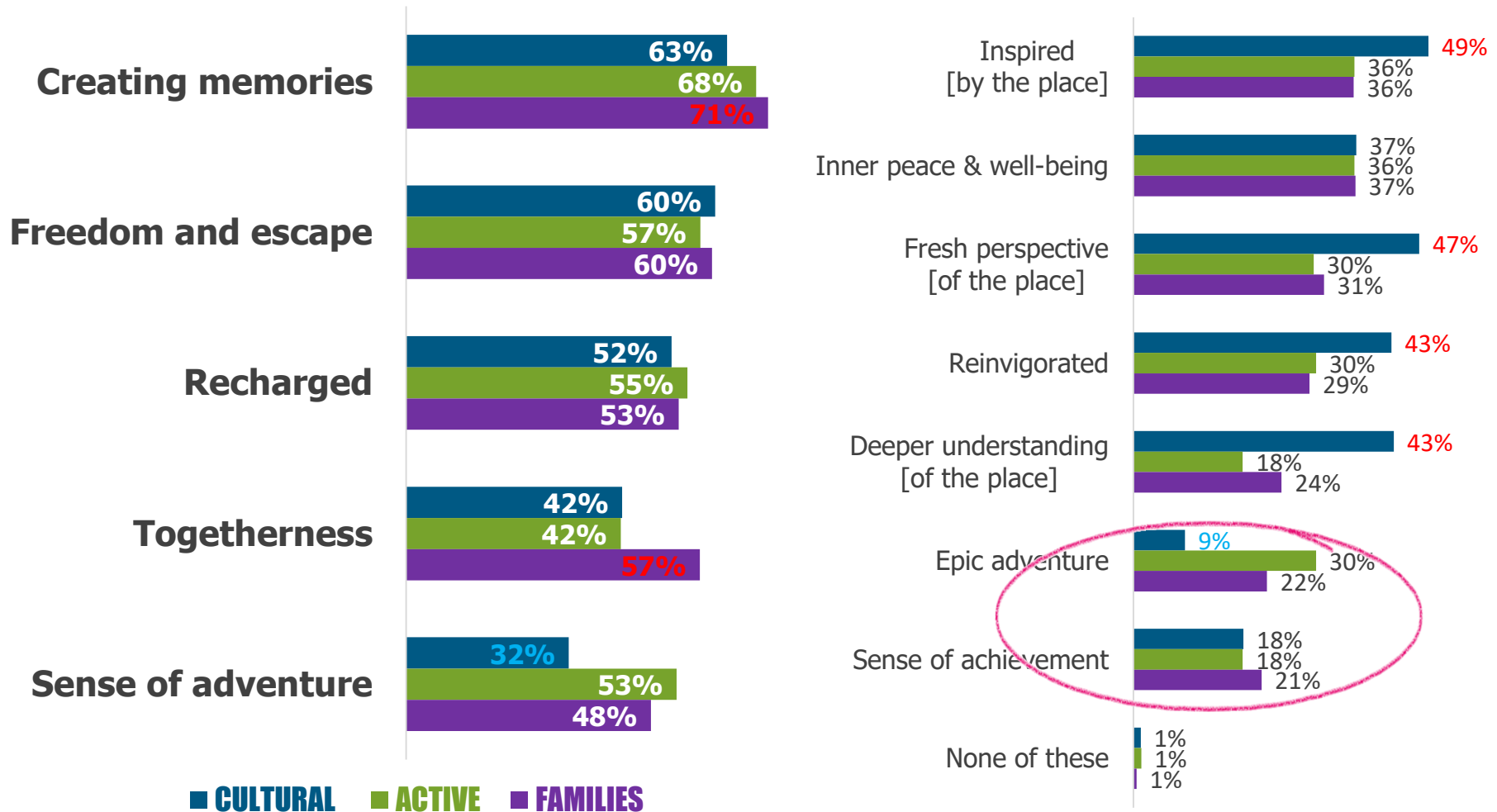
WHAT THEY WANT FROM A SHORT BREAK / HOLIDAY

Segments agree **creating memories** and **freedom / escape** are key aspects



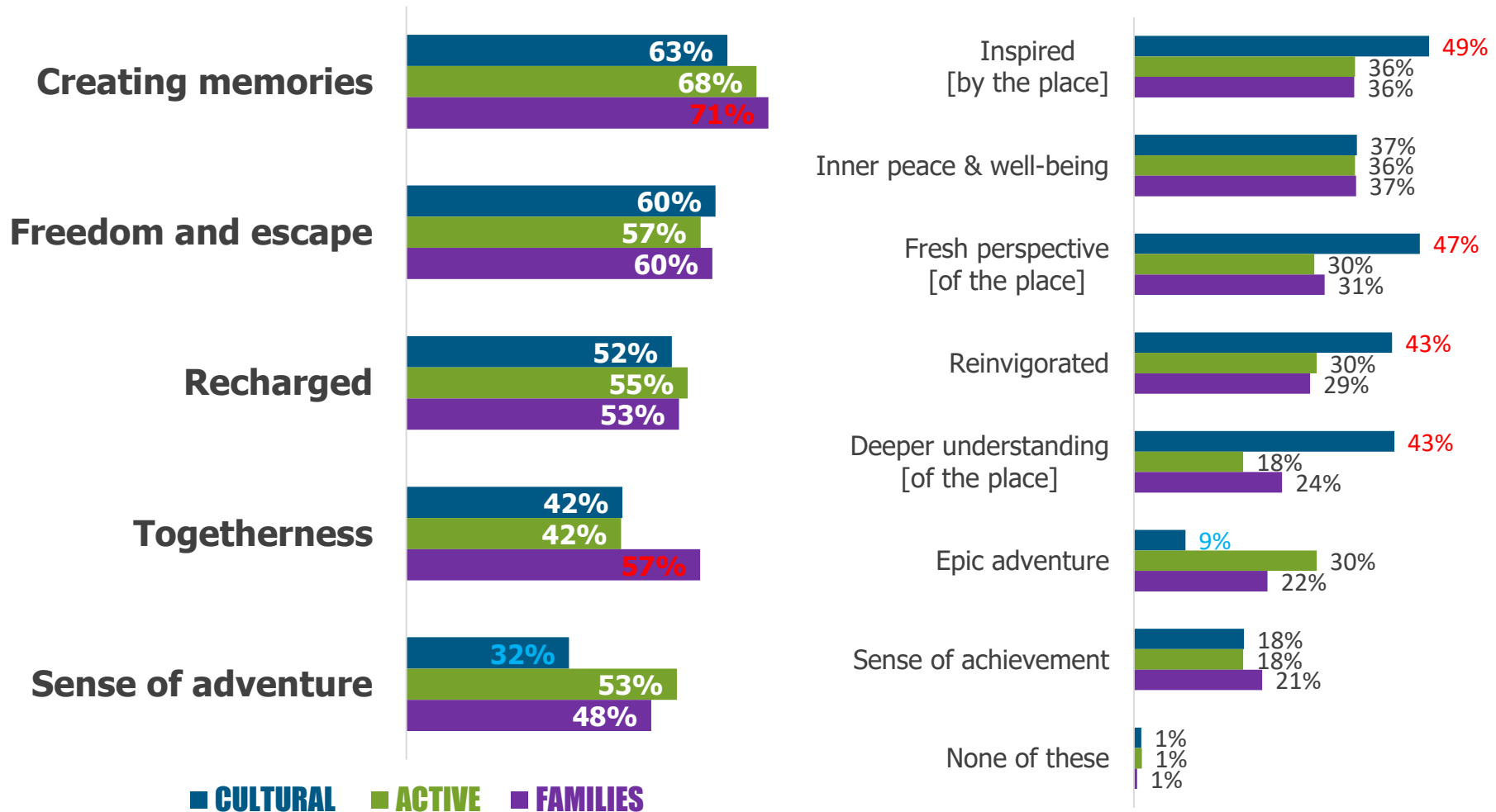
WHAT THEY WANT FROM A SHORT BREAK / HOLIDAY

Interestingly, an 'epic adventure' and sense of achievement doesn't widely appeal



WHAT THEY WANT FROM A SHORT BREAK / HOLIDAY

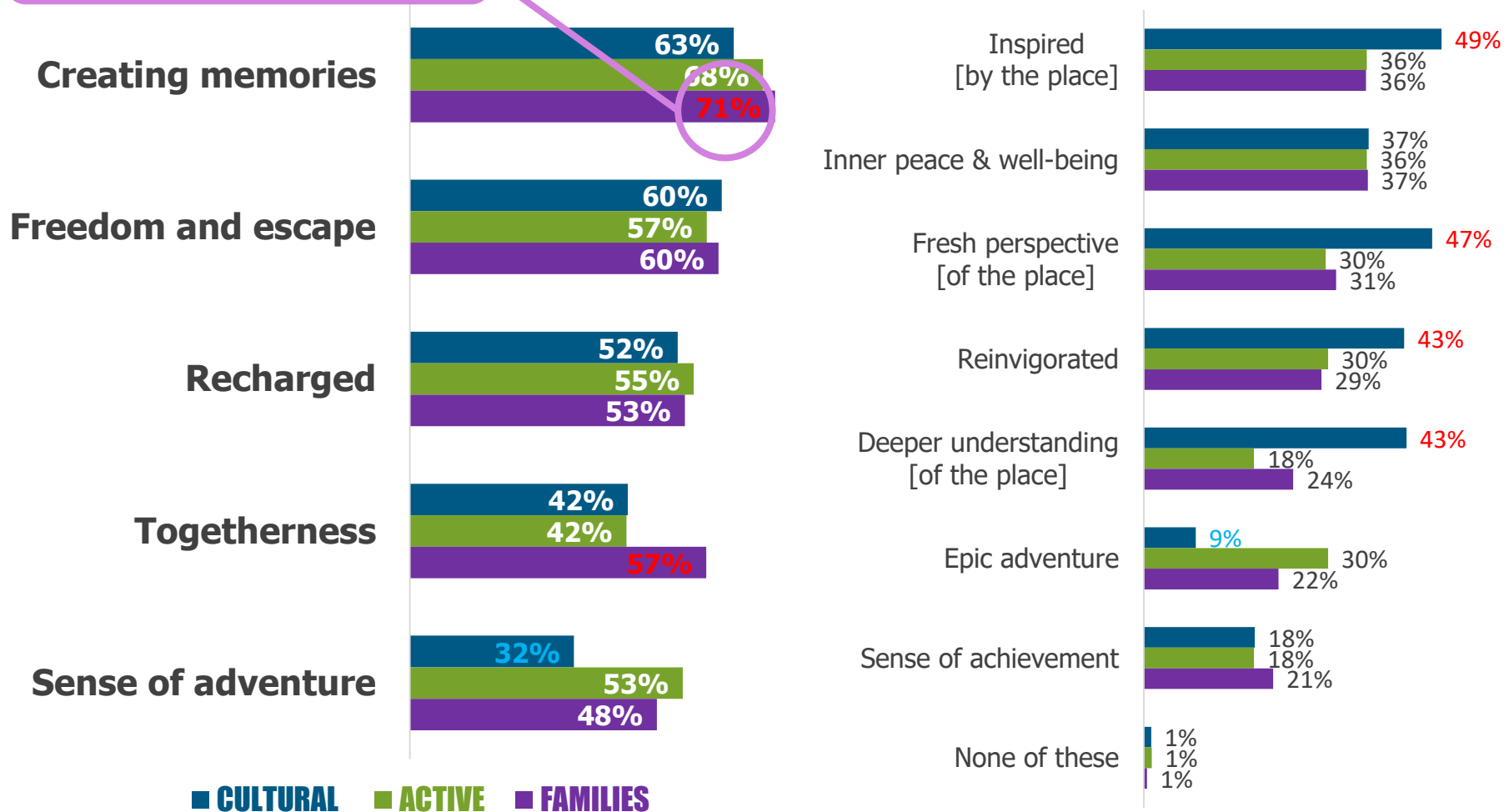
Cultural appreciate broadest set of attributes – but 'adventure' alienates

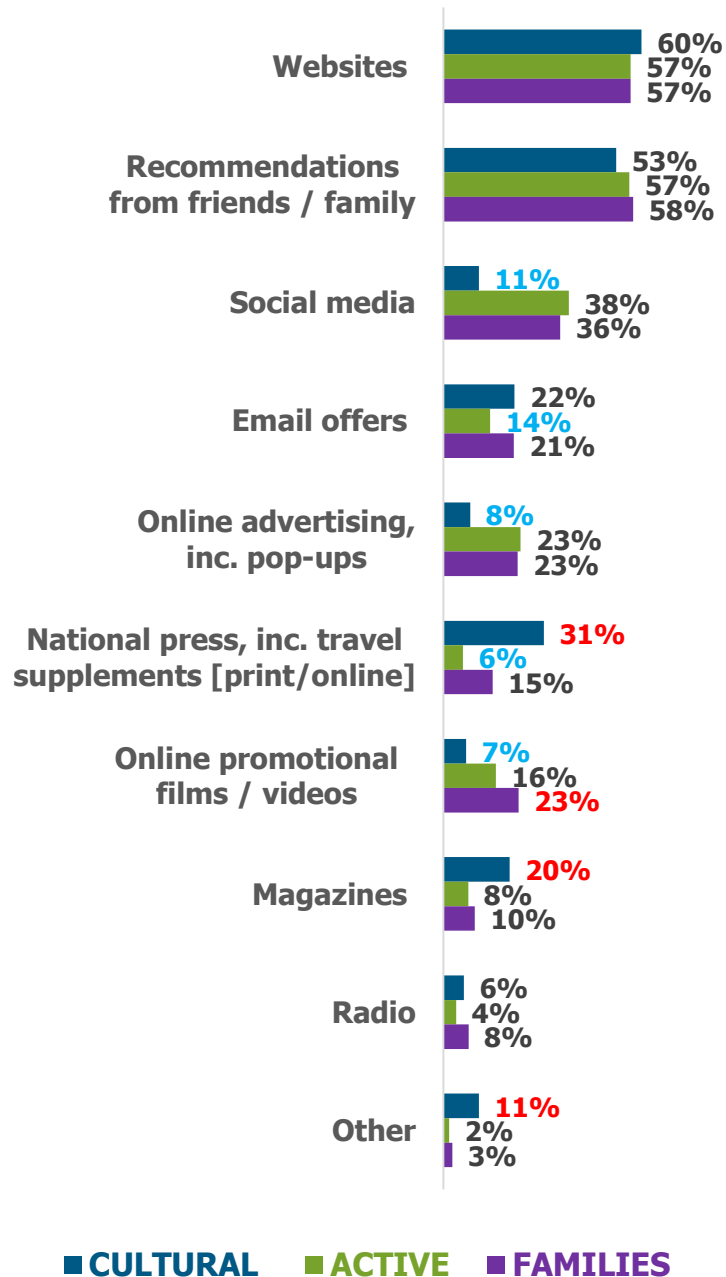


WHAT THEY WANT FROM A SHORT BREAK / HOLIDAY

Memories and togetherness vital to Families

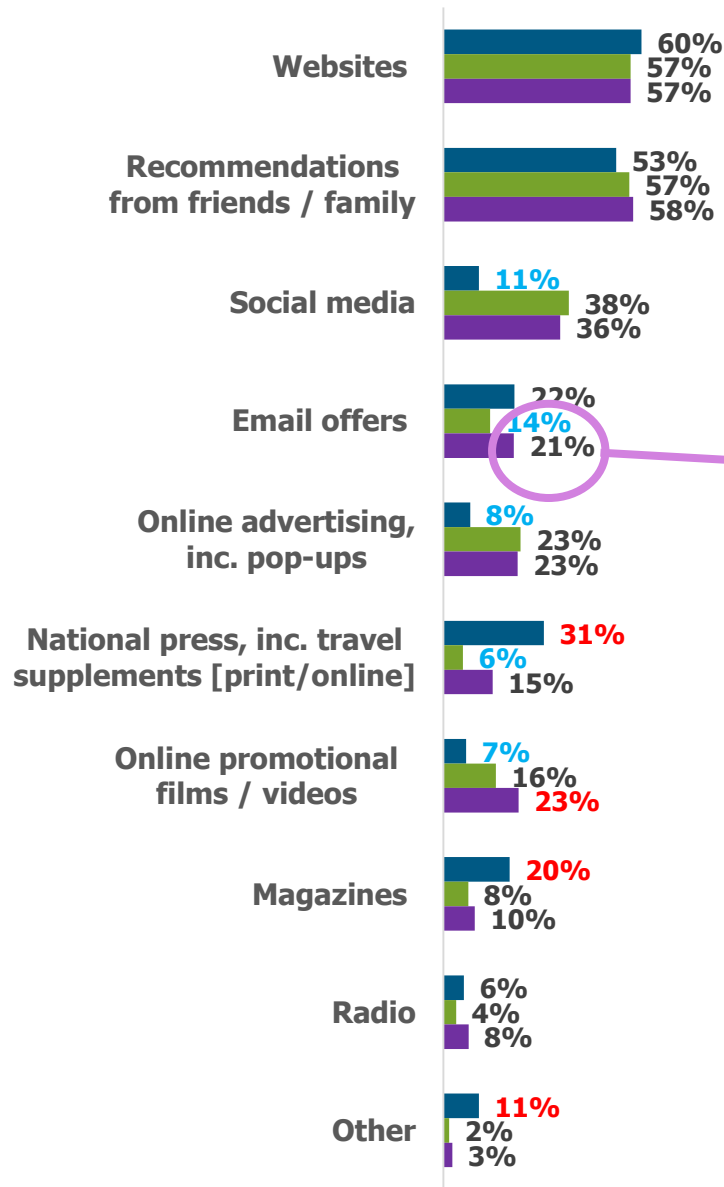
Higher for Irish Families
[78% vs. 67%]





Websites and recommendations are of upmost importance

Other online sources used by Active and Families but may lack relevance to print-reliant Cultural



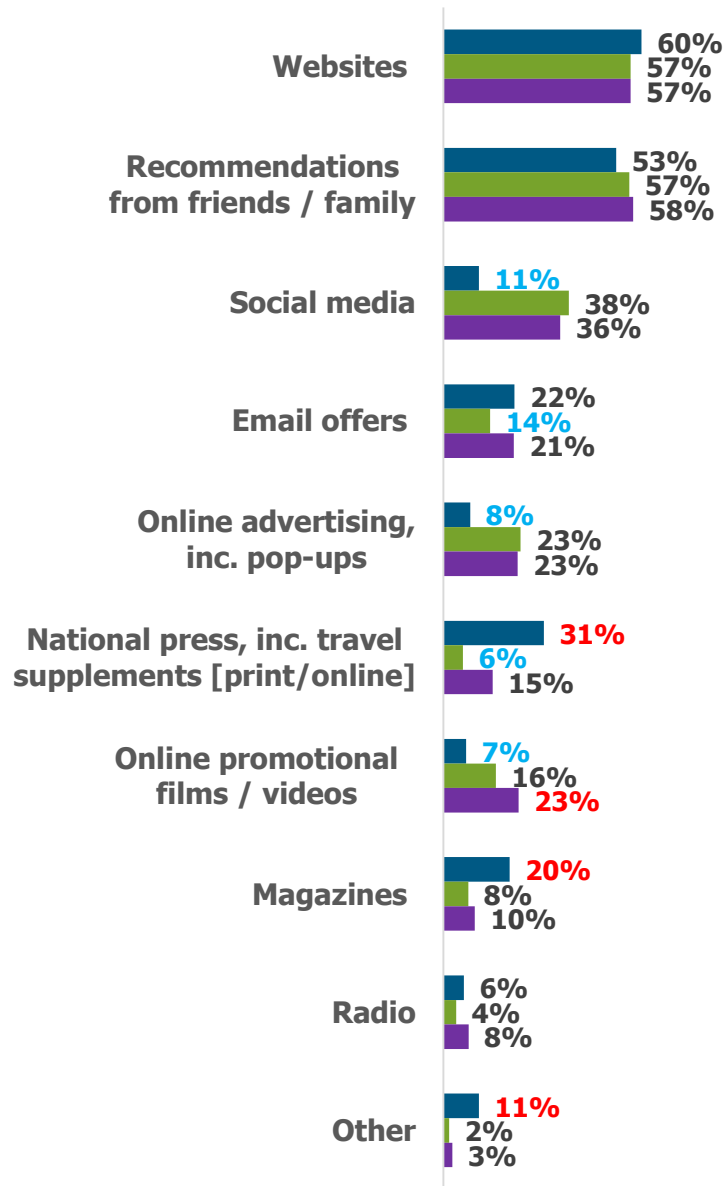
Websites and recommendations are of upmost importance

Higher for Irish Families [28% vs. 18%]

Other online sources used by **Active** and **Families** but may lack relevance to print-reliant **Culturals**

■ CULTURAL ■ ACTIVE ■ FAMILIES

SOURCES OF INSPIRATION



■ CULTURAL ■ ACTIVE ■ FAMILIES

	CULTURAL	ACTIVE	FAMILIES
BASE:	156	136	210
TripAdvisor	↓ 57%	75%	76%
General Google search	60%	50%	51%
Accommodation booking websites	42%	43%	50%
Tourist board websites	49%	↓ 32%	47%
Websites for specific destinations	↑ 49%	32%	36%
Other	2%	2%	0%
BASE:	28	91	131
Facebook	BASE TOO LOW	85%	91%
Instagram		↑ 66%	41%
Twitter		32%	31%
Other		2%	2%

INFLUENCE ON SELECTING DESTINATIONS

Photography has greatest power to influence decision making

<i>% influential</i>	CULTURAL	ACTIVE	FAMILIES
Photography of a location	↓84%	95%	94%
Film / video footage of a location	↓58%	81%	83%
Online itineraries / maps	71%	73%	78%
3D / virtual tours of a location	↓29%	46%	↑63%

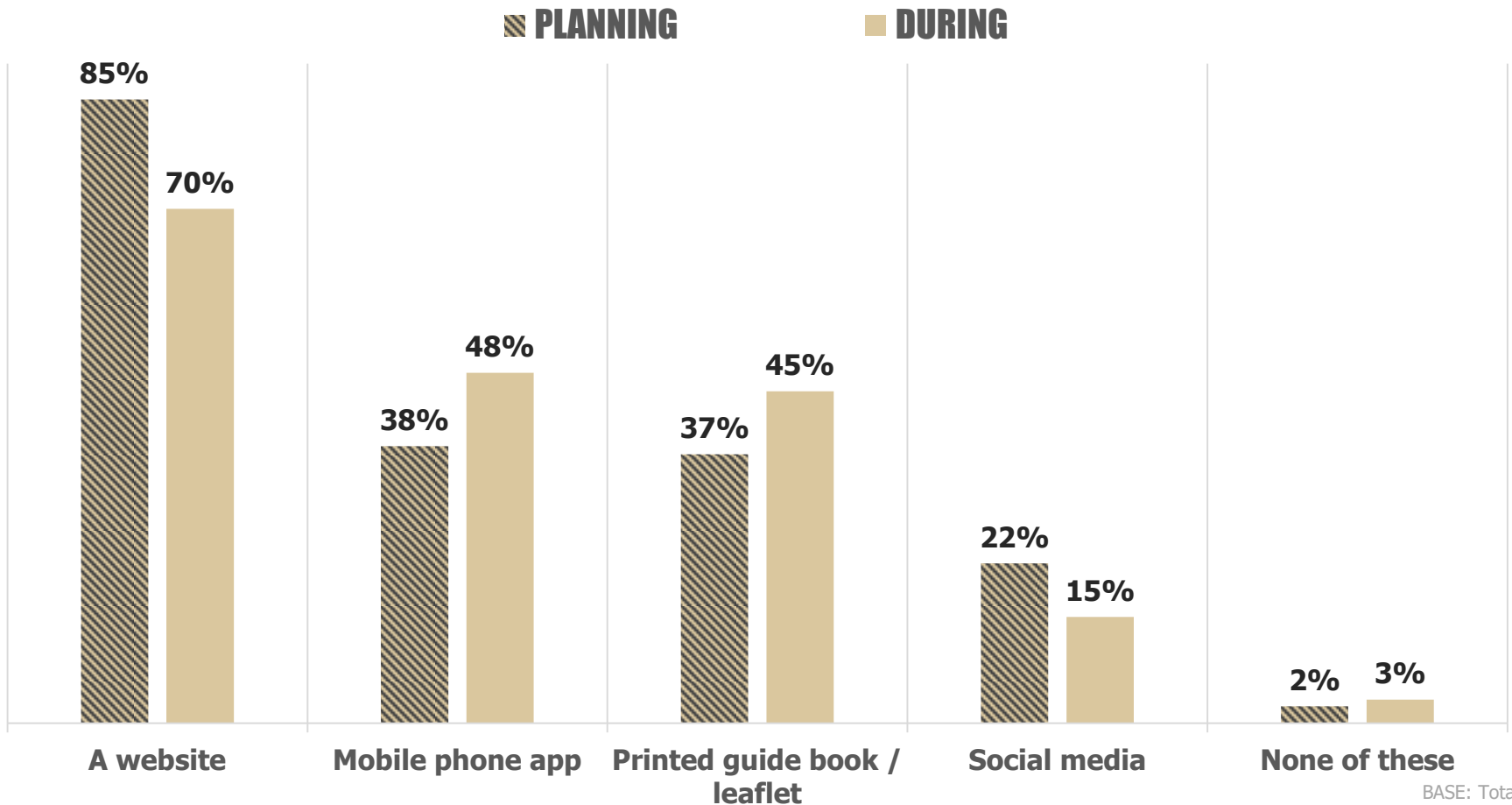
INFLUENCE ON SELECTING DESTINATIONS

3D tours divide opinion
Film / video less liked by **Cultural** segment

<i>% influential</i>	CULTURAL	ACTIVE	FAMILIES
Photography of a location	↓84%	95%	94%
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ACCESSING INFORMATION

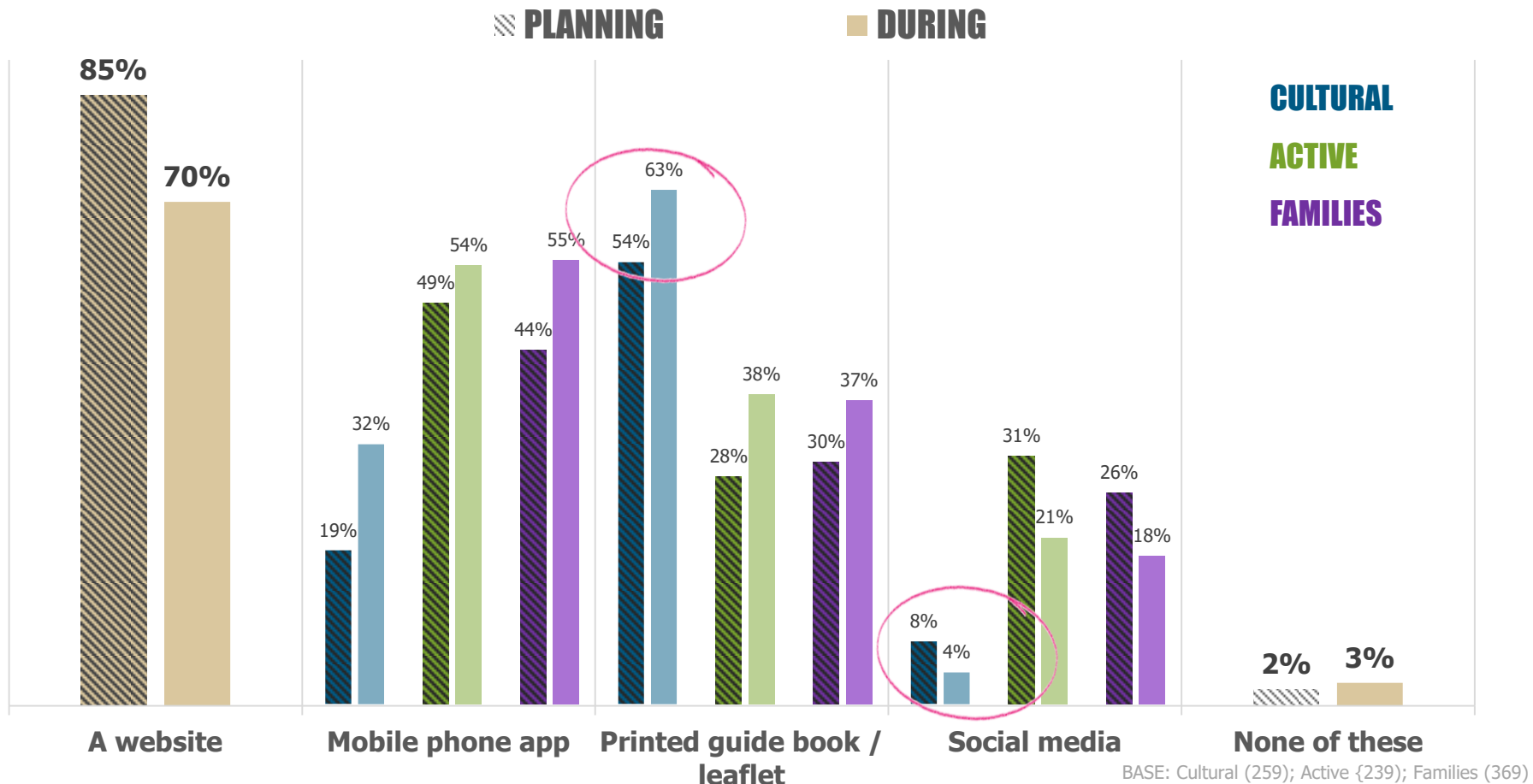
Websites dominate as source most likely to be used before and during a trip to access destination information



ACCESSING INFORMATION

Cultural segment again rely on print and tend to reject apps and social media

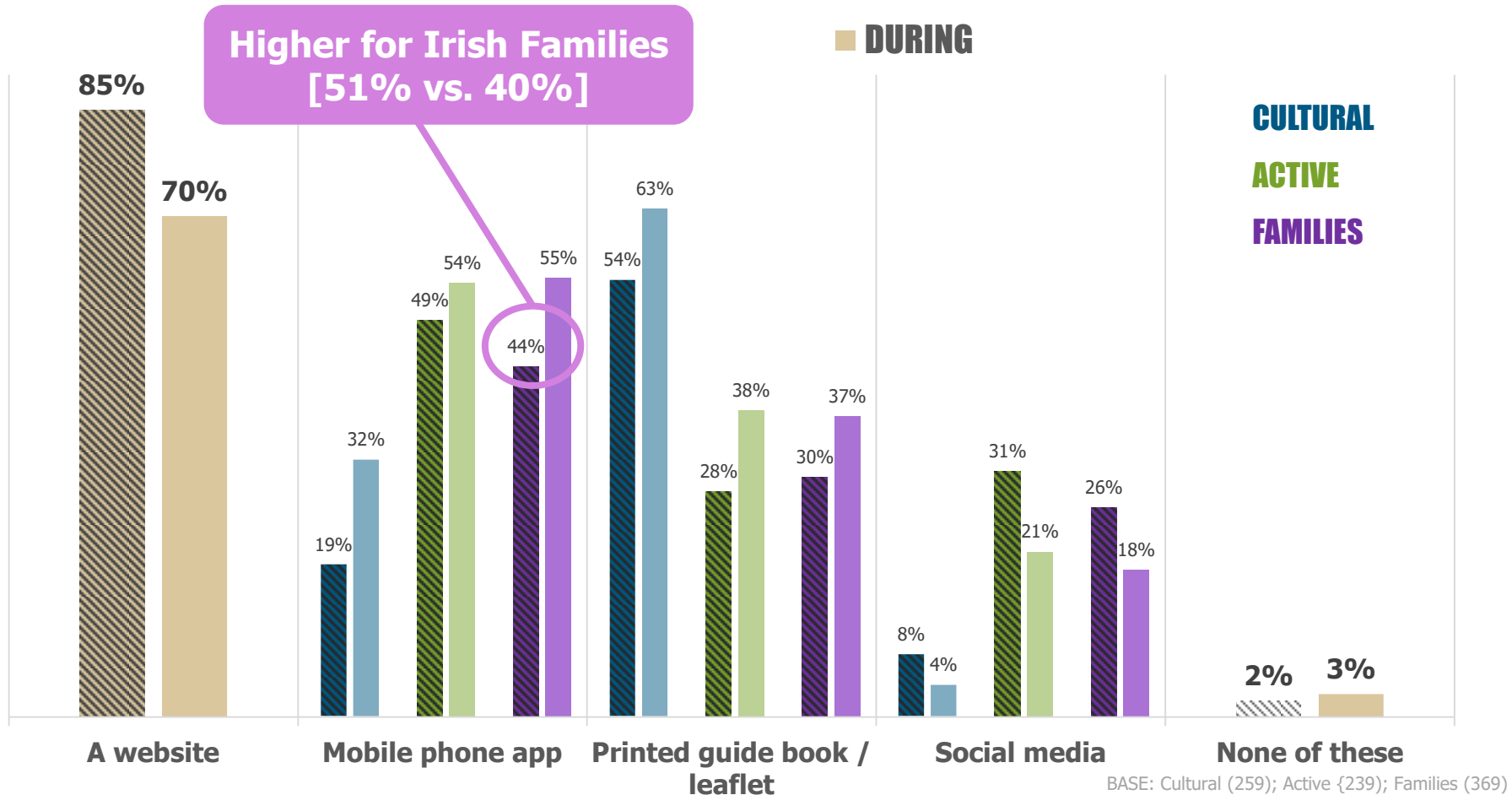
Positive results in reaching other segments **via an app**



ACCESSING INFORMATION

Cultural segment again rely on print and tend to reject apps and social media

Positive results in reaching other segments **via an app**



I look for lots of things in a holiday, like making memories, freedom and to recharge. A deeper understanding and fresh perspective on the place is important — inspire me!

REACH
THROUGH

Websites (Google prominence)
National Press
Magazines
Email offers

DESTINATION
CHOICE

Location photography
Online itineraries

ACCESSING
INFO

Websites
Guidebooks / leaflets
Might use an app during trip

DON'T BOTHER! Social media, online adverts, radio,
promo films, 3D tours



CULTURAL

I want great memories from a short break and to escape from it all and come home recharged. I like a sense of adventure, but I'm not too worried about a deeper understanding of the place.

REACH
THROUGH

Websites (particularly Trip Advisor)
Social media (Facebook; Instagram)
Online adverts

DESTINATION
CHOICE

Location photography and film
Online itineraries

ACCESSING
INFO

Websites
Apps
Social media before and guide books during a trip

DON'T BOTHER! Email offers, national press, magazines, radio, 3D tours, social media during a trip



ACTIVE

Creating memories and a sense of togetherness is what it's all about — it's more important than finding out about the place. We want freedom, an escape and to feel recharged.

REACH
THROUGH

Websites (particularly Trip Advisor)
Social media (Facebook)
Online adverts
Online promos / film

DESTINATION
CHOICE

Location photography and film
Online itineraries
3D tours

ACCESSING
INFO

Websites
Apps (particularly during)
May use guide books during a trip

DON'T BOTHER! National press, magazines, radio, social media during a trip



FAMILIES

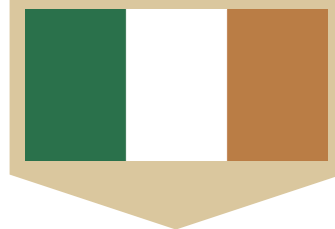


Relationship with Celtic Routes Geography

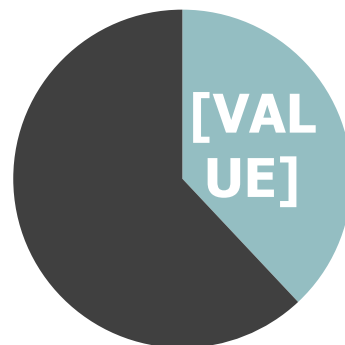
**Respondents
were shown
maps of the
relevant
regions**



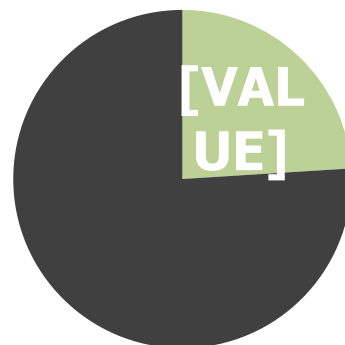
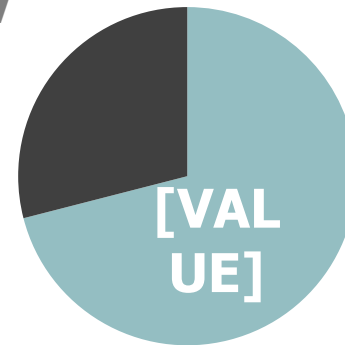
Welsh
region is
more
widely
visited
amongst
the
sample



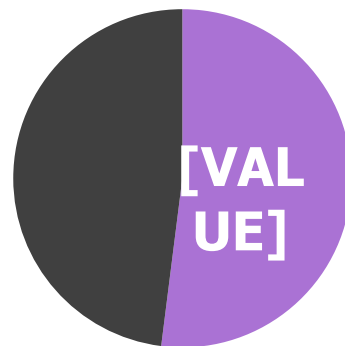
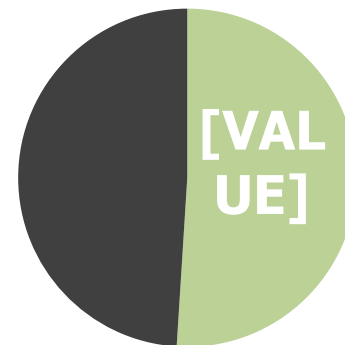
% visited



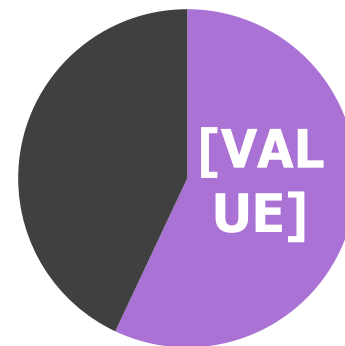
CULTURAL



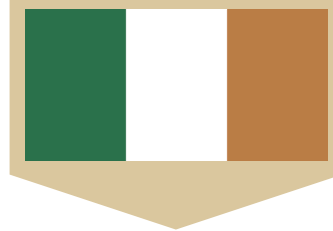
ACTIVE



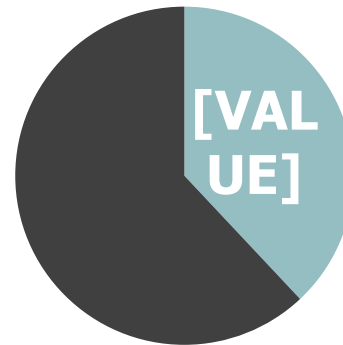
FAMILIES



RELATIONSHIP WITH REGIONS

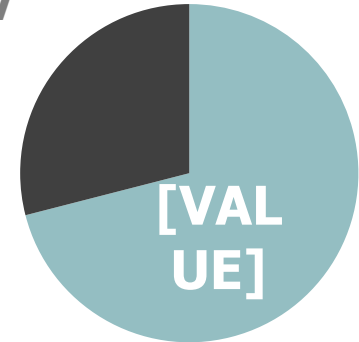


**Many visiting
Welsh region**

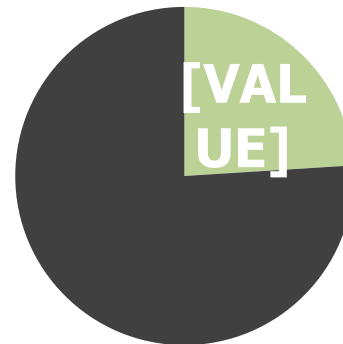


% visited

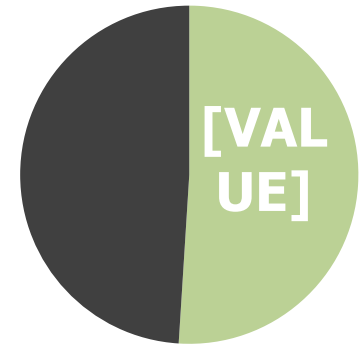
CULTURAL



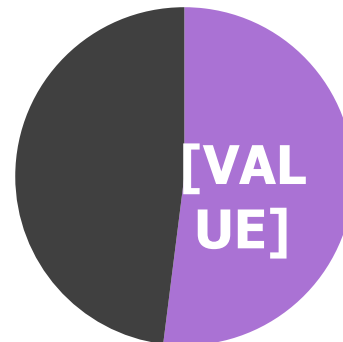
**Least likely to
be visiting
Irish region**



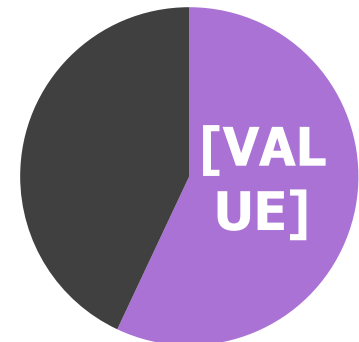
ACTIVE



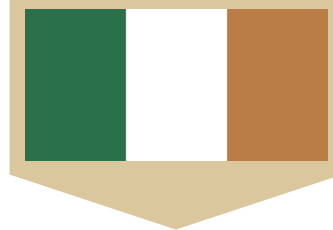
**Around half
visiting both
regions**



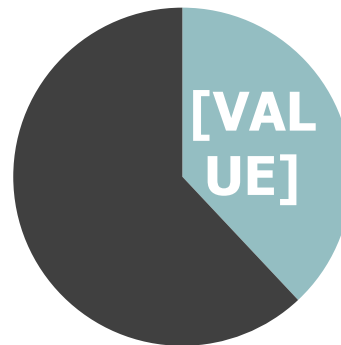
FAMILIES



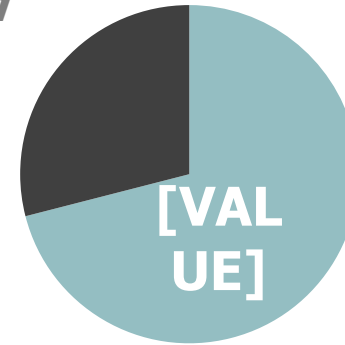
RELATIONSHIP WITH REGIONS



**Many visiting
Welsh region**

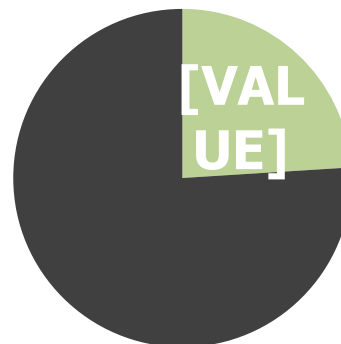


% visited

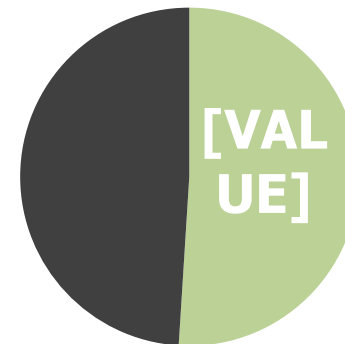


CULTURAL

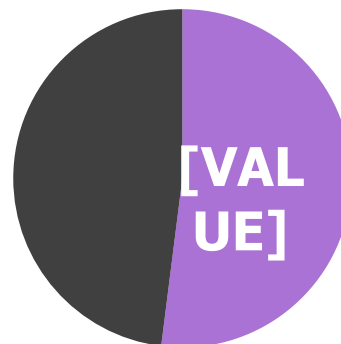
**Least likely to
be visiting
Irish region**



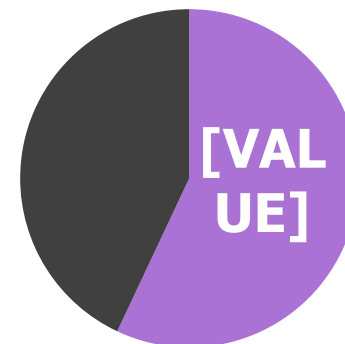
ACTIVE



**Irish Families more likely
to have visited Ireland
[81% vs. 37%]
and less likely to have
visited Wales
[40% vs. 65%]**

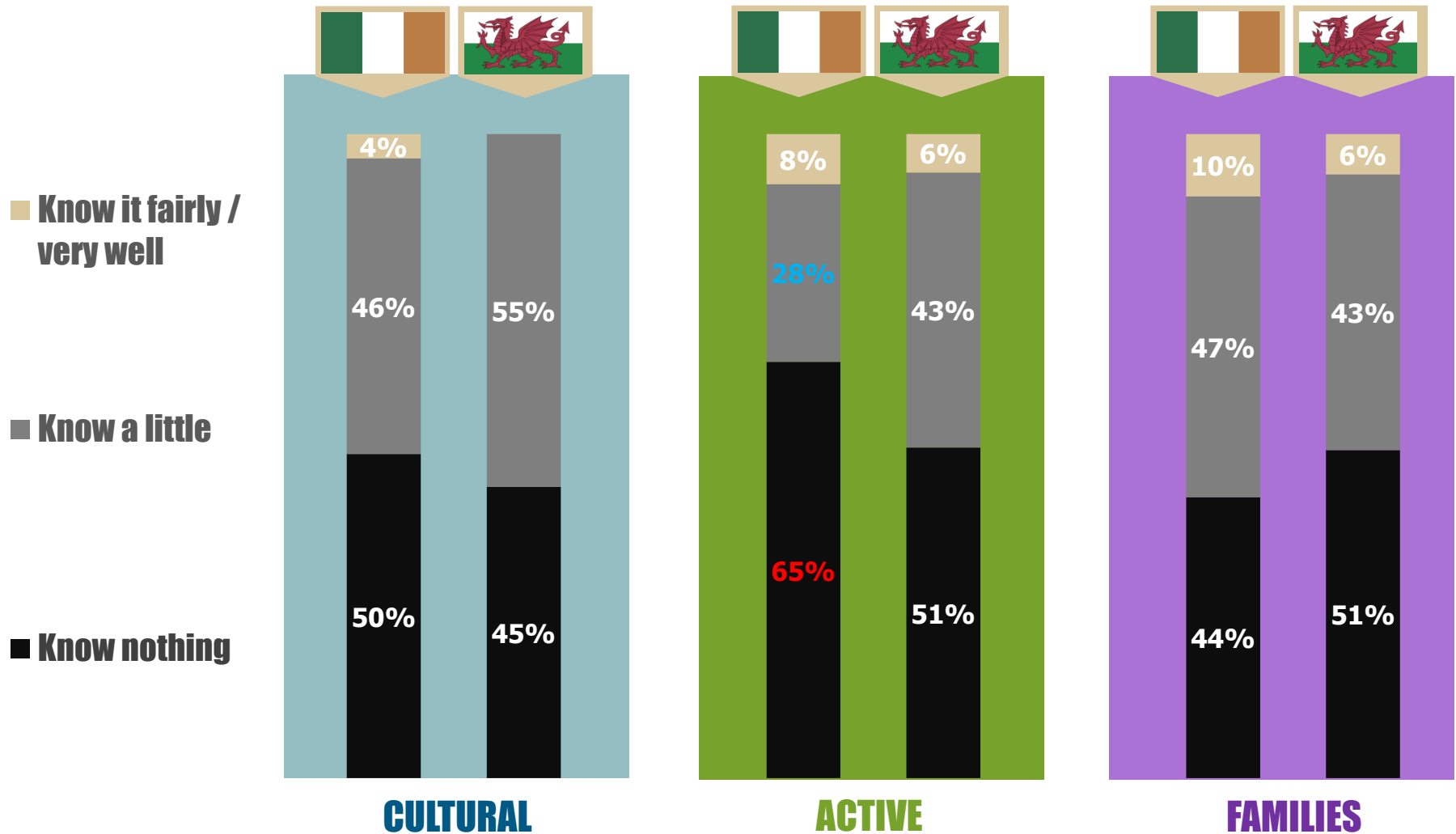


FAMILIES



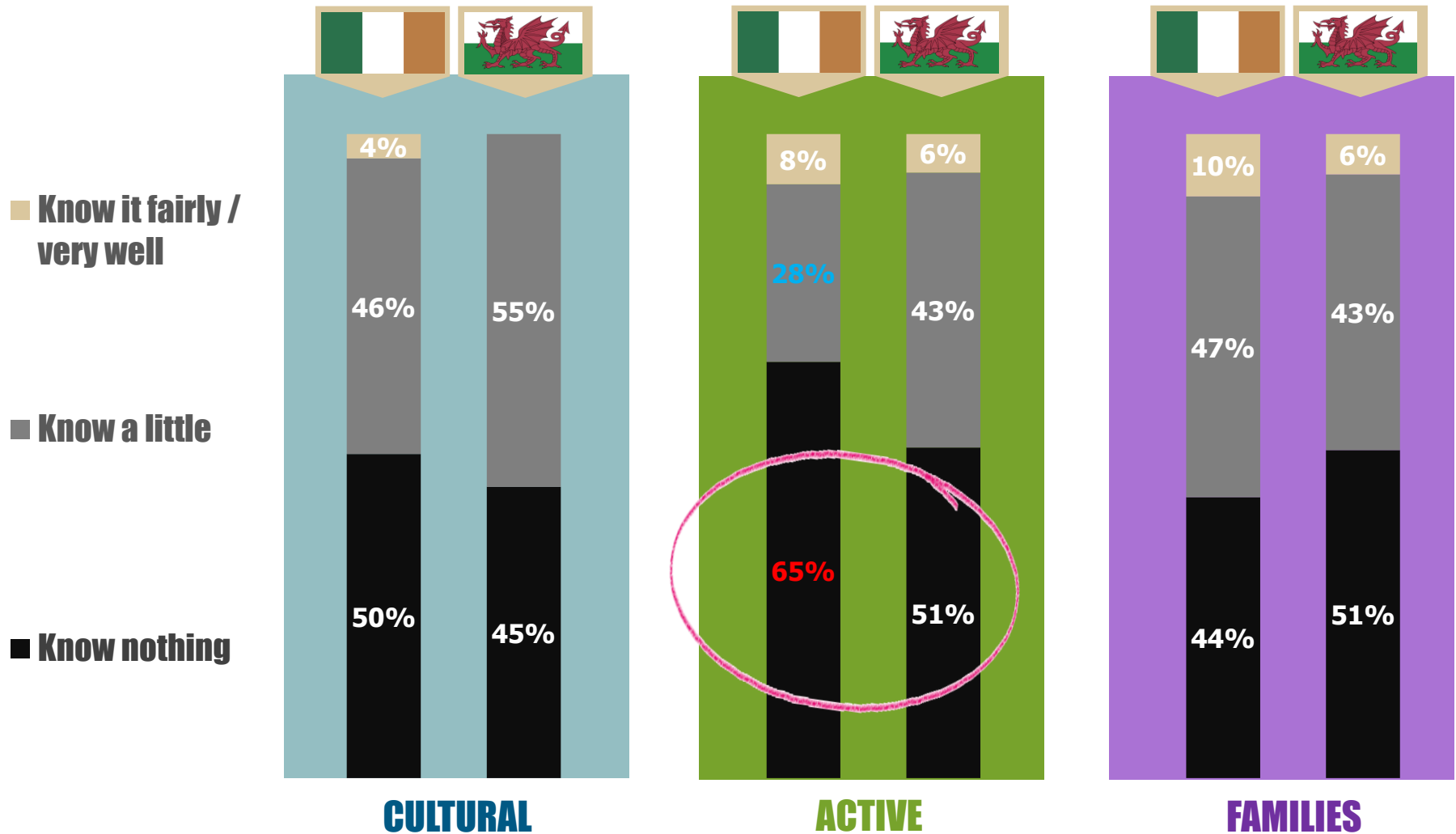
NON VISITORS

Awareness raising needed amongst NON VISITORS – many know nothing



NON VISITORS

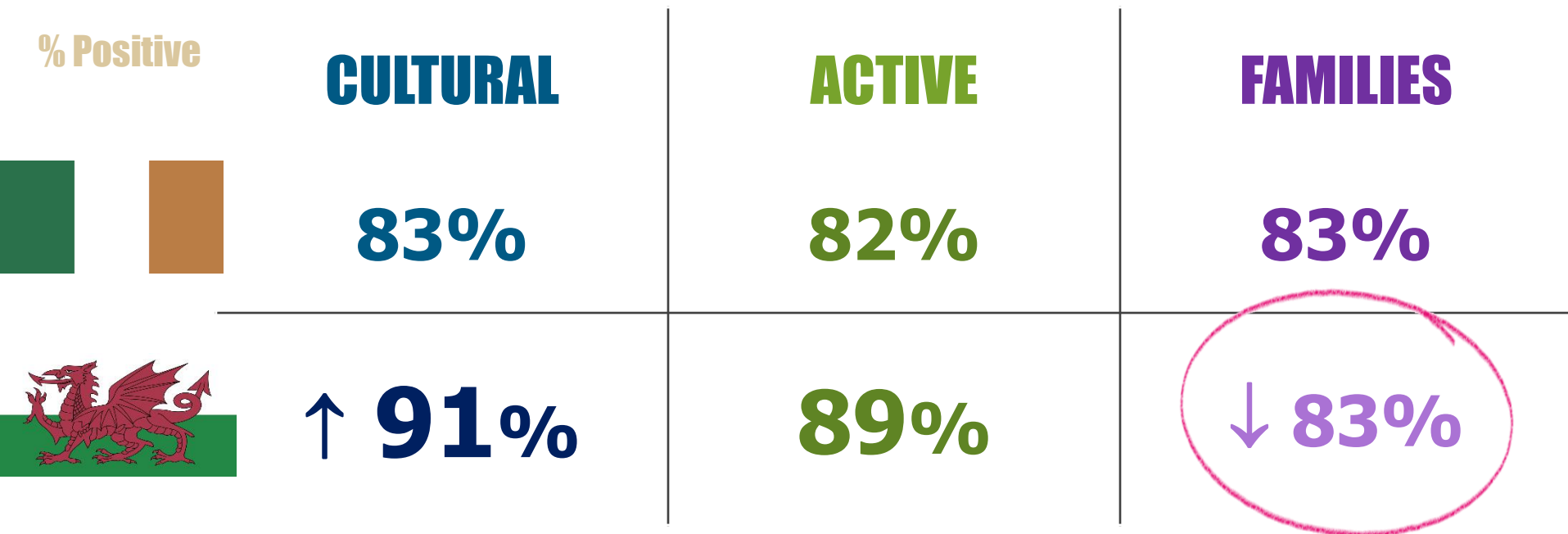
Particular gap exists for **Active** segment on Irish region



PERCEPTION OF THE DESTINATIONS

All with some knowledge would **rate both locations highly** as potential holiday destinations

Most work to be done to persuade **Families** that Wales appeals as a destination



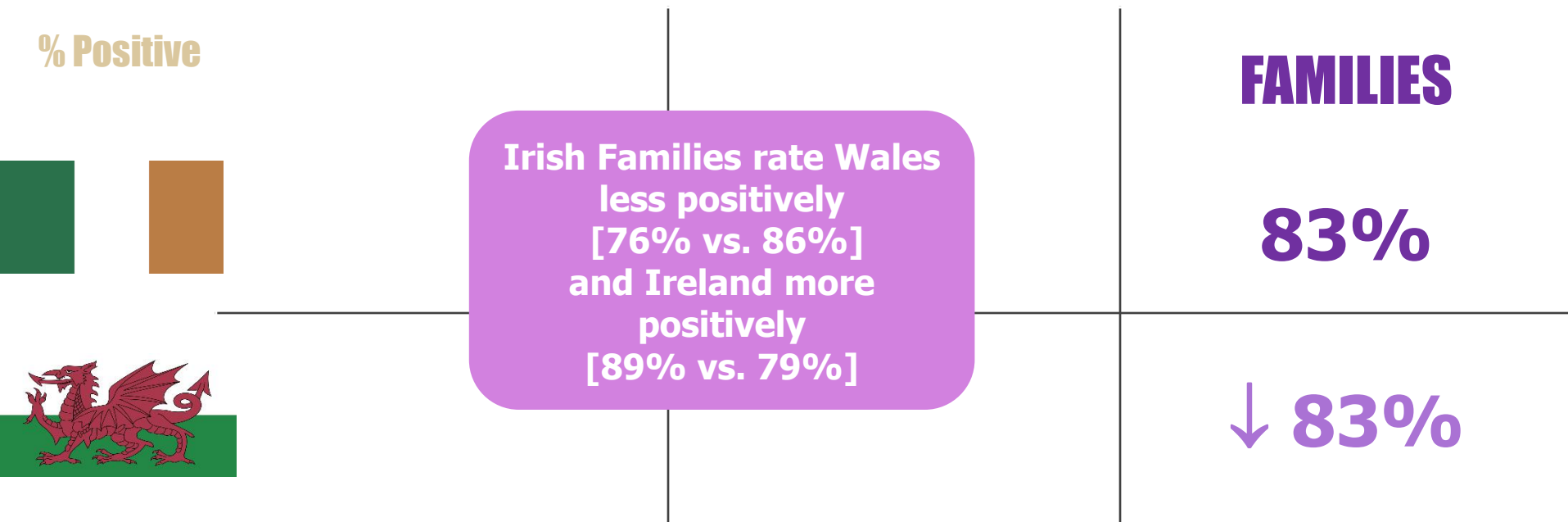
BASE: Know something about Irish destination Cultural (179); Active {122}; Families (297)

BASE: Know something about Welsh destination Cultural (226); Active {179}; Families (288)

PERCEPTION OF THE DESTINATIONS

All with some knowledge would **rate both locations highly** as potential holiday destinations

Most work to be done to persuade **Families** that Wales appeals as a destination



BASE: Know something about Irish destination Cultural (179); Active {122}; Families (297)

BASE: Know something about Welsh destination Cultural (226); Active {179}; Families (288)



= already go on this type of trip



Road trips / touring short breaks appeal widely for both markets



CULTURAL



ACTIVE



FAMILIES



APPEAL OF REGIONS



= already go on
this type of trip



**Less likely to
already be
taking this
type of trip**



CULTURAL



ACTIVE



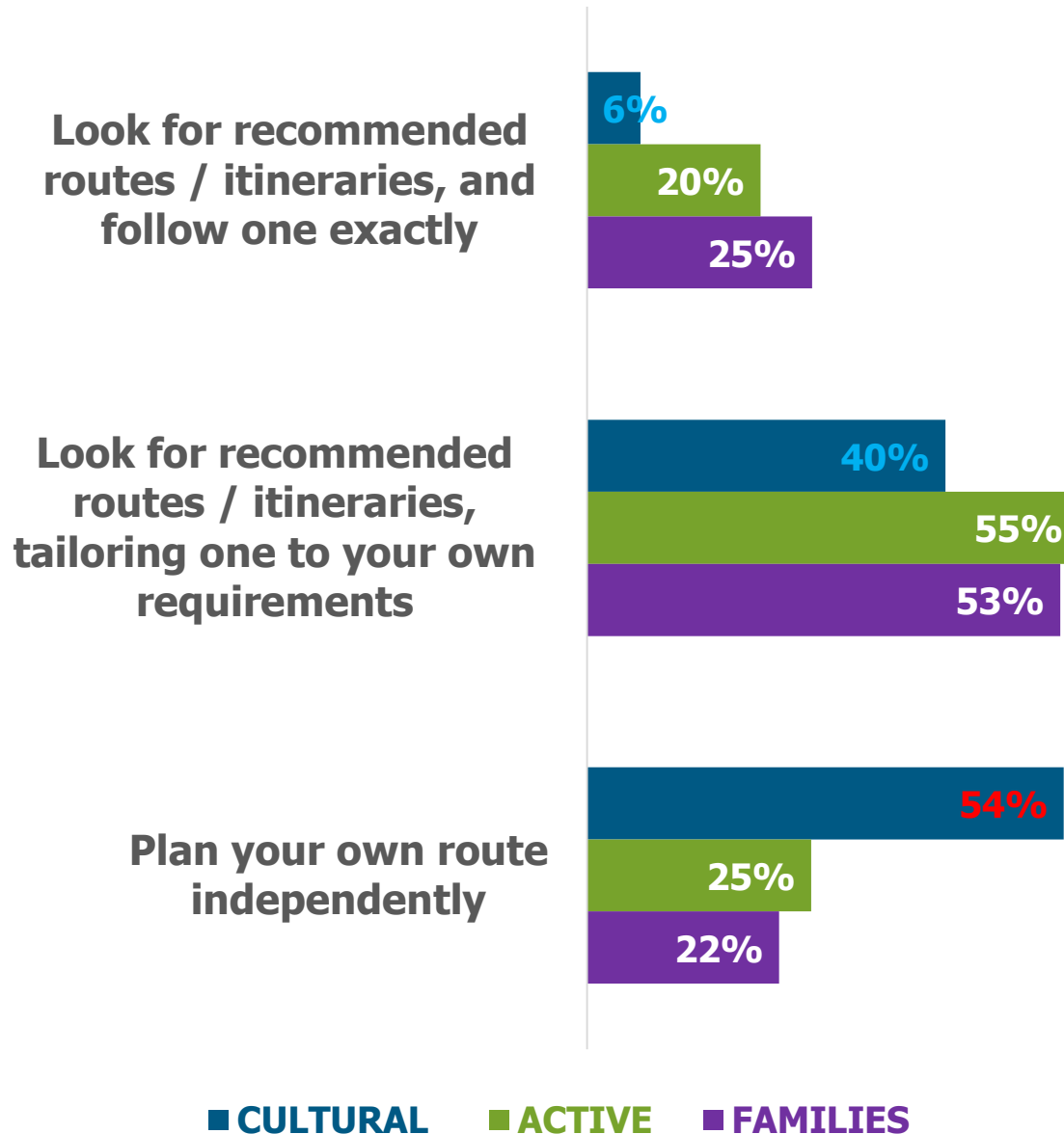
**Higher for Irish Families
[97% vs. 88%]**



FAMILIES



If undertaking a road trip / touring holiday, would you...



Culturals differ:
many want independent planning – others seek advice



Evaluating the propositions

We'd like to know if these ideas sound like the type of short break / holiday that you would enjoy

Respondents shown words and images for each proposition.

For example:



Delve back in time to journey through a rich history of castles, grand houses and conquests. Uncover the stories of battles, kings and princes. And discover the poets and musicians inspired by those stories and landscapes.



SEGMENT: CULTURAL

% ASSOCIATE WITH COUNTRY



**Saints & Stones (I)/
Spiritual Places &
Sacred Stones (W)**



**Time to discover
(I)/Poets &
Princes (W)**



**Ireland Inspired
(I)/Meet the
Makers (W)**



**Glorious
Garden Tales (I)**



**Colourful
Towns with
Character (W)**



89% ↑



80%

78%

83%

75%

83% ↑

72%

80% ↑

82%

84%

CULTURAL: PERFORMANCE OF PROPOSITIONS

WOULD ENJOY

WANT TO KNOW
MORE

CONSIDER FOR
A HOLIDAY

Average across
propositions

82%

81%

76%

Saints & Stones (I)/
Spiritual Places
& Sacred Stones (W)

-2%

-1%

0%

Time to discover (I)
/Poets & Princes (W)

3%

4%

4%

Ireland Inspired (I)/
Meet the Makers (W)

-13%

-15%

-16%

Glorious Garden
Tales (I)

-2%

-1%

-1%

Colourful Towns
with Character (W)

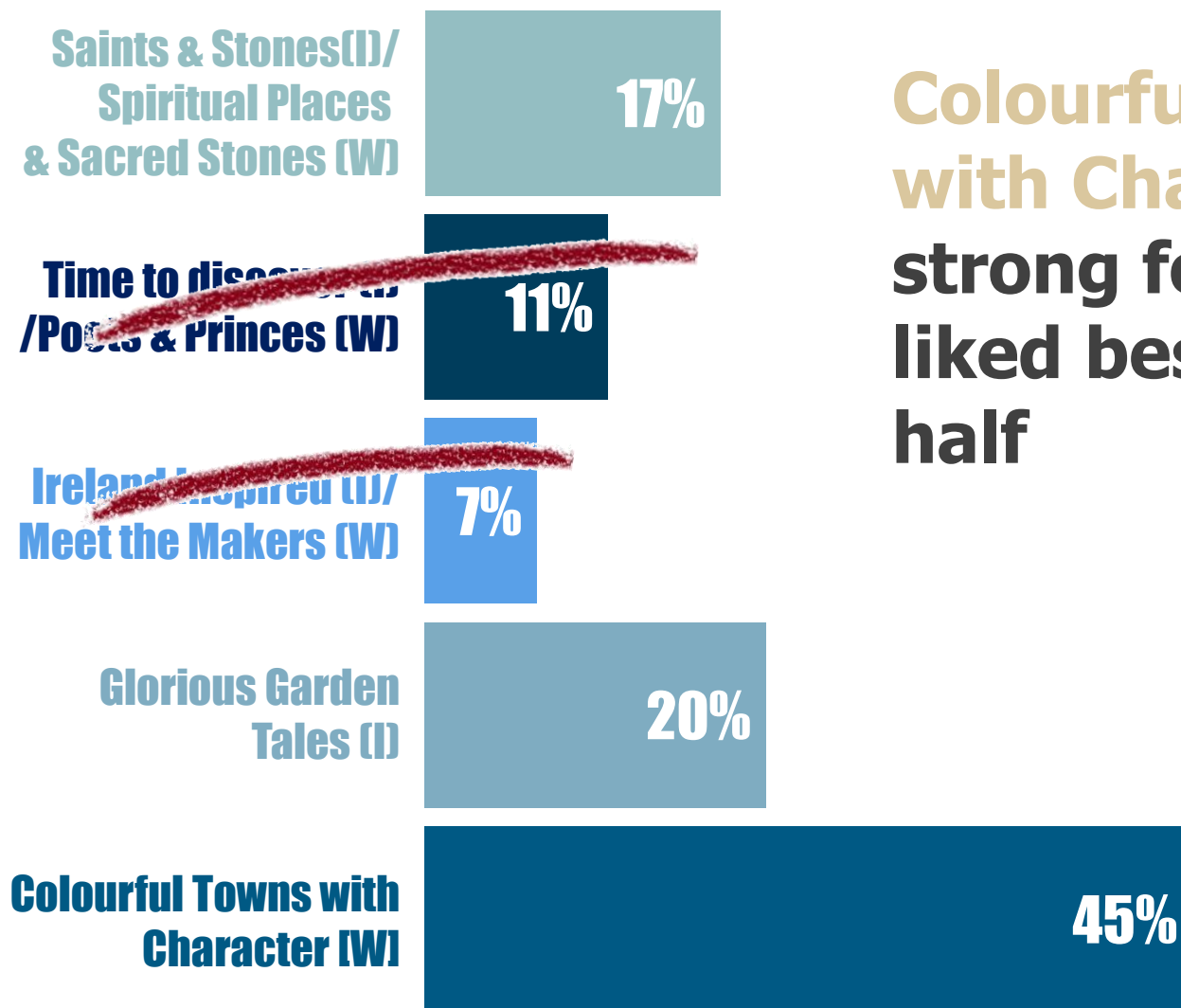
14%

13%

14%

Two propositions standing out as **best** / **worst**
performing – others cluster together

Which of the short break / holiday ideas do you like the best?



Colourful Towns with Character is a strong forerunner, liked best by nearly half

The best liked propositions are **highly persuasive** - particularly effective for Wales

% CONSIDER VISITING



**Saints & Stones (I)/
Spiritual Places &
Sacred Stones (W)**



89%



98%



**Glorious
Garden Tales (I)**

89%

96%



**Colourful
Towns with
Character (W)**

88%

93%

SAINTS AND STONES / SPIRITUAL PLACES

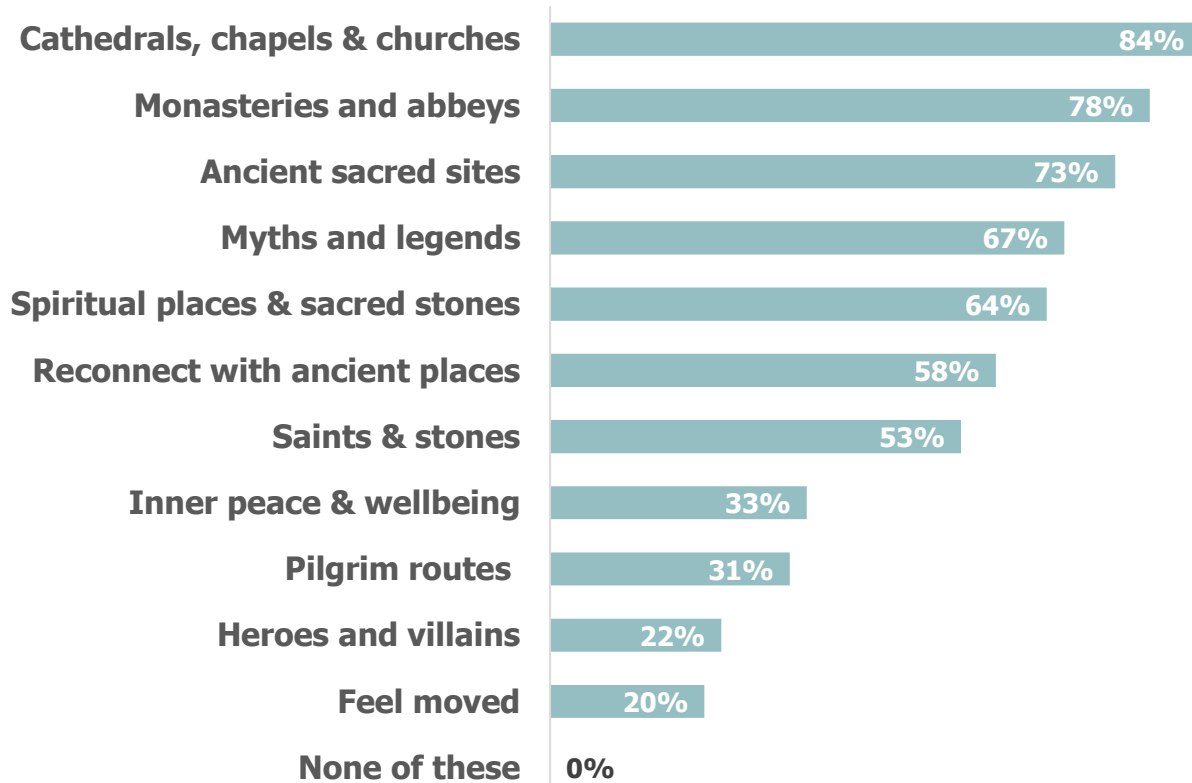
Monasteries & abbeys

Cathedrals, chapels & churches

Myths & legends

Ancient sacred sites

Spiritual places & sacred stones



BASE: Cultural Segment who liked proposition best (45)



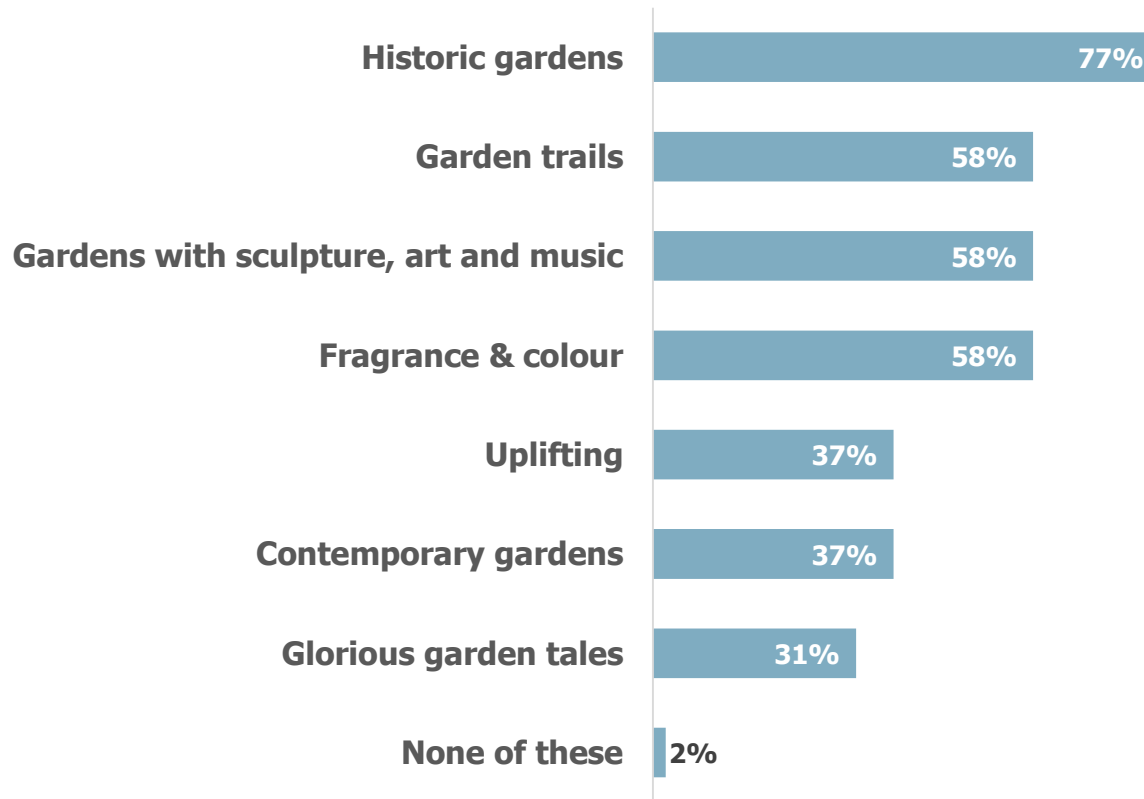
GLORIOUS GARDEN TALES

Fragrance & colour

Historic gardens

Gardens with sculpture, art & music

Garden trails



BASE: Cultural Segment who liked proposition best (52)



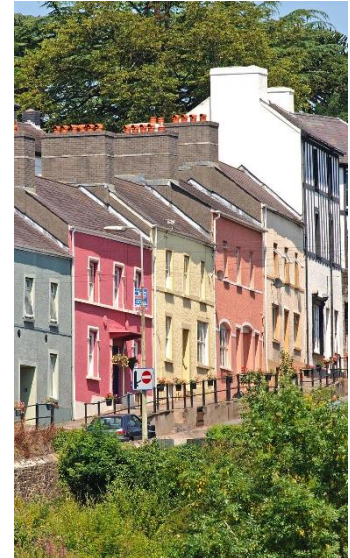
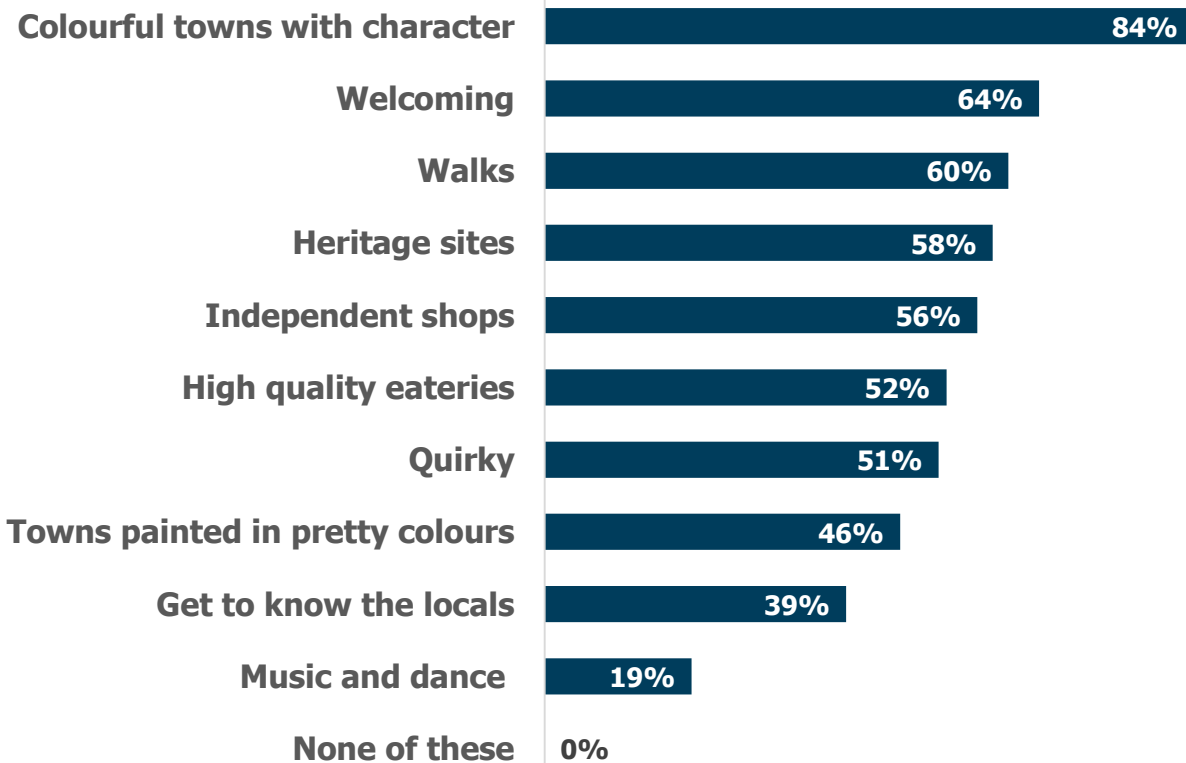
COLOURFUL TOWNS WITH CHARACTER

Independent shops

Colourful towns with

Walks character Welcoming

Heritage sites





**Saints & Stones III/
Spiritual Places &
Sacred Stones IW**

Only proposition across segments
with stronger link to Ireland vs. Wales
Proposition has scope to encourage a
visit for either market

Focus on architectural locations
appeals



**Glorious
Garden Tales III**

Emphasis on the 'historic' nature
of the visit is important for this
audience who are eager to learn
and immerse themselves in a
place



**Colourful Towns
with Character IW**

**Strongest proposition for personal
relevance and encouragement to
find out more –**

**valuable considering non visitors
are info-light**



CULTURAL

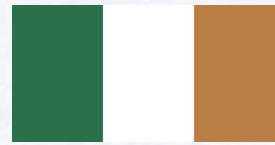


SEGMENT: ACTIVE

% ASSOCIATE WITH COUNTRY



**Exhilarating
Adventures (I) /
Adrenaline
Challenge (W)**



72%



79%



**Wild Ireland (I) /
Untamed Wales
(W)**

87%

88%



**Step into the
Landscape (I)**

86%

90%



**Walking
Discovery
Trails (W)**

82%

92% ↑

ACTIVE: PERFORMANCE OF PROPOSITIONS

WOULD ENJOY

WANT TO KNOW
MORE

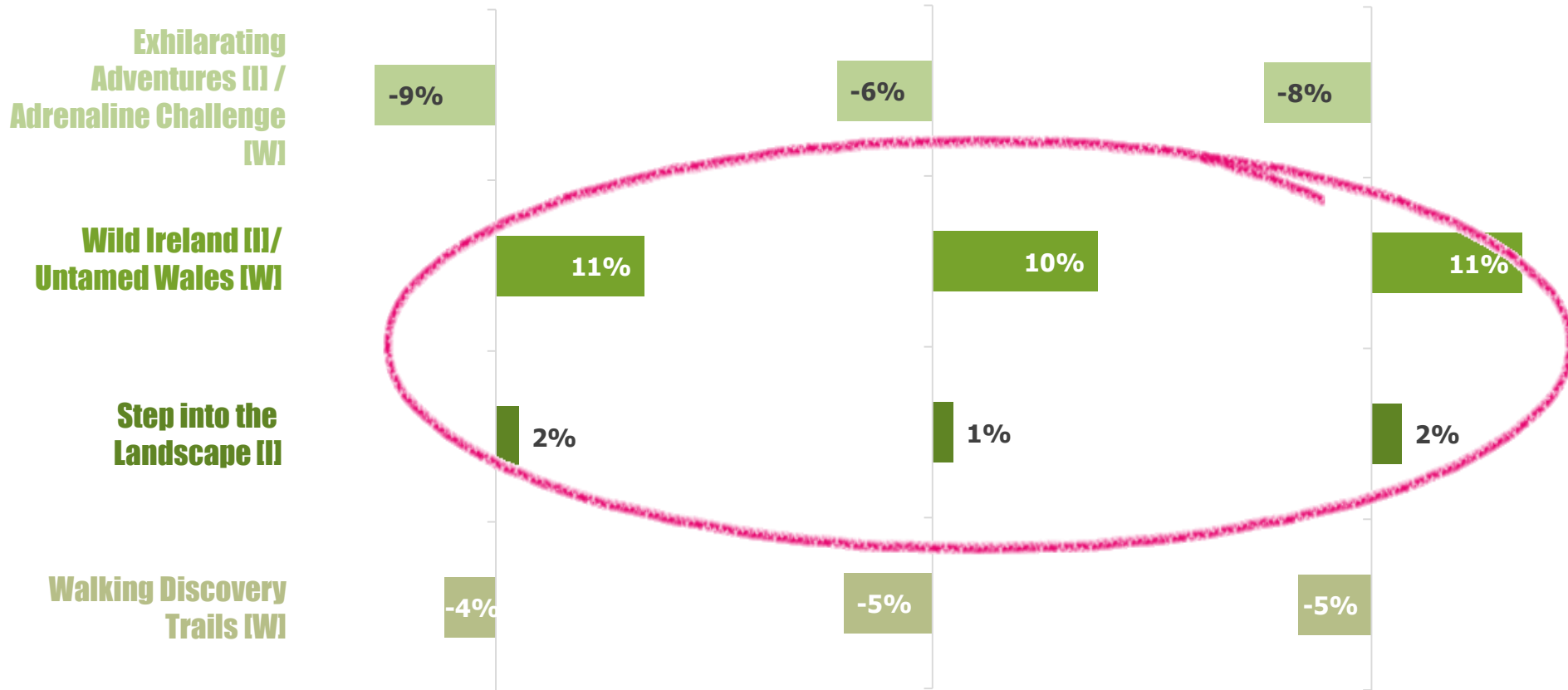
CONSIDER FOR
A HOLIDAY

Average across
propositions

85%

82%

81%



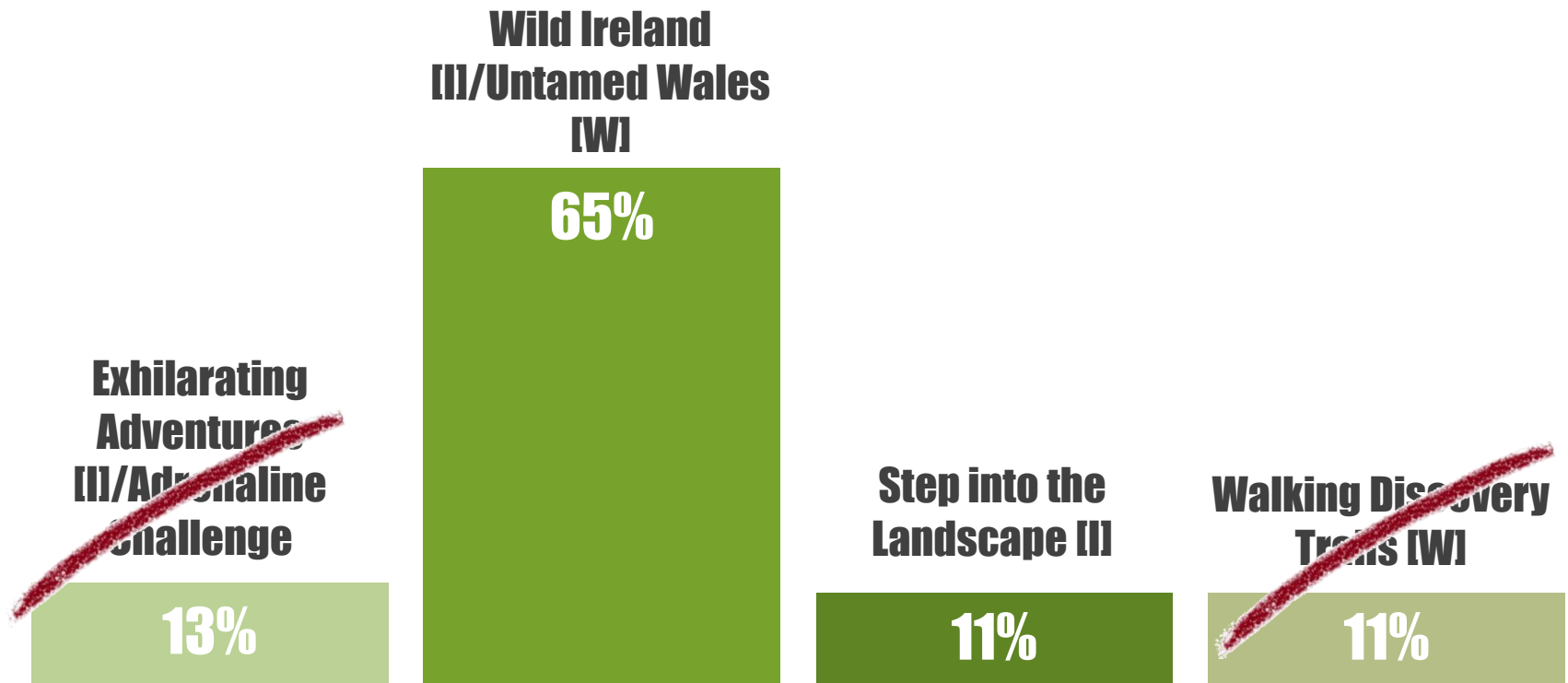
Two propositions are received **more positively** across all measures

ACTIVE: WHICH THEY LIKED BEST

Which of the short break / holiday ideas do you like the best?

BASE: Active (239)

Wild Ireland / Untamed Wales is the stand out winner for this segment



The most liked propositions work equally strongly to persuade to **visit** either market

% CONSIDER VISITING



**Wild Ireland (II)
Untamed Wales
(W)**



95%



95%



**Step into the
Landscape (II)**

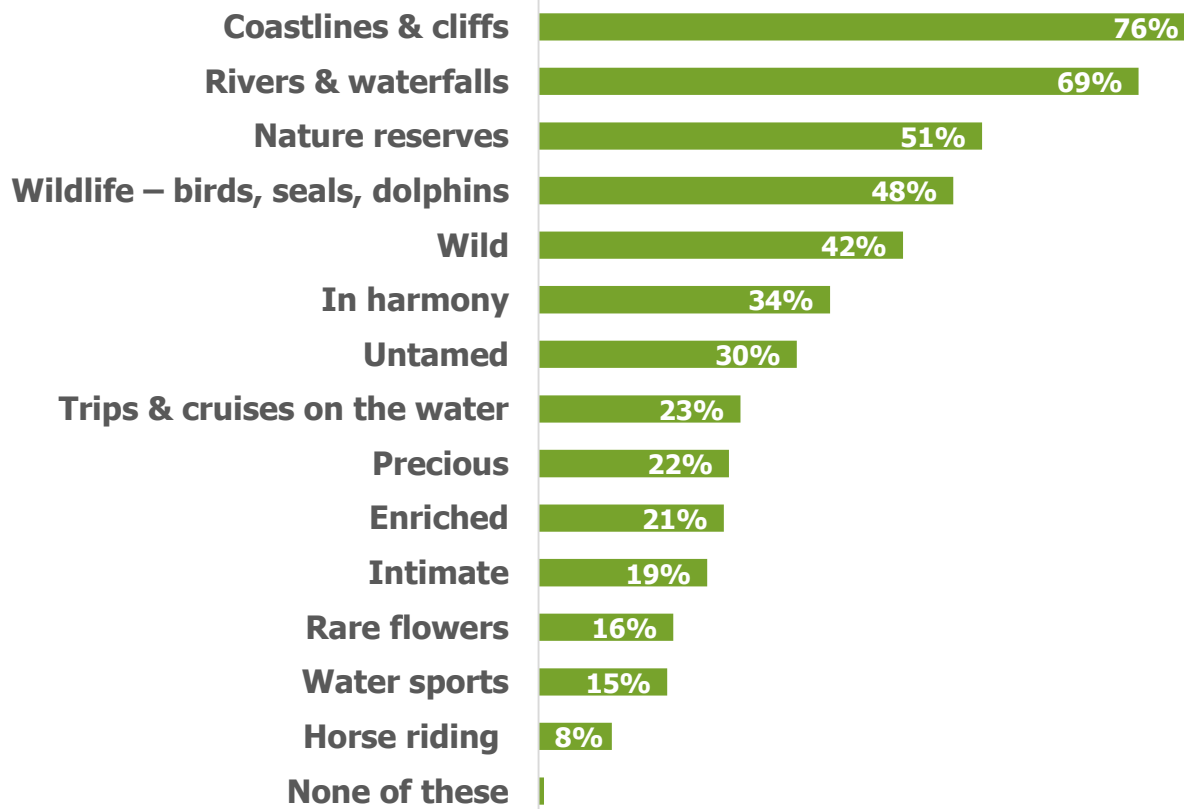
93%

96%

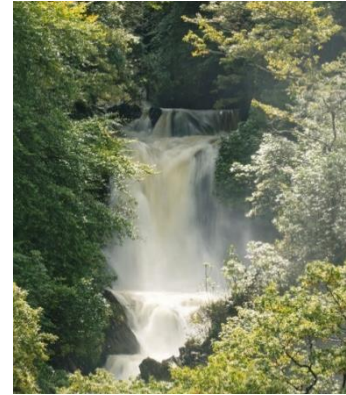
WILD IRELAND / UNTAMED WALES

GETTING THE LANGUAGE RIGHT

Wildlife – birds, seals, dolphins Wild **Coastlines & cliffs** Nature reserves Rivers & waterfalls

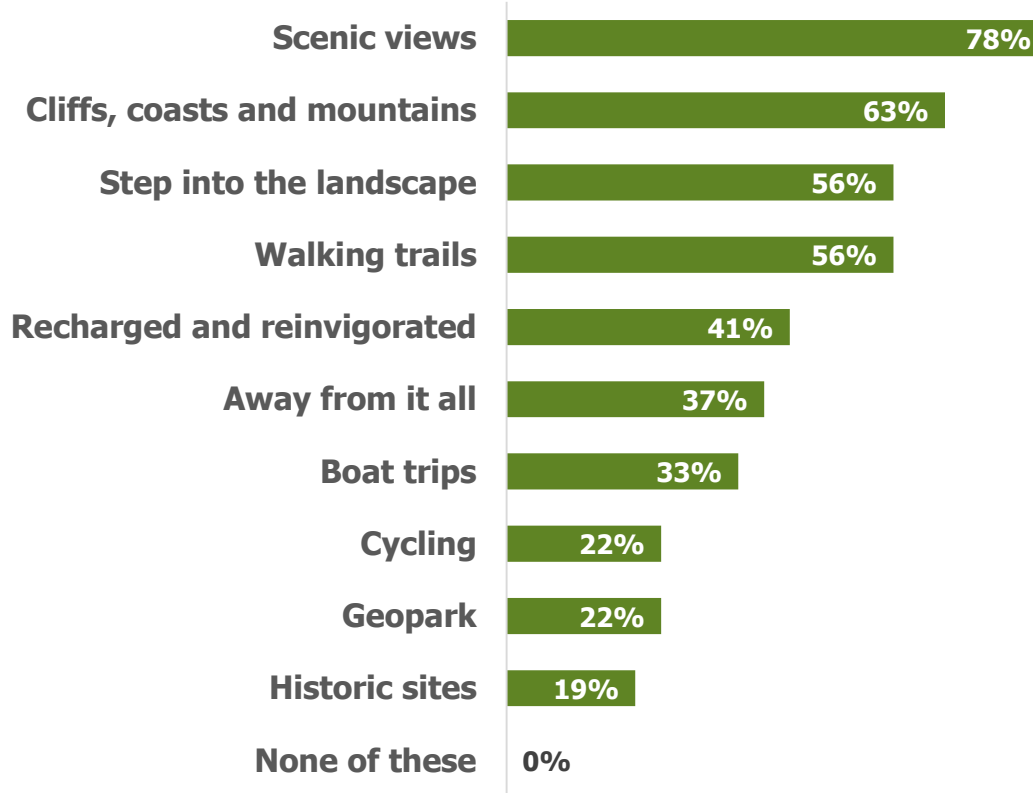


BASE: Cultural Segment who liked proposition best (155)



STEP INTO THE LANDSCAPE

Walking trails Cliffs, coasts and mountains Scenic views Step into the landscape





**Wild Ireland (II)/
Untamed Wales
(W)**

Clear 'winner' for this segment for either market – highly relevant, intriguing and persuasive

Tangible references to the geographical aspects of the landscape are vital to the description



**Step into the
Landscape (II)**

High strength of association with both markets

Describing the scenic landscape and views will drive appeal

Walking trails are attractive, but references to other specific activities aren't as important



ACTIVE



SEGMENT: **FAMILIES**

% ASSOCIATE WITH
COUNTRY



**Mini Adventures in
the Wild [W]**



87%



90%



**Epic Adventures in
the Wild [I] / Tire
out the Teens [W]**

83%

86%

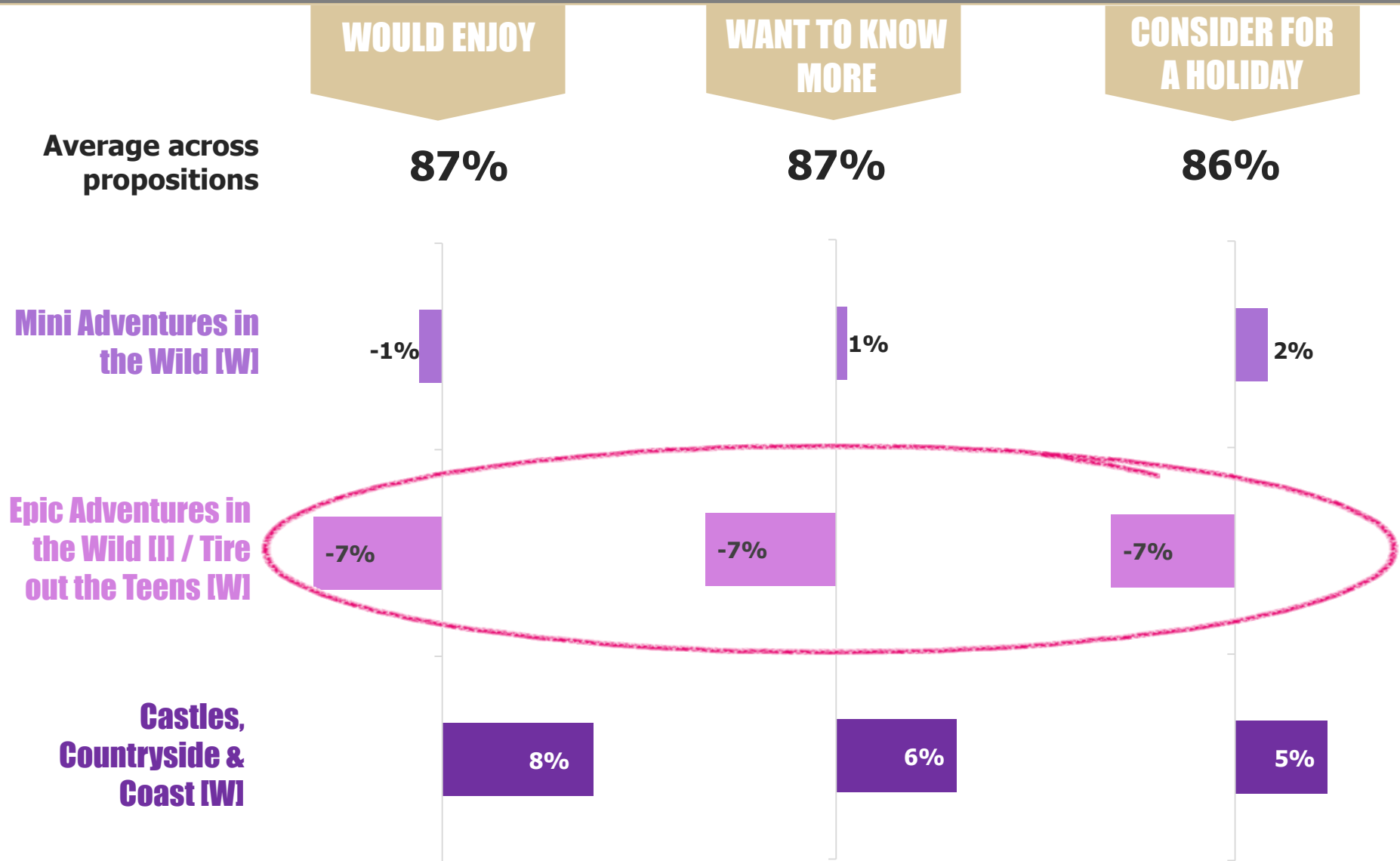


**Castles,
Countryside &
Coast [W]**

92%

94%

FAMILIES: PERFORMANCE OF PROPOSITIONS



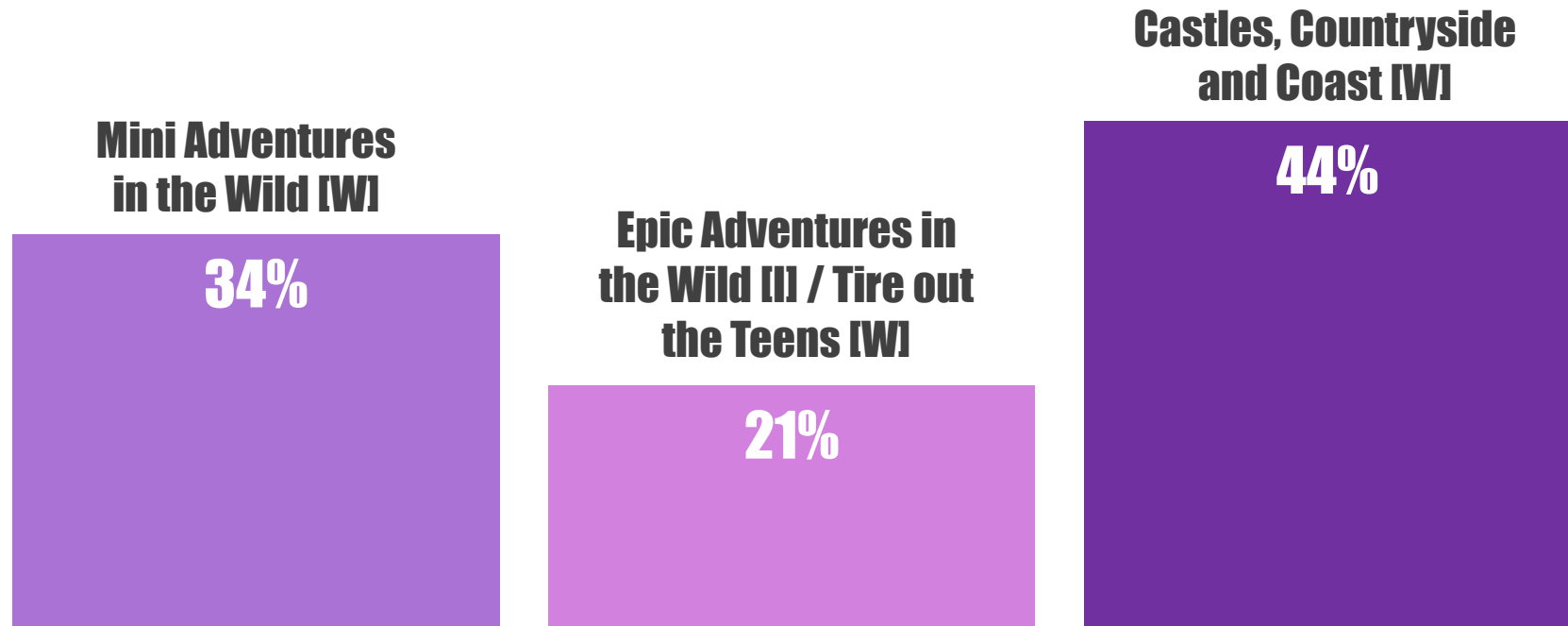
One proposition is consistently **less well rated**

FAMILIES: WHICH THEY LIKED BEST

Which of the short break / holiday ideas do you like the best?

BASE: Families (369)

Although **Castles, Countryside and Coast** appeals to the largest proportion, significant minorities find the alternatives more appealing



This segment are **highly motivated** by the propositions for both markets

% CONSIDER VISITING



Mini Adventures in the Wild [W]

91%

95%



Epic Adventures in the Wild [I] / Tire out the Teens [W]

92%

100% ↑



Castles, Countryside & Coast [W]

92%

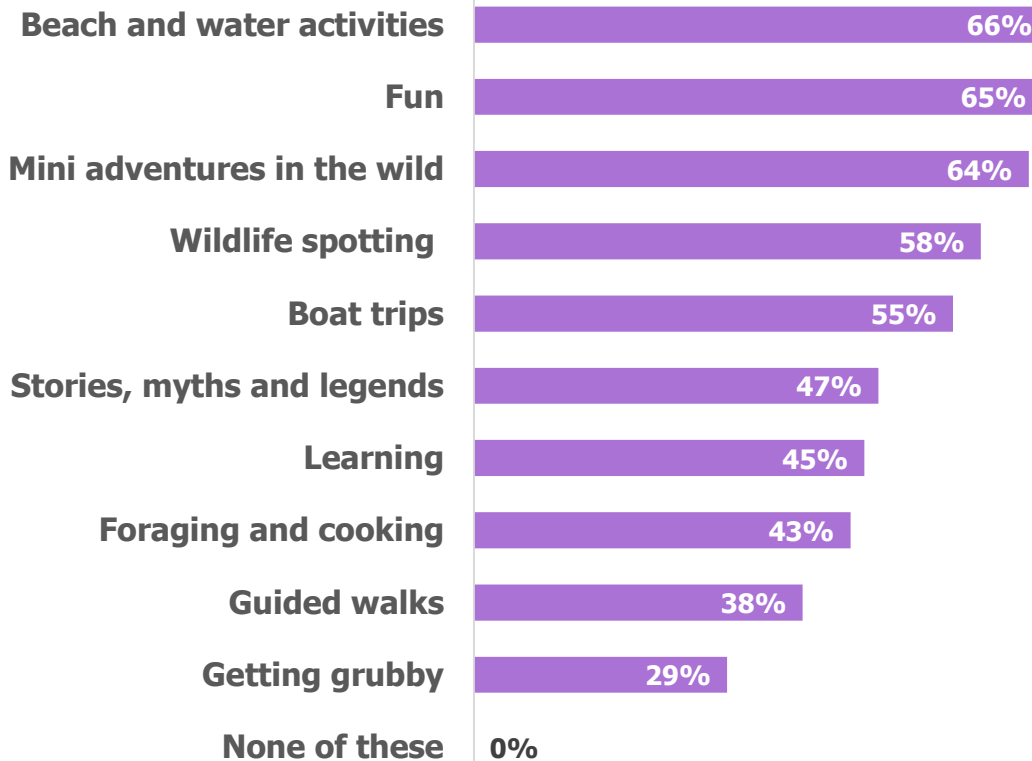
98% ↑

MINI ADVENTURES IN THE WILD

Mini adventures in the wild

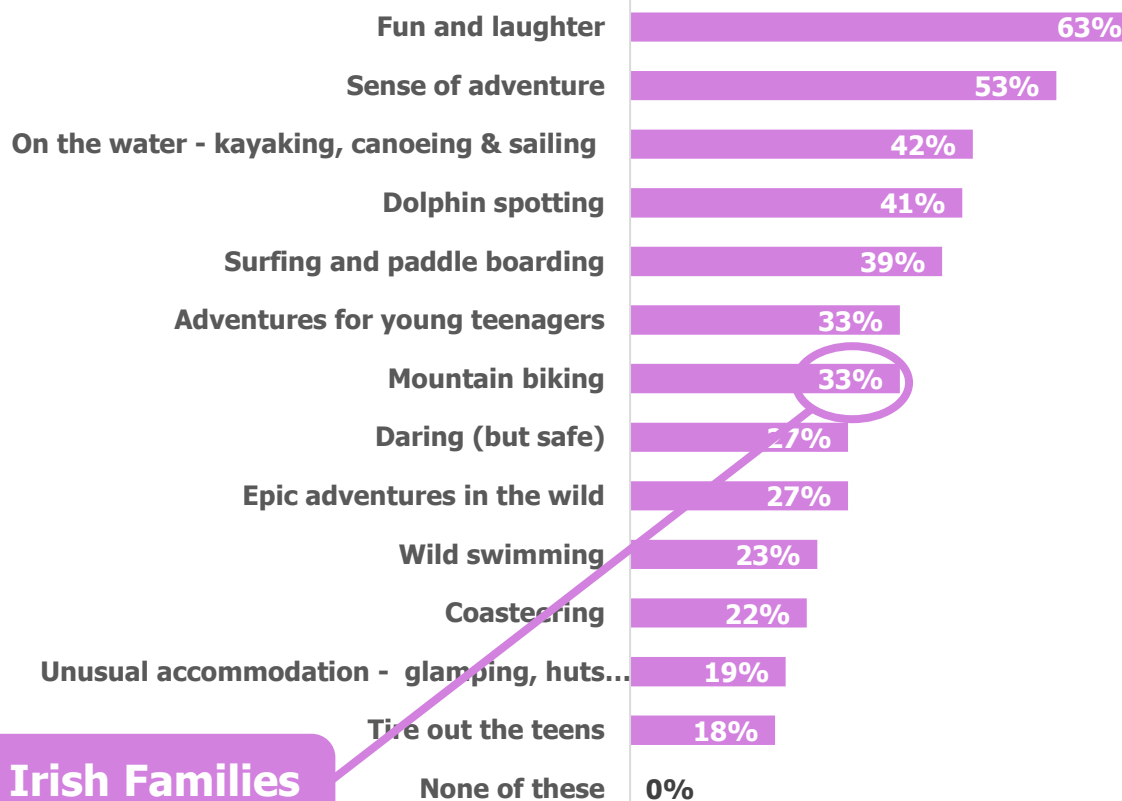
Beach and water activities

Fun Wildlife spotting



EPIC ADVENTURES IN THE WILD [I] / TIRE OUT THE TEENS [W]

Sense of adventure
Fun & laughter On the water
Dolphin spotting



Lower for Irish Families
[14% vs. 41%]

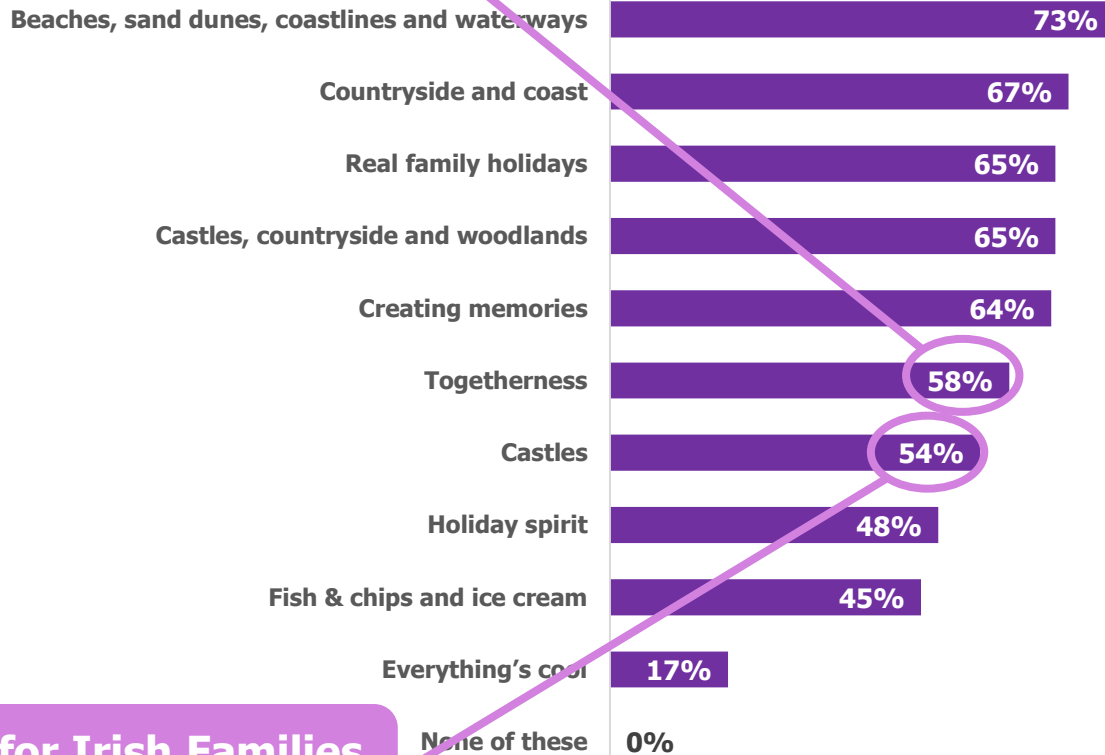
BASE: Families Segment who liked proposition best (78)



CASTLES, COUNTRYSIDE AND COAST [W]

Castles, countryside & woodlands Countryside & coast Real family holidays
 Creating memories Beaches, sand dunes, coastlines & waterways

Higher for Irish Families
 [79% vs. 57%]



Lower for Irish Families
 [41% vs. 60%]





**Mini Adventures
in the Wild [W]**

**Appealing and motivating. Fun
and beach / water activities have
most appeal**



**Epic Adventures in
the Wild [I] / Tire out
the Teens [W]**

**Although not rated as strongly on
some measures, this is highly
persuasive (especially for Wales)
Fun and adventure are key, but
'epic' and more extreme activities
may put some off**



**Castles,
Countryside &
Coast [W]**

**Strongly associated with both
markets and highly relevant to
this audience**

**Description is liked, with content
that tunes in to what this segment
are looking for in a break**



FAMILIES



thinking research