

Travel Trends



BRITAIN



This profile reflects a pre-Covid market place and reviews trend data for the British market from 2007 to 2019. The series begins in 2007 to track the recovery from the last recession up to 2019, the last year of complete overseas data.

As an industry tourism has experienced cycles of downturn and recovery before. While the challenge has never been of this magnitude, the data highlights its resilience and capacity for growth based on past economic shocks.

Understanding travel behaviour in pre-pandemic times will help drive recovery post-Covid.

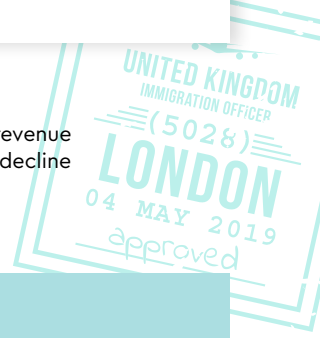
This travel profile looks at:

1. The trend in British tourist numbers and revenue (tourist figures include all reasons for travel: holidaymakers, visiting friends and relatives, business tourists and others combined).
2. British holidaymakers, as an important subset of tourists, and their characteristics and behaviour in pre-Covid times.

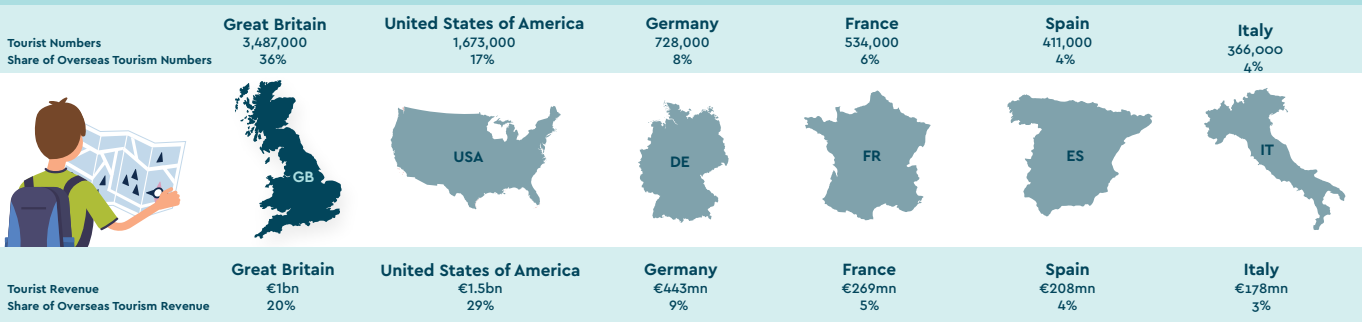
Tourism Numbers and Revenue Trends

Pre-Covid Britain was consistently Ireland's single largest source market in terms of tourist numbers, however Britain's share of all overseas tourists had been in steady decline since 2007 (49% in 2007 compared to 36% in 2019) and British tourist numbers are yet to return to 2007 levels.

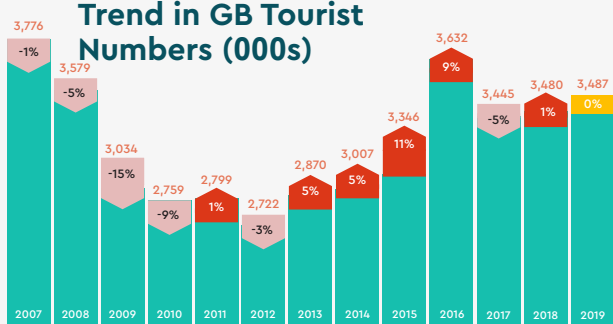
Similarly, the share of total overseas tourist revenue (excluding carrier receipts) has also been in decline (35% in 2007 to 18% in 2019).



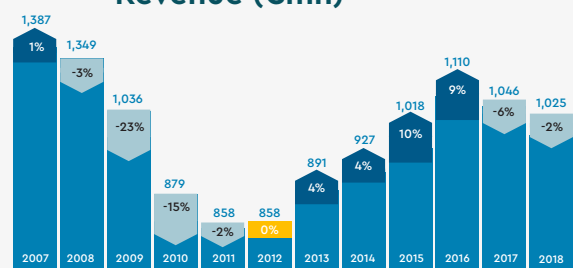
British Share of Overseas Tourists and Revenue (2019)



Trend in GB Tourist Numbers (000s)



Trend in GB Tourist Revenue (€mn)



Britain provides Ireland with the broadest mix of tourists across holidaymaker, visiting friends and relatives (VFR) and business tourists of all markets. Britain is second in revenue to the US, whose tourist numbers include a higher proportion of holidaymakers, who stay longer and consequently spend more.

British Tourists

Tourists stay one or more nights (i.e. excluding same day travellers) and can be classified into:



BRITISH HOLIDAYMAKER TRENDS

Motivation to Travel¹ (Pre-Covid)

For the British market pre-Covid, short breaks tended to be an additional break outside of the main (sun) holiday abroad.

Ireland is often seen as an extension of the domestic offering for the British; familiar, yet a flight/boat trip away. Ireland competes therefore against both British 'domestic destinations' as well as

other destinations in Europe within easy flying distance.

As a result, short breaks to Ireland need to be easy to get to and easy to organise with lots to see and do, in a setting and culture that is perceived to be different from home.



Post-Covid Drivers of Destination Choice

Research by Tourism Ireland² in Ireland's key source markets highlights that while Covid safety assurance comes into play for destination choice, **relaxation, variety of attractions and things to do, quality time with loved ones and value for money** were just as, if not more influential when choosing where to go on a short break or holiday.

Repeat Visitors



Almost six in ten (56%) British holidaymakers are repeat visitors to Ireland, 5% are Irish born and the balance (39%) are visiting for the first time.

Britain has seen a slight decline in the percentage of Irish born holidaymakers since 2007 (7% in 2007) with the reciprocal increase in those visiting for the first time (37% in 2007).

(2019)

Travel Arrangements

Nearly all British holidaymakers (96%) travel independently to Ireland.

The proportion of British holidaymakers travelling on a package tour has been steadily declining (14% in 2007). Perhaps proximity, common language and ease of booking makes it particularly easy for this market to holiday independently.



96%

4%

Package/ Inclusive Trips*

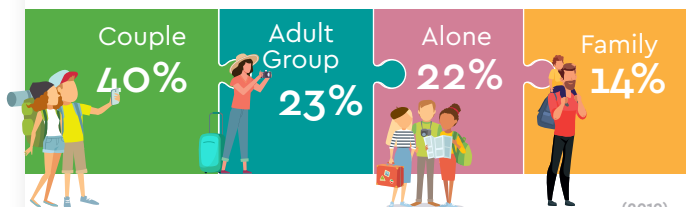


(2019)

Holiday Party Type

Two in five (40%) British holidaymakers travel to Ireland as part of a couple.

Looking at the long term trend the proportion of couples travelling has declined (from a high of 54% in 2007), while adult groups have increased in importance (16% in 2007).



(2019)

Travel Routes

British holidaymakers, typically travel to Ireland by air (74%) and 26% travel by sea, the highest proportion of any market (unsurprisingly).



74%

26%

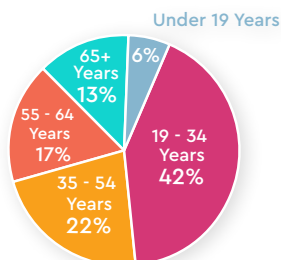


(2019)

British holidaymakers are young; almost half (48%) are under 35.

There has been a marked increase in the 19-34 year olds travelling to Ireland (up from 21% in 2007), with a similar drop in 35-54 year olds (38% in 2007). The proportion of these two age categories have swapped in the last 10+ years.

Holidaymaker Age



Length of Stay

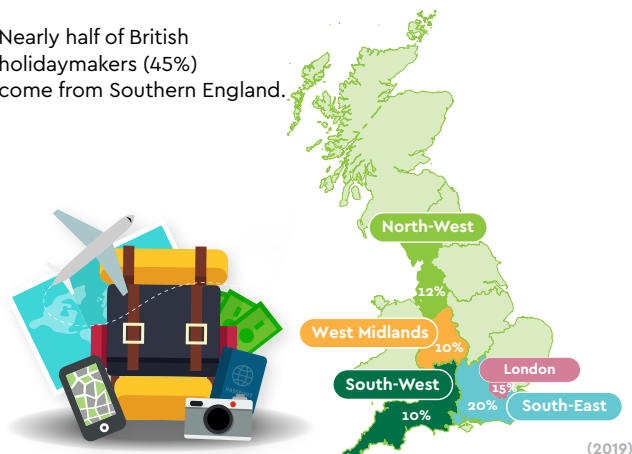
1 - 3 Nights	56%
1 - 5 Nights	69%
1 - 8 Nights	85%
9 or more Nights	15%

British holidaymakers mostly travel to Ireland for short breaks.

(2019)

Where Holidaymakers Are From

Nearly half of British holidaymakers (45%) come from Southern England.



(2019)

Source: Fáilte Ireland Survey of Overseas Travellers (2007-2019)

1. Fáilte Ireland Consumer Testing (Innovation Screener) (2017)

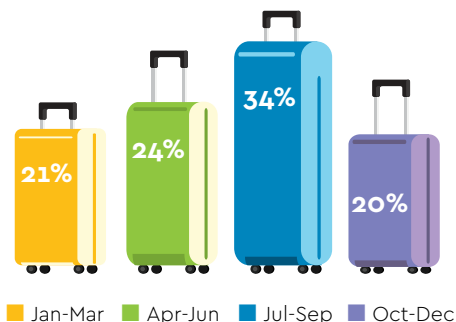
2. Tourism Ireland Covid Research (2021)

3. The fare to/from Ireland and at least one other element (such as accommodation, car hire etc) was paid fully or partly in advance

BRITISH HOLIDAYMAKER TRENDS

When Holidaymakers Travel

British holidaymaker trips were the most evenly distributed across the year of all overseas markets.



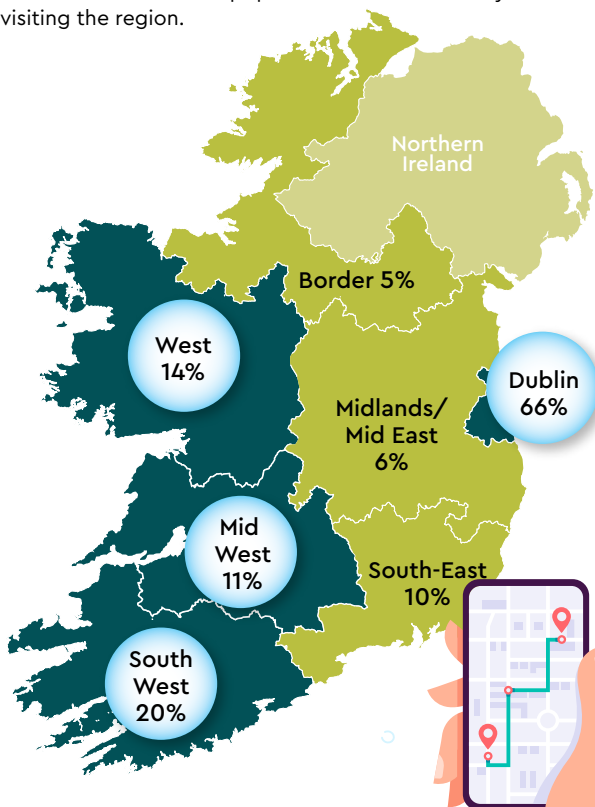
(2019)



Where Holidaymakers Visit

The capital was increasingly a popular destination for British holidaymakers pre-Covid, two thirds (66%) included Dublin in their trip (up from 59% in 2016).

The South-West is also popular with 20% of holidaymakers visiting the region.

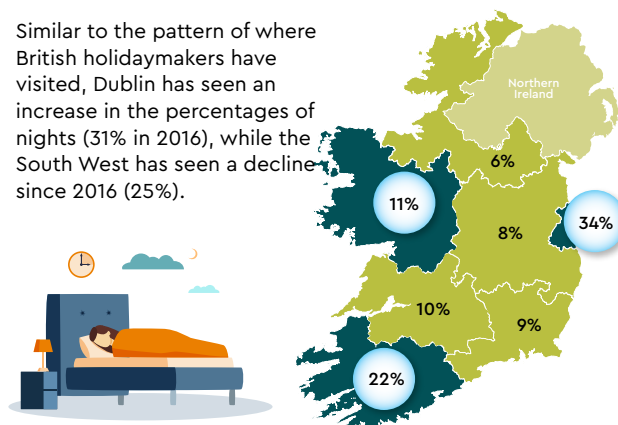


British Holidaymakers Regions Visited

(2019)

Where Holidaymakers Stay Overnight

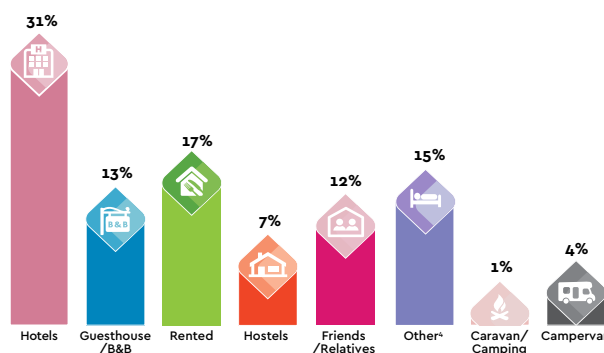
Similar to the pattern of where British holidaymakers have visited, Dublin has seen an increase in the percentages of nights (31% in 2016), while the South West has seen a decline since 2016 (25%).



British Holidaymaker Nights Spent in Regions

(2019)

Holiday – Accommodation Nights



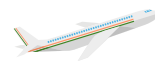
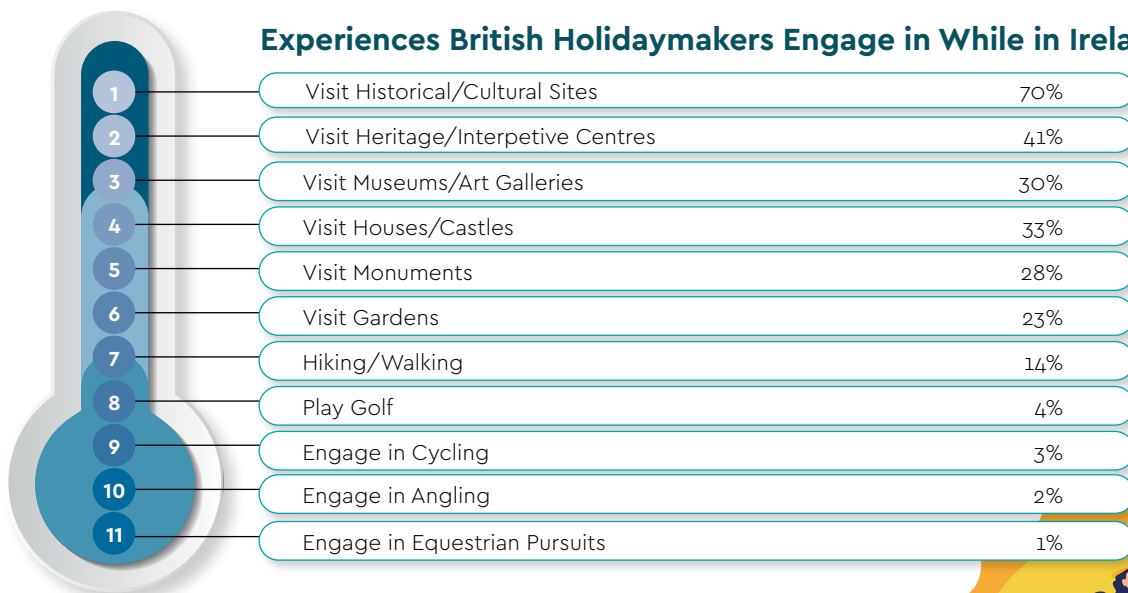
British Holidaymaker Nights Spent by Accommodation Type

(2019)

THINGS TO SEE AND DO ON HOLIDAY (PRE-COVID)

Remembering that pre-Covid British holidaymakers in the main travelled to Ireland for a short break, most prefer activity at a relatively relaxed pace. Easy walking is their favoured way to sightsee, in both urban and rural settings.

Experiences British Holidaymakers Engage in While in Ireland



Excellent Experience Drives New Business

Due to close proximity, British holidaymakers may feel like they know what Ireland has to offer and that it might be similar to what is available closer to home. By highlighting what is unique about Ireland's tourist experience and then ensuring high satisfaction levels when on holiday, the promise of a repeat visit or a recommendation to others is never too far away.

Importance of Holidaymaker Recommendations and Online Presence⁵



When considering a destination, holidaymakers rely extensively on recommendations from friends and family alongside the Internet. This is particularly true for British holidaymakers.

- 59% use family and friends and 40% utilise the Internet as a valued source of information when choosing a holiday destination.
- 71% use the Internet and 40% seek recommendations from family and friends when planning their holiday.



How To Ensure The Best Possible Experience?

- When evaluating the 'sticker price' of something in a different currency (e.g. euro to sterling), there can be a perception of paying 'more', which can make Ireland seem more expensive for British holidaymakers; therefore ensure value for money, in any currency, and go the extra mile for tourist satisfaction.
- Uniquely Irish experiences - music, food and craic all add to a holiday experience and differentiate Ireland from home. Provide recommendations for how British holidaymakers can authentically immerse themselves in Irish culture.
- For a short break, time is of the essence, offer itinerary options and showcase all there is to see and do locally.
- Accessing nature close to urban centres will provide a means for the British to get the best of both worlds of urban and rural experiences.

How to take advantage of Market Opportunities?

- As a market who predominantly travels independently to Ireland, getting the marketing message right is key, especially through digital channels.
- British holidaymakers who enjoyed their time in Ireland can also become an extension of Ireland's salesforce endorsing Ireland to friends and family on returning home.
- Join the dots for how the British can engage in 'only available in Ireland' experiences. Provide examples of compact itineraries to help this market to visualise a short break in Ireland, highlighting all the practical information required to make getting out and about easy for this market.

