



» Future Market Potential

In market research commissioned by Fáilte Ireland in 2013, nearly 15,000 interviews were conducted across the Irish and four key overseas markets of Britain, France, Germany and the Netherlands.

The following sets out the 'core' market potential opportunities and challenges for the angling offer in Ireland.

- The highest core market for angling exists in the German market in particular followed by the French and British markets. Although it could be said that the potential is quite diluted amongst these large populations.
- Although the core market potential isn't as high in Britain, Ireland appears to have a good market share in the British market already with nearly 50% of overseas visitors originating in Britain, so this could represent Ireland's best overseas prospects.
- The Irish market also has a very strong interest in angling, with a core market potential of nearly half a million people.

» Angling

MARKET RESEARCH 2013

» Current Market Performance

Share by market:

- Britain (46%)
- European (47% - of which France 12%; Germany 11%);
- North America (5%)
- Other long haul (3%)



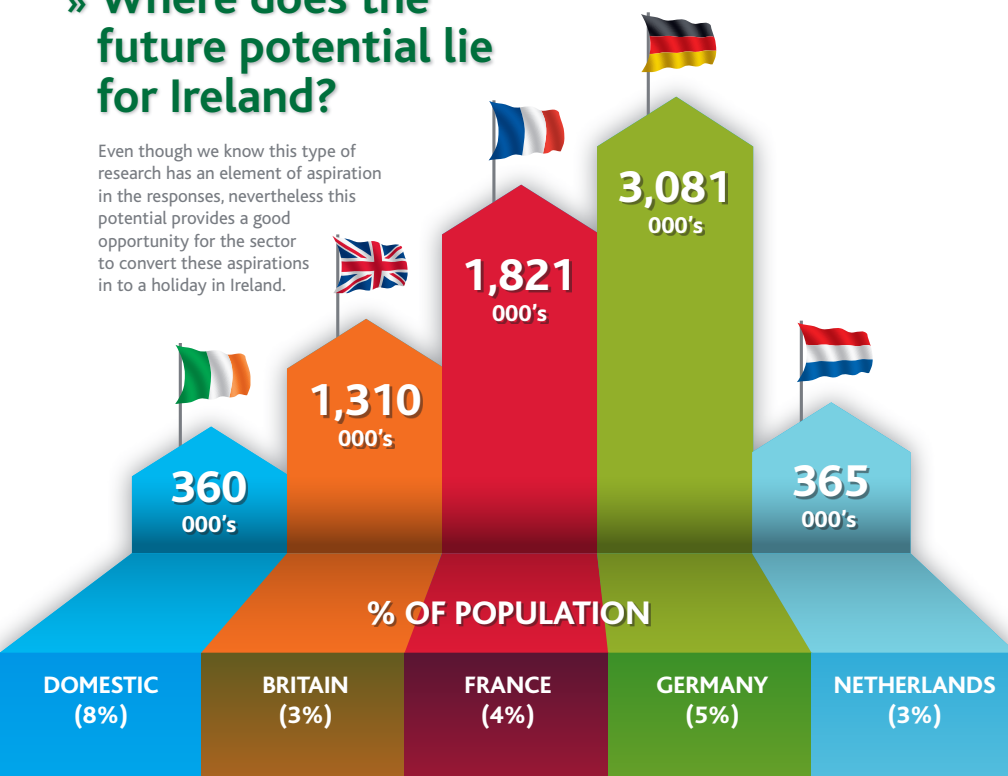
Sea angling is the most popular form of angling, followed by game and coarse. The average spend of the overseas angling visitor was €858 in 2011 as against €470 by the overseas visitor. Angling visitors stayed an average of 12 days in 2011 against 8 days for overseas visitors. Overseas anglers tend to return to Ireland, 64% are repeat visitors compared to 35% of all holidaymakers, four in five of British holidaymakers who fish have been to Ireland before.

» Who are our competitors?

- In Britain, success in attracting anglers to Ireland will depend on getting the British out of their own country to do so.
- England (83%), Scotland (77%) and Wales (74%), provide stiff competition for Ireland.
- Even Spain (76%) is slightly preferred by the British market compared to Ireland where 73% of the British core market potential would consider Ireland for an angling holiday. This popularity may well be due to the weather and the popularity of this destination amongst the British holidaymaker in general.
- In the Irish market, angling has probably the least competition from outside competitors than for any other activity with a large proportion of anglers (76%) already having participated in angling on a holiday or break in Ireland in the last two years.
- A reasonably low proportion of Irish respondents go elsewhere for angling, with the highest proportion going to England (14%) and Scotland (14%).

» Where does the future potential lie for Ireland?

Even though we know this type of research has an element of aspiration in the responses, nevertheless this potential provides a good opportunity for the sector to convert these aspirations in to a holiday in Ireland.



¹ Core Market Potential: those that have participated in this activity whilst on holiday abroad in the last 2 yrs, and would consider participating in this activity on holiday in Ireland in the next 3 yrs.

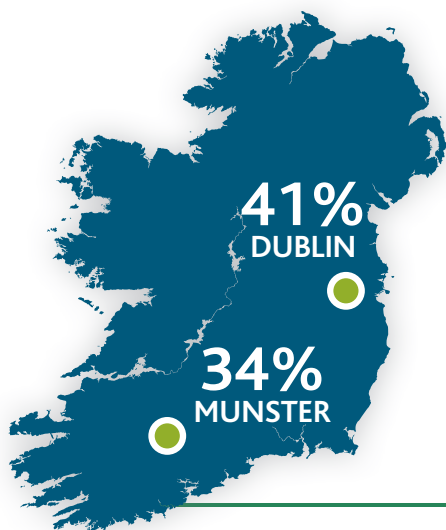
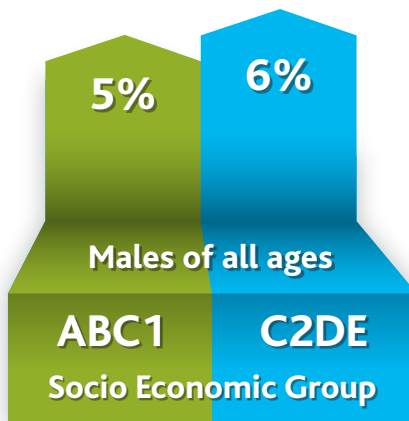
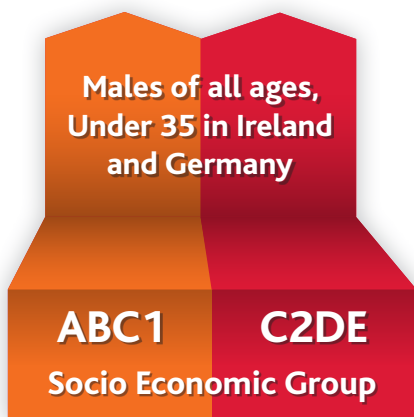
» Market Profile - Who are these people?



IRELAND &
OVERSEAS MARKET



BRITISH MARKET



Within the overseas
markets of Britain and
France, no particular
regions stand out and
potential seems to be
spread evenly.

» Key Points on Angling in Ireland

- The highest core market potential exists in the German, British and French markets, with a combined core market potential of almost 6.2 million people
- Ireland appears to have a good market share in the British market with nearly 50% of current overseas anglers originating in Britain, therefore this possibly represents Ireland's best overseas prospects.
- The Irish market also has a very strong interest in angling, with a core market potential of nearly half a million people.
- Overall the angling offer in Ireland is very well rated, and both overseas and domestic markets have a good knowledge about the product.
- Value for money and availability of trained guides are issues for the Irish market.
- Promoting Ireland as an activities destination therefore is about using Ireland's USP in same way as for general marketing; the activity is a means of enjoying the Ireland experience.



» What are people's perceptions of angling in Ireland?

OVERSEAS

- Ireland's angling was well rated by overseas respondents who are aware/familiar it, with noticeably high levels of respondents rating the 'quality of the offer', 'range of choice' and 'value for money' as excellent.
- Respondents also have a very high level of knowledge/ awareness of the angling offer in Ireland. However more could be done to improve awareness around 'availability of trained guides' and 'availability of equipment'.

DOMESTIC

- The quality and range of choice of Ireland's angling offer is also very well rated by Irish people.
- However value for money and availability of trained guides were areas of weakness.