



## » Sailing

MARKET  
RESEARCH 2013

### » Current Market Performance

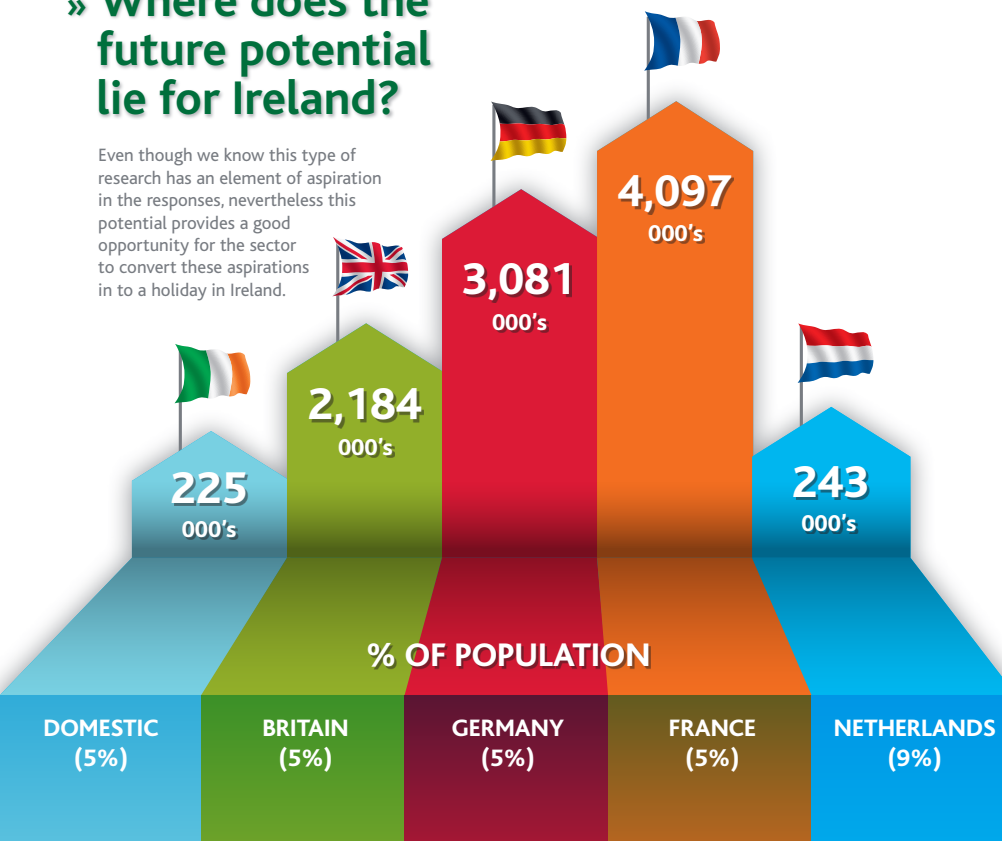
Share by market:

- Britain (43%)
- Other European (39% - including France 11%; Germany 12%);
- North America (29%)
- Other (3%)



### » 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.



## » 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 sailing offer in Ireland.

- Sailing in this research refers to yachting, cruising (both inland and coastal cruising), sail and motor boating etc. There are distinctions between these activities which were not made in this research, therefore the general nature of the activity should be remembered when referencing the data presented here.
- France provides the highest core potential market for sailing for Ireland at 9% or just over 4 million people.
- There is also a good degree of interest in sailing in the Irish market, with the core potential close to half a million people.

### » Who are our competitors?

- In common with other activities, one of the biggest challenges for Ireland will be to get people to travel outside their own country to undertake these activities.
- In the key French market, the main competition comes from within France itself (88%), followed by Spain (75%), and Italy (71%). This is possibly due to warm weather.
- Whilst 53% of the French core potential market would consider sailing whilst on holiday in Ireland.
- In the Irish market, sailing has a relatively low proportion (51%) of participants who have participated whilst on holiday in Ireland.
- Sailing potential in the domestic market is open to overseas competition, with Spain in particular posing strong competition (22%).

<sup>1</sup> 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.

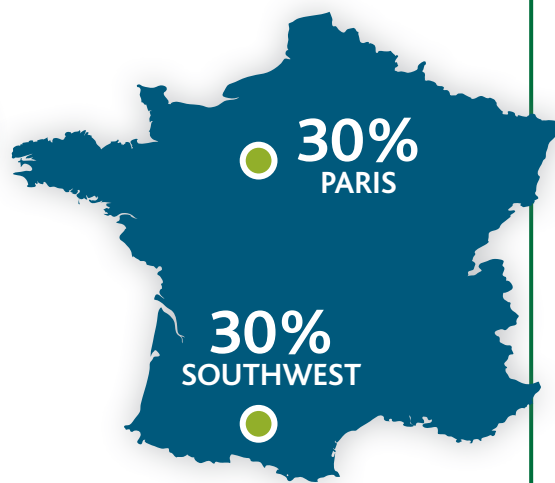
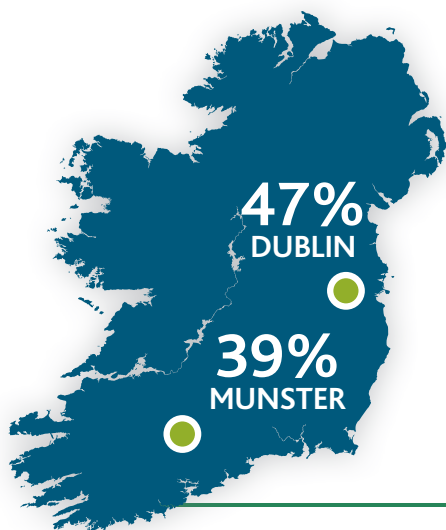
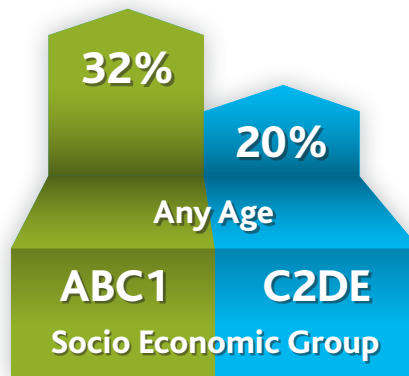
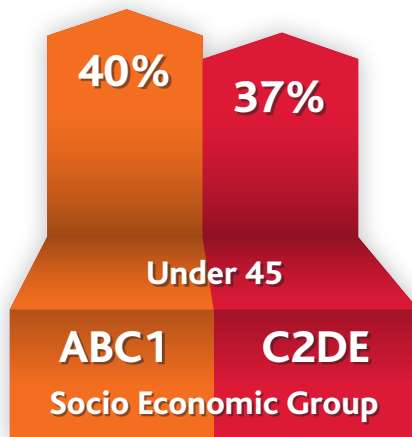
## » Market Profile - Who are these people?



IRISH MARKET



FRENCH MARKET



## » Key Points on Sailing in Ireland

- The greatest potential for sailing in Ireland exists in the French and domestic markets with a combined core market potential of almost 4.3m people
- However the domestic sailing market is particularly vulnerable to competition with Spain in particular posing strong competition
- Awareness of what Ireland has to offer is particularly low for sailing, and this applies to both the domestic and important French market.
- What can be seen across all activities is that beautiful landscape is the main reason for coming to Ireland.
- Activity-doers on the whole appear to think destination first and then consider whether it would be good to do a particular activity there.
- 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 sailing in Ireland?

### OVERSEAS

- For those aware of the Irish sailing product on offer it wasn't particularly well rated on cost, quality, and range of choice or in the practicalities of booking, availability of information and availability of berthing facilities.
- Awareness of what Ireland has to offer is particularly low in the important French market and this also applies to the Irish market.
- This was the case across all the attributes associated with sailing including value for money, quality, infrastructure and range of choice, to the practicalities of booking and availability of information.

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**Sailing and kite-surfing should be advertised more because Ireland has good potential for these activities**

25-34 year old Briton, male

### DOMESTIC

- A high level of Irish people didn't have an opinion on Ireland's sailing offering, which is perhaps partly influenced by the lower number of people participating in this activity in Ireland than has been seen for other activities.
- However amongst the proportion that are familiar with the offering, quality and range of choice are rated well, but there are issues around availability of information, availability of berthing facilities and value for money, making Ireland vulnerable to overseas competition.

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**Ensure facilities for a short visit i.e. can you do 1-2 hours sailing or canoeing without bother?**

55-64 year old Irish, male