



» Watersports

MARKET RESEARCH 2013

» Future Market Performance

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 watersports offer in Ireland.

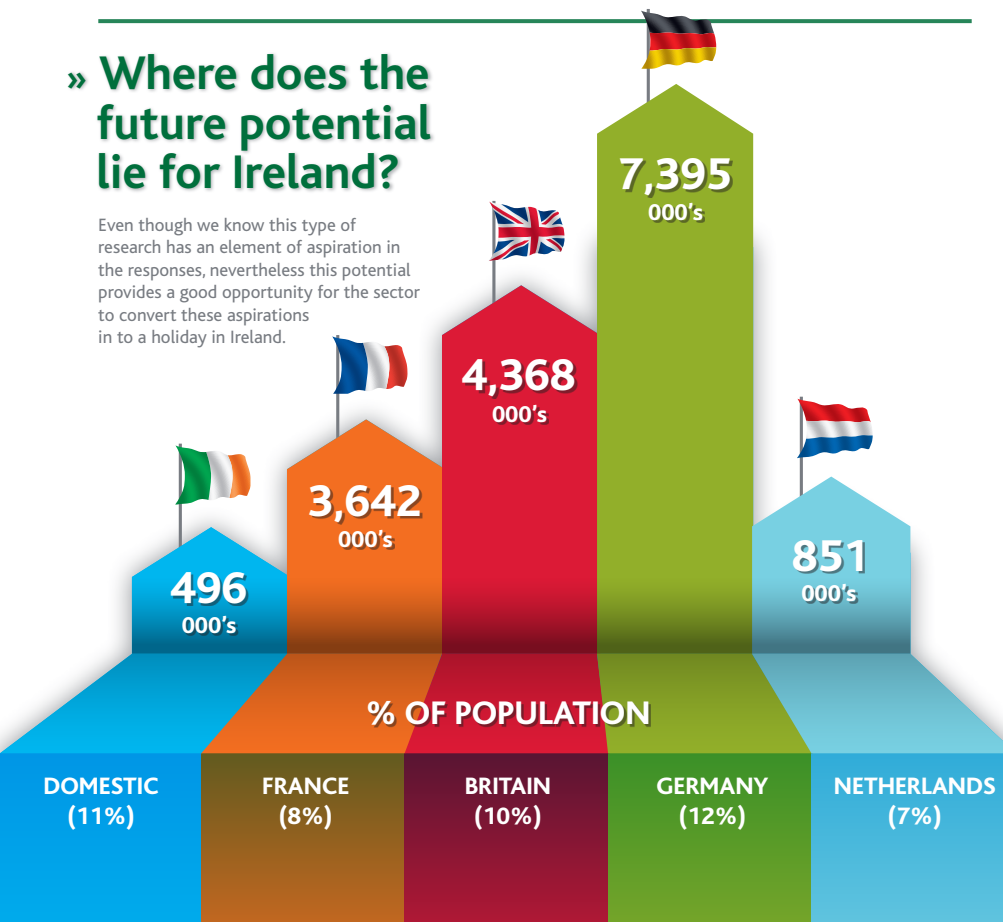
- As part of this research watersports refers to kayaking,

diving and surfing specifically, but not angling and sailing which were surveyed separately.

- Germany and Britain all offer a high 'core' market potential for watersports, followed by France which has less but still some potential.
- The domestic market also has high core potential of 11% of the population, or over 855,000 people.

» 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.



» Current Market Potential

In 2011, 86,000 overseas visitors engaged in watersports (other than sailing and angling) in Ireland, spending approximately €65m.

Of these, surfing was the most popular activity followed by canoeing. Diving and windsurfing were also mentioned but only by a very small percentage.

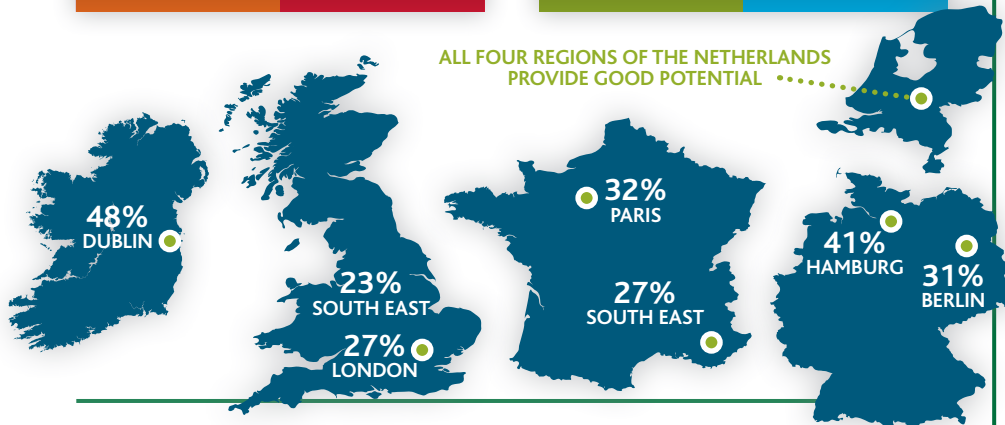
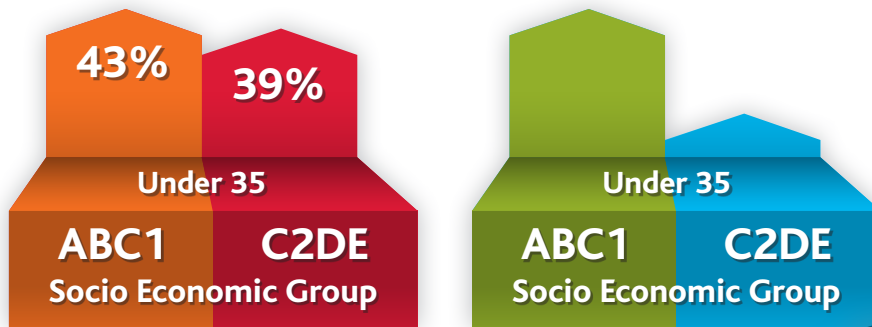
» Who are our competitors?

- As for activities in general, one of the biggest challenges for Ireland will be to get people to travel outside their own country to undertake these activities.
- Perhaps unsurprisingly for watersports warm weather plays a significant role in people's choice of destination which is why countries like Spain, Italy and France rank higher than Ireland
- BRITAIN: Spain (80%), England (79%) and France (76%) provide the greatest competition for watersports.
- 65% of the core market potential in Britain would consider participating in watersports on holiday in Ireland in the next three years.
- FRANCE: France (89%), Spain (74%) and Italy (70%) are the main destinations. Again the warmer countries tend to fare better for watersports.
- However 53% of the French core market potential would consider Ireland for a watersports holiday in the next three years.
- GERMANY: Germany (83%), Spain (80%) and Italy (72%) provide the greatest competition with 62% considering Ireland.
- Domestically, 53% of respondents have participated in watersports in Ireland.
- However Ireland's watersports offering is open to strong competition particularly from Spain where 32% have participated in this activity. Again this may reflect where this Irish cohort generally holiday.

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?

 IRISH MARKET  OVERSEAS MARKET



» Key Points on Watersports in Ireland

- The potential for watersports activities amongst the British, French, German and domestic markets is quite good with a combined core market potential of almost 16m people.
- This market potential is however open to very strong competition from warm weather countries such as France, Spain and Italy in particular.
- However for those that were aware of what Ireland had to offer, it wasn't rated very well, across all aspects of the offering.
- This could be due to the fact that a significant proportion of the overseas markets are unaware of what Ireland offers in relation to watersports. This is across all areas related to price, value, quality and the practicalities involved in booking and participating.
- The Irish are more critical of the watersports offering, with value for money seen as key.
- In the domestic market, awareness of the offer, particularly in relation to the practicalities of getting a trained guide and availing of equipment needs to be improved, and may in fact improve perceptions of the product overall.
- Watersports has probably the most to do in the area of promotion and raising awareness, as the core potential markets for these activities are quite good.
- 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.
- The holiday experience is what matters in destination choice; whether the country is set up for activities comes second for most.
- 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 watersports in Ireland?

OVERSEAS

- Ireland watersports product on offer doesn't rate particularly well, with a noticeable trend towards 'satisfactory' or 'poor', across all attributes from value for money, quality of the offer, range of choice etc, to the practicalities of booking, availability of information, availability of trained guides and availability of equipment.
- Awareness across all areas of the offering is also quite low, therefore this lack of awareness could also be the reason that the watersports product on offer was rated so poorly by people.

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I've not considered Ireland for watersports as I imagine it's like the UK- so unless there are very good conditions for sailing, surfing etc it would put me off

45 - 54 year old Briton, male

DOMESTIC

- In general Irish respondents were quite critical of the watersports offering.
- Value for money was a major issue with 27% rating this as poor.
- There also seemed to be a lack of awareness even amongst Irish people about the practicalities of booking this activity, availability of trained guides, and availability of equipment.

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I live close to a surfing beach and have my own wetsuit and board but it's not an easy spot for tourists to get to and the equipment provided is a bit dated

25 - 34 year old Irish male