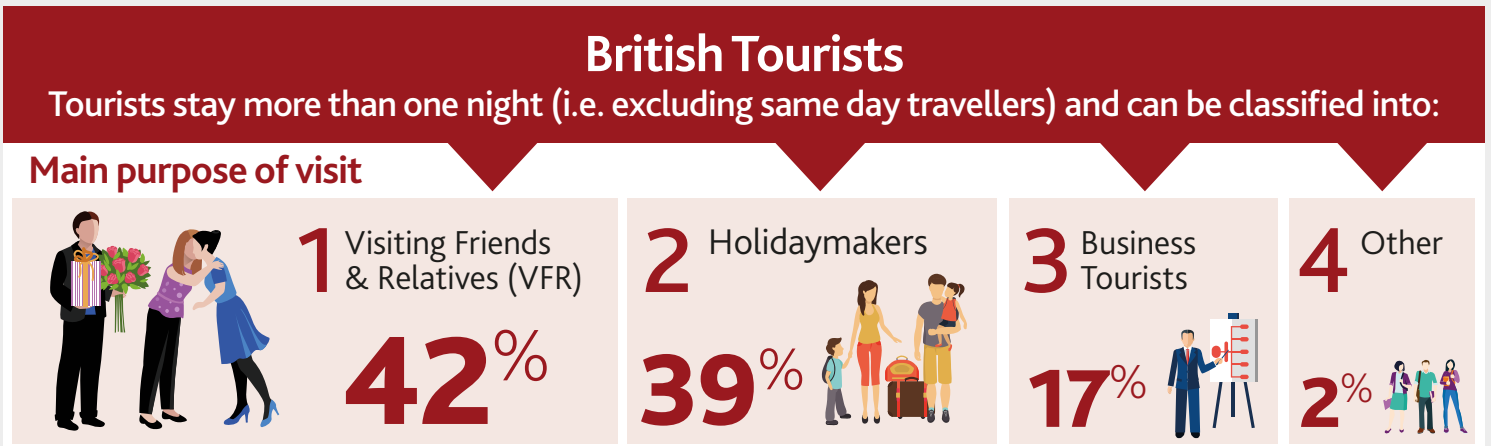


TRAVEL PROFILE: Britain



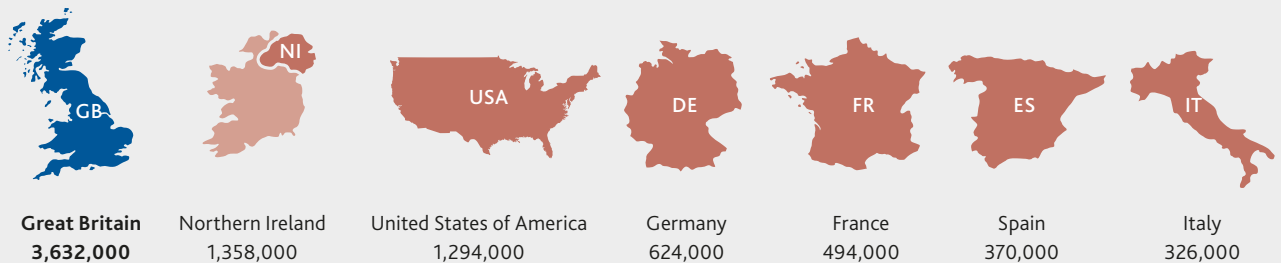
1. Tourist Numbers & Revenue

Britain is the single largest source market for Ireland in terms of tourist numbers and has seen growth rates of 11% and 9% in 2015 and 2016; however 2017 looks more challenging.

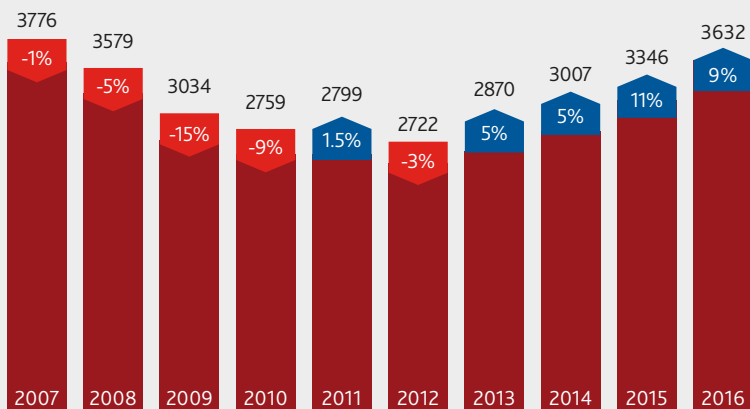


This travel profile looks at (1) the overview of tourist numbers and revenue (figures include holidaymakers, visiting friends and relatives, business tourists and others combined), then (2) focuses on the British holidaymaker specifically, and finally (3) looks at what holiday activities and experiences interest potential British holidaymakers to Ireland.

Where Do Ireland's Tourists Come From?

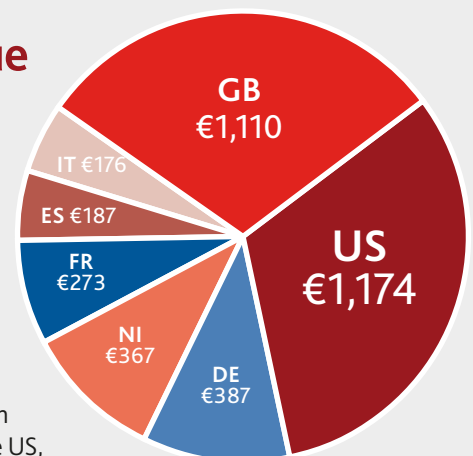


Trend in British Tourist Numbers (000s)



Britain provides Ireland with a broadest mix of tourists across holidaymaker, VFR and business tourists of all markets.

Revenue (€m)



GB is second in revenue to the US, whose tourist numbers include a higher proportion of holidaymakers - who stay longer and consequently spend more.

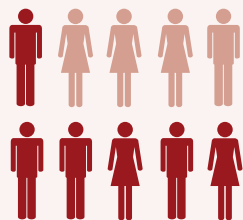
2. British Holidaymaker Profile

42% of British tourists cite visiting friends and relatives as the main purpose of visit to Ireland with a further 39% visiting for a holiday.

British holidaymakers are relatively young; 74% are under 55. When in Ireland 56% use hotels and a further 16% use guesthouses and B&Bs. They travel mainly to Ireland for short

breaks - over half (52%) will stay up to 3 nights, and nearly three quarters (72%) stay less than 5 nights.

The British are looking for experiences that **set Ireland apart from home** and that will inspire them to travel. Experiences that highlight Ireland's **authentic culture** perform well.



Profile of British Holidaymakers

Six in ten British holidaymakers (60%) are repeat visitors to Ireland, 5% are Irish born and the balance (35%) are visiting for the first time.

Travel Arrangements

Nearly all British holidaymakers (94%) travel independently to Ireland, with 6% on a package or inclusive trip - where the fare to/from Ireland and at least one other element (such as accommodation, car hire etc) was paid fully or partly in advance.



94%



6%

Holiday Party Type

Looking at the long term trend since 2000, adult groups have steadily increased in importance.

1 Couple



39%

2 Adult Group



27%

3 Alone



20%

4 Family



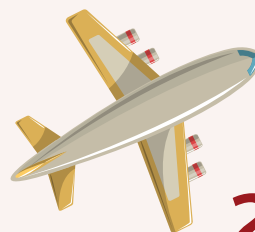
14%

Ireland is seen as a short break destination with only 28% of British holidaymakers choosing to stay more than 5 nights.

Age (2016)		Length of Stay (2016)	
Under 19 Years	7%	1 - 3 Nights	56%
19 - 34 Years	35%	1 - 5 Nights	72%
35 - 54 years	32%	1 - 8 Nights	87%
55 - 64 years	13%	9 or more nights	13%
65+ years	12%		

Travel Routes

British holidaymakers, typically travel to Ireland by air (75%) and 25% travel by sea.



75%

25%



Where Are They From?

Over half of British holidaymakers (54%) come from South or North-West Britain.

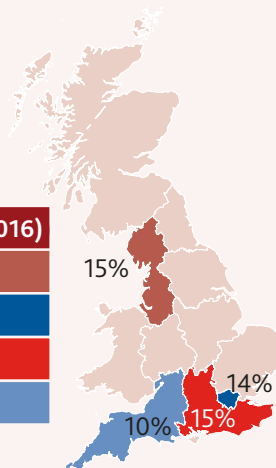
Region of Residence (2016)

North-West 15%

London

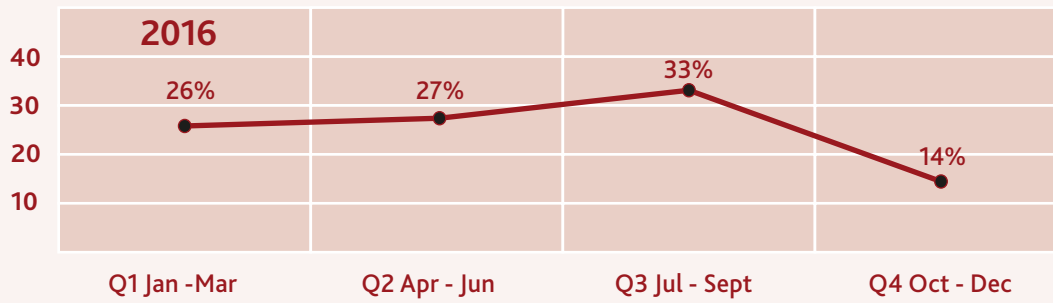
South-East 14%

South-West 10%

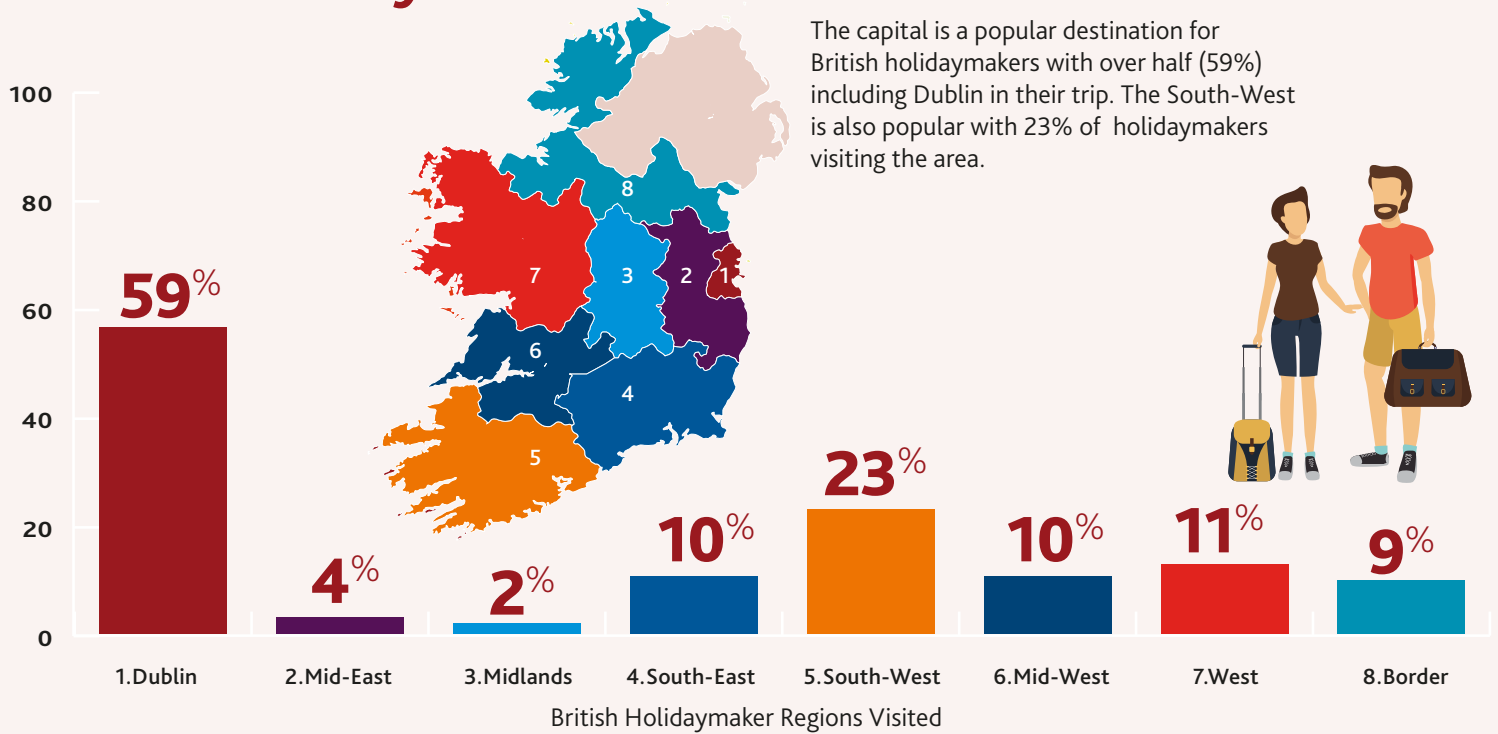


2. British Holidaymaker Profile

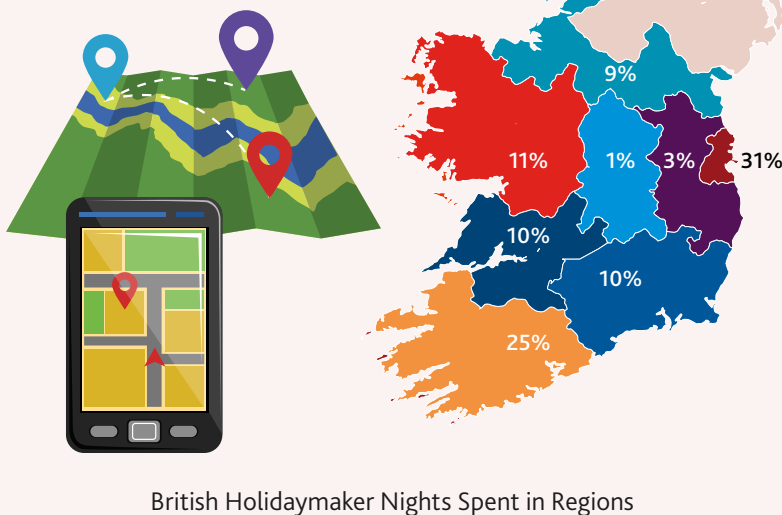
When Do They Travel?



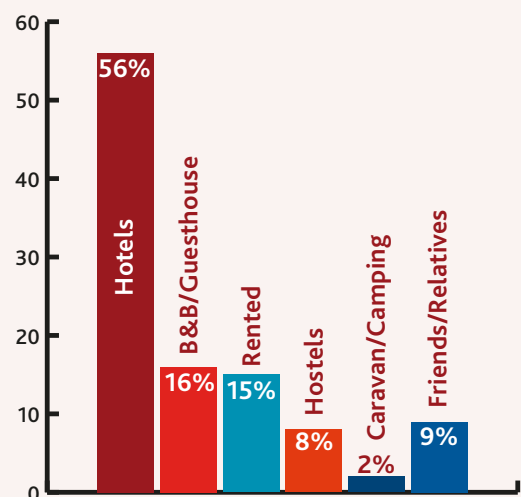
Where Do They Go?



Where Do They Stay?



Holiday - Accommodation Used (%)



3. British Holiday Travel Choices

What Types Of Holiday Are The British Looking For?

The British would consider visiting Ireland for city breaks, holidays in a rural destination, touring and to celebrate a special occasion. Visiting friends and relatives is also an important consideration in line with the close ties between Britain and Ireland and the high proportion of VFR tourists.



The British would definitely consider taking this type of holiday in Ireland in the next three years

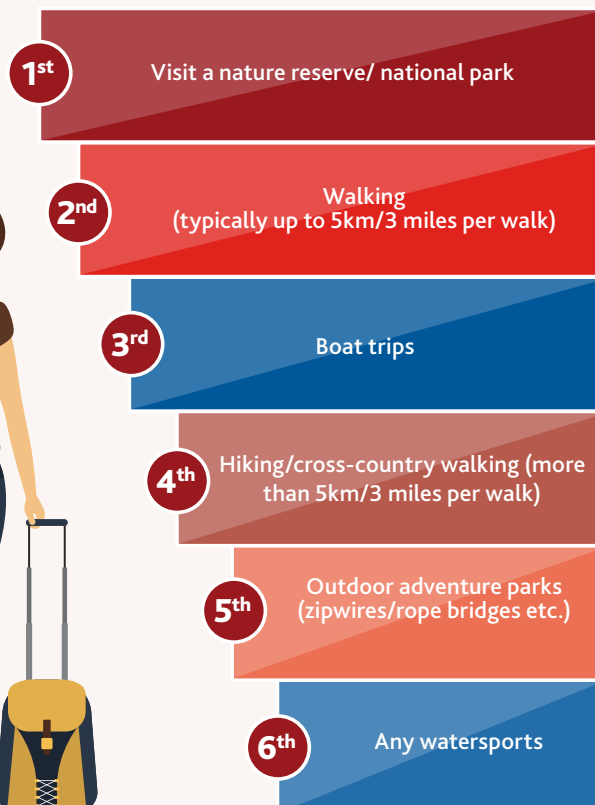


What Activities Do The British Typically Do On Holiday?

- ▶ Both gentle walking and hiking appeal to the British market as a means of exploring and getting out in nature
- ▶ Visiting nature reserves and boat trips are something this market like to do on holiday and would look to do in Ireland also
- ▶ Activities that the British typically participate in on holiday abroad match what they would see themselves doing if holidaying in Ireland.



Type of holiday activities the British would consider doing while on holiday in Ireland?



3. British Holiday Travel Choices

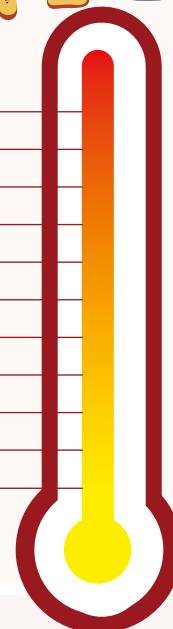
Things To See And Do On Holiday

- ▶ Experiences that differentiate Ireland from home highlight our authentic culture and allow the British to get a sense of what Ireland is all about
- ▶ Spectacular scenery and a chance to see the coast from the water is something that interests this market for a new perspective



Experiences interested in doing in Ireland	
1	Sit outside a pub/cafe and people watch
2	Spend an afternoon exploring/strolling around a picturesque town
3	Listen to live traditional music in a local pub
4	Go whale and dolphin watching off the West Coast
5	Take a trip to the rugged, remote islands off the coasts
6	Experience the local music and entertainment scene (nightlife)
7	Take a boat tour around Ireland's coastal villages
8	Visit tombs and historical sites older than the pyramids
9	Visit a festival celebrating local culture, food and heritage
10	Walk along some of the highest cliffs in Europe
11	Learn about Ireland's whiskey and beer making traditions on a brewery/distillery tour

%
48%
45%
41%
40%
37%
36%
35%
33%
33%
32%
31%



Enhancing The Holiday Experience

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

How Can We Ensure They Have The Best Possible Experience?

- ▶ The impact of Brexit and volatility of sterling make it more expensive for the British to holiday in Ireland; what is it about Ireland that is a must see for them?
- ▶ Uniquely Irish experiences – music, food and craic all add to a holiday experience. Can we provide recommendations for how they can authentically immerse themselves in Irish culture
- ▶ For a short break, time is of the essence, what itinerary options are on offer to provide them with an overview of what they can expect
- ▶ Walking at all levels, both easy sightseeing and more demanding trails are key activities for the British market
- ▶ What's on locally – festivals, events etc that might appeal to this market to see the real Ireland and soak up the atmosphere
- ▶ 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

