



GB Market Profile

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Size of the GB market to the island of Ireland

	2005	2006	2007	2008	2009	2010e	2011e
Outbound holiday trips (000)	41,629	41,455	42,355	47,799	40,681	41,012	44,355
Total visits (000)	4,810	4,970	4,920	4,650	3,958	3,611	3,658
Holiday visits (000)	1,726	1,815	1,863	1,674	1,020	1,045	1,101
Promotable visitors (000)	1,876	1,949	2,011	1,801	1,135	1,150	1,194
Revenue (€mn)	1,562	1,650	1,640	1,598	1,241	1,090	1,121
Revenue (£mn)	1,356	1,432	1,423	1,387	1,077	946	973

All Euro (€) / Sterling (£) conversions have been carried out at a rate of€1 = £0.86798 (Revenue does not include carrier receipts or international air and sea fares Promotable visits = Holiday, Conference/Incentive & EFL (English as a foreign language)







Holidaymakers at a glance ...

The British market remains the most important market to the island of Ireland in terms of visitors, holidaymakers, promotables and revenue.

More GB holidaymakers arrived in March (13%) than in any other month and generally British visitors are more likely to visit in the off-peak season (39%) than those from any other country.

More than one-quarter (27%) of British holidaymakers travelled to the island by sea in 2011 and almost a quarter (24%) brought their own car on their holiday. Not surprisingly given sea services provided from Britain but holidaymakers from Britain are the most likely to travel by sea and bring their own car than holidaymakers from any other market.

Almost three-quarters (72%) of holidaymakers from GB stayed came for a short break of 1-5 nights, representing the second largest short-break market.

Hotels were the most popular (30%) form of accommodation among our British visitors in 2011. Staying with Friends or Family is the second most popular form of accommodation. This form of accommodation remains more popular among British holidaymakers than any other market.

Dublin, the South-West and Northern Ireland are the top 3 regions visited by British visitors. British holidaymakers are least likely to visit more than one region than any other markets.

Most British holidaymakers are independent travellers (93%) and used the internet to book part of their trip (92%). The British are most likely to use a non-package holiday and use the internet when booking their trip than any other market.

One-third (32%) of British holidaymakers in 2011 were visiting the island of Ireland for the first time. We have more repeat holidaymakers from Britain (60%) or holidaymakers that were born on the island of Ireland (8%) than from any other market.

Three-in-ten of our holidaymakers from Britain are from the C2DE socio economic group, representing the largest portion of C2DE's across all markets.

The island of Ireland welcomes a greater portion of over 35's from Britain (69%) than from any other market. More than one-in-four (26%) holidaymakers from Britain travel alone.

Sightseeing & Culture Seeking (45%), Relaxing (15%) and spending time with family and loved ones (15%) were the top three holiday types taken in 2011. Visiting historic houses and castles remain the most popular diversion (45%) among British holidaymakers, and gardens (25%) have seen an uplift in interest in recent years. Hiking was the most popular active pursuit among the British visiting Ireland in 2011.

A third of our GB holidaymakers were from the South-East/London in 2011.

When do holidaymakers arrive?

Month Of Arrival	2005	2006	2007	2008	2009	2010	2011
January - March	16%	18%	12%	21%	19%	21%	23%
January	3%	6%	2%	6%	6%	6%	3%
February	6%	6%	4%	8%	5%	5%	7%
March	6%	6%	6%	7%	7%	10%	13%
April	7%	10%	7%	7%	7%	8%	8%
May	9%	14%	9%	11%	11%	6%	11%
June	12%	9%	13%	12%	9%	11%	12%
July	12%	11%	13%	9%	15%	12%	10%
August	16%	14%	16%	12%	11%	14%	12%
September	10%	9%	11%	9%	10%	10%	9%
October	7%	7%	9%	9%	8%	10%	8%
November	8%	5%	5%	6%	6%	4%	6%
December	3%	3%	5%	3%	3%	4%	2%
October - December	19%	14%	19%	19%	17%	18%	15%







When did holidaymakers decide to visit?**

Month Decided to visit	2005	2006	2007	2008	2009	2010	2011
Pre-September (previous year)		4%	4%	5%	5%	6%	8%
Oct-December (previous year)		18%	17%	20%	14%	17%	26%
January		15%	12%	15%	14%	11%	9%
February		11%	7%	9%	9%	11%	10%
March		10%	12%	9%	9%	9%	9%
April		8%	9%	7%	8%	7%	7%
May		8%	9%	9%	9%	7%	7%
June		7%	8%	6%	10%	10%	6%
July		5%	6%	7%	8%	8%	5%
August		6%	7%	4%	9%	5%	6%
September		5%	6%	7%	5%	6%	4%
October		1%	1%	1%	1%	1%	0%
November		0%	1%	2%	1%	1%	1%
December		0%	0%	0%	0%	0%	0%

^{*} some misattribution into previous year (Pre September and Oct-December

When did holidaymakers make a reservation?**

Month reserved part of trip	2005	2006	2007	2008	2009	2010	2011
Pre-September (previous year)		1%	1%	3%	2%	3%	3%
Oct-December (previous year)		16%	15%	19%	12%	15%	22%
January		14%	12%	14%	14%	10%	9%
February		11%	7%	11%	8%	12%	13%
March		10%	10%	9%	10%	9%	10%
April		10%	9%	6%	9%	9%	9%
May		11%	11%	9%	9%	8%	10%
June		7%	12%	7%	9%	11%	7%
July		6%	8%	8%	8%	9%	6%
August		6%	7%	6%	10%	6%	5%
September*		6%	7%	7%	6%	6%	6%
October*		1%	1%	1%	0%	1%	0%
November*		1%	1%	2%	1%	1%	1%
December*		0%	0%	0%	0%	0%	0%

^{*} some misattribution into previous year (Pre September and Oct-December

How do holidaymakers travel to the island of Ireland?

Air vs. Sea	2005	2006	2007	2008	2009	2010	2011
Air	74%	76%	72%	81%	77%	73%	73%
Sea	26%	24%	28%	19%	23%	27%	27%

What is the length of stay for holidaymakers on the island of Ireland?

Length of stay	2005	2006	2007	2008	2009	2010	2011
1-5 nights	66%	64%	57%	68%	72%	66%	72%
6-8 nights	19%	21%	24%	19%	19%	22%	14%
9-14 nights	11%	11%	14%	7%	6%	9%	11%
15+ nights	4%	4%	6%	5%	3%	3%	3%
Average number of nights	6.1	5.7	6.3	5.9	5.0	6.3	5.3

Where do holidaymakers stay? (Distribution of bednights)

Accommodation	2005	2006	2007	2008	2009	2010	2011
Hotels	28%	34%	29%	27%	28%	28%	30%
Guesthouses & B&B's	18%	20%	16%	13%	11%	11%	11%
Rented	20%	20%	26%	24%	21%	19%	14%
Caravan/Camping	3%	5%	5%	3%	2%	2%	2%
Friends & Relatives	26%	16%	14%	18%	22%	20%	24%
Other	5%	6%	10%	15%	17%	20%	19%







Where do holidaymakers visit on the island of Ireland?

Regions visited	2005	2006	2007	2008	2009	2010	2011
Dublin	57%	51%	43%	48%	47%	44%	52%
Midlands East	8%	8%	8%	7%	7%	6%	5%
South Eastern	11%	10%	13%	6%	10%	8%	6%
South West	22%	28%	29%	24%	25%	21%	24%
Midwest	9%	16%	13%	11%	11%	8%	5%
Western	15%	15%	14%	16%	15%	14%	6%
Northwest	4%	3%	5%	4%	5%	5%	2%
Northern Ireland	6%	5%	7%	8%	9%	18%	15%

How many holidaymakers use a car?

Car Usage	2005	2006	2007	2008	2009	2010	2011
Car Not Used	62%	53%	48%	58%	63%	56%	65%
Car Hire	16%	24%	27%	27%	19%	19%	12%
Car Brought	22%	22%	25%	15%	18%	25%	24%

How do holidaymakers make their travel arrangements?

Travel Arrangement	2005	2006	2007	2008	2009	2010	2011
Package	14%	11%	14%	10%	7%	9%	7%
Independent	86%	89%	86%	90%	93%	91%	93%

Use of internet to book part of trip**

	2005	2006	2007	2008	2009	2010	2011
Yes		80%	82%	89%	91%	88%	92%
No		20%	18%	11%	9%	12%	8%

Items booked online**

	2005	2006	2007	2008	2009	2010	2011
Air-Sea tickets		80%	77%	86%	88%	83%	84%
Accommodation		45%	54%	62%	61%	57%	56%
Car hire		13%	21%	22%	18%	18%	10%
Other		1%	2%	1%	1%	1%	3%

Sites visited if using the internet**

	2005	2006	2007	2008	2009	2010	2011
Travel Agent's website		2%	4%	3%	2%	4%	3%
Specific accommodation provider's website		19%	22%	23%	22%	16%	20%
Specific Air/Sea Carrier's website		59%	51%	63%	73%	68%	67%
General holiday search portal		12%	14%	23%	11%	13%	21%
Tourist Board's website		16%	17%	8%	8%	9%	15%
Other site with general info on Irish holidays		10%	6%	3%	6%	4%	4%
User Generated Sites e.g. Blogs / Trip Advisor		n/a	1%	1%	3%	1%	4%
Car Hire Website		n/a	9%	9%	6%	5%	6%
Social Networking Sites e.g. Facebook		n/a	n/a	n/a	n/a	n/a	1%
Other		6%	8%	3%	1%	1%	1%







Have holidaymakers been to the island of Ireland before?

Familiarity	2005	2006	2007	2008	2009	2010	2011
First visit	39%	36%	35%	31%	35%	32%	32%
Repeat visit	50%	54%	57%	61%	57%	57%	60%
Born on the island of Ireland	11%	9%	8%	8%	8%	10%	8%

What is the social class profile of holidaymakers?

Social Class	2005	2006	2007	2008	2009	2010	2011
AB	16%	25%	18%	20%	22%	31%	31%
C1	55%	51%	57%	56%	57%	44%	41%
C2	23%	16%	17%	18%	16%	18%	20%
DEF	7%	8%	9%	6%	6%	7%	8%

What age are holidaymakers?

Age	2005	2006	2007	2008	2009	2010	2011
Under 16	5%	5%	5%	5%	5%	4%	4%
16-24	13%	9%	9%	8%	14%	12%	12%
25-34	21%	18%	13%	17%	20%	20%	16%
35-44	22%	19%	18%	18%	15%	17%	18%
45-54	17%	16%	20%	20%	22%	20%	22%
55+	22%	32%	35%	32%	24%	28%	29%

Who do holidaymakers travel with?

Party Composition	2005	2006	2007	2008	2009	2010	2011
Alone	21%	18%	15%	19%	23%	21%	26%
Couple	49%	48%	54%	47%	45%	41%	40%
With family	13%	18%	15%	15%	14%	15%	12%
Other Adult Party	17%	16%	16%	19%	18%	24%	22%

Segments

Best Description of Holiday Needs	2005	2006	2007	2008	2009	2010	2011
S&CS's	47%	50%	48%	45%	41%	41%	45%
Outdoor Actives	3%	5%	6%	4%	5%	7%	4%
Family & Loved Ones	12%	9%	10%	9%	10%	12%	15%
Affinity Groups	3%	2%	2%	3%	5%	7%	9%
Luxury Lovers	0%	2%	1%	1%	3%	2%	1%
Relaxers	27%	28%	27%	30%	30%	24%	15%
Social Adventurers	7%	6%	5%	8%	7%	8%	10%

What sites of historical interest do our holidaymakers visit?**

	2005	2006	2007	2008	2009	2010	2011
Any Of The Below		60%	61%	52%	55%	56%	68%
Historic Houses/Castles		41%	43%	36%	44%	45%	45%
Monuments		30%	33%	31%	34%	36%	32%
Heritage/Interpretative Centres		30%	29%	30%	29%	31%	29%
Museums/Art Galleries		23%	25%	25%	29%	30%	36%
Other Sites Of Cultural Historical Interest		6%	14%	9%	7%	6%	17%
None Of These		40%	39%	48%	45%	44%	32%







What pastimes/events do our visitors engage in?**

	2005	2006	2007	2008	2009	2010	2011
Visited Gardens		13%	16%	14%	22%	23%	25%
Visited National Parks/Forests		n/a	n/a	n/a	21%	27%	28%
Attended An Organised Sporting Event		6%	3%	3%	5%	6%	9%
Tracing Roots/Geneology		1%	2%	2%	4%	1%	1%
Attended Cultural Event/Festival		6%	7%	8%	7%	9%	13%
Used Spa Facilities		1%	2%	2%	4%	3%	4%
None Of These		n/a	n/a	75%	60%	56%	48%

What activities do our holidaymakers engage in?**

	2005	2006	2007	2008	2009	2010	2011
Fishing		3%	5%	4%	3%	5%	4%
Equestrian Pursuits		1%	1%	1%	0%	2%	0%
Cycling		1%	2%	1%	1%	3%	2%
Golf		3%	4%	3%	3%	6%	5%
Hiking/Cross-Country Walking		10%	17%	8%	13%	14%	19%
Other Water Based Activities		2%	3%	2%	1%	3%	2%

How much travelling do our holidaymakers do in Ireland?**

Regionality Segments	2005	2006	2007	2008	2009	2010	2011
Dublin Only		40%	35%	42%	51%	42%	54%
Tourer		10%	10%	6%	3%	7%	5%
Static Regional		35%	42%	42%	38%	38%	32%
Two Bases		13%	11%	9%	6%	9%	8%

Where do our holidaymakers come from?**

	2005	2006	2007	2008	2009	2010	2011
North	1%	3%	2%	2%	4%	2%	4%
Yorkshire & Humberside	7%	7%	5%	5%	5%	5%	5%
North West	13%	9%	11%	9%	11%	11%	11%
East Midlands	8%	6%	7%	4%	3%	6%	8%
West Midlands	4%	3%	6%	9%	14%	10%	9%
East Anglia	3%	4%	5%	5%	3%	2%	3%
London (Including Middlesex)	20%	21%	17%	20%	15%	15%	13%
South East	26%	27%	25%	21%	21%	21%	20%
South West	6%	11%	9%	10%	12%	11%	13%
Wales	4%	2%	6%	5%	5%	8%	4%
Scotland	7%	7%	6%	9%	8%	8%	9%
Isle of Man/Channel isles	1%	1%	0%	1%	0%	0%	1%

data sources: Failte Ireland's Survey of Travellers (SOT) and NITB / NISRA's Northern Ireland Passenger Survey (NIPS)

** Tables annoted with two stars are extracted from the SOT only ,so while they include holidaymakers who travel to Northern Ireland via the Republic of Ireland, holidaymakers using air or sea ports in Northern Ireland are not included in the statistics.



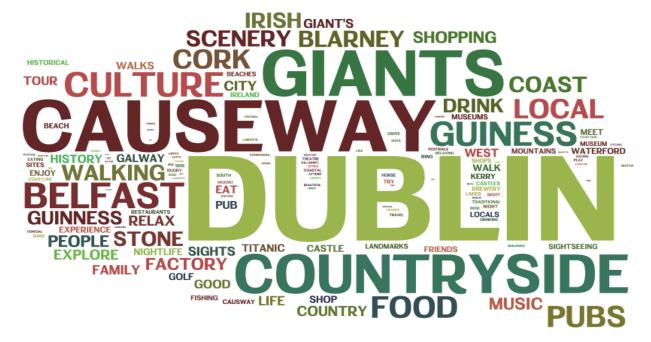




Ireland's Image

What are the top things British people hope to see, do or experience in Ireland?

source: Tourism Ireland's Global Brand Tracker 2012 - 1000 British people surveyed at home



What have first-time holidaymakers from Great Britain said about their holiday in Ireland?

source: Tourism Ireland's PromEx study 2007

We had a great time in Ireland. The characters we met and some of the stories from that contact really made the holiday.

The countryside filled with sheep and horses as well as its cliffs and magnificent scenery is probably one of its best features. However, the wonderful way the people of Ireland made us feel comfortable and welcome was also one of the best features

To me it feels like going home even though its not my home.

Beautiful countryside and the feeling of going back in time is the most unique attraction for me: small villages, great pubs, friendly people, beautiful local crafts, etc..

I felt welcomed and chatted with many

I felt like I could live there, it was a place

It is a magical, mystical feel that no other destination has on offer. Even in Dublin you sense this.

People were amazing and so friendly they just made it an unforgettable break.







After their first holiday in Ireland, what do British holidaymakers say makes Ireland unique? source: Tourism Ireland's PromEx study 2007



And what were the most memorable moments on their first holiday in Ireland?

source: Tourism Ireland's PromEx study 2007



