



Great Britain Market Profile 2007

Marketing Insights



The Size and Value of the British Market

Great Britain is the island of Ireland's largest tourism generating market delivering almost 5 million visits in 2006. This is the highest ever number of visits recorded from any market representing a growth of +3% over the 2005 visitor levels. The island received 1.8 million holidaymakers in 2006, a growth of +5%.

Great Britain (GB) to the island of Ireland								
	2000	2001	2002	2003	2004	2005	2006	06/05 % Change
Total Visits (000's)	4,294	4,306	4,523	4,762	4,761	4,810	4,970	+3%
Holiday Visits (000's)	1,690	1,675	1,810	1,837	1,787	1,726	1,815	+5%
Promotable Visits (000's)*	1,746	1,721	1,845	1,871	1,824	1,782	1,859	+4%
Revenue (€M)	1,307	1,491	1,556	1,632	1,612	1,637	1,722	+5%
Revenue (£M)	902	1,029	1,074	1,126	1,112	1,129	1,188	+5%
GB outbound** trips								
Total Visits (000's)	54,687	53,260	53,960	54,169	59,297	61,512	62,499	1.6%
Holiday Visits (000's)	35,000	33,200	32,635	33,943	39,313	41,629	41,455	-0.4%

*Promotable visits include holidaymakers, conference and incentive visitors and those who come to study English as a foreign language (EFL).

**Outbound trips are trips taken by British residents to any destinations outside Great Britain.

Exchange rate used to convert Euro to Sterling is 1 Euro = 0.69 Sterling

Conversely the general outbound market from GB has not been performing well, and outbound holiday visits did not grow in 2006. The island of Ireland has had a comparatively strong year from GB, given the stagnant outbound market in which it is competing. The island's share of the GB outbound holiday market has grown by almost half a percent.

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Where the GB holidaymakers to the island come from

Download full GB report

www.tourismireland.com/corporate

Revenue from Great Britain to the island of Ireland grew by +5% in 2006 to reach **€1.7/£1.2 billion.**

British visitors spent almost **24 million nights** on the island in 2006, an increase of +3% over 2005.

Great Britain is the island of Ireland's largest source market and accounted for **57% of total visits** and **48% of total holiday visits** to the island in 2006.



The British Travel Market

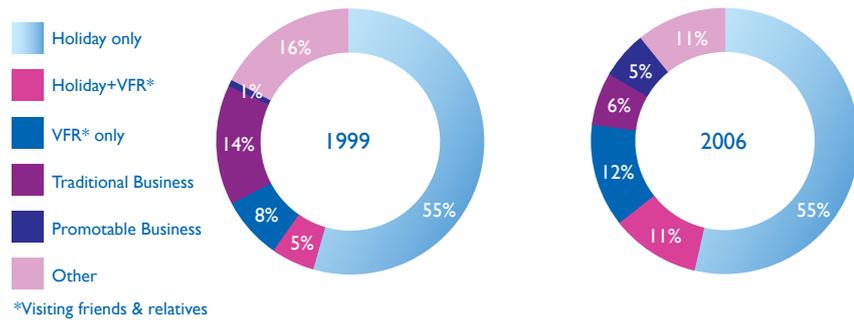
Profile of British travellers abroad



- The British spend on average **€774/£526** on a short break (1-3 nights) and €1,724/£1,172 on a long trip. The British spend **on average, less on trips to the island of Ireland.**
- The **average outbound trip length was 9.8 nights** in 2006. This is less than in 1999 when it was 10.5 nights.
- Around two thirds of the British population take overseas holidays each year and the number **taking more than 1 trip is increasing** (+15% since 2000).
- The use of the train as a means of overseas travel has increased by +3% since 2005. Coaches, buses and cars have lost some of the market, while **the plane is still the number one** mode of transport for outbound holidays, accounting for 82% of all trips in 2006.
- **Sun & beach** holidays are the main holiday type taken by the British. **Countryside holidays, touring holidays and city breaks** are also popular.

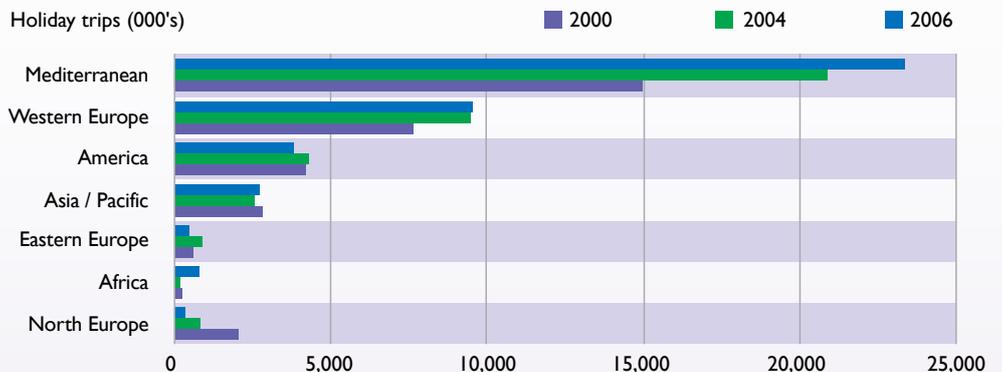
Why the British travel overseas

The number of trips taken by British visitors to visit friends and relatives (VFR) has increased since 1999 and this purpose of visit now represents 12% of all trips from Great Britain. The combination of holiday with VFR is also a growing segment, now accounting for 11% of the overseas market. Traditional overseas business trips have lost some share, while promotable business trips (conferences and incentive trips) have increased.



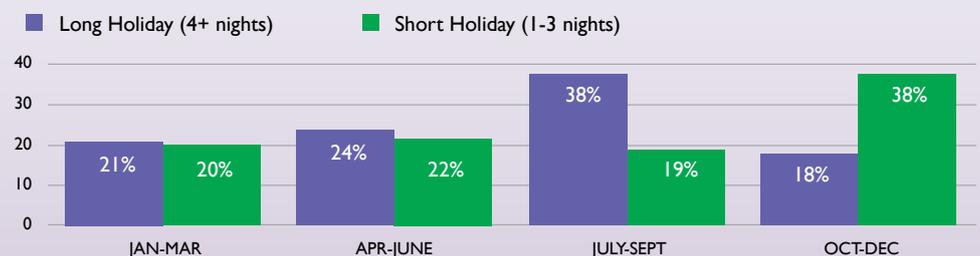
Where the British go on holidays

The Mediterranean is the most popular destination for British holidaymakers and this popularity is increasing. Western Europe is also very popular attracting almost 10 million overseas holiday trips from GB in 2006, while trips to Northern Europe have dropped. The number of GB holidaymakers to the USA has also declined despite a weak US dollar. In 2006, Spain, France and Italy remained the top 3 destinations for holiday trips from GB.



When the British go on holidays

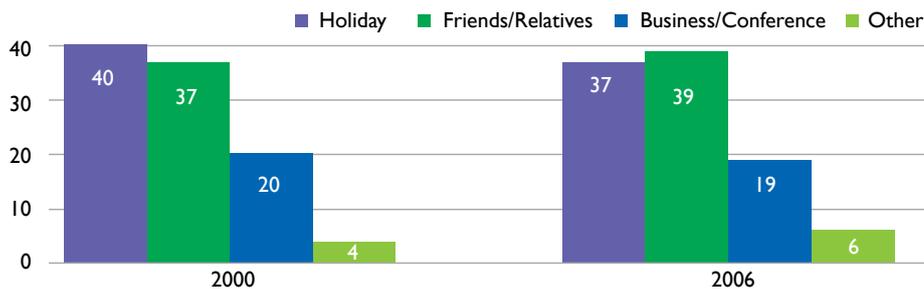
Short breaks have always been more popular in the off season. In the British market the majority of short break trips (1-3 nights) occur in the October to December period (38%), while the summer months are most popular for long holidays. The availability of low cost air travel all year round to many destinations has greatly impacted on the seasonality of outbound trips and especially the propensity for city breaks. The number of city breaks taken abroad by GB residents has grown by +23% since 2004.



The British Market to the island of Ireland

Why the British come to the island of Ireland

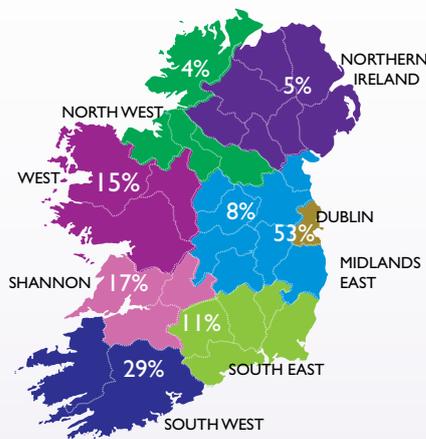
Holidays and trips to visit friends and relatives (VFR) have always been the most popular reasons for the British to visit the island of Ireland. In recent years, VFR has over-taken holidays as the main purpose of visit. The strong ancestral ties between GB and Ireland and increased low fare access have impacted on this trend.



Where they go on the island of Ireland

Dublin remains the no.1 area for holidaymakers from GB to visit while on the island of Ireland (53%). The South West is also popular (29%). The overall trend since 2000 has been towards increased visits to Dublin and Northern Ireland and less visits to other areas. However, 2006 has seen slower growth in Dublin and Northern Ireland with stronger growth to the South West and Shannon due in part to increased access and increased marketing activity.

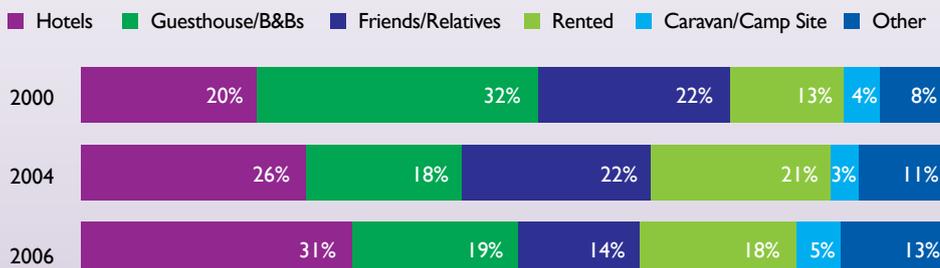
Holiday Areas (%)				
	2000	2002	2004	2006
Dublin	45	50	56	53
Midlands east	12	11	10	8
South East	24	15	14	11
South West	30	29	25	29
Shannon	13	12	12	17
West	19	16	16	15
North West	9	6	4	4
Northern Ireland	5	6	8	5
Average number of areas visited	1.6	1.4	1.5	1.4



What accommodation they use

Hotels are becoming an increasingly popular accommodation choice for GB holidaymakers to the island of Ireland. In 2006 they accounted for almost a third of all accommodation nights. Rented accommodation (18%) has also gained share over the same period.

Guesthouses and B&Bs are losing share, and have dropped from almost a third of all nights in 2000, to less than a fifth in 2006. The number staying with their friends or relatives is also decreasing.



Profile of British holidaymakers to the island of Ireland



• GB holidaymakers to the island arrive throughout the year and in 2006 almost as many arrived in **April and May (24%)** as did in the peak months of **July and August (25%)**.

• **Air transport** is the main mode of travel, **77%** of all holidaymakers used this mode of transport in 2006.

• GB holidaymakers stay an average of just **5.6 nights** on the island - this is 1.5 days shorter than the average holidaymaker and 2.5 days shorter than the average European holidaymaker.

• Over half (54%) of all holiday visits to the island in 2006 were **repeat visits** (i.e. not a first time visitor).

• The numbers **using a car** to tour the island increased slightly in 2006 to **48%** of total visits. This increase was driven by the numbers using the ferry and **bringing their own car**.

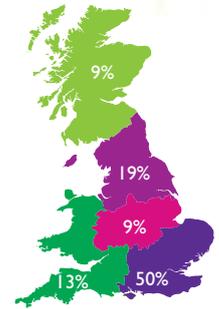
• **The Internet** continues to increase as a means of **choosing (37%)** and **planning (56%)** their holidays on the island of Ireland.



Where GB holidaymakers to the island come from

The island of Ireland attracts a much larger proportion of holidaymakers from London and the South East. 50% of all holidaymakers to the island are from this region compared with just 28% of the overall overseas holiday market. This area is the most populous area of Great Britain with 36% of the population residing there. The North of England is also a large source region (19%) for the island of Ireland

Region of Origin	% of Total population	% of abroad holidays	% to island of Ireland
London & South East	36	28	50
Central England	17	27	9
North England	25	22	19
South West	14	14	13
Scotland	9	9	9



The full GB report contains over 100 pages of invaluable information. Everything you need to know about GB visitors to the island of Ireland and how to avail of promotional opportunities **with Tourism Ireland in the market place.**

Contents of the full GB report can be downloaded at www.tourismireland.com/corporate

Country Profile:

Background information on the country.



GB travel profile:

Statistical information illustrated by charts including size of market and profile of general outbound holidaymaker.



GB to the island of Ireland:

Detailed breakdown including the size of the market and the profile, motivations and attitudes of holidaymakers visiting the island.



Car touring to the island of Ireland:

A brief synopsis of the car touring market to the island of Ireland in general (not only GB visitors).



Sightseers and Culture Seekers:

As Tourism Ireland's key target segment in 2007 this gives an overview of who they are and what messages motivate them.



Trade Structure:

How the trade operate on our behalf in the market place.



Tourism Ireland Activities:

Lists all advertising and promotional activity in the market along with cooperative opportunities.



Tourism Ireland Contacts:

Details of who's who in the GB office.



Market Profiles are also available for USA, France, Germany, the Netherlands, Italy, Canada, Australia, Spain and the Nordics



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