

4 MAIN OVERSEAS MARKETS

Introduction

Ireland's four main overseas markets deliver 70% of visitors and revenue. So, when allocating resources it makes sense to focus resources where there is best potential.

Questions	Great Britain
When do they visit Ireland?	Visit all year 31% Jan-Apr 23% May-June 22% July-Aug 9% Sept 15% Oct-Dec
Where do they go in Ireland?	Majority spend their time in one destination Short-breaks, less regional touring 53% Dublin 28% Southwest 19% West 11% Midwest
How long do they stay in Ireland?	Average 5 nights Average annual leave 28 days
What accommodation do they use when in Ireland?	33% hotels 13% rented 9% guesthouses/B&Bs 26% friends and relatives
Where are they from?	21% South East 15% London 11% South West 11% North West 10% West Midlands 8% Scotland 8% Wales

United States	Germany	France
<p>62% visit outside of July and August</p> <p>17% Jan-Apr 29% May-June 29% July-Aug 11% Sept 13% Oct-Dec</p>	<p>73% visit outside of July and August</p> <p>23% Jan-Apr 31% May-June 27% Jul-Aug 8% Sept 12% Oct-Dec</p>	<p>64% visit outside of July and August</p> <p>22% Jan-Apr 26% May-June 36% July-Aug 6% Sept 9% Oct-Dec</p>
<p>Most will visit more than one region</p> <p>Dublin is on the majority of itineraries followed by Western seaboard and Southwest</p> <p>80% Dublin 48% Southwest 35% West 32% Midwest</p>	<p>41% like to tour around 24% visit Dublin only</p> <p>65% Dublin 50% Southwest 33% West</p>	<p>Most will visit more than one region</p> <p>6% Dublin 50% West 43% Southwest</p>
<p>Average 6.8 nights (42% stay 6-8 nights)</p> <p>Average annual leave 12 days</p>	<p>Average 8.3 nights</p> <p>Average annual leave 29 days</p>	<p>Average 8.9 nights</p> <p>13% short breaks (1-3 nights)</p> <p>Average annual leave 7.5 weeks, min. 5 weeks</p>
<p>50% hotels 25% B&Bs and guesthouses 7% rented 8% hostels</p>	<p>34% hotels 25% Guesthouses/B&Bs 10% rented</p>	<p>23% guesthouses and B&Bs 20% hotels 13% rented</p>
<p>New York, California, Massachusetts, Florida and Illinois</p>	<p>Bavaria Baden-Wurtemberg, Nord Rhein/ Westphalia Rheinland-Palatinate and Hessen</p>	<p>33% from Paris 20% from Western France 14% South East 12% South West 11% Mediterranean 6% East 3% North</p>

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continued

Questions	Great Britain
What age are they?	<p>A greater portion over 35s</p> <p>48% are over 45</p> <p>Mostly couples and a quarter in other adult groups</p> <p>Less child or family focussed</p>
How do they get here?	<p>8 out of 10 air</p> <p>2 out of 10 hire a car</p> <p>2 out of 10 bring their car</p>
Have they visited Ireland before?	<p>59% previously visited</p> <p>Visiting friends and relations (VFR) is big from the GB market</p>
Will they return to Ireland?	<p>76% will return</p>
Is the language important to them?	<p>N/A</p>

United States	Germany	France
<p>Slightly older than European visitors, 25% are over 55</p> <p>44% are over 45</p> <p>Almost half visit as part of a couple</p>	<p>22% are under 24</p> <p>24% are 25-34</p> <p>16% are 35-44</p> <p>38% are over 45</p> <p>39% couple</p> <p>12% family</p> <p>23% with other adults</p>	<p>Younger than other markets; just 27% are over 45</p> <p>36% couple</p> <p>25% family (more than twice the number of Germans who travel with family)</p> <p>19% with other adults</p>
<p>99% air</p> <p>46% hire a car</p>	<p>75% air</p> <p>25% by sea</p> <p>32% hire a car</p> <p>23% bring their car</p>	<p>80% air</p> <p>20% sea</p> <p>18% bring their car</p> <p>37% hire a car</p>
<p>75% are on first visit</p>	<p>65% are on first visit</p> <p>25% are repeat visitors</p>	<p>65% are on first visit</p>
<p>50% will return</p>	<p>54% will return</p>	<p>50% will return</p>
<p>N/A</p>	<p>Very important if attending consumer shows in Germany</p> <p>Many like to do their holiday research and planning in their own language, so knowledge of the language is a definite advantage</p>	<p>Being able to speak French is important both for consumer and trade engagement</p>

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A snapshot of the GB market



Size of the segments

- 4.8m Social Energisers
- 4.7m Culturally Curious
- 5.5m Great Escapers
- 100% of GB Social Energisers who have been to Ireland rate it 8 out of 10
- More than half of Culturally Curious visitors were happy with the value provided

Potential of the market for Ireland

- Ireland's largest source market; 2.9m visitors in 2013, an increase of 5.6% over 2012
- 42% of all our overseas visitors are from GB
- 36% of all our overseas holidaymakers are from GB
- 64% of GB outbound market are interested in visiting Ireland in the future

Top 10 destinations for GB traveller

1. Spain
2. France
3. US
4. Greece
5. Italy
6. Portugal
7. Turkey
8. Netherlands
9. Ireland
10. Belgium

A snapshot of the US market



Size of the segments

- 12.9m Culturally Curious
- 36.7m Great Escapers
- 26.4m Social Energisers

Size and potential of the market for Ireland

- Our second most important market; it grew by 14.5% in 2013 to 1.036m visitors
- US visitors are our highest spenders and our most affluent visitors
- They stay longer and travel around more

A snapshot of the German market



Size of the segments

- 16.6m Great Escapers
- 7.6m Culturally Curious
- 7.6m Social Energisers

Size and potential of the market for Ireland

- The world's second largest outbound travel market (after China); 53% take a holiday abroad
- Ireland gets 1% of German outbound market
- Ireland's 3rd largest source market; 483,000 visitors in 2013, up 7.7% over 2012
- Activity is important for many; 28% take part in hiking/walking and Germany is the largest market for overseas anglers, which accounts for 15% of all overseas angling visits
- 68% of outbound market have expressed an interest in visiting Ireland in the future

A snapshot of the French market



Size of the segments

- 8.3m Great Escapers
- 6.7m Culturally Curious
- 6.4m Social Energisers

Size and potential of the market for Ireland

- Ireland's 4th largest source market; 434,000 visitors in 2013, up by 9.4% on 2012
- 60% of outbound market expressed an interest in visiting Ireland in the future
- French people take an average 4 holidays per year, 1.5 of these are abroad holidays

France is the world's 5th most important outbound market by revenue; 24.6m outbound trips, with € 29 billion spend