



# THE GB MARKET

London – April 2012



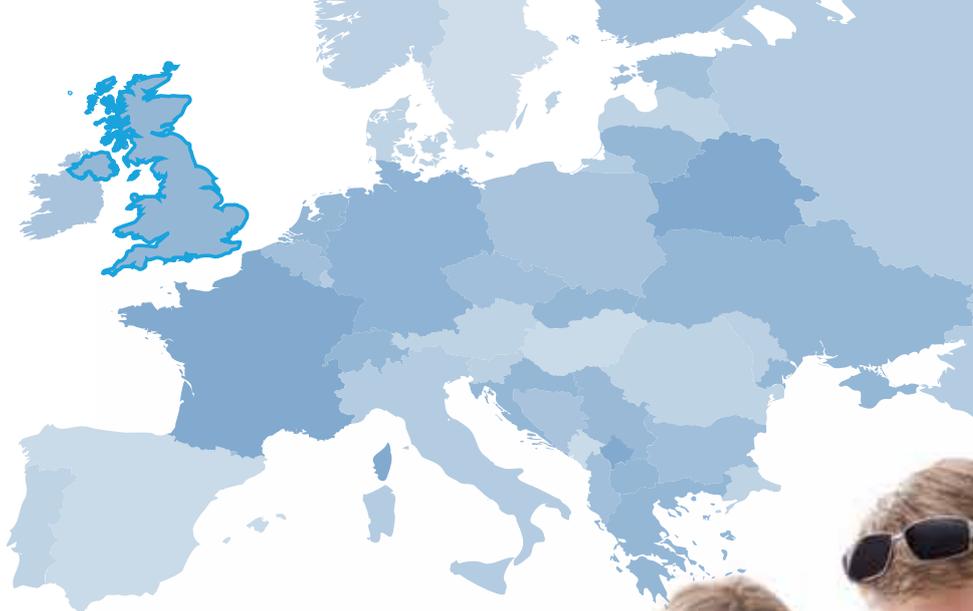
Continuing to reinvigorate the Great Britain market, our most important for visitors to the island of Ireland, will be the main the focus for Tourism Ireland in 2012. Following the decline in numbers of visitors from GB to Ireland since the economic downturn began, 2011 saw the beginning of a return to growth, with an overall increase of 5.1%. This is a very welcome first step, and whilst we undoubtedly have a challenging time ahead, seeing our cautious optimism turn into reality is encouraging.

Our aim in 2012 is to continue to build on this trend by increasing visitor numbers by 5.5%. Our other priorities for 2012 will be to grow total promotable visitors by 6% and to increase the number of Tourism Ireland opportunities for the industry and trade by 15%.

To achieve these aims Tourism Ireland will be reinvigorating the appeal of the Ireland brand, highlighting those unique aspects which make the island of Ireland such an engaging destination in order to differentiate our offering in what is a very competitive market. We will be helped by a recent strengthening of sterling and by continued improvement of the perception of value in this market, which has been a major challenge for us.

Tourism Ireland launched a new communications campaign in January focusing on the compelling idea of 'joyful immersion', aimed at differentiating Ireland as a holiday destination from the GB and European markets. Launched in TV and cinema in early January, the campaign will continue to have a high TV profile throughout the year. Other channels used will include radio, outdoor and press partnerships

Among the strategies employed during this ongoing campaign we will be instigating positive word of mouth through our extensive online activities and promotions. We will also be running extensive PR and online consumer campaigns to tie in with the Olympics this summer. Additionally, there will be significant investment in our Loyalty programme, lead Generation and PR campaigns during 2012 to boost business tourism.



During the course of the year we will be inviting up to 300 travel and lifestyle writers from leading UK print and broadcast media outlets to visit the island of Ireland, to generate comprehensive coverage on their return home.

Tourism Ireland will also be investing in numerous co-operative promotional campaigns with air and sea carriers and tour operators to deliver the vital message to their consumers about the great value that awaits visitors to the island of Ireland.

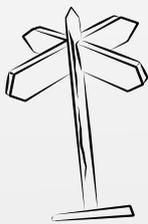
With this vigorous, exciting and targeted marketing campaign running throughout the year we are confident that Tourism Ireland can build on the improved perceptions of value and differentiation offered to visitors to the island of Ireland and significantly increase our market share.

”

*Vanessa Markey*

Head of Great Britain

## Why should I target the GB market?



- Large market of 60 million people.
- It's our largest source market.
- Strong cultural and ancestral links.
- Good air access to lots of different airports around the island of Ireland. Good ferry access too.
- We speak the same language, so no translation costs for brochures or website. Also, your staff can fully engage with people when they're here.
- It's on our doorstep so it's not expensive to travel there for sales calls.
- Easy to promote your product online as 85% use the internet, the highest among Ireland's top 4 overseas markets. Also, 26.6 million adults have a Facebook account.
- 64% of the GB outbound holiday market are interested in visiting the island of Ireland in the future.
- On the list of places they're interested in visiting, the island of Ireland ranks 9th.



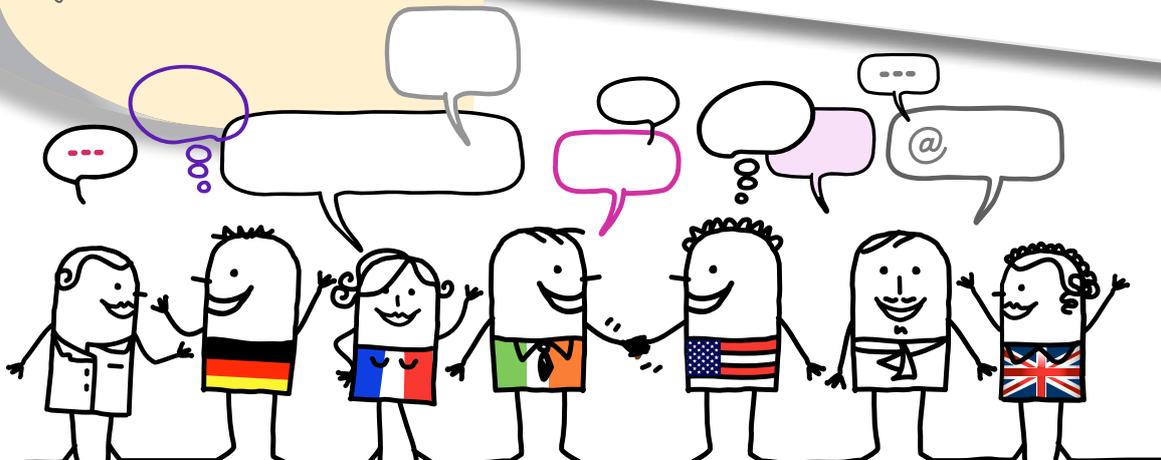
## Interesting facts about the GB travel market:

- 45-64 year olds with no dependent children represent one in four people and one in three trips abroad.
- Someone turns 50 every 40 seconds in the UK.
- The south east is the most populous region and also the region from which Ireland gets most of its holiday visits.
- The minimum statutory holiday entitlement is 28 days annually.
- Travel and tourism products constitute around 50% of all online purchases in the UK.
- More money is spent on online advertising in the UK than on television advertising, radio advertising or print advertising.
- Surfing the internet is more popular than watching television.
- By mid 2012, more people will own smartphones than ordinary mobile phones.
- 30% of mobile owners have used their smartphone to browse for holidays or travel tickets, whilst another 11% have completed a travel purchase from their device.
- When asked to name destinations which offer similar holidays to Ireland, 48% said Scotland, 29% said Wales and 7% said England.

Good Afternoon

### Questions to ask yourself:

- What do these facts about the GB market tell me about who I'm targeting?
- How can I use them to help me increase my GB business?
- Look at Ireland through the eyes of the GB holidaymaker - does your product match what they are looking for?





## What are the prospects for the GB market?

Overall consumer confidence is beginning to show signs of recovery, although it is still a very difficult environment. Consumer confidence grew from its low level of -33.5% in Dec 2011 to -28% in Jan 2012. Predictions for the next 12 months continue to rise. Although as we have seen in GB, consumer confidence has been very unstable and low. Predictions for outbound travel from GB were also reversed downwards. However, Sterling has strengthened against the Euro and perceptions of value have improved.

However, Ireland is still perceived as an expensive destination especially the cost of smaller items such as food and drink. Accommodation and 'things to do' can offer exceptional value for money so we have two challenges; 1. To communicate that message and 2. For the Irish Industry to deliver good value on those smaller items that stick in someone's mind as being expensive. If, collectively, we can communicate and deliver value for money as well as the authentic, memorable, friendly welcome that we are renowned for, we will continue to recapture the important GB holiday market. Word of mouth will spread quickly - both in person and online and GB business to Ireland will continue to grow in 2012.

### The UK is the world's 4th largest outbound travel market after Germany, the US and China.

#### Popular destinations are:

- |           |                      |
|-----------|----------------------|
| 1. Spain  | 5. Greece            |
| 2. France | 6. Portugal          |
| 3. USA    | 7. Turkey            |
| 4. Italy  | 8. Island of Ireland |

#### The importance of exchange rates

The recent drop in value of the euro against sterling combined with the better value now available on the ground means that the cost of a holiday in many parts of the island is more attractive for GB visitors than it has been for some time.



In a GB survey, when people were asked what springs to mind about Ireland, there was a strong association with Dublin. For tourism businesses outside Dublin, where there might be less awareness or a vagueness about the geography, places of interest, activities available etc, it's important to show the variety of things to do in your local area. The clever use of maps which suggest lots of interesting things to do in your local area rather than just a text description can be effective on your website / promotional material etc.

Although there is no need to translate text for your website, you should still consider internationalisation of your website for currency, imagery, search engine optimisation etc. Research has shown that the cost of living and euro pricing can create a significant stumbling block for GB holidaymakers at the point of booking their holiday to Ireland, so bear these points in mind when tailoring your website to your potential GB customers.





## The GB Market to Ireland

### Size and value of the GB market

- Great Britain is the most important source market for the island of Ireland, accounting for over half of all visitors and almost 40% of holidaymakers.
- Visitor numbers grew by over 5% in 2011 and Tourism Ireland is targeting further growth of 5.5% in 2012.
- It accounts for over a third of all tourism revenue.
- It accounts for one third of all accommodation bednights.
- Over 1 million British holidaymakers come here each year.
- They spend the highest proportion of their budget on food and drink.
- A quarter of our GB holidaymakers are from the highest AB social class with a further 50% in 'white collar' professions.

### Where do they go?

The most popular regions for visiting are Dublin (53%), the south west (28%), the west (19%), and the south east (11%).

- Dublin and the south west each account for just under one third of all British holidaymaker bednights, followed by the west at 15% and the southeast at 10%.

### How do they get here?

- Four of every five who visit arrive here by air.
- 1 in 5 British holidaymakers bring their own car, another 1 in 5 hire one here, leaving 3 in 5 not using a car.
- Ease of access is rated as a particular advantage of holidaying here. This is seen as a particular advantage for 'empty nesters', for whom ease of travel is important (avoiding hassles in airports etc.).

### How long do they stay?

The trend for shorter stays continues, with 7 out of 10 GB holidaymakers staying 5 nights or less. Overall, the average stay is 5 nights. Longer holidays are more likely in the June – August period.

### What age are they?

While GB holidaymakers tend to be older, with almost two thirds aged 35+, there is a trend toward a younger profile in recent years. The majority of the 35-54 year olds travel as a couple.

### Is it their first visit?

Almost three out of every five (59%) British holidaymakers are repeat visitors to Ireland, the highest of all of our source markets. Ireland has become more dependent on repeat visitors with the share and number of first time visitors and holidaymakers in marked decline in recent years. Tourism Ireland's promotional campaigns will seek to address this trend.

### What do they do when they're here?

- Least likely market to engage in an activity (reflecting in part the high level of city breaks).
- The market most likely to just come to relax and get away from things, they also have the greatest up-take on using spa facilities when here.
- 56% of British holidaymakers engage in historical / cultural activities while here, compared to nearly 90% of German and US holidaymakers and four out of five French holidaymakers.
- 'Connections with locals' is often cited as a key feature of a good holiday for GB holidaymakers. Markets (local markets, farmers markets etc) are seen as a familiar yet stimulating context for meeting the locals.
- Hotels account for just under one third of GB holidaymaker bednights, followed by staying with friends/relatives (at 20%, this is the highest from the 4 main markets), rented accommodation (18%) and guesthouses/B&Bs (12%).



## How do they rate their holiday here?

- 75% say that their pre-trip holiday expectations were matched and 25% say they were exceeded. For those whose holiday expectations were exceeded, the main reasons were the Irish people, the scenery and the fact that the weather was better than expected! These three reasons were common for the 4 main markets.
- When asked on a scale of 0-10 if they'd recommend Ireland as a holiday destination, 58% give a score of 9 or 10, where 10 was 'definitely recommend'. These people are likely to be strong advocates of holidays in Ireland.
- Over three quarters of GB holidaymakers say that they will definitely visit Ireland again over the next few years. This is higher than for our other main overseas markets.

## Value for money

56% of GB holidaymakers say they get good 'all round value for money' from their holiday in Ireland. This is a higher rating than for France (49%) or Germany (48%) but lower than the US (61%).

In recent years the price of accommodation in Ireland is perceived as offering real value for money but there is criticism of other elements (€5 pint; €15 sausage & chips; entry to attractions).

In terms of image in the overseas markets this presents a challenge to the Irish tourism industry – to offer value and to communicate that value in all promotional offers.



Note: Statistics are drawn from a number of sources including the Fáilte Ireland 2011 Visitor Attitudes Survey, Fáilte Ireland Tourism Facts 2010 (Preliminary) and Fáilte Ireland Preliminary Estimates for 2011. Keep up to date with the latest tourism statistics on [www.failteireland.ie](http://www.failteireland.ie) and [www.tourismireland.com](http://www.tourismireland.com). If you're interested in data for Northern Ireland, please see [www.tourismireland.com](http://www.tourismireland.com)

## The 5 most popular regions for GB visitors to Ireland are:

South east	21%
London	15%
South west	11%
North west	11%
West midlands	10%

## When do they visit?

Ireland is a year round holiday destination for GB holidaymakers, offering the best seasonal distribution with 48% arriving in the off season (October to April)

Jan – Apr	29%
May – Jun	17%
Jul – Aug	25%
September	11%
Oct – Dec	19%

## Ireland's top 5 advantages for GB holidaymakers

Irish people	41%
Culture / history	36%
Access/easy to get to	34%
The scenery	32%
Drink/pubs	23%

## Ireland's top 5 disadvantages for GB holidaymakers

Cost of living	42%
Weather	31%
Drink costs	29%
Food costs	24%
High cost i.e. souvenirs/shopping	16%



# TRAVELLING TO IRELAND BY AIR

## AIRLINE CONTACT DETAILS

AIRLINE	TELEPHONE	WEBSITE
Aer Lingus	0871 718 5000	<a href="http://www.aerlingus.com">www.aerlingus.com</a>
British Airways	0844 493 0787	<a href="http://www.britishairways.com">www.britishairways.com</a>
CityJet	0871 666 5050	<a href="http://www.cityjet.com">www.cityjet.com</a>
easyJet	0843 104 5000	<a href="http://www.easyjet.com">www.easyjet.com</a>
Flybe	0871 700 2000	<a href="http://www.flybe.com">www.flybe.com</a>
Jet2.com	0871 226 1737	<a href="http://www.jet2.com">www.jet2.com</a>
Loganair	0871 700 2000	<a href="http://www.loganair.co.uk">www.loganair.co.uk</a>
Manx2	0871 200 0440	<a href="http://www.manx2.com">www.manx2.com</a>
Ryanair	0871 246 0000	<a href="http://www.ryanair.com">www.ryanair.com</a>





# AIR ROUTES



DEPART	ARRIVE	AIRLINE
Aberdeen	Dublin	Aer Lingus Regional
	George Best Belfast City Airport	Flybe
Birmingham	Belfast International	easyJet
	City of Derry	Ryanair
	Cork	Aer Lingus
	Dublin	Aer Lingus, Ryanair
	George Best Belfast City Airport	Flybe
	Ireland West Airport Knock	Aer Lingus Regional
	Shannon	Aer Lingus
Blackpool	Waterford	Flybe
	Belfast International	Jet2.com
Bournemouth	Dublin	Aer Lingus Regional
	Dublin	Aer Lingus Regional
Bristol	Belfast International	easyJet
	Cork	Aer Lingus Regional
	Dublin	Aer Lingus Regional, Ryanair
	Ireland West Airport Knock	Ryanair
	Shannon	Aer Lingus Regional
Cardiff	Dublin	Aer Lingus Regional
	George Best Belfast City Airport	Flybe
Dundee	George Best Belfast City Airport	Flybe, Loganair
East Midlands Nottingham	Dublin	Ryanair
	Dublin	Ryanair
	Ireland West Airport Knock	Ryanair
Edinburgh	Belfast International	easyJet
	Cork	Aer Lingus Regional
	Dublin	Aer Lingus Regional, Ryanair
	George Best Belfast City Airport	Flybe
	Ireland West Airport Knock	Flybe
	Shannon	Aer Lingus Regional
Exeter	Dublin	Flybe
	George Best Belfast City Airport	Flybe
Glasgow International	Belfast International	easyJet
	Cork	Aer Lingus Regional
	Dublin	Aer Lingus Regional
	Donegal	Flybe
	George Best Belfast City Airport	Flybe
Glasgow Prestwick	City of Derry	Ryanair
	Dublin	Ryanair
Inverness	George Best Belfast City Airport	Flybe
Isle of Man	Dublin	Aer Lingus Regional
	George Best Belfast City Airport	Manx2
Jersey	Belfast International	Jet2.com
	Cork	Aer Lingus
	Dublin	Aer Lingus
	George Best Belfast City Airport	Flybe
Leeds Bradford	Belfast International	Jet2.com
	Dublin	Ryanair
	George Best Belfast City Airport	Flybe
	Ireland West Airport Knock	Flybe

DEPART	ARRIVE	AIRLINE
Liverpool	Belfast International	easyJet
	City of Derry	Ryanair
	Cork	Ryanair
	Dublin	Ryanair
	Ireland West Airport Knock	Ryanair
	Shannon	Ryanair
London City	Dublin	CityJet
London Gatwick	Belfast International	easyJet
	Cork	Aer Lingus, Ryanair
	Dublin	Aer Lingus, Ryanair
	George Best Belfast City Airport	Flybe
	Ireland West Airport Knock	Aer Lingus
London Heathrow	Shannon	Ryanair
	Belfast International	Aer Lingus
	Cork	Aer Lingus
	Dublin	Aer Lingus, British Airways
	George Best Belfast City Airport	British Airways
London Luton	Shannon	Aer Lingus
	Belfast International	easyJet
	Dublin	Ryanair
	Ireland West Airport Knock	Ryanair
	Kerry	Ryanair
London Southend	Waterford	Aer Lingus Regional
	Belfast International	easyJet
	Dublin	Aer Lingus Regional
London Stansted	Waterford	Aer Lingus Regional
	Belfast International	easyJet
	City of Derry	Ryanair
	Cork	Ryanair
	Dublin	Ryanair
	Ireland West Airport Knock	Ryanair
Manchester	Kerry	Ryanair
	Shannon	Ryanair
	Belfast International	easyJet
	Cork	Aer Lingus
	Dublin	Aer Lingus, Ryanair
	George Best Belfast City Airport	Flybe
Newcastle	Shannon	Aer Lingus
	Waterford	Aer Lingus Regional
	Ireland West Airport Knock	Flybe
	Belfast International	easyJet
Newquay	Cork	Jet2.com
	Dublin	Ryanair
	George Best Belfast City Airport	Flybe
	George Best Belfast City Airport	Flybe
Southampton	Dublin	Flybe
	George Best Belfast City Airport	Flybe



# TRAVELLING TO IRELAND BY SEA

## SEA ROUTES

DEPART	ARRIVE	CARRIER
Cairnryan	Larne	P&O Ferries
	Belfast	Stena Line
Fishguard	Rosslare	Stena Line
Holyhead	Dublin	Irish Ferries
		Stena Line
	Dun Laoghaire	Stena Line
Isle of Man	Belfast	Steam Packet Company
	Dublin	Steam Packet Company
Liverpool	Dublin	P&O Ferries
Liverpool (Birkenhead)	Belfast	Stena Line
Pembroke	Rosslare	Irish Ferries
Troon*	Larne	P&O Ferries

\*Mar-Oct.

## FERRY AND COACH OPERATORS CONTACT DETAILS

FERRY COMPANY	TELEPHONE	WEBSITE
Irish Ferries	0871 730 0400	<a href="http://www.irishferries.com">www.irishferries.com</a>
P&O Ferries	0871 664 5645	<a href="http://www.poferries.com">www.poferries.com</a>
Steam Packet Company	0872 299 2992	<a href="http://www.steam-packet.com">www.steam-packet.com</a>
Stena Line	0844 770 7070	<a href="http://www.stenaline.co.uk">www.stenaline.co.uk</a>
Eurolines Coach & Ferry	0871 781 8181	<a href="http://www.eurolines.co.uk">www.eurolines.co.uk</a>



All information is correct at time of going to press but may be subject to future operator changes. Calls to Sea/Coach operators may incur local or national call charges. Please see websites for details.



## Why is access so important?

- As an island, people can't drive here, so air and ferry access are critical.
- With people taking shorter breaks, easy access into the regions is important for a regional spread of tourism.
- For those in the pre-family life stage, the availability of discounted flights can determine the choice of holiday destination.
- At time of writing (March 2012), there were 1,727 flights every week from GB to the island of Ireland.
- Reflecting the growth in short breaks, the trend has been towards increasing use of air access, now 78%. 22% of GB holidaymakers travel here by ferry (down from 38% in 2004).
- Between 1999 and 2009 the percentage of GB holidaymakers who brought their car with them fell from 32% to 20% while the proportion who hired a car here increased from 11% to 16%. Over the same period the proportion who did not use a car rose from 54% to 65%.
- There is a growth in urban based holidays with less regional touring.

## What should I do now?

- Check out the flight schedules for your nearest airport(s) to establish opportunities for you and partners in your area to promote in the source market.
- Check out the ferry schedules for your nearest ferry port.
- Create links on your website to your nearest airport(s) and ferry port.
- Remember to tell your customers the journey times to your premises from different airports or ferry ports e.g. 2 hours from Dublin Airport, 20 minutes from Shannon Airport, 1 hour from Rosslare Port etc.
- If it's easy to get to your property by train, remember to provide information on train services to your customers.
- Research in GB has shown that many potential holidaymakers think it might be difficult to travel from place to place in Ireland. This highlights the importance of showing your potential customers how easy it is both to (a) get to Ireland and (b) travel around when they're here. Give details of airports, ferry service, motorways, rail services etc.
- Look at Ireland through the eyes of the GB holidaymaker and show them that travelling to Ireland is as convenient or more convenient than a staycation in GB.

Note: flight schedules can change frequently. For the most up to date listing, see <http://www.discoverireland.com/gb/ireland-plan-your-visit/getting-there>

## How do I know if my product will appeal to the GB holidaymaker?

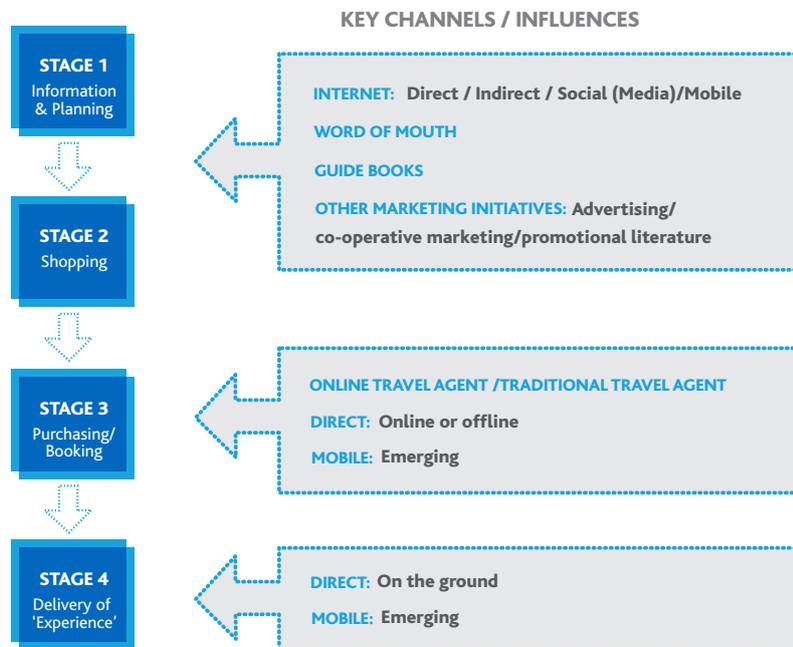
**Before you embark on selling your product overseas, it's important to understand the match or fit between it and the demands of the GB holidaymaker.**

**In broad terms, there is potential for every product in every market but ask yourself these questions to help determine which markets offer the best potential for your product and those in your local area;**

- How good is access from the market to your product / your region?
- Is your product readily accessible to potential customers in the appropriate distribution channel (e.g. your relationships with tour operators, the quality of your website etc.)?
- How does this market perform for you at present / do you have an established track record in servicing it?
- Can you capitalise on or respond to the trends / growth patterns / opportunities in the market?
- There is widespread belief that the current demand for shorter breaks, city breaks, event tourism, activity and adventure holidays, and culturally motivated trips is likely to gain popularity over the next five to ten years.

# How do British Holidaymakers Plan and Purchase their Holiday?

From first deciding where to go on holiday through to experiencing it at the chosen destination, there are 4 key stages:



At the information and planning stages, which can take weeks, people are likely to visit a variety of websites including:

- General search query websites such as Google.
- Destination marketing websites such as DiscoverIreland.com.
- Online Travel Agent (OTA) sites such as Expedia.
- Travel community sites such as TripAdvisor.
- Metasearch sites such as kayak.co.uk and travelsupermarket.com which search multiple individual search engines/websites to make product and price comparisons.
- Links within social media sites such as Facebook and Twitter.



## How do GB holidaymakers arrange their holiday to the island of Ireland?

- GB holidaymakers to the island of Ireland are very independent, with less than 10% coming here on a package or inclusive holiday where an inclusive price for fares to/from Ireland and at least one other element, such as accommodation, car hire, etc. was paid fully or partly in advance.
- They are the least likely market to visit a tourist information office when they're here.
- The most popular place to look for holiday information is the internet, followed by recommendations from friends/relatives/business associates. Guidebooks on Ireland are not as important for GB holidaymakers as they are for US, German or French holidaymakers. Around 10% consult a travel agent/tour operator.
- Almost 90% of GB holidaymakers purchase some element of their trip online with air or sea tickets the most common purchase followed by accommodation.



## Who does Tourism Ireland target in the GB market?

Two important segments for Tourism Ireland in the GB market are:

1. Sightseers & Culture Seekers
2. Scenic Relaxers

**A Sightseer & Culture Seeker (S&CS) is someone for whom “exploring a country’s sights and finding out about its culture” is the key motivator for going on holiday.**



Charles (51) and Penny (47) are full time professionals from Oxford, looking forward to early retirement. They have one child at university and another on a gap year in South America. They live in a comfortable stone house in Oxfordshire with a small garden where they love to relax in summer. They enjoy bridge, gardening, visiting the theatre with friends and eating out. They take the odd city break each year and a main holiday in the summer.

### GB Sightseers and Culture Seekers

**Who they are:** Living outside urban/metropolitan Britain.

**Needs:** Visiting interesting historical landmarks in addition to museums and art galleries and they like mixing with locals.

**Holiday Types:** Take one long holiday and they bring their own car or fly and hire a car. They also take several city breaks. Travel throughout the island of Ireland and most likely to visit Dublin, the North, South and West.

**Reaching them:** Avid viewers of BBC and Channel 4. Are likely readers of The Times, Telegraph & Guardian. Use brochures, travel agents and increasingly the internet.

### The British Sightseer and Culture Seeker (S&CS)...in Great Britain

**How many in GB?**

6.5 million.

**Heart of segment.**

Exploration, engagement and authentic new experiences.

**Who is the GB S&CS?**

ABC1 (56% AB), tend to be married, older 50+ Concentrated in London, the North West and the South West. Take many short breaks.

**What matters on holiday?**

Beautiful scenery, and having lots to see and do are key considerations for S&CS, value for money and safety and security are important to the older S&Cs. While on holidays in general this group like to visit natural attractions and to experience local food, drink and cuisine. Exploring small towns and villages and visiting historic houses, castles and gardens is also important. Getting under the skin of a destination is really important to this group.

**Perceptions of Island of Ireland**

The island is perceived as beautiful and welcoming and easily accessible for S&CS. High interest in visiting but they need convincing on how different an island of Ireland holiday is from a GB domestic holiday, and on the value for money that is on offer on the island.



## The British Sightseer and Culture Seeker (S&CS)...in Great Britain

	Short City Breakers	Longer Rural Holidays
Visitation	In recent years short city breaks have become very important to this group.	The longer rural holiday has lost some popularity to the city break in recent years.
Holiday behaviour	Tend to stay 1-3 nights with about a fifth extending to up to 5 nights. The city break is more appealing to the younger female S&CS and 50% are single and most do not have kids. They tend to stay in Dublin and over a third are here on a repeat visit. They tend to travel in couples or with a group of adults and visit year round. Hotels (mainly 3 star) most popular with this group.	This group tend to travel in the summer months and stay between 5 and 8 nights. The majority visit the West and the South West. They are older than the average S&CS to the island and two thirds are here on a repeat visit. They tend to be married and travel in a couple or with their family. They are highly likely to use a car on their trip. Hotels, guesthouses and rented all popular with this group.
How do I reach them?	As the island is so well known to GB holidaymakers a high proportion use the internet for choosing, planning and booking their holiday. Word of mouth is also key as almost everyone knows someone who has been to Ireland.	

## The Scenic Relaxer - A Scenic Relaxer (SR) is someone for whom "relaxing & getting away from it all" is the key motivator for going on holiday

### How many in GB?

4.5 million.

### Heart of segment.

Busy people who want an easy escape from everyday life.

### Who is the GB SRS?

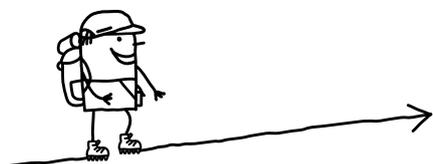
ABC1 C2 (higher proportion in the C1 category than SRS), even gender split, even age split with a higher proportion at the 30-50 age group. Concentrated in London, the North West and the South West.

### What matters on holiday?

Relaxing and getting away from it all for an easy and stress free experience are key holiday motivators as well as spending quality time with family or a partner. Value for money and safety & security are also key to this group.

### Perceptions of Island of Ireland

Ireland is perceived as beautiful and welcoming, and also, importantly, easy to get to at a reasonable price. Interest in the island is high but they need more convincing on some of the physical aspects of the island as a holiday destination (lots to see and do, uniqueness, value for money).





## The Scenic Relaxer - A Scenic Relaxer (SR)

	Short City Breakers	Longer Rural Holidays
Visitation	City Breaks very appealing to this group.	The longer rural holiday offering is more appealing to this group than to the S&CS.
Holiday behaviour	Majority stay 1-3 nights and while Dublin is the most popular destination they are more inclined to take a city break in a different destination, a very high proportion on a repeat visit and the city breakers tend to be under 55. There is a strong female bias and majority are married - just a quarter have dependent children. Hotels (mainly 3 star) are popular with this group.	More concentrated in the summer months and stay longer than the S&CS. South West and the West are the most popular regions. This group are loyal and 8 in 10 are here on a repeat visit. 3 out of 4 are 45+ and the majority are married with a significant proportion having dependent kids. They travel mainly in a couple or with their family. 8 in 10 will also use a car and the majority will base themselves in one region outside Dublin. Rented accommodation suits the needs of this group well.
How do I reach them?	As the island is so well known to GB holidaymakers a high proportion use the Internet for choosing, planning and booking their holiday. Word of mouth is also key as almost everyone knows someone who has been to Ireland.	

### The most popular Ireland guidebooks in GB are:

1. Ireland AA Key Guide
2. Eyewitness Travel Guide: Ireland
3. Frommer's Ireland
4. Insight Guide – Ireland
5. Lonely Planet

**TIP**

If the GB market is important for you, you should buy copies of these popular guide books to see if you are listed or featured. If the guidebooks are not stocked in your local book shop, they are available for purchase online. If you are listed, then keep in touch with the editor / publisher if you have news on any product developments, new services you offer GB visitors etc. If you're not listed but you feel you have an interesting product that really appeals to GB holidaymakers, then contact the editor / publisher to provide information for possible inclusion in the guide when they are next updating it. Also invite the editor or researcher to visit you when they are in Ireland doing research for their next edition.



## Tip

Before you contact a GB tour operator to see if they are interested in working with you, you must do your research; Do they feature similar products to what you offer? Do they feature your area or region?

Talk to Tourism Ireland in GB – they can help you with information such as who the main decision makers in the company are, how important Ireland is within their total product portfolio, how Ireland has been performing within that portfolio, the kind of products or services they are looking for, new market entrants etc.

You can save yourself a lot of legwork and costly mistakes by channelling your plans through Tourism Ireland in the market office first.

By doing your research first, you won't waste your time or the tour operator's time.

## Remember!

If you are sending the tour operator an email there is every chance that they are receiving 100s more from the Irish trade, so do your research first and make sure you tailor your approach to suit their needs. Read '10 Steps to Working Successfully with Overseas Tour Operators' to get maximum benefit.

## GB TOUR OPERATOR PROGRAMMES TO IRELAND

Company	Telephone	Website
Alba Travel & Events	01334 656 548	www.alba-travel.co.uk
Andrew's of Tideswell Ltd	01298 871222	www.andrews-of-tideswell.co.uk
Anglers/ Martin's World Holidays	01246 221717	www.anglersworld.tv www.irelandbreaks.co.uk
Bakers Dolphin	01934 415000	www.bakersdolphin.com
Barrhead Travel Ltd	08712 262 673	www.barrheadtravel.co.uk
Best of Scotland Holidays	01592 752 990	www.best-of-scotland.co.uk
Booking.com	0845 0805 012	www.booking.com
Bowens Holidays	08453 303 747	www.bowensholidays.com
Brightwater Holidays	01334 657 155	www.brightwaterholidays.com
Caledonian Travel	08448 153 001	www.caledoniantravel.com
CIE Tours	00 353 1 703 1888	www.cietours.com
Cresta Holidays	0844 8798 036	www.crestaholidays.co.uk
Crusader Holidays	01255 425 453	www.crusader-holidays.co.uk
Daley Irish Tours	01738 560435	www.daleyirishtours.com
David Palmer Coaches	01924 895 849	www.davidpalmercoaches.co.uk
David Urquhart Travel	08448 717 717	www.davidurquharttravel.co.uk
Days Away	01592 753 009	www.daysaway.co.uk
Dodds of Troon Ltd	01292 288100	www.doddssoftroon.com
Driveline Golf	08703301056	www.drivelinegolf.com
Easy Breaks	08430 554433	www.easy-breaks.com
Ebookers	020 3320 3320	www.ebookers.com
Edwards Coach Holidays	01443 202 048	www.edwardscoaches.co.uk
Executive Golf & Leisure	01786 832244	www.execgolf-leisure.com
Expedia	0203 3024 8211	www.expedia.co.uk
Glenton Holidays	08000 242 424	www.glentonholidays.co.uk
Golf Par Excellence	01737 21 18 18	www.golfparexcellence.com
Golf Ireland	01382 522 500	www.golfireland.com
Golfbreaks.com	0800 29779880	www.golfbreaks.com
Grand UK Holidays	01603 619933	www.grandukholidays.com
Great Rail Journeys	01904 521 936	www.greatrail.com
Harrison Holidays	01553 774634	www.harrisonholidays.co.uk
Harry Shaw Travel	024 7645 5544	www.harryshaw.co.uk
Hostelbookers.com		www.hostelbookers.com
Hotel Connexions	01786 825407	www.hotelconnexions.com
Hotel Direct	0800 633 8000	www.hoteldirect.co.uk
Hotel Reservation Service (HRS)	00353 1 5245122	www.hrs.com
Hotels.com	00353 1 6569450	www.hotels.com
Hotels4u.com	0844 875 3455	www.hotels4u.com
Hostelworld		www.hostelworld.com

Accom only	Angling	Coach	Cruising	Culture/Heritage	Cycling	Equestrian	Gardens	Golf	Motoring	Self-Catering	Short Breaks	Spa	Walking	Watersports	Special Interest Tours	Whiskey Tours/ Clan Gatherings	Escorted Rail Holidays	Pilgrimages
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## GB TOUR OPERATOR PROGRAMMES TO IRELAND

Company	Telephone	Website
In the Saddle	01299 272997	<a href="http://www.inthesaddle.com">www.inthesaddle.com</a>
Irish Ferries Holidays	08717 300 400	<a href="http://www.irishferries.com">www.irishferries.com</a>
Kings Angling and Activity Holidays	01708 453 043	<a href="http://www.kingsanglingholidays.co.uk">www.kingsanglingholidays.co.uk</a>
Kirker Holidays	0207 5931893	<a href="http://www.kirkerholidays.com">www.kirkerholidays.com</a>
Lastminute.com	0818 300 064	<a href="http://www.lastminute.com">www.lastminute.com</a>
Leger Holidays	08445 046 251	<a href="http://www.leger.co.uk">www.leger.co.uk</a>
Leisure Link Golf Holidays	01708 339300	<a href="http://www.leisurelinkgolf.com">www.leisurelinkgolf.com</a>
Links Golf St Andrews	01334 478 639	<a href="http://www.linksgolfstandrews.com">www.linksgolfstandrews.com</a>
McKinlay Kidd Ltd	0844 804 0020	<a href="http://www.seeirelanddifferently.co.uk">www.seeirelanddifferently.co.uk</a>
National Holidays	0844 779 990	<a href="http://www.nationalholidays.com">www.nationalholidays.com</a>
North British Tours	01461 337 799	<a href="http://www.northbritishtours.com">www.northbritishtours.com</a>
On Course Travel	01372 451 910	<a href="http://www.ireland-oncourse.co.uk">www.ireland-oncourse.co.uk</a>
Opodo	0871 2770090	<a href="http://www.opodo.co.uk">www.opodo.co.uk</a>
PAB Coach Holidays	0845 8685896	<a href="http://www.pabtours.com">www.pabtours.com</a>
Parrys International Tours	01992 414579	<a href="http://www.parrys.info">www.parrys.info</a>
Rabbie's Trail Burners Ltd	01312 263 133	<a href="http://www.rabbies.com">www.rabbies.com</a>
Shearings Holidays	0844 824 6351	<a href="http://www.shearings.com/ireland">www.shearings.com/ireland</a>
Skills Holidays	0845 6665544	<a href="http://www.skillsholidays.co.uk">www.skillsholidays.co.uk</a>
Stena Line Holidays	08445 768889	<a href="http://www.stenaline.co.uk">www.stenaline.co.uk</a>
Stewart Travel	01292 476 721	<a href="http://www.stewarttravel.co.uk">www.stewarttravel.co.uk</a>
Superbreak	0871 2213344	<a href="http://www.superbreak.com">www.superbreak.com</a>
Take the Family		<a href="http://www.takethefamily.com">www.takethefamily.com</a>
Tangney Tours	01732 886 666	<a href="http://www.tangney-tours.com">www.tangney-tours.com</a>
Tayleur Mayde Golf Tours	0131 524 9554	<a href="http://www.tayleurmayde.com">www.tayleurmayde.com</a>
The Camping & Caravanning Club	024 76422024	<a href="http://www.campingandcaravanningclub.co.uk">www.campingandcaravanningclub.co.uk</a>
The Caravan Club	01342 326 944	<a href="http://www.caravanclub.co.uk">www.caravanclub.co.uk</a>
Thomson Cities and Short Breaks	0871 231 4691	<a href="http://www.thomsoncities.co.uk">www.thomsoncities.co.uk</a>
Titan Travel Ltd	0800 988 5823	<a href="http://www.titantravel.co.uk">www.titantravel.co.uk</a>
Travelling the Fairways	01334 460 789	<a href="http://www.ttfgolf.com">www.ttfgolf.com</a>
Travelzoo		<a href="http://www.travelzoo.co.uk">www.travelzoo.co.uk</a>
Whytes Coaches Ltd	01651 862211	<a href="http://www.whytes.co.uk">www.whytes.co.uk</a>
Wilkinson Golf & Leisure	01383 629940	<a href="http://www.wilkinsongolf.com">www.wilkinsongolf.com</a>



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All information correct at time of going to press but may be subject to future operator changes. See [www.discoverireland.com/gb/ireland-plan-your-visit/tour-operators/](http://www.discoverireland.com/gb/ireland-plan-your-visit/tour-operators/). When phoning GB from Ireland, the code is: 00 + 44 + Area Code (drop the first 0) + Tel number.