

enjoyEngland ™

Ireland market profile  
updated January 2006



# IRELAND

## Market profile

Updated January 2006

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# 1) Market snapshot

## GENERAL MARKET CONDITIONS

- Population 4.0 million – growing
- IMF Forecasts 2006: GDP (based on PPP per capita) USD\$42,082 (making Ireland one of the world's five wealthiest per capita nations on this measure). GDP Growth Rate 4.9%. Unemployment 4%. Inflation 2.5%

## ACCESS OVERVIEW

- NO visa required
- Air Routes: to England from: Waterford, Cork, Kerry, Shannon, Galway, Knock, Donegal and Dublin
- Ferry Routes: to England: Dublin – Liverpool and Holyhead; Dun Laoghaire – Holyhead; Rosslare – Fishguard and Pembroke ; Cork – Swansea

## MARKET SIZING / MARKET SHARE

- 5.9 million outbound in 2004. England has 31.3% market share
- England ranked top outbound destination
- 1.85 million visits in 2004 (+5% on 2003)
- £548m spent in 2004 (+7% on 2003). AEV £296; AED £77

## MARKET SHAPE / MARKET DYNAMICS

- 46% VFR; 21% are HOLIDAY visitors
- 84% stay 1-7 nights
- 54% visit between July – December
- Top Towns = London, followed by Birmingham, Manchester

## PRODUCT / MARKET FIT

- History / Heritage / Culture, Shopping, Sports, Events

## DEMOGRAPHICS / POTENTIAL CONSUMER SEGMENTS

- All groups travel to England from Ireland
- Youth / DINKS / Families / Empty Nesters / Business

## REACHING THE IRISH CONSUMER

- Internet access 45.6%

# 2) General market conditions

## Population / languages

The US Census Bureau puts the population of Ireland at 4.0 million in 2004.

The population is forecast to grow to 4.4 million by 2014.

Languages: English and Irish (Official)

## Economics / politics

The Irish economy continues to post performances that are the envy of most other Eurozone countries, with GDP increasing at an annual rate in excess of 4%, unemployment well under 5% of the labour force and rising consumer confidence. However, a potential concern for the future, according to The Economist, is the increasing level of private indebtedness.

In 2004/5 Ireland was the fourth largest investor in the UK in terms of the number of jobs underpinned by foreign investment. The Foreign and Commonwealth Office believes that Irish investment plays a major role in 1,985 business units across the UK. Perhaps surprisingly England is not the largest inward investor in Ireland, this mantle is held by the USA.

## Holidays / annual leave

Irish employees receive an average of 20 days annual leave.

## General emerging consumer trends

Ireland is the rare example of a developed country with a growth record to match East Asia's, along with low unemployment and inflation, but how long can it last?

Higher inflation than in rival countries means that Ireland's competitiveness is being slowly eroded. If the Euro appreciates further against the currencies of Ireland's two biggest trading partners, America and Britain, Irish exports will be hurt.

Low interest rates in Ireland have caused a property boom, particularly in Dublin, in which average house prices have quadrupled over the past decade, with household debt expanding to match. As a member of the Euro it cannot raise interest rates to control any property boom.



## 3) Access overview

### Political situation

No political issues currently exist to restrict travel to England from Ireland.

### Passport and visa issues

Irish visitors do NOT require a visa to visit England.

### Gateways / access to England

In 2004, 84% of visitors from Ireland travelled to England by air and 14% travelled by sea. (IPS).

England is easily accessible by air from across Ireland with routes originating in Waterford, Cork, Kerry, Shannon, Galway, Knock, Donegal and Dublin.

Flight time is typically around 1 hour.

Ferries provide an alternative to flying for visitors wishing to access the West of England, or who wish to bring their own car with them. Routes from Dublin serve Liverpool and Holyhead, Dun Laoghaire also has regular services to Holyhead. Fishguard and Pembroke both have ferry sailings from Rosslare.

Crossing times vary from 1 hour 40 minutes on the shortest routes through to 10 hours on the longest routes.

## 4) Market sizing/share

### Current & forecast market size

Global Insight estimates that there were 5.9 million outbound overnight visits from Ireland in 2004.

There are forecast to be 7.6 million such trips by 2010, an increase of 29%.

England currently accounts for around 31.3% of outbound trips from Ireland.

|  | 2003                    | 2004      | Change year on year |
|--|-------------------------|-----------|---------------------|
| Total Visits                                       | 1,761,000               | 1,850,000 | +5%                 |
| Visits Rank (League Table No. Visitors to England) | 4                       | 4         | No change           |
| Total Spend  | £512m                   | £548m     | +7%                 |
| Spend Rank (League Table £ Spend in England)       | 4                       | 4         | No change           |
| Average Spend per Visit (AEV)                      | £291                    | £296      | +2%                 |
| AEV Rank   | Outside top 30 rankings |           |                     |
| Average Spend per Day (AED)                        | £68                     | £77       | +13%                |
| AED Rank   | 21                      | 7         | Up 14 places        |

Source: IPS

### Key competitor destinations – actual

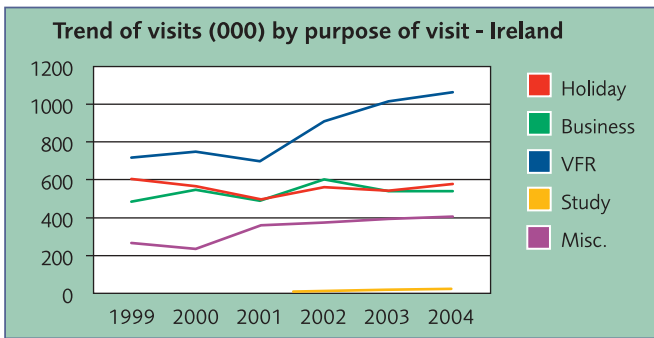
Although this does not separate out England, the Global Tourism Navigator shows us that UK was 1st in the actual ranking of top destinations (short and long haul included) for Irish outbound travel in 2004.

|   |        |    |             |
|---|--------|----|-------------|
| 1 | UK     | 6  | Portugal    |
| 2 | Spain  | 7  | Netherlands |
| 3 | France | 8  | Germany     |
| 4 | US     | 9  | Cyprus      |
| 5 | Italy  | 10 | Greece      |



# 5) Market shape/dynamics

## Purpose of visit

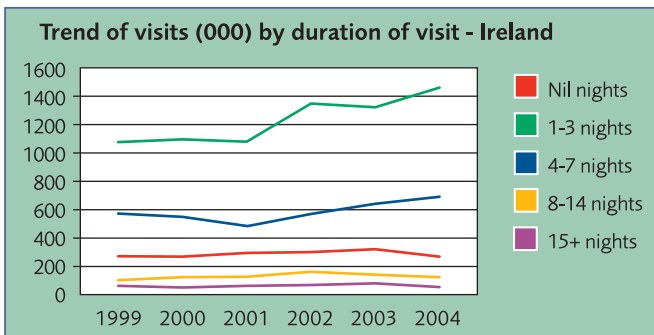


46% of the visitors from Ireland to England come to visit friends and relatives. This proportion has slowly risen in the last 6 years from 41% in 1999.

Visiting England for the purpose of a holiday stands at 21%, a proportion that has declined each year from 28% in 1999.

17% of Irish visitors come for business.

## Length of stay



94% of Irish visitors stay in England for less than 8 nights with 57% coming for a short break (1-3 nights).

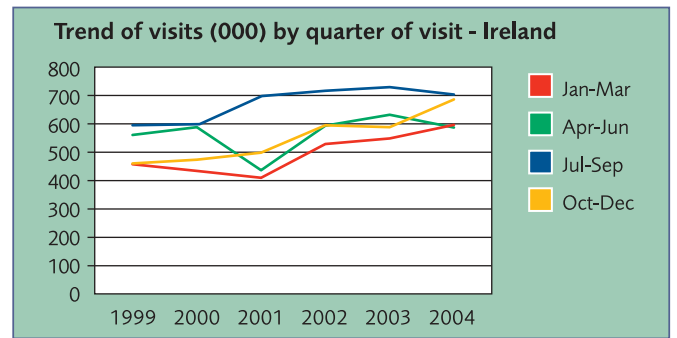
The same proportion of holiday visitors stay in England for 7 nights or less. The holiday short-break market accounts for 54% of holiday visits.

VFR visitors tend to stay for a similar length of time as the holidaymakers with only 11% staying longer than one week

## Regional spread / top towns

\* 37% of visitors from Ireland stayed in London, 13% the North West, 13% the West Midlands.

## Seasonal spread



Irish residents visiting England tend to visit in even levels across the year. There is a slightly higher proportion of visitors in the last half of the year with 54% visiting at this time.

Those visiting friends and relatives prefer to do so in the last two quarters (54%).

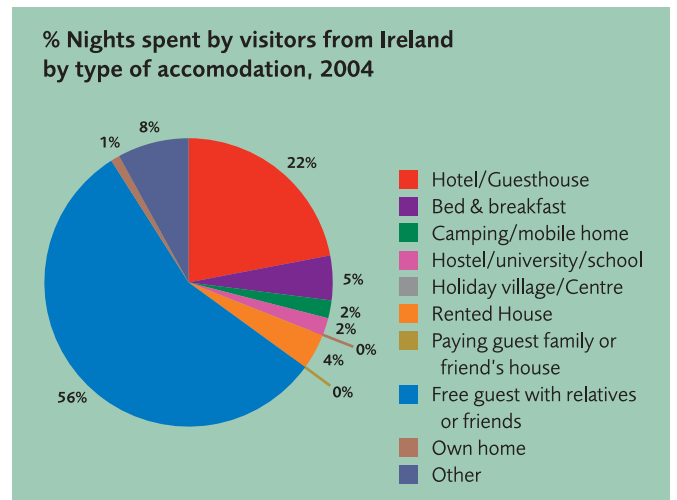
53% of holidaymakers prefer to visit England in the last half of the year.

## Accommodation type

46% of Irish resident visitors stay as a free guest at a family or friend's house when they visit England, which accounts for 56% of nights spent.

49% of holiday visitors stay in a hotel or guesthouse, while 29% stay with friends or family as a free guest.

72% of business visitors stay in a hotel or guesthouse.



## 6) England's brand image in Ireland

### England as a tourist destination - Discover, Fun and Indulgent

The main pillars of the England brand in the Irish market are Discover, Fun and Indulgent. The England brand model can be said to be describing 3 key Need states ('The 3 Pillars'):

- **Discover:** 'To absorb, learn and experience'.
- **Fun:** The need 'To Do', to be active and proactive, avoiding sitting around doing nothing, bonding with friends and family, letting off steam, etc.
- **Indulgent:** The need to 'Reward yourself' to counter act the stresses and strains of modern everyday life.

These elements of the brand are shown in the brand wheel below:

Recent focus groups showed that the Irish people's perception of England is linked to their experience of English people and a sense of historic connection. The English are to some degree perceived as more reserved and less welcoming than the Scots and Welsh, although the North/South divide within England was identified, with the North perceived as more friendly.

The English Rose logo used by Enjoy England was well received by the Irish. The rose was strongly associated with England through sport, e.g. the English Rugby team and the Rugby World Cup. There was also a sense of connectivity in using a rose, i.e. shamrock for Ireland and rose for England. The word 'Enjoy' from Enjoy England is associated with fun and choosing to visit England rather than being obliged to visit.



# 7) Product/market fit

## What products / experiences are most attractive to Irish visitors?

### History / Heritage / Culture

England performs strongly on being somewhere with lots of cultural events and attractions, plenty of stories surrounding the history and a good contrast of old and new.

### Shopping

The Irish appreciate the range of shopping outlets available in England.

### Sports

Sport is a key reason for the Irish to visit the England. Additional research carried out by IPS in 2001 showed that Ireland was the top market for visitors watching or playing sport as their main purpose of visit.

When it comes to spectator sports, Ireland leads the way with visits.

Cheltenham regularly receives over 20,000 visitors per annum with International Rugby matches yielding the same per match when Ireland is participating.

Wimbledon, golf tournaments and premiership football are all popular spectator sports for the Irish when visiting England.

### Events

Other events that Irish people would visit on a trip to the England are big shows and exhibitions such as the Chelsea Flower Show and West End theatre productions.

### London and the rest of England

For the Irish, England is a country of two very different parts – London and the rest of England. Their perceptions and associations as identified in recent focus groups are summarised as follows:

| London  | England  |
|---|--|
| <ul style="list-style-type: none"> <li>• Culture – theatre, museums, art galleries, shows</li> </ul>          | <ul style="list-style-type: none"> <li>• History – castles and cottages</li> </ul>   |
| <ul style="list-style-type: none"> <li>• Night life – clubs, pubs</li> </ul>                                  | <ul style="list-style-type: none"> <li>• TV – Coronation Street, Fawley Towers</li> </ul>  |
| <ul style="list-style-type: none"> <li>• Cultural diversity from imperial past</li> </ul>                     | <ul style="list-style-type: none"> <li>• Events – Sports e.g. Rugby</li> </ul>   |
| <ul style="list-style-type: none"> <li>• Shopping</li> </ul>  | <ul style="list-style-type: none"> <li>• Culturally Traditional – Royal Family, formality, extremes in social class, accents e.g. Liverpool and Cockney</li> </ul> |
| <ul style="list-style-type: none"> <li>• Architecture – London Eye, Gherkin, Big Ben, Tower Bridge</li> </ul> | <ul style="list-style-type: none"> <li>• Architecture</li> </ul>   |
| <ul style="list-style-type: none"> <li>• Food – culturally diverse, quality restaurants</li> </ul>            | <ul style="list-style-type: none"> <li>• University towns – Cambridge</li> </ul>   |
| <ul style="list-style-type: none"> <li>• Buzz – energy, excitement, loud, busy</li> </ul>                     | <ul style="list-style-type: none"> <li>• Historic towns – Bath</li> </ul>  |
| <ul style="list-style-type: none"> <li>• Attractions – Portobello</li> </ul>                                  | <ul style="list-style-type: none"> <li>• Food – afternoon tea or pub lunch</li> </ul>  |
|   | <ul style="list-style-type: none"> <li>• Activities – Alton Towers, Birmingham Arena</li> </ul>  |
|   | <ul style="list-style-type: none"> <li>• Countryside – Cotswolds, Lake District, Shakespeare country</li> </ul>  |
|   | <ul style="list-style-type: none"> <li>• Sports activities – surfing, walking</li> </ul>   |
| <p>Source: England Brand Communication Overseas, Qualitative Study May 2005, CRAM Research</p>                |  |

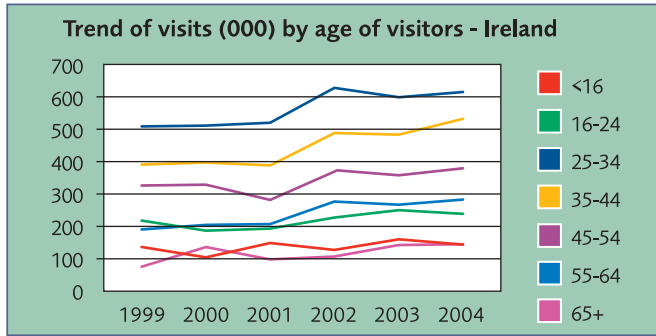
## Key strengths and weaknesses

The key strengths and weaknesses of England as perceived by the Irish are shown in the table below:

| Strengths   | Weaknesses  |
|---|---|
| <ul style="list-style-type: none"> <li>• Close geographically</li> </ul>                                  | <ul style="list-style-type: none"> <li>• Expensive</li> </ul>   |
| <ul style="list-style-type: none"> <li>• Safe choice</li> </ul>   | <ul style="list-style-type: none"> <li>• Boring – too similar to Ireland</li> </ul>                               |
| <ul style="list-style-type: none"> <li>• Accessible – getting there and transport system</li> </ul>       | <ul style="list-style-type: none"> <li>• Visiting family can mean staying indoors and not seeing sites</li> </ul> |
| <ul style="list-style-type: none"> <li>• Similar to Ireland – no barriers in language and food</li> </ul> |   |
| <ul style="list-style-type: none"> <li>• Visiting friends and family</li> </ul>                           |   |
| <ul style="list-style-type: none"> <li>• Shopping</li> </ul>  |   |

## 8) Who is the Irish visitor?

### Demographics



The largest proportion of Irish residents visiting England are aged between 25 and 44 (47%)

Overall, 52% of visitors are male and 42% are female.

| Travelling Group 2003    | % of Visits |
|--------------------------|-------------|
| Lone traveller           | 40          |
| As a couple/with partner | 16          |
| Group of friends         | 11          |
| Family group             | 23          |
| Business colleagues      | 7           |
| Tour group               | 3           |
| Other                    | 0           |
| Don't know               | 0           |

| Age Group | Male % | Female % |
|-----------|--------|----------|
| 0 - 15    | 6      | 7        |
| 16 - 24   | 9      | 11       |
| 25 - 34   | 24     | 29       |
| 35 - 44   | 25     | 20       |
| 45 - 54   | 17     | 15       |
| 55 - 64   | 12     | 12       |
| 65+       | 7      | 6        |

In terms of travelling group – 40% of the Irish resident visitors were lone travellers in 2003.

Visitors travelling as a family group were the second largest segment of group composition (23%).

### VB key market segments

All groups travel to England from Ireland, due to the ease and proximity. Enjoy England has conducted some specific research (England Brand Communications Overseas 2005) amongst the families, couples and empty nester Irish holiday segments examining their main motivations. The details are summarised below:

| Irish holiday maker segment                           | Characteristics of segments                                 | Key drivers of segment                     | Motivations for visiting England  |
|---|---|--|---|
| High Income Couples                                   | Social class B<br>25+ years old<br>No Children              | 'Reward yourself' and 'To feel and ' sense | Generally think of visiting London for culture, shopping and nightlife  |
| High Income Young Families                            | Social class B<br>Have children under the age of 16         | 'To do' and 'To feel and sense'            | Generally think of England as accessible by car so offers value for money, as well as being safe and easy for the children to make friends.                           |
| Middle Income Couples                                 | Social Class C1<br>25+ years old<br>No Children             | 'To do'                                    | Generally think of cheap flights, visiting friends and family and integrating with the local culture.   |
| Middle Income Empty Nesters (children have left home) | Social Class C1<br>Children have left home<br>50+ years old | 'To feel and sense'                        | Generally think of England as a 'safe option' – similar to home with no barriers e.g. language, food, travel also providing value for money and lots of sight seeing. |

### 1st Timers & repeat visitors

In 2004, 93% of visitors from Ireland had visited England previously within the last 10 years, placing Ireland at the top of the repeating visitors rank table (IPS).





## 9) Caring for the Irish consumer

### Information provision

The Irish visitor's geographic knowledge of England and products available can be limited. Many visitors have not travelled frequently to England and are perhaps only familiar with London from a weekend break spent in the city. Ensure that your material is descriptive and includes good maps showing the location of your establishment/attraction/destination in relation to the rest of England.

Customer care is particularly important. Staff should have a good knowledge of the local area including attractions, pubs, restaurants, etc.

### Accommodation

Irish visitors will expect a high standard of accommodation: en-suite rooms, tea/coffee-making facilities and a television.

The accommodation will also be expected to be licensed and have night porter facilities.

Irish visitors are very friendly and will expect to stay in a 'home from home' environment.

### Value for money

England is sometimes perceived as an expensive destination as there is a lack of understanding between sterling and the Euro exchange rates.

Even though statistically the exchange rate is considerably better than pre-Euro currency levels there still appears to be an opinion of the expense of England as a holiday destination.

Value for money messages are essential for the Irish and they appreciate it when you can accept Euro currency or show the price in both Euro and sterling to enable easy price comparison.

## 10) Reaching Irish consumers

### Deciding, planning & booking patterns

The budget air carriers in Ireland have brought about a revolution in booking trends. Ryanair has led the way, but other low fares airlines such as Aer Lingus, Flybe and bmibaby have continued the trend. Many travel agents have reported that they have lost the "England" visitors to the airline websites.

Tour Operators have reported a haemorrhaging in bookings to English cities, however, Irish people continue to travel at increasing levels. Many people are now booking their own flights through airline websites and then availing of additional services on the sites to book car hire and accommodation.

Ferry Operators are also continuing to report stronger direct sales for crossings.

The only up turn in travel agency business are holiday park bookings with companies like Haven and British Holidays often booked through Irish Ferries and Stena Line.

### Online environment

45.6% of the population are online.

The Irish are a confident market for internet booking and are happy to book their travel and accommodation directly.

### Media habits

#### Ireland-media overview

There are four national commercial television channels - RTE1, Network 2, TV3, TNAG (Irish language); a small local television presence; four national radio stations - RTE1, 2FM, Today FM, Lyric FM; and an extensive local commercial radio network.

The majority of people in the Dublin area and many households throughout the country have access to Cable TV. The basic package provided by Cable includes BBC, UTV, C4, Sky One, Sky News, Discovery, E4 and MTV.

Ireland has one of the highest consumptions of newspapers in Europe. In 2004 readership among adults was at 58.2% for daily papers and at 78.9% for Sunday papers, in comparison readership in the UK was at 48.7% and 53.9% respectively for the same period. The ability for newspaper articles to genuinely influence choice of travel destination for the consumer is therefore very high.

There are 11 national newspapers, Sunday editions, a small number of Irish editions of English newspapers, and numerous free distribution newspapers, magazines and weekly regional newspapers.

There are several specialist weekly magazines including the *RTE Guide* (equivalent to the **Radio Times**) and a range of fortnightly and monthly lifestyle publications. Many English newspapers and magazines are also available.





## Working with Enjoy England

Taking part in the Enjoy England marketing campaigns is the ideal way to make your marketing budget work harder. Combining detailed knowledge of proven routes to market, with innovative promotional channels and a fresh campaign look and feel, ensures that your brand obtains maximum cut-through in today's crowded market-place.

Different campaign participation levels are available depending on preferred promotional channels and budget available. The packaged opportunities below are designed to offer you maximum exposure for your money, but there is some room for flexibility, according to your needs. Please enquire for further information.

### shortbreakEngland

Highlighting the excellent accessibility to England from Ireland, England's Short Breaks campaigns will showcase the diversity and value for money of England as a short break destination. Focusing on England's dynamic towns and cities, with their blend of the historical and the modern, and the stunning countryside just a stone's throw from England's city centres, the campaigns will use a strong tactical message to encourage consumers to take a short break in England.

### Spring 2006 campaign (May - July 2006)

The spring shortbreakEngland campaign will slant towards targeting the families market, focusing on accessibility, freedom of having a car and the choice of activities and attractions on offer.

#### Level 1: £5000

| Activity           | Details   |
|--------------------|---|
| Website            | <ul style="list-style-type: none"> <li>• Presence on website</li> <li>• Online competitions</li> </ul>  |
| Online advertising | <ul style="list-style-type: none"> <li>• Search Engine Marketing</li> <li>• Generic campaign advertising on key travel and lifestyle websites e.g. yahoo.ie, eircom.net, ticketmaster.ie, irishjobs.ie, pigsback.ie.</li> <li>• Promotion of campaign website on VisitBritain.com/ie</li> <li>• Campaign e-viral</li> </ul> |
| E-direct mail      | <ul style="list-style-type: none"> <li>• Presence in e-DM to England database</li> <li>• Inclusion on an E-direct mail to 30,000 contacts on the VisitBritain Ireland database plus the England e-database</li> </ul>   |
| Press & PR         | <ul style="list-style-type: none"> <li>• Presence in generic press &amp; PR work for the campaign</li> </ul>  |
| Brochure racking   | <ul style="list-style-type: none"> <li>• At Dublin Holiday World and in the VB contact centre</li> </ul>  |

#### Level 2: £10,000

| Activity            | Details   |
|---------------------|---|
| Website             | <ul style="list-style-type: none"> <li>• Enhanced presence on website</li> <li>• Online competitions</li> </ul>   |
| Online advertising  | <ul style="list-style-type: none"> <li>• Search Engine Marketing</li> <li>• Generic campaign advertising on key travel and lifestyle websites e.g. yahoo.ie, eircom.net, ticketmaster.ie, irishjobs.ie, pigsback.ie.</li> <li>• Promotion of campaign website on VisitBritain.com/ie</li> <li>• Campaign e-viral</li> </ul> |
| E-direct mail       | <ul style="list-style-type: none"> <li>• Presence in e-DM to England database</li> <li>• Inclusion on E-direct mail to 30,000 contacts on the VisitBritain Ireland database plus the England e-database</li> </ul>  |
| Press & PR          | <ul style="list-style-type: none"> <li>• Presence in generic press &amp; PR work for the campaign</li> </ul>  |
| Offline advertising | <ul style="list-style-type: none"> <li>• Inclusion in dedicated media supplement to appear in key publications</li> </ul>   |
| Brochure racking    | <ul style="list-style-type: none"> <li>• At Dublin Holiday World and in the VB contact centre</li> </ul>  |

### Level 3: £20,000

| Activity            | Details   |
|---------------------|---|
| Website             | <ul style="list-style-type: none"> <li>• Maximum presence on website</li> <li>• Online competitions</li> </ul>  |
| Online advertising  | <ul style="list-style-type: none"> <li>• Search Engine Marketing</li> <li>• Generic campaign advertising on key travel and lifestyle websites e.g. yahoo.ie, eircom.net, ticketmaster.ie, irishjobs.ie, pigsback.ie.</li> <li>• Promotion of campaign website on VisitBritain.com/ie</li> <li>• Campaign e-viral</li> <li>• Partner branded online advertising</li> </ul> |
| E-direct mail       | <ul style="list-style-type: none"> <li>• Presence in e-DM to England database</li> <li>• Inclusion on an E-direct mail to 30,000 contacts on the VisitBritain Ireland database plus the England e-database</li> <li>• Inclusion on e-newsletter to external database</li> <li>• Inclusion on e-shot to England database in Ireland</li> </ul>                             |
| Press & PR          | <ul style="list-style-type: none"> <li>• Presence in generic press &amp; PR work for the campaign</li> <li>• Inclusion in campaign press trip, subject to newsworthiness</li> </ul>   |
| Offline advertising | <ul style="list-style-type: none"> <li>• Inclusion in dedicated media supplement to appear in key publications</li> <li>• Inclusion in Inserts (sample media could include <i>Irish Times</i>, <i>Irish independent</i>, <i>RTE Guide</i>)</li> <li>• Inclusion in radio advertising creative</li> </ul>  |
| Direct mail         | <ul style="list-style-type: none"> <li>• Presence in direct mail to 35,000 contacts on the VisitBritain Ireland database</li> </ul>   |
| Brochure racking    | <ul style="list-style-type: none"> <li>• At Dublin Holiday World and in the VB contact centre</li> </ul>  |

### Autumn 2007 campaign (Sept - Dec 2006)

The autumn shortbreakEngland campaign will be targeted towards DINKS, SINKS and empty nesters, with a slant towards city break product, accessible by air.

### Level 1: £5000

| Activity             | Details   |
|----------------------|---|
| Website              | <ul style="list-style-type: none"> <li>• Presence on website</li> <li>• Online competitions</li> </ul>  |
| Online advertising   | <ul style="list-style-type: none"> <li>• Search Engine Marketing</li> <li>• Generic campaign advertising on key travel and lifestyle websites e.g. yahoo.ie, eircom.net, ticketmaster.ie, irishjobs.ie, pigsback.ie.</li> <li>• Promotion of campaign website on VisitBritain.com/ie</li> <li>• Campaign e-viral</li> </ul> |
| E-direct mail        | <ul style="list-style-type: none"> <li>• Presence in e-DM to England database</li> <li>• Inclusion on an E-direct mail to 30,000 contacts on the VisitBritain Ireland database plus the England e-database</li> </ul>   |
| Brochure advertising | <ul style="list-style-type: none"> <li>• Quarter page advert in short breaks brochure</li> </ul>  |
| Press & PR           | <ul style="list-style-type: none"> <li>• Presence in generic press &amp; PR work for the campaign</li> </ul>  |
| Brochure racking     | <ul style="list-style-type: none"> <li>• At Dublin Holiday World and in the VB contact centre</li> </ul>  |

**Level 2: £10,000**

| Activity             | Details   |
|----------------------|---|
| Website              | <ul style="list-style-type: none"> <li>Enhanced presence on website</li> <li>Online competitions</li> </ul>   |
| Online advertising   | <ul style="list-style-type: none"> <li>Search Engine Marketing</li> <li>Generic campaign advertising on key travel and lifestyle websites e.g. yahoo.ie, eircom.net, ticketmaster.ie, irishjobs.ie, pigsback.ie.</li> <li>Promotion of campaign website on VisitBritain.com/ie</li> <li>Campaign e-viral</li> </ul> |
| E-direct mail        | <ul style="list-style-type: none"> <li>Presence in e-DM to England database</li> <li>Inclusion on an E-direct mail to 30,000 contacts on the VisitBritain Ireland database plus the England e-database</li> </ul>   |
| Brochure advertising | <ul style="list-style-type: none"> <li>Half page advert in short breaks brochure</li> </ul>   |
| Press & PR           | <ul style="list-style-type: none"> <li>Presence in generic press &amp; PR work for the campaign</li> </ul>  |
| Offline advertising  | <ul style="list-style-type: none"> <li>Inclusion in dedicated media supplement to appear in key publications</li> </ul>   |
| Brochure racking     | <ul style="list-style-type: none"> <li>At Dublin Holiday World and in the VB contact centre</li> </ul>  |

**Level 3: £20,000**

| Activity             | Details   |
|----------------------|---|
| Website              | <ul style="list-style-type: none"> <li>Maximum presence on website</li> <li>Online competitions</li> </ul>  |
| Online advertising   | <ul style="list-style-type: none"> <li>Search Engine Marketing</li> <li>Generic campaign advertising on key travel and lifestyle websites e.g. yahoo.ie, eircom.net, ticketmaster.ie, irishjobs.ie, pigsback.ie.</li> <li>Promotion of campaign website on VisitBritain.com/ie</li> <li>Campaign e-viral</li> <li>Partner branded online advertising</li> </ul> |
| E-direct mail        | <ul style="list-style-type: none"> <li>Presence in e-DM to England database</li> <li>Inclusion on an E-direct mail to 30,000 contacts on the VisitBritain Ireland database plus the England e-database</li> <li>Inclusion on e-newsletter to external database</li> <li>Inclusion on e-shot to England database in Ireland</li> </ul>                           |
| Brochure advertising | <ul style="list-style-type: none"> <li>Full page advert in short breaks brochure</li> </ul>   |
| Press & PR           | <ul style="list-style-type: none"> <li>Presence in generic press &amp; PR work for the campaign</li> <li>Inclusion in campaign press trip, subject to newsworthiness</li> </ul>   |
| Offline advertising  | <ul style="list-style-type: none"> <li>Inclusion in dedicated media supplement to appear in key publications</li> <li>Inclusion in Inserts (sample media could include <i>Irish Times</i>, <i>Irish independent</i>, <i>RTE Guide</i>)</li> <li>Inclusion in radio advertising creative</li> </ul>  |
| Direct mail          | <ul style="list-style-type: none"> <li>Presence in direct mail to 35,000 contacts on the VisitBritain Ireland database</li> </ul>   |
| Brochure racking     | <ul style="list-style-type: none"> <li>At Dublin Holiday World and in the VB contact centre</li> </ul>  |

**Additional opportunities**

In addition to the Enjoy England consumer campaigns, a number of other marketing activities are available through VisitBritain (e.g. brochure distribution, presence at consumer exhibitions). Please contact VisitBritain for further details.

# 11) The trade

## Overview of trade structure

The travel trade is going through a revolution as a result of how people book their travel needs. More and more people are booking their travel online. Indeed many travel agents have lost their England business to the Internet especially to airline websites. City break tour operators have reported that England sales are down considerably.

- **Tour operators:** The traditional division between travel agency and tour operator is not distinct in Ireland. Tour operators are under increasing pressure as Aer Lingus is following Ryanair's lead in pulling out of any fare deals they may have had with the trade and directing all traffic to their own website.
- **Ferry operators:** Stena Line, Irish ferries and Swansea Cork Ferries sell England product. The ferry companies have come under increasing pressure from low cost carriers but tend to focus on holiday parks, shopping breaks (by car) and packages to England's major theme parks.
- **Online:** ebookers are the largest online holiday provider in Ireland. They are being joined by Lastminute.com, which has a wealth of excellent England product.
- **Travel agencies** usually sell products produced by tour or coach operators. Some travel agencies, however, tailor make their own packages for clients. Many travel agents in Ireland are small and independently owned, this however is changing. The main multiples are First Choice Travel Shops and Budget Travel, they tend to focus on selling their own sun packages. Other Travel Agent alliances include Worldchoice. Many travel agents are members of the Irish Travel Agent's Association (ITAA), the Irish equivalent of ABTA.

## Tour operators

Irish tour operators are becoming increasingly fragmented. Many are coming to terms with the new reality of selling holidays with no full service national carrier. It is likely this year will see many operators and agents will fold. More people are booking online; this is having obvious repercussions. The only operators, which seem to have a secure future at present, are those offering specialised niche services such as sport packages.

At present, there are 40 tour operators that package all-inclusive holidays to England. The majority of these are Irish owned independent businesses however this also includes the main air, sea and coach carriers who can sell packages.

## Travel agencies

Within Ireland, there are 365 agencies that are members of the Irish Travel Agents Association (equivalent of Association of British Travel Agents) and approximately 130 that operate outside the Association. The majority of agencies are family-owned and operated. There is a growing trend towards the development of retail chains and franchises such as Worldchoice. The advance in technology within travel agencies has been moving at a fairly rapid pace. However, it is only recently that travel agent and tour operator Internet sites have begun to emerge. A number of the larger travel agents do package products independently of the operators. This is common in business to Britain as many agents are aware of the product available and will approach the product directly.



## Key carriers for the market

### Ferry companies:

|                        |
|------------------------|
| Stena Line             |
| P&O Irish Sea          |
| Swansea Cork Ferries   |
| Norse Merchant Ferries |
| Irish Ferries          |

### Airlines

The fierce price war between Aer Lingus and Ryanair continues to drive prices down in the airline industry. Indeed Aer Lingus is in the process of becoming a fully-fledged low fares airline. Other low fares airlines in the market are bmibaby, Flybe and Thomsonfly. New air routes are opening up all the time between Ireland and England, although Dublin has routes to virtually every airport in England, more routes are opening up from Ireland's secondary airports, notably Knock, Shannon, Galway and Cork. With the ferry companies also locked in a price war, outbound travel prices for all forms of transport remain low.

The main carriers from Ireland to the UK are as follows:

|                 |
|-----------------|
| Ryanair         |
| Aer Lingus      |
| bmi             |
| bmibaby         |
| Flybe           |
| Aer Arann       |
| Air Southwest   |
| Thomsonfly      |
| British Airways |

## Reaching the travel trade

### Timing

Like many countries, Monday mornings and Friday afternoons are not the best times for business and Bank Holidays should be avoided. If you keep to the normal business hours, you can be assured of a warm welcome.

Banking hours are 1000-1600 with some opening on a Saturday morning.

### Public holidays

There are nine public holidays in Ireland each year. Good Friday is not a public holiday. The list of public holidays in Ireland each year is as follows:

| Fixed Public Holidays in Ireland |                                   |
|----------------------------------|-----------------------------------|
| 1 January                        | New Year's Day                    |
| 17 March                         | St. Patrick's Day                 |
|                                  | Easter Monday                     |
|                                  | First Monday in May, June, August |
|                                  | Last Monday in October            |
| 25 December                      | Christmas Day                     |
| 26 December                      | St. Stephen's Day                 |

### Transport

Some of the city centre agencies in Dublin are not interested in handling business to England, as they regard it as low value and difficult to book. It is therefore useful to have a hire car to visit agencies in the Dublin suburbs, County Dublin and the rest of Ireland.

Trains link most major Irish cities and towns and on occasions it is sometimes work looking at domestic flights with Aer Arann as the road network is not always as sophisticated in the regions, as it is the greater Dublin area.

Aer Arann operates flights from Dublin to Cork, Galway, Kerry, Knock, Sligo and Donegal. Aer Lingus flies between Shannon and Dublin.

### Etiquette

Pre-arranging appointments is not essential, but is appreciated. A call on the day to confirm the appointment is always a good idea, as business tends to be flexible.

There is little formality in travel agencies. People immediately use first name terms in their business dealings. The Irish are also keen negotiators and will react well to special offers, discounts or additional benefits for their clients.

As in most marketing, personal contact is greatly appreciated, and in Ireland it is seen as evidence that a company is taking the market seriously and acknowledging that it is distinct from the UK market.

Please remember that referring to England or Britain as "the mainland" is deeply offensive to Irish people. When referring to the Republic of Ireland simply use the word Ireland and not Eire (unless you speak Irish fluently!). Northern Ireland is referred to as "the North". When talking about Northern Ireland's second city use the word Derry and never Londonderry.

If you can price in Euro it helps enormously, this will help you not only in Ireland, but 300 million other consumers. It also means people can easily identify value, as the perception of any price in £ sterling is that it is expensive.

Ireland has changed to the metric system and although people are aware of imperial measurements Ireland has embraced the change over far more quickly than the UK. Please be aware of distances in Kilometres and metres for brochures and print. All road signs in Ireland are now in km.



## 12) Business visits/events

During 2004, 17% of travel from Ireland to England was for business purposes, and this accounted for 24% of spend (IPS).

| Business visitors Ireland        | Visits 2004 (000) | % Business Visits | Spend 2004 (£m)   | % Business Spend |
|----------------------------------|-------------------|-------------------|-------------------|------------------|
| Trade Fair / Exhibition          | 25                | 4.6               | 12                | 6.6              |
| Conference / Large Meeting       | 65                | 12.2              | 22                | 12.2             |
| Other Business                   | 447               | 83.3              | 146               | 81.2             |
| <b>Business visitors Ireland</b> |                   |                   |                   |                  |
|                                  | <b>AEV (£)</b>    | <b>AED (£)</b>    | <b>ALS (days)</b> |                  |
| Trade Fair / Exhibition          | 486               | 297               | 1.6               |                  |
| Conference / Large Meeting       | 335               | 196               | 1.7               |                  |
| Other Business                   | 327               | 158               | 2.1               |                  |
| <i>Source: IPS</i>               |                   |                   |                   |                  |

Irish business visits are made up of 17% visits to conferences, large meetings, trade fairs or exhibitions and 83% individual business travel.

### Meet England – business visits & events opportunities

#### Hospitality England campaign - Winter 2006

Sponsorship packages **from £1000**

Dedicated campaign to promote the wide range of sporting and non-sporting hospitality activities geared towards the corporate and incentive markets.

Suitable for Venues & Attractions offering corporate hospitality packages, Corporate Hospitality Agencies, Ticket Agents, Hotel Groups (offering bespoke packages).

#### English country conferences - Sprint 2007

Sponsorship packages **from £1000**

Business Meetings, Conferences and Incentives at countryside venues are the theme of this campaign, which will include Country House Hotels, Conference Centres and Stately Homes.

#### Meet the buyer event, Dublin, 27 September 2007

Sharing the Meet England stand.  
Maximum 3 companies (1 rep. per stand) **£300 per company**

Suitable for pan-England suppliers, including Hotel Groups, Unique Venues & DMCs.



# 13) Enjoy England in Ireland

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## Further information

Irish Travel Agents Association - [www.itaa.ie](http://www.itaa.ie)

Central Statistics Office in Ireland -  
[www.cso.ie](http://www.cso.ie)

For any further information relating to the Irish market, please contact the London-based International Markets Team (see above), or visit VisitBritain's dedicated website for the UK tourism industry: [www.tourismtrade.org.uk/englanddomesticalandinternational/](http://www.tourismtrade.org.uk/englanddomesticalandinternational/)

VisitBritain publishes a quarterly round-up of its research and intelligence called Visitor's Voice. To receive it, subscribe to the UK Industry eNewsletter at [www.visitbritain.com/ukindustry](http://www.visitbritain.com/ukindustry).

To find out more about VisitBritain's research visit [www.visitbritain.com/research](http://www.visitbritain.com/research).

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## Information sources used to compile this report

- International Passenger Survey figures (IPS) 2004 (Office for National Statistics)

*NB: Data from International Passenger Survey has been made available by the Office for National Statistics and has been used by permission. The ONS do not bear any responsibility for the analysis or interpretation of the data reported here.*

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