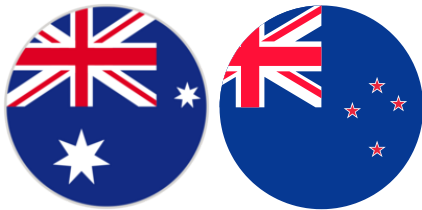


AUSTRALIA & NEW ZEALAND



MARKET PROFILE 2025

INBOUND TOURISTS

In 2025, the island of Ireland welcomed 156,000 tourists from Australia & New Zealand, who spent €214/£186 million and stayed 2.2 million nights. Australia & New Zealand (ANZ) were the island's seventh-largest overseas market by spend, the eighth-largest by nights and the ninth-largest by tourist numbers.



€214/£186m
revenue

#7
global rank



156k
trips

#9
global rank



2.2m
nights

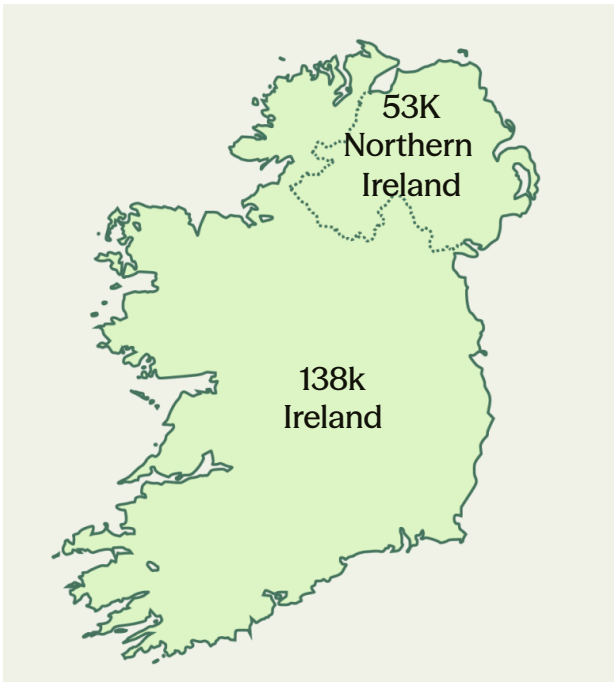
#8
global rank

WHERE DID OUR TOURISTS COME FROM?

Around 19,000 (12%) of the 156,000 tourists from ANZ were from New Zealand. Two-thirds (64%) of the 136,000 Australian tourists lived in New South Wales (38%) and Victoria (26%).

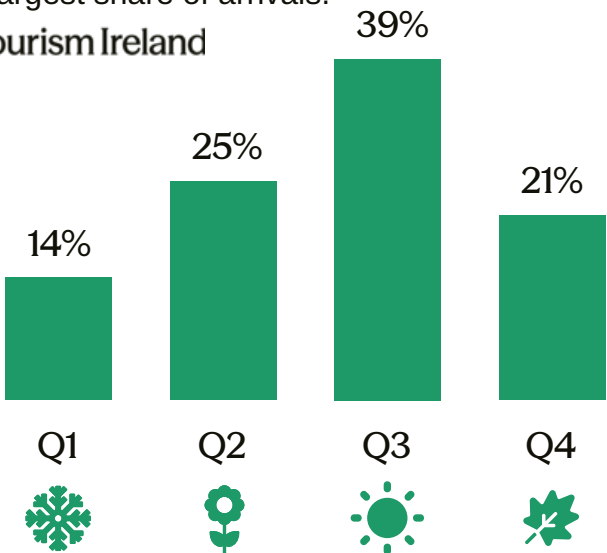
New South Wales	Victoria	Queensland	Western Australia	South Australia	Other
38%	26%	13%	10%	8%	6%

WHERE DID OUR TOURISTS VISIT?



WHEN DID OUR TOURISTS VISIT?

Tourists from Australia and New Zealand are most likely to visit the island of Ireland during the warmer months, with Q3 attracting the largest share of arrivals.



INBOUND TOURISTS

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Holidaymakers account for almost half of all revenue at 48%, while those visiting friends and relatives, despite being more numerous, contribute a further two-fifths at 41%.

		REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
	HOLIDAY	€103/£90m	48%	72k	46%	702k	32%
	VFR	€88/£77m	41%	76k	49%	1.2m	57%
	BUSINESS	€9/£8m	4%	5k	3%	78k	4%
	OTHER	€13/£11m	6%	8k	5%	154k	7%

HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?

In 2025, ANZ tourists stayed an average of 13.9 nights on the island of Ireland and spent €1,374/£1,195 per trip, equivalent to €99/£86 per night.



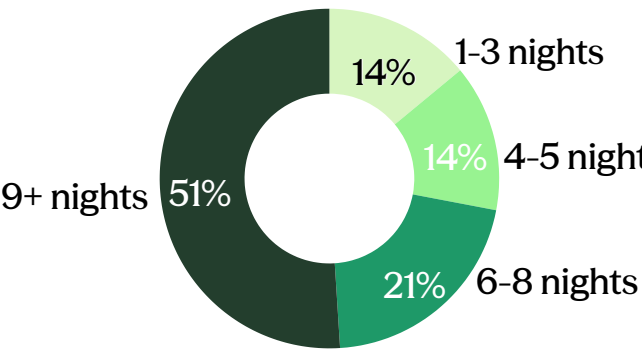
HOW DID OUR TOURISTS SPEND THEIR MONEY?

Food and drink accounted for the largest share of ANZ tourist spend, at 38%, ahead of accommodation and all other trip costs.

Food & drink	Accomm.	Shopping
		
38%	30%	13%
Transport	Entertainment	Misc.
		
9%	9%	1%

HOW LONG DID OUR TOURISTS STAY?

The majority (72%) stayed six or more nights on the island of Ireland.



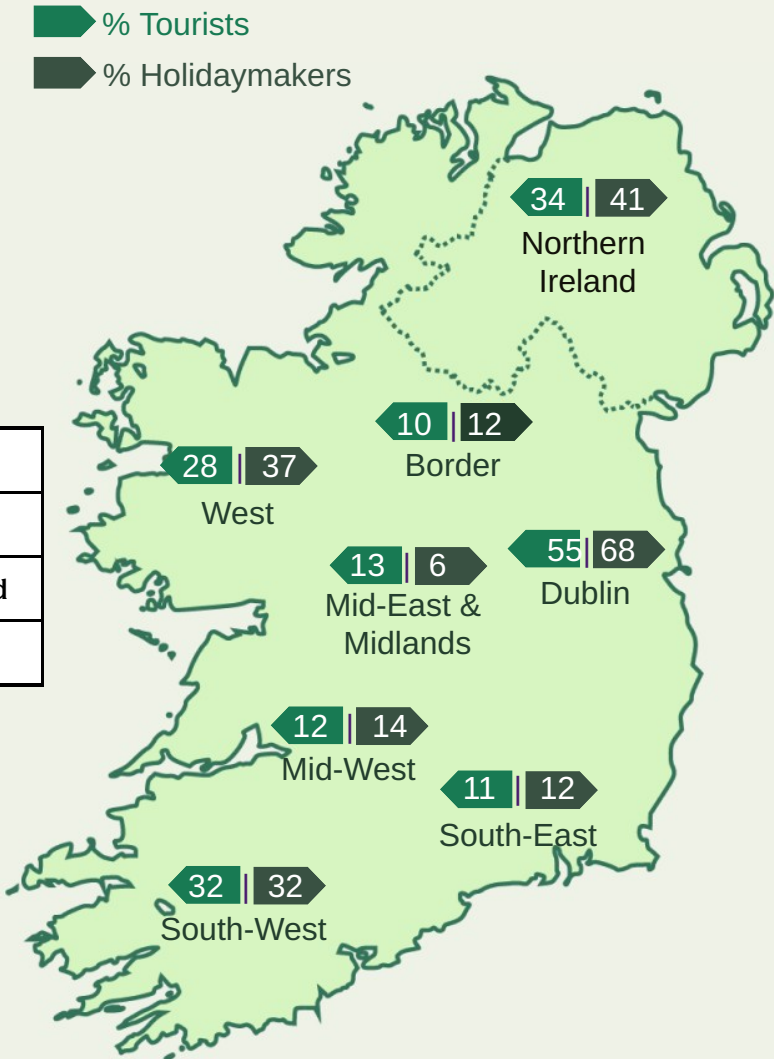
INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin, Northern Ireland, the South-West and the West are the most favoured destinations among ANZ tourists/holidaymakers.

Almost 36,000 ANZ tourists and 20,000 holidaymakers overnigheted on both sides of the border.

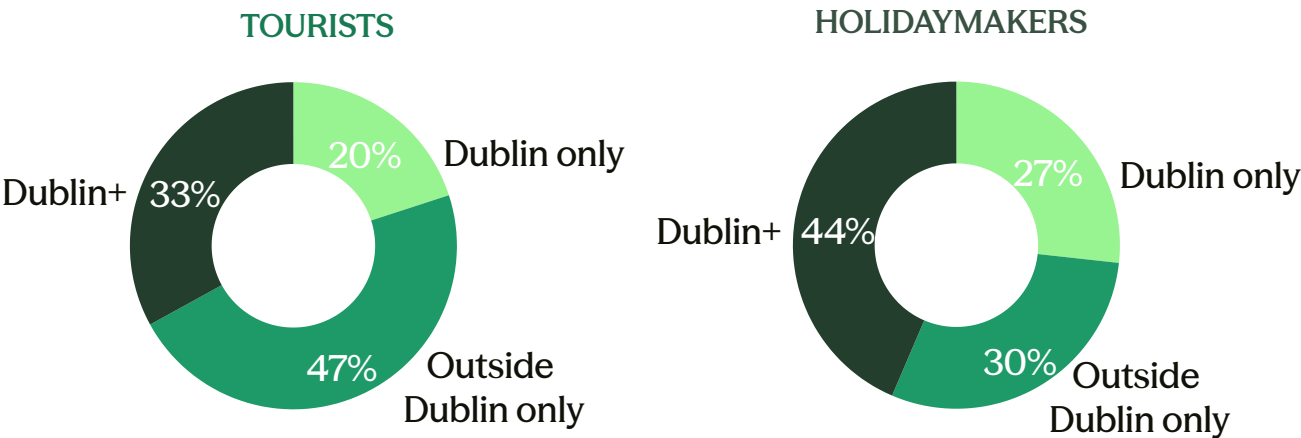
Top	Tourists	Holidaymakers
1	Dublin	Dublin
2	Northern Ireland	Northern Ireland
3	South-West	West



Dublin: Dublin City and County.
Midlands / Mid-East: Laois, Longford, Louth, Offaly, Westmeath, Kildare, Meath, Wicklow.
South-East: Carlow, Kilkenny, Waterford, Wexford.
South-West: Cork, Kerry.
Mid-West: Clare, Limerick, Tipperary.
West: Galway, Mayo, Roscommon.
Border: Cavan, Donegal, Leitrim, Monaghan, Sligo.
Northern Ireland: Antrim, Armagh, Down, Fermanagh, Derry-Londonderry, Tyrone

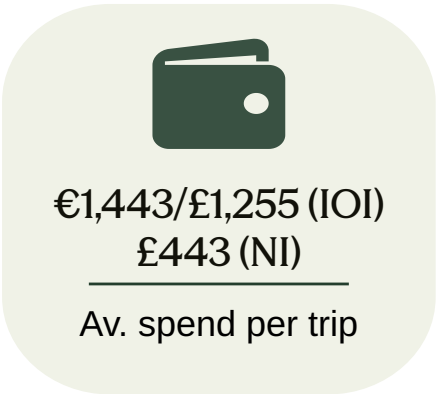
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Around half (46%) of tourists from Australia and New Zealand visited outside Dublin only, compared to 30% of holidaymakers who prefer to visit both Dublin and other regions.



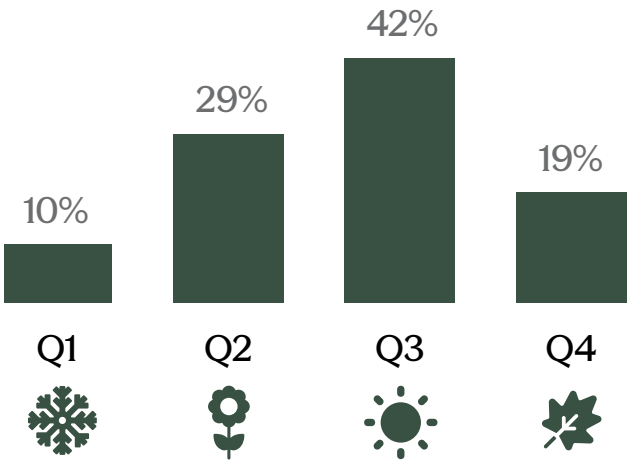
INBOUND HOLIDAYMAKERS

Australia and New Zealand were the island of Ireland’s sixth-largest source of overseas holiday revenue and holiday nights, and the ninth largest source of holidaymakers. ANZ holidaymakers stayed an average of 9.8 nights on the island of Ireland. Those visiting Northern Ireland stayed an average of 4.5 nights.



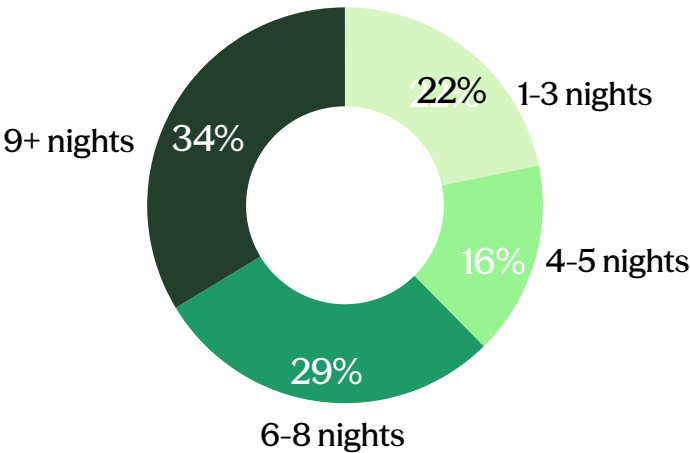
WHEN DID OUR HOLIDAYMAKERS VISIT?

Holidaymakers from Australia and New Zealand are most likely to visit the island of Ireland during the warmer months, with Q3 attracting the largest share of arrivals.



HOW LONG DID OUR HOLIDAYMAKERS STAY?

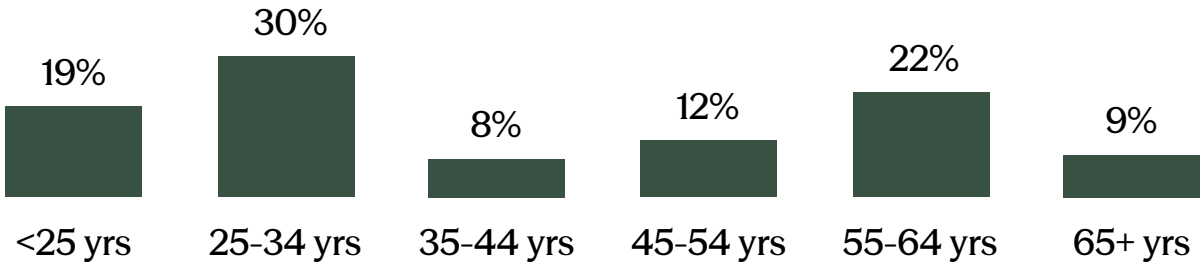
Most ANZ holidaymakers (62%) stayed on the island of Ireland for six or more nights.



INBOUND HOLIDAYMAKERS

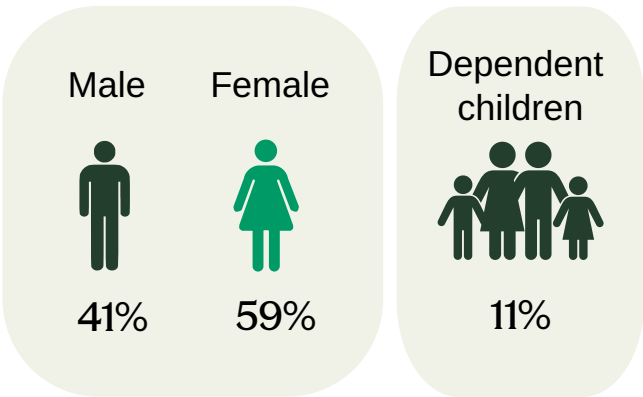
WHAT AGE WERE OUR HOLIDAYMAKERS?

Around half of ANZ holidaymakers (49%) were aged under 35, although there was a broad distribution across all age groups.



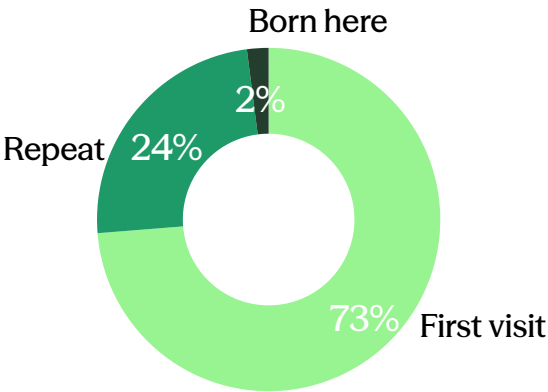
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN*

ANZ holidaymakers are broadly gender-balanced with a slight skew towards females. A minority (11%) had dependent children in their household.



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

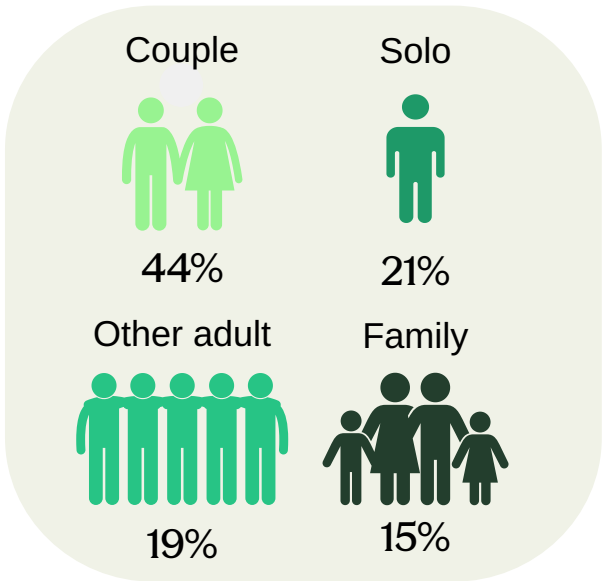
This was a first visit for the majority (73%) of ANZ holidaymakers, while 2% were born on the island of Ireland.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Over two-fifths (44%) of ANZ holidaymakers visited the island of Ireland with their partner/spouse.

One in five travelled solo (21%) and a similar proportion travelled with other adults (19%).



*Survey of Overseas Travellers only

INBOUND HOLIDAYMAKERS

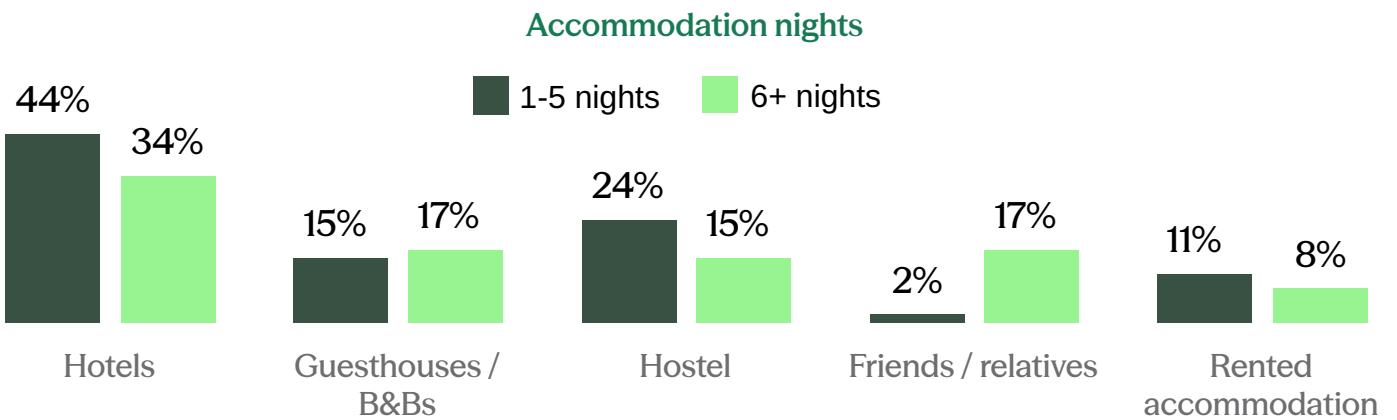
WHERE DID OUR HOLIDAYMAKERS STAY?

Over one-third (35%) of nights stayed by ANZ holidaymakers were in hotels, while around one in seven (14%) nights were spent with friends or relatives.



HOW DID ACCOMMODATION CHOICE VARY BY LENGTH OF STAY?*

Hotels account for the largest share of ANZ holiday nights, regardless of trip length. They make up an even higher proportion of nights among short-break holidaymakers, alongside hostels. For longer stays of six nights or more, guesthouses/B&Bs and stays with friends and family account for a larger share of holiday nights.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?*

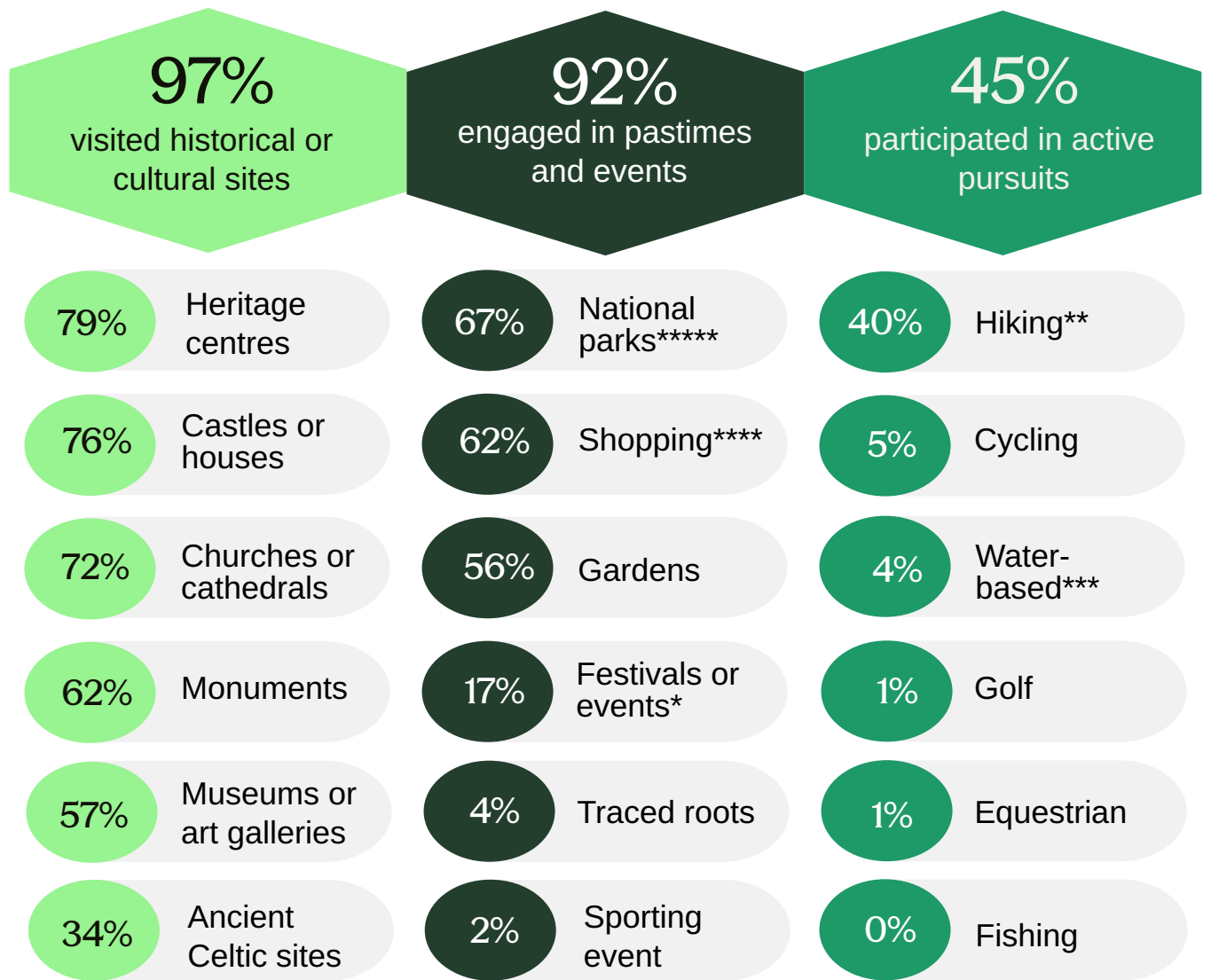
The majority (93%) of ANZ holidaymakers travelled independently and around half (51%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

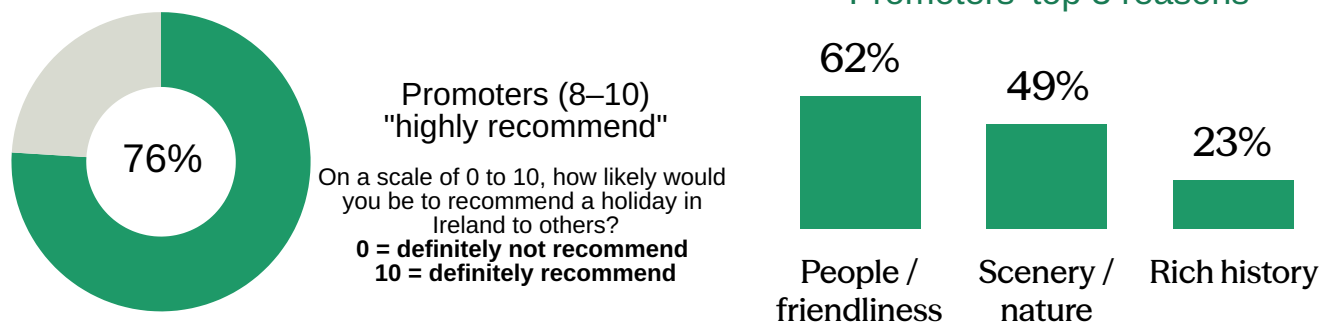
ANZ holidaymakers are engaged tourists. They explored our historical sites and engaged in multiple pastimes while on the island of Ireland.



*incl. concerts | **incl. cross-country walking | ***excl. fishing and swimming | ****excl. food/drink/souvenirs | *****incl. forests

LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS

Three in four ANZ holidaymakers would recommend a holiday on the island of Ireland to others. The main reasons given are the friendly people (62%), our scenery and nature (49%) and our rich history (23%).



OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from ANZ use multiple sources of inspiration when choosing a holiday destination, including family and friends' recommendations and general online searches.

While social media, for example, is cited in its own right, it's often also a channel for the discovery of travel articles and recommendations.

c. One in two were inspired by recommendations from family and friends

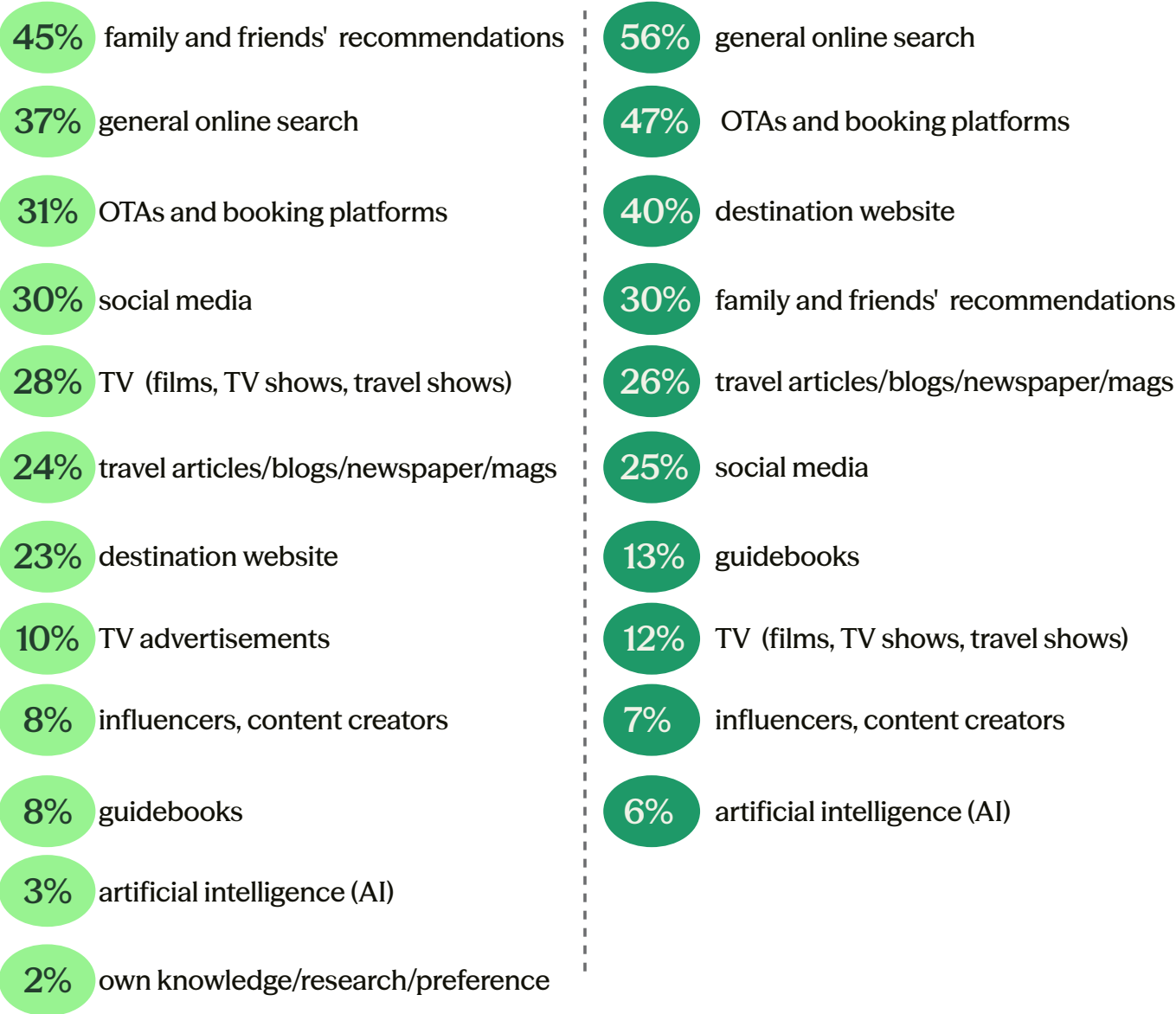
Most holidaymakers (56%) use general online search to plan their trip

DREAMING



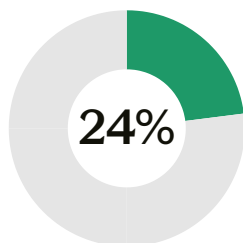
RESEARCH AND PLANNING

BASED ON RESPONDENTS' TOP 3 SOURCES

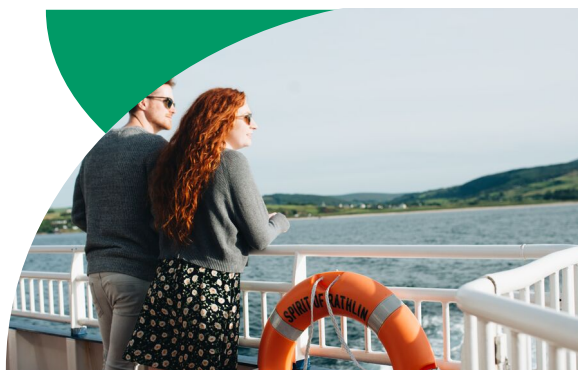
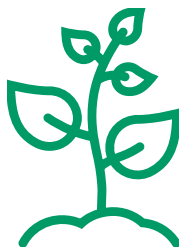


ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



of outbound
holidaymakers



WHO ARE THE ENRICHMENT EXPLORERS AS PEOPLE?

Embracing a lifestyle centred around **exploration**, they exude passion and consistently seek **fresh experiences**. They place **emphasis on human connection which extends to their travels**, with great importance placed on **engaging with local communities**. They have a wide **variety of hobbies and interests**, with **learning and experiencing new things high on their priority list** – even during their free time on holiday.

WHAT DO THEY LOOK FOR ON A HOLIDAY?

Passionate about travelling, these holidaymakers **enjoy going off the tourist trail to obtain the most authentic experience**. Regardless of the chosen destination, Enrichment Explorers aspire to **immerse themselves in the country's richness, exploring wildlife and nature** and discovering their passion for art, history and culture.

They are less likely to have children and most likely to travel with a partner

TOP 10 HOLIDAY NEEDS

- | | | | | | |
|---|---|--|----|---|---|
| 1 |  | To feel connected to nature | 6 |  | To experience living like a local |
| 2 |  | To broaden and stimulate my mind | 7 |  | To enjoy authentic moments with friendly locals |
| 3 |  | To feel the character of the place and people | 8 |  | To be transported back in history |
| 4 |  | To appreciate historical/modern architecture | 9 |  | To discover and explore somewhere new |
| 5 |  | To experience the vibrancy of the place and people | 10 |  | To enjoy the beauty of the landscape |