



AUSTRIA

MARKET PROFILE 2025

INBOUND TOURISTS

In 2025, the island of Ireland welcomed 43,000 Austrian tourists, who spent €52/£45 million and stayed 482,000 nights. Austria was the island's fourteenth-largest overseas market by spend, tourists and nights.



€52/£45m
revenue

#14
global rank



43k
trips

#14
global rank



482k
nights

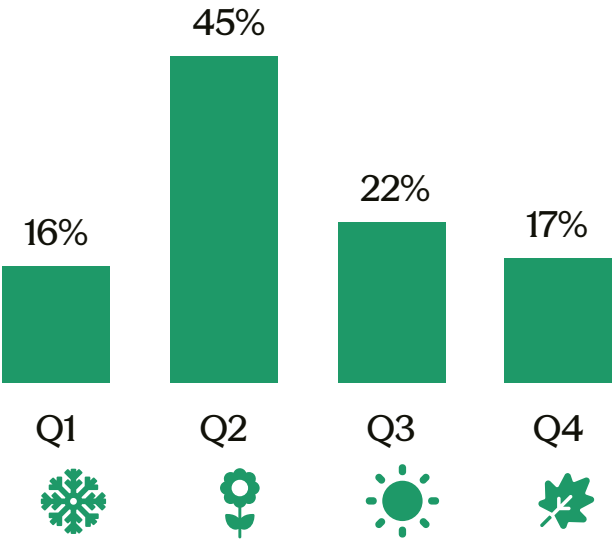
#14
global rank

WHERE DID OUR TOURISTS VISIT?



WHEN DID OUR TOURISTS VISIT?

Austrian tourism was strongest during the Q2, with almost half (45%) of visits taking place between April and June.



INBOUND TOURISTS

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Holiday travel remained the primary reason for Austrian visits to the island of Ireland, accounting for three-fifths (60%) of trips and generating almost half (45%) of tourism revenue.

		REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
	HOLIDAY	€23/£20m	45%	26k	60%	154k	32%
	VFR	€3/£3m	6%	7k	17%	47k	10%
	BUSINESS	€17/£15m	34%	8k	18%	177k	37%
	OTHER	€7/£6m	14%	3k	7%	105k	22%

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

In 2025, Austrian tourists stayed an average of 11.2 nights on the island of Ireland and spent €1,203/£1,047 per trip, equivalent to €107/£93 per night.



€1,203/£1,047 (IOI)
£345 (NI)

Av. spend per trip



€107/£93 (IOI)
£96 (NI)

Av. spend per night



11.2 (IOI)
3.6 (NI)

Av. stay (nights)

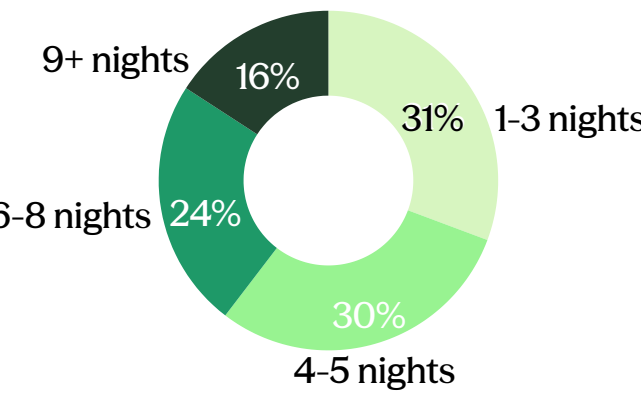
HOW DID OUR TOURISTS SPEND THEIR MONEY?

Food and drink accounted for the largest share (57%) of Austrian tourist spend, well ahead of accommodation and all other trip costs.

Food & drink	Accomm.	Shopping
		
57%	19%	11%
Transport	Entertainment	Misc.
		
7%	5%	0%

HOW LONG DID OUR TOURISTS STAY?

Three-fifths (60%) of Austrian visitors stayed up to five nights.



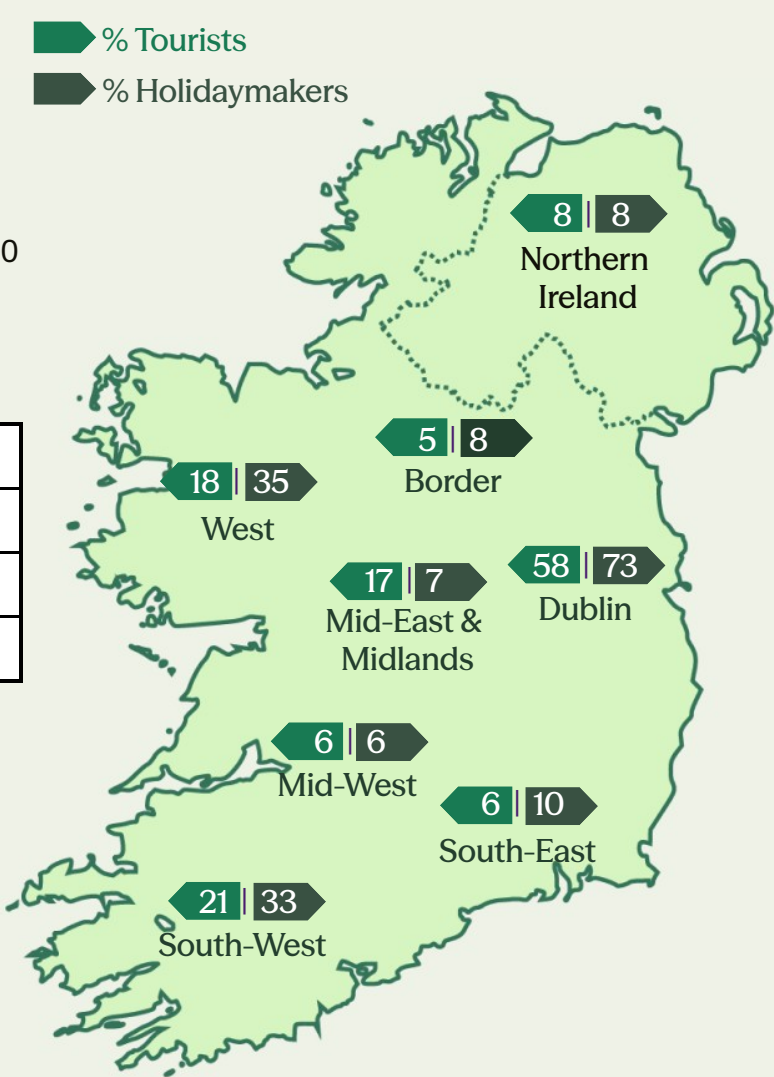
INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin, the South-West and the West were the most visited destinations on Austrian travel itineraries for both tourists and holidaymakers.

Cross-border travel featured in many Austrian itineraries, with approximately 2,000 tourists and holidaymakers overnighing on both sides of the border.

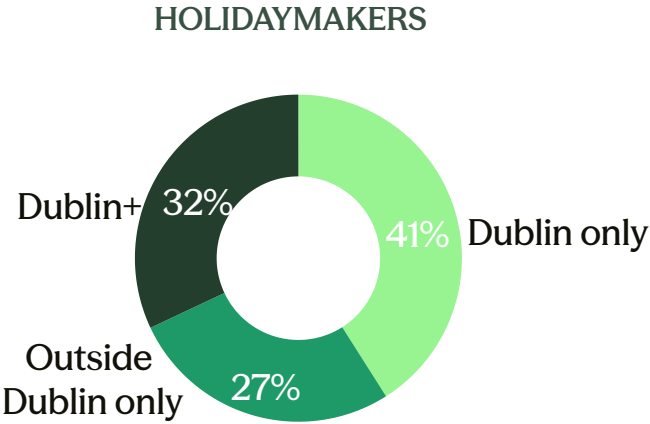
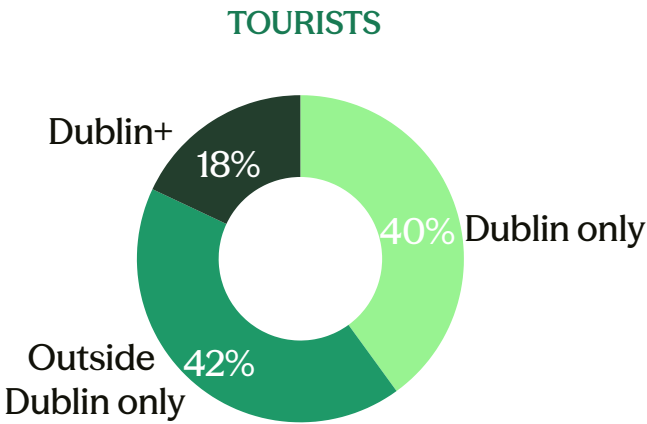
Top	Tourists	Holidaymakers
1	Dublin	Dublin
2	South-West	West
3	West	South-West



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

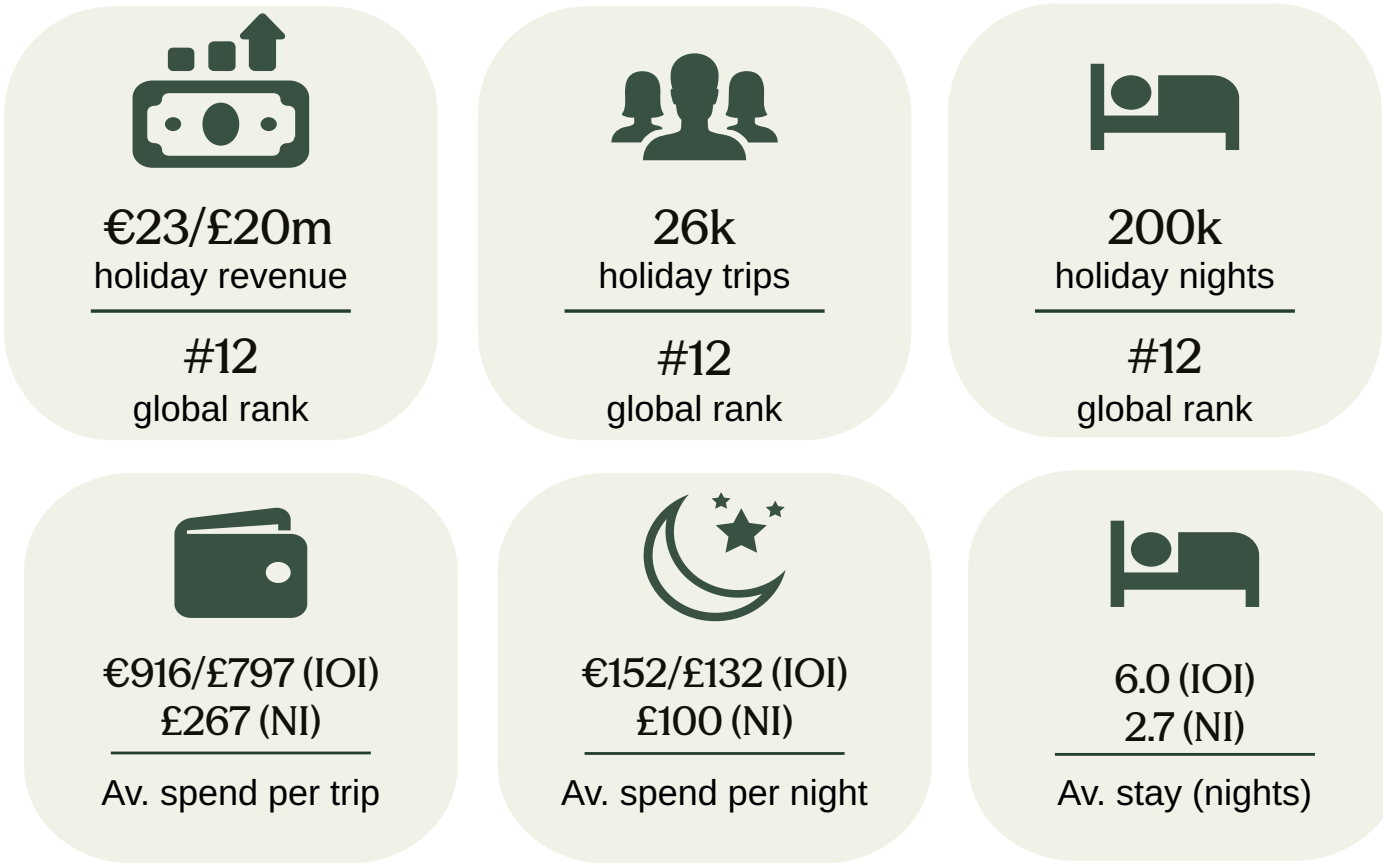
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was on the itinerary for a greater proportion of holidaymakers than tourists (73% vs. 58%), with one in three (32%) exploring Dublin as well as other regions.



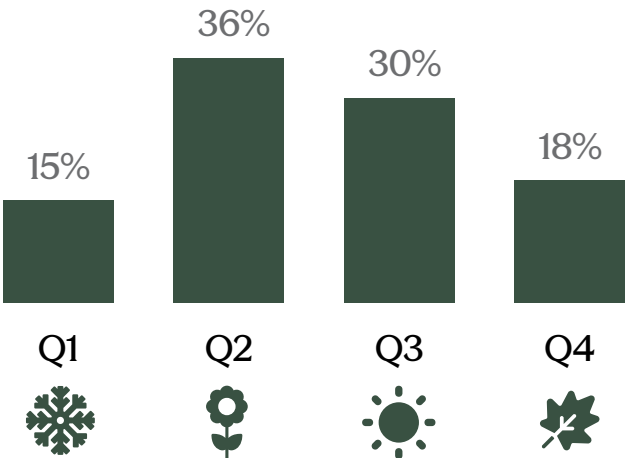
INBOUND HOLIDAYMAKERS

Austria was the island of Ireland’s twelfth-largest source of overseas holiday revenue, trips and nights. Austria holidaymakers stayed an average of six nights on the island of Ireland. Those visiting Northern Ireland stayed an average of 2.7 nights.



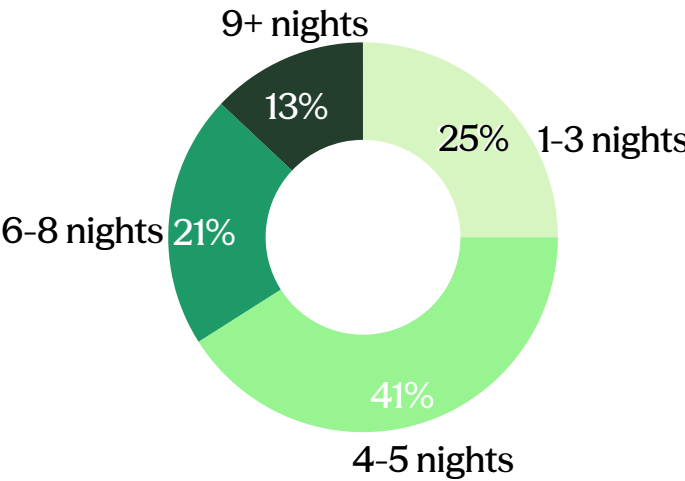
WHEN DID OUR HOLIDAYMAKERS VISIT?

Spring and summer remained the key travel period, with two-thirds (67%) of Austrian holidaymakers visiting between April and September.



HOW LONG DID OUR HOLIDAYMAKERS STAY?

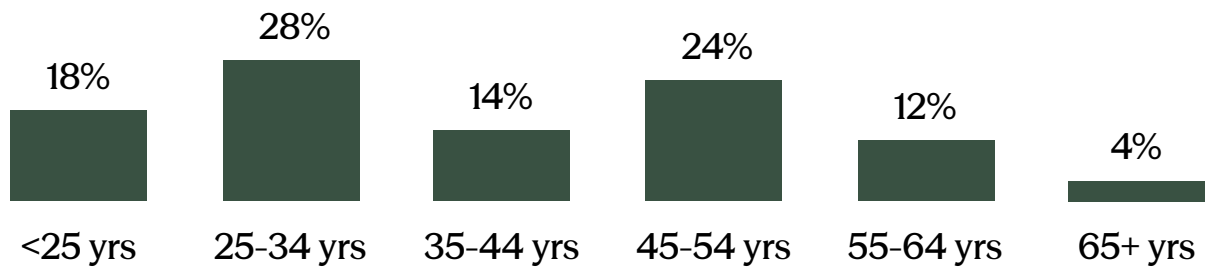
Two-thirds of Austrian holidaymakers (66%) stayed on the island of Ireland for a break of up to five nights.



INBOUND HOLIDAYMAKERS

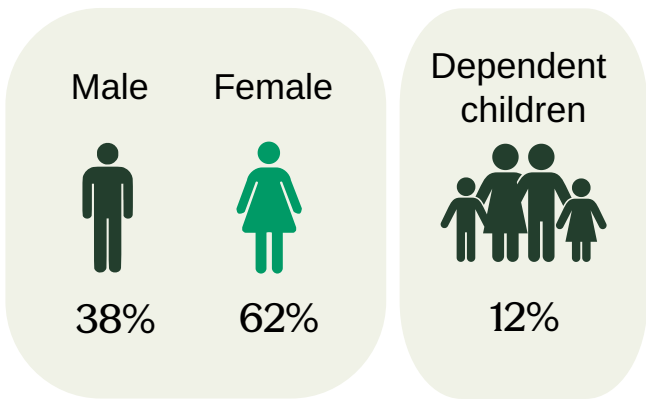
WHAT AGE WERE OUR HOLIDAYMAKERS?

The island of Ireland appeals to a broad age range of Austrian holidaymakers aged under 65.



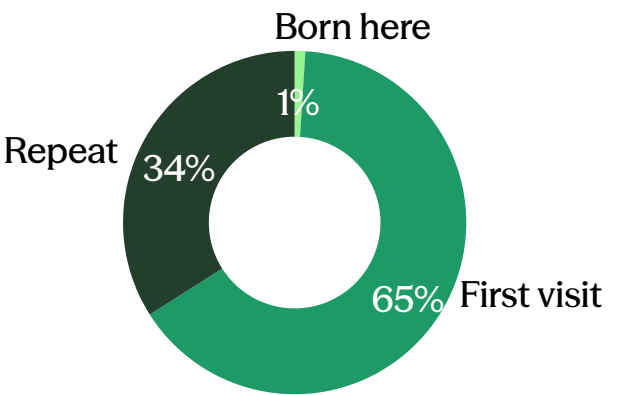
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN*

Austrian holidaymakers were broadly gender-balanced with a slight skew towards females. One in eight Austrian holidaymakers had dependent children in their household.



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

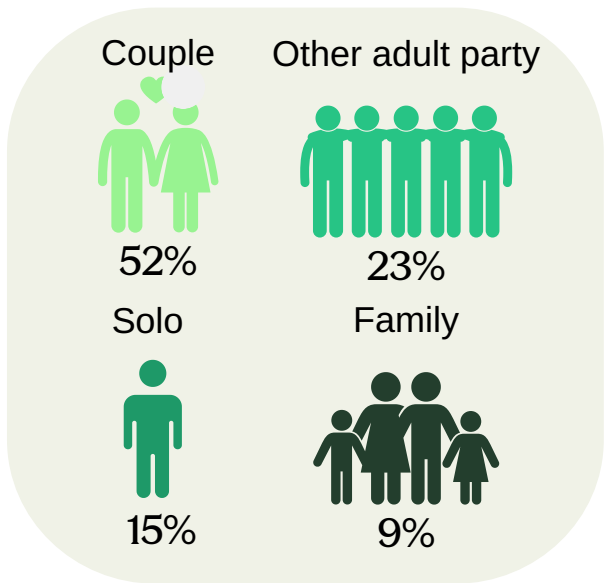
For almost two-thirds (65%) of Austrian holidaymakers, 2025 marked their first visit to the island of Ireland.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Over half (52%) of Austrian holidaymakers visited the island of Ireland with their partner/ spouse.

Almost one-quarter (23%) travelled with other adults.

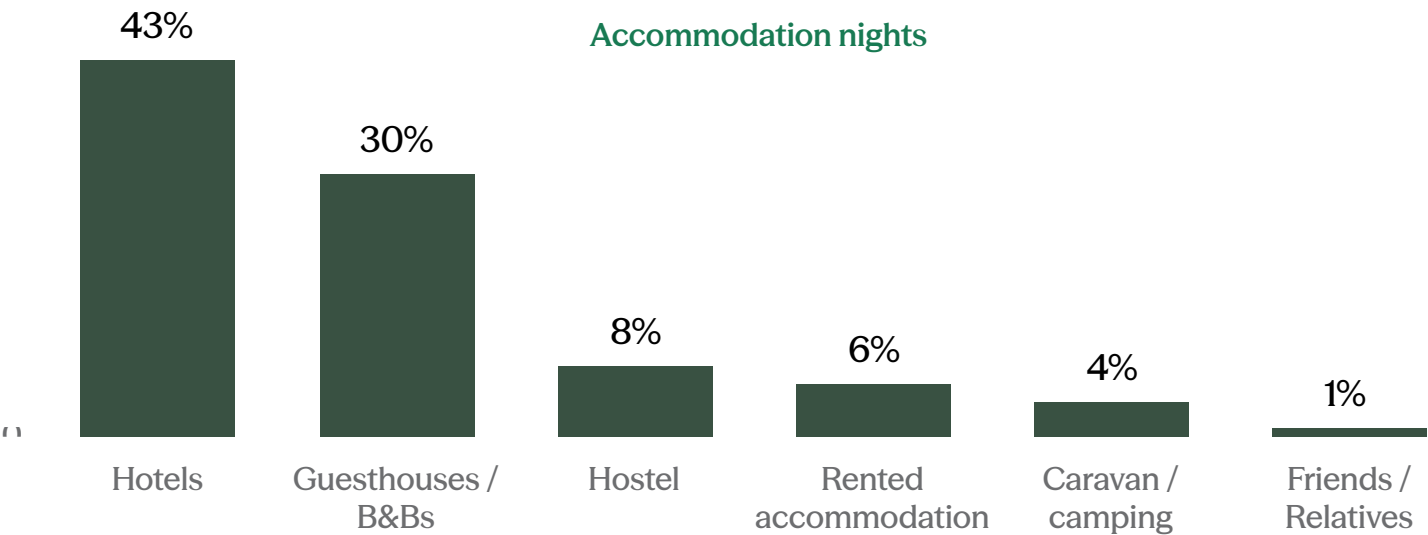


*Survey of Overseas Travellers only
Source: Fáilte Ireland's Survey of Overseas Travellers, NISRA

INBOUND HOLIDAYMAKERS

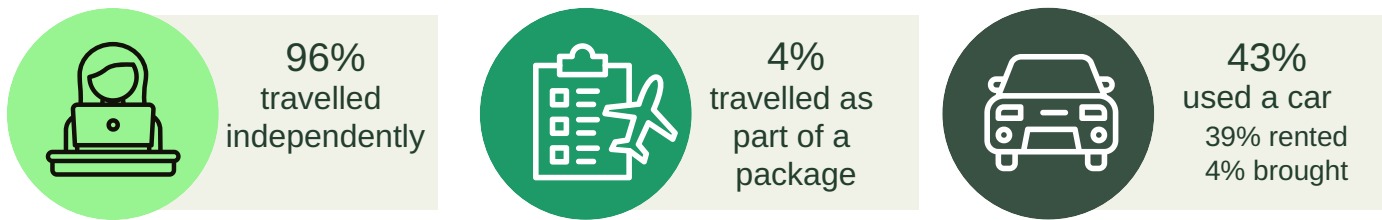
WHERE DID OUR HOLIDAYMAKERS STAY?

Almost half (43%) of nights stayed by Austrian holidaymakers were in hotels, while over one-third (30%) nights were spent in guesthouses & B&Bs.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?*

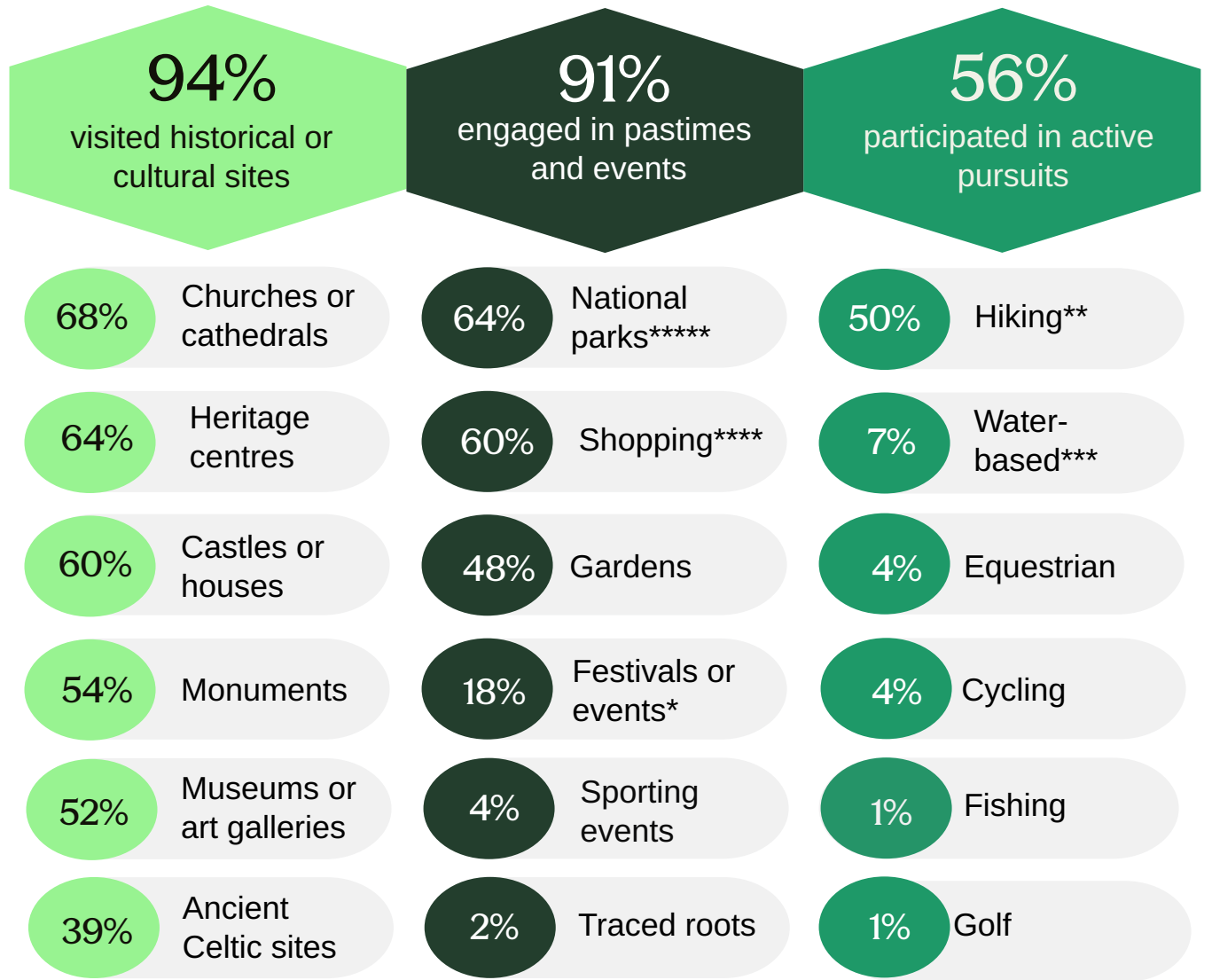
Almost all (96%) Austrian holidaymakers travelled independently and two-fifths (43%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

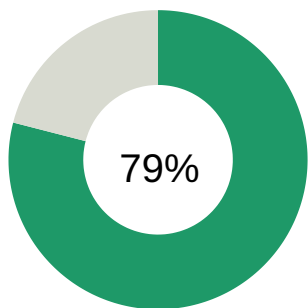
Austrian holidaymakers are engaged tourists. They explored our historical sites and engaged in multiple pastimes while on the island of Ireland.



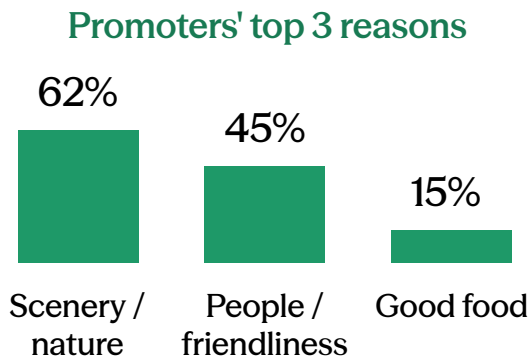
*incl. concerts | **incl. cross-country walking | ***excl. fishing and swimming | ****excl. food/drink/souvenirs | *****incl. forests

LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS*

Almost four-fifths (79%) of Austrian holidaymakers would recommend a holiday in Ireland to others. The main reasons given are our scenery and nature (62%), the friendly people (45%) and, to a lesser degree, good food (15%).



Promoters (8-10)
"highly recommend"
On a scale of 0 to 10, how likely would you be to recommend a holiday in Ireland to others?
0 = definitely not recommend
10 = definitely recommend



OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Austrian outbound holidaymakers rely on multiple sources at different stages of their travel journey.

Austrian holidaymakers are most often inspired by people they trust, but turn to online search and official travel sources when planning their trip.

44% were inspired by recommendations from family and friends

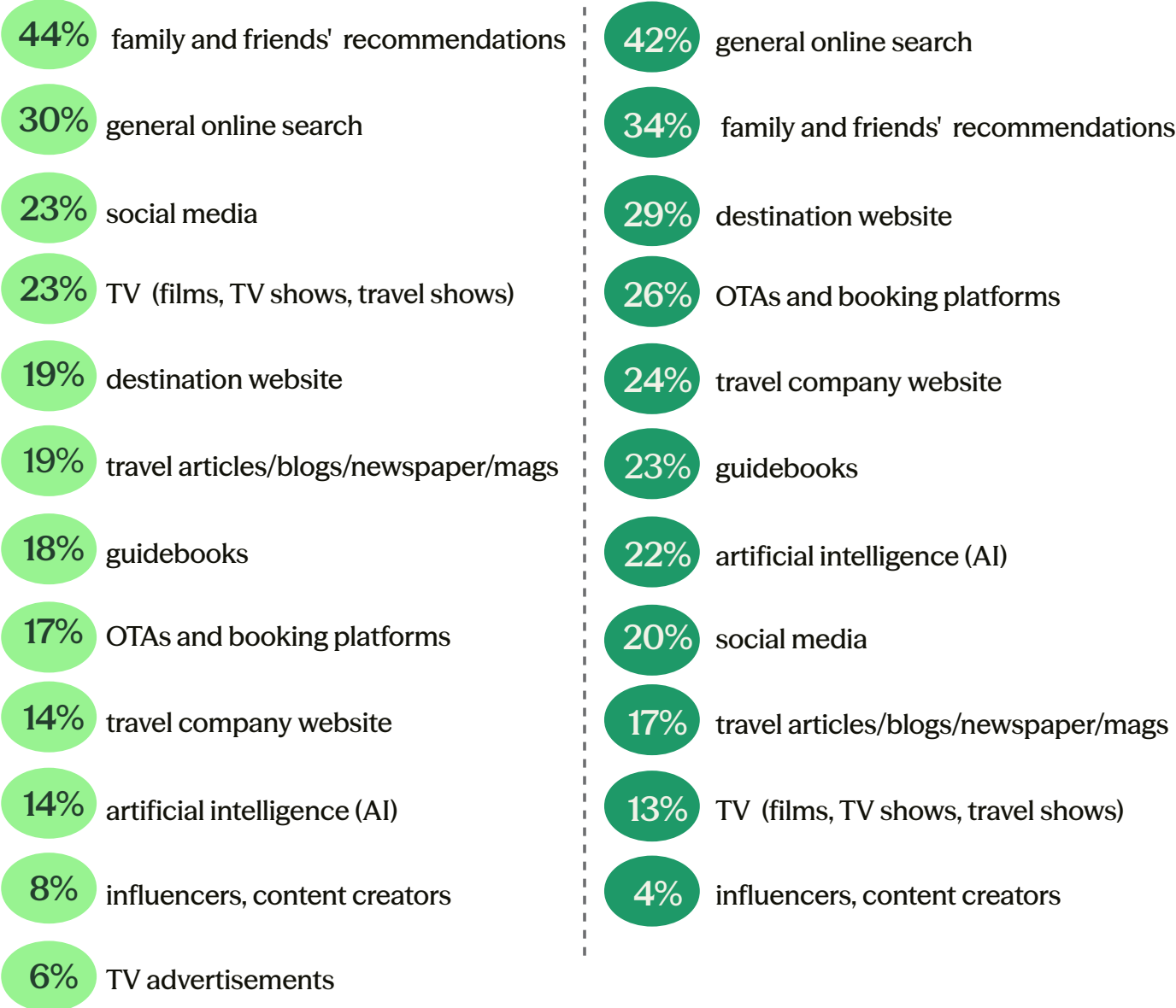
As travellers move into planning, digital channels take centre stage, led by general online search (42%).

DREAMING



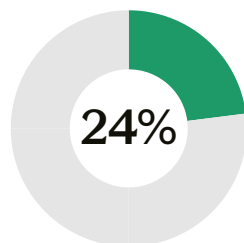
RESEARCH AND PLANNING

BASED ON RESPONDENTS' TOP 3 SOURCES

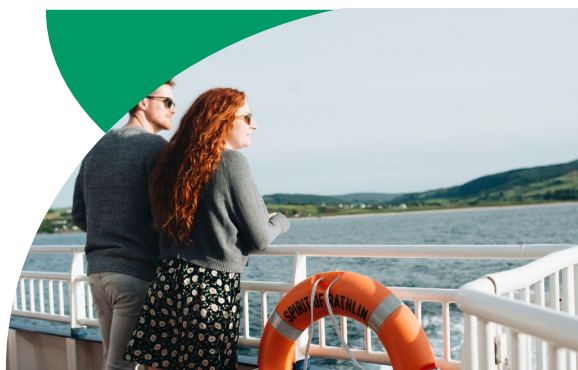
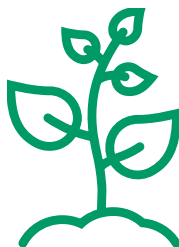


ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



of Global
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

2



To broaden and stimulate my mind

3



To feel the character of the place and people

4



To appreciate historical/modern architecture

5



To experience the vibrancy of the place and people

6



To experience living like a local

7



To enjoy authentic moments with friendly locals

8



To be transported back in history

9



To discover and explore somewhere new

10



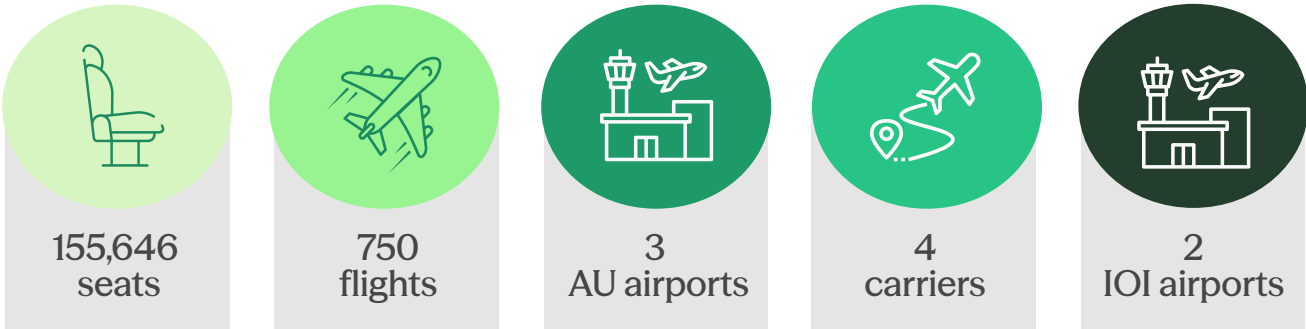
To enjoy the beauty of the landscape

OUTBOUND TOURISTS

In 2025, Austria was the world’s twenty-first-largest outbound market, with 91% of its outbound trips going to other parts of Europe.

ACCESS BY AIR

In 2025, more than 750 flights from 3 gateways in Austria provided over 155,000 direct one-way air seats to the island of Ireland.



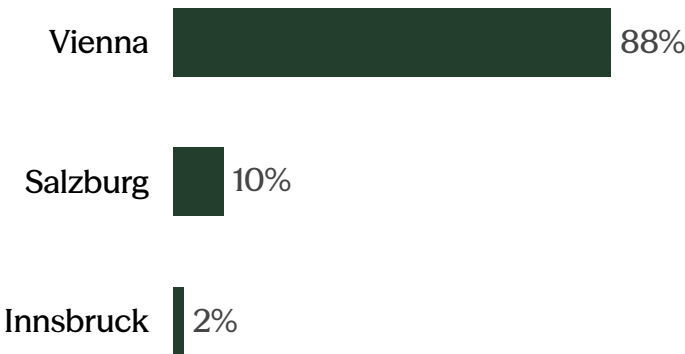
WHERE CAN OUR TOURISTS FLY FROM?

Vienna International Airport dominated air access from Austria, accounting for almost nine-tenths (88%) of available seat capacity.

WHO CAN OUR TOURISTS FLY WITH?

Four carriers operated direct routes between Austria and the island of Ireland in 2025. Ryanair was the leading carrier accounting for 65% of available seat capacity, followed by Aer Lingus at 29%.

SHARE OF SEATS BY AIRPORT



SHARE OF SEATS BY CARRIER

