

GREAT BRITAIN MARKET PROFILE 2024

Table of Contents

INBOUND TOURISTS	3
WHERE DID OUR TOURISTS COME FROM?.....	3
WHERE DID OUR TOURISTS VISIT?.....	3
WHEN DID OUR TOURISTS VISIT?	3
WHAT WERE OUR TOURISTS' REASONS FOR VISITING?	4
HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?	4
HOW DID OUR TOURISTS SPEND THEIR MONEY?	4
HOW LONG DID OUR TOURISTS STAY?.....	4
INBOUND TOURISTS AND HOLIDAYMAKERS.....	5
WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?.....	5
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?.....	6
INBOUND HOLIDAYMAKERS.....	6
WHEN DID OUR HOLIDAYMAKERS VISIT?.....	7
HOW LONG DID OUR HOLIDAYMAKERS STAY?	7
WHAT AGE WERE OUR HOLIDAYMAKERS?	7
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN	7
HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?	8
WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?	8
WHERE DID OUR HOLIDAYMAKERS STAY?	8
HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?	8
HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?	9
WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?	9
LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS.....	10
OUTBOUND HOLIDAYMAKERS.....	10
SOURCES OF INSPIRATION, RESEARCH AND PLANNING.....	10
ENRICHMENT EXPLORERS	11
OUR TARGET SEGMENT	11
Segment Size	11
WHO ARE THE ENRICHMENT EXPLORERS AS PEOPLE?	11

WHAT DO THEY LOOK FOR ON A HOLIDAY?	11
TOP 10 HOLIDAY NEEDS	11
OUTBOUND TOURISTS.....	12
ACCESS BY AIR	12
WHERE CAN OUR TOURISTS FLY FROM?.....	12
Share of seats by airport (top 10)	12
WHO CAN OUR TOURISTS FLY WITH?	13
Airline share of seats	13
ACCESS BY SEA	13

INBOUND TOURISTS

The island of Ireland welcomed almost 4 million British tourists who spent €1.8/£1.6 billion and stayed 19 million nights in 2024. This makes Great Britain the island's largest source of overseas tourists and nights, and the second largest source of revenue.

Metric	Revenue	Trips	Nights
Value	€1.8 / £1.6 billion	4.0 million	19.0 million
Global rank	2	1	1

WHERE DID OUR TOURISTS COME FROM?

The majority (79%) of British tourists visiting the island of Ireland came from England in 2024.

England 79%

Scotland 17%

Wales 4%

WHERE DID OUR TOURISTS VISIT?

Northern Ireland 1.4 million

Republic of Ireland 2.7 million

*Visits to Ireland and Northern Ireland total more than the island figure due to tourists overnighting both sides of the border.

WHEN DID OUR TOURISTS VISIT?

Over half (55%) of British tourists visited the island during Q2 and Q3 (April - September).

Tourist trips Qtr 1	22%
Tourist trips Qtr 2	27%
Tourist trips Qtr 3	29%
Tourist trips Qtr 4	22%

Footer: Source: CSO, NISRA, Fáilte Ireland's Survey of Overseas Travellers

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Visiting friends and/or relatives (VFR) was the most popular (47%) reason for visiting and they accounted for 32% of Britain's tourism revenue. While British holidaymakers were fewer in number (29% of British tourists), they also accounted for more than a third (35%) of Britain's revenue.

Purpose of Visit breakdown	Rev €m	Rev £m	Rev share	Trips K	Trips share	Nights k	Nights share
Holiday	635	522	35%	1,159	29%	5,205	27%
Visit friends and/or relatives	570	496	32%	1,858	47%	9,967	52%
Business	427	372	24%	716	18%	2,601	14%
Other	174	152	10%	270	7%	1,257	7%

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

On average, British tourists spent €454/£395 per trip or €95/£83 per night and stayed 4.8 nights on the island of Ireland in 2024.

	IOI €	IOI £	NI
Average spend per trip	€454	£ 395	£ 289
Average spend per night	€95	£83	£71
Average stay (nights)	4.8		4.1

HOW DID OUR TOURISTS SPEND THEIR MONEY?

British tourists spent more on food and drink (41%) than on accommodation or any other element of their stay.

Breakdown of spend

Food & drink	41%
Accommodation	31%
Shopping	11%
Transport	10%
Entertainment	6%
Misc	2%

HOW LONG DID OUR TOURISTS STAY?

The majority (55%) visited the island of Ireland for a short break of up to three nights.

Length of stay

1-3 nights	55%
4-5 nights	22%
6-8 nights	12%
9+ nights	11%

INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Northern Ireland, Dublin and the South-West were the most popular areas for both British tourists and holidaymakers. Almost 122,000 British tourists and 46,000 holidaymakers overnighted on both sides of the border.

Regionality Tourists | Holidaymakers

Border	6% 7%
Dublin	31% 35%
Mid West	8% 9%
South East	5% 3%
South West	11% 12%
West	7% 11%
Mid-East & Midlands	9% 4%
Northern Ireland	36% 38%

Top 3 regions: Tourists Holidaymakers

1	Northern Ireland	Northern Ireland
2	Dublin	Dublin
3	South 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?

The majority of British tourists (74%) and holidaymakers (70%) overnighed in areas outside Dublin on their trip, driven by overnights in Northern Ireland (36% of tourists, 38% of holidaymakers).

	Tourists	Hols
Dublin only	26%	30%
Regions only/Outside Dublin only	69%	64%
DUB+	4%	6%

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

Dublin+ = Dublin as well as area(s) outside Dublin

INBOUND HOLIDAYMAKERS

Great Britain was the island of Ireland's largest source of holidaymakers (34%) and second largest source of overseas holiday revenue (18%) and holiday nights (24%). British holidaymakers typically visited the island for a short break, spending an average of 4.5 nights on the island of Ireland. British holidaymakers who visited Northern Ireland stayed 3.1 nights on average.

	Million	Rank
Holiday revenue spend €	635	2
Holiday revenue spend £	552	
Holiday trips	1.2	1
Holiday nights	5.2	2

	Island of Ireland	Northern Ireland
Hol Av. Spend per trip	€548 £477	£ 341
Hol Av spend per night	€122 £106	£ 110
Hol Av. Stay (nights)	4.5	3.1

WHEN DID OUR HOLIDAYMAKERS VISIT?

Two-fifths (42%) of British holidaymakers visited during Q1 and Q4 (January - March and October - December).

Holiday trips	Share
Qtr 1	23%
Qtr 2	28%
Qtr 3	30%
Qtr 4	20%

HOW LONG DID OUR HOLIDAYMAKERS STAY?

The majority (62%) of British holidaymakers stayed up to three nights on the island of Ireland.

Holiday Length of stay	Share
1-3 nights	62%
4-5 nights	18%
6-8 nights	11%
9+ nights	8%

WHAT AGE WERE OUR HOLIDAYMAKERS?

The majority (53%) of British holidaymakers were under 45 years old.

< 25 years	12%
25-34 years	24%
35-44 years	17%
45-54 years	16%
55-64 years	18%
65 or older	12%

HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

A minority (20%) of British holidaymakers visiting the island of Ireland had dependent children in the household.

Dependent Children	20%
Male	48%
Female	52%

HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

Over half (54%) of British holidaymakers had previously visited while 7% were born on the island of Ireland.

First	38%
Repeat	54%
Born here	7%

WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Two-fifths (41%) of British holidaymakers visited the island of Ireland with their partner/spouse. One-in-five (22%) travelled with other adults.

Travel party

Couple	41%
Other adult party	22%
Family	19%
Solo	17%

WHERE DID OUR HOLIDAYMAKERS STAY?

Over two-fifths (41%) of nights stayed by British holidaymakers were in hotels, while around one-in-seven (14%) nights were spent with friends or family.

Accommodation type Nights

Hotel	41%
Guesthouse / B&B	18%
Friends & family	14%
Rented Accommodation	14%
Holiday home	7%
Other	9%

HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?

Hotels (62%) are especially popular among British holidaymakers on short breaks (1 - 5 nights) while staying with friends and family (21%), holiday homes (20%) and rented accommodation (17%) are more popular among longer-staying holidaymakers.

Length of Stay by Accomm Type	1 - 5 nights	6+ nights
Hotel	62%	20%
Guesthouse / B&B	12%	22%
Rented Accommodation	10%	10%
Holiday home	2%	16%
Friends & family	9%	21%

Other	6%	11%
-------	----	-----

HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

The majority (95%) of British holidaymakers travelled independently and over a third (37%) used a car while on the island of Ireland.

Independent travel	95%
Package	5%
Car used	37%
<i>Car hire</i>	19%
<i>Car brought</i>	14%
<i>Car borrowed/other</i>	4%

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

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

Any historical or cultural sites	71%
Historic Houses or Castles	39%
Visitor/heritage centre	39%
Churches or Cathedrals	38%
Monuments	28%
Museums or art galleries	26%
Ancient Celtic Sites	12%
Any pastimes & events	79%
Shopping	51%
Visited national parks and forests	29%
Visited gardens	26%
Attended a festival or cultural event or concert	14%
Attended an organised sporting event	5%
Traced roots or genealogy	3%
Any active pursuits	26%
Hiking / Cross Country Walking	21%
Cycling	4%
Water based activities (excluding fishing and swimming)	3%
Golf	3%
Fishing	2%
Equestrian pursuits	1%

LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS

The majority (82%) of British holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (50%), our scenery and nature (28%) and there's lots to see and do (14%).

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

Promoters (9 – 10 or "highly recommend"): 82%

Reasons for recommending:

The People/Friendliness 50%

Scenery/Beauty of countryside/Nature 28%

Lots to do 14%

OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from Great Britain 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.

1-in-2 cited getting inspired by recommendations from family and friends.

Most holidaymakers (62%) use general online search to plan their trip.

Inspiration

Recommendations from family and friends 55%

General online search (e.g., Google) 39%

Travel websites and online travel agencies (company websites, booking platforms) 26%

TV (films & TV shows, travel shows) 26%

Social media 25%

Travel articles/ blogs/ online travel forums/ newspaper/ magazines 24%

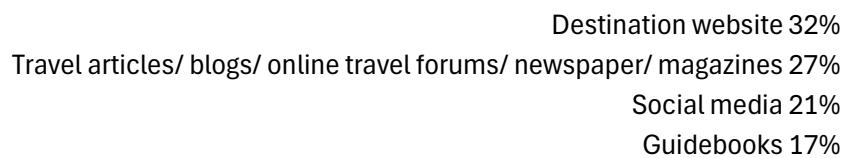
Destination website 14%

Planning

General online search (e.g., Google) 62%

Travel websites and online travel agencies (company websites, booking platforms) 43%

Recommendations from family and friends 34%



ENRICHMENT EXPLORERS

OUR TARGET SEGMENT

Segment Size

23% of British 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

Great Britain was the world's third-largest outbound market in 2024 and 77% of all outbound trips from Great Britain were to other parts of Europe.

ACCESS BY AIR

There were 12.3 million direct one-way air seats available on over 82,000 flights from 26 gateways in Great Britain to the island of Ireland in 2024.

Direct one-way seats	12.3 million
Direct flights	82,027
Market airports	23
Carriers	7
IOI airports	9

WHERE CAN OUR TOURISTS FLY FROM?

The top ten British airports accounted for the majority (87%) of seats in 2024. Around two-fifths (44%) of seats were delivered by four London-based airports (Heathrow, Gatwick, Stansted and Luton).

Share of seats by airport (top 10)

Heathrow	17%
Manchester	11%
Stansted	11%
Gatwick	10%
Edinburgh	8%
Birmingham	8%
Liverpool	7%
Luton	6%
Glasgow	5%
Bristol	4%
	<u>87%</u>

WHO CAN OUR TOURISTS FLY WITH?

Seven carriers operated between Great Britain and the island of Ireland. The majority (91%) of seats were delivered by 3 key carriers: Ryanair (43%), Aer Lingus (25%) and easyJet (23%).

Airline share of seats

Ryanair	43%
Aer Lingus	25%
EasyJet	23%
British Airways	8%
Others	1%

ACCESS BY SEA

Sailings	17,696
Carriers	3
IOI Routes	7
NI routes	3
ROI routes	4