

GREAT BRITAIN

MARKET PROFILE

2024



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.



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%

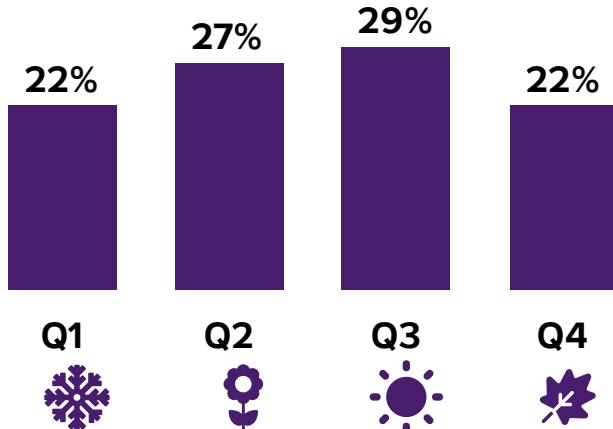
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?

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



INBOUND TOURISTS

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.

| | REVENUE | SHARE | TRIPS | SHARE | NIGHTS | SHARE |
|--|------------|-------|-------|-------|--------|-------|
|  HOLIDAY | €635/£522m | 35% | 1.2m | 29% | 5.2m | 27% |
|  VFR | €570/£496m | 32% | 1.9m | 47% | 10.0m | 52% |
|  BUSINESS | €427/£372m | 24% | 716k | 18% | 2.6m | 14% |
|  OTHER | €174/£152m | 10% | 270k | 7% | 1.3m | 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.



€454/£395 (IOI)
£289 (NI)

Av. spend per trip



€95/£83 (IOI)
£71 (NI)

Av. spend per night

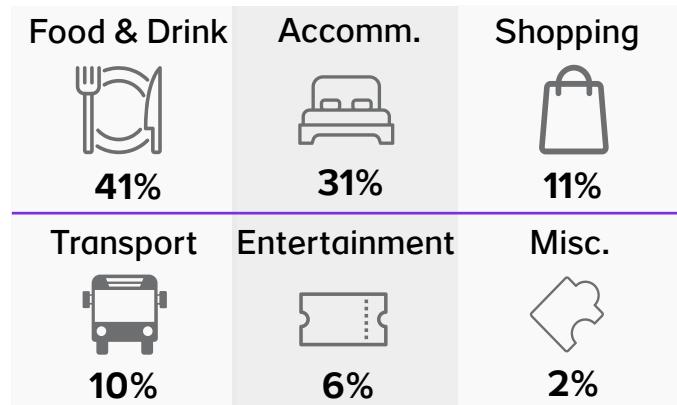


4.8 (IOI)
4.1 (NI)

Av. stay (nights)

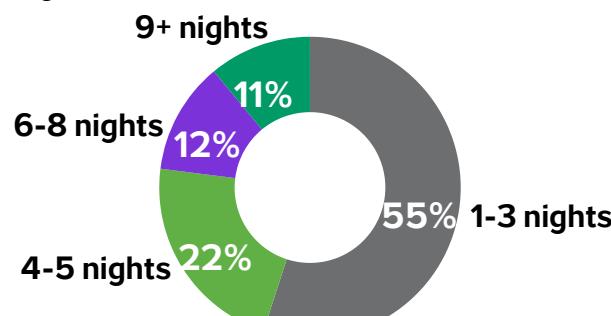
HOW DID OUR TOURISTS SPEND THEIR MONEY?

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



HOW LONG DID OUR TOURISTS STAY?

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



INBOUND TOURISTS AND HOLIDAYMAKERS

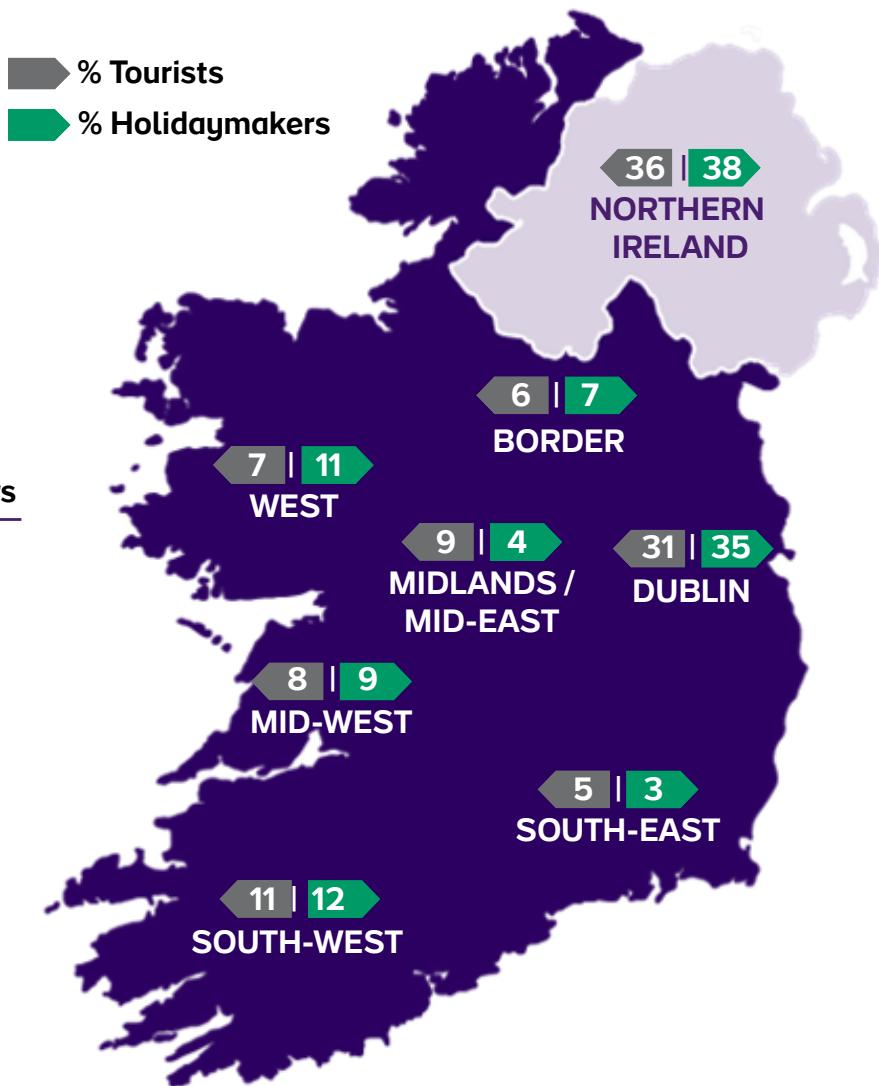
WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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 overnighed on both sides of the border.

| Rank | Tourists | Holidaymakers |
|------|------------------|------------------|
| #1 | Northern Ireland | Northern Ireland |
| #2 | Dublin | Dublin |
| #3 | South-West | South-West |

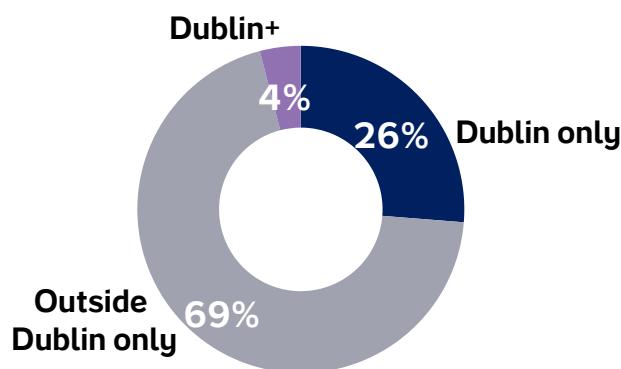
Dublin: Dublin City and County. Midlands / Mid-East: Laois, Longford, Louth, Offaly, Westmeath, Kildare, Meath, Wicklow. South-East: Carlow, Kilkenny, Waterford, Wexford. South-West: Cork, Kerry. Mid-West: Clare, Limerick, Tipperary. West: Galway, Mayo, Roscommon. Border: Cavan, Donegal, Leitrim, Monaghan,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



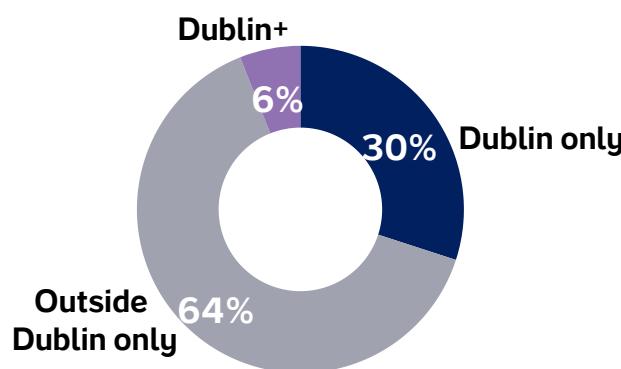
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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

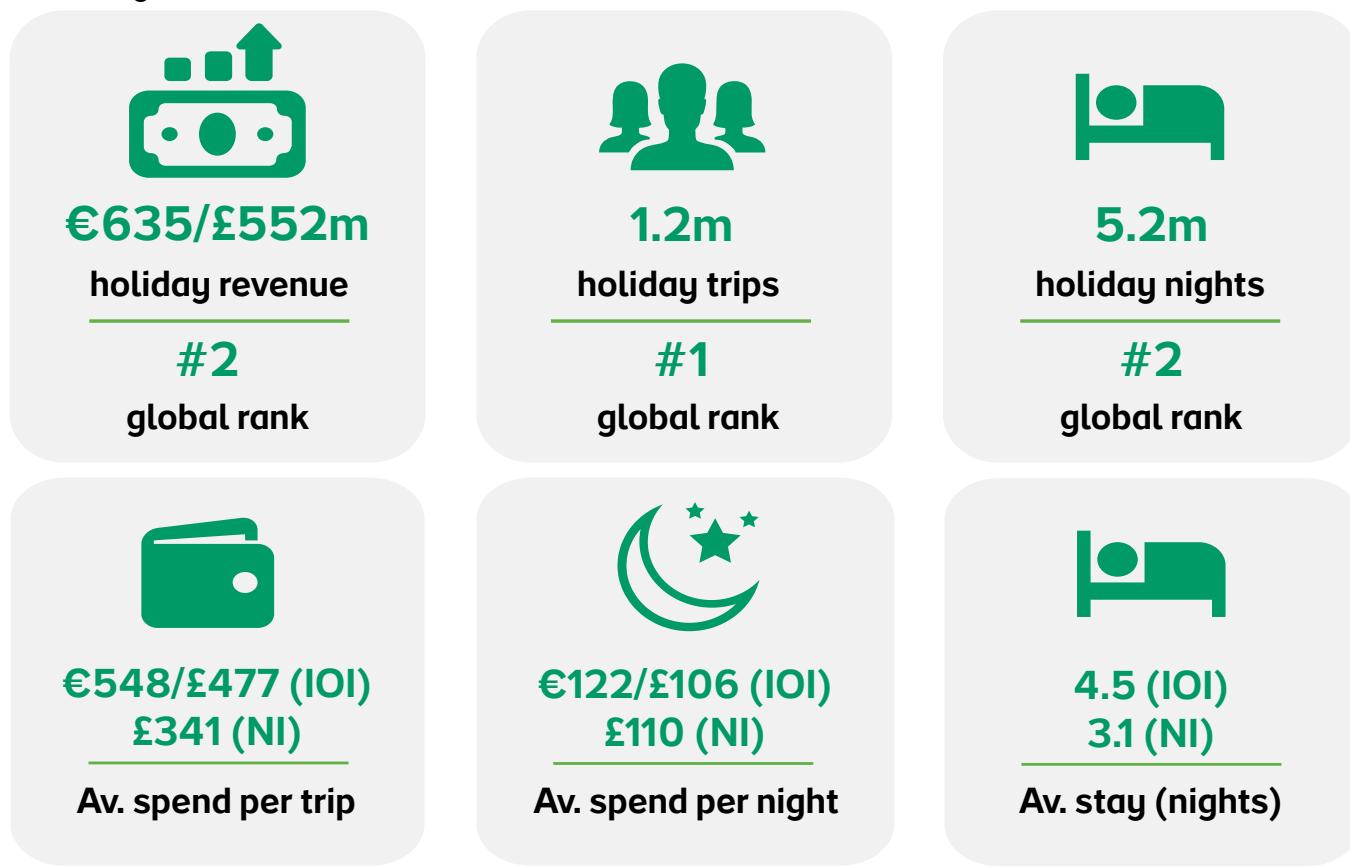


HOLIDAYMAKERS



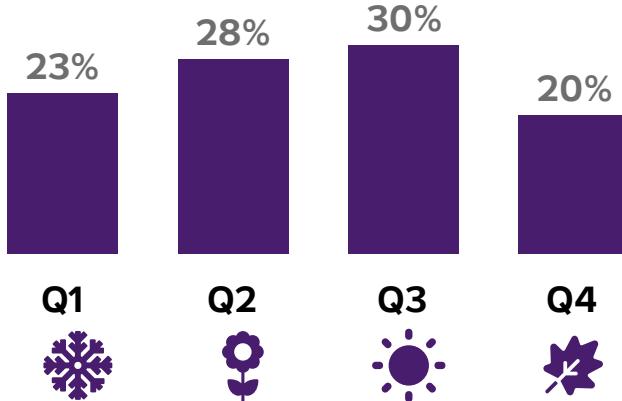
INBOUND HOLIDAYMAKERS

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.



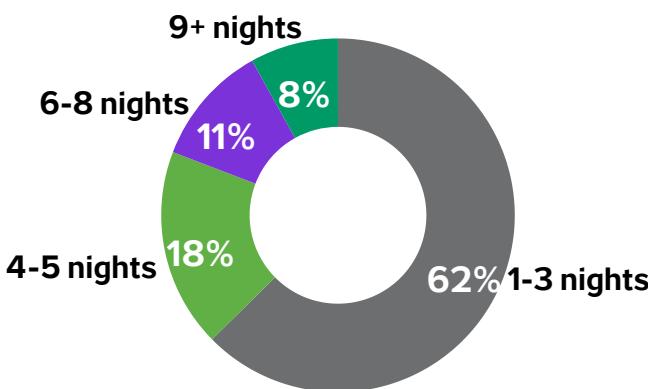
WHEN DID OUR HOLIDAYMAKERS VISIT?

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



HOW LONG DID OUR HOLIDAYMAKERS STAY?

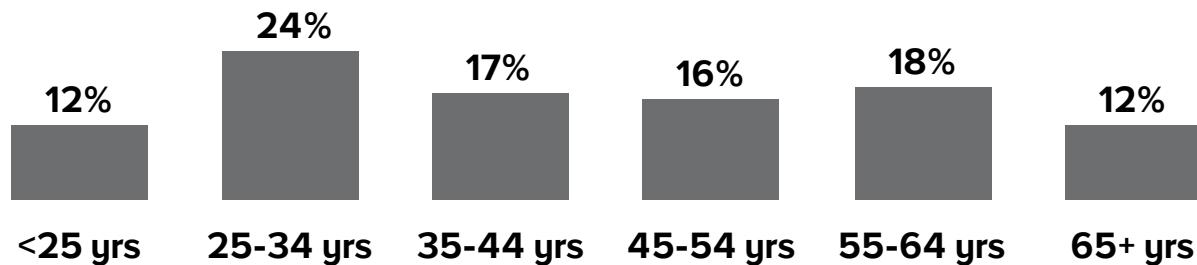
The majority (62%) of British holidaymakers stayed up to three nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

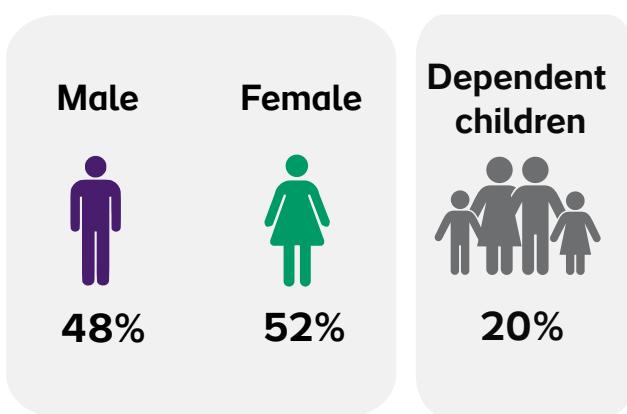
WHAT AGE WERE OUR HOLIDAYMAKERS?

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



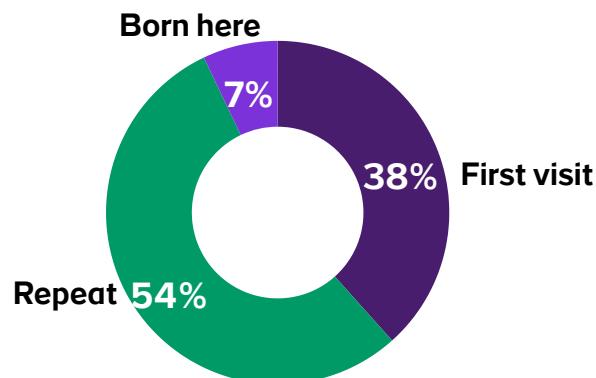
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

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



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

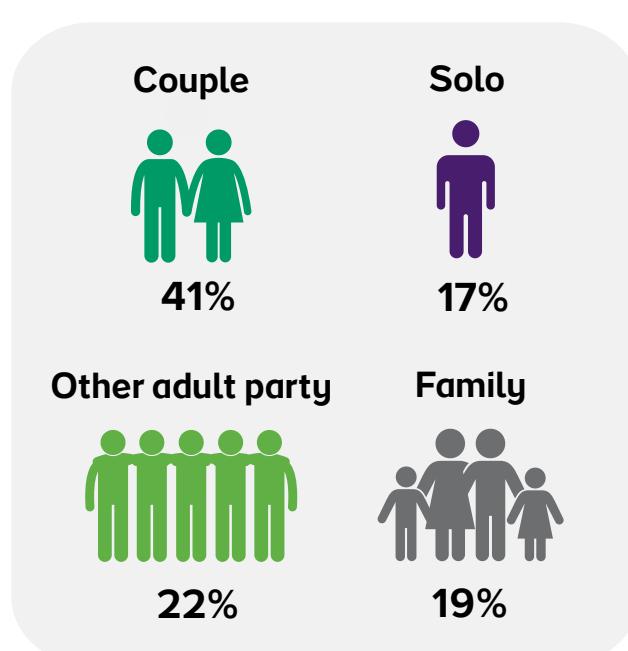
Over half (54%) of British holidaymakers had previously visited while 7% were born on the island of Ireland.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Two-fifths (41%) of British holidaymakers visited the island of Ireland with their partner/spouse.

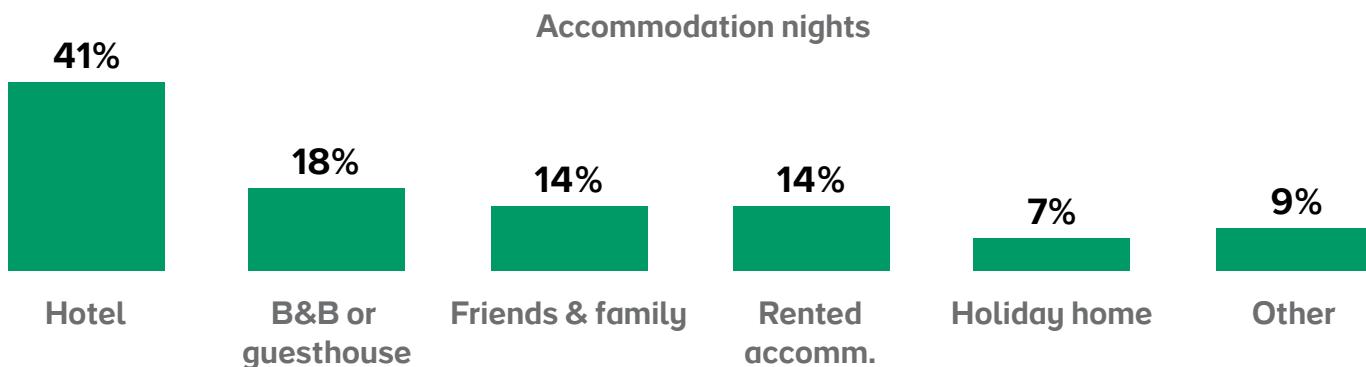
One-in-five (22%) travelled with other adults.



INBOUND HOLIDAYMAKERS

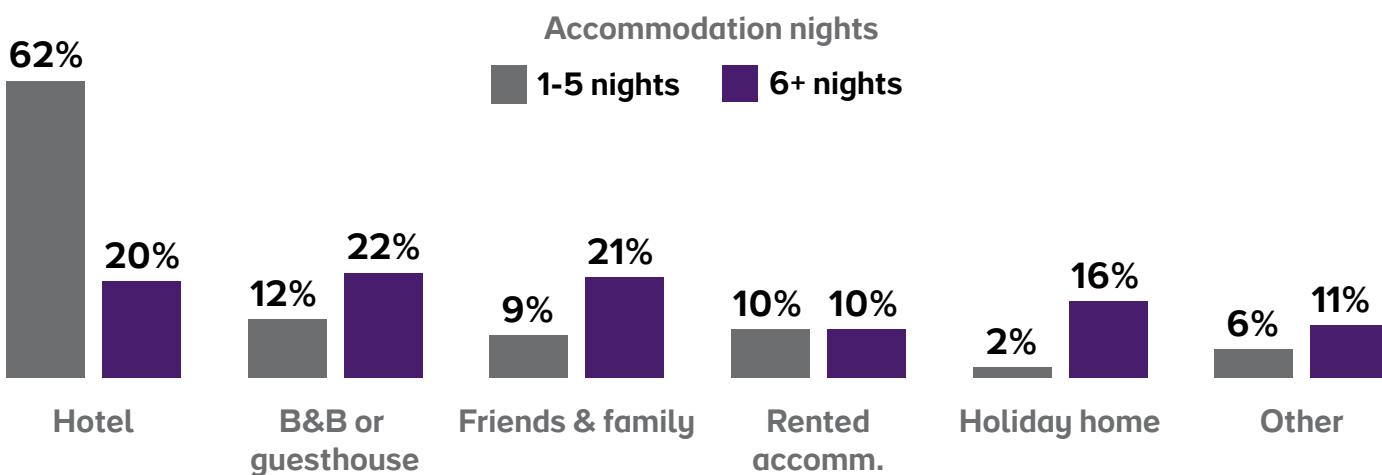
WHERE DID OUR HOLIDAYMAKERS STAY?

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.



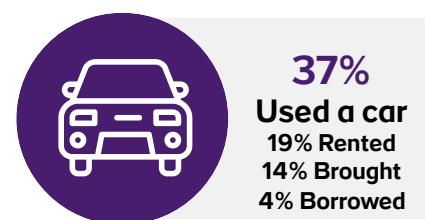
HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?

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.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

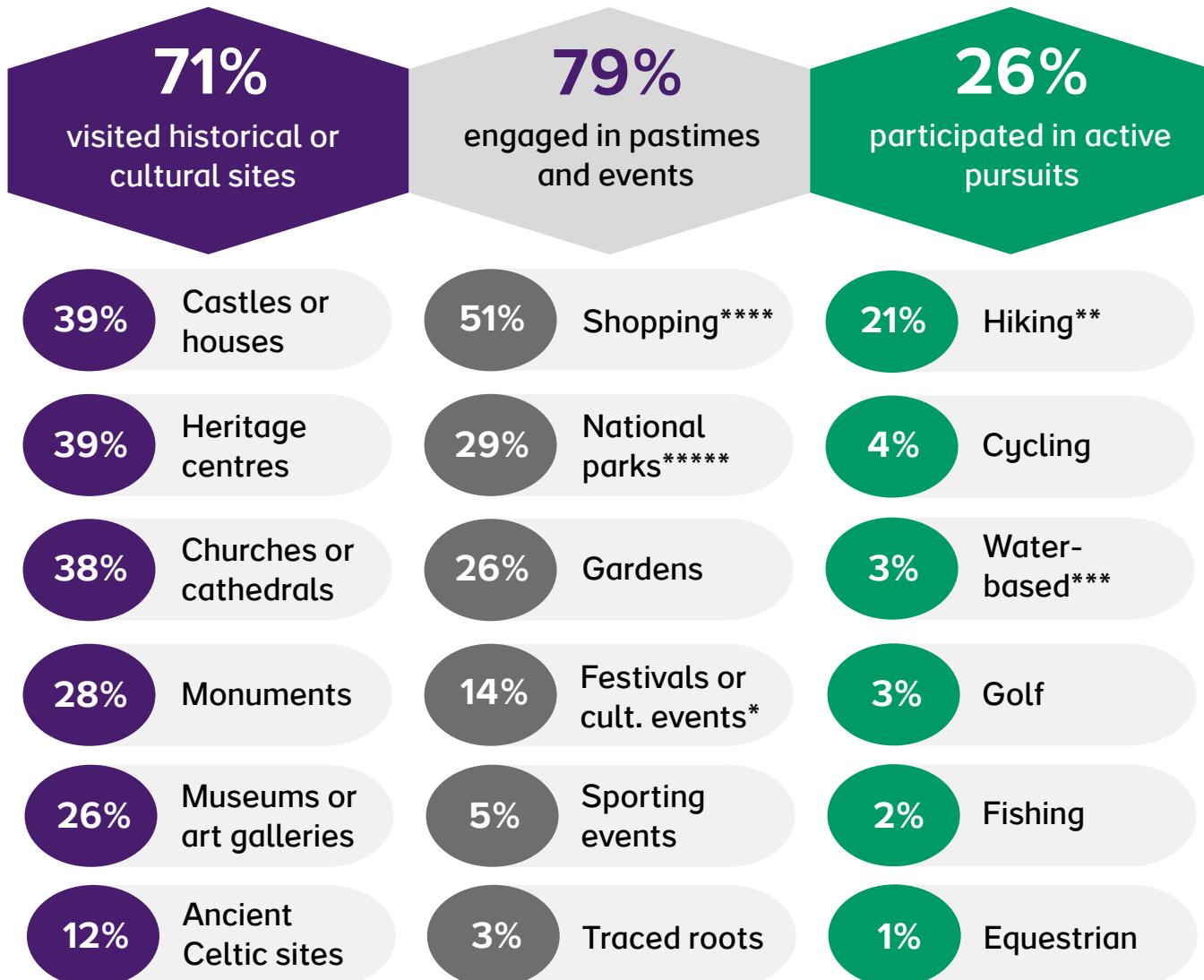
The majority (95%) of British holidaymakers travelled independently and over a third (37%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

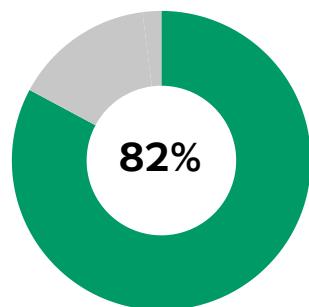
British holidaymakers are engaged tourists. They explored our historical sites and engaged in multiple pastimes while on the island of Ireland.



*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

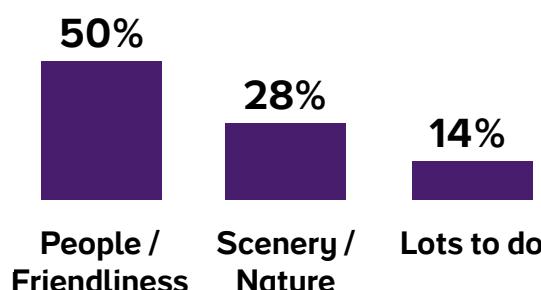
The majority (82%) of British holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (50%), our scenery and nature (28%) and there's lots to see and do (14%).



Promoters (9 - 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

Promoters - Top 3 reasons



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

DREAMING



55% family and friends' recommendations



39% online search



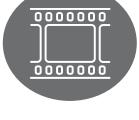
26% films, TV shows, travel shows



26% travel websites*



25% social media



24% travel articles e.g. magazines, websites



14% destination website

RESEARCH AND PLANNING



62% online search



43% travel websites*



34% family and friends' recommendations



32% destination websites



27% travel articles e.g. magazines, websites



21% social media



17% guidebooks

*Travel websites include company websites and booking platforms

ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



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

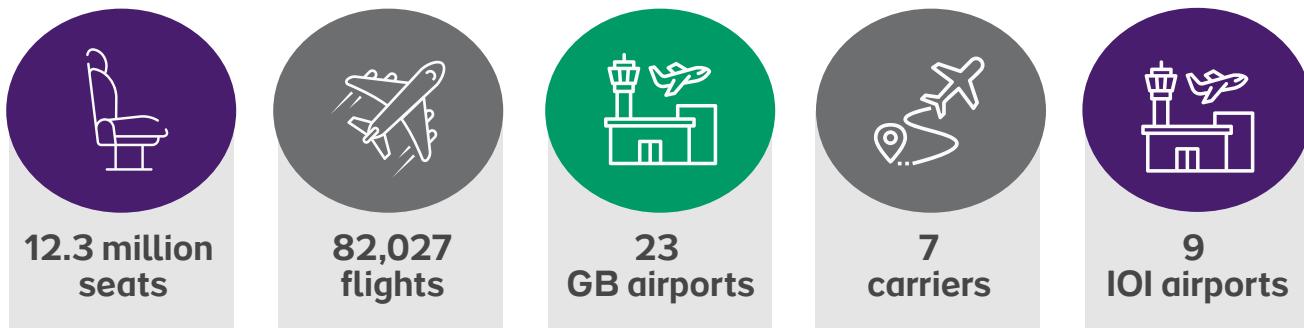
| | | | | | |
|---|---|--|----|---|---|
| 1 |  | To feel connected to nature | 6 |  | To experience living like a local |
| 2 |  | To broaden and stimulate my mind | 7 |  | To enjoy authentic moments with friendly locals |
| 3 |  | To feel the character of the place and people | 8 |  | To be transported 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 |

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

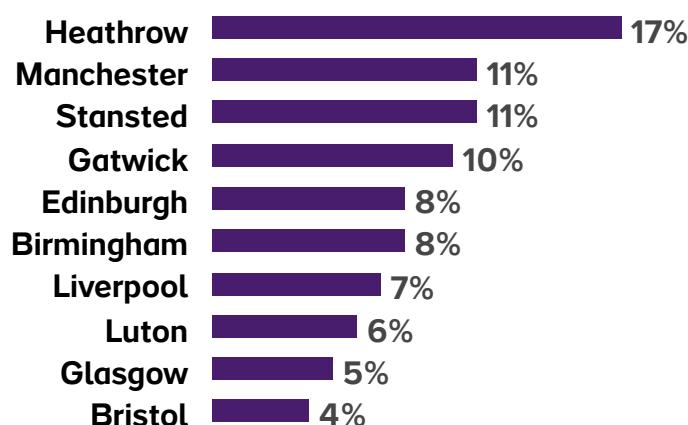
There were 12.3 million direct one-way air seats available on over 82,000 flights from 26 gateways in Great Britain to the island of Ireland in 2024.



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).

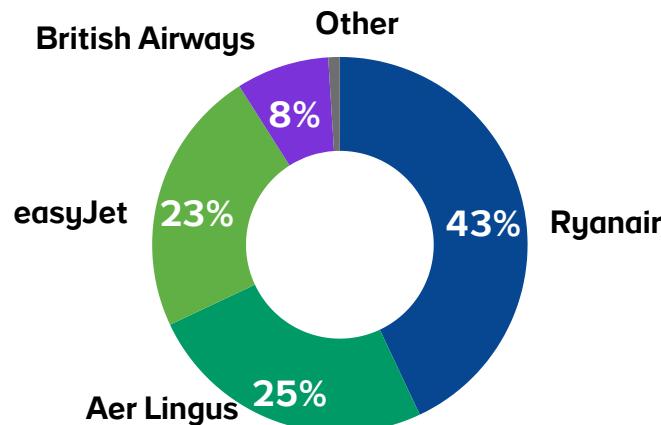
Share of seats by airport (Top 10)



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%).

Share of seats by carrier



ACCESS BY SEA

