

# Germany Market Profile 2024

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## Inbound Tourists

The island of Ireland welcomed more than 480,000 German tourists who spent over €464 million / £403 million and stayed 3.8 million nights. This makes Germany the island's third largest source of overseas revenue, tourists and nights.

Metric	Value	Global Rank
Revenue	€464 million / £403 million	3rd
Trips	480 thousand	3rd
Nights	3.8 million	3rd

### Where did our tourists come from?

Around two-thirds (68%) of German tourists came from six regions (Nordrhein-Westfalen, Bavaria, Berlin, Hessen, Baden-Württemberg and Niedersachsen).

Region	Share of trips
Nordrhein-Westfalen	26%
Berlin	9%
Bavaria	9%
Hessen	10%
Baden-Württemberg	6%
Niedersachsen	7%
Other	32%

### Where did our tourists visit?

Country	Trips
Ireland	468,000
Northern Ireland	39,000

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

### When did our tourists visit?

Around six-in-ten (62%) German tourists visited the island of Ireland during Q2 and Q3 (April to September).

Quarter	Share of visits
Quarter 1	18%
Quarter 2	28%
Quarter 3	34%
Quarter 4	21%

## What were our tourists' reasons for visiting?

Over half (53%) of German tourists visiting the island of Ireland in 2024 were holidaymakers, accounting for 58% of German tourism revenue. A quarter (23%) were visiting friends and/or relatives (VFR).

Purpose of visit	Revenue	Share of revenue
Holiday	€269 million / £234 million	58%
Visiting friends / relatives	€55 million / £48 million	12%
Business	€77 million / £67 million	17%
Other	€62 million / £54 million	13%

Purpose of visit	Trips	Share of trips
Holiday	252,000	53%
Visiting friends / relatives	111,000	23%
Business	80,000	17%
Other	39,000	8%

Purpose of visit	Nights	Share of nights
Holiday	1,900,000	50%
Visiting friends / relatives	750,000	20%
Business	428,000	11%
Other	718,000	19%

## How much did our tourists spend and how long did they stay?

On average, German tourists spent €965 / £840 per trip or €123 / £107 per night and stayed 7.9 nights on the island of Ireland in 2024.

Region	Metric	Value
Island of Ireland	Average spend per trip	€965 / £840
Island of Ireland	Average spend per night	€123 / £107
Island of Ireland	Average length of stay	7.9 nights
Northern Ireland	Average spend per trip	£299
Northern Ireland	Average spend per night	£71
Northern Ireland	Average length of stay	4.2 nights

## How did our tourists spend their money?

Around three-eights (35%) of German tourists' revenue was spent on accommodation and a third (33%) was spent on food and drink.

Category	Share of spend
Accommodation	35%
Food & Drink	33%
Transport	11%
Shopping	13%
Entertainment	7%
Miscellaneous	1%

## How long did our tourists stay?

Two-thirds (66%) stayed four or more nights on the island of Ireland.

Length of stay	Share of trips
1-3 nights	34%
4-5 nights	26%
6-8 nights	18%
9+ nights	21%

# Regionality: Inbound Tourists and Holidaymakers

## Definitions

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

## What areas did our tourists and holidaymakers visit?

Dublin, the South-West and the West were the most popular regions for both German tourists and holidaymakers.

Over 27,000 German tourists and 21,000 holidaymakers overnighted on both sides of the border.

Region	Share of tourists
Dublin	64%
Midlands / Mid-East	13%
South-East	9%
South-West	19%
Mid-West	9%
West	15%
Border	6%
Northern Ireland	8%

Region	Share of holidaymakers
Dublin	79%
Midlands / Mid-East	10%
South-East	14%
South-West	29%
Mid-West	13%
West	30%
Border	8%
Northern Ireland	12%

## Where did our tourists and holidaymakers visit?

Dublin was a must-visit for the majority of German tourists (64%) and holidaymakers (79%).

Region	Share of tourists
Dublin only	48%
Outside Dublin only	36%
Both Dublin and outside Dublin	16%

Region	Share of holidaymakers
Dublin only	44%
Outside Dublin only	21%
Both Dublin and outside Dublin	35%

## Inbound Holidaymakers

Germany was the Island of Ireland's third-largest source of holiday nights, holiday revenue and holidaymakers. German holidaymakers stayed an average of 7.4 nights on the Island of Ireland. Those who visited Northern Ireland stayed an average of 3.5 nights there.

Metric	Value	Global Rank
Revenue	€269 million / £234 million	3rd
Trips	252 thousand	3rd
Nights	1.9 million	3rd

Region	Metric	Value
Island of Ireland	Average spend per trip	€1,067 / £929
Island of Ireland	Average spend per night	€143 / £125
Island of Ireland	Average length of stay	7.4 nights
Northern Ireland	Average spend per trip	£274
Northern Ireland	Average spend per night	£79
Northern Ireland	Average length of stay	3.5 nights

## When did our holidaymakers visit?

Around two-thirds (68%) of German holidaymakers visited during Q2 and Q3 (April - September).

Quarter	Share of visits
Quarter 1	15%
Quarter 2	27%
Quarter 3	41%
Quarter 4	17%

## How long did our holidaymakers stay?

The majority (73%) of German holidaymakers stayed four or more nights on the Island of Ireland.

Length of stay	Share of trips
1-3 nights	27%
4-5 nights	23%
6-8 nights	22%
9+ nights	28%

## What age were our holidaymakers?

Almost half (46%) of German holidaymakers were 35 years old or younger.

Age	Share of trips
<25 years	17%
25-34 years	29%
35-44 years	12%
45-54 years	20%
55-64 years	17%
65+ years	5%

## Holidaymaker gender and dependent children

Around four-in-seven (56%) of German holidaymakers were female. An eighth (12%) of German holidaymakers had dependent children in the home (whether empty nesters or pre-children).

Gender	Share of trips
Female	56%
Male	44%

## Had our holidaymakers been here before?

It was a first visit for around two-thirds (62%) of German holidaymakers.

Visitor type	Share of trips
First visit	62%
Repeat visit	38%
Born in Ireland	1%

## Who did our holidaymakers travel with?

Almost half (45%) of German holidaymakers visited with their partner/spouse. One-in-five (20%) visited alone.

Party composition	Share of trips
Solo	20%
Couple	45%
Family	15%
Other adult party	20%

## Where did our holidaymakers stay?

The majority (66%) of nights stayed by German holidaymakers were in hotels (37%) and B&Bs or guesthouses (29%).

Accommodation type	Share of nights
Hotel	37%
Guesthouse / B&B	29%
Caravan / camping	11%
Rented accommodation	7%
Friends / family	4%
Other	12%

## How did length of stay affect accommodation type?

Hotels (60%) are especially popular among German holidaymakers on short breaks (1-5 nights), while B&Bs or guesthouses (32%) were more popular than hotels (30%) for those staying 6+ nights.

Accommodation type	Trip length	Share of nights
Hotel	5 nights or shorter	60%
Hotel	6 nights or longer	30%
Guesthouse / B&B	5 nights or shorter	20%
Guesthouse / B&B	6 nights or longer	32%
Caravan / camping	5 nights or shorter	0%
Caravan / camping	6 nights or longer	14%
Rented accommodation	5 nights or shorter	6%
Rented accommodation	6 nights or longer	8%
Friends / family	5 nights or shorter	2%
Friends / family	6 nights or longer	4%
Other	5 nights or shorter	11%
Other	6 nights or longer	13%

## How did our holidaymakers travel and get around

The majority (93%) of German holidaymakers travelled independently, 7% travelled as part of a package, and around two-fifths (38%) used a car while on the island of Ireland.

Car use	Share of trips
Hired a car	30%
Brought own car	8%
Borrowed a car	1%
Did not use a car	62%

## What were our holidaymakers' interest and activities?

German holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.

91% visited historical or cultural sites.

Type of activity	Share of trips
Castles or houses	65%
Heritage centres	64%
Churches or cathedrals	63%
Monuments	53%
Museums or art galleries	47%
Ancient Celtic sites	27%

96% engaged in pastimes and events.

Type of activity	Share of trips
National parks including forests	63%
Shopping excluding food, drink, and souvenirs	58%
Gardens	53%
Festivals or cultural events including concerts	16%
Sporting events	4%
Traced roots	2%

59% participated in active pursuits.

Type of activity	Share of trips
Hiking including cross-country walking	55%
Water-based activities excluding fishing and swimming	5%
Cycling	4%
Golf	2%
Fishing	1%
Equestrian	1%

## **Likelihood to recommend a holiday in Ireland to others**

The majority (83%) of German holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the scenery and nature (61%), friendly people (53%) and our pub culture (13%).

# Outbound holidaymakers

## Sources of inspiration, research and planning

Outbound holidaymakers from Germany use multiple sources of inspiration when choosing their holiday destination, including family and friends' recommendations, films and TV shows and online search.

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.

Channel	Share of holidaymakers' inspiration
Family and friends' recommendations	40%
Online search	34%
Films, TV shows, travel shows	31%
Destination websites	26%
Travel websites including company websites and booking platforms	25%
Guidebooks	22%
Social media	19%

Channel	Share of holidaymakers' research and planning
Online search	48%
Destination websites	38%
Travel websites including company websites and booking platforms	34%
Family and friends' recommendations	31%
Guidebooks	30%
Travel articles, e.g. magazines, websites	19%
Social media	19%

## **Enrichment Explorers**

Our target segment makes up 26% of all German 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 simulate their 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**

Germany was the world's second-largest outbound market in 2024 and 90% of all outbound trips from Germany were to other parts of Europe.

## Access by air

There were 1.2 million direct one-way air seats available on 6,930 flights from Germany to the island of Ireland in 2024. There were 8 gateways from Germany operated by 4 carriers to 5 airports on the island of Ireland

### Where can our tourists fly from?

The top five German airports accounted for the majority (91%) of seats in 2024. Frankfurt International accounted for three-in-ten (30%) seats.

Airports in Germany	Share of seats
Frankfurt International	30%
Berlin Brandenburg	20%
Munich International	19%
Düsseldorf International	12%
Hamburg Airport	10%
Frankfurt-Hahn	4%
Cologne/Bonn	3%
Memmingen	2%

### Who can our tourists fly with?

Four carriers operated between Germany and the island of Ireland. In 2024, Aer Lingus was responsible for delivering around two-in-five (40%) seats to the island of Ireland.

Carrier	Share of seats
Aer Lingus	40%
Lufthansa	32%
Ryanair	25%
Eurowings	3%