

GERMANY

MARKET PROFILE

2024



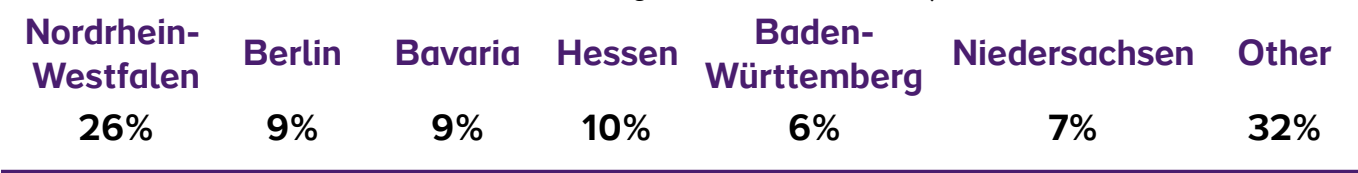
INBOUND TOURISTS

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



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).



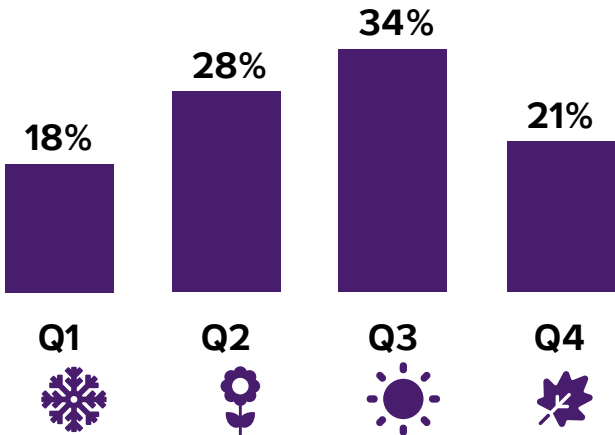
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?





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



INBOUND TOURISTS


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).

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€269/£234m	58%	252k	53%	1.9m	50%
 VFR	€55/£48m	12%	111k	23%	750k	20%
 BUSINESS	€77/£67m	17%	80k	17%	428k	11%
 OTHER	€62/£54m	13%	39k	8%	718k	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.



€965/£840 (IOI)
£299 (NI)

Av. spend per trip



€123/£107 (IOI)
£71 (NI)

Av. spend per night









7.9 (IOI)
4.2 (NI)

Av. stay (nights)

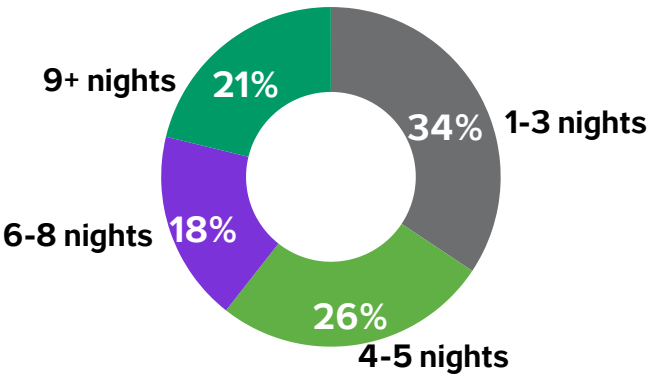
HOW DID OUR TOURISTS SPEND THEIR MONEY?

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

Accomm.  35%	Food & Drink  33%	Transport  11%
Shopping  13%	Entertainment  7%	Misc.  1%

HOW LONG DID OUR TOURISTS STAY?

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



INBOUND TOURISTS AND HOLIDAYMAKERS

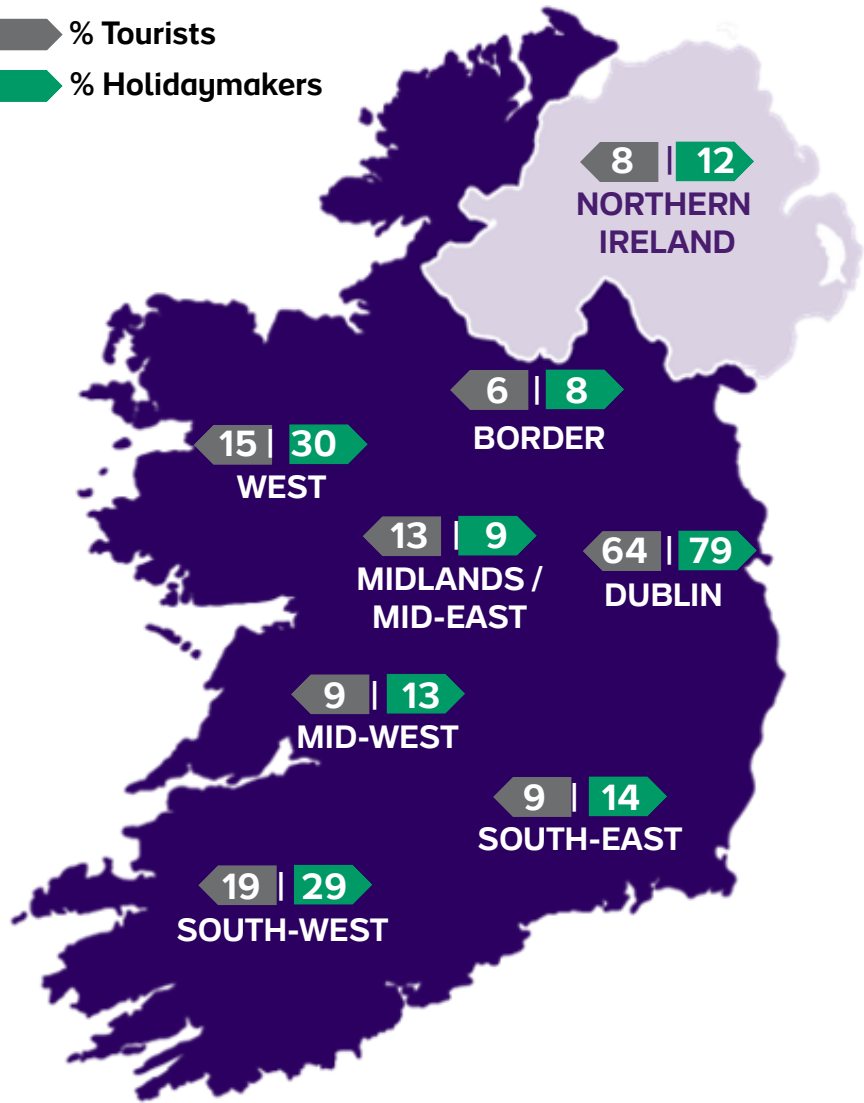
WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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.

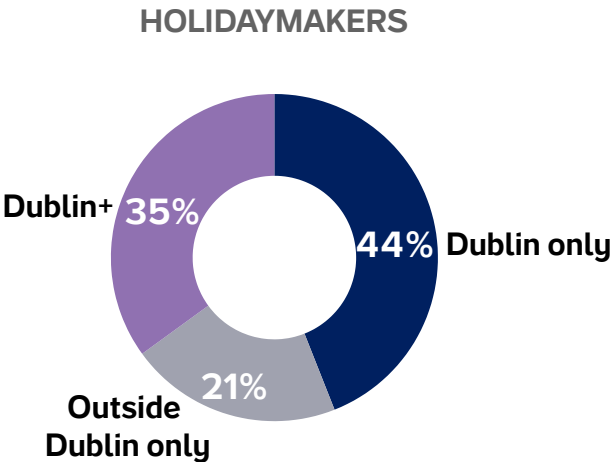
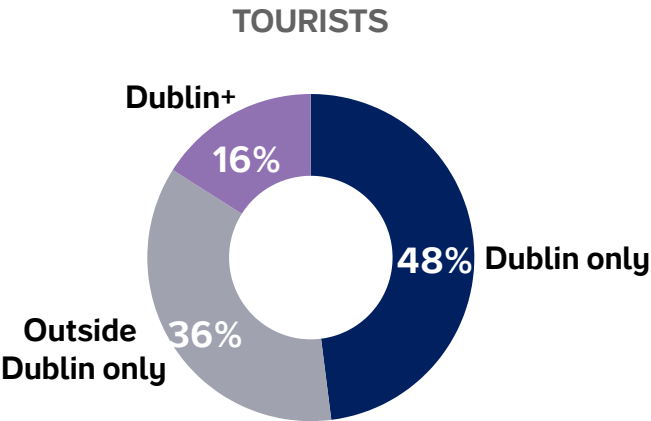
Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	South-West	West
#3	West	South-West

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



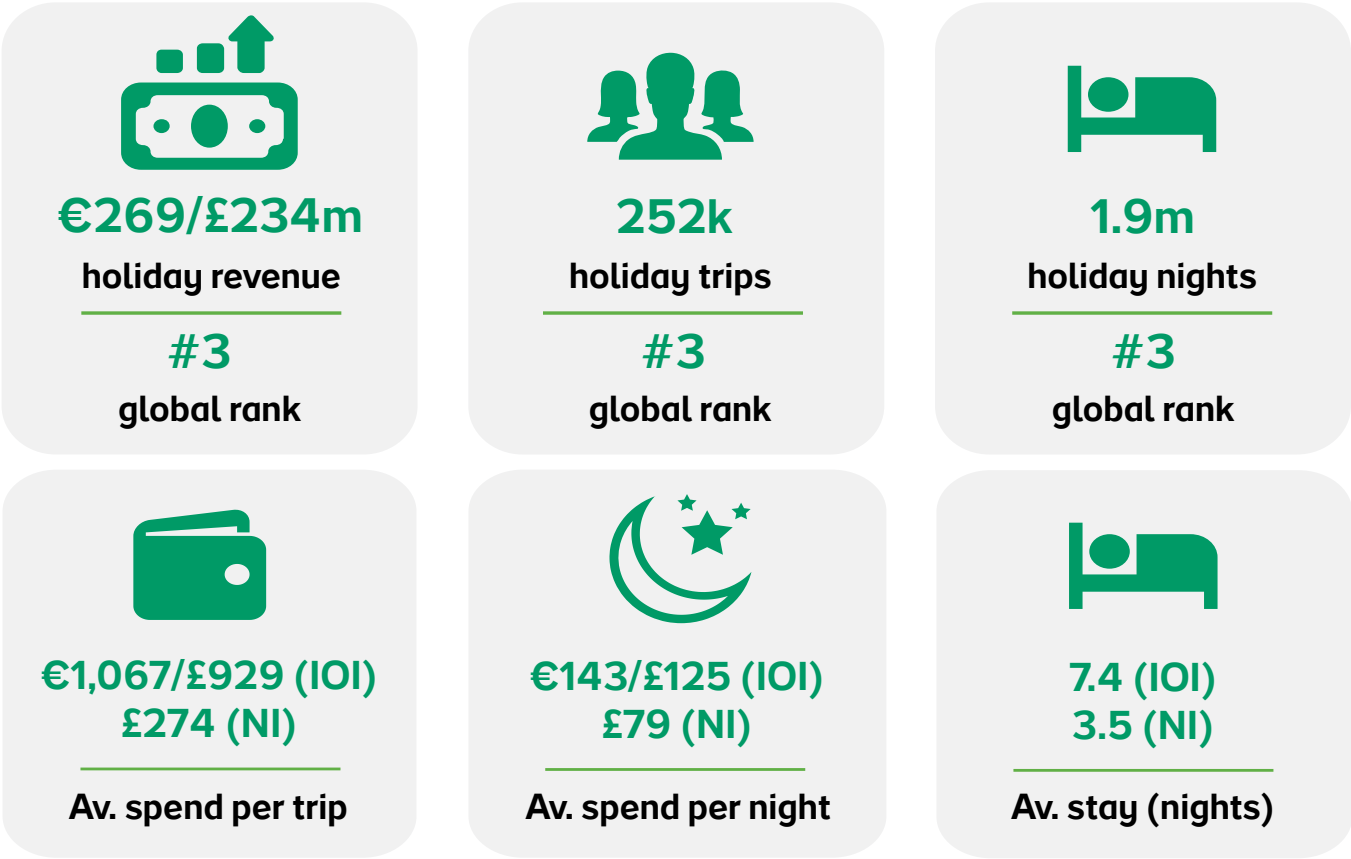
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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



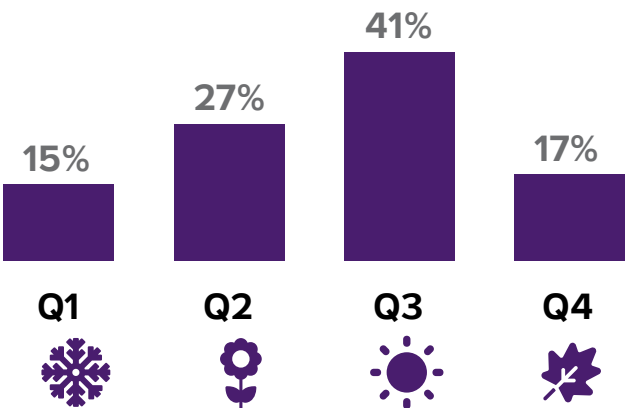
INBOUND HOLIDAYMAKERS

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.



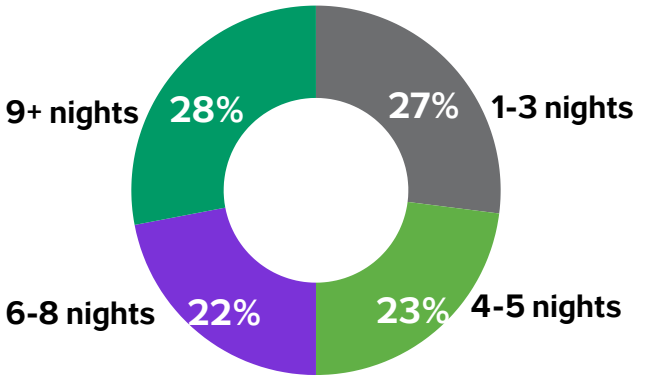
WHEN DID OUR HOLIDAYMAKERS VISIT?

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



HOW LONG DID OUR HOLIDAYMAKERS STAY?

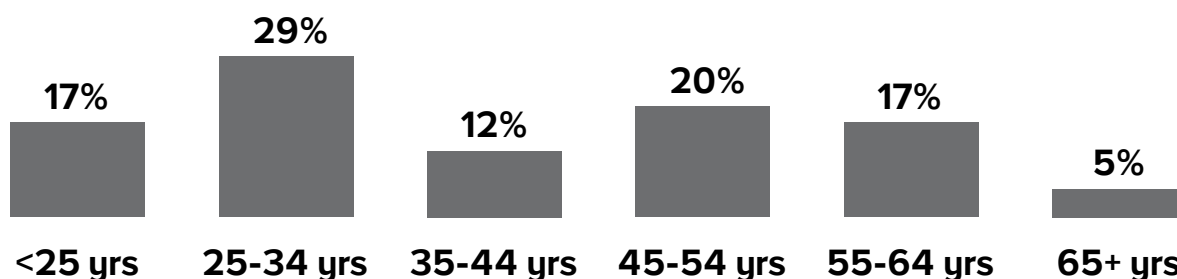
The majority (73%) of German holidaymakers stayed four or more nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

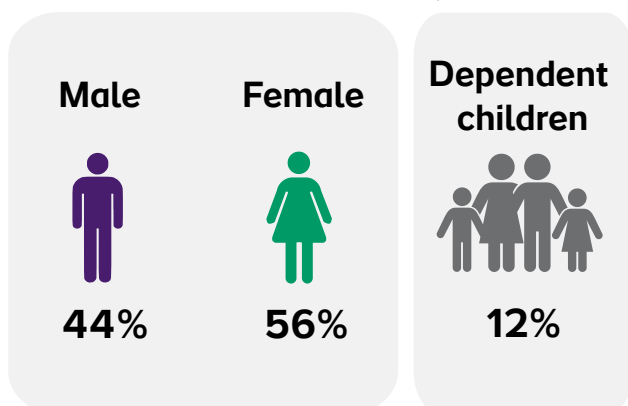
WHAT AGE WERE OUR HOLIDAYMAKERS?

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



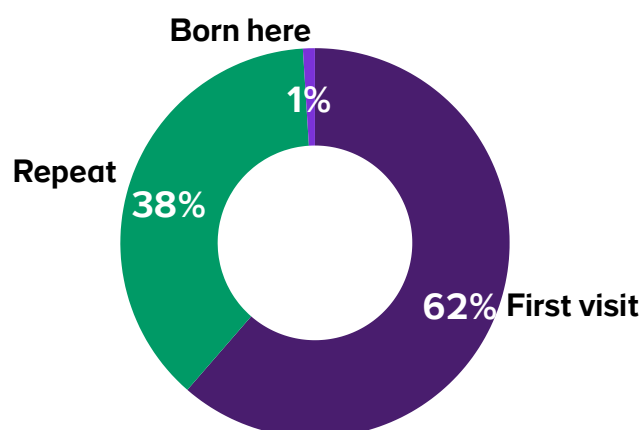
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

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).



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

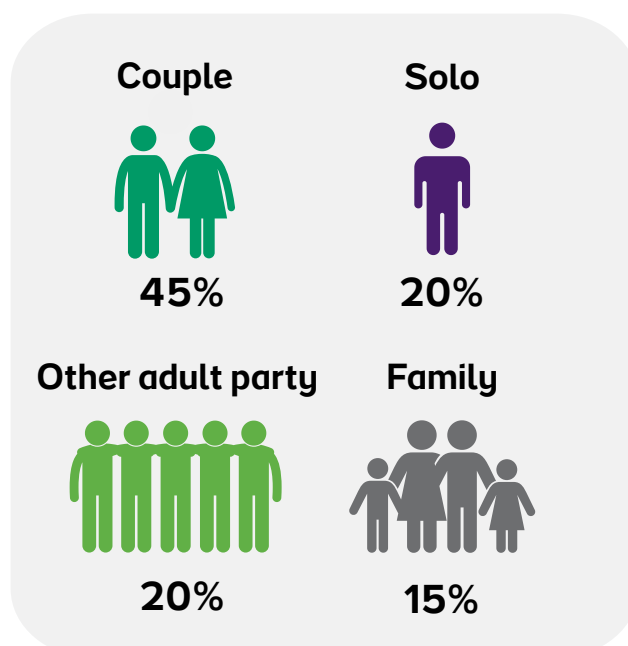
It was a first visit for around two-thirds (62%) of German holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Almost half (45%) of German holidaymakers visited with their partner/spouse.

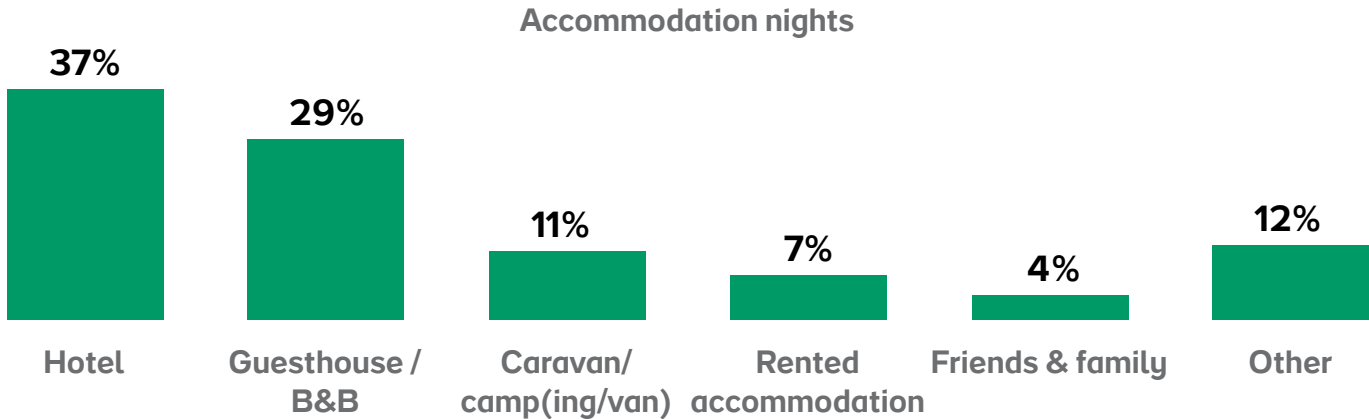
One-in-five (20%) visited alone.



INBOUND HOLIDAYMAKERS

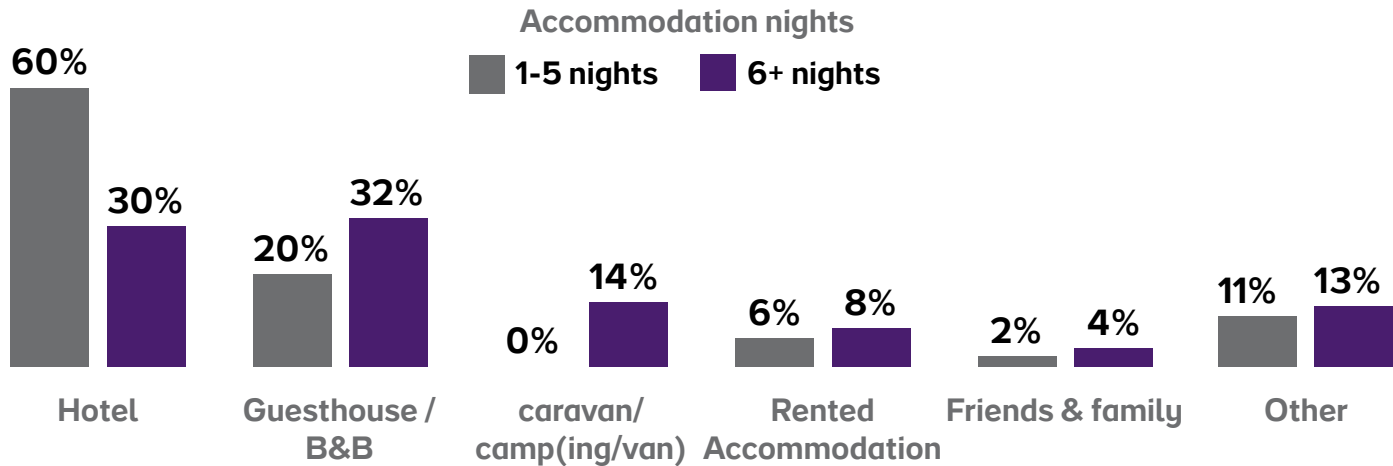
WHERE DID OUR HOLIDAYMAKERS STAY?

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



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.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

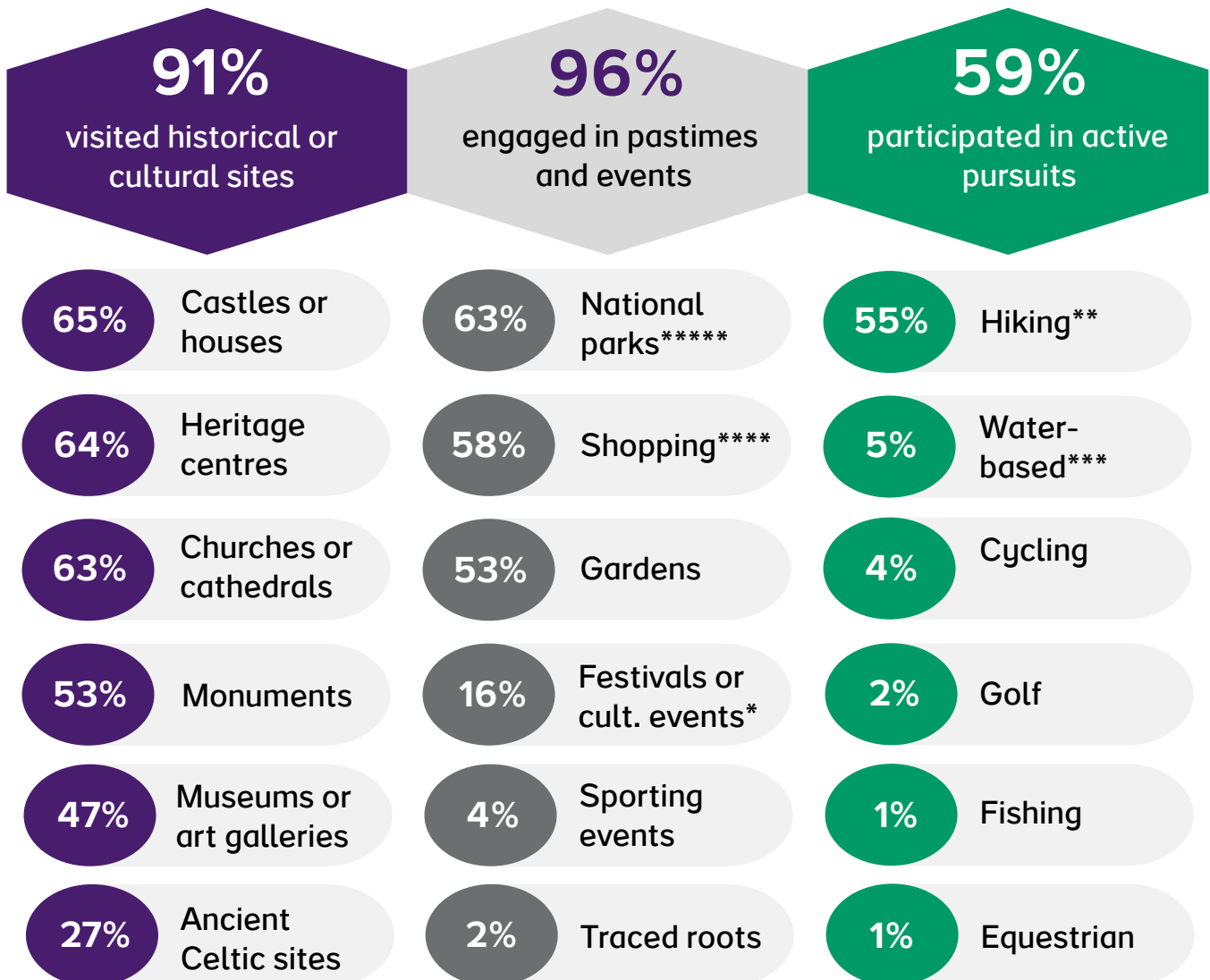
The majority (93%) of German holidaymakers travelled independently and around two-fifths (38%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

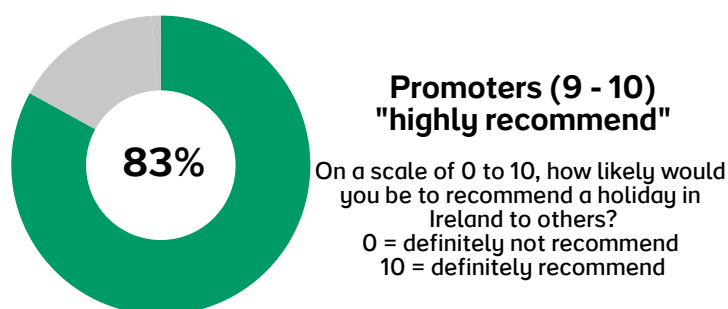
German holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



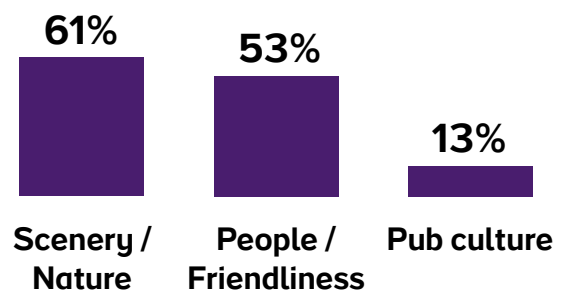
*incl. concerts | **incl. cross country walking | ***excl. fishing and swimming | ****excl. food/drink/souvenirs | *****incl. forests

LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS

The majority (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%).



Promoters - Top 3 reasons



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.

Around 1-in-3 cite films, TV shows and travel shows as a source of inspiration

Half cited online search for the purpose of research and planning

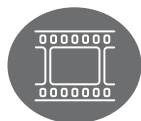
DREAMING



RESEARCH AND PLANNING



40% family and friends' recommendations



34% online search



31% films, TV shows, travel shows



26% destination websites*



25% travel websites*



22% guidebooks



19% social media



48% online search



38% destination websites



34% travel websites*



31% family and friends' recommendations



30% guidebooks



19% travel articles e.g. magazines, websites



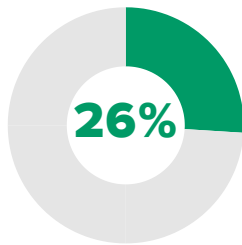
19% social media

*Travel websites include company websites and booking platforms

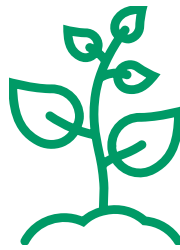


ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



of 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

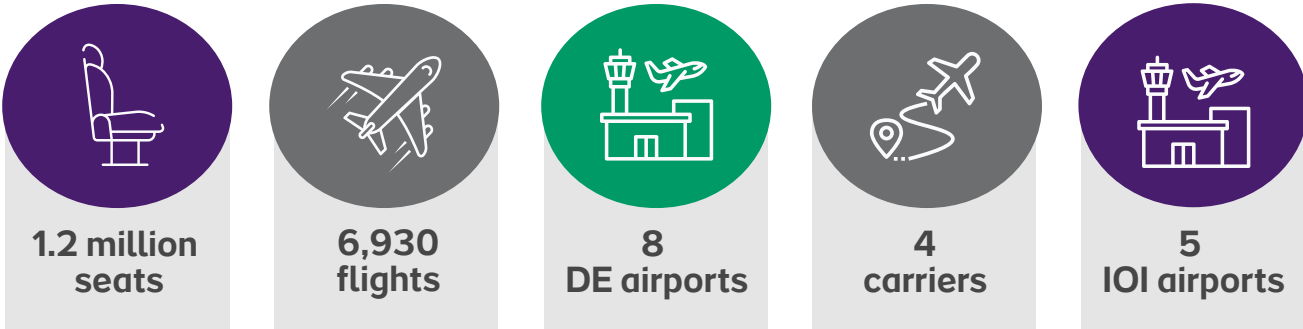
- | | | | | | |
|---|---|--|----|---|---|
| 1 |  | To feel connected to nature | 6 |  | To experience living like a local |
| 2 |  | To broaden and stimulate my mind | 7 |  | To enjoy authentic moments with friendly locals |
| 3 |  | To feel the character of the place and people | 8 |  | To be transported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

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 almost 7,000 flights from Germany to the island of Ireland in 2024. There were 8 gateways from Germany to airports on the island of Ireland.



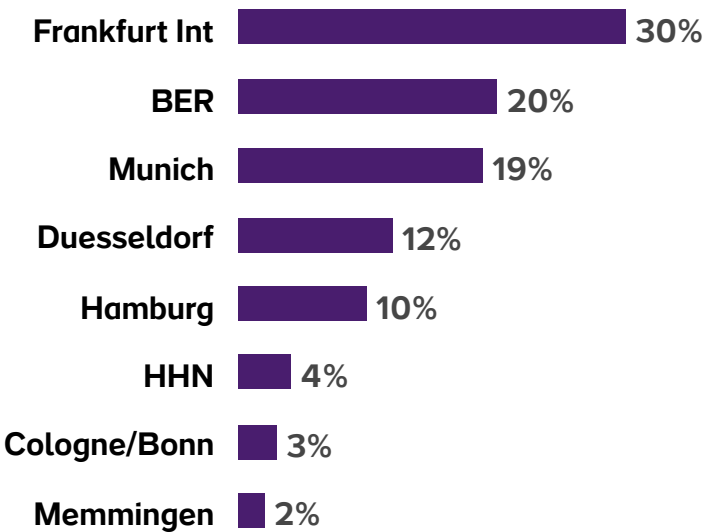
WHERE CAN OUR TOURISTS FLY FROM?

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

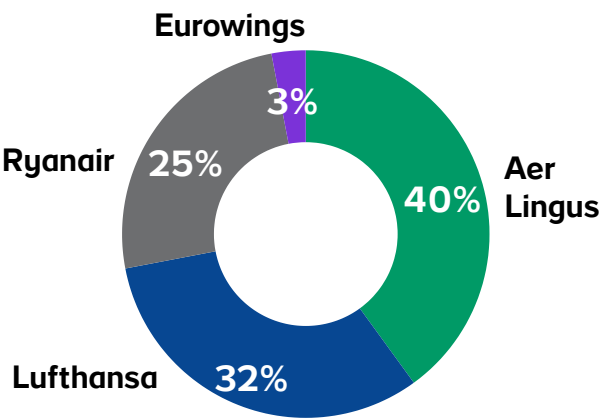
WHO CAN OUR TOURISTS FLY WITH?

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.

Share of seats by airports



Share of seats by carrier



FRA: Frankfurt International, BER: Berlin Brandenburg, MUC: Munich International, DUS: Duesseldorf International, HAM: Hamburg Airport, HHN: Frankfurt Hahn, CGN: Cologne/Bonn, FMM: Memmingen, NUE: Nuremberg, LEJ: Leipzig/Halle