

# GERMANY

## MARKET PROFILE 2025



### INBOUND TOURISTS

The island of Ireland welcomed 445,000 German tourists who spent €413/£359 million and stayed 3.5 million nights in 2025. This makes Germany the island's third-largest source of overseas revenue, tourists and nights.

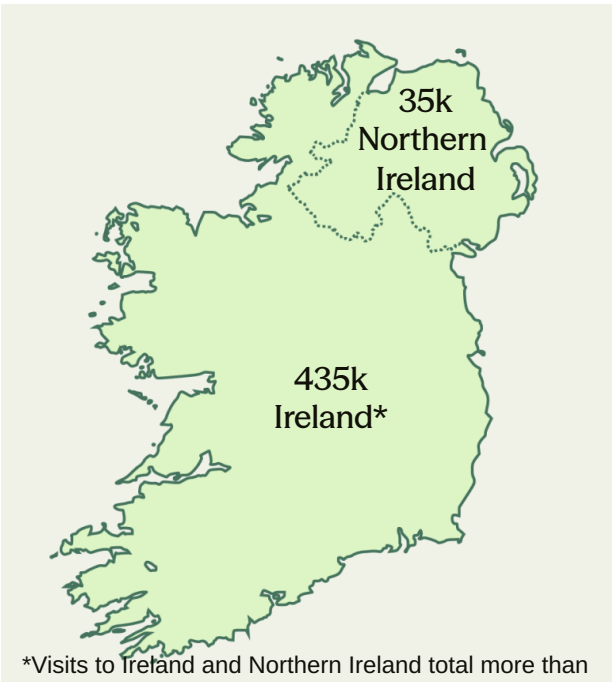


### WHERE DID OUR TOURISTS COME FROM?

German demand is broadly spread across the country, led by Nordrhein-Westfalen (23%) but with significant contributions from many regions, highlighting the importance of maintaining broad geographic reach across the German market.

| Nordrhein- |        |         |        | Baden-      |               |  | Other |
|------------|--------|---------|--------|-------------|---------------|--|-------|
| Westfalen  | Hessen | Bavaria | Berlin | Württemberg | Niedersachsen |  |       |
| 23%        | 12%    | 11%     | 8%     | 7%          | 6%            |  | 33%   |

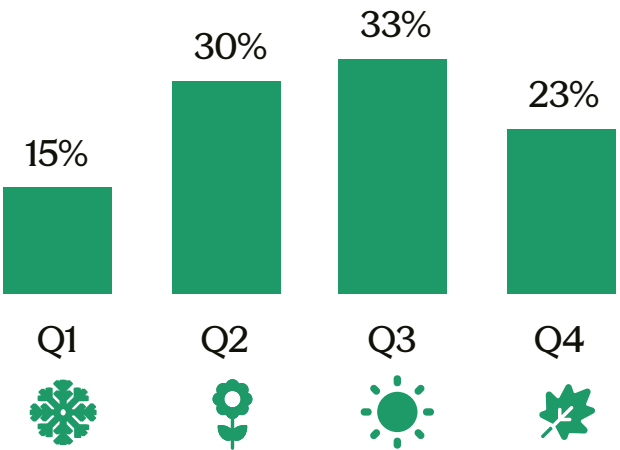
### WHERE DID OUR TOURISTS VISIT?



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

### WHEN DID OUR TOURISTS VISIT?

German visitor demand was relatively well spread across the year in 2025. Q3 accounted for the largest share of trips (33%), while more than one-third (38%) of visits took place between October and March.



# INBOUND TOURISTS

## WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Holidaymakers generated 57% of German tourism revenue and made up 51% of German tourists. Just under one-quarter (22%) were visiting friends and/or relatives (VFR).

|                                                                                   |          | REVENUE    | SHARE | TRIPS | SHARE | NIGHTS | SHARE |
|-----------------------------------------------------------------------------------|----------|------------|-------|-------|-------|--------|-------|
|  | HOLIDAY  | €236/£205m | 57%   | 226k  | 51%   | 1.7m   | 50%   |
|  | VFR      | €56/£49m   | 14%   | 99k   | 22%   | 696k   | 20%   |
|  | BUSINESS | €55/£48m   | 13%   | 81k   | 18%   | 350k   | 10%   |
|  | OTHER    | €65/£57m   | 16%   | 42k   | 10%   | 681k   | 20%   |

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

On average, German tourists spent €929/£808 per trip or €119/£104 per night and stayed 7.8 nights on the island of Ireland in 2025.



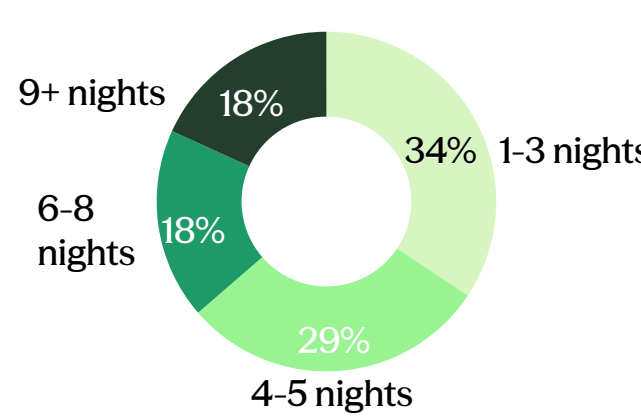
## HOW DID OUR TOURISTS SPEND THEIR MONEY?

Accommodation (35%) and food or drink (34%) accounted for most German tourists' spend (69%).

|                                                                                                         |                                                                                                            |                                                                                                        |
|---------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| Accomm.<br><br>35%   | Food & drink<br><br>34% | Shopping<br><br>14% |
| Transport<br><br>10% | Entertainment<br><br>7% | Misc.<br><br>1%     |

## HOW LONG DID OUR TOURISTS STAY?

German visitors tend to favour shorter breaks, with almost two-thirds (63%) staying five nights or fewer.



# INBOUND TOURISTS AND HOLIDAYMAKERS

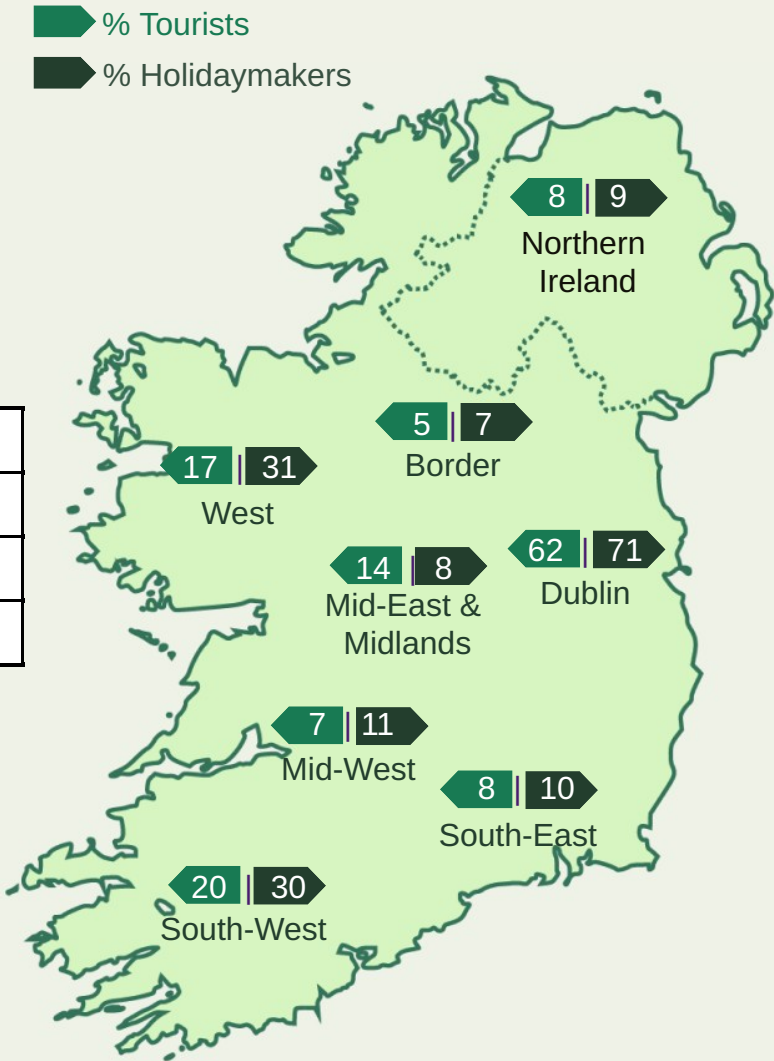
## WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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

Almost 26,000 German tourists and 17,000 holidaymakers overnighted 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

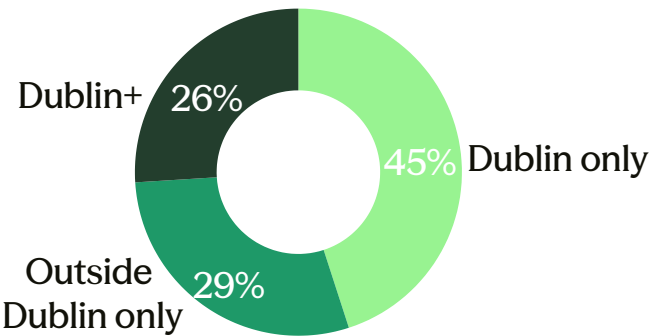
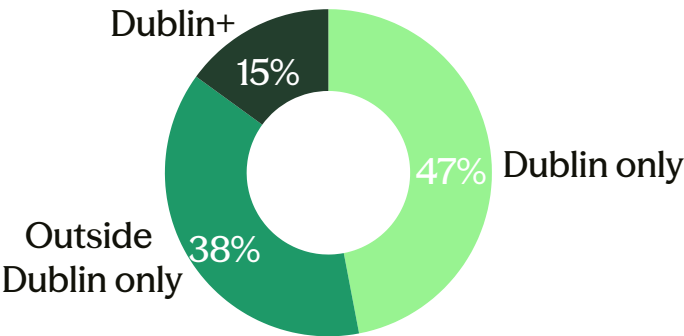


## WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

German visitors demonstrated a good geographic spread across the island of Ireland in 2025. More than half of both tourists (53%) and holidaymakers (55%) visited destinations outside Dublin, either exclusively or as part of a wider itinerary.

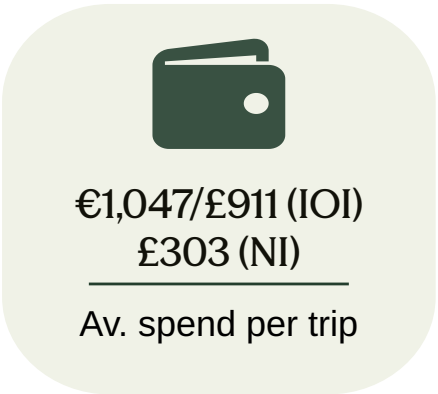
TOURISTS

HOLIDAYMAKERS



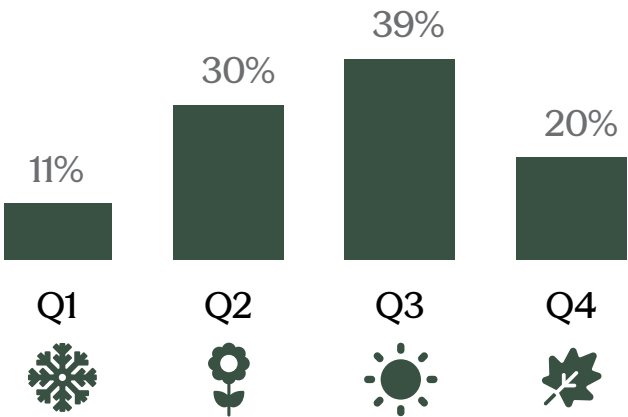
# INBOUND HOLIDAYMAKERS

Germany was the island of Ireland’s third-largest source of holiday revenue, holidaymakers and holiday nights. German holidaymakers stayed an average of 7.7 nights on the island of Ireland. German holidaymakers who visited Northern Ireland stayed 4 nights on average.



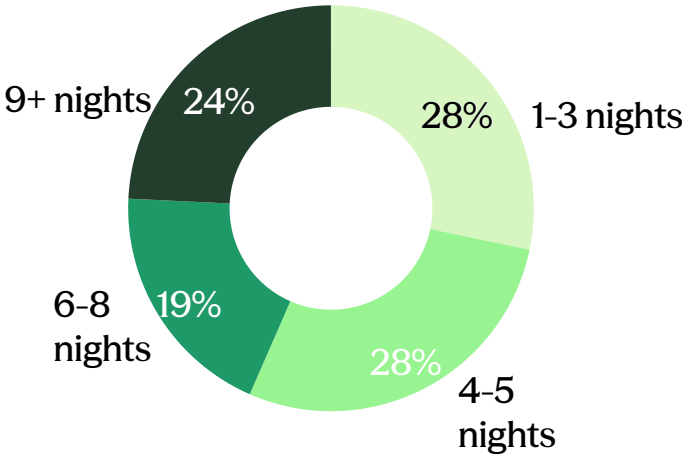
## WHEN DID OUR HOLIDAYMAKERS VISIT?

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



## HOW LONG DID OUR HOLIDAYMAKERS STAY?

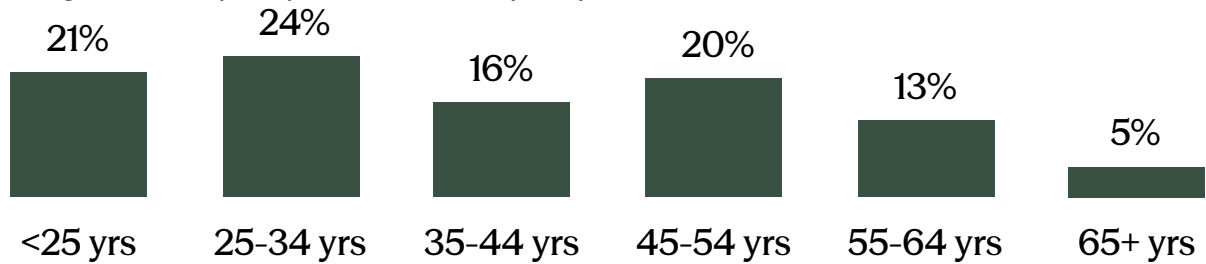
German holidaymakers tended to take shorter stays on the island of Ireland, with over half (56%) staying for up to five nights. However, a significant proportion (43%) stayed for six nights or longer.



# INBOUND HOLIDAYMAKERS

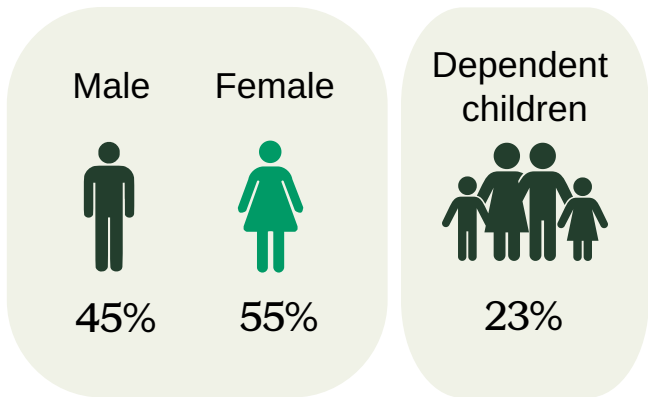
## WHAT AGE WERE OUR HOLIDAYMAKERS?

German holidaymakers represented a broad range of age groups in 2025, with the largest shares aged 25-34 (24%) and under 25 (21%).



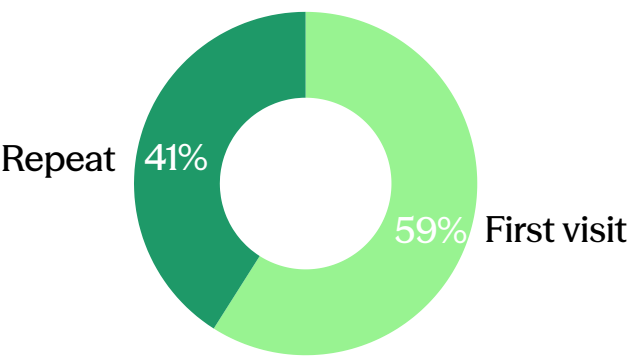
## HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN\*

The profile of German holidaymakers was broadly balanced, with a slight female skew. Around one-quarter (23%) of German holidaymakers had dependent children in the household.



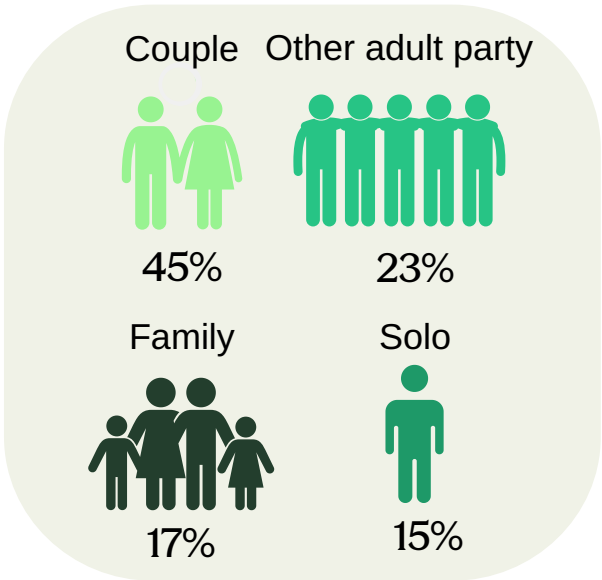
## HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

Two in five German holidaymakers were repeat travellers, the highest repeat rate after Great Britain.



## WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

German holidays were primarily taken by adults, with two-thirds travelling as couples or other adult groups.

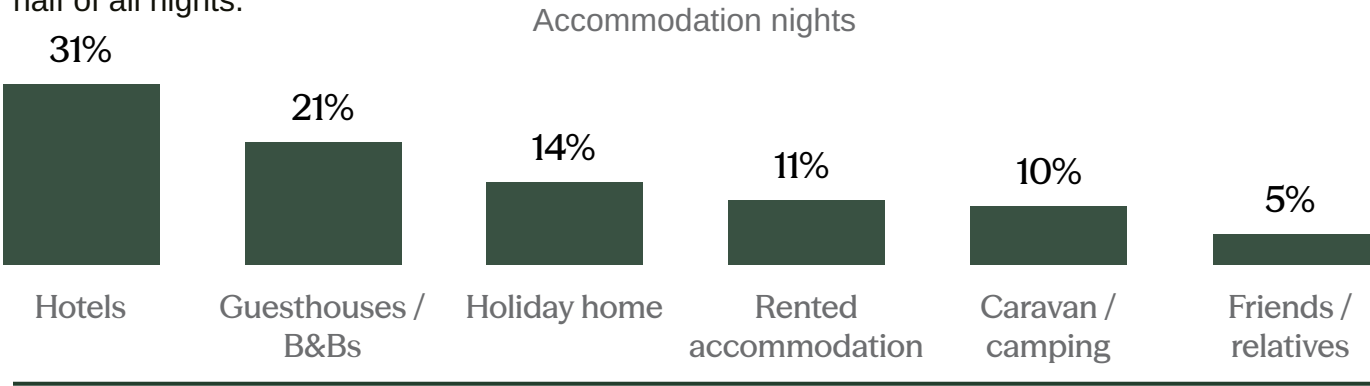


\*Survey of Overseas Travellers only

# INBOUND HOLIDAYMAKERS

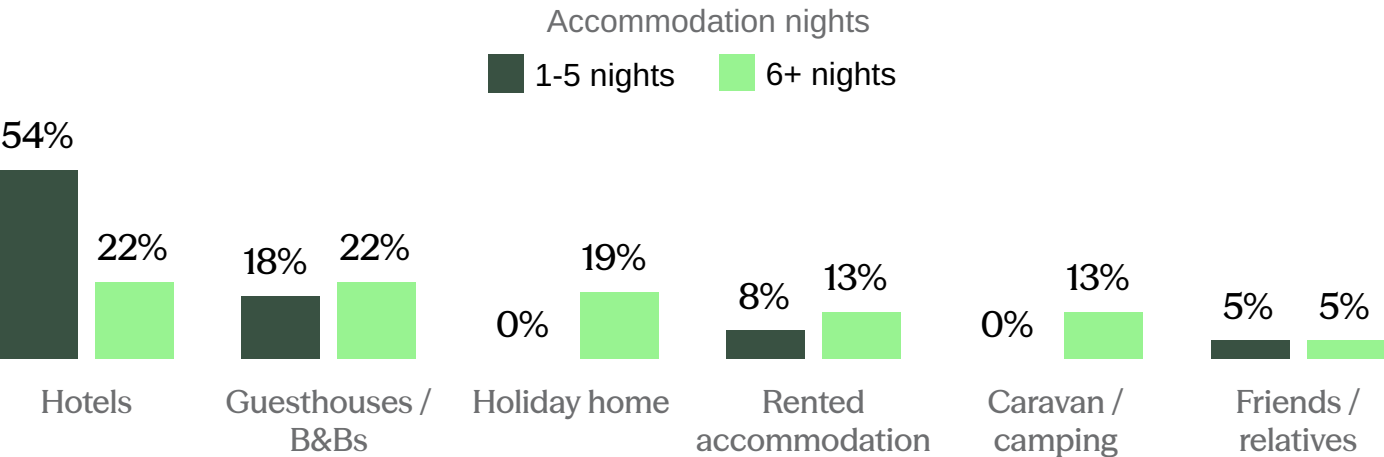
## WHERE DID OUR HOLIDAYMAKERS STAY?

German holidaymakers favoured a varied accommodation mix rather than relying predominantly on hotels. Although hotels represent the largest accommodation type (31%), guesthouses/B&Bs, holiday homes and rented accommodation collectively account for almost half of all nights.



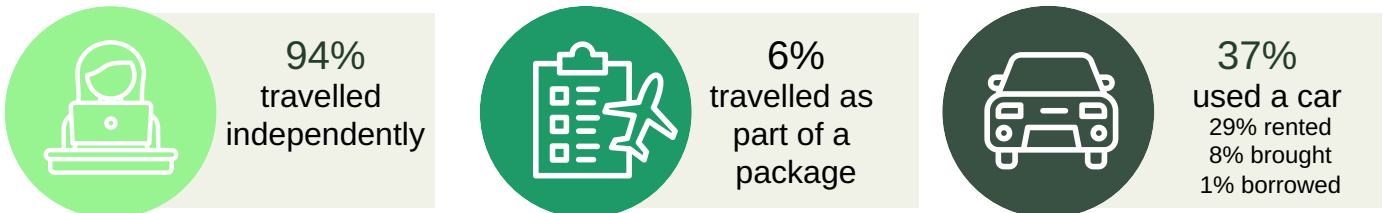
## HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?

German holidaymakers made use of a diverse mix of accommodation types in 2025. Among those staying six nights or more, hotels and guesthouses were equally popular choices.



## HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

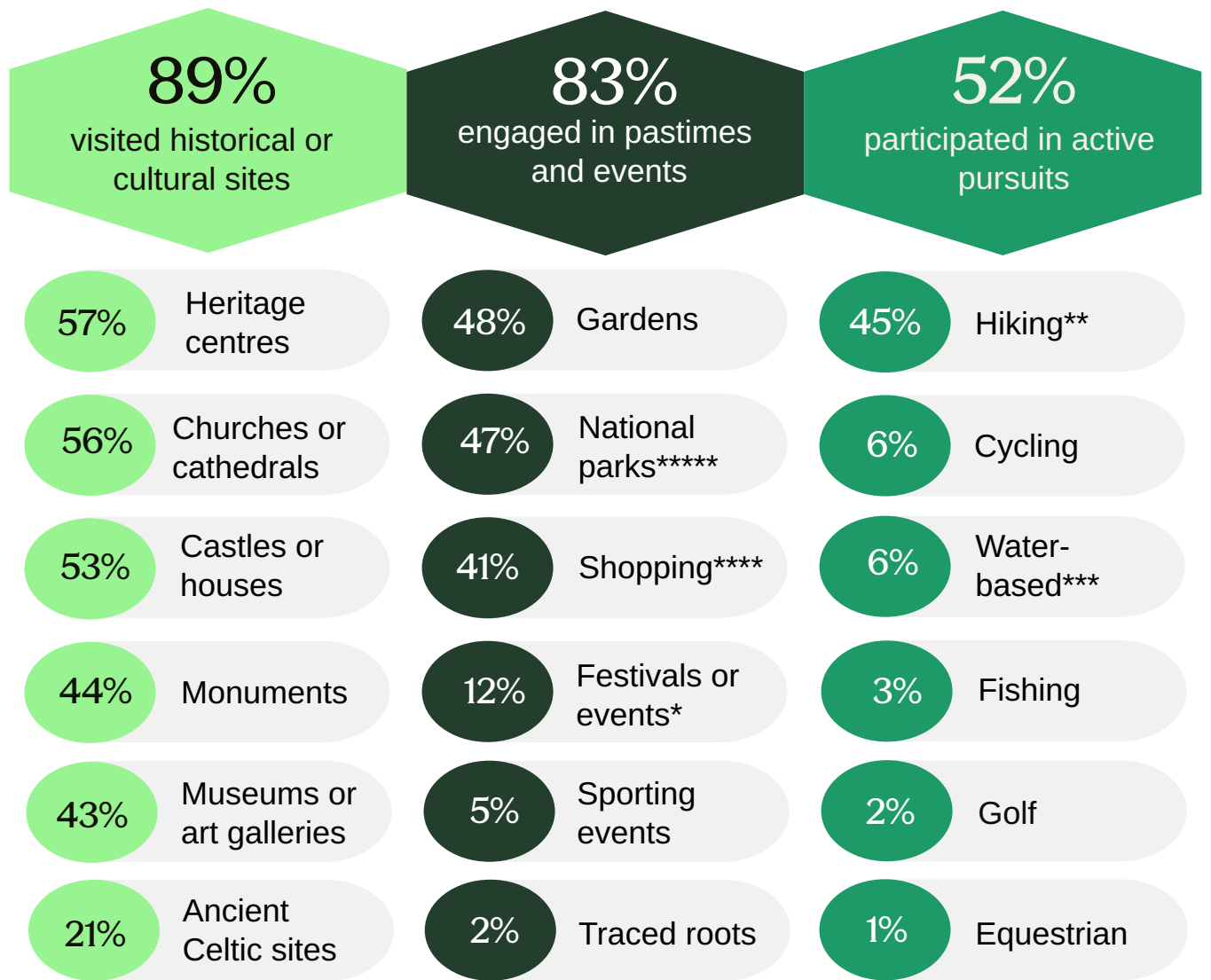
Independent travel dominates among German holidaymakers, with 94% travelling independently. More than one-third (37%) used a car when exploring the island of Ireland.



# INBOUND HOLIDAYMAKERS

## WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

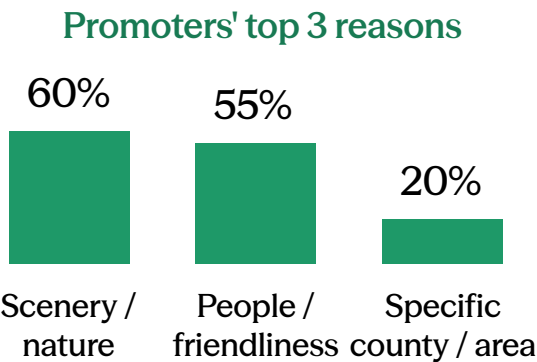
German holidaymakers are engaged tourists. They explored our historical sites and engaged in multiple pastimes while on the island of Ireland.



\*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

Eight in ten German holidaymakers would highly recommend Ireland, inspired by scenery, nature and friendly people.



# OUTBOUND HOLIDAYMAKERS

## SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from Germany 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.

More than one in three cited inspiration from family and friends' recommendations

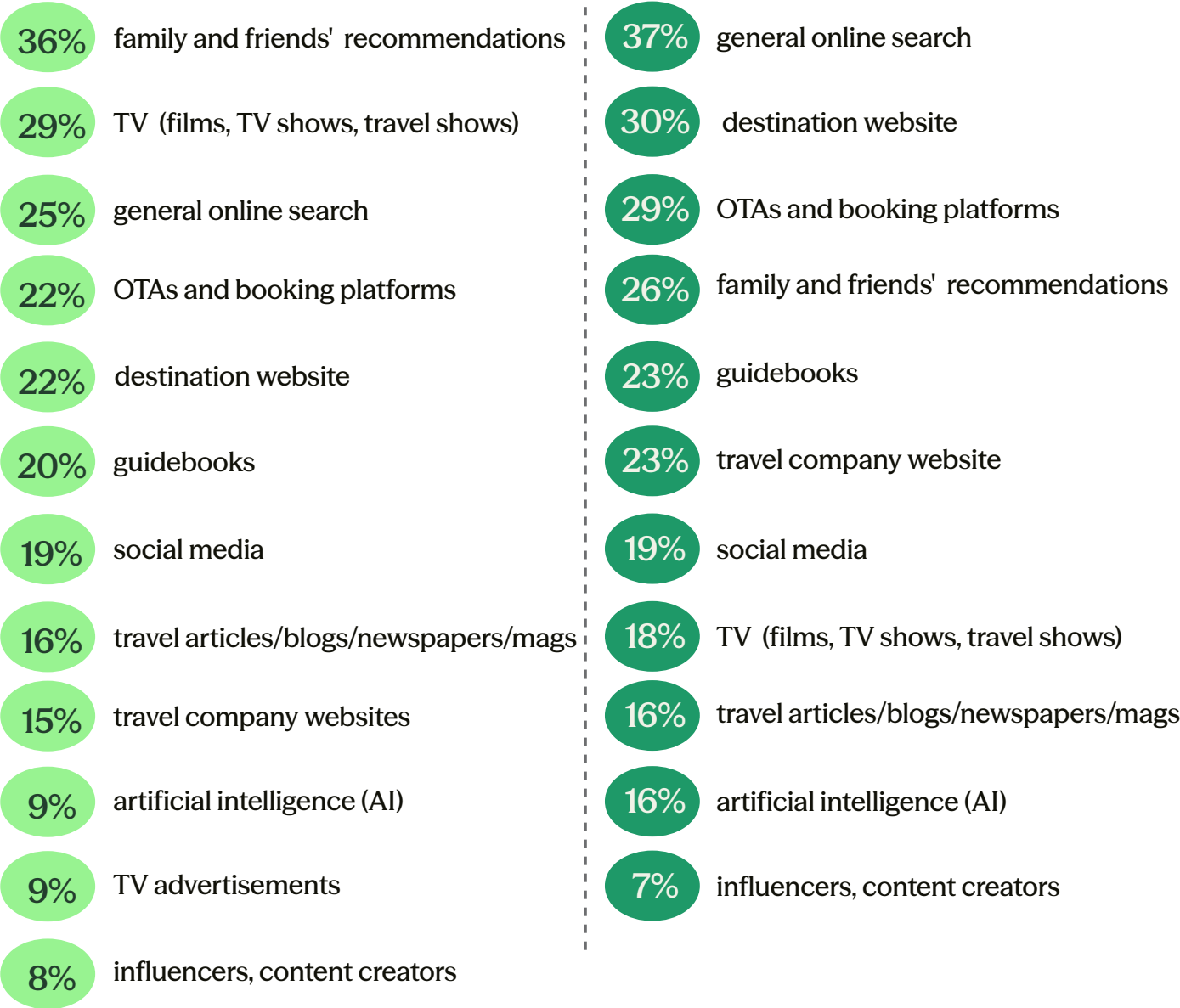
Many holidaymakers (37%) use general online search to plan their trip

DREAMING



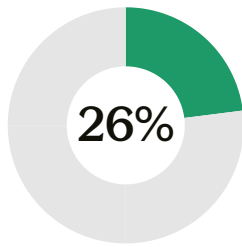
RESEARCH AND PLANNING

### BASED ON RESPONDENTS' TOP 3 SOURCES



## 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 2025 and 90% of all outbound trips from Germany were to other parts of Europe.

## ACCESS BY AIR

There were 1.25 million direct one-way air seats available on over 6,950 flights from 10 gateways in Germany to the island of Ireland in 2025.



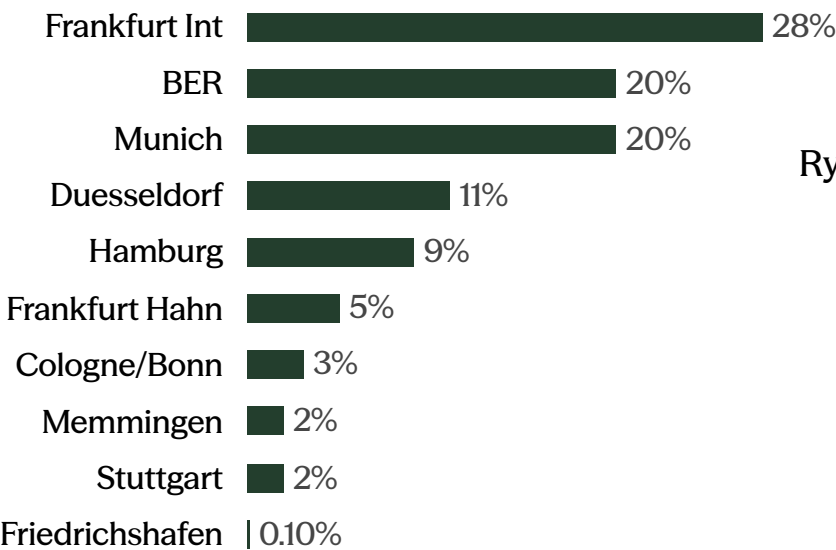
### WHERE CAN OUR TOURISTS FLY FROM?

The top five German airports accounted for the majority (88%) of seats in 2025. Frankfurt International accounted for three in ten (28%) seats.

### WHO CAN OUR TOURISTS FLY WITH?

Five carriers operated between Germany and the island of Ireland. Aer Lingus and Lufthansa accounted for 70% of seats.

#### SHARE OF SEATS BY AIRPORT (TOP 10)



BER = Berlin Brandenburg

#### SHARE OF SEATS BY CARRIER

