



# GREAT BRITAIN

## MARKET PROFILE 2025

### INBOUND TOURISTS

In 2025, the island of Ireland welcomed 4 million British tourists, who spent €1.9 billion/£1.6 billion and stayed 19 million nights. Great Britain was the island's largest overseas market by spend, tourists and nights.



€1.9/£1.6bn  
revenue

#1  
global rank



4m  
trips

#1  
global rank



19.1m  
nights

#1  
global rank

### WHERE DID OUR TOURISTS COME FROM?

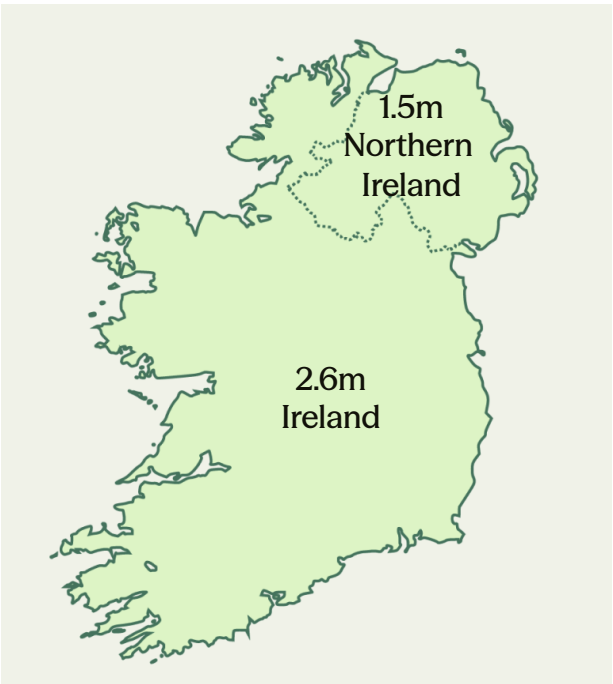
Three-quarters (77%) of British tourists visiting the island of Ireland in 2025 came from England.

ENGLAND  
77%

SCOTLAND  
19%

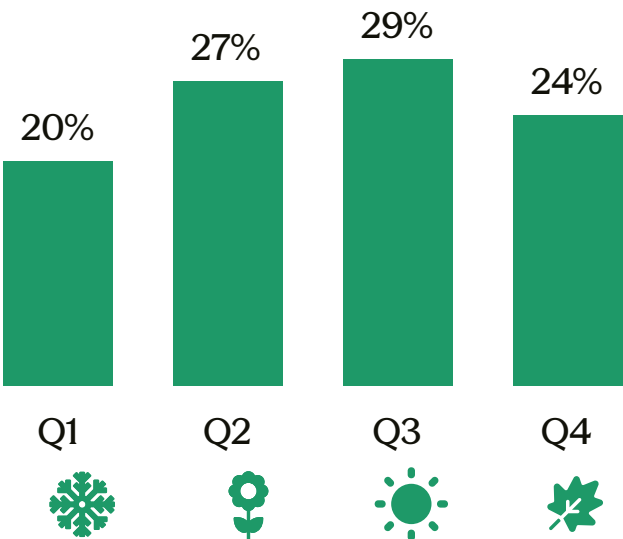
WALES  
4%

### WHERE DID OUR TOURISTS VISIT?



### WHEN DID OUR TOURISTS VISIT?

While summer (Q3) remains the peak period for 29% of British tourists, a substantial share of travel also occurs outside the summer season, supporting year-round tourism.



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

# INBOUND TOURISTS

## WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Visiting friends and/or relatives was the most common reason for travel among British tourists, accounting for 48% of visits and 36% of their spend. Holidaymakers made up a smaller share of British tourists at 28%, but still generated one-third of revenue at 33%.

|                                                                                   |          | REVENUE    | SHARE | TRIPS | SHARE | NIGHTS | SHARE |
|-----------------------------------------------------------------------------------|----------|------------|-------|-------|-------|--------|-------|
|  | HOLIDAY  | €623/£542m | 33%   | 1.1m  | 28%   | 5.2m   | 27%   |
|  | VFR      | €671/£583m | 36%   | 1.9m  | 48%   | 10.0m  | 52%   |
|  | BUSINESS | €417/£363m | 22%   | 727k  | 18%   | 2.5m   | 13%   |
|  | OTHER    | €165/£143m | 9%    | 275k  | 7%    | 1.4m   | 8%    |

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

In 2025, British tourists stayed an average of 4.8 nights on the island of Ireland and spent €471/£410 per trip, equivalent to €98/£85 per night.



€471/£410 (IOI)  
£302 (NI)

Av. spend per trip



€98/£85 (IOI)  
£74 (NI)

Av. spend per night



4.8 (IOI)  
4.1 (NI)

Av. stay (nights)

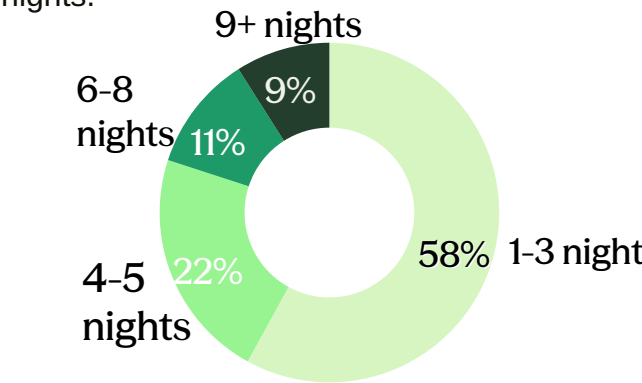
## HOW DID OUR TOURISTS SPEND THEIR MONEY?

Food and drink accounted for the largest share (40%) of British tourist spend, ahead of accommodation and all other trip costs.

|                                                                                     |                                                                                     |                                                                                     |
|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| <b>Food &amp; drink</b>                                                             | <b>Accomm.</b>                                                                      | <b>Shopping</b>                                                                     |
|  |  |  |
| 40%                                                                                 | 28%                                                                                 | 14%                                                                                 |
| <b>Transport</b>                                                                    | <b>Entertainment</b>                                                                | <b>Misc.</b>                                                                        |
|  |  |  |
| 9%                                                                                  | 7%                                                                                  | 2%                                                                                  |

## HOW LONG DID OUR TOURISTS STAY?

The majority (58%) visited the island of Ireland for a short break of up to three nights.



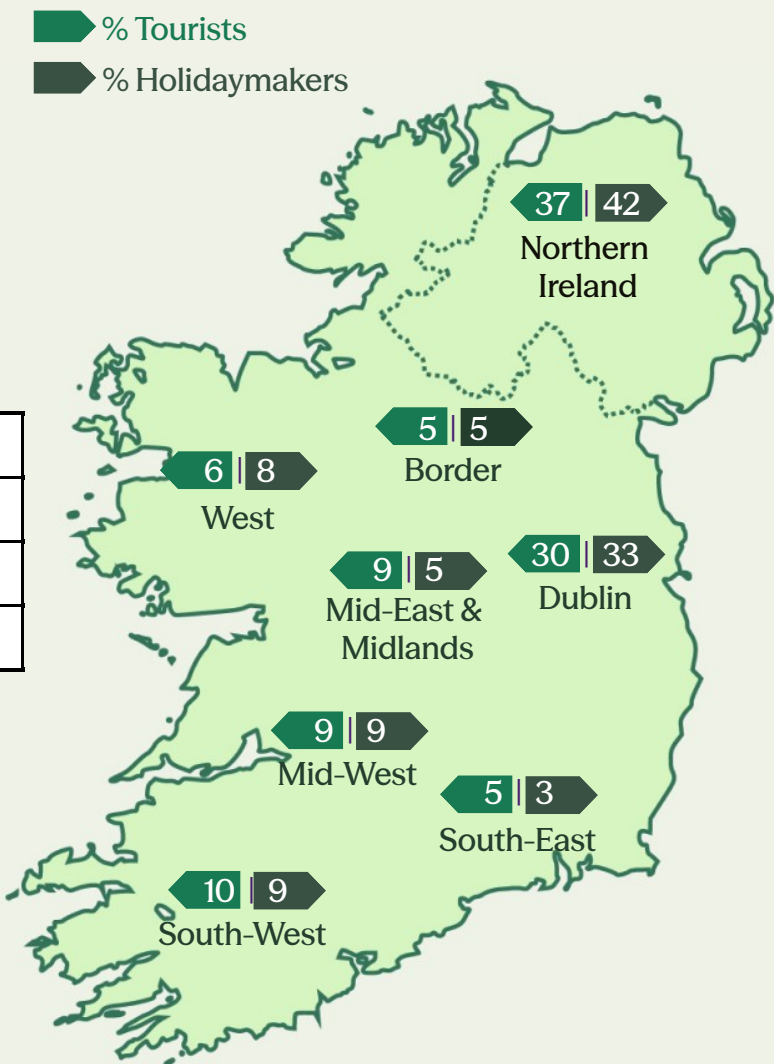
# INBOUND TOURISTS AND HOLIDAYMAKERS

## 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 144,000 British tourists and 49,000 holidaymakers overnighted on both sides of the border.

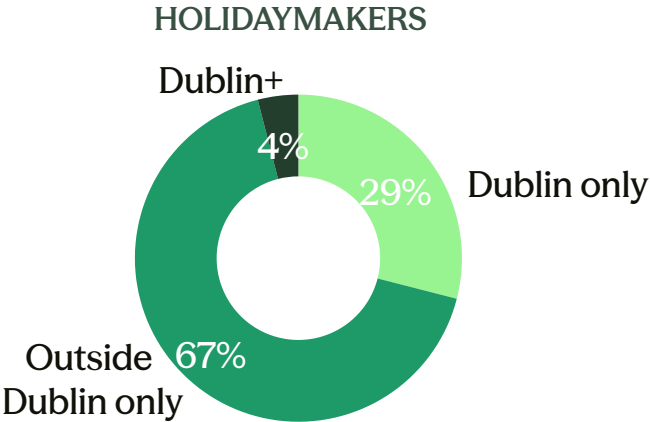
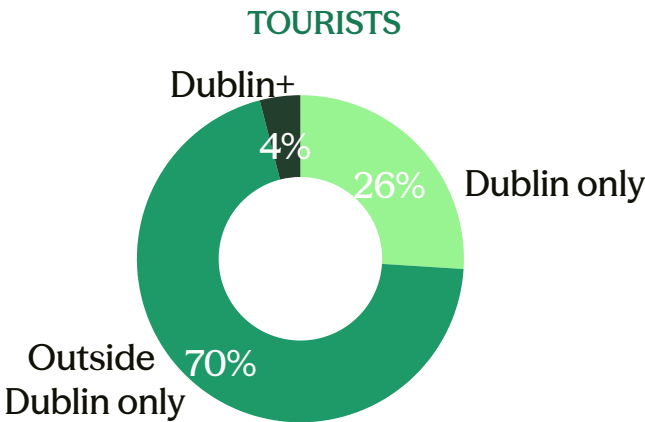
| Top | Tourists         | Holidaymakers    |
|-----|------------------|------------------|
| 1   | Northern Ireland | Northern Ireland |
| 2   | Dublin           | Dublin           |
| 3   | South-West       | South-West       |



**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

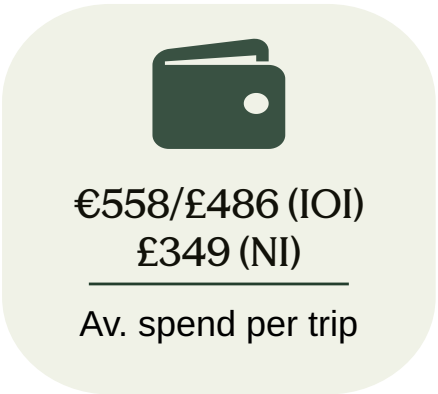
## WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

The majority of British tourists (70%) and holidaymakers (67%) stayed outside Dublin on their trip, with around one-third staying exclusively in Northern Ireland (34% of tourists and 38% of holidaymakers).



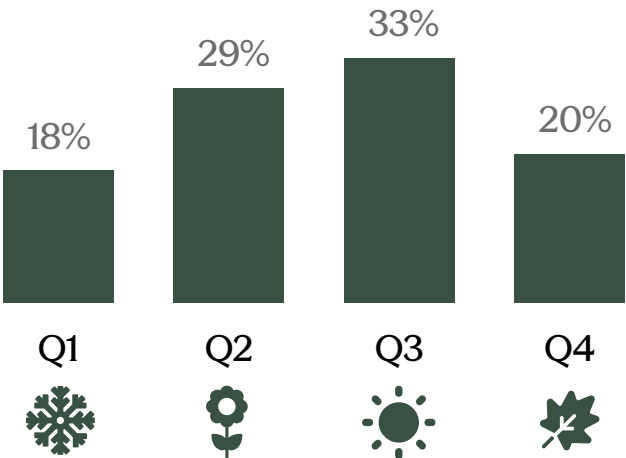
# INBOUND HOLIDAYMAKERS

Great Britain was the island of Ireland’s largest source of holidaymakers and the second-largest source of overseas holiday revenue and holiday nights. British holidaymakers typically came for short breaks, staying an average of 4.6 nights on the island of Ireland. Those visiting Northern Ireland stayed an average of 3.1 nights.



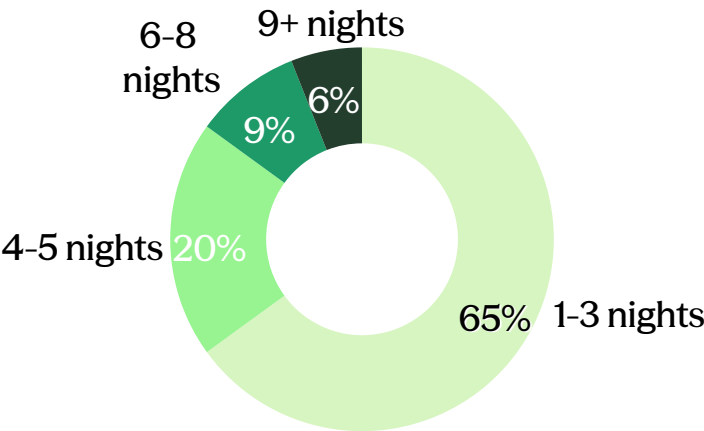
## WHEN DID OUR HOLIDAYMAKERS VISIT?

Visits were spread across the year, with 38% of British holidaymakers visiting in the off-peak and shoulder months (October–March).



## HOW LONG DID OUR HOLIDAYMAKERS STAY?

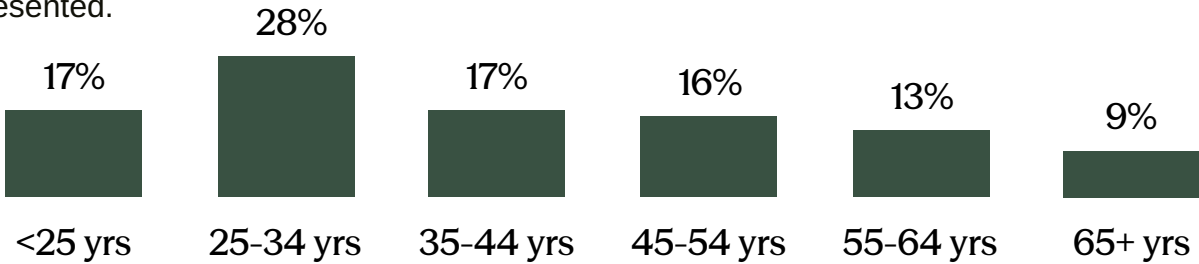
Most British holidaymakers (65%) stayed on the island of Ireland for a short break of up to three nights.



# INBOUND HOLIDAYMAKERS

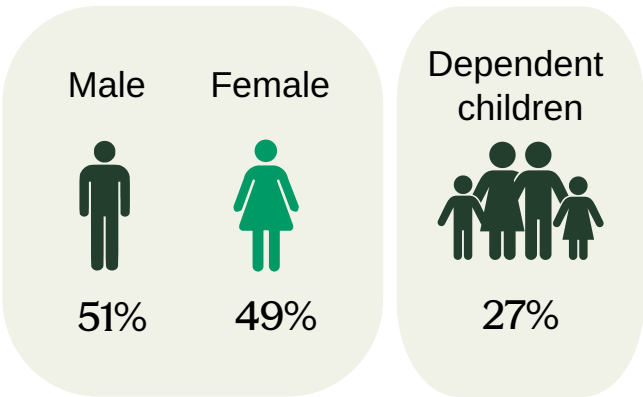
## WHAT AGE WERE OUR HOLIDAYMAKERS?

Most British holidaymakers (62%) were aged under 45, although all age groups were well represented.



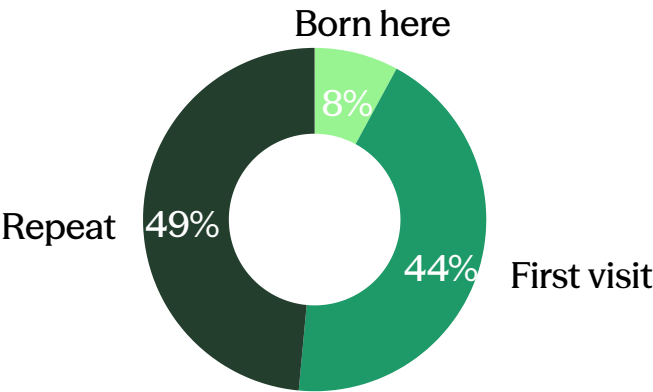
## HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN\*

Just over a quarter of British holidaymakers visiting the island of Ireland (27%) had dependent children in their household.



## HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

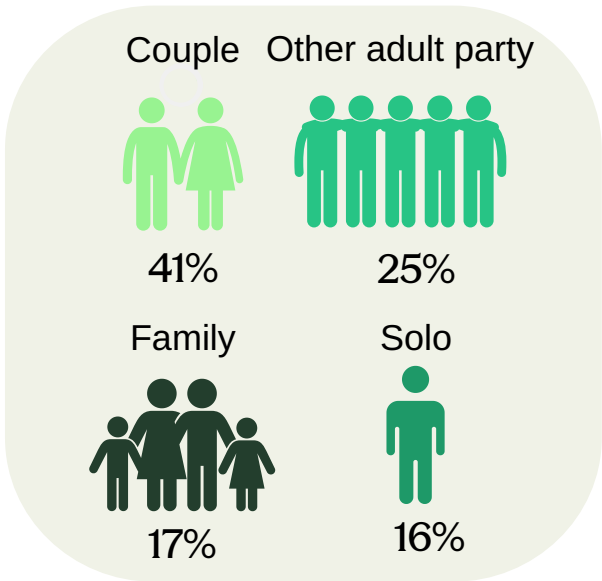
Around half (49%) of British holidaymakers had previously visited, while 8% were born on the island of Ireland.



## WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

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

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

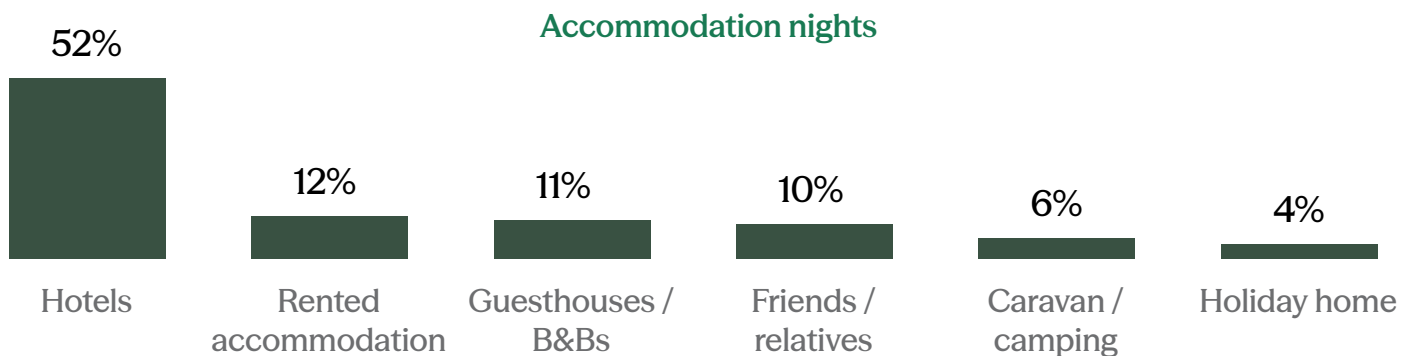


\*Survey of Overseas Travellers only  
Source: Fáilte Ireland's Survey of Overseas Travellers, NISRA

# INBOUND HOLIDAYMAKERS

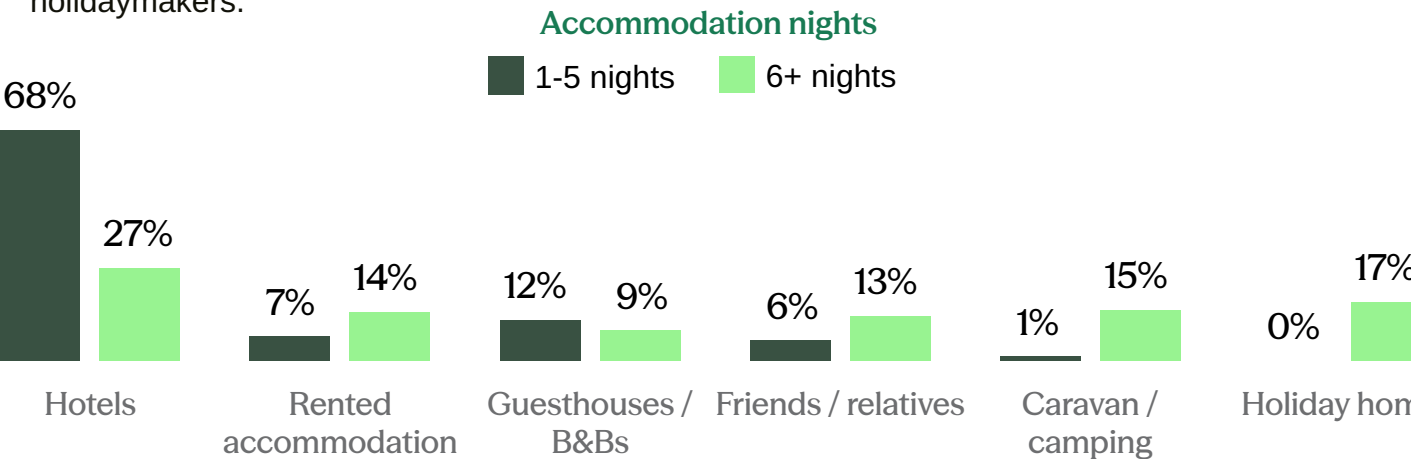
## WHERE DID OUR HOLIDAYMAKERS STAY?

Over half (52%) of nights stayed by British holidaymakers were in hotels, while around one in seven (12%) nights were spent in rented accommodation.



## HOW DID ACCOMMODATION CHOICE VARY BY LENGTH OF STAY?\*

Hotels (68% of bednights) were especially popular among British holidaymakers on short breaks (1–5 nights), but also among those on longer breaks. Holiday homes, camping or using a caravan, rentals and staying with friends and family were more popular among longer-staying holidaymakers.



## HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?\*

Almost all (96%) British holidaymakers travelled independently and one in four (26%) used a car while on the island of Ireland.

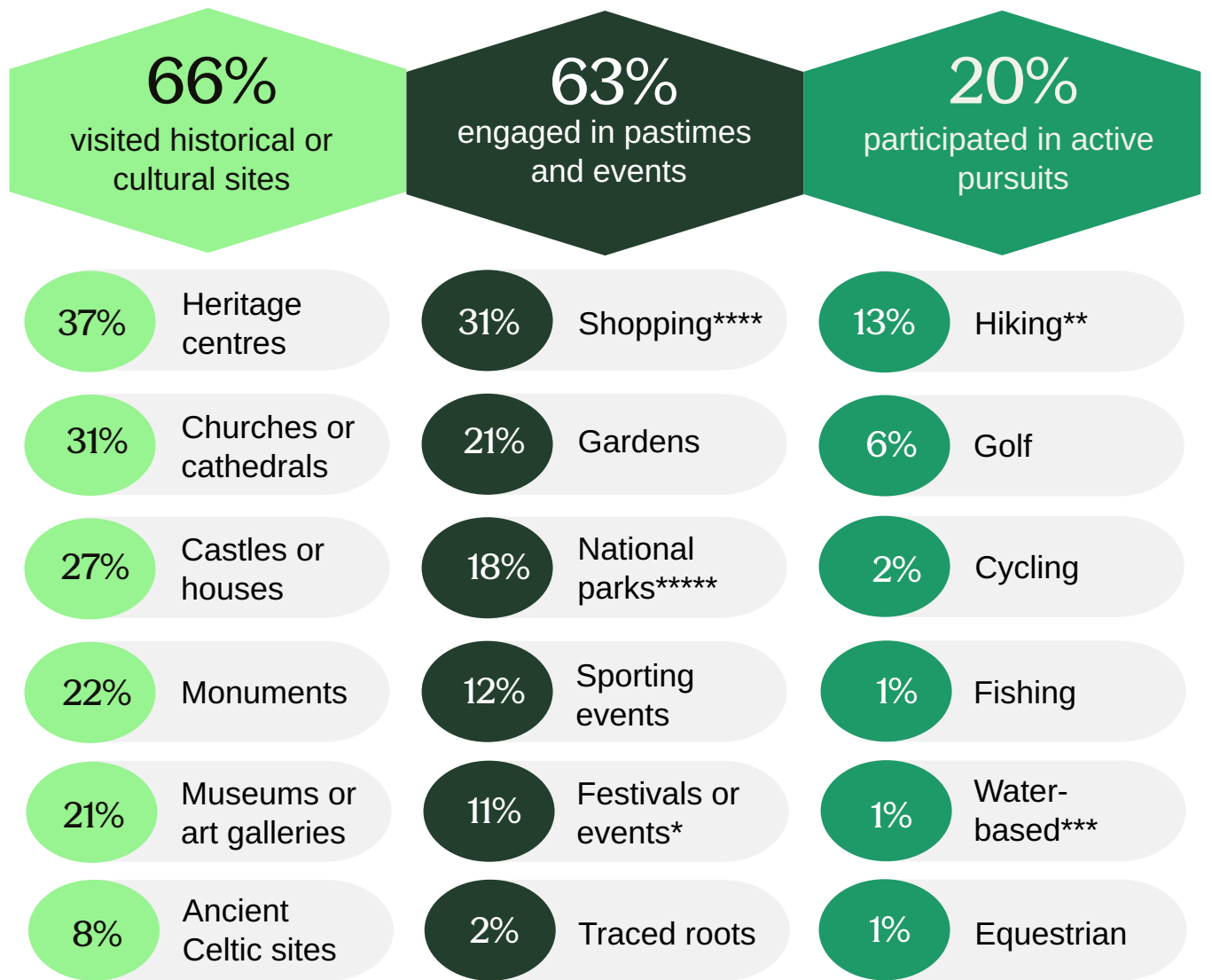


\*Survey of Overseas Travellers only  
Source: Fáilte Ireland's Survey of Overseas Travellers

# INBOUND HOLIDAYMAKERS

## WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

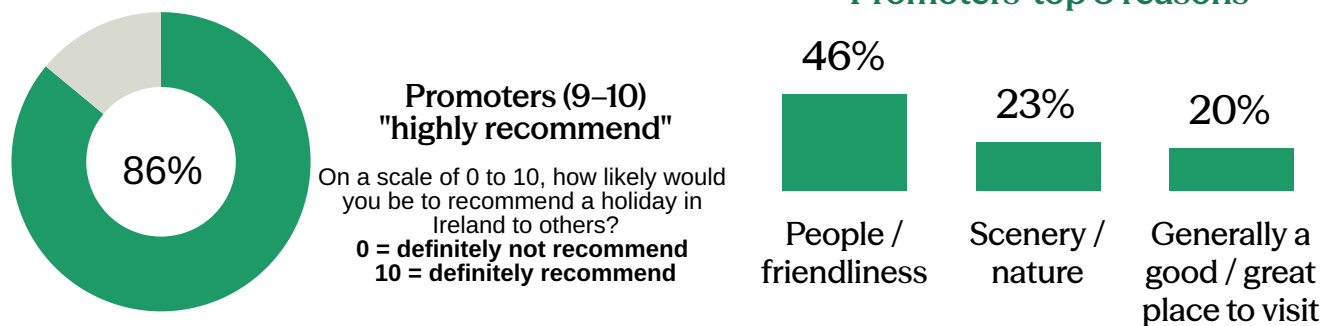
British holidaymakers are engaged tourists. They explored our historical sites and engaged in multiple pastimes while on the island of Ireland.



\*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 (86%) of British holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (46%), our scenery and nature (23%) and that it is generally a good/great place to visit (20%).



# OUTBOUND HOLIDAYMAKERS

## SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Great Britain outbound holidaymakers rely on multiple different sources at different stages of their travel journey.

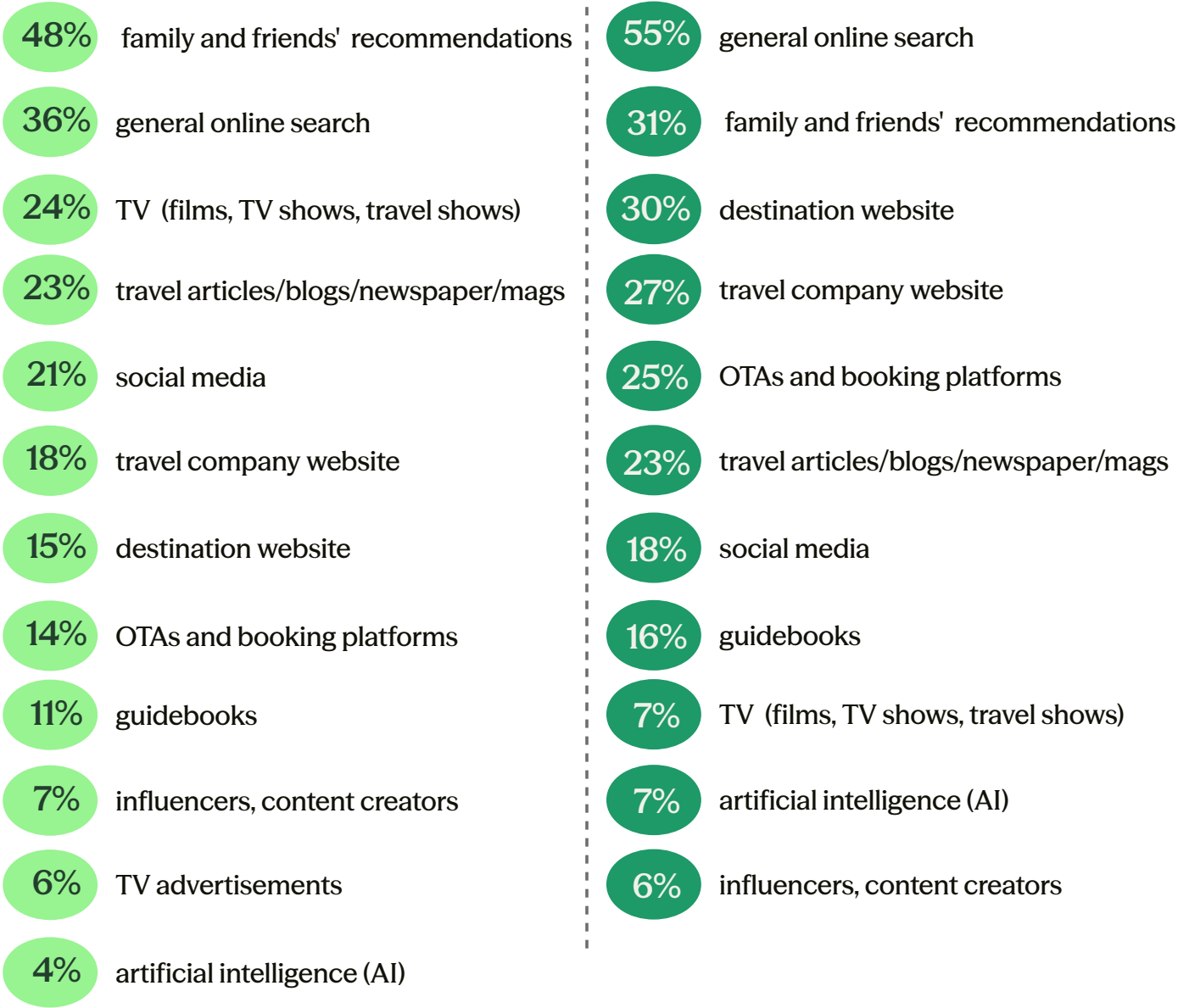
British holidaymakers are most often inspired by people they trust, but turn to online search and official travel sources when planning their trip.

One in two cited inspiration from family and friends' recommendations

As travellers move into planning, digital channels take centre stage, led by general online search (55%)

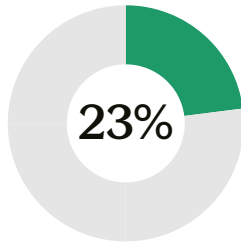


### BASED ON RESPONDENTS' TOP 3 SOURCES



## 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

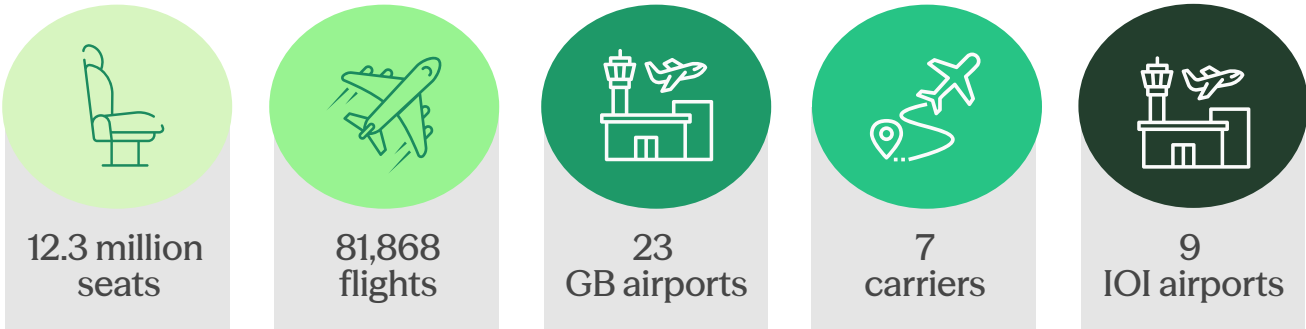
- |   |                                                                                     |                                                    |    |                                                                                     |                                                 |
|---|-------------------------------------------------------------------------------------|----------------------------------------------------|----|-------------------------------------------------------------------------------------|-------------------------------------------------|
| 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

In 2025, Great Britain was the world's third-largest outbound market, with 76% of its outbound trips going to other parts of Europe.

## ACCESS BY AIR

In 2025, more than 81,868 flights from 23 gateways in Great Britain provided 12.3 million direct one-way air seats to the island of Ireland.



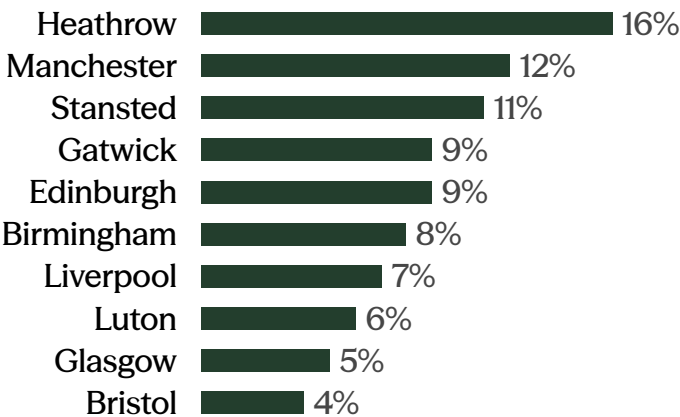
### WHERE CAN OUR TOURISTS FLY FROM?

In 2025, the top ten British airports accounted for most seats (87%), with four London airports – Heathrow, Gatwick, Stansted and Luton – providing almost half (42%).

### WHO CAN OUR TOURISTS FLY WITH?

Seven carriers operated routes between Great Britain and the island of Ireland. Three key carriers provided most seats (91%): Ryanair (46%), Aer Lingus (24%) and easyJet (21%).

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



### SHARE OF SEATS BY CARRIER

