

GERMANY

MARKET PROFILE

2023



INBOUND TOURISTS

The island of Ireland welcomed more than 463,000 German tourists who spent over €430/£374 million and stayed 4 million nights. This makes Germany the island's third-largest source of overseas revenue, tourists and nights.



WHERE DID OUR TOURISTS COME FROM?

Around three-quarters (73%) of German tourists came from six regions (Nordrhein-Westfalen, Bavaria, Berlin, Hessen, Baden-Württemberg and Niedersachsen).

| Nordrhein-Westfalen | Berlin | Bavaria | Hessen | Baden-Württemberg | Niedersachsen | Other |
|---------------------|--------|---------|--------|-------------------|---------------|-------|
| 20% | 15% | 12% | 11% | 10% | 6% | 27% |

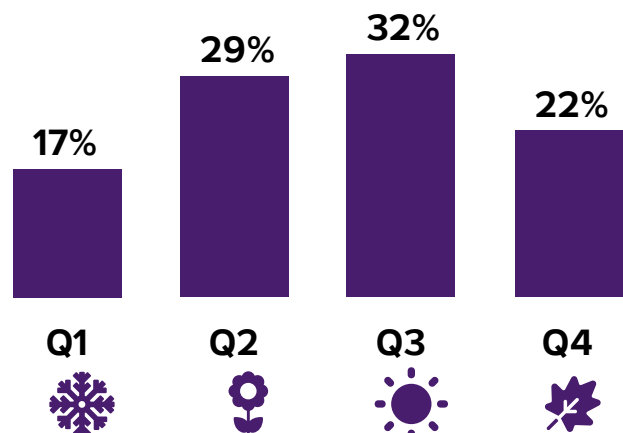
WHERE DID OUR TOURISTS VISIT?



*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 (61%) German tourists visited the island of Ireland during Q2 and Q3 (April - September).



INBOUND TOURISTS

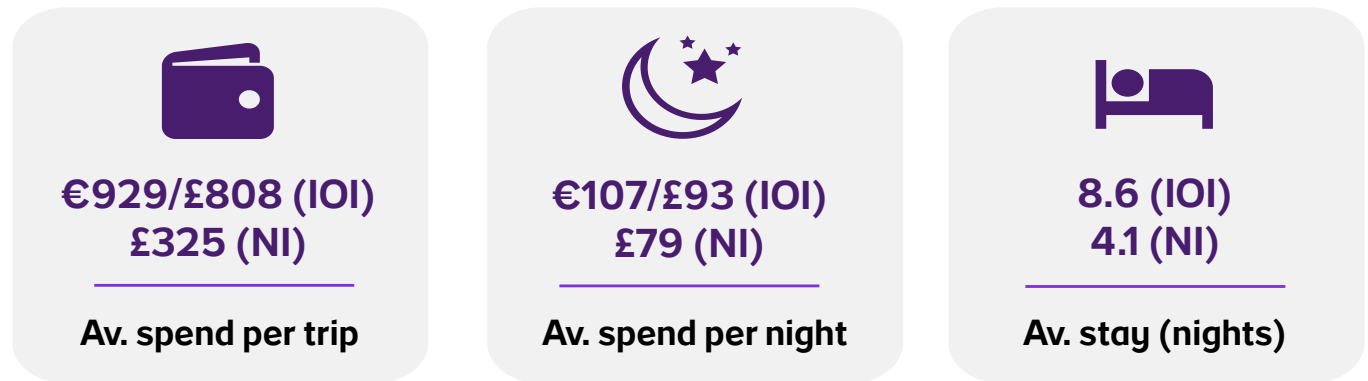
WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Over half (53%) of German tourists visiting the island of Ireland in 2023 were holidaymakers, accounting for 59% of German tourism revenue. A quarter (25%) were visiting friends and/or relatives (VFR).

| | REVENUE | SHARE | TRIPS | SHARE | NIGHTS | SHARE |
|--|------------|-------|-------|-------|--------|-------|
|  HOLIDAY | €255/£222m | 59% | 243k | 53% | 1.8m | 46% |
|  VFR | €46/£40m | 11% | 118k | 25% | 773k | 19% |
|  BUSINESS | €75/£65m | 17% | 81k | 18% | 576k | 14% |
|  OTHER | €54/£47m | 13% | 24k | 5% | 809k | 20% |







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

On average, German tourists spent €929/£808 per trip or €107/£93 per night and stayed 8.6 nights on the island of Ireland in 2023.



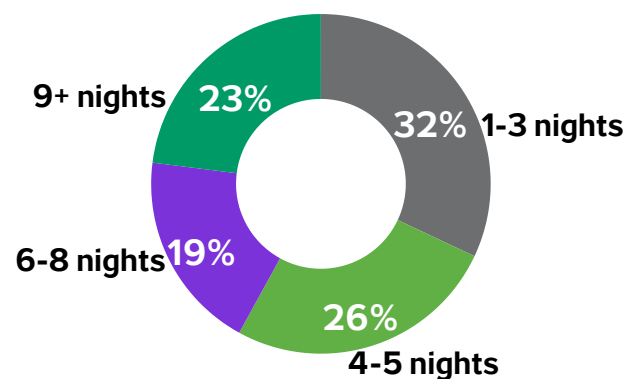
HOW DID OUR TOURISTS SPEND THEIR MONEY?

Almost two-fifths (38%) of German tourists' revenue was spent on accommodation and a third (32%) was spent on food and drink.

| | | |
|--|--|---|
| <p>Accomm.</p>  <p>38%</p> | <p>Food & Drink</p>  <p>32%</p> | <p>Transport</p>  <p>13%</p> |
| <p>Shopping</p>  <p>10%</p> | <p>Entertainment</p>  <p>6%</p> | <p>Misc.</p>  <p>1%</p> |

HOW LONG DID OUR TOURISTS STAY?

Over two-thirds (68%) stayed four or more nights on the island of Ireland.



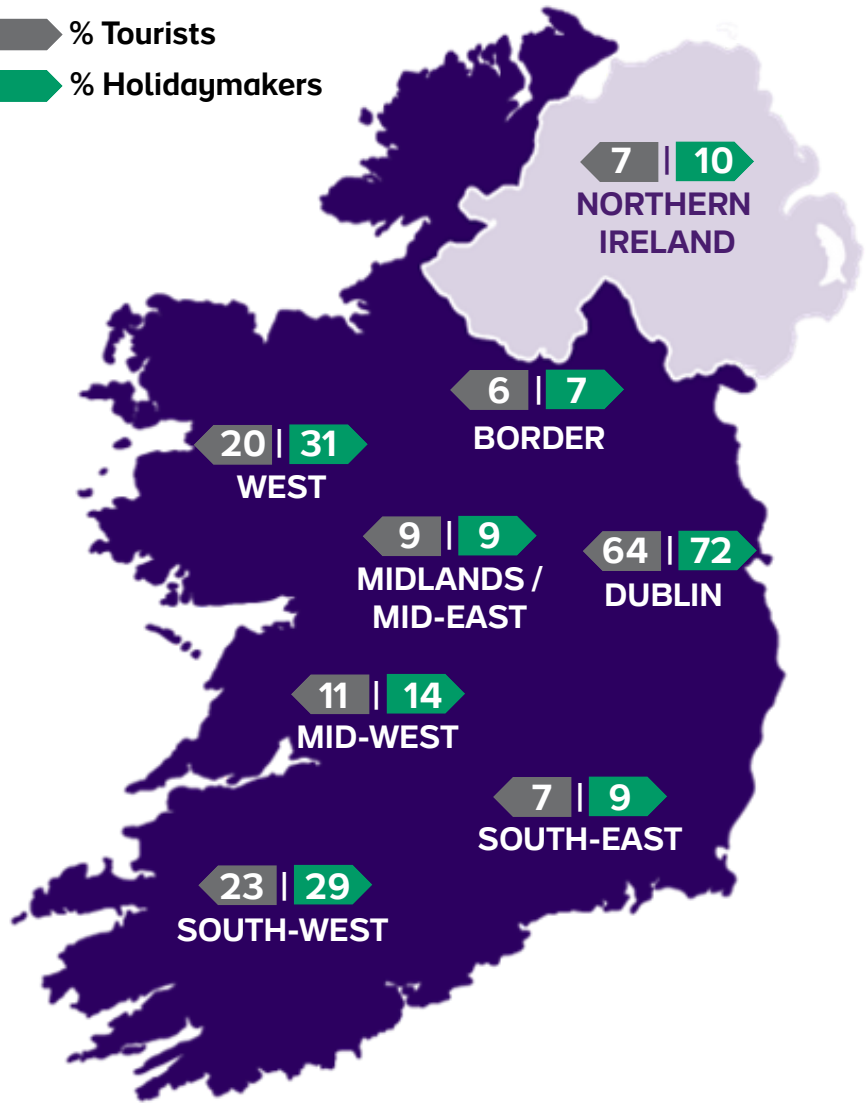
INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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

Over 23,000 German tourists and 18,000 holidaymakers overnighted on both sides of the border.

▶ % Tourists
▶ % Holidaymakers

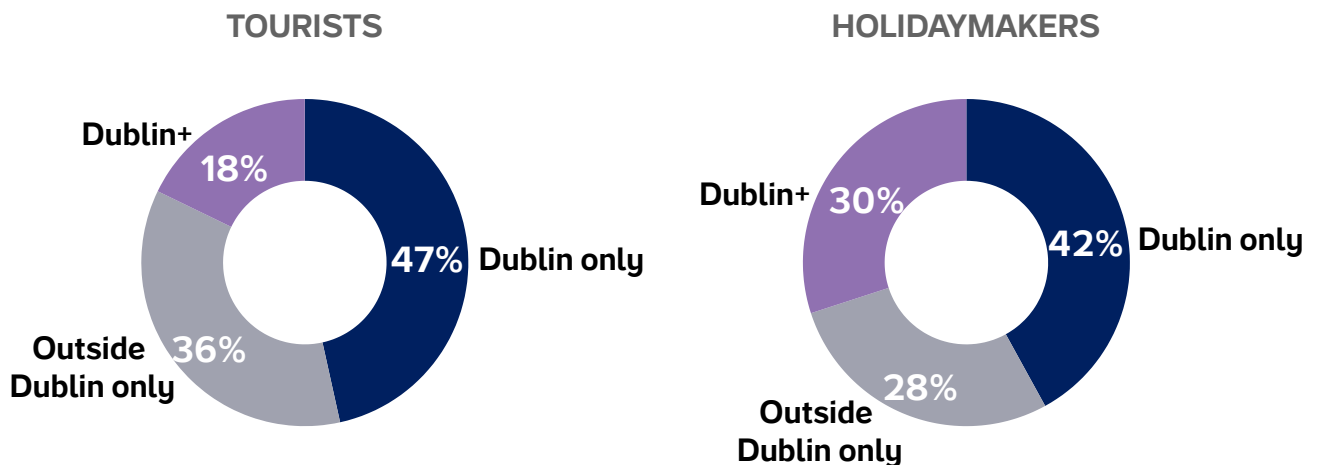


| Rank | Tourists | Holidaymakers |
|------|------------|---------------|
| #1 | Dublin | Dublin |
| #2 | South-West | West |
| #3 | West | South-West |

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

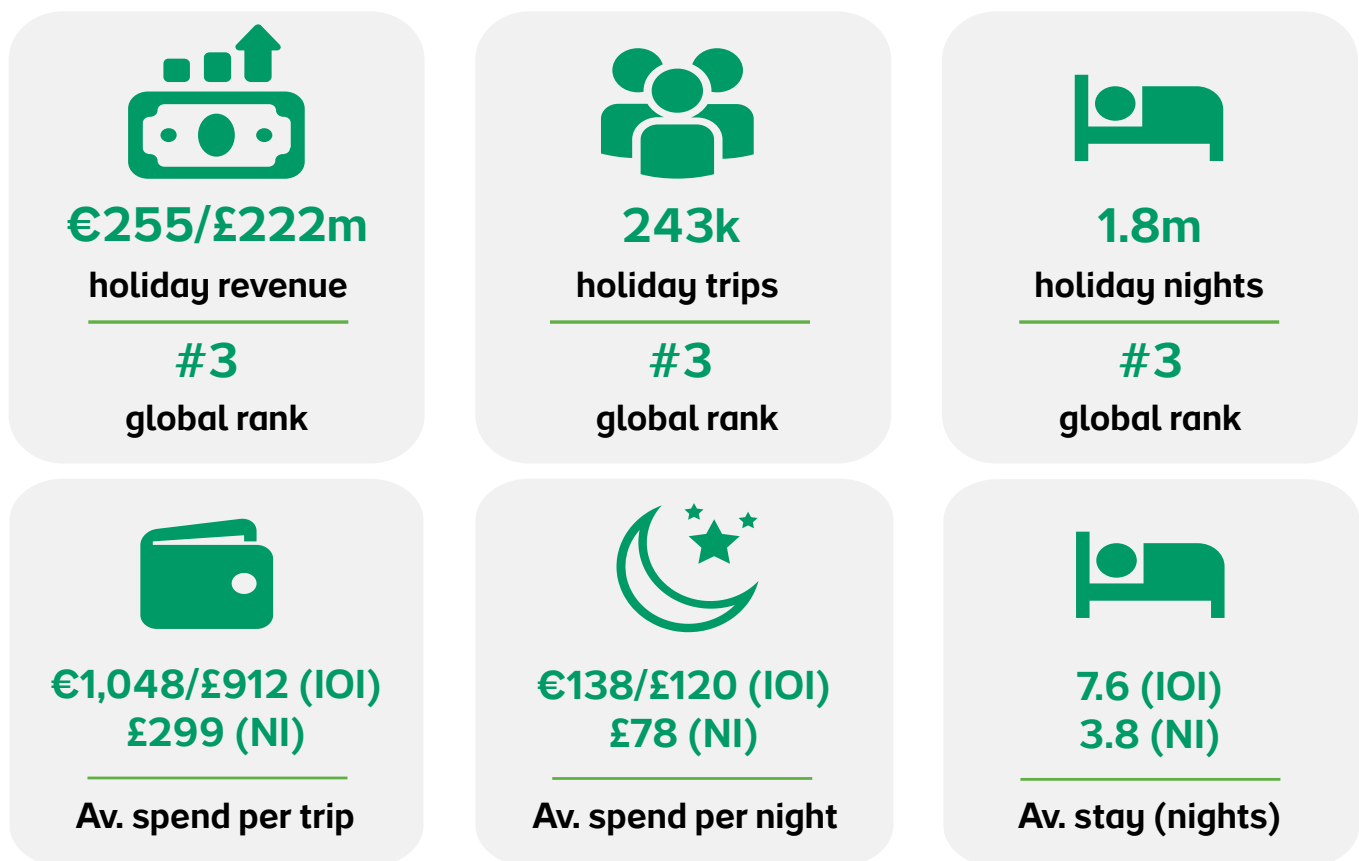
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of German tourists (64%) and holidaymakers (72%).



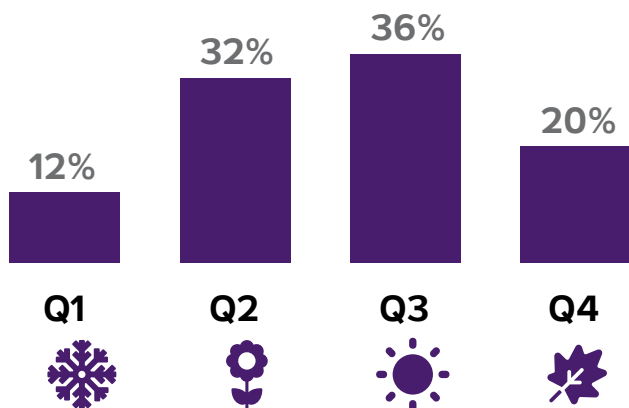
INBOUND HOLIDAYMAKERS

Germany was the island of Ireland’s third-largest source of holiday nights, holiday revenue and holidaymakers. German holidaymakers stayed an average of 7.6 nights on the island of Ireland. Those who visited Northern Ireland stayed an average of 3.8 nights there.



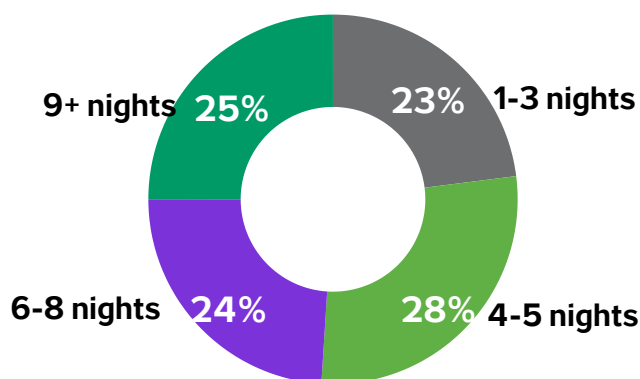
WHEN DID OUR HOLIDAYMAKERS VISIT?

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



HOW LONG DID OUR HOLIDAYMAKERS STAY?

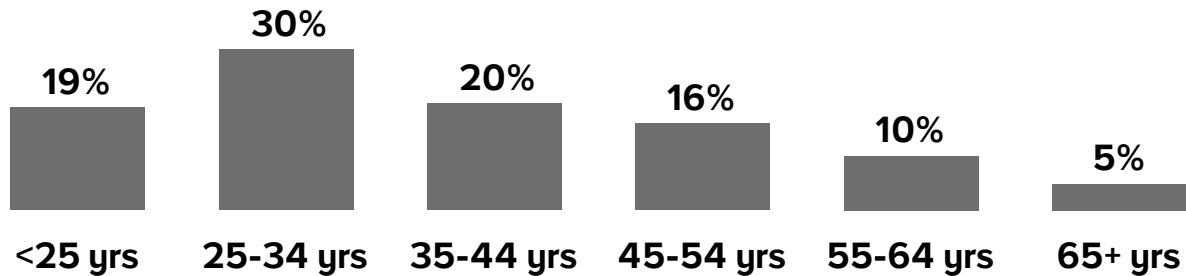
The majority (77%) of German holidaymakers stayed four or more nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

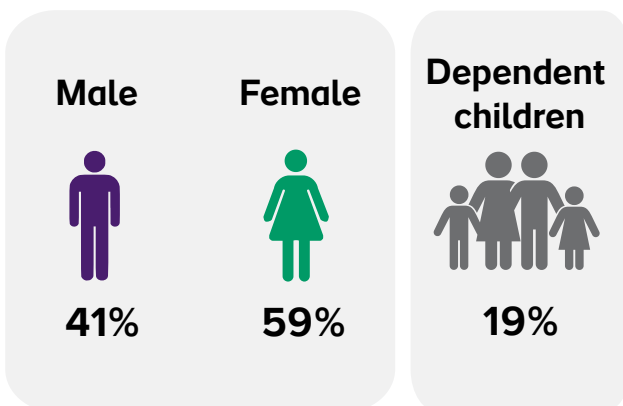
WHAT AGE WERE OUR HOLIDAYMAKERS?

Half (50%) of German holidaymakers were 25 - 44 years old.



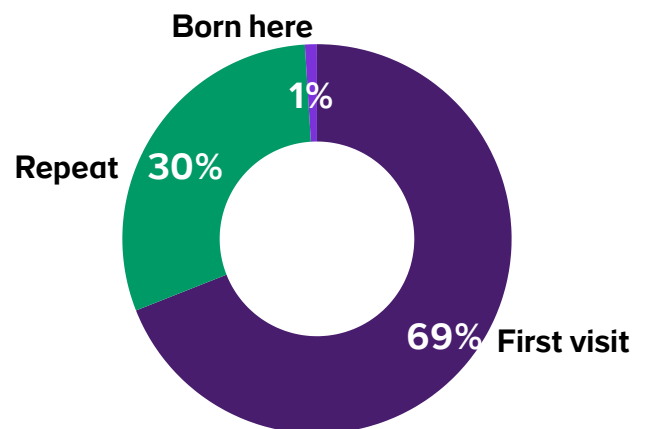
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

Around six-in-ten (59%) of German holidaymakers were female. A fifth (19%) of German holidaymakers had dependent children in the home (whether empty nesters or pre-children).



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

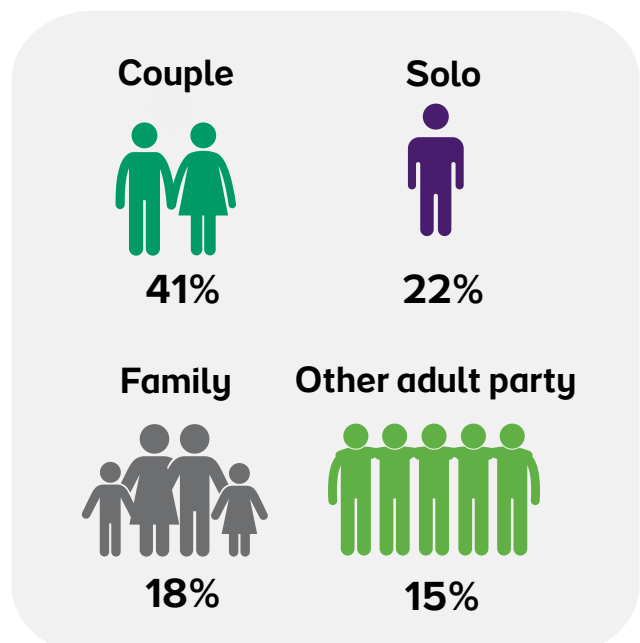
It was a first visit for around two-thirds (69%) of German holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Two-fifths (41%) of German holidaymakers visited with their partner/spouse.

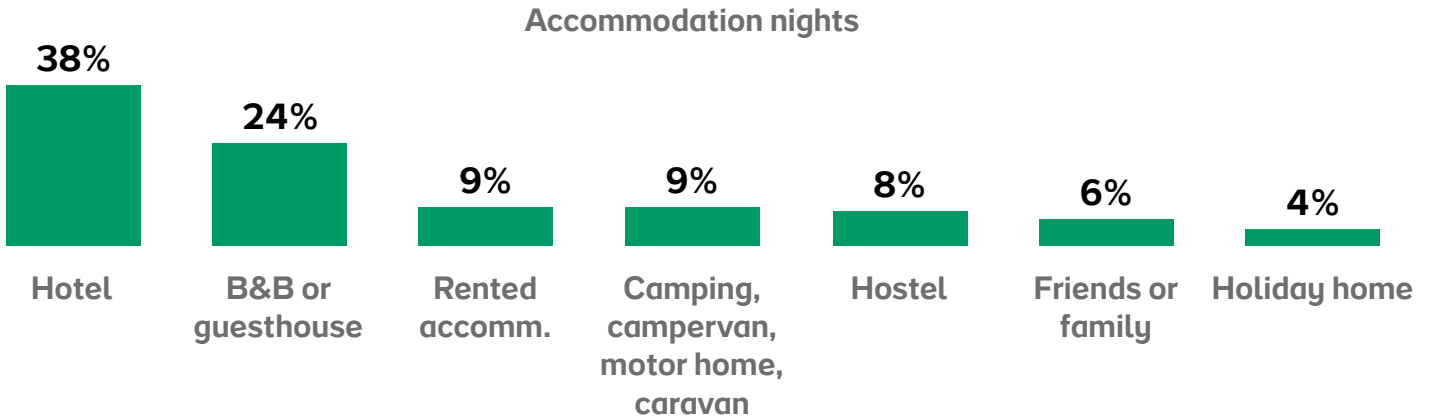
One-in-five visited alone (22%).



INBOUND HOLIDAYMAKERS

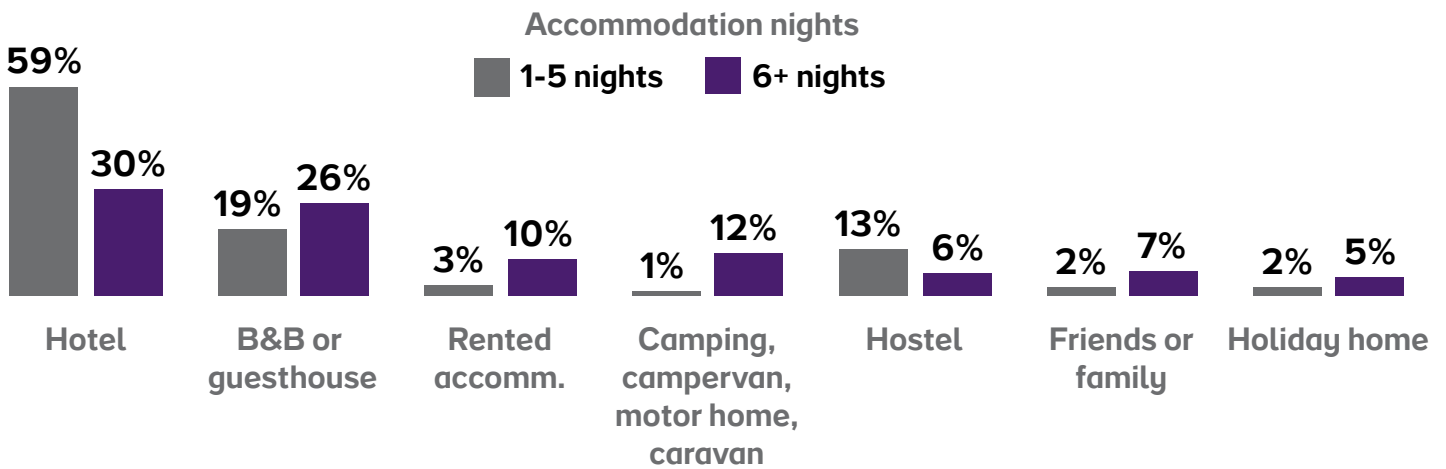
WHERE DID OUR HOLIDAYMAKERS STAY?

The majority (62%) of nights stayed by German holidaymakers were in hotels (38%) and B&Bs or guesthouses (24%).



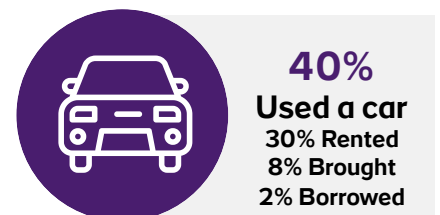
HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?

Hotels (59%) are especially popular among German holidaymakers on short breaks (1-5 nights), while B&Bs or guesthouses (26%) were almost as popular as hotels (30%) for those staying 6+ nights.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

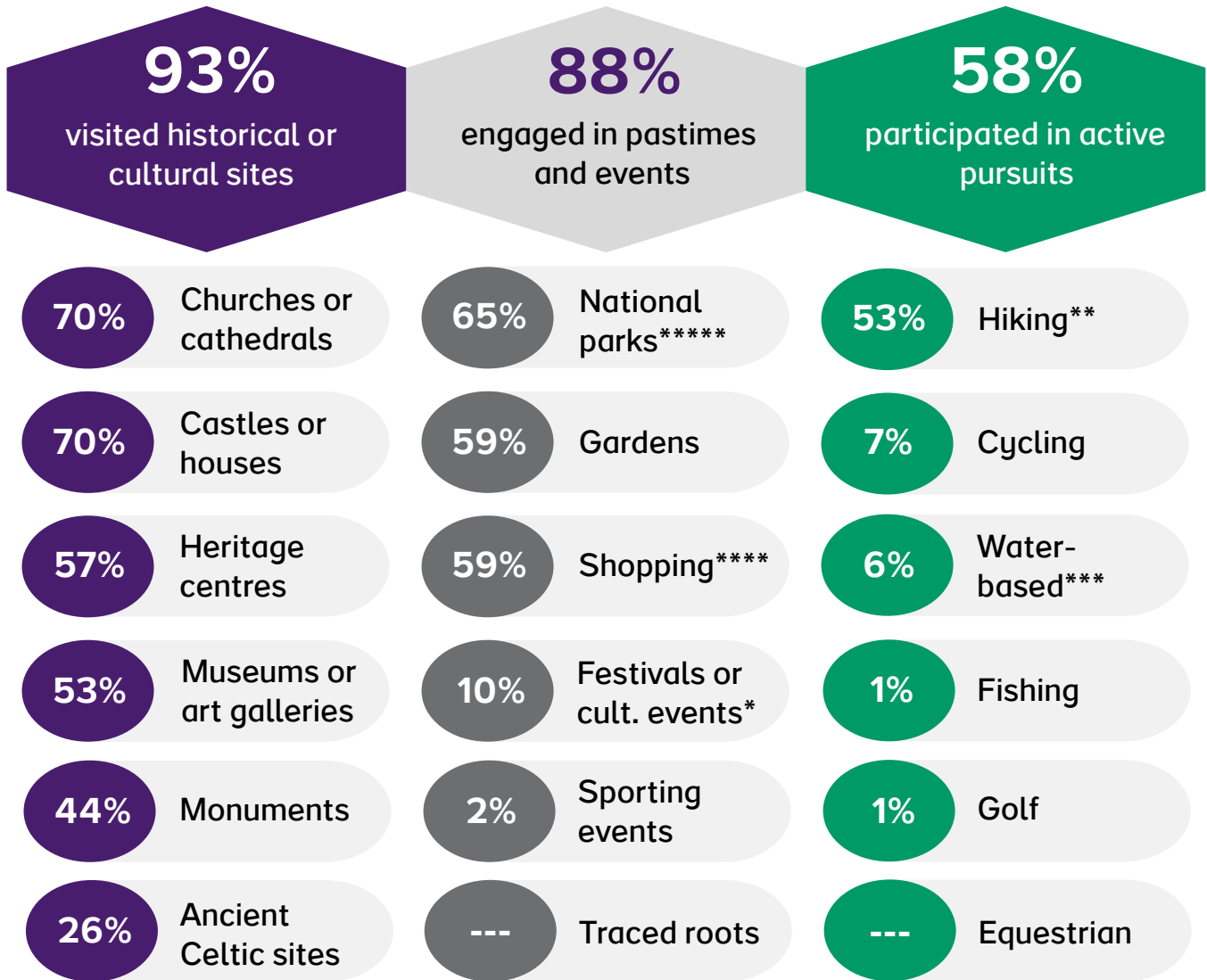
The majority (93%) of German holidaymakers travelled independently and over two-fifths (45%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

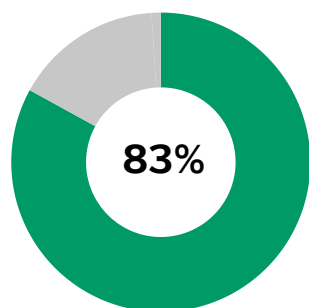
German holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



*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

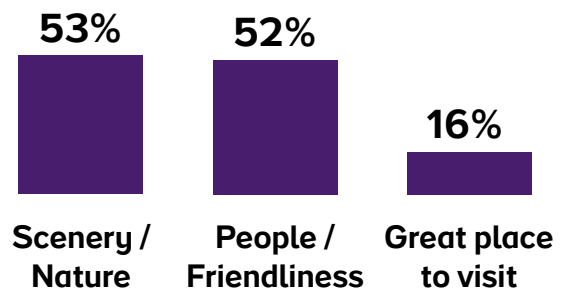
The majority (83%) of German holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the scenery and nature (53%), friendly people (52%) and that it's generally a great place to visit (16%).



**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 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.

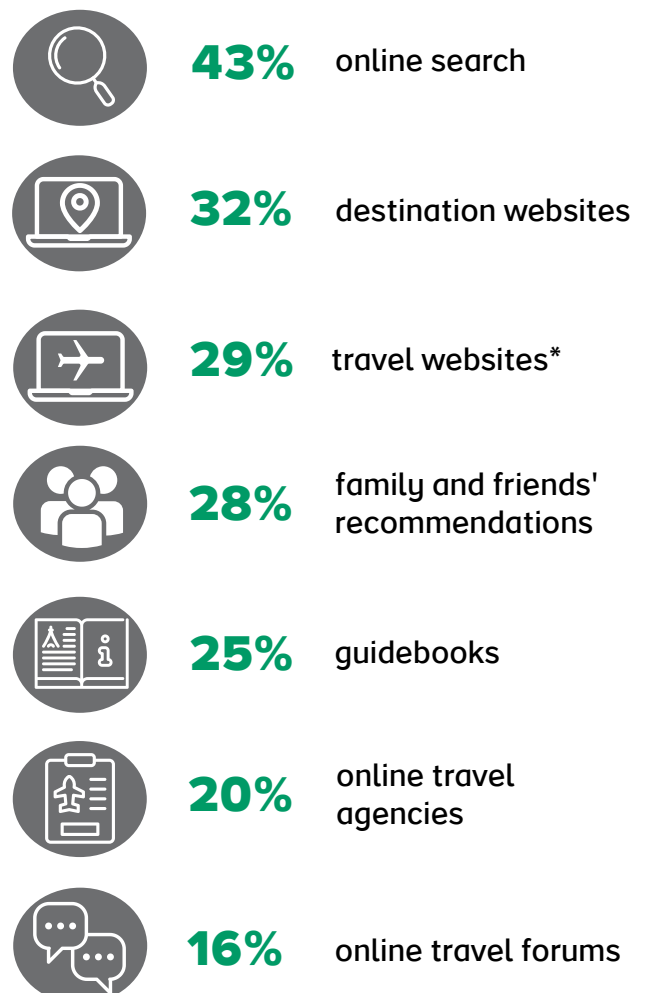
1-in-3 cite films, TV shows and travel shows as a source of inspiration

2-in-5 cited online search for the purpose of research and planning

DREAMING



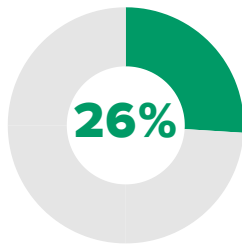
RESEARCH AND PLANNING



*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

-  To feel connected to nature
-  To broaden and stimulate my mind
-  To feel the character of the place and people
-  To appreciate historical/modern architecture
-  To experience the vibrancy of the place and people
-  To experience living like a local
-  To enjoy authentic moments with friendly locals
-  To be transported back in history
-  To discover and explore somewhere new
-  To enjoy the beauty of the landscape

OUTBOUND TOURISTS

Germany was the world's largest outbound market in 2023 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 over 7,000 flights from Germany to the island of Ireland in 2023. There were 11 gateways from Germany to airports on the island of Ireland.



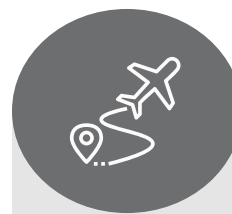
1.2 million seats



7,116 flights



11 DE airports



4 carriers



5 IOI airports

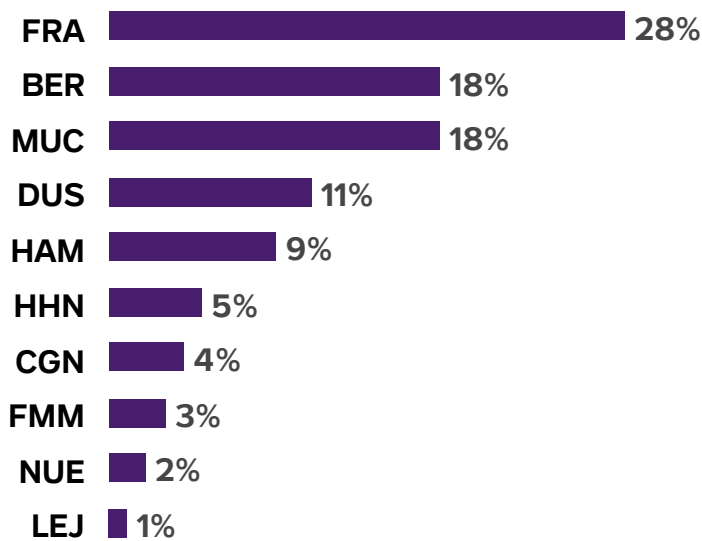
WHERE CAN OUR TOURISTS FLY FROM?

The top five German airports accounted for the majority (85%) of seats in 2023. Frankfurt International accounted for nearly three-in-ten (28%) seats.

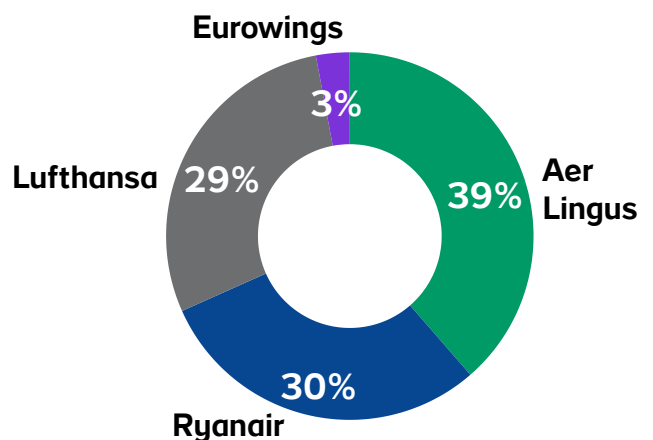
WHO CAN OUR TOURISTS FLY WITH?

Four carriers operated between Germany and the island of Ireland. In 2023, Aer Lingus was responsible for delivering around two-in-five (39%) seats to the island of Ireland.

Share of seats by airport



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