

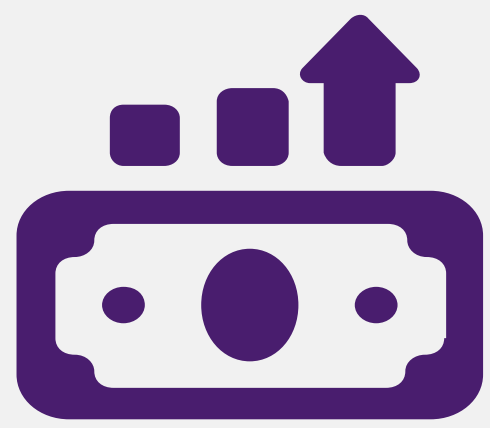
GREAT BRITAIN

MARKET PROFILE 2023



INBOUND TOURISTS

The island of Ireland welcomed over 3.9 million British tourists who spent €1.8/£1.5 billion and stayed 19.7 million nights in 2023. This makes Great Britain the island's largest source of overseas tourists (45%), nights (32%) and revenue (27%).



€1.8/£1.5bn
revenue

#1
global rank



3.9m
trips

#1
global rank



19.7m
nights

#1
global rank

WHERE DID OUR TOURISTS COME FROM?

The majority (80%) of British tourists visiting the island of Ireland came from England in 2023.

ENGLAND

80%

SCOTLAND

16%

WALES

4%

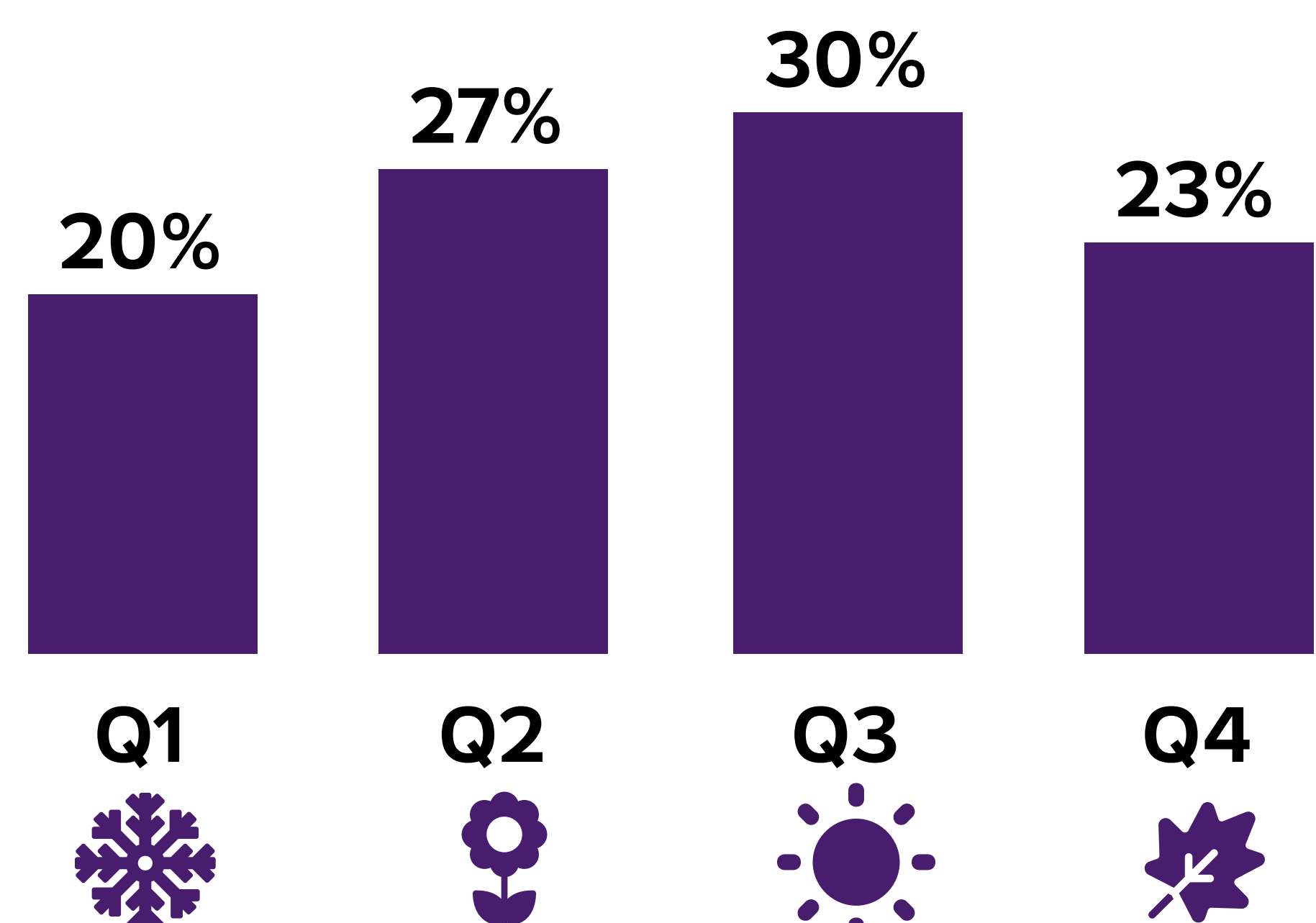
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?





Around three-fifths (57%) of British tourists visited the island during Q2 and Q3 (April - September).



INBOUND TOURISTS

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Almost half (49%) of British tourists were visiting friends and/or relatives (VFR) and they accounted for 33% of Britain's tourism revenue. While British holidaymakers were fewer in number (28% of British tourists), they also accounted for a third (33%) of Britain's revenue.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€587/£511m	33%	1.1m	28%	5.2m	26%
 VFR	€576/£501m	33%	1.9m	49%	10.8m	55%
 BUSINESS	€413/£359m	23%	684k	17%	2.2m	11%
 OTHER	€182/£158m	10%	244k	6%	1.5m	8%




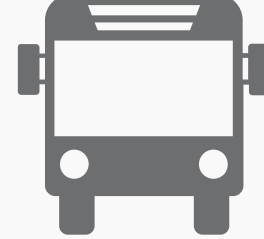


HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?

On average, British tourists spent €449/£391 per trip or €89/£78 per night and stayed 5 nights on the island of Ireland in 2023.



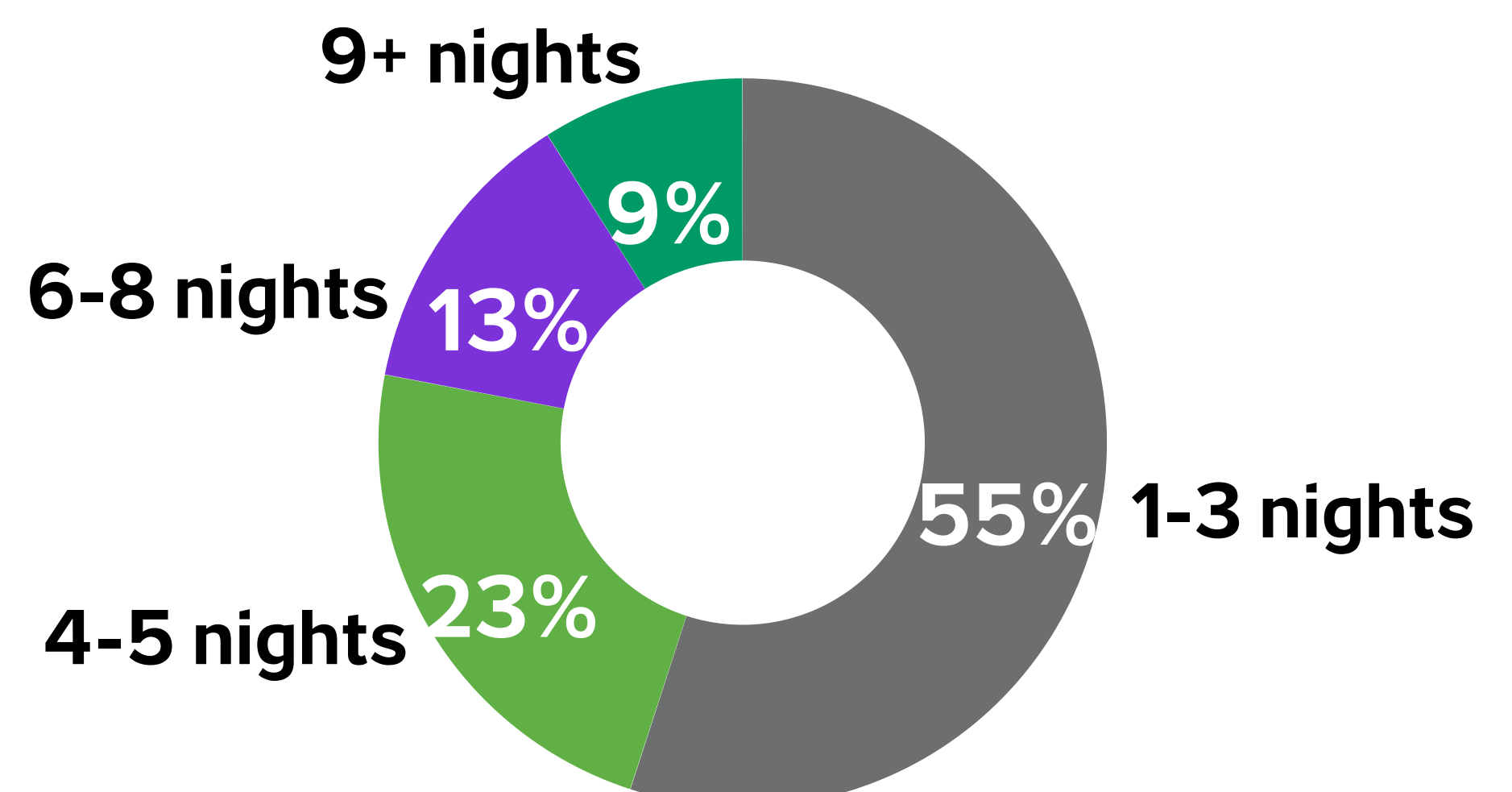
HOW DID OUR TOURISTS SPEND THEIR MONEY?

British tourists spent more on food and drink (36%) than on accommodation or any other element of their stay.

Food & Drink  36%	Accomm.  27%	Shopping  20%
Transport  10%	Entertainment  5%	Misc.  2%

HOW LONG DID OUR TOURISTS STAY?

The majority (55%) visited the island of Ireland for a short break of up to three nights.



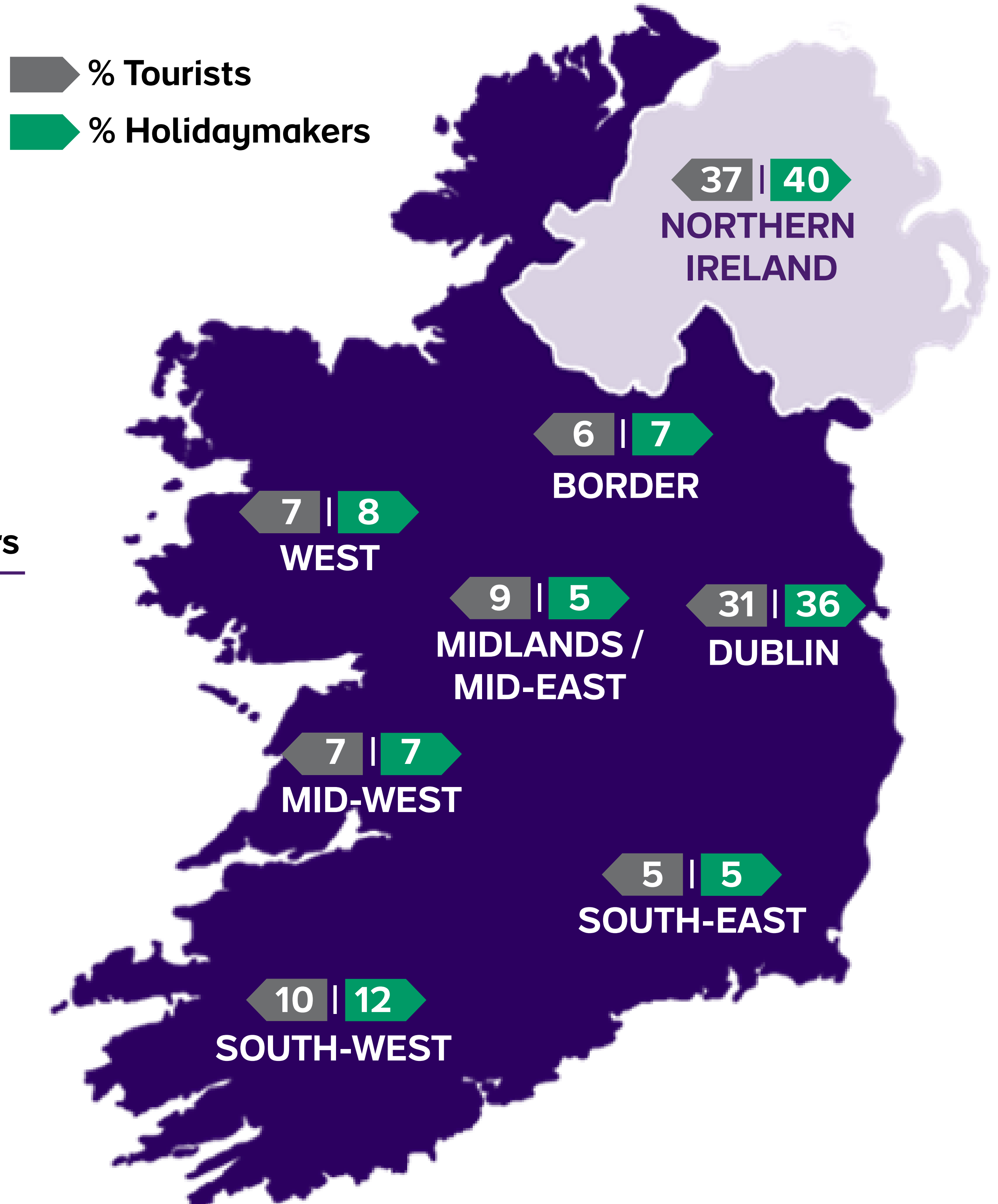
INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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

Almost 125,000 British tourists and 49,000 holidaymakers overnighted on both sides of the border.

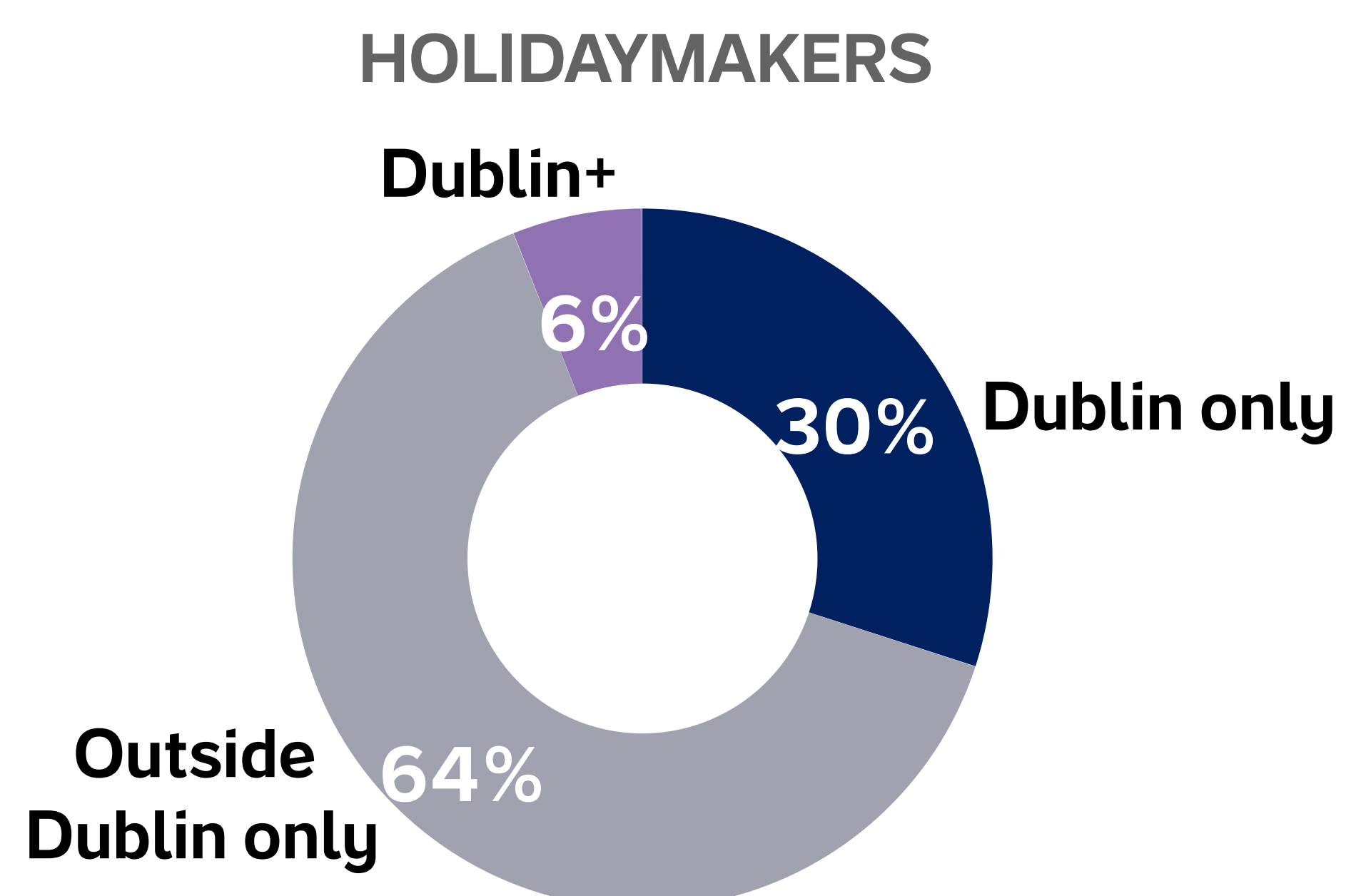
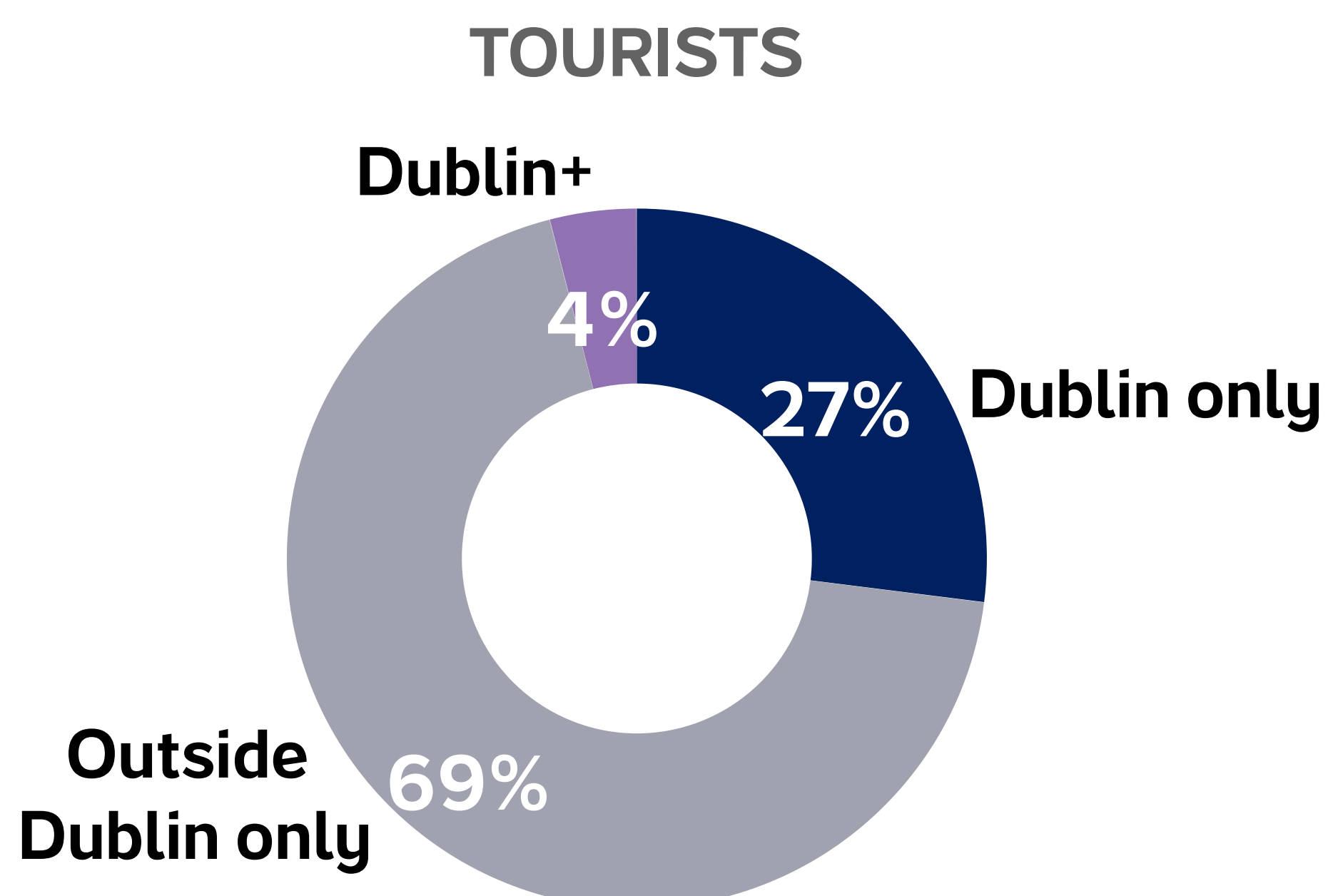
Rank	Tourists	Holidaymakers
#1	Northern Ireland	Northern Ireland
#2	Dublin	Dublin
#3	South-West	South-West



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

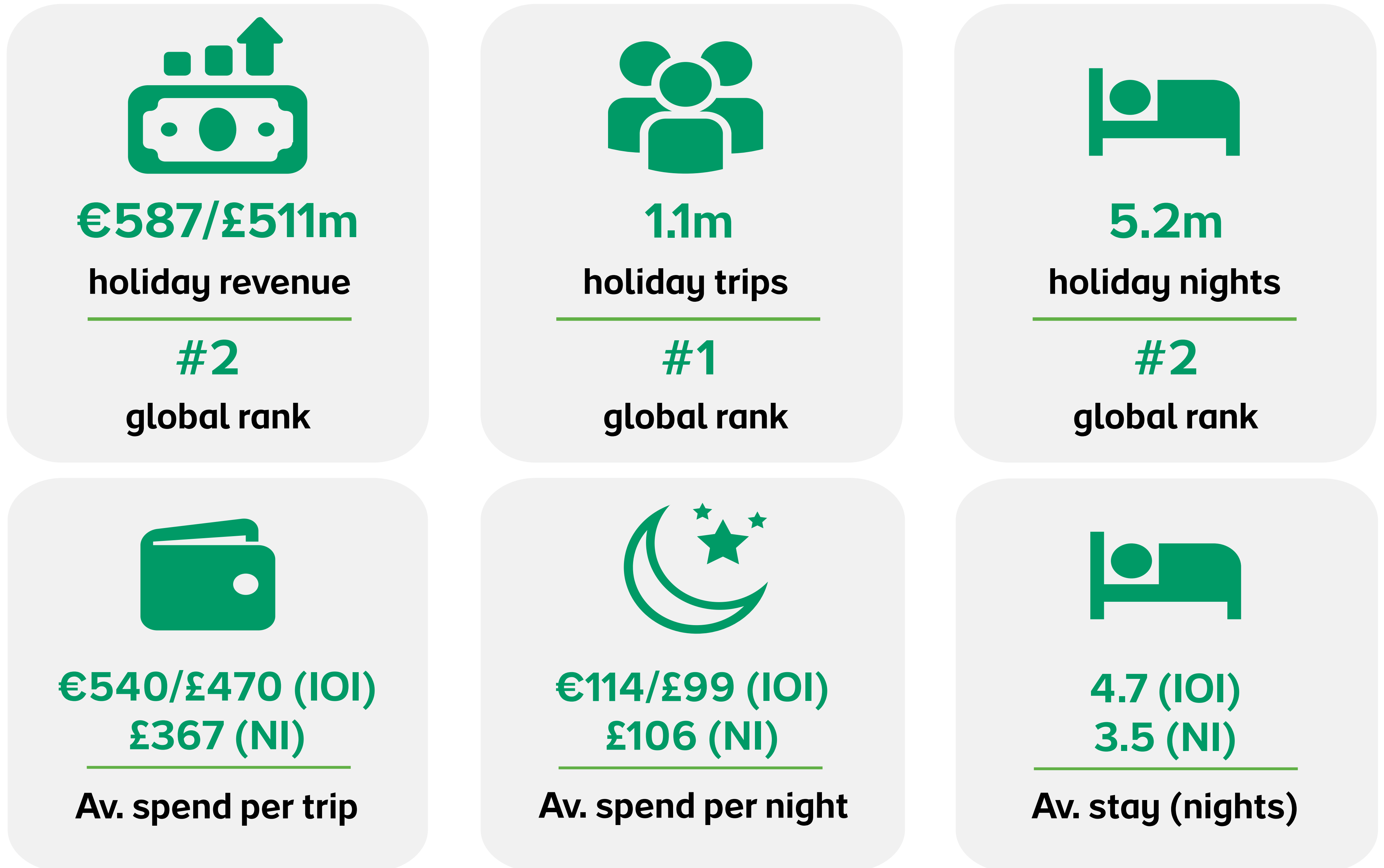
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

The majority of British tourists (69%) and holidaymakers (64%) overnighted in areas outside Dublin on their trip, driven by overnights in Northern Ireland (37% of tourists, 40% of holidaymakers).



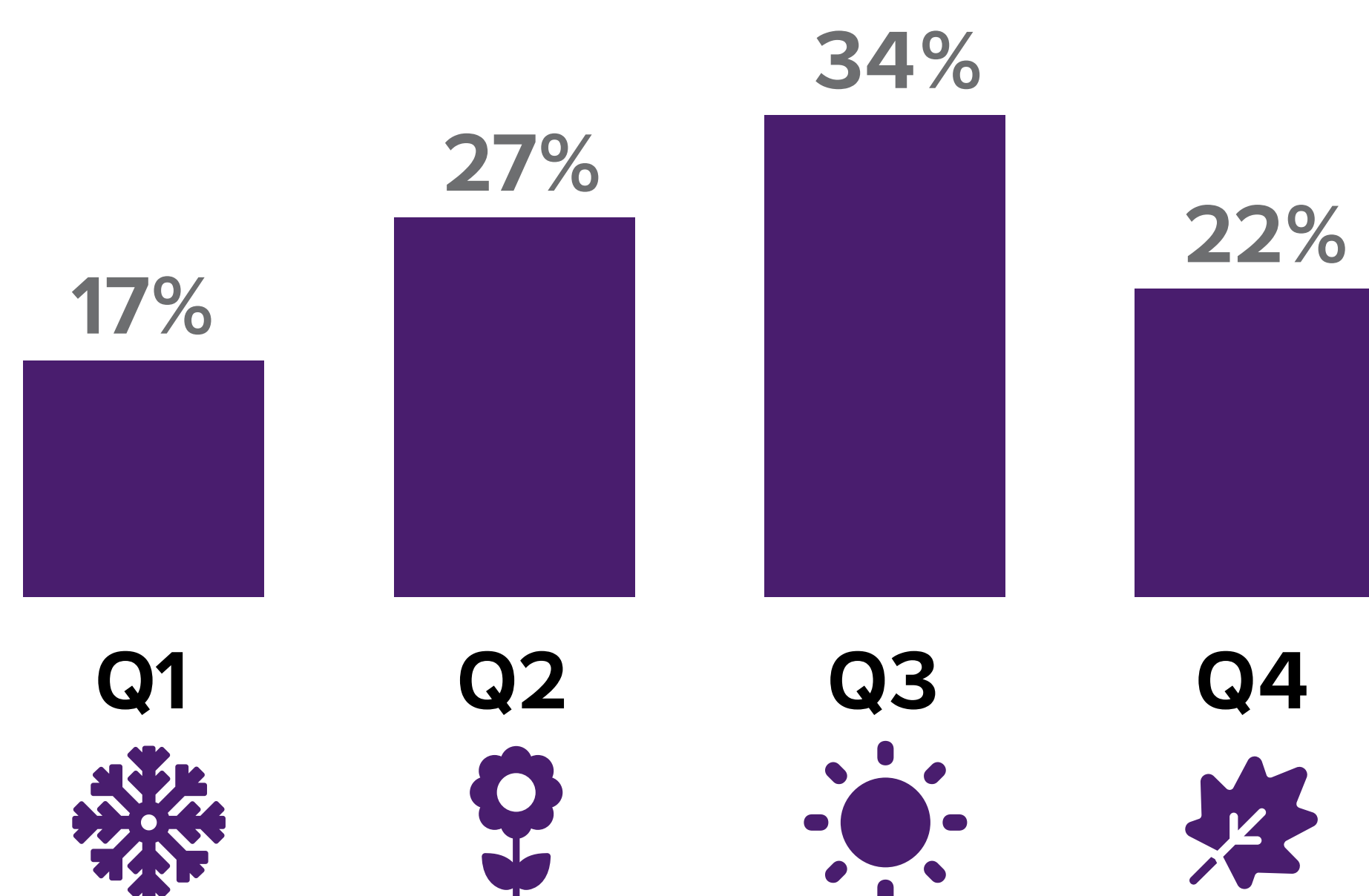
INBOUND HOLIDAYMAKERS

Great Britain was the island of Ireland’s largest source of holidaymakers (34%) and second-largest source of overseas holiday revenue (19%) and holiday nights (25%). British holidaymakers typically visited the island for a short break, spending an average of 4.7 nights on the island of Ireland. British holidaymakers who visited Northern Ireland stayed 3.5 nights on average.



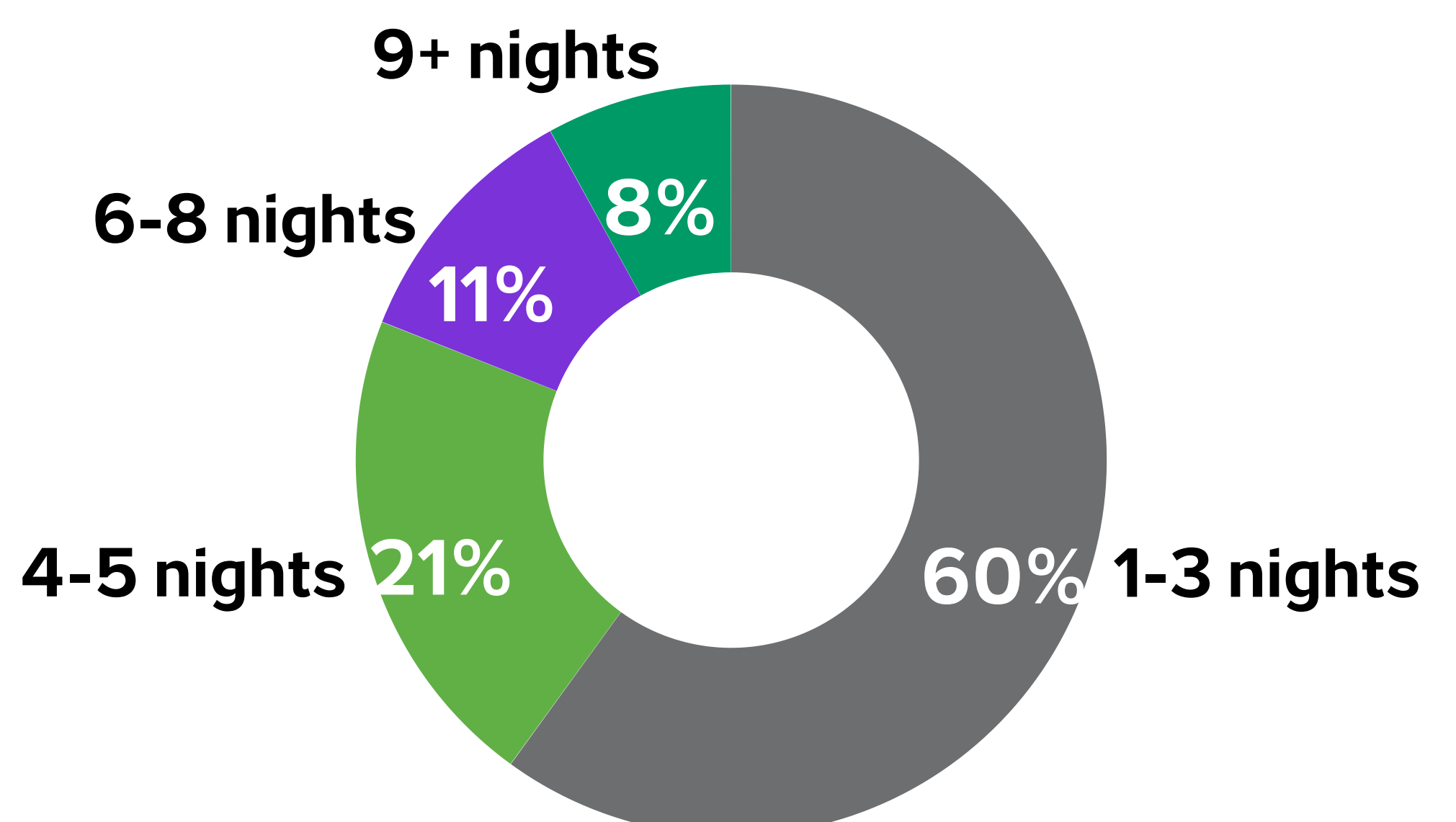
WHEN DID OUR HOLIDAYMAKERS VISIT?

Two-fifths (39%) of British holidaymakers visited during Q1 and Q4 (January - March and October - December).



HOW LONG DID OUR HOLIDAYMAKERS STAY?

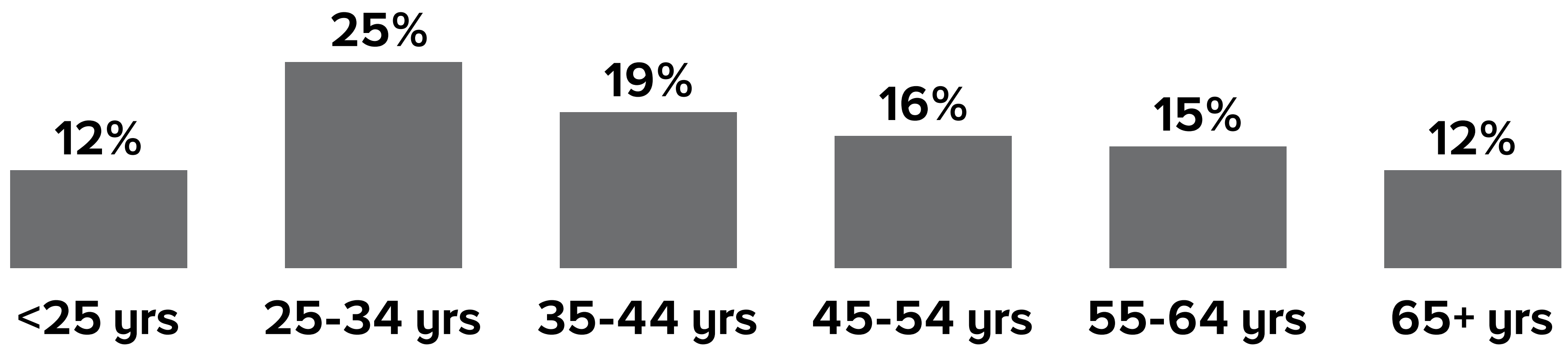
The majority (60%) of British holidaymakers stayed up to three nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

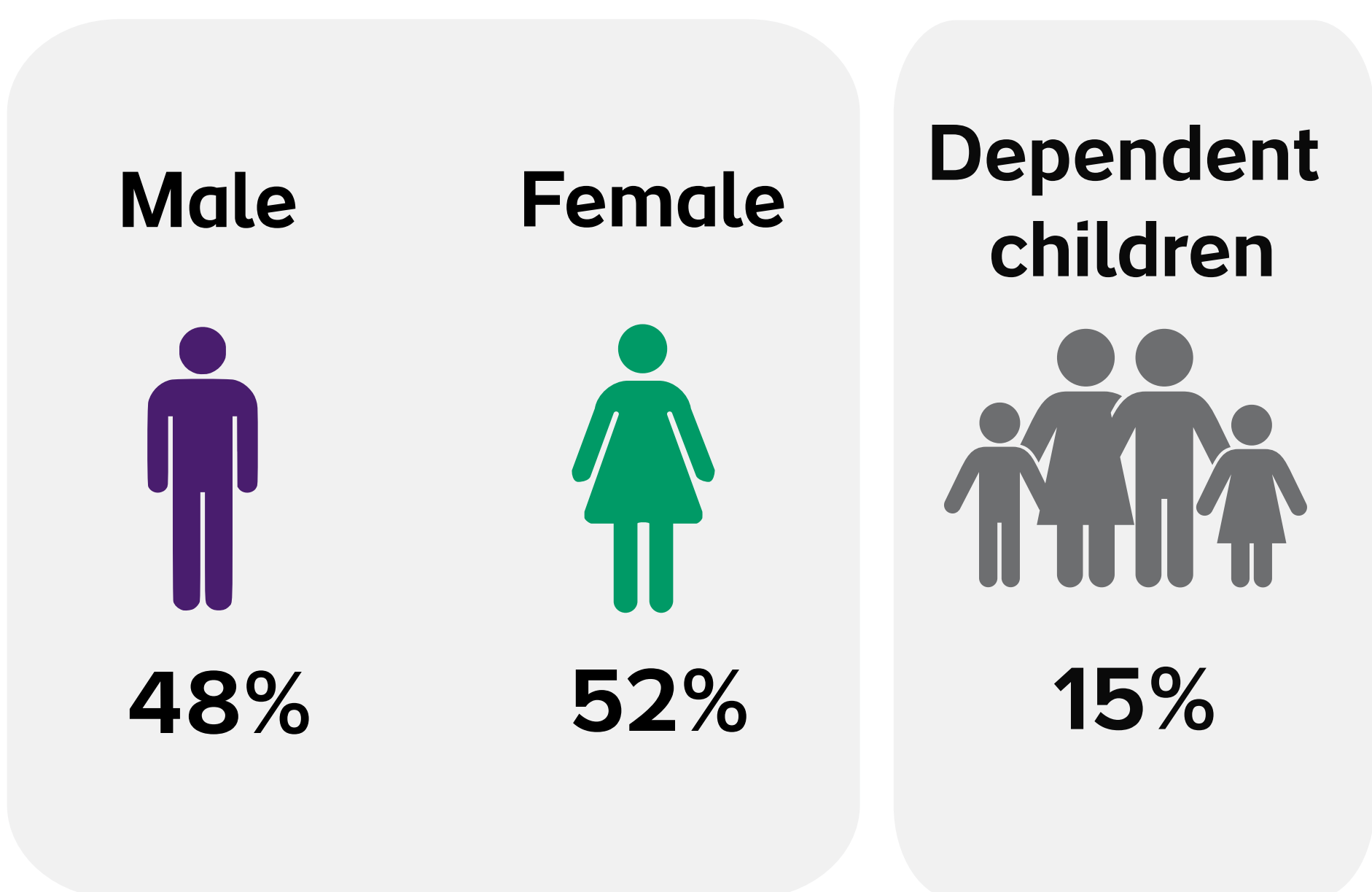
WHAT AGE WERE OUR HOLIDAYMAKERS?

Around two-fifths (44%) of British holidaymakers were 25 - 44 years old.



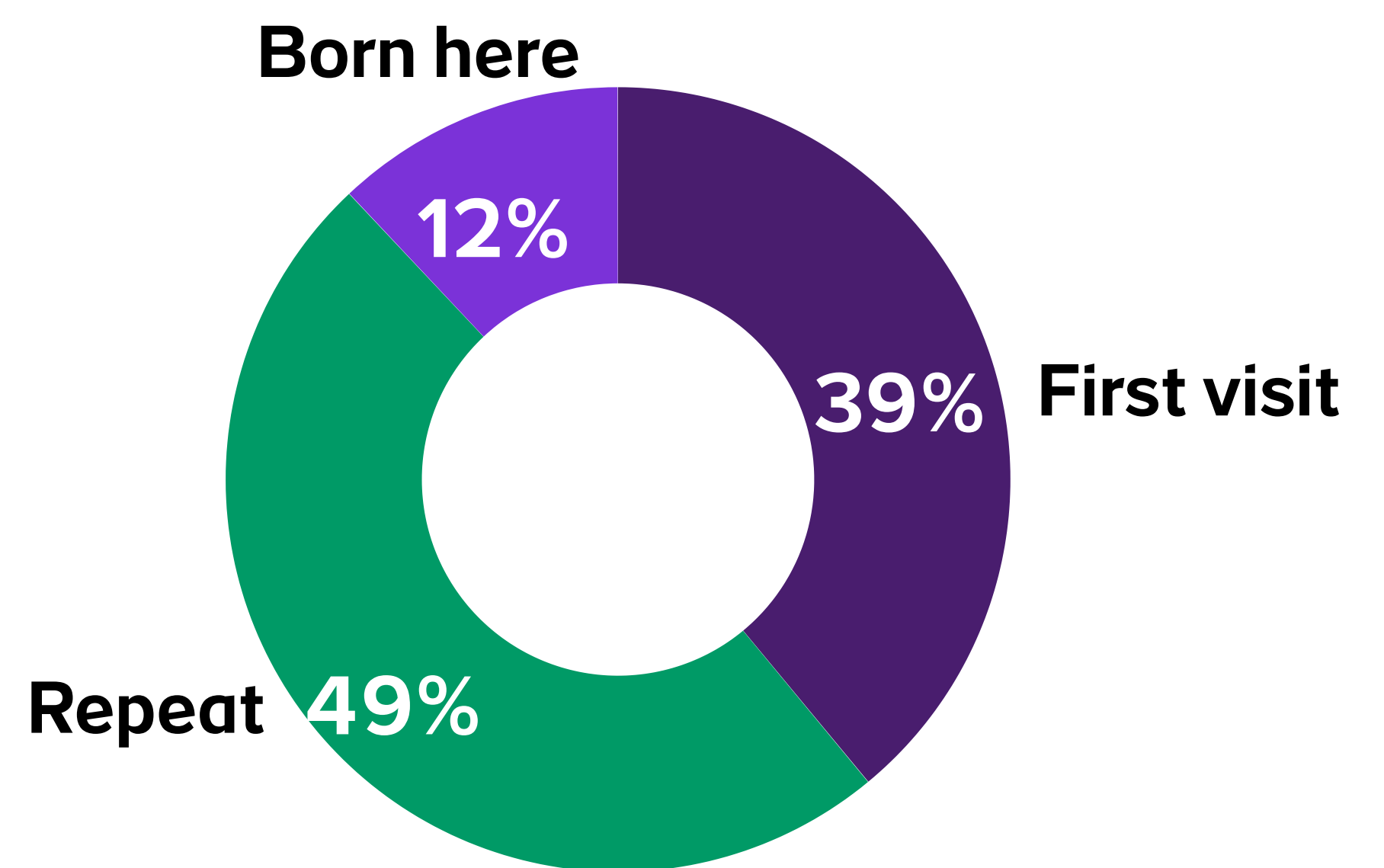
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

A minority (15%) of British holidaymakers visiting the island of Ireland had dependent children in the household (whether empty nesters or pre-children).



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

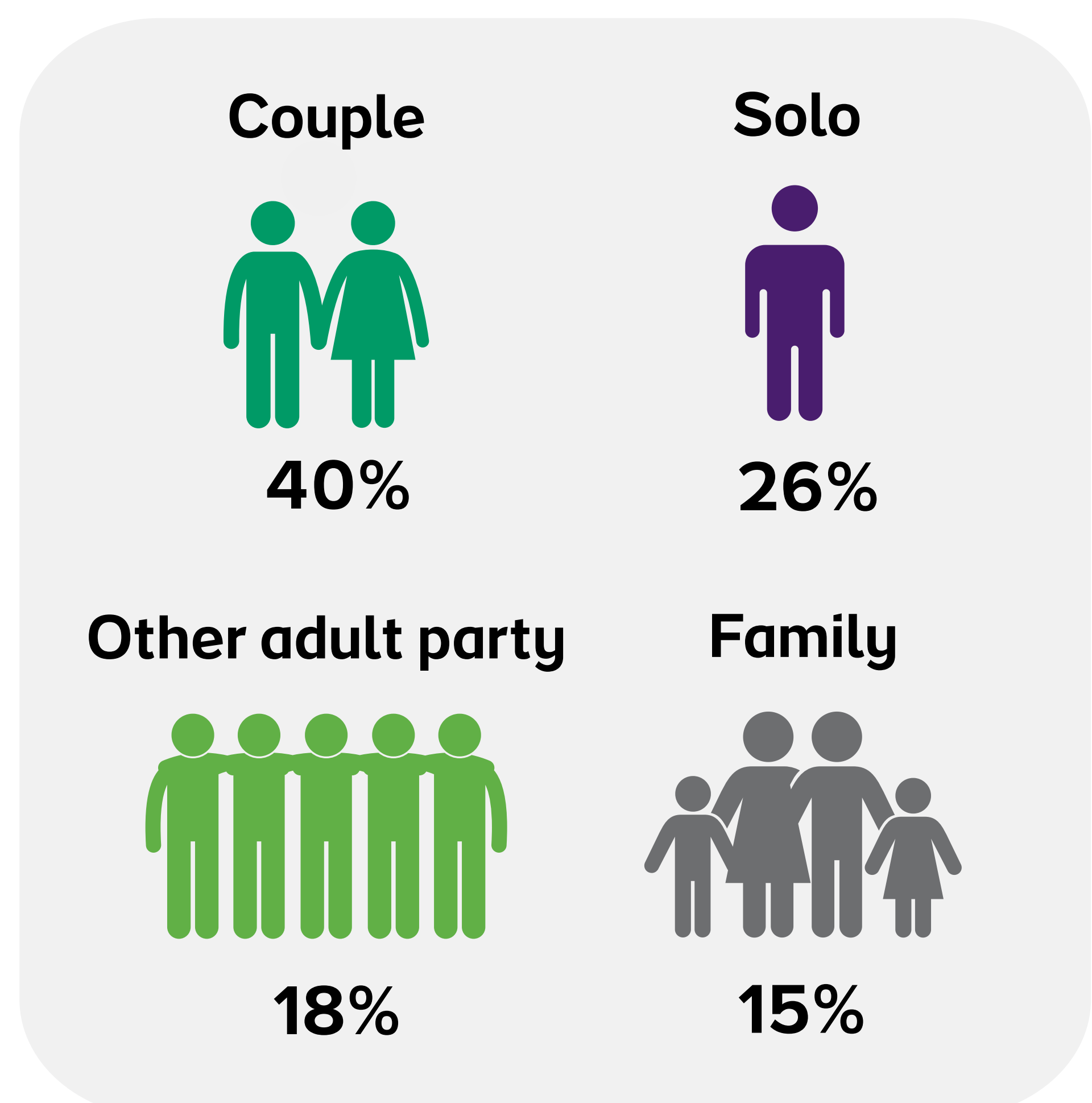
Half (49%) of British holidaymakers had previously visited while one-in-eight (12%) were born on the island of Ireland.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Two-fifths (40%) of British holidaymakers visited the island of Ireland with their partner/spouse.

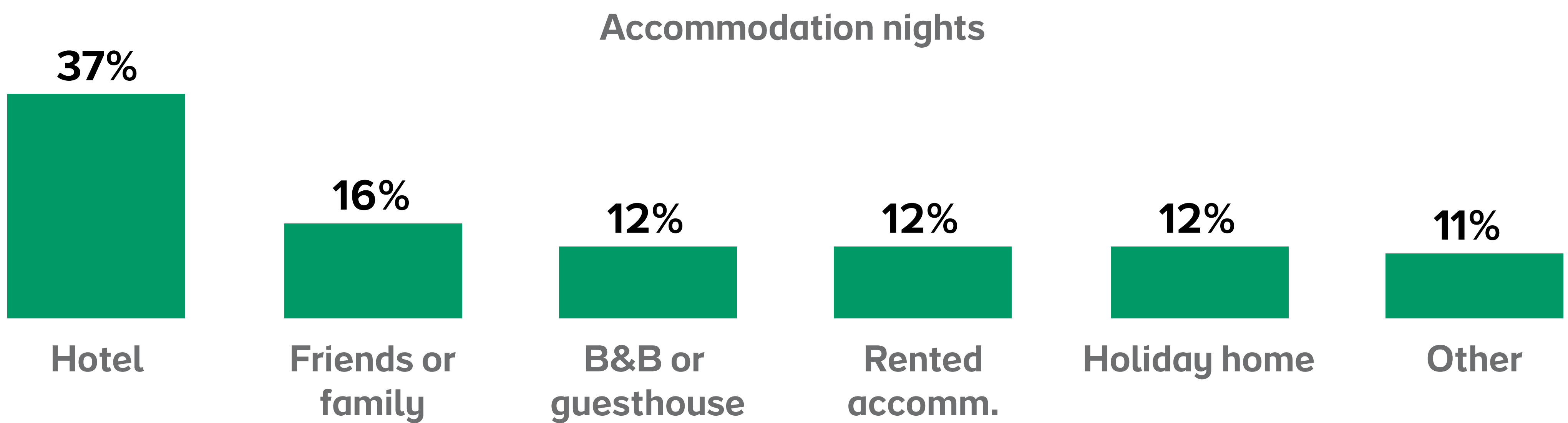
One-in-four (26%) travelled alone.



INBOUND HOLIDAYMAKERS

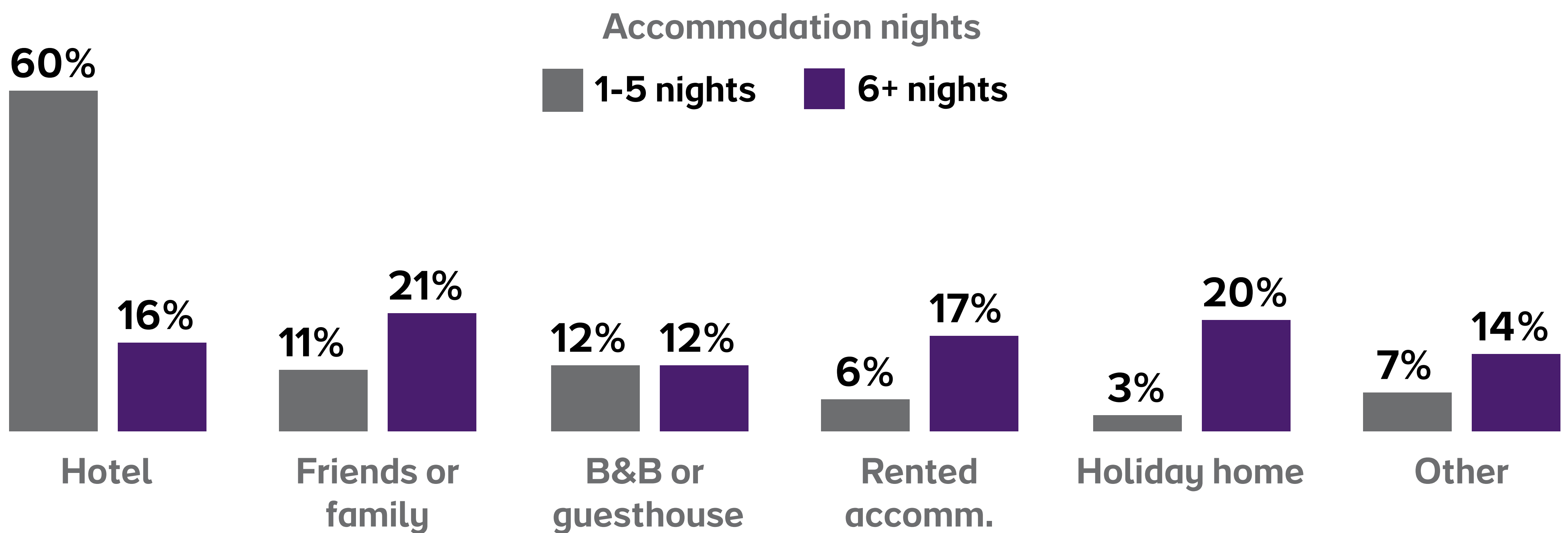
WHERE DID OUR HOLIDAYMAKERS STAY?

Almost two-fifths (37%) of nights stayed by British holidaymakers were in hotels, while around one-in-six (16%) nights were spent with friends or family.



HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?

Hotels (60%) are especially popular among British holidaymakers on short breaks (1 - 5 nights) while staying with friends and family (21%), holiday homes (20%) and rented accommodation (17%) are more popular among longer-staying holidaymakers.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

The majority (94%) of British holidaymakers travelled independently and over a third (34%) used a car while on the island of Ireland.



94%
Travelled
independently



6%
Travelled as
part of a
package

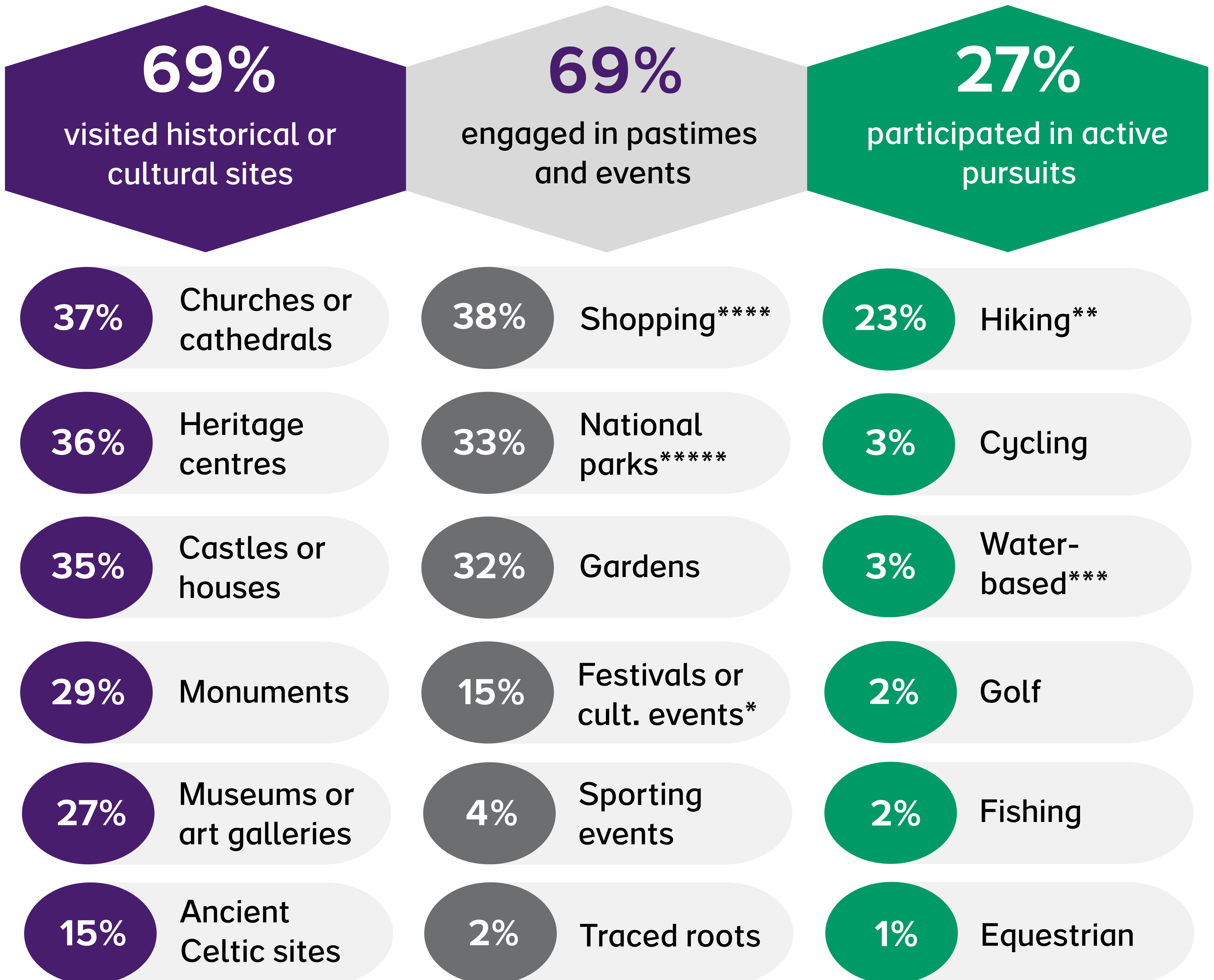


34%
Used a car
16% Brought
13% Rented
5% Borrowed

INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

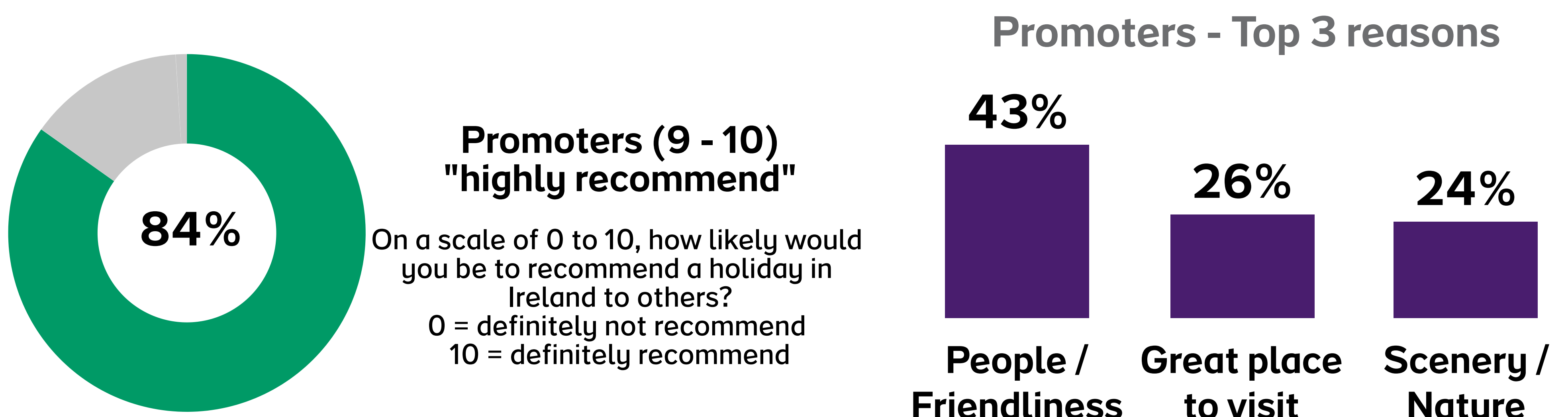
British holidaymakers are engaged tourists. They explored our historical sites and engaged in multiple pastimes while on the island of Ireland.



*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 vast majority (84%) of British holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (43%), that it's generally a great place to visit (26%) and our scenery and nature (24%).

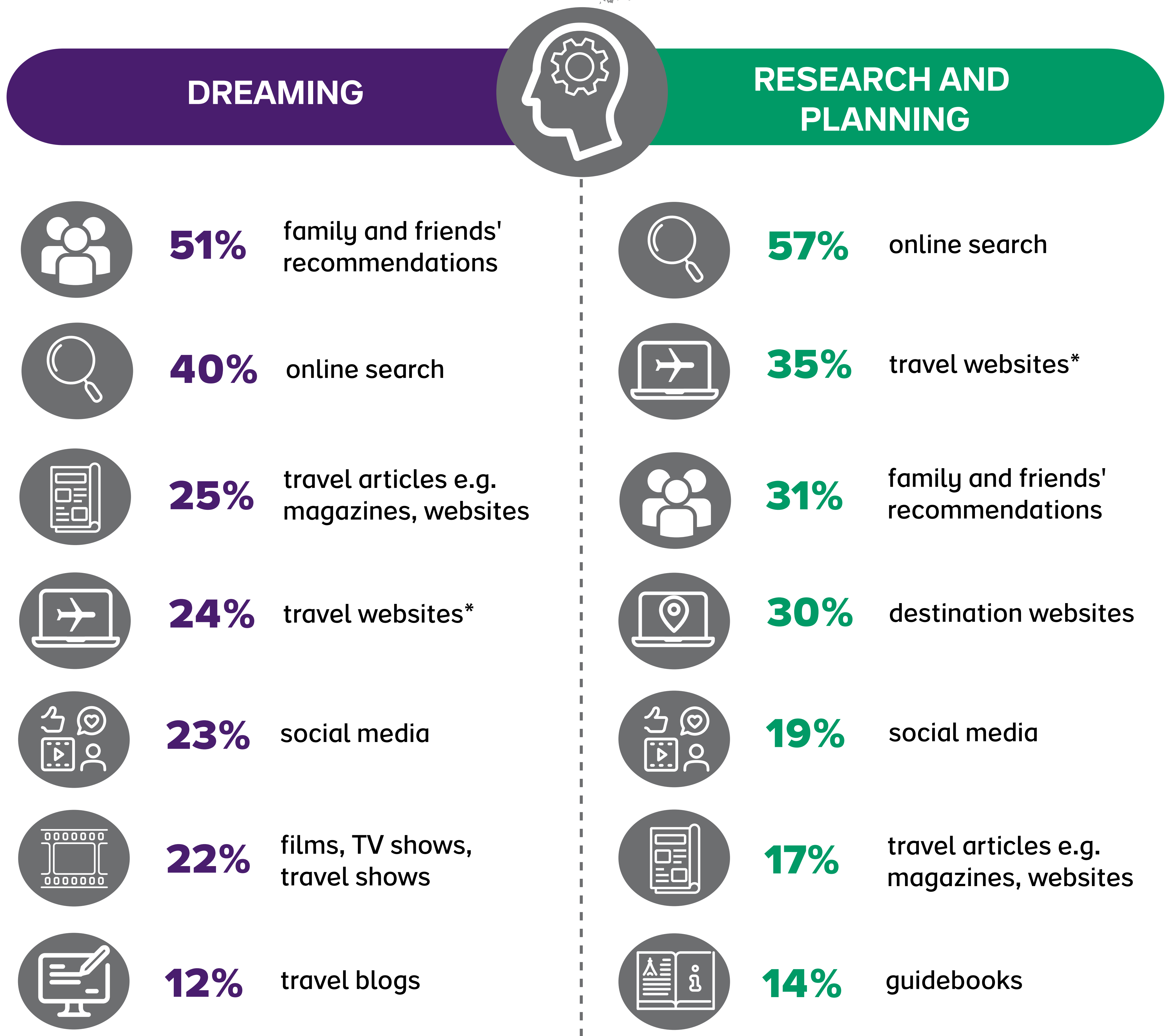


OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from Great Britain use multiple sources of inspiration when choosing a holiday destination, including family and friends' recommendations and general online searches.

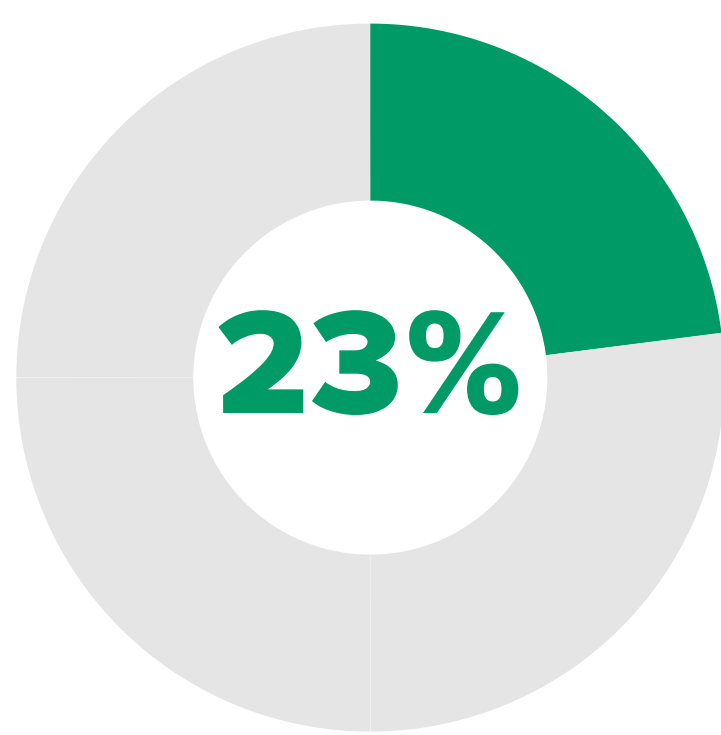
While social media, for example, is cited in its own right, it's often also a channel for the discovery of travel articles and recommendations.



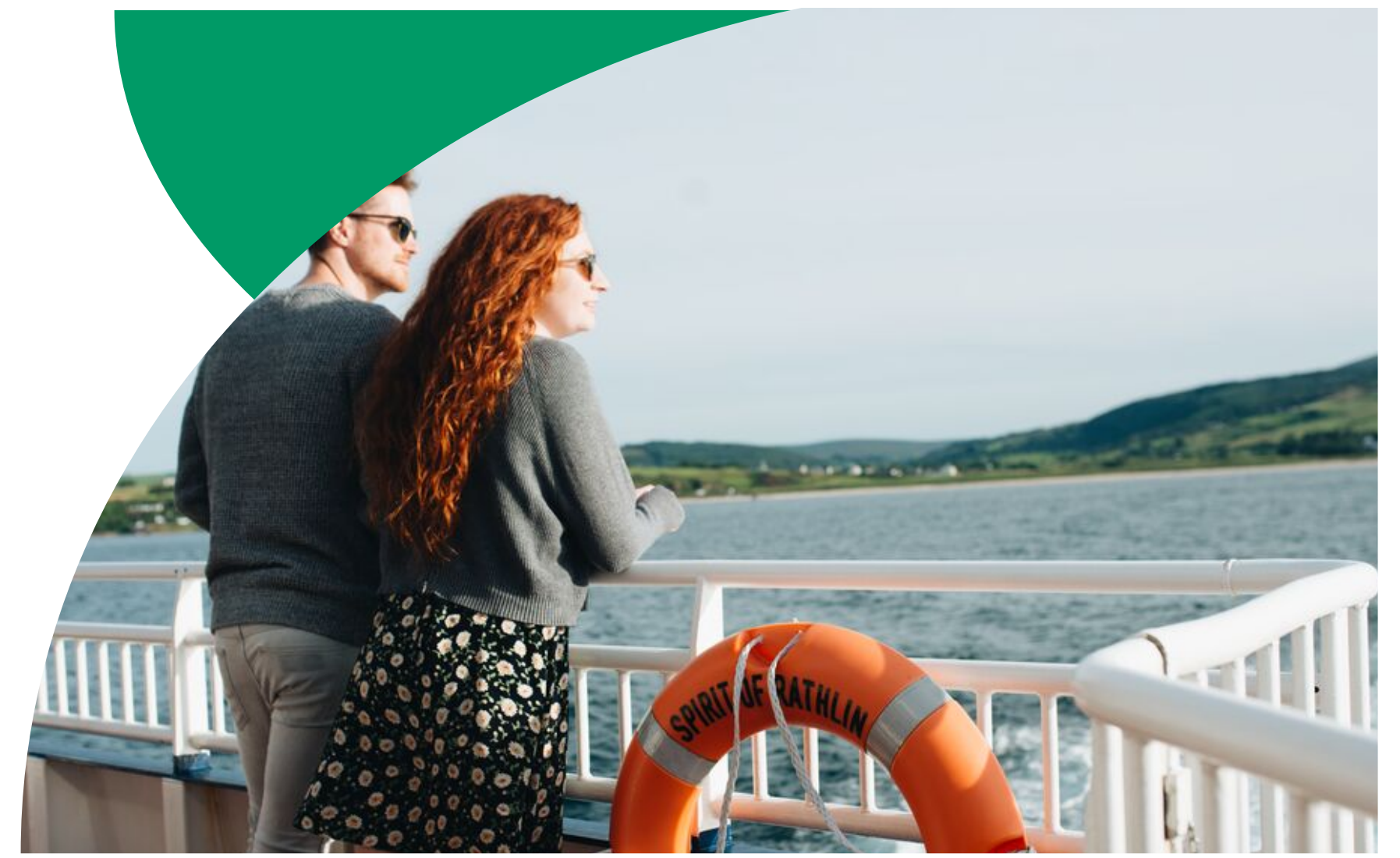
*Travel websites include company websites and booking platforms

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

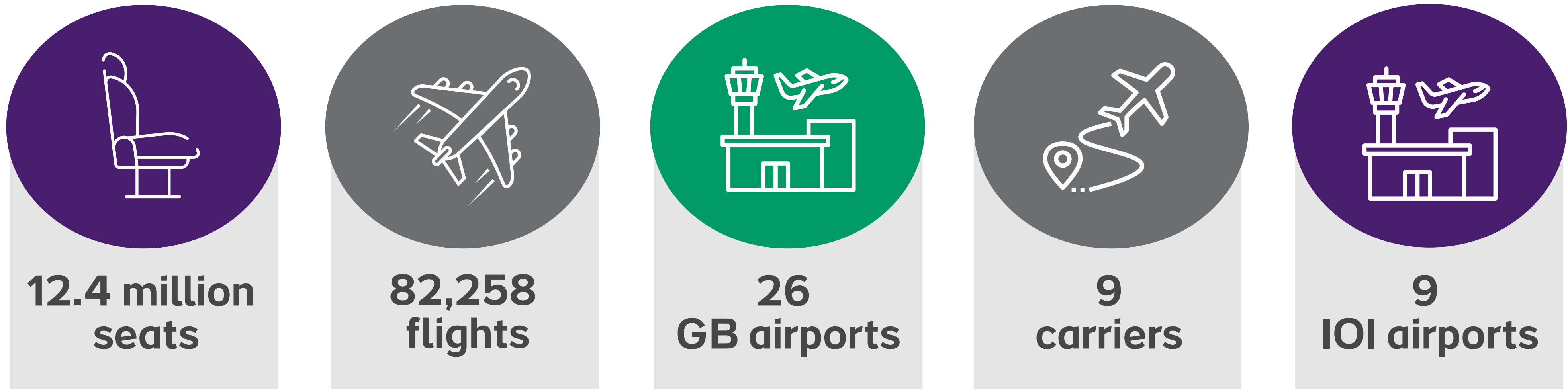
- 1  To feel connected to nature
- 2  To broaden and stimulate my mind
- 3  To feel the character of the place and people
- 4  To appreciate historical/modern architecture
- 5  To experience the vibrancy of the place and people
- 6  To experience living like a local
- 7  To enjoy authentic moments with 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

Great Britain was the world's third-largest outbound market in 2023 and 79% of all outbound trips from Great Britain were to other parts of Europe.

ACCESS BY AIR

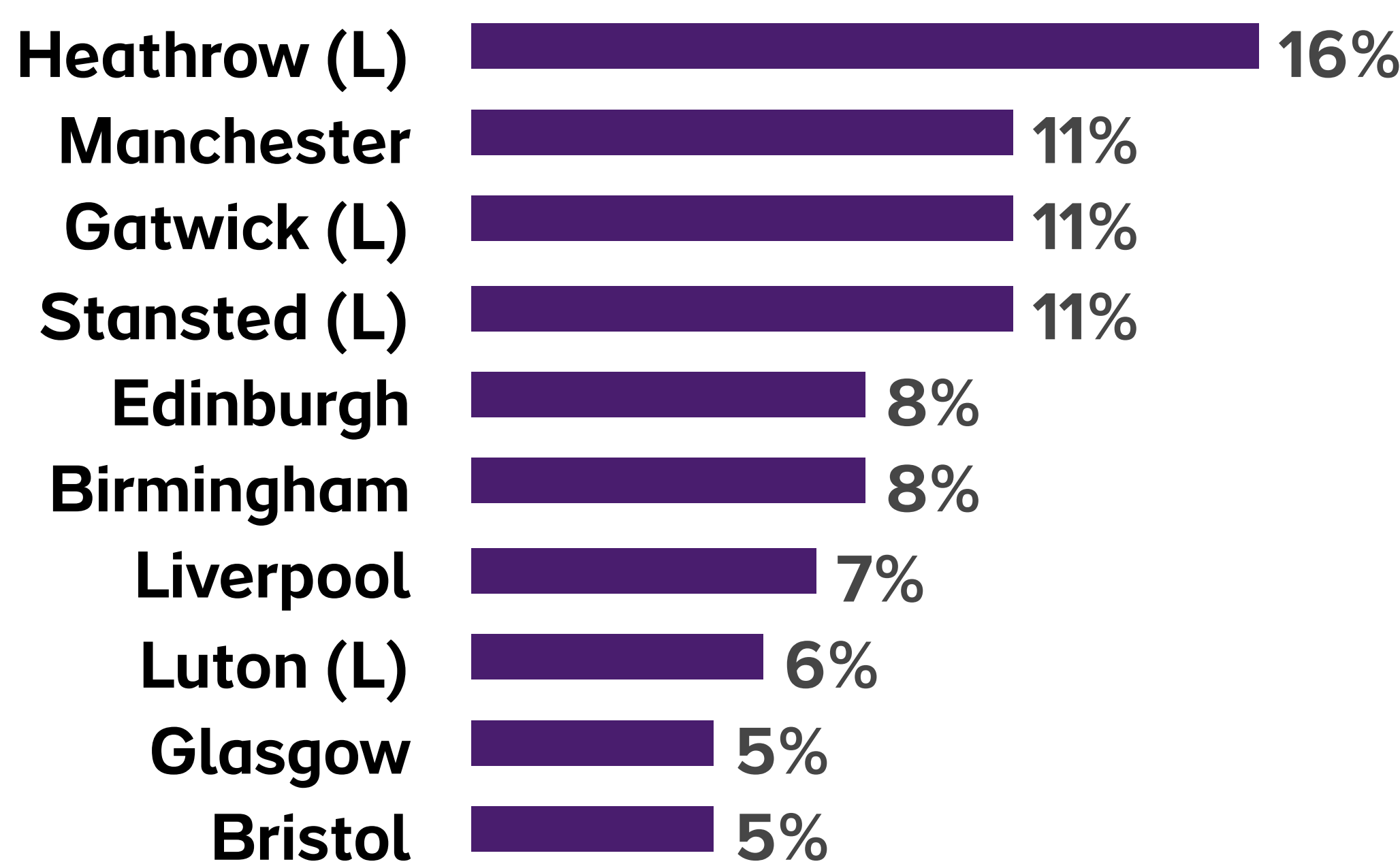
There were 12.4 million direct one-way air seats available on over 82,000 flights from Great Britain to the island of Ireland in 2023. There were 26 gateways from Great Britain to airports on the island of Ireland.



WHERE CAN OUR TOURISTS FLY FROM?

The top ten British airports accounted for the majority (87%) of seats in 2023. Around two-fifths (43%) of seats were delivered by four London-based airports (Heathrow, Gatwick, Stansted, Luton).

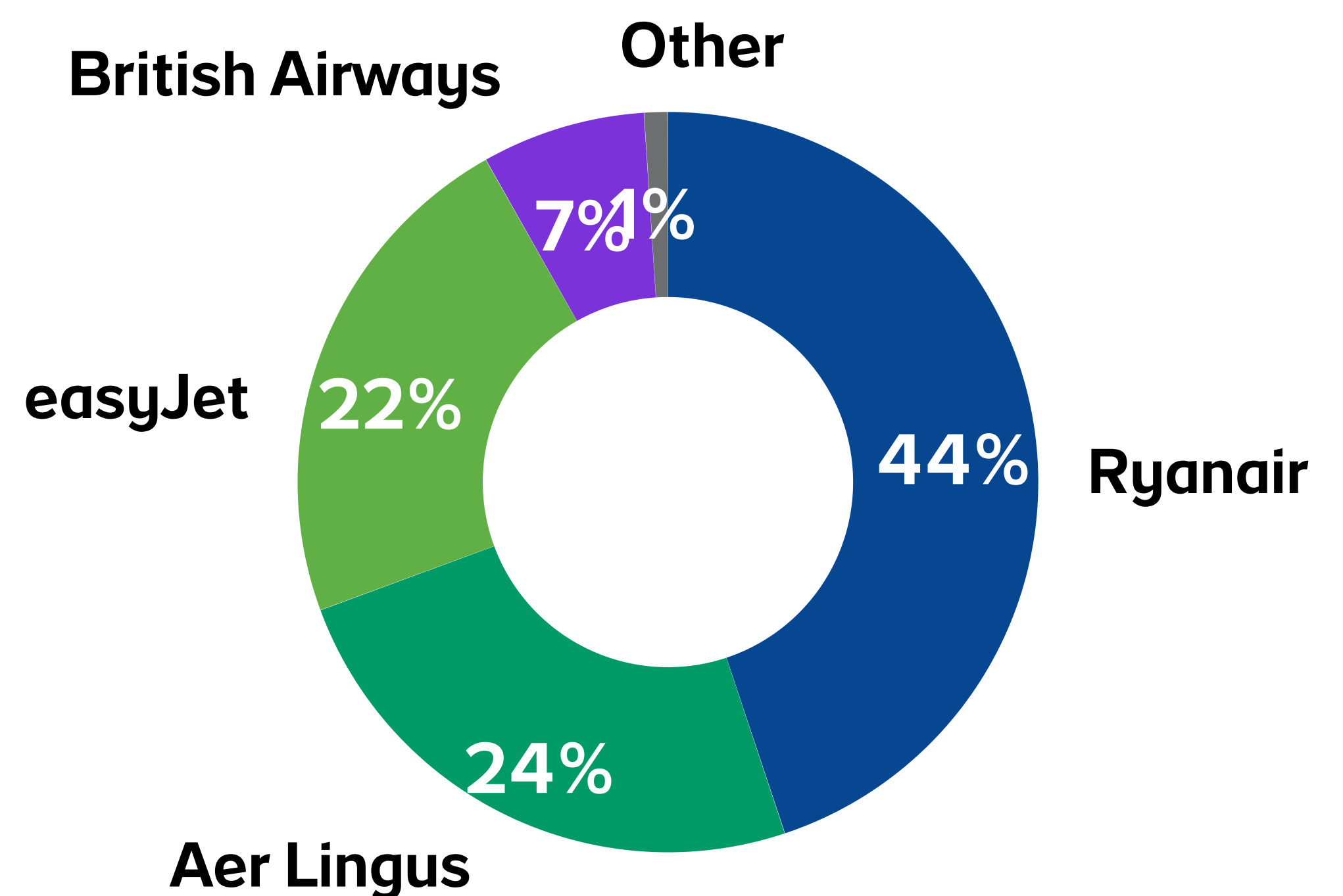
Share of seats by airport (Top 10)



WHO CAN OUR TOURISTS FLY WITH?

Nine carriers operated between Great Britain and the island of Ireland. In 2023, around nine-in-ten (91%) seats were delivered by Ryanair (44%), Aer Lingus (24%) and easyJet (22%).

Share of seats by carrier



ACCESS BY SEA

