

UK & Ireland Market Update 2025



THE GREAT
AMERICAN WEST



Market Demographics

- The USA remains the top outbound travel destination for the UK.
- The UK is the top European destination to the US. In 2024 over 4 million Brits travelled to the US, a 4% increase.
- Ireland's arrivals increased by 5.4% to 42,000
- Brits plan to take an average of three holidays in 2025, spending around £3,051.90
- 51% of millennials, 46% of Gen Xers, and 43% of boomers from the UK expect to take international holidays
- International travel spend from UK Households is projected to reach £63.4 billion in 2025



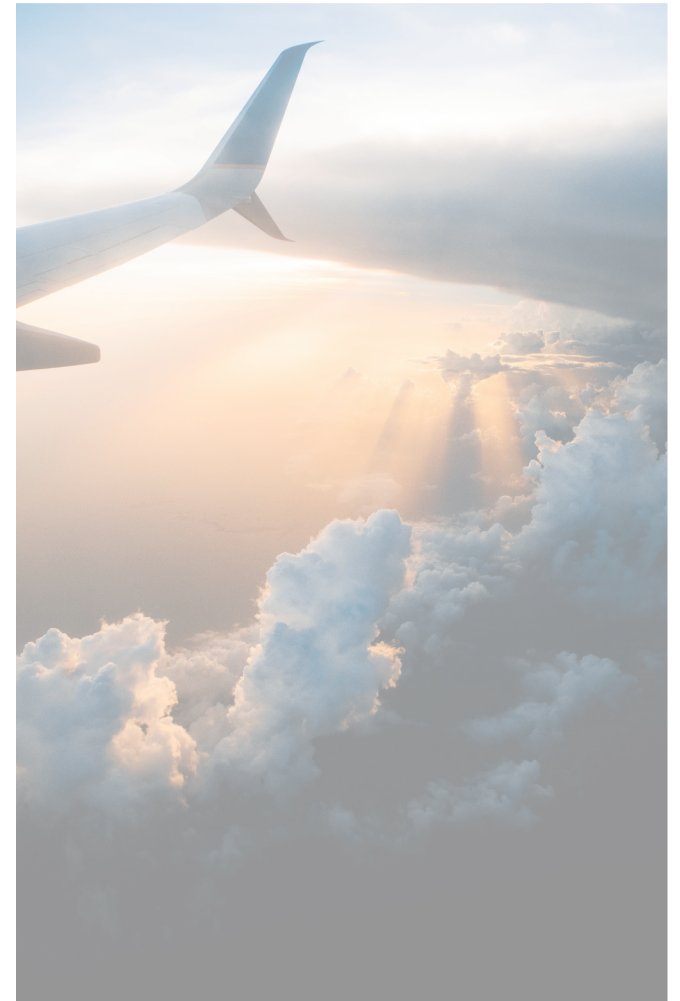
UK Market Update

- The UK economy grew by 0.9% in 2024
- The UK's inflation rate has accelerated to 3.0% in January 25 and fell to 2.8% in February.
- Interest rates have reduced to 4.5%
- Cost of living pressures continue in the UK
- Household energy bills are projected to rise by 6% from April 2025
- Consumer spending is projected to grow by 1.6% in 2025



UK Market Update

- Strong start for January and February 2025 for bookings
- Forward bookings for 2026 looking positive
- Increase in production for US 2024
- More demand for elevated experiences
- Ranches and more premium accommodation and itineraries
- Interest for the "road less travelled" US – GAW fits perfectly!
- Feedback from Tour ops at Unite say sales to US are static



Market Trends

- A preference for **authentic experiences** over conventional resorts and package deals
- **Nocturism** (nocturnal tourism) like stargazing.
- **Lesser-known destinations** are gaining popularity.
- “People are seeking places where they feel truly welcomed.”



Market Trends

- **Sustainability** has emerged as a key priority for UK travellers in 2025.
- **“Cooler holidays”** - Google Trends showing a 300% increase in searches
- **Solo Travel** is on the rise especially amongst 40–50-year-olds.
- **Quiet luxury** is popular, with travellers opting for unique accommodation
- **"New Heydays,"** noting that as millennials reach middle age, the vacations they loved in their youth will make a comeback.



The UK & Irish Traveller

- **Peak travel months** - March to April during the Spring break and June to August for the Summer holidays
- **Road Trips, nature, adventure city breaks, and cultural experiences** are some of the most popular themes for US trips
- **Significant disposable income** - increase in spend for leisure Travellers
- **Average length of stay** - 16 days or more



Thank you!!



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