

# BELGIUM

## MARKET PROFILE

### 2023



## INBOUND TOURISTS

The island of Ireland welcomed around 80,000 Belgian tourists who spent over €60/£52 million and stayed 565,000 nights.



### WHERE DID OUR TOURISTS VISIT?

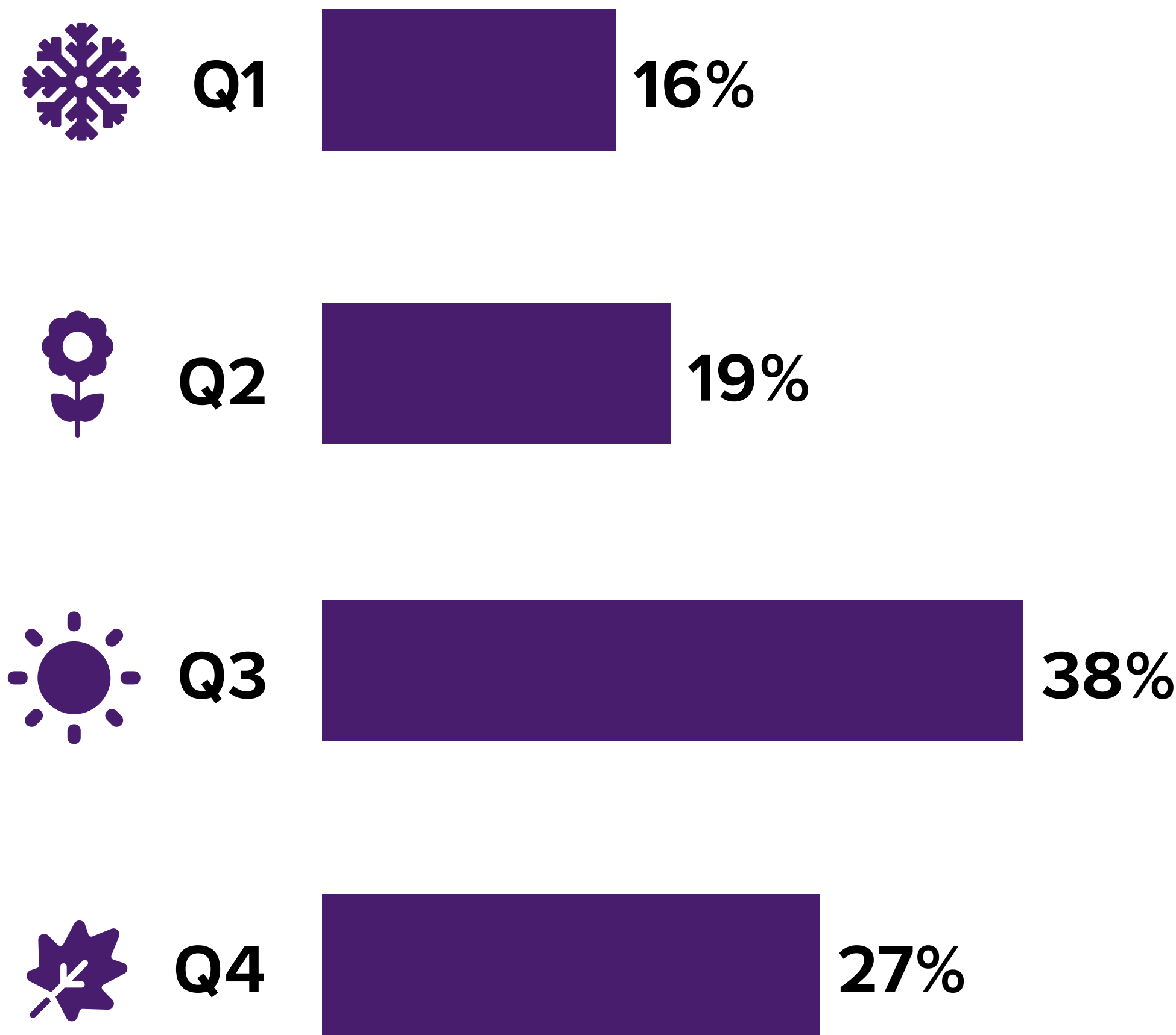
Of the Belgian tourists that visited the island, 8% overnighted in both Ireland and Northern Ireland.



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

### WHEN DID OUR TOURISTS VISIT?


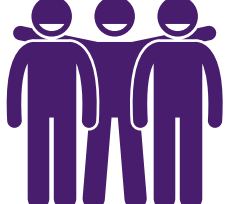


Over three-fifths (65%) of Belgian tourists visited the island during the second half of the year.



# INBOUND TOURISTS


## WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Almost half (47%) of Belgian tourists visiting the island of Ireland came for a holiday, accounting for 62% of Belgian tourism revenue. A fifth (20%) visited for business-related reasons, accounting for the second largest share (19%) of Belgian tourism revenue.

		REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
	HOLIDAY	€37/£33m	62%	37k	47%	279k	49%
	VFR	€7/£6m	12%	25k	31%	128k	23%
	BUSINESS	€12/£10m	19%	16k	20%	87k	15%
	OTHER	€4/£3m	7%	2k	3%	71k	13%


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

On average, Belgian tourists spent €750/£652 per trip or €107/£93 per night and stayed 7.0 nights on the island of Ireland.




€750/£652 (IOI)

Av. spend per trip



€107/£93 (IOI)

Av. spend per night









7.0 (IOI)

Av. stay (nights)

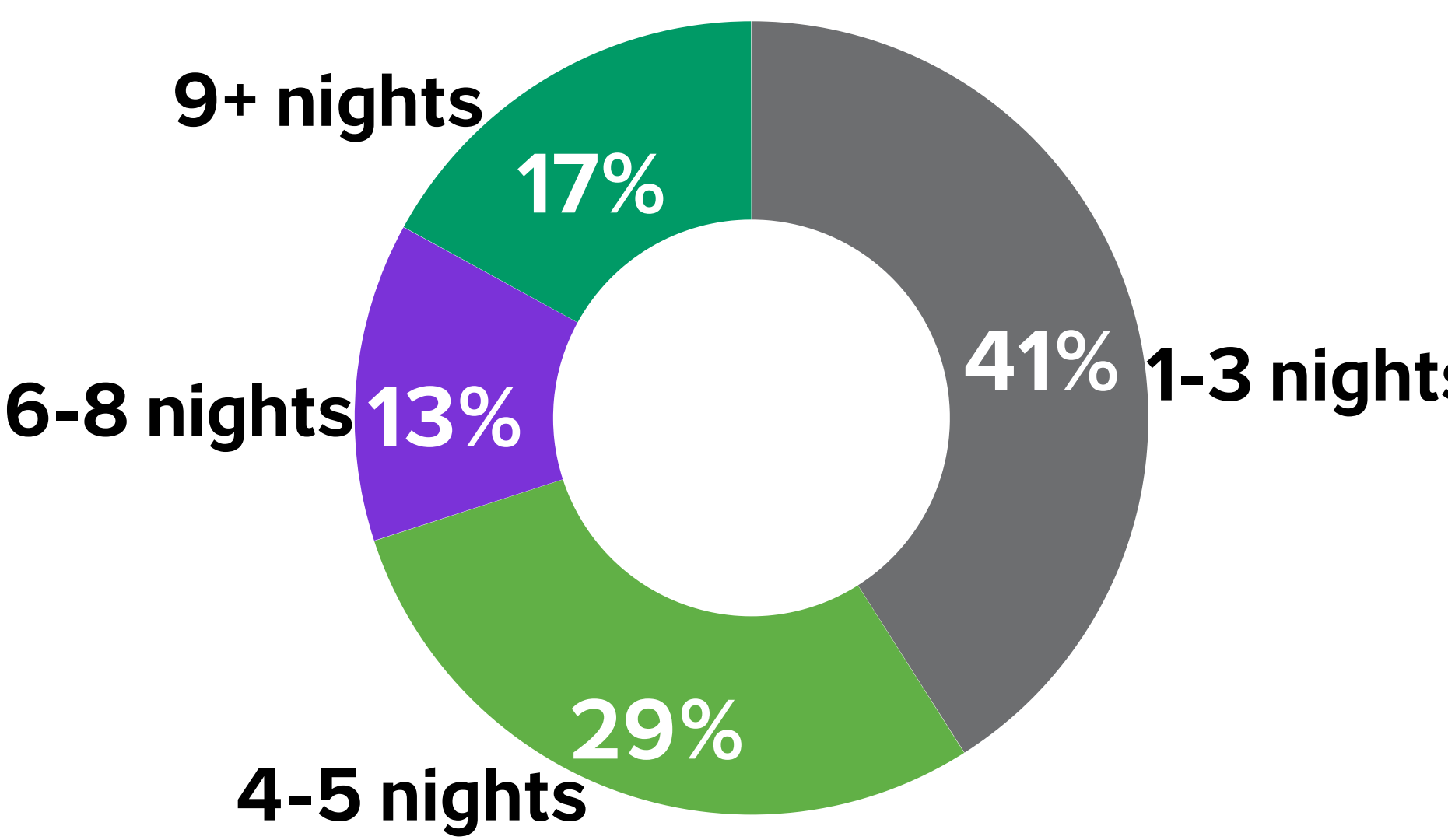
## HOW DID OUR TOURISTS SPEND THEIR MONEY?

Of the revenue generated from Belgian tourists, 36% was spent on accommodation.

Accomm.  36%	Food & Drink  33%	Shopping  12%
Transport  12%	Entertainment  6%	Misc.  1%

## HOW LONG DID OUR TOURISTS STAY?

Seven in ten (70%) stayed up to five nights on the island of Ireland.



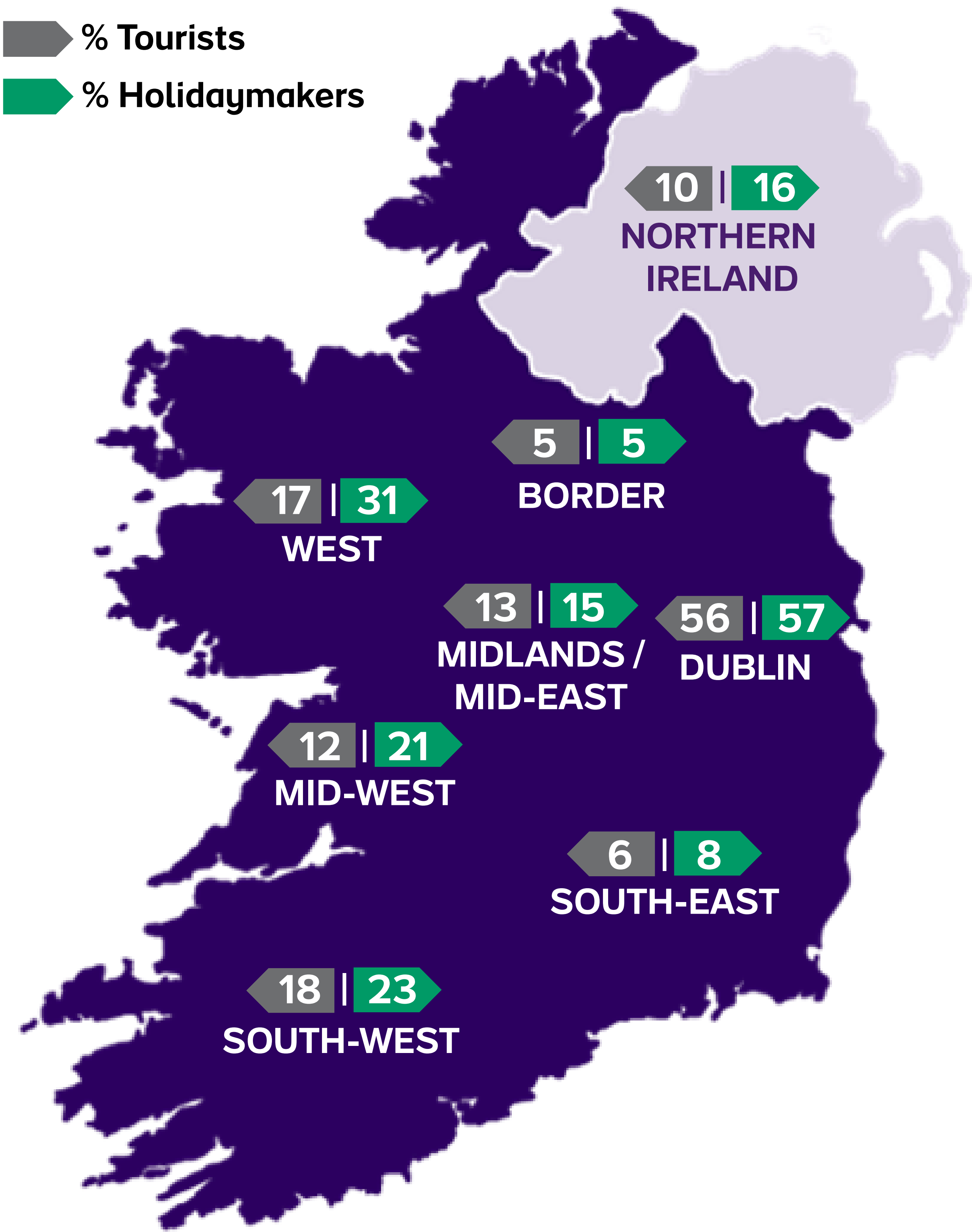


# INBOUND TOURISTS AND HOLIDAYMAKERS

## WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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

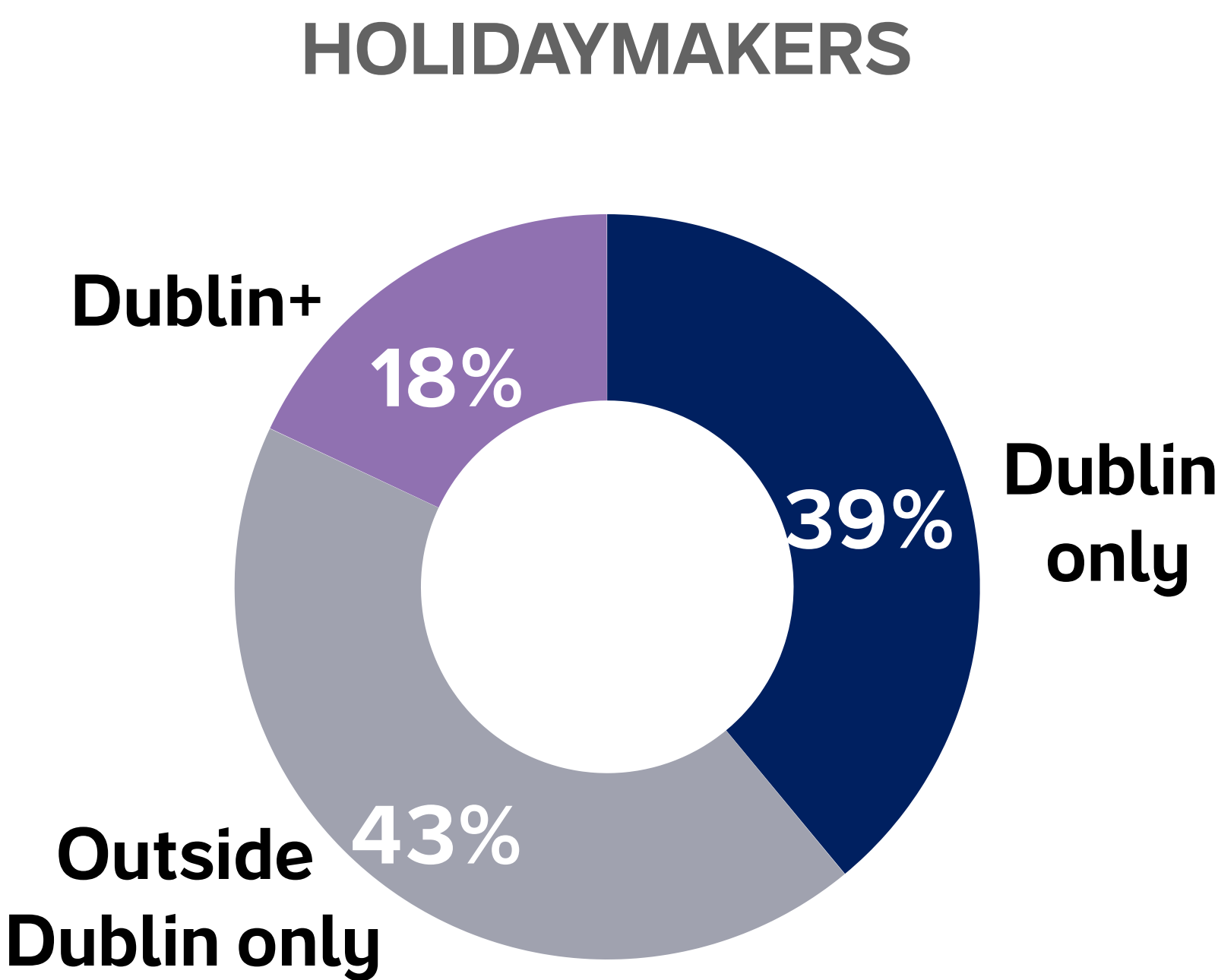
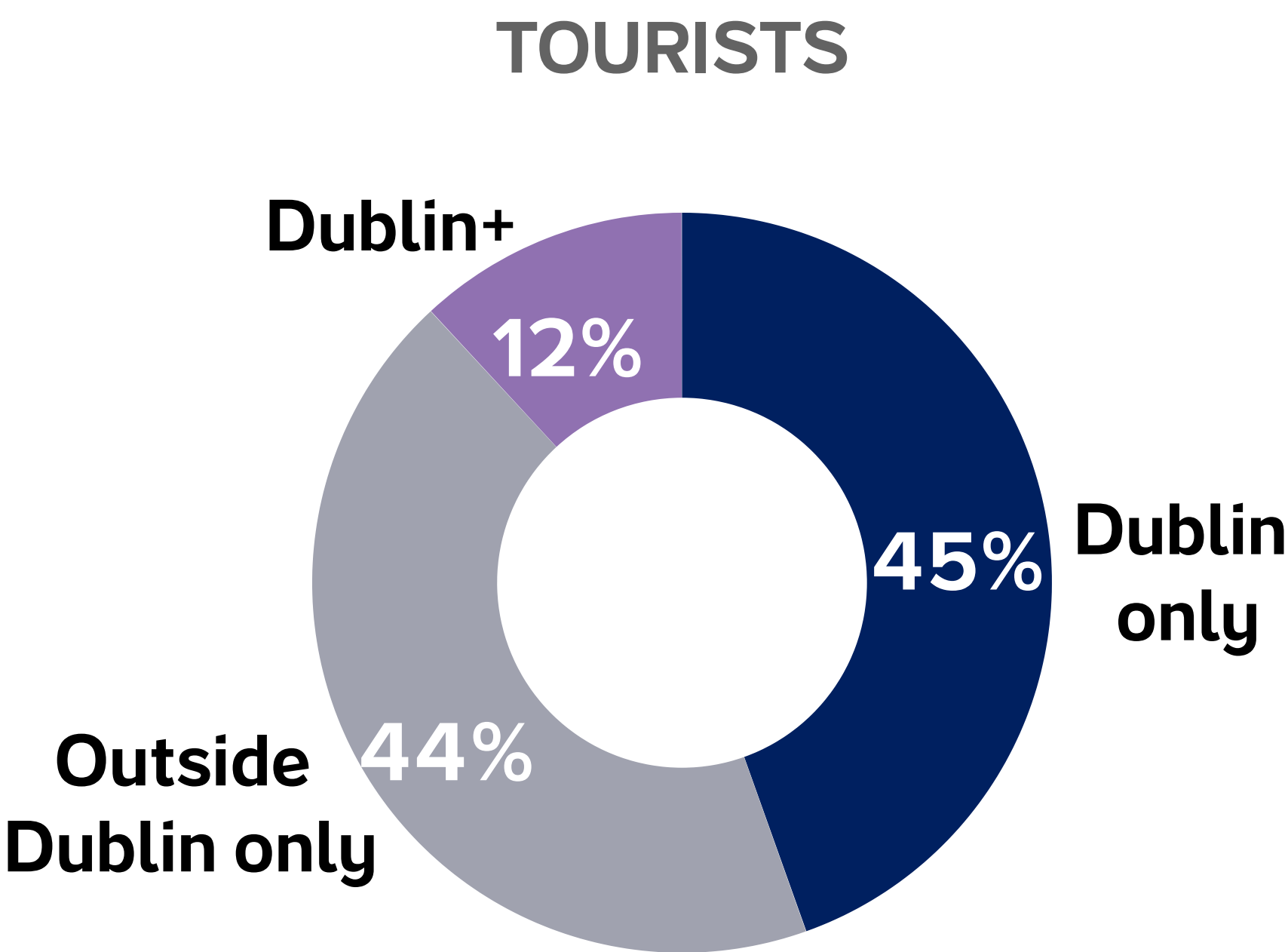
Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	South-West	West
#3	West	South-West



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

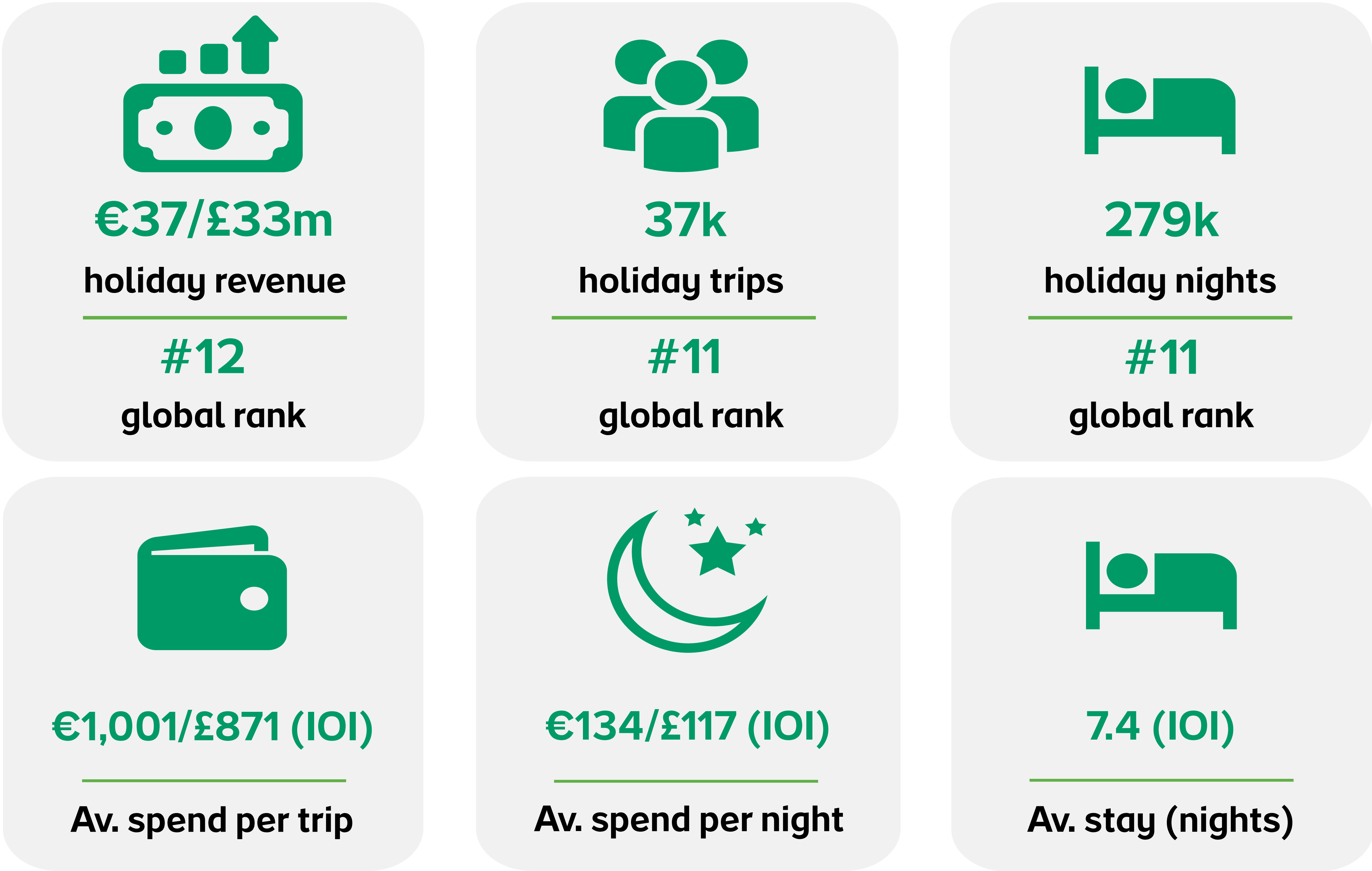
## WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of Belgian tourists (56%) and holidaymakers (57%).



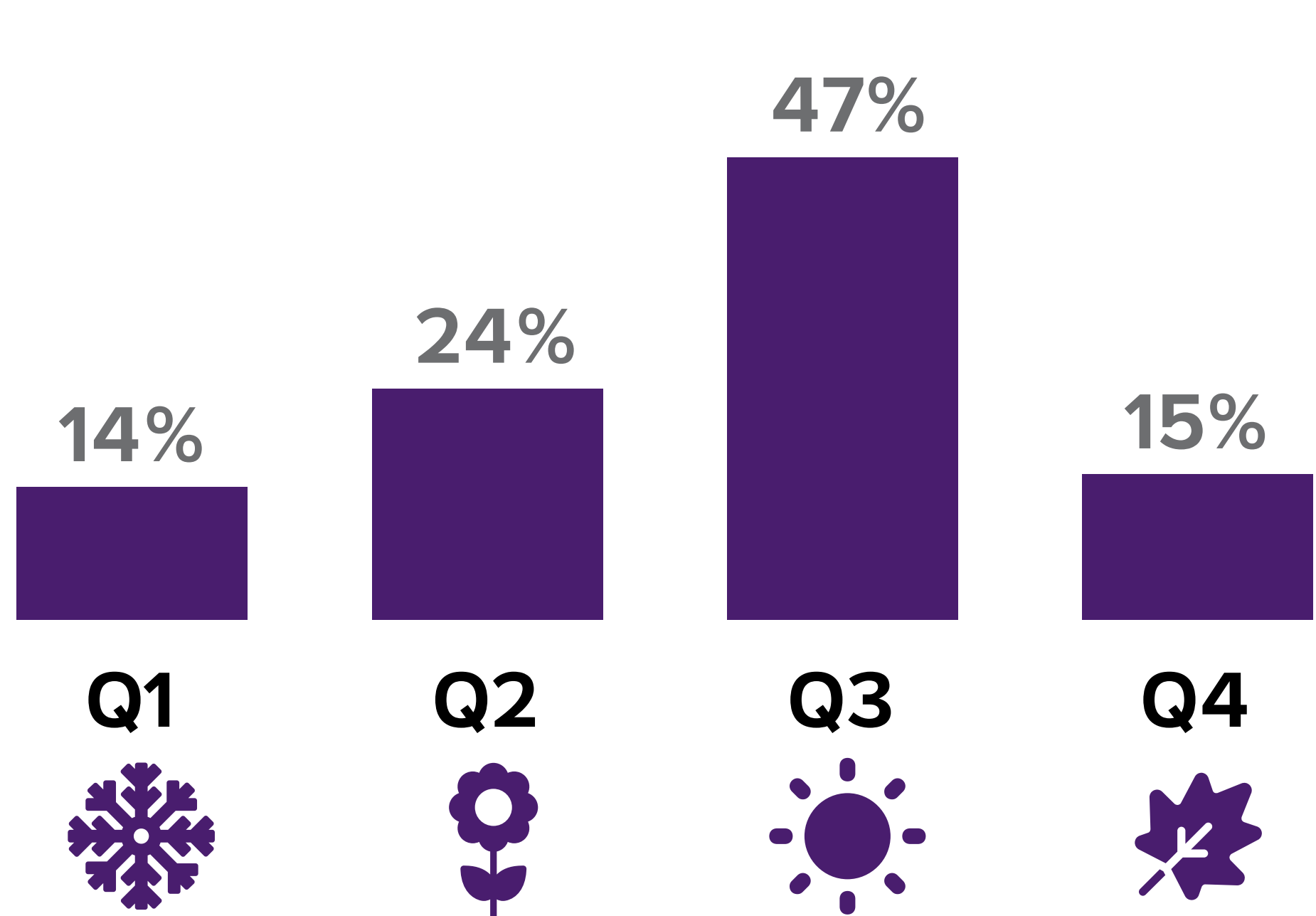
# INBOUND HOLIDAYMAKERS

Belgian holidaymakers stayed for an average of 7.4 nights on the island of Ireland.



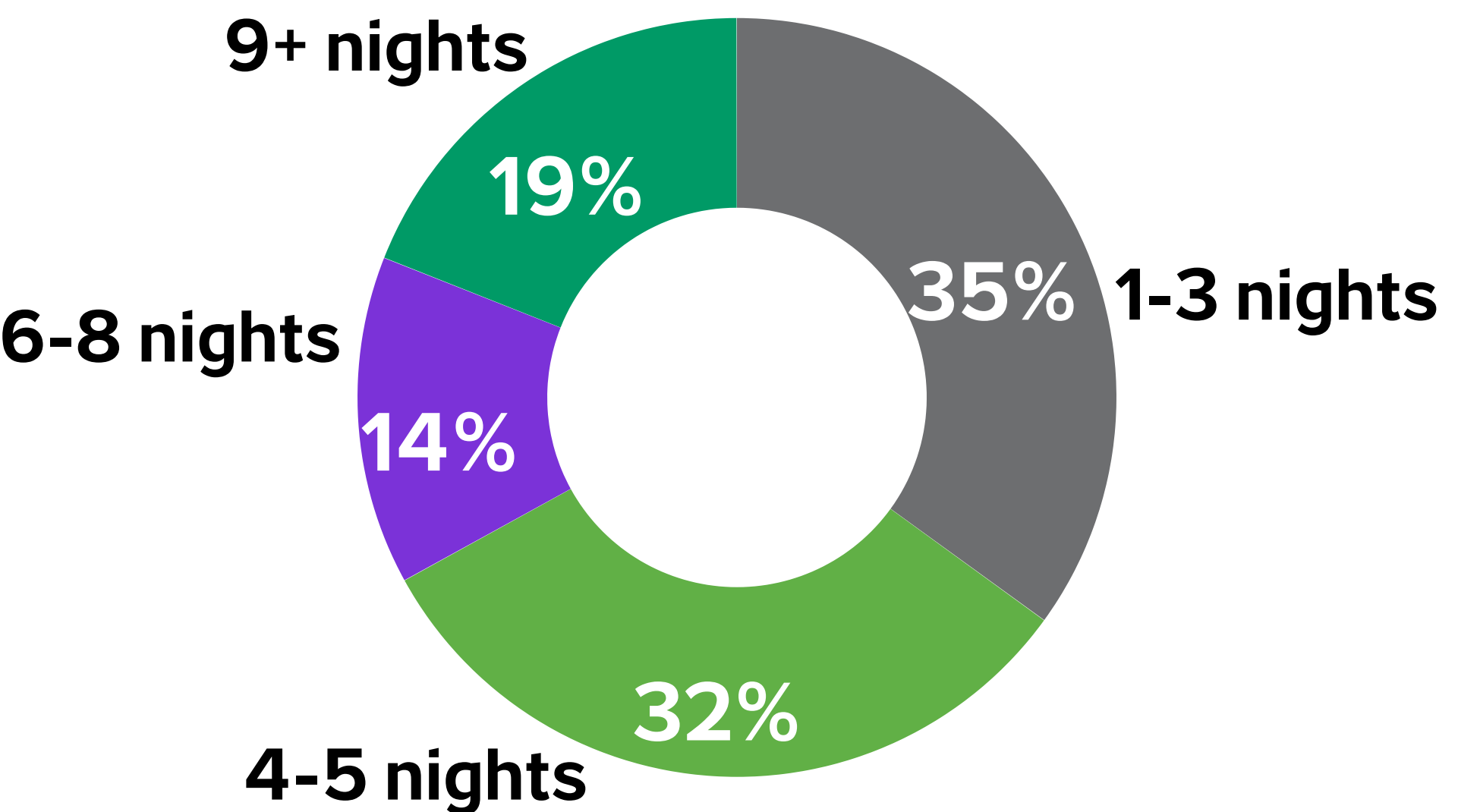
## WHEN DID OUR HOLIDAYMAKERS VISIT?

Seven-in-ten (71%) visited the island of Ireland during Q2 and Q3 (April - September).



## HOW LONG DID OUR HOLIDAYMAKERS STAY?

Two-thirds (66%) of Belgian holidaymakers stayed up to five nights on the island of Ireland.

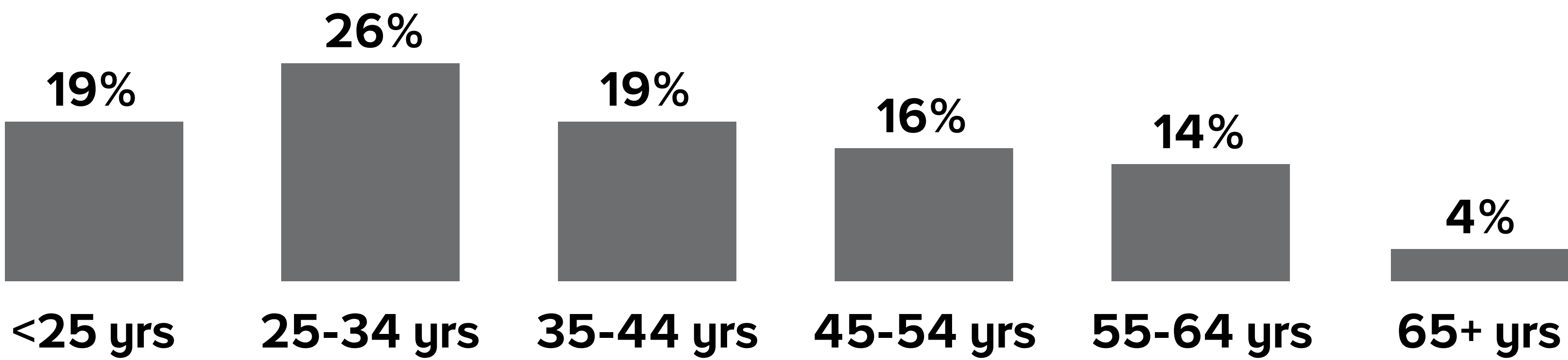




# INBOUND HOLIDAYMAKERS

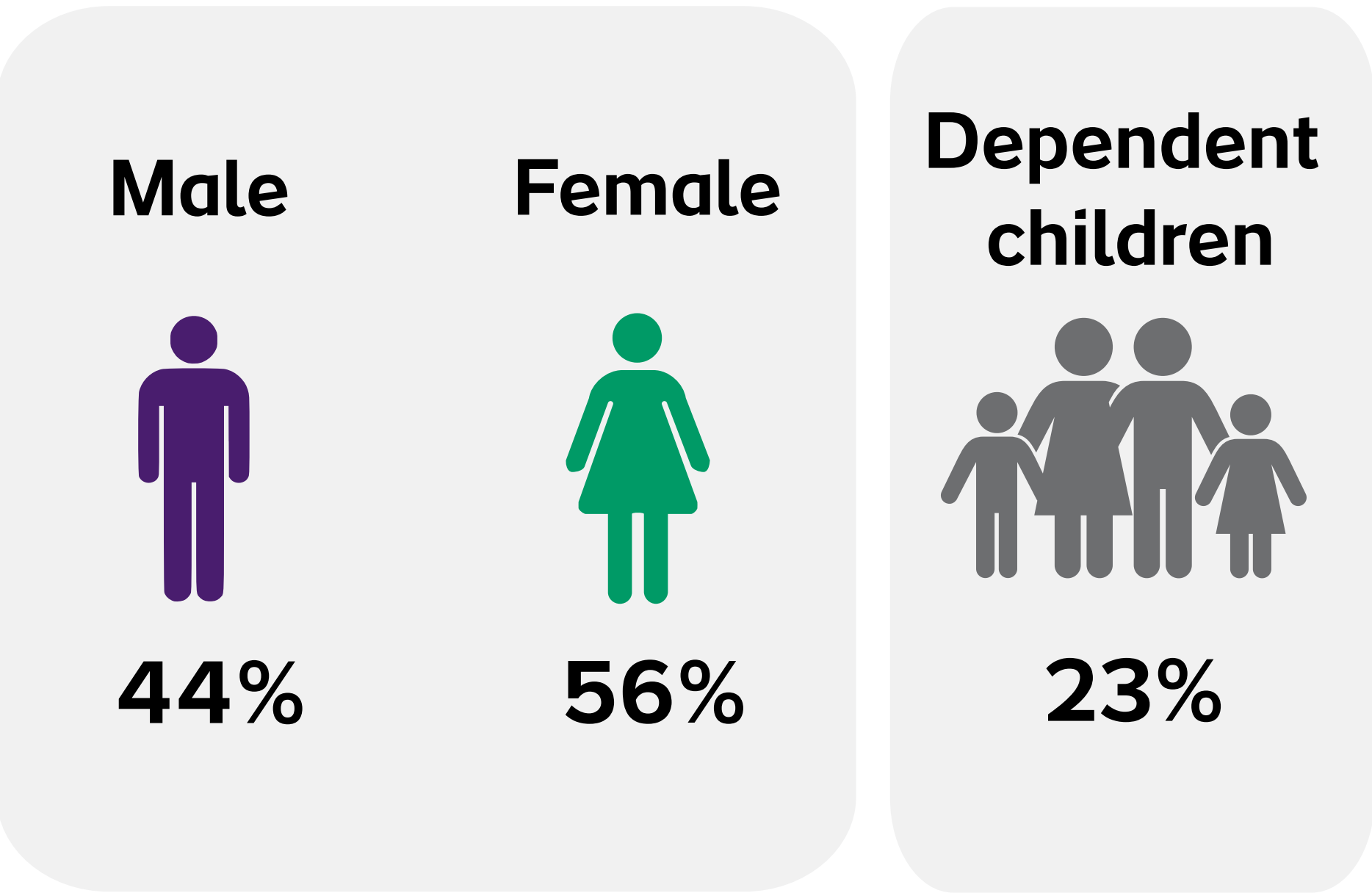
## WHAT AGE WERE OUR HOLIDAYMAKERS?

Two-thirds (65%) of Belgian holidaymakers were under 45 years old.



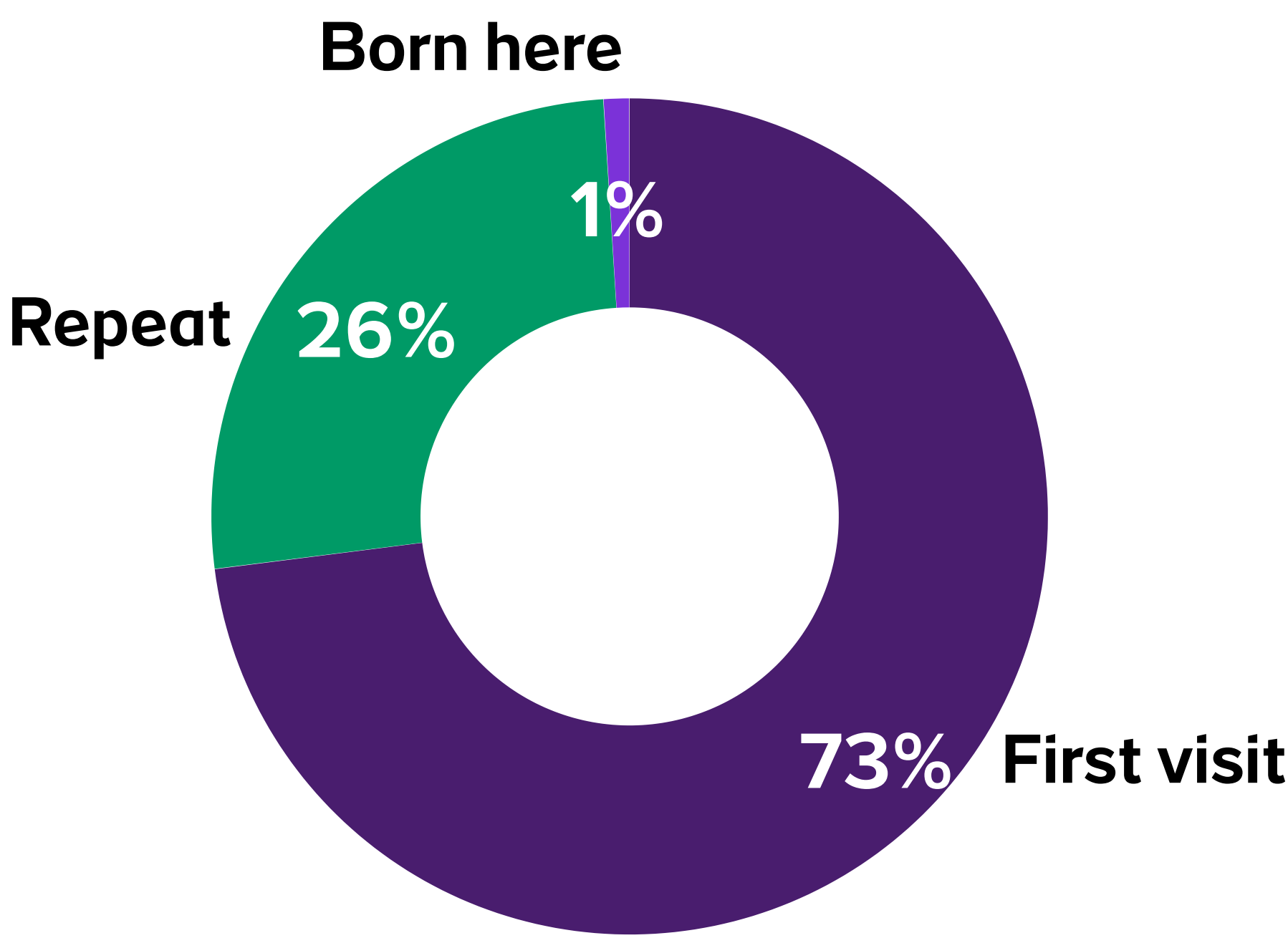
## HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

One-in-four (23%) Belgian holidaymakers had dependent children in the household (whether empty nesters or pre-children).



## HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

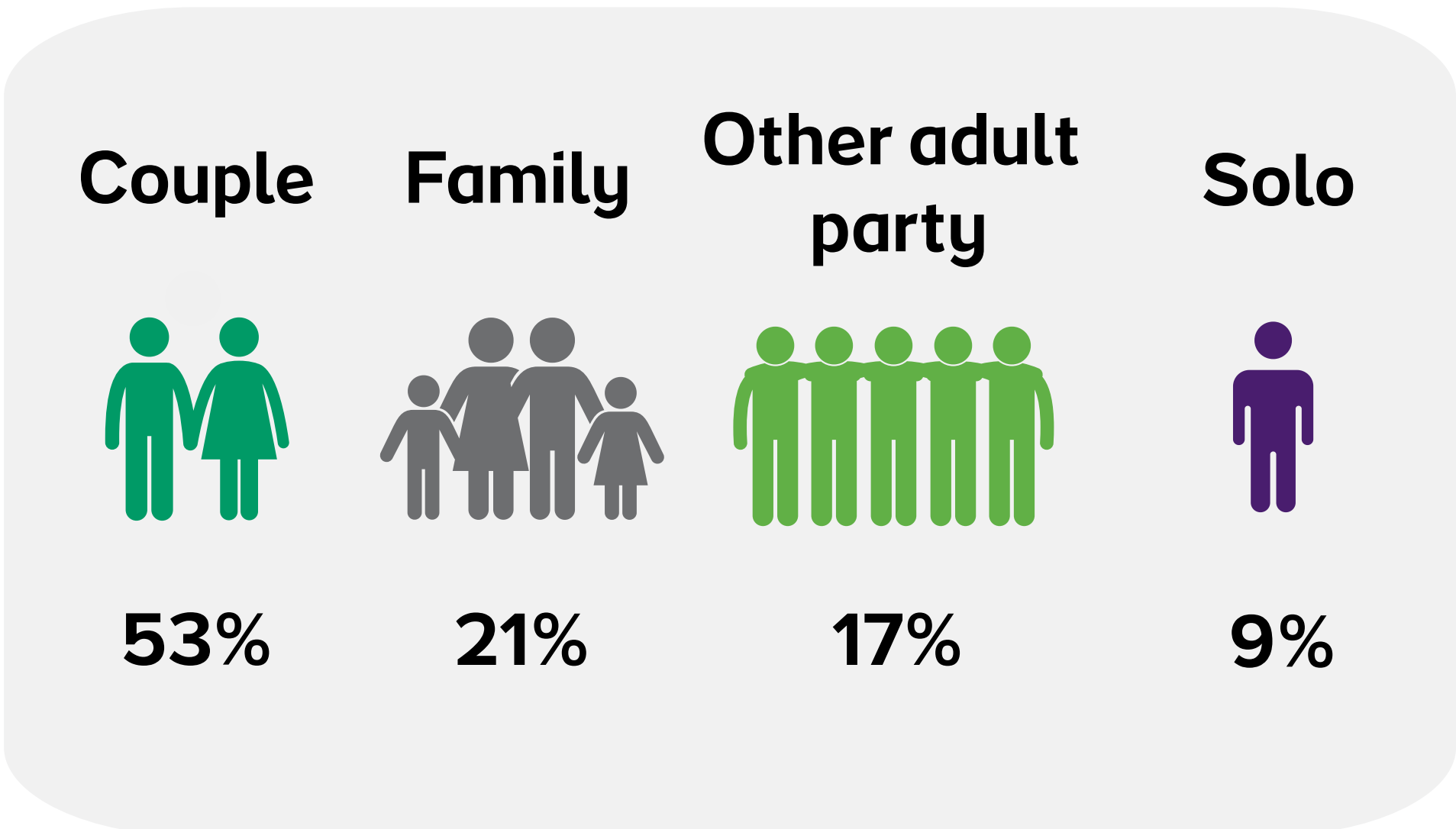
It was a first visit for almost three-quarters (73%) of Belgian holidaymakers.



## WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

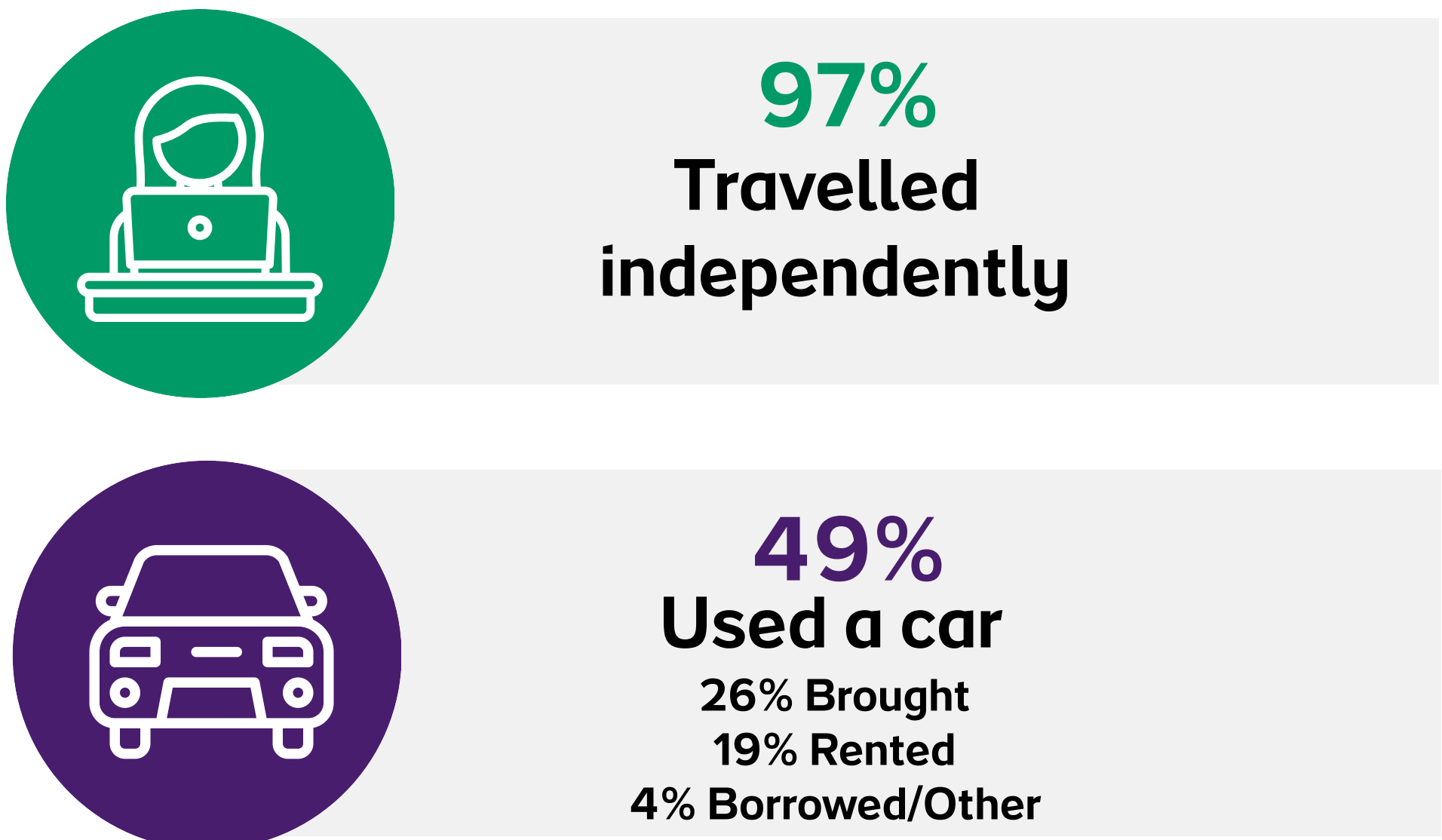
Half (53%) of Belgian holidaymakers travelled with their spouse/partner.

A fifth (21%) visited with their family.



## HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

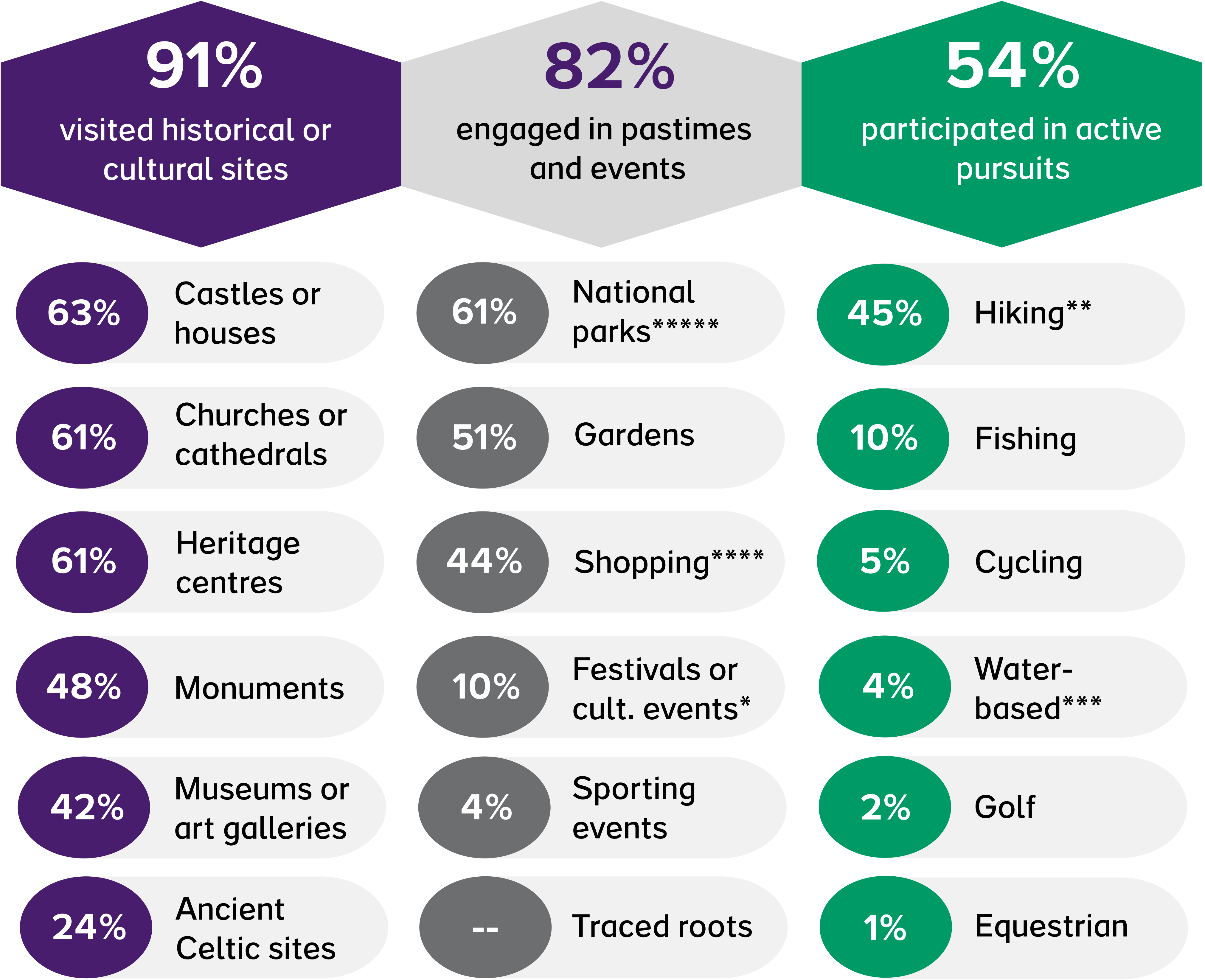
The majority (97%) of Belgian holidaymakers travelled independently and almost half (49%) used a car while on the island of Ireland.



# INBOUND HOLIDAYMAKERS

## WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

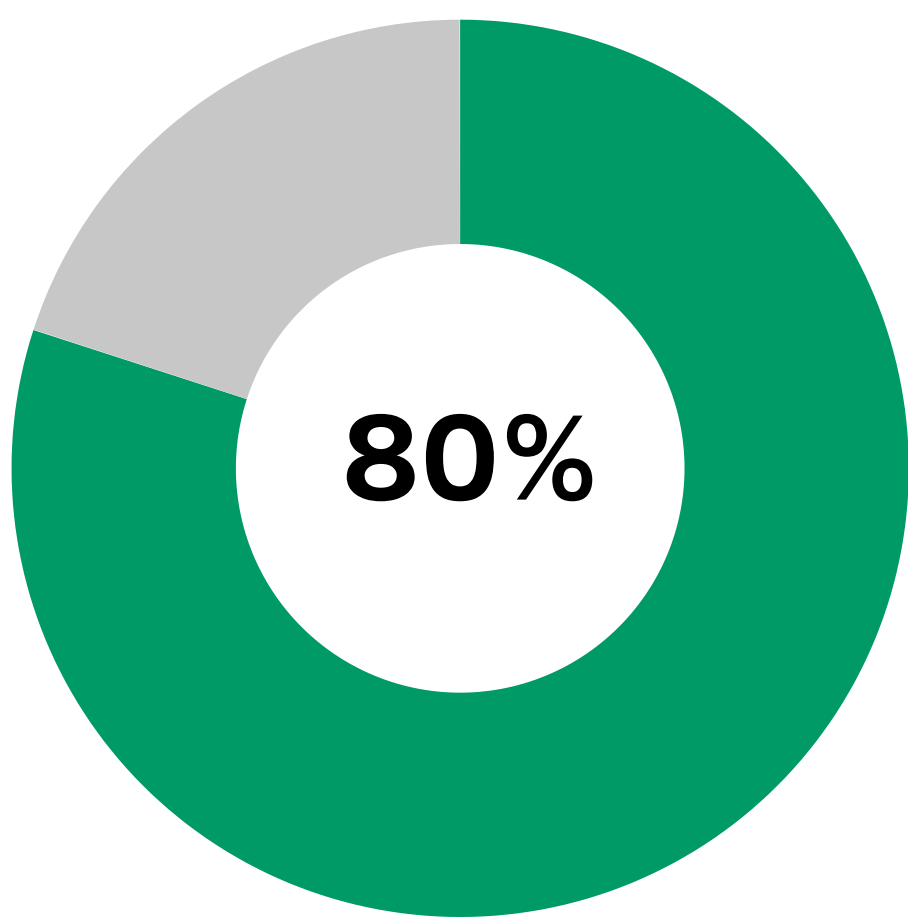
Belgian holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



\*incl. concerts | \*\*incl. cross country walking | \*\*\*excl. fishing and swimming | \*\*\*\*excl. food/drink/souvenirs | \*\*\*\*\*incl. forests

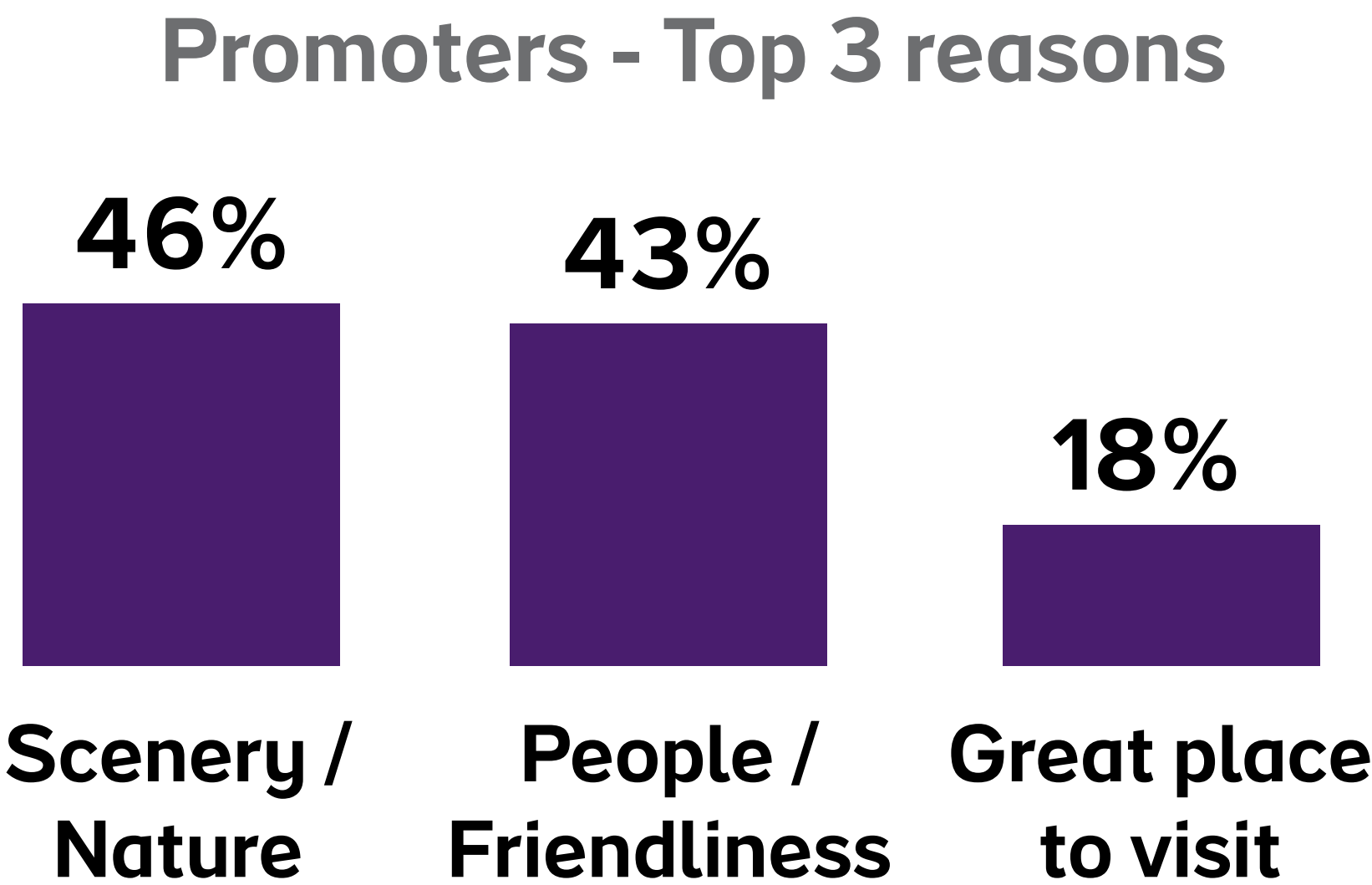
## LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS

The majority (80%) of Belgian holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the scenery and nature (46%), the friendly people (43%) and that it's generally a great place to visit (18%).



**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



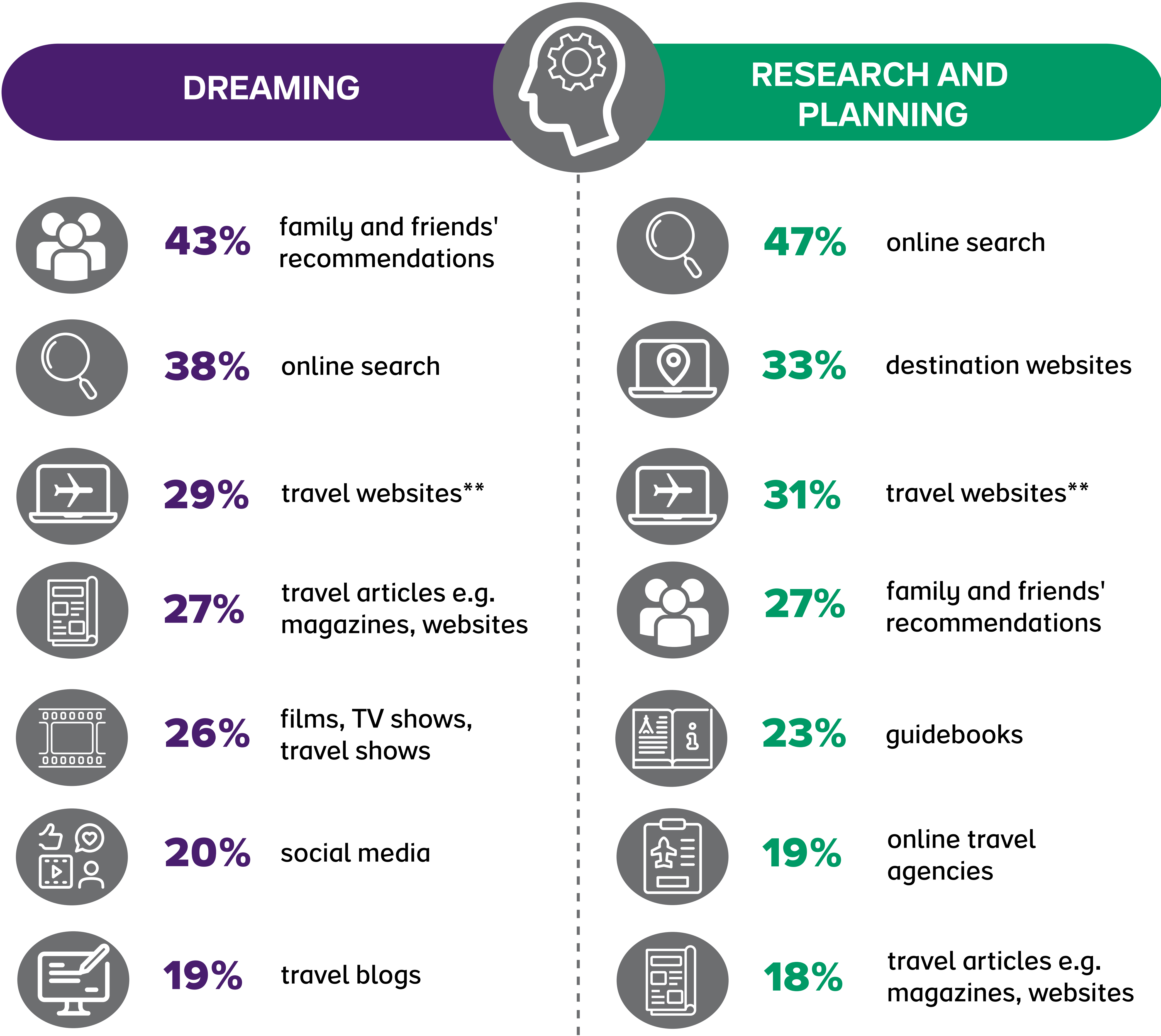


# OUTBOUND HOLIDAYMAKERS

## SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from Mainland Europe\* use multiple sources of inspiration when choosing their holiday destination, including family and friends' recommendations, online search and travel websites.

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.

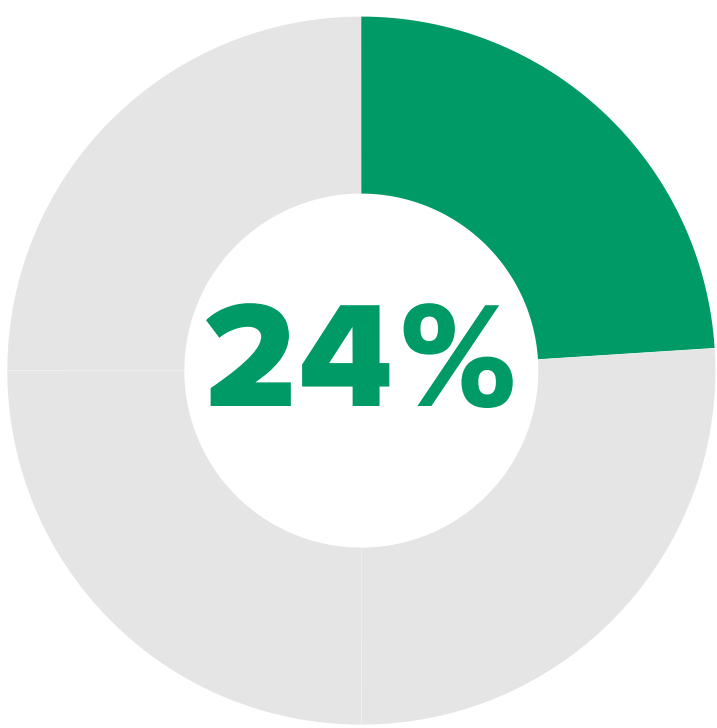


\*\*Travel websites include company websites and booking platforms

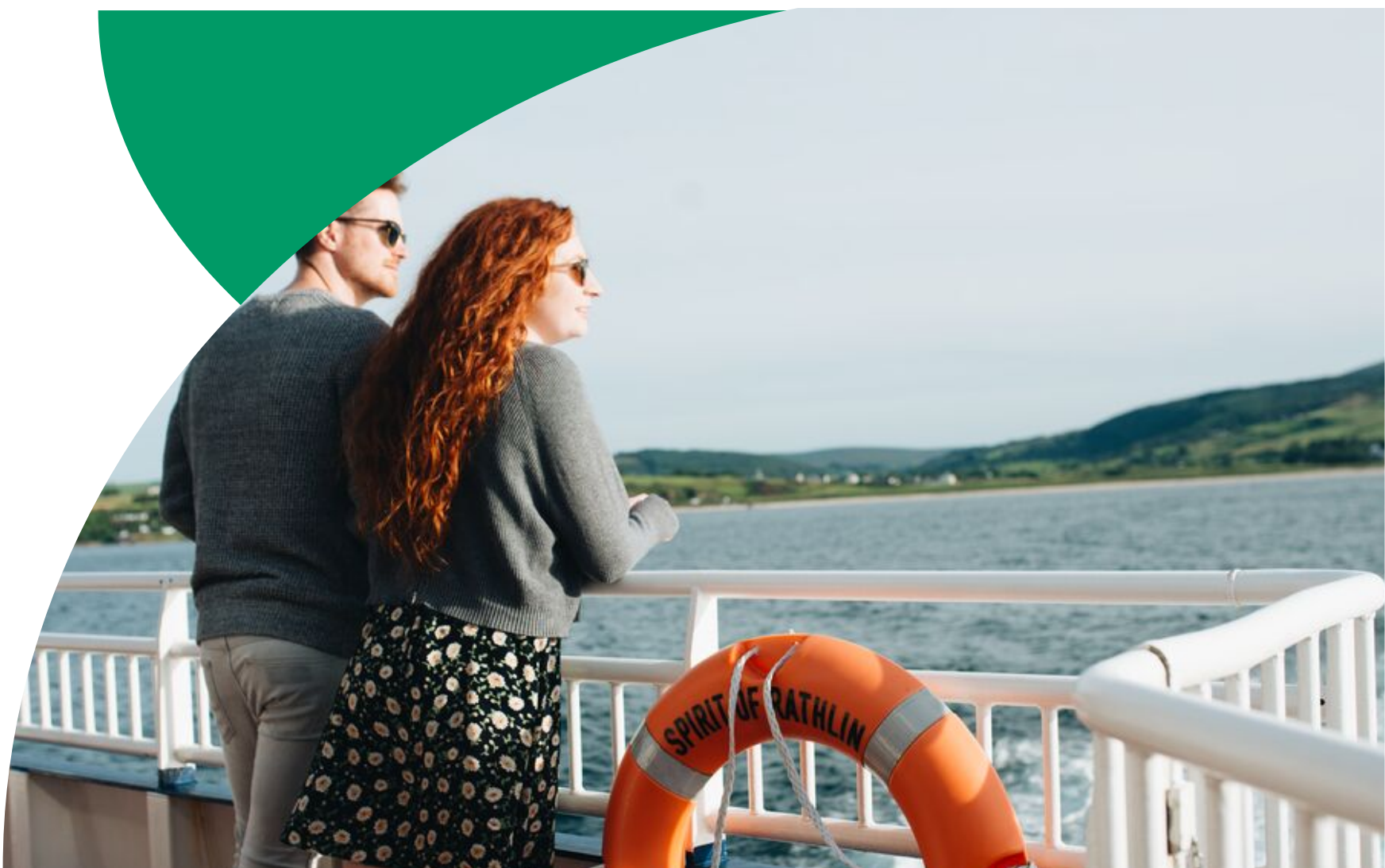


# ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



Global share of 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 get the most authentic experience. Regardless of the 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

\*Based on 13,000 surveys in 7 markets: Great Britain, USA, Canada, France, Germany, Italy, Spain.

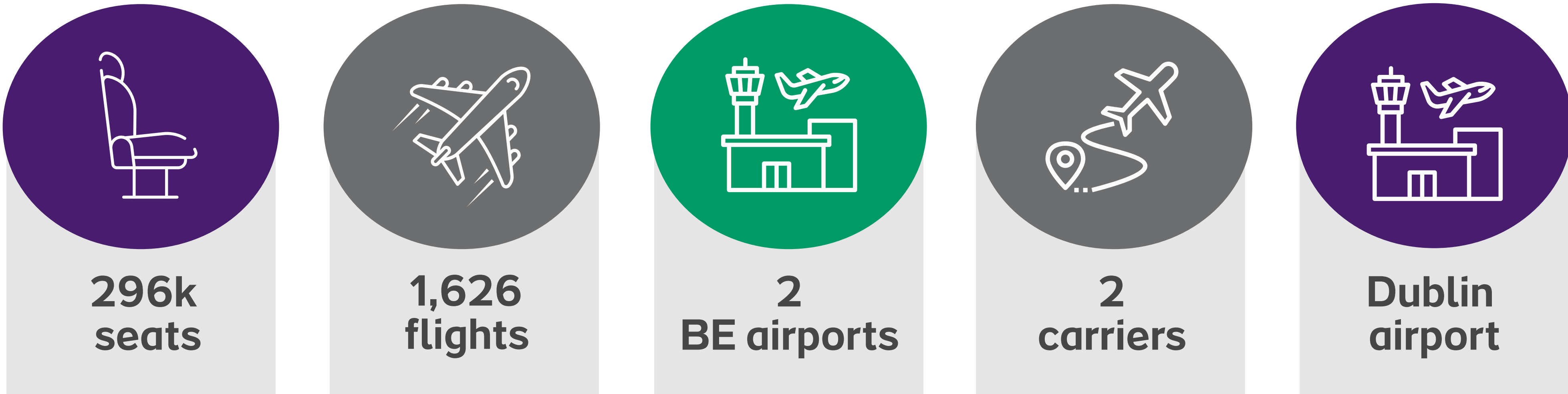


# OUTBOUND TOURISTS

Belgium was the world's fourteenth-largest outbound market in 2023 and 93% of all outbound trips from Belgium were to other parts of Europe.

## ACCESS BY AIR

Almost 296,000 direct one-way air seats were available on over 1,600 flights from Belgium to the island of Ireland in 2023. There were two gateways from Belgium to Dublin airport.



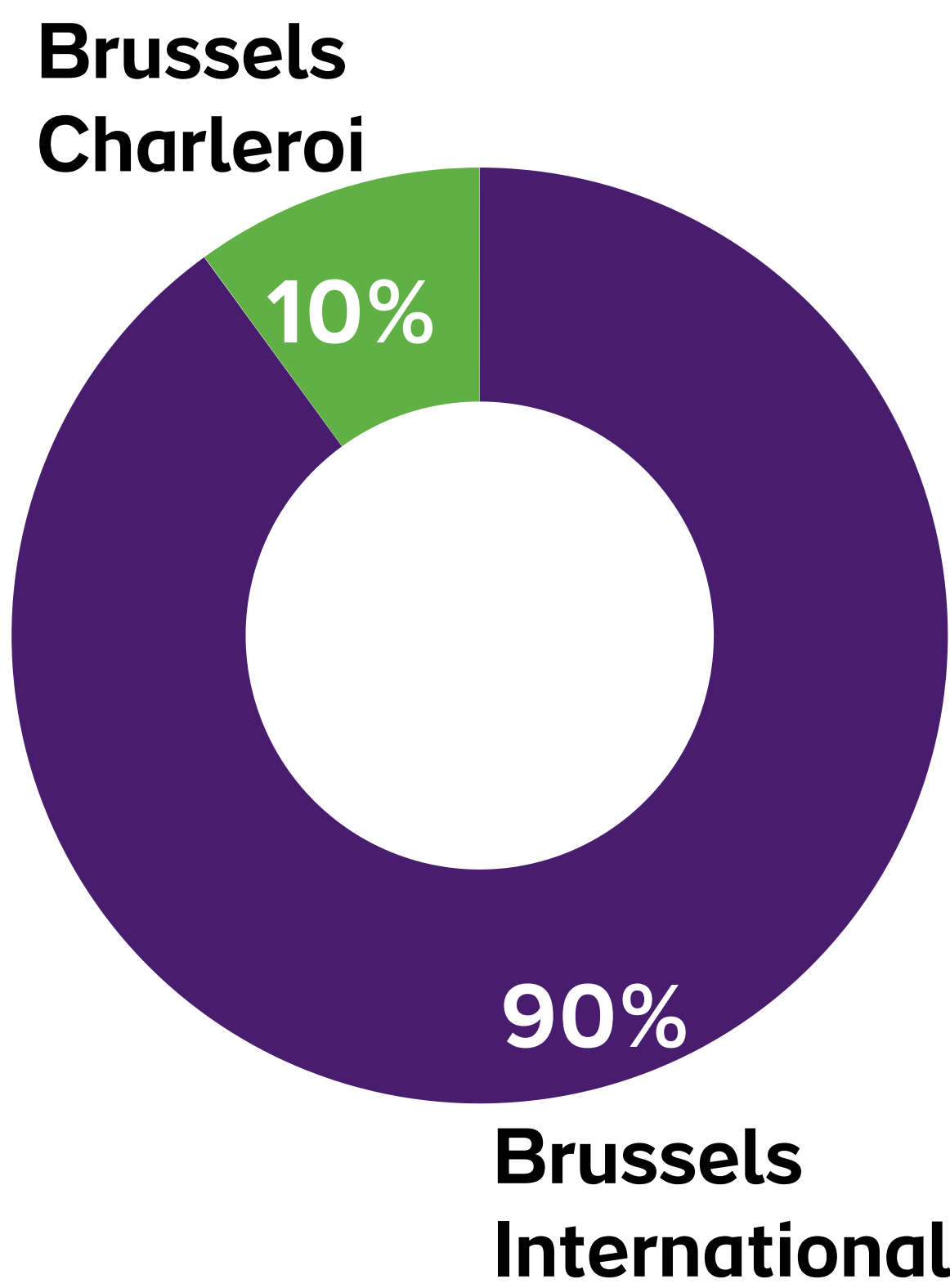
### WHERE CAN OUR TOURISTS FLY FROM?

Brussels international airport accounted for the majority (90%) of seats in 2023.

### WHO CAN OUR TOURISTS FLY WITH?

Two carriers operated between Belgium and the island of Ireland. In 2023, Ryanair was responsible for delivering the majority (59%) of seats to the island of Ireland.

Share of seats by airport



Share of seats by carrier

