

Belgium Market Profile 2024

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Inbound Tourists

The island of Ireland welcomed around 77,000 Belgian tourists who spent almost €54 million / £47 million and stayed 490,000 nights.

| Metric | Value | Global Rank |
|---------|---------------------------|-------------|
| Revenue | €54 million / £47 million | 14th |
| Trips | 77 thousand | 13th |
| Nights | 490 thousand | 15th |

Where did our tourists visit?

Of the Belgian tourists that visited the island, 3% overnighted in both Ireland and Northern Ireland.

| Country | Trips |
|------------------|--------|
| Ireland | 75,000 |
| Northern Ireland | 4,000 |

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

When did our tourists visit?

Around three-fifths (59%) of Belgian tourists visited the island in the first half of the year.

| Quarter | Share of visits |
|-----------|-----------------|
| Quarter 1 | 27% |
| Quarter 2 | 32% |
| Quarter 3 | 21% |
| Quarter 4 | 20% |

What were our tourists' reasons for visiting?

Half (49%) of Belgian tourists visiting the island of Ireland came for a holiday, accounting for 56% of Belgian tourism revenue. A fifth (20%) visited for business-related reasons, accounting for the second largest share (18%) of Belgian tourism revenue.

| Purpose of visit | Revenue | Share of revenue |
|------------------------------|---------------------------|------------------|
| Holiday | €30 million / £26 million | 56% |
| Visiting friends / relatives | €8 million / £7 million | 16% |
| Business | €10 million / £8 million | 18% |
| Other | €6 million / £5 million | 10% |

| Purpose of visit | Trips | Share of trips |
|------------------------------|--------|----------------|
| Holiday | 37,000 | 49% |
| Visiting friends / relatives | 20,000 | 27% |
| Business | 15,000 | 20% |
| Other | 4,000 | 5% |

| Purpose of visit | Nights | Share of nights |
|------------------------------|---------|-----------------|
| Holiday | 252,000 | 52% |
| Visiting friends / relatives | 116,000 | 24% |
| Business | 50,000 | 10% |
| Other | 71,000 | 15% |

How much did our tourists spend and how long did they stay?

On average, Belgian tourists spent €702 / £611 per trip or €110 / £95 per night and stayed 6.4 nights on the island of Ireland.

| Region | Metric | Value |
|-------------------|-------------------------|-------------|
| Island of Ireland | Average spend per trip | €702 / £611 |
| Island of Ireland | Average spend per night | €110 / £95 |
| Island of Ireland | Average length of stay | 6.4 nights |

How did our tourists spend their money?

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

| Category | Share of spend |
|---------------|----------------|
| Accommodation | 36% |
| Food & drink | 35% |
| Shopping | 14% |
| Transport | 9% |
| Entertainment | 7% |
| Miscellaneous | 1% |

How long did our tourists stay?

Seven in ten (69%) stayed up to five nights on the island of Ireland.

| Length of stay | Share of trips |
|----------------|----------------|
| 1-3 nights | 36% |
| 4-5 nights | 33% |
| 6-8 nights | 14% |
| 9+ nights | 16% |

Regionality: Inbound Tourists and Holidaymakers

Definitions

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

What areas did our tourists and holidaymakers visit?

Dublin and the South-West ranked among the top three most visited destinations for Belgian tourists and holidaymakers. Mid-East and Midlands was the third most visited by tourists, while the West ranked second among holidaymakers.

| Region | Share of tourists |
|---------------------|-------------------|
| Dublin | 63% |
| Midlands / Mid-East | 14% |
| South-East | 6% |
| South-West | 20% |
| Mid-West | 6% |
| West | 9% |
| Border | 5% |
| Northern Ireland | 5% |

| Region | Share of holidaymakers |
|---------------------|------------------------|
| Dublin | 67% |
| Midlands / Mid-East | 11% |
| South-East | 7% |
| South-West | 24% |
| Mid-West | 13% |
| West | 25% |
| Border | 8% |
| Northern Ireland | 5% |

Where did our tourists and holidaymakers visit?

Dublin was a must-visit for the majority of Belgian tourists (63%) and holidaymakers (67%).

| Region | Share of tourists |
|--------------------------------|-------------------|
| Dublin only | 52% |
| Outside Dublin only | 37% |
| Both Dublin and outside Dublin | 11% |

| Region | Share of holidaymakers |
|--------------------------------|------------------------|
| Dublin only | 48% |
| Outside Dublin only | 33% |
| Both Dublin and outside Dublin | 19% |

Inbound Holidaymakers

Belgian holidaymakers spent on average €808 / £703 per trip and stayed for an average of 6.8 nights on the island of Ireland in 2024.

| Metric | Value | Global Rank |
|---------|---------------------------|-------------|
| Revenue | €30 million / £26 million | 12th |
| Trips | 37 thousand | 12th |
| Nights | 252 thousand | 12th |

| Region | Metric | Value |
|-------------------|-------------------------|-------------|
| Island of Ireland | Average spend per trip | €808 / £703 |
| Island of Ireland | Average spend per night | €119 / £104 |
| Island of Ireland | Average length of stay | 6.8 nights |

When did our holidaymakers visit?

Seven in ten (72%) visited the island of Ireland during Q2 and Q3 (April - September).

| Quarter | Share of visits |
|-----------|-----------------|
| Quarter 1 | 16% |
| Quarter 2 | 35% |
| Quarter 3 | 37% |
| Quarter 4 | 12% |

How long did our holidaymakers stay?

Two-thirds (68%) of Belgian holidaymakers stayed up to five nights on the island of Ireland.

| Length of stay | Share of trips |
|----------------|----------------|
| 1-3 nights | 35% |
| 4-5 nights | 33% |
| 6-8 nights | 17% |
| 9+ nights | 15% |

What age were our holidaymakers?

More than two-thirds (69%) of Belgian holidaymakers were under 45 years old.

| Age | Share of trips |
|-------------|----------------|
| <25 years | 18% |
| 25-34 years | 31% |
| 35-44 years | 20% |
| 45-54 years | 16% |
| 55-64 years | 11% |
| 65+ years | 4% |

Holidaymaker gender and dependent children

One-in-four (25%) Belgian holidaymakers had dependent children in the household.

| Gender | Share of trips |
|--------|----------------|
| Female | 58% |
| Male | 42% |

Had our holidaymakers been here before?

It was a first visit for around three-quarters (77%) of Belgian holidaymakers.

| Visitor type | Share of trips |
|-----------------|----------------|
| First visit | 77% |
| Repeat visit | 22% |
| Born in Ireland | 1% |

Who did our holidaymakers travel with?

Half (48%) of Belgian holidaymakers travelled with their spouse/partner. An eighth (12%) visited with their family.

| Party composition | Share of trips |
|-------------------|----------------|
| Solo | 16% |
| Couple | 48% |
| Family | 12% |
| Other adult party | 24% |

How did our holidaymakers travel and get around

Almost all (98%) Belgian holidaymakers travelled independently and more than a third (36%) used a car while on the island of Ireland.

| Car use | Share of trips |
|----------------------|----------------|
| Hired a car | 18% |
| Brought own car | 15% |
| Borrowed a car/Other | 3% |
| Did not use a car | 64% |

What were our holidaymakers' interest 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.

92% visited historical or cultural sites.

| Type of activity | Share of trips |
|--------------------------|----------------|
| Castles or houses | 65% |
| Churches or cathedrals | 64% |
| Heritage centres | 61% |
| Monuments | 55% |
| Museums or art galleries | 48% |
| Ancient Celtic sites | 29% |

85% engaged in pastimes and events.

| Type of activity | Share of trips |
|---|----------------|
| National parks including forests | 61% |
| Shopping excluding food, drink, and souvenirs | 53% |
| Gardens | 49% |
| Festivals or cultural events including concerts | 10% |
| Sporting events | 2% |
| Traced roots | |

57% participated in active pursuits.

| Type of activity | Share of trips |
|---|----------------|
| Hiking including cross-country walking | 52% |
| Fishing | 5% |
| Water-based activities excluding fishing and swimming | 5% |
| Cycling | 4% |
| Golf | 2% |
| Equestrian | 1% |

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%).

Outbound holidaymakers

Sources of inspiration, research and planning

Outbound holidaymakers 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.

| Channel | Share of holidaymakers' inspiration |
|--|-------------------------------------|
| Family and friends' recommendations | 44% |
| Online search | 37% |
| Travel websites including company websites and booking platforms | 28% |
| Destination websites | 23% |
| Films, TV shows, travel shows | 23% |
| Social media | 23% |
| Travel articles, blogs | 22% |

| Channel | Share of holidaymakers' research and planning |
|--|---|
| Online search | 51% |
| Travel websites including company websites and booking platforms | 40% |
| Destination websites | 37% |
| Family and friends' recommendations | 29% |
| Travel articles, blogs | 24% |
| Guidebooks | 23% |
| Social media | 19% |

Enrichment Explorers

Our target segment makes up 24% of all Global 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 simulate their 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

Belgium was the world's thirteenth-largest outbound market in 2024 and 92% of all outbound trips from Belgium were to other parts of Europe.

Access by air

There were 322 thousand direct one-way air seats available on 1,767 flights from Belgium to the island of Ireland in 2024. There were 2 gateways from Belgium, operated by 2 carriers to 2 airports on the island of Ireland.

Where can our tourists fly from?

Brussels international airport accounted for the majority (85%) of seats in 2024.

| Airports in Belgium | Share of seats |
|------------------------|----------------|
| Brussels International | 85% |
| Brussels Charleroi | 15% |

Who can our tourists fly with?

Two carriers operated between Belgium and the island of Ireland. In 2024, Ryanair was responsible for delivering the majority (62%) of seats to the island of Ireland.

| Carrier | Share of seats |
|------------|----------------|
| Ryanair | 62% |
| Aer Lingus | 38% |