

BELGIUM

MARKET PROFILE 2025



INBOUND TOURISTS

In 2025, the island of Ireland welcomed 59,000 Belgian tourists, who spent €49/£42 million and stayed 435,000 nights. Belgium was the island's thirteenth-largest source of overseas tourists, fifteenth-largest source of revenue and seventeenth-largest source of bednights.



€49/£42m
revenue

#15
global rank



59k
trips

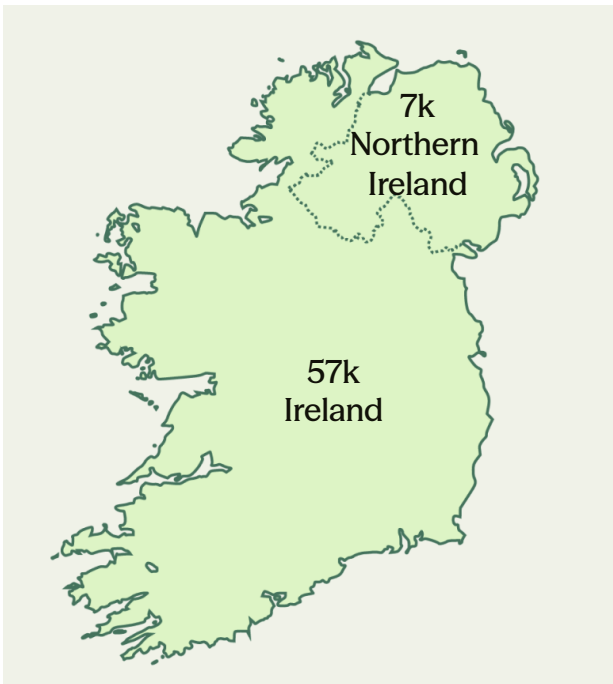
#13
global rank



435k
nights

#17
global rank

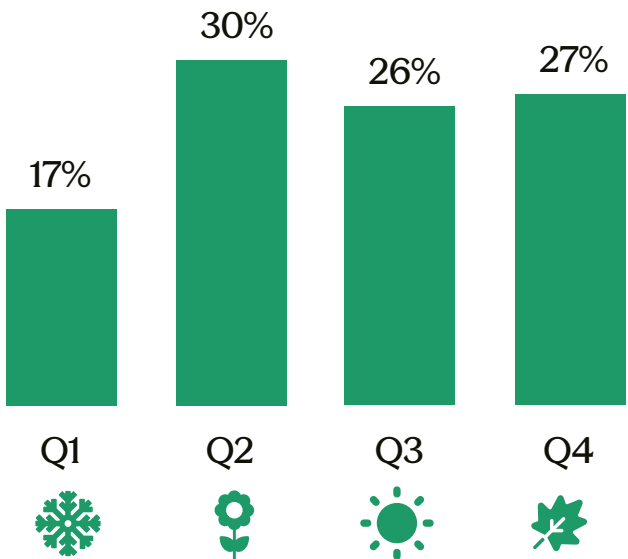
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?

Inbound tourism from Belgium is broadly spread throughout the year, after a quieter Q1.



INBOUND TOURISTS

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Holiday spend represents the largest source of revenue (44%) from Belgian tourists, generated by one-third (34%) of Belgian trips. A similar portion (33%) came to visit friends or relatives, but accounted for a much smaller share (17%) of spend.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€22/£19m	44%	20k	34%	140k	32%
 VFR	€8/£7m	17%	19k	33%	111k	25%
 BUSINESS	€9/£8m	19%	16k	26%	60k	14%
 OTHER	€9/£8m	19%	6k	10%	124k	29%

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

In 2025, Belgian tourists stayed an average of 7.3 nights on the island of Ireland and spent €822/£715 per trip, equivalent to €112/£98 per night.



€822/£715 (IOI)
£323 (NI)

Av. spend per trip



€112/£98 (IOI)
£72 (NI)

Av. spend per night



7.3 (IOI)
4.5 (NI)

Av. stay (nights)

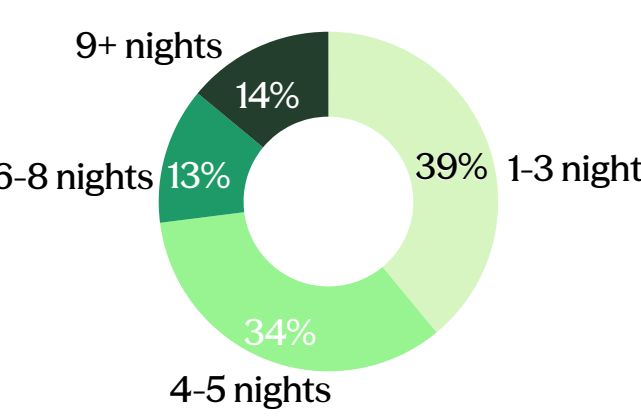
HOW DID OUR TOURISTS SPEND THEIR MONEY?

Food and drink represented the largest share of Belgian visitor expenditure (36%), ahead of accommodation and all other trip costs.

Food & drink	Accomm.	Shopping
		
36%	32%	14%
Transport	Entertainment	Misc.
		
9%	9%	1%

HOW LONG DID OUR TOURISTS STAY?

The majority (73%) visited the island of Ireland for a break of up to five nights.



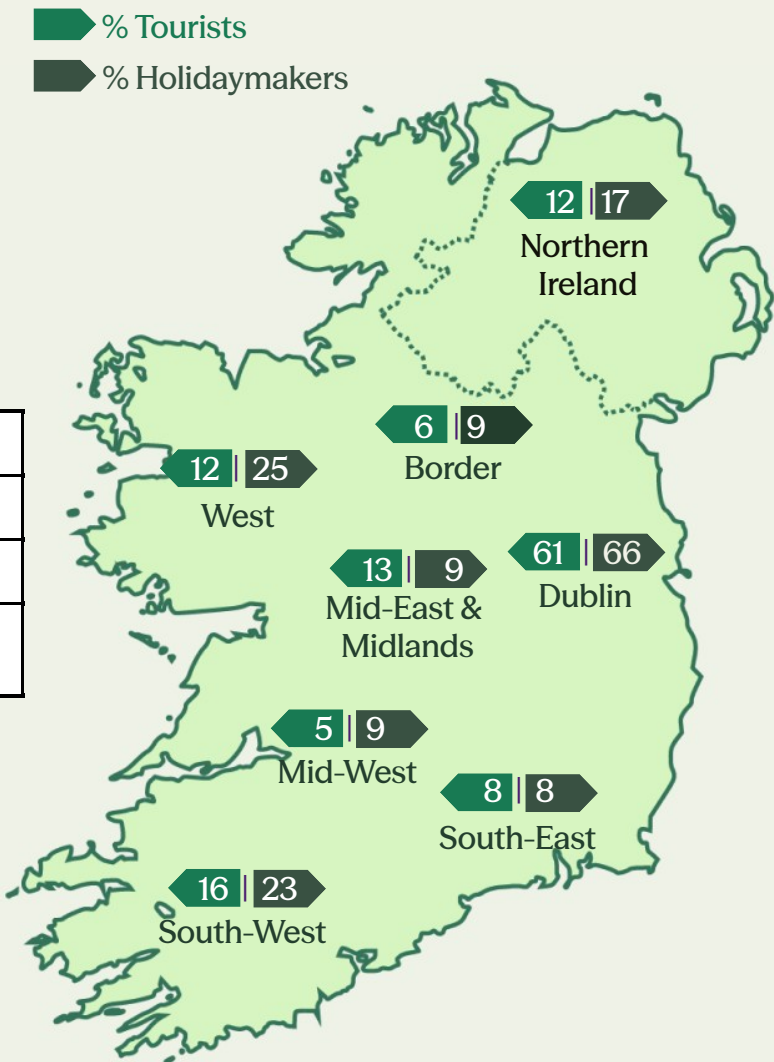
INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin and the South-West continued to dominate Belgian travel itineraries, ranking among the most visited destinations for both tourists and holidaymakers.

Around one in twelve tourists and one in seven holidaymakers from Belgium overnighted on both sides of the border.

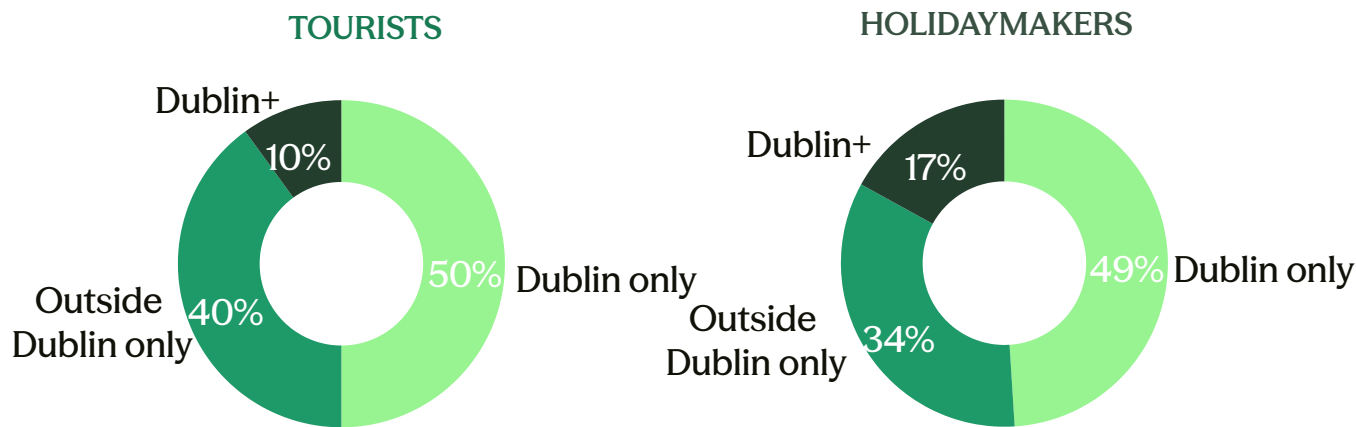
Top	Tourists	Holidaymakers
1	Dublin	Dublin
2	South-West	West
3	Mid-East & Midlands	South-West



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?

A Dublin-only trip was the most popular trip type for Belgian visitors and holidaymakers.



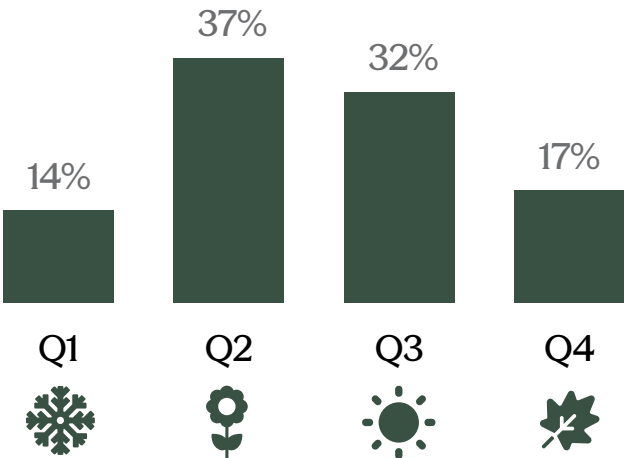
INBOUND HOLIDAYMAKERS

Belgium was the island of Ireland's thirteenth-largest source of holiday spend and trips and the fourteenth-largest source of holiday nights. Belgian holidaymakers stayed an average of 7 nights on the island of Ireland. Those visiting Northern Ireland stayed an average of 2.9 nights.



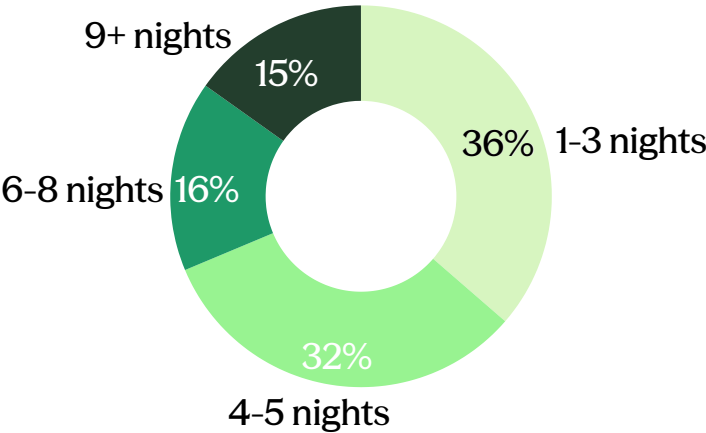
WHEN DID OUR HOLIDAYMAKERS VISIT?

Belgian holiday travel was concentrated in the spring and summer months, with seven in ten Belgian holidaymakers (69%) visiting in Q2 and Q3 (April to September).



HOW LONG DID OUR HOLIDAYMAKERS STAY?

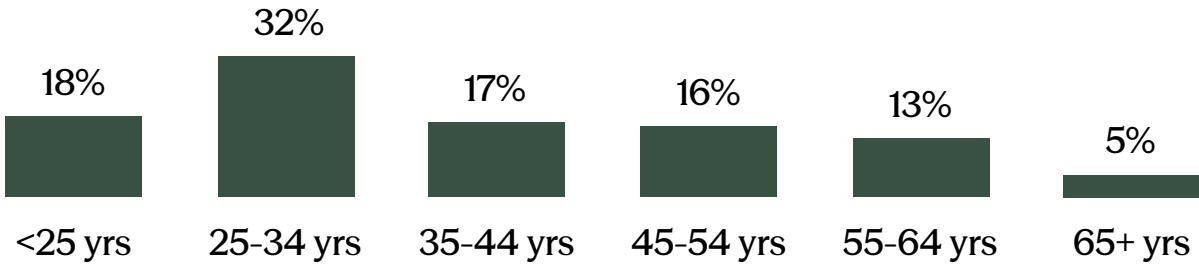
Most Belgian holidaymakers (69%) stayed on the island of Ireland for a short break of up to five nights.



INBOUND HOLIDAYMAKERS

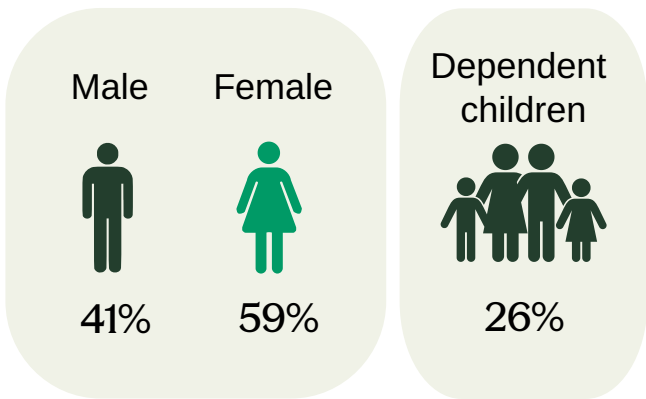
WHAT AGE WERE OUR HOLIDAYMAKERS?

Most Belgian holidaymakers (67%) were aged under 45.



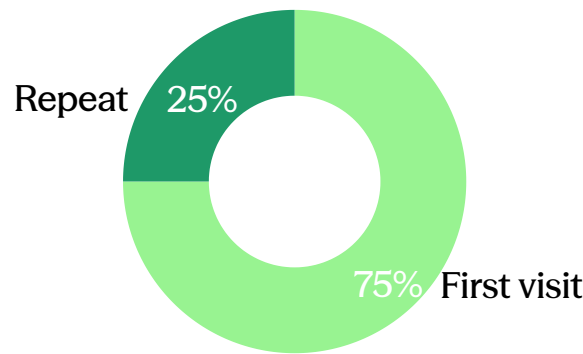
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN*

Just over a quarter of Belgian holidaymakers visiting the island of Ireland (26%) had dependent children in their household.



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

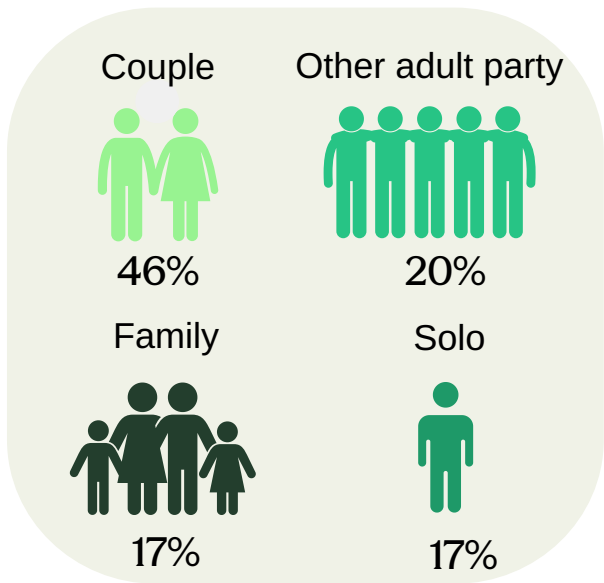
For three-quarters (75%) of Belgian holidaymakers, 2025 marked their first visit to the island of Ireland.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Travelling with a spouse/partner was the most common travel-party type, accounting for almost half (46%) of Belgian holidaymakers.

One-fifth travelled with other adults (20%).

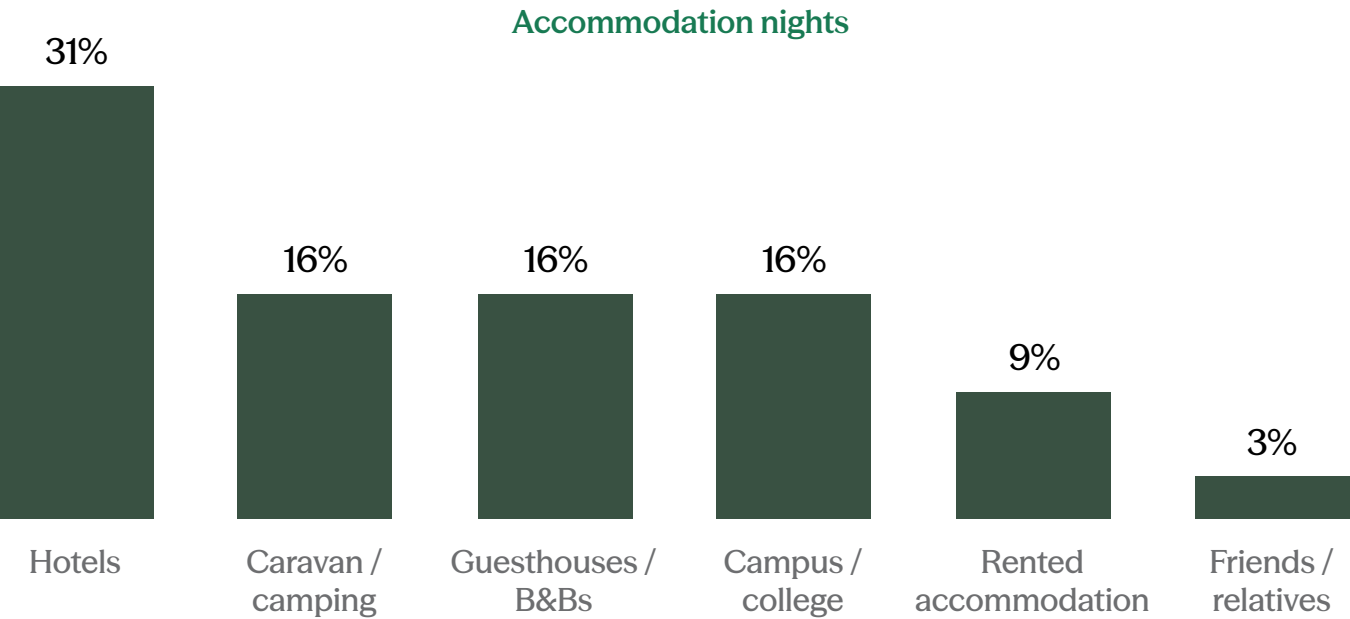


*Survey of Overseas Travellers only
Source: Fáilte Ireland's Survey of Overseas Travellers, NISRA

INBOUND HOLIDAYMAKERS

WHERE DID OUR HOLIDAYMAKERS STAY?

Under one-third (31%) of nights stayed by Belgian holidaymakers were in hotels, while around one in six (16%) nights were spent camping, in guesthouses or B&Bs (16%) or on college campuses (16%).



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?*

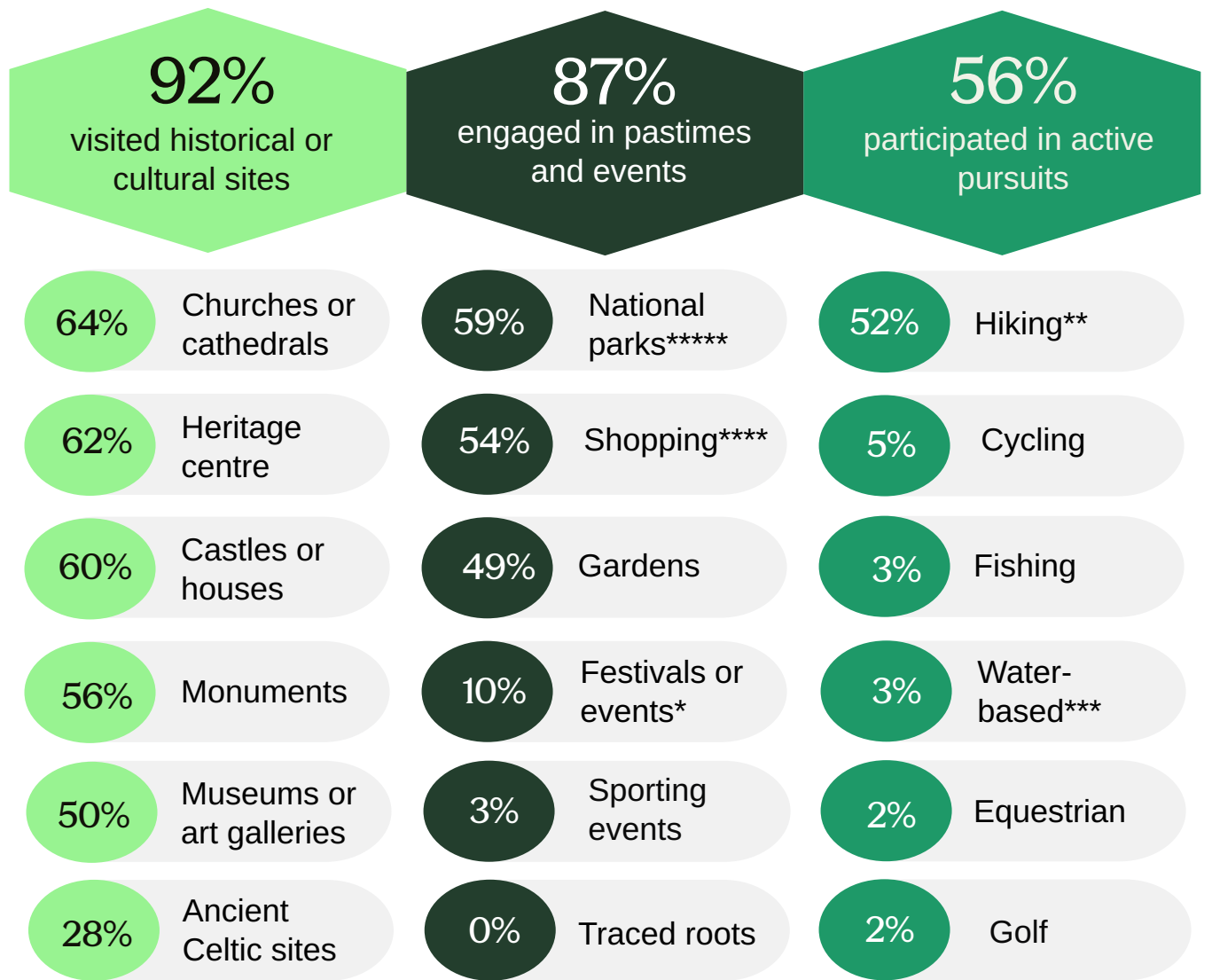
Independent travel dominated the market, with virtually all Belgian holidaymakers (99%) organising their trip independently. One in three used a car while in Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

Belgian holidaymakers are highly engaged visitors, combining cultural sightseeing with a wide range of recreational and outdoor activities during their trip.



*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

Three-quarters (75%) of Belgian holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (46%), our scenery and nature (45%) and our rich history (15%).



OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from Belgium 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.

At least one in three cited recommendations from family and friends as a source of inspiration

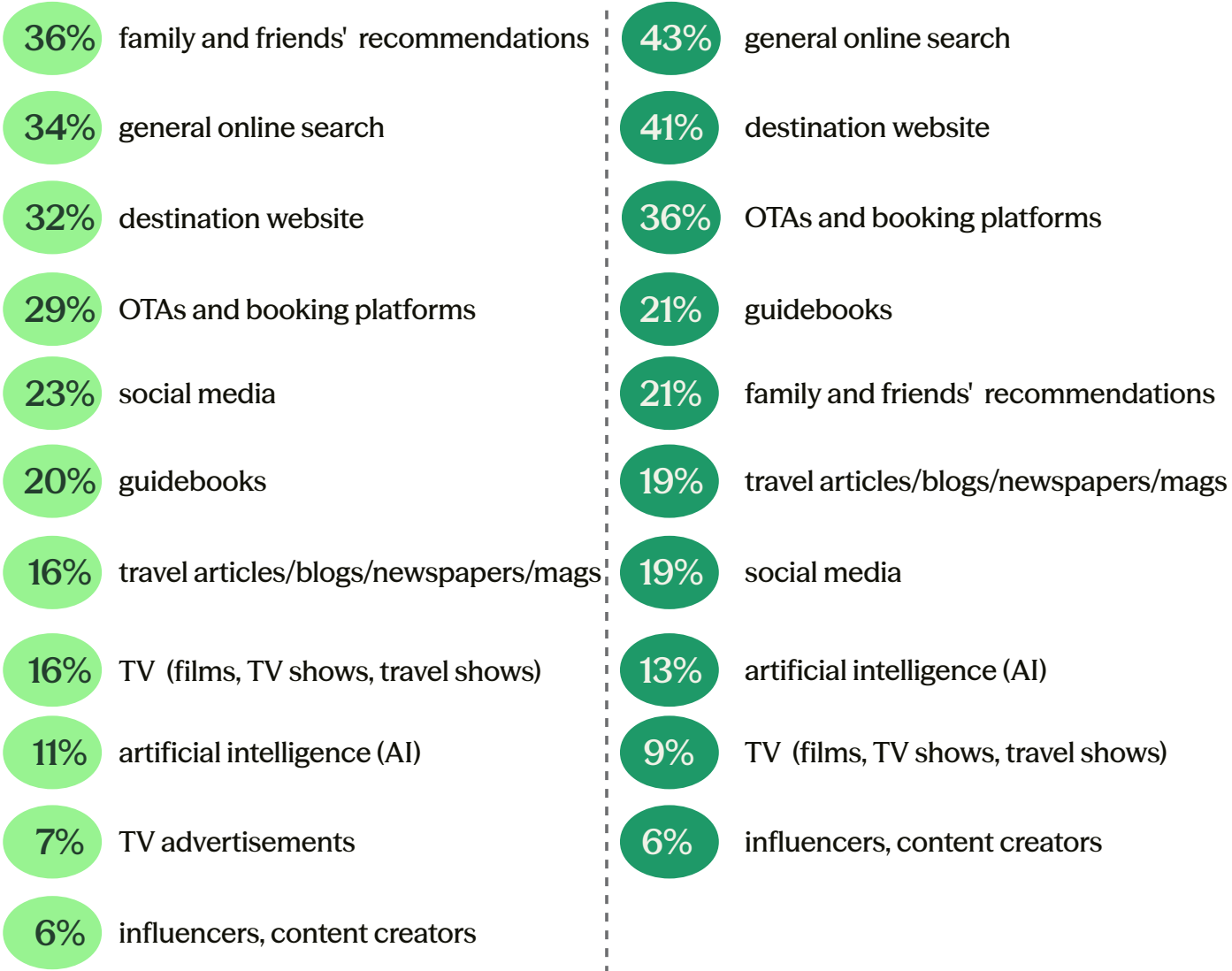
Many holidaymakers (43%) use general online search to plan their trip

DREAMING



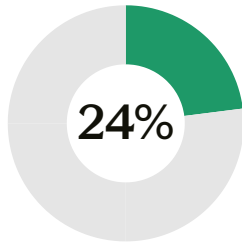
RESEARCH AND PLANNING

BASED ON RESPONDENTS' TOP 3 SOURCES



ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



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 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

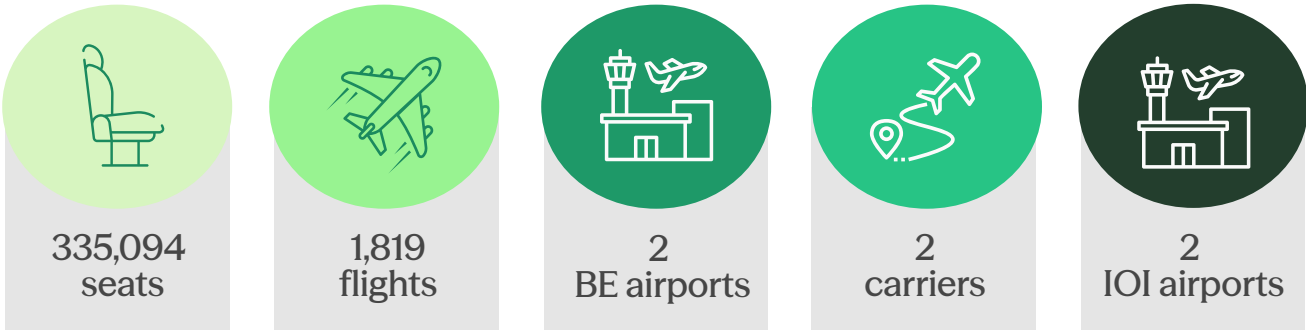
- | | | | | | |
|---|---|--|----|---|---|
| 1 |  | To feel connected to nature | 6 |  | To experience living like a local |
| 2 |  | To broaden and stimulate my mind | 7 |  | To enjoy authentic moments with friendly locals |
| 3 |  | To feel the character of the place and people | 8 |  | To be transported back in history |
| 4 |  | To appreciate historical/modern architecture | 9 |  | To discover and explore somewhere new |
| 5 |  | To experience the vibrancy of the place and people | 10 |  | To enjoy the beauty of the landscape |

OUTBOUND TOURISTS

In 2025, Belgium was the world’s fourteenth-largest outbound market, with 91% of its outbound trips going to other parts of Europe.

ACCESS BY AIR

In 2025, more than 1,819 flights from 2 gateways in Belgium provided over 335,000 direct one-way air seats to the island of Ireland.



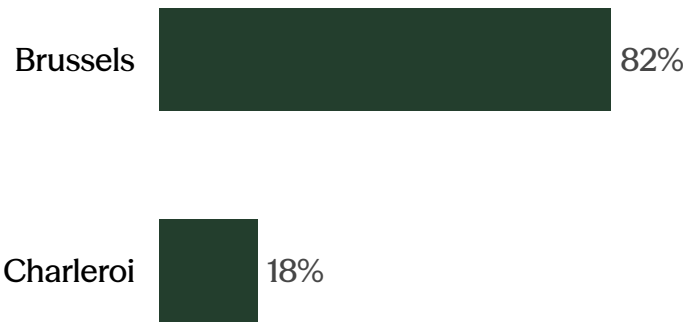
WHERE CAN OUR TOURISTS FLY FROM?

Brussels Airport accounted for the majority (82%) of seats in 2025.

WHO CAN OUR TOURISTS FLY WITH?

Two carriers operated direct routes between Belgium and the island of Ireland in 2025. Ryanair remained the leading carrier, providing 65% of available seat capacity, while Aer Lingus accounted for the remaining 35%.

SHARE OF SEATS BY AIRPORT



SHARE OF SEATS BY CARRIER

