

# Italy Market Profile 2024

## Contents

Inbound Tourists .....	2
Where did our tourists come from? .....	2
Where did our tourists visit? .....	2
When did our tourists visit? .....	2
What were our tourists' reasons for visiting? .....	3
How much did our tourists spend and how long did they stay? .....	3
How did our tourists spend their money? .....	4
How long did our tourists stay? .....	4
Regionality: Inbound Tourists and Holidaymakers .....	5
Definitions .....	5
What areas did our tourists and holidaymakers visit? .....	5
Where did our tourists and holidaymakers visit? .....	6
Inbound Holidaymakers .....	7
When did our holidaymakers visit? .....	7
How long did our holidaymakers stay? .....	7
What age were our holidaymakers? .....	7
Holidaymaker gender and dependent children .....	8
Had our holidaymakers been here before? .....	8
Who did our holidaymakers travel with? .....	8
Where did our holidaymakers stay? .....	8
How did length of stay affect accommodation type? .....	Error! Bookmark not defined.
How did our holidaymakers travel and get around .....	9
What were our holidaymakers' interest and activities? .....	9
Likelihood to recommend a holiday in Ireland to others .....	9
Outbound holidaymakers .....	10
Sources of inspiration, research and planning .....	10
Enrichment Explorers .....	11
Who are the Enrichment Explorers as people? .....	11
What do Enrichment Explorers look for on a holiday? .....	11
Top 10 holiday needs .....	11
Outbound Tourists .....	11
Access by air .....	12
Where can our tourists fly from? .....	12
Who can our tourists fly with? .....	12

## Inbound Tourists

The island of Ireland welcomed around 254,000 Italian tourists who spent over €233 million / £203 million and stayed 2.1 million nights. Italy was the island's sixth-largest source of overseas revenue and tourists, and the eighth-largest source of overseas nights.

Metric	Value	Global Rank
Revenue	€233 million / £203 million	6th
Trips	254 thousand	6th
Nights	2.1 million	8th

## Where did our tourists come from?

The majority (76%) of Italian tourists came from the Centre (45%) and the North-West (30%).

Region	Share of trips
Centre	45%
North-West	30%
North-East	13%
South	7%
Islands	5%

## Where did our tourists visit?

Country	Trips
Ireland	248,000
Northern Ireland	15,000

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?

Quarter 3 (July-September) is the most popular time for Italians to visit the island of Ireland.

Quarter	Share of visits
Quarter 1	23%
Quarter 2	24%
Quarter 3	32%
Quarter 4	22%

## What were our tourists' reasons for visiting?

Almost half (47%) of Italian tourists visiting the island of Ireland came for a holiday, accounting for 46% of Italian tourism revenue. Around one-in-seven (14%) were visiting for "other" reasons (such as to learn English as a foreign language), accounting for the largest share (35%) of Italian tourism nights.

Purpose of visit	Revenue	Share of revenue
Holiday	€107 million / £93 million	46%
Visiting friends / relatives	€27 million / £24 million	12%
Business	€37 million / £33 million	16%
Other	€62 million / £54 million	26%

Purpose of visit	Trips	Share of trips
Holiday	120,000	47%
Visiting friends / relatives	64,000	25%
Business	36,000	14%
Other	36,000	14%

Purpose of visit	Nights	Share of nights
Holiday	681,000	32%
Visiting friends / relatives	434,000	21%
Business	244,000	12%
Other	746,000	35%

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

On average, Italian tourists spent €914 / £797 per trip or €111 / £96 per night and stayed 8.3 nights on the island of Ireland.

Region	Metric	Value
Island of Ireland	Average spend per trip	€916 / £797
Island of Ireland	Average spend per night	€111 / £96
Island of Ireland	Average length of stay	8.3 nights
Northern Ireland	Average spend per trip	£335
Northern Ireland	Average spend per night	£69
Northern Ireland	Average length of stay	4.8 nights

## How did our tourists spend their money?

Almost two-fifths (38%) of Italian tourists' revenue was spent on accommodation.

Category	Share of spend
Accommodation	38%
Food & Drink	31%
Shopping	14%
Transport	9%
Entertainment	8%
Miscellaneous	1%

## How long did our tourists stay?

Around three-quarters (72%) stayed four or more nights on the island of Ireland.

Length of stay	Share of trips
1-3 nights	28%
4-5 nights	28%
6-8 nights	23%
9+ nights	21%

# 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, the South-West and the West were the most popular regions for Italian tourists and holidaymakers, though the order varied with holidaymakers favouring the West over the South-West.

Region	Share of tourists
Dublin	66%
Midlands / Mid-East	12%
South-East	6%
South-West	17%
Mid-West	7%
West	15%
Border	3%
Northern Ireland	6%

Region	Share of holidaymakers
Dublin	83%
Midlands / Mid-East	5%
South-East	5%
South-West	22%
Mid-West	7%
West	29%
Border	7%
Northern Ireland	9%

## Where did our tourists and holidaymakers visit?

Holidaymakers are more than twice as likely to do a Dublin+ trip than tourists (31% vs. 14% respectively).

Region	Share of tourists
Dublin only	52%
Outside Dublin only	34%
Both Dublin and outside Dublin	14%

Region	Share of holidaymakers
Dublin only	52%
Outside Dublin only	17%
Both Dublin and outside Dublin	31%

## Inbound Holidaymakers

Italy was the island's sixth-largest source of holidaymakers and holiday revenue and the eighth-largest source of holiday nights. Italian holidaymakers stayed for an average of 5.7 nights on the island of Ireland. Those visiting Northern Ireland stayed an average of 3.1 nights.

Metric	Value	Global Rank
Revenue	€107 million / £93 million	6th
Trips	120 thousand	6th
Nights	681 thousand	8th

Region	Metric	Value
Island of Ireland	Average spend per trip	€887 / £772
Island of Ireland	Average spend per night	€156 / £136
Island of Ireland	Average length of stay	5.7 nights
Northern Ireland	Average spend per trip	£298
Northern Ireland	Average spend per night	£96
Northern Ireland	Average length of stay	3.1 nights

## When did our holidaymakers visit?

The second half of the year (July -December) accounted for 56% of trips.

Quarter	Share of visits
Quarter 1	21%
Quarter 2	22%
Quarter 3	35%
Quarter 4	21%

## How long did our holidaymakers stay?

The majority (62%) of Italian holidaymakers stayed up to five nights on the island of Ireland.

Length of stay	Share of trips
1-3 nights	35%
4-5 nights	29%
6-8 nights	19%
9+ nights	16%

## What age were our holidaymakers?

The majority (54%) of Italian holidaymakers were aged under 35.

Age	Share of trips
<25 years	24%
25-34 years	30%
35-44 years	18%
45-54 years	19%
55-64 years	8%
65+ years	1%

## Holidaymaker gender and dependent children

There was a bias towards female Italian holidaymakers visiting the island of Ireland. A fifth (21%) of Italian holidaymakers had dependent children in the household (whether empty nesters or pre-children).

Gender	Share of trips
Female	57%
Male	43%

## Had our holidaymakers been here before?

It was a first visit for three-quarters (75%) of Italian holidaymakers.

Visitor type	Share of trips
First visit	75%
Repeat visit	25%

## Who did our holidaymakers travel with?

Half of Italian holidaymakers travelled with their spouse/partner. A fifth (21%) visited with other adults.

Party composition	Share of trips
Solo	18%
Couple	48%
Family	13%
Other adult party	21%

## Where did our holidaymakers stay?

The majority (62%) of nights stayed by Italian holidaymakers were in hotels (38%) and B&Bs or guesthouses (24%).

Accommodation type	Share of nights
Hotel	38%
Guesthouse / B&B	24%
Hostels	11%
Rented accommodation	9%
Friends / family	6%
Caravan / camping	6%
On campus	3%
With host family	2%

## How did our holidaymakers travel and get around

The majority (97%) of Italian holidaymakers travelled independently, 3% travelled as part of a package, and a third (34%) used a car while on the island of Ireland.

Car use	Share of trips
Hired a car	30%
Brought own car	2%
Borrowed a car	2%
Did not use a car	66%

## What were our holidaymakers' interest and activities?

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

95% visited historical or cultural sites.

Type of activity	Share of trips
Churches or cathedrals	79%
Heritage centres	64%
Monuments	64%
Museums or art galleries	58%
Castles or houses	54%
Ancient Celtic sites	24%

88% engaged in pastimes and events.

Type of activity	Share of trips
Shopping excluding food, drink, and souvenirs	63%
Gardens	58%
National parks including forests	55%
Festivals or cultural events including concerts	20%
Traced roots	2%

35% participated in active pursuits.

Type of activity	Share of trips
Hiking including cross-country walking	31%
Water-based activities excluding fishing and swimming	6%
Cycling	5%
Equestrian	1%
Golf	1%

## Likelihood to recommend a holiday in Ireland to others

The majority (83%) of Italian holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the scenery and nature (41%), friendly people (39%), and Dublin is great (19%).

# Outbound holidaymakers

## Sources of inspiration, research and planning

Outbound holidaymakers from Italy 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
Online search	42%
Family and friends' recommendations	40%
Travel websites including company websites and booking platforms	30%
Destination websites	26%
Travel articles / blogs	24%
Films, TV shows, travel shows	17%
Guidebooks	16%

Channel	Share of holidaymakers' research and planning
Online search	55%
Travel websites including company websites and booking platforms	45%
Destination websites	41%
Travel articles / blogs	27%
Family and friends' recommendations	25%
Guidebooks	19%
Social media	14%

## **Enrichment Explorers**

Our target segment makes up 26% of all Italian 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**

Italy was the world's tenth-largest outbound market in 2024 and 83% of all outbound trips from Italy were to other parts of Europe.

## Access by air

There were almost 1.2 million direct one-way air seats available on 6,436 flights from Italy to the island of Ireland in 2024. There were 20 gateways from Italy, operated by 3 carriers to 5 airports on the island of Ireland.

### Where can our tourists fly from?

The top ten Italian airports accounted for the majority (88%) of seats in 2024. Rome (Fiumicino), Milan (Bergamo), and Venice (Marco Polo) accounted for half (52%) of seats.

Airports in Italy	Share of seats
Rome Fiumicino	25%
Milan Bergamo / Orio al Serio	16%
Venice	10%
Naples	8%
Milan Malpensa	8%
Pisa	6%
Milan Linate	5%
Verona	4%
Turin	3%
Bologna	2%

### Who can our tourists fly with?

Three carriers operated between Italy and the island of Ireland. In 2024, Ryanair was responsible for delivering the majority (69%) of seats to the island of Ireland.

Carrier	Share of seats
Ryanair	69%
Aer Lingus	30%
Jet2	1%