

ITALY

MARKET PROFILE

2024



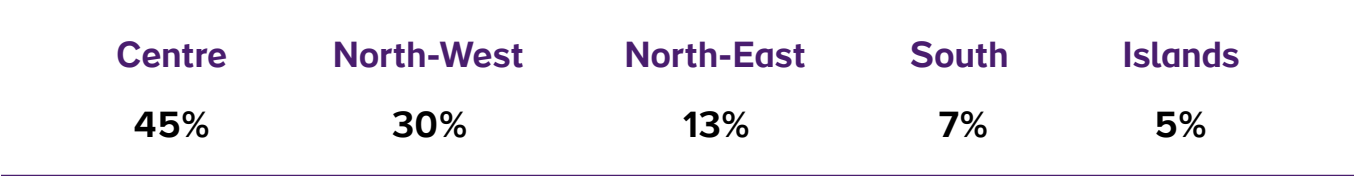
INBOUND TOURISTS

The island of Ireland welcomed around 254,000 Italian tourists who spent over €233/£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.



WHERE DID OUR TOURISTS COME FROM?

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



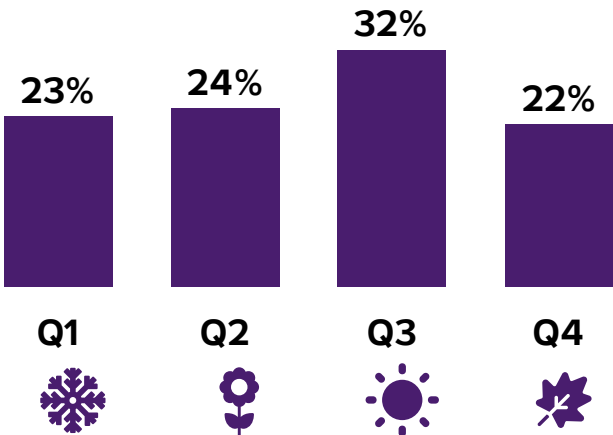
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?





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



INBOUND TOURISTS


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.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€107/£93m	46%	120k	47%	681k	32%
 VFR	€27/£24m	12%	64k	25%	434k	21%
 BUSINESS	€37/£33m	16%	36k	14%	244k	12%
 OTHER	€62/£54m	26%	36k	14%	746k	35%


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

On average, Italian tourists spent €916/£797 per trip or €111/£96 per night and stayed 8.3 nights on the island of Ireland.




€916/£797 (IOI)
£335 (NI)

Av. spend per trip



€111/£96 (IOI)
£69 (NI)

Av. spend per night









8.3 (IOI)
4.8 (NI)

Av. stay (nights)

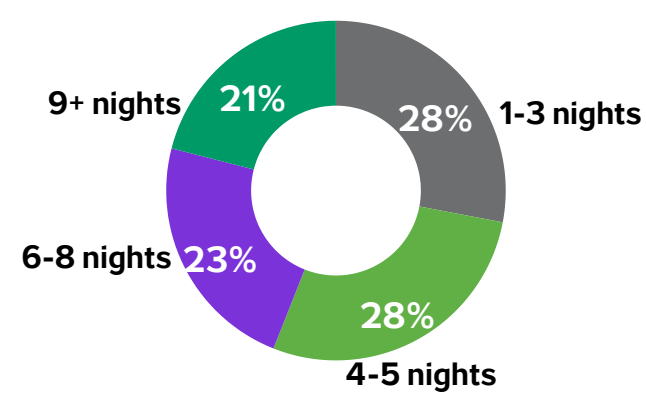
HOW DID OUR TOURISTS SPEND THEIR MONEY?

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

Accomm.  38%	Food & Drink  31%	Shopping  14%
Transport  9%	Entertainment  8%	Misc.  1%

HOW LONG DID OUR TOURISTS STAY?

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



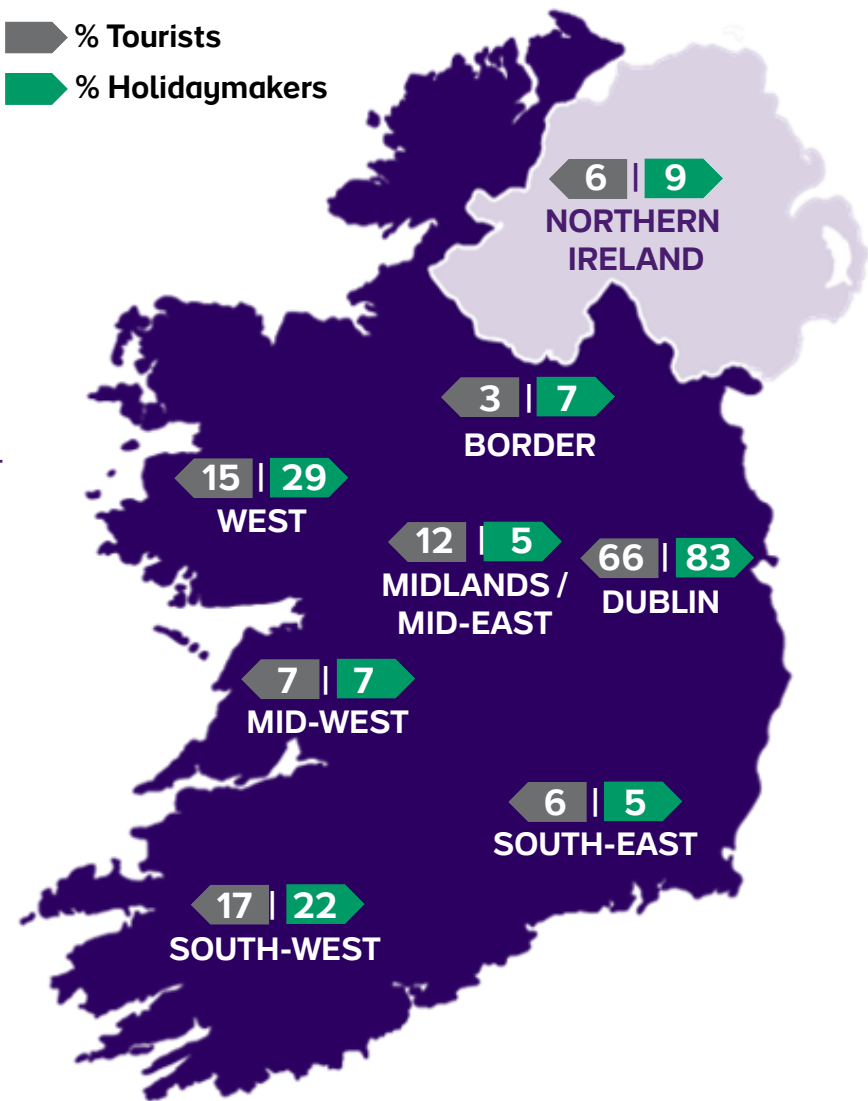
INBOUND TOURISTS AND HOLIDAYMAKERS

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 though the order varied with holidaymakers favouring the West over the South-West.

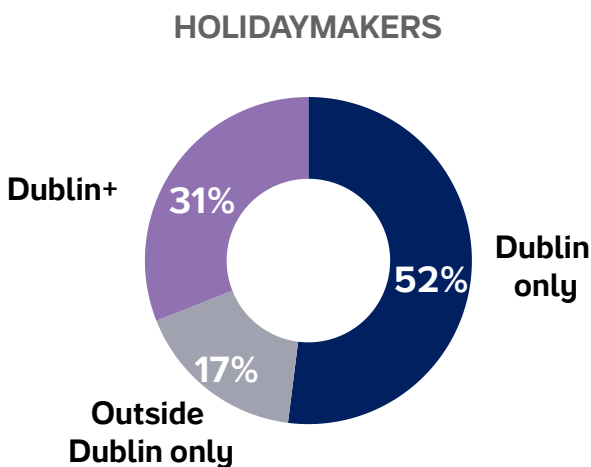
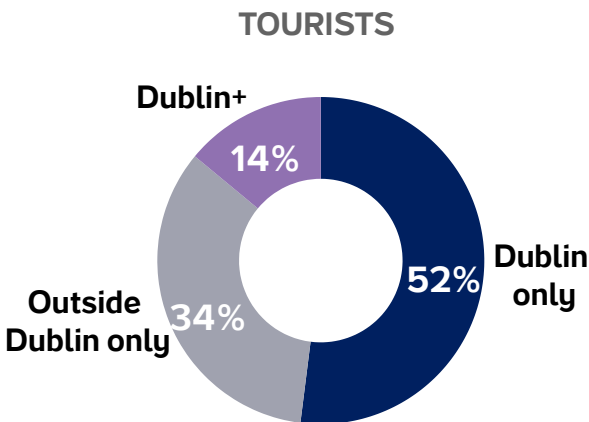
Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	South-West	West
#3	West	South-West

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



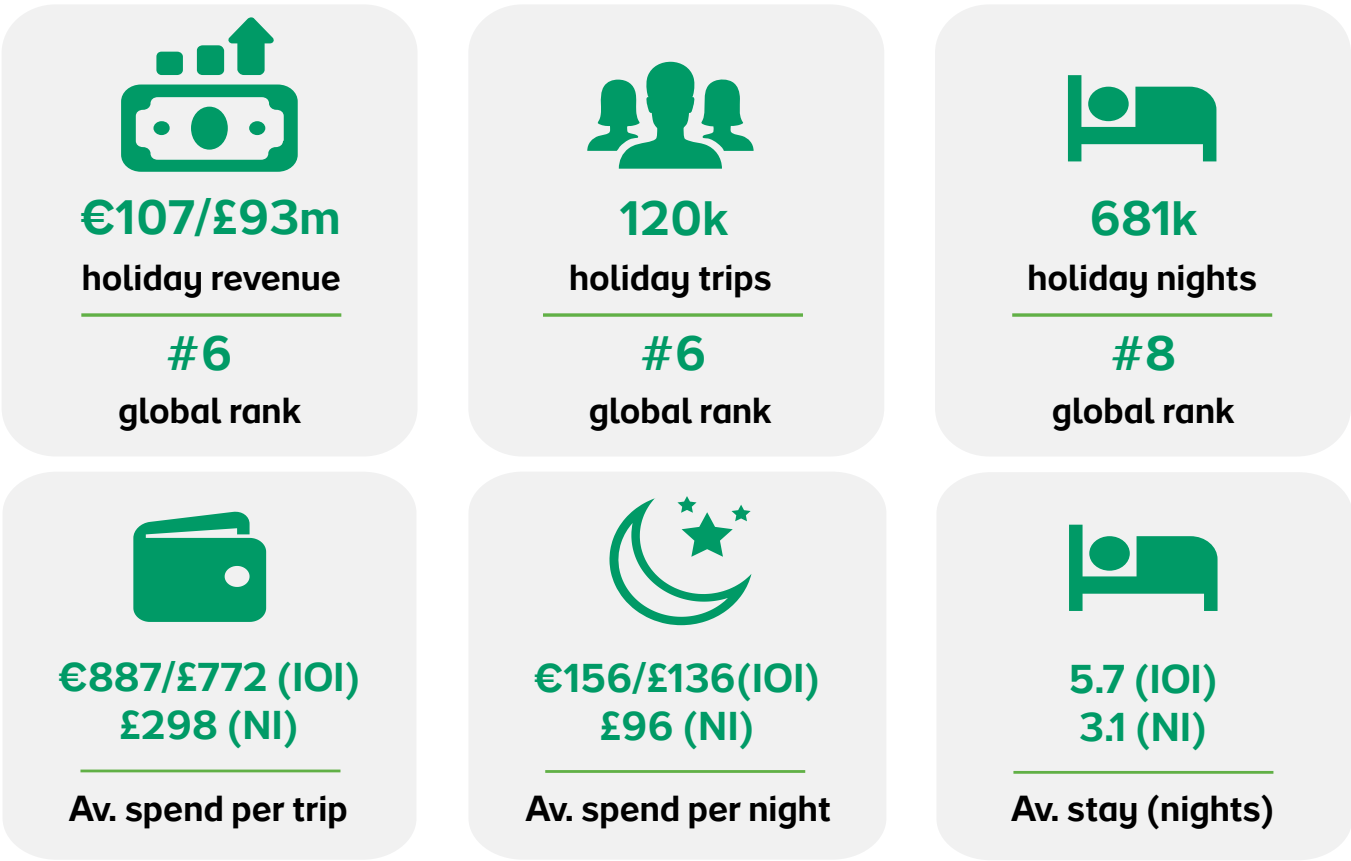
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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



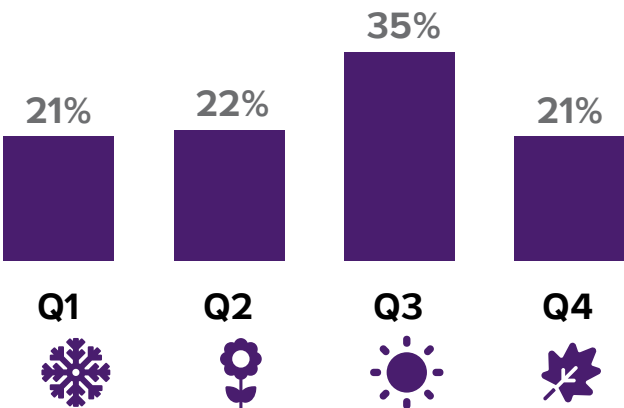
INBOUND HOLIDAYMAKERS

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.



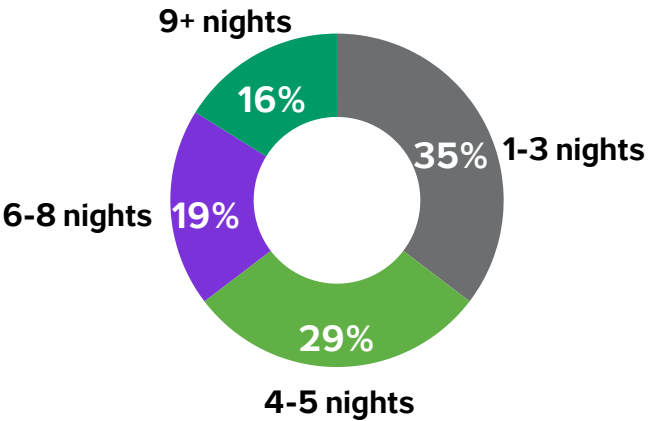
WHEN DID OUR HOLIDAYMAKERS VISIT?

The second half of the year (H2 = July-December) accounted for 56% of trips.



HOW LONG DID OUR HOLIDAYMAKERS STAY?

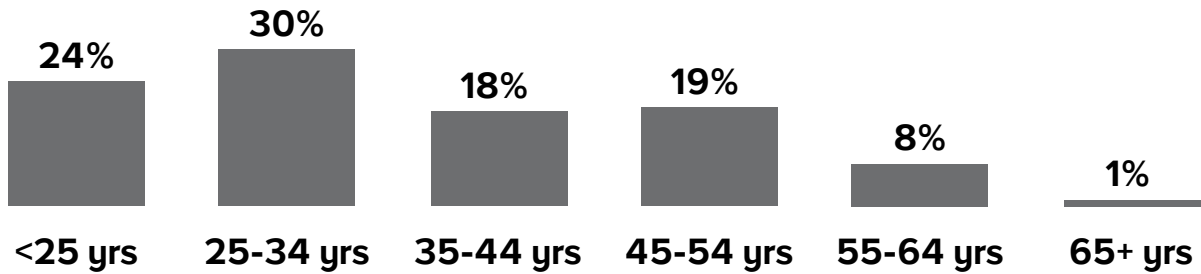
The majority (62%) of Italian holidaymakers stayed up to five nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

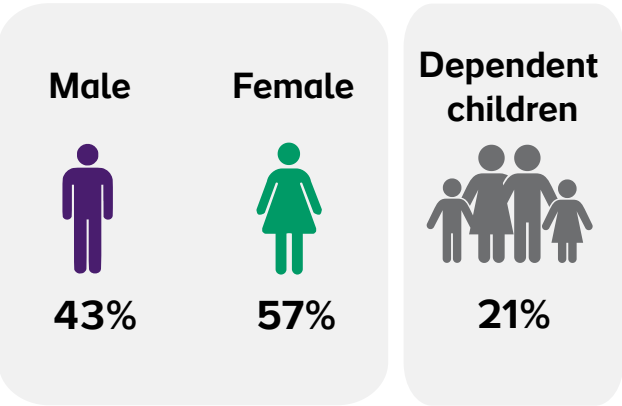
WHAT AGE WERE OUR HOLIDAYMAKERS?

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



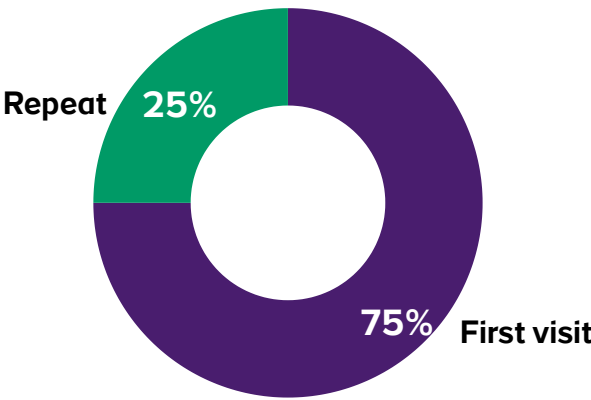
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

There was a bias towards female Italian holidaymakers visiting the island of Ireland. A fifth (18%) of Italian holidaymakers had dependent children in the household (whether empty nesters or pre-children).



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

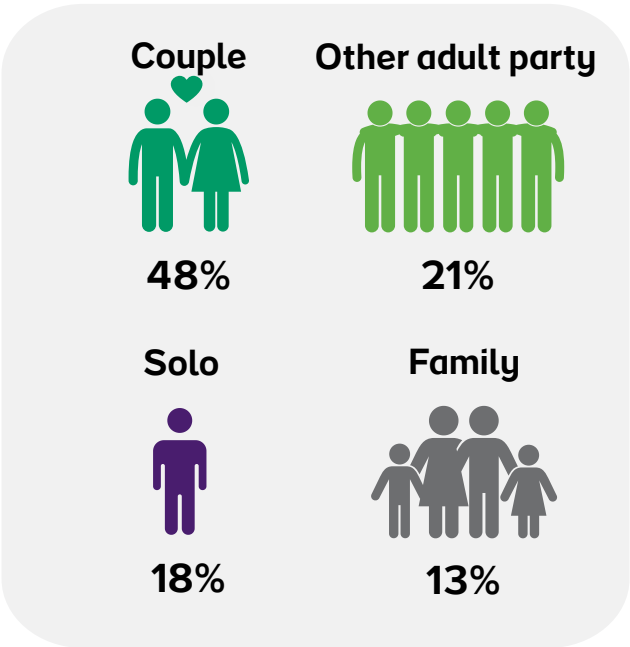
It was a first visit for three-quarters (75%) of Italian holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Half of Italian holidaymakers travelled with their spouse/partner.

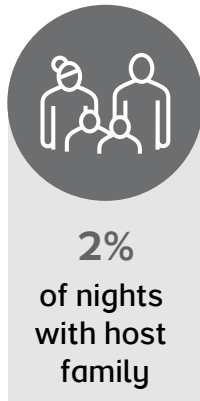
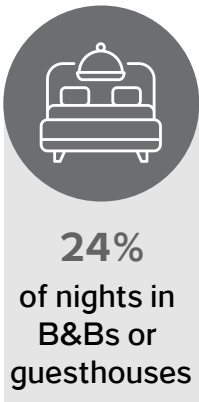
A fifth (21%) visited with other adults.



INBOUND HOLIDAYMAKERS

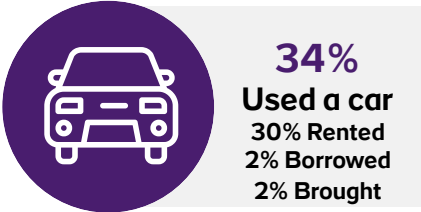
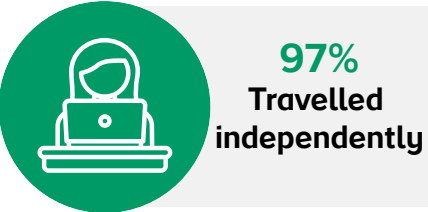
WHERE DID OUR HOLIDAYMAKERS STAY?

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



HOW DID OUR HOLIDAYMAKERS TRAVEL & GET AROUND?

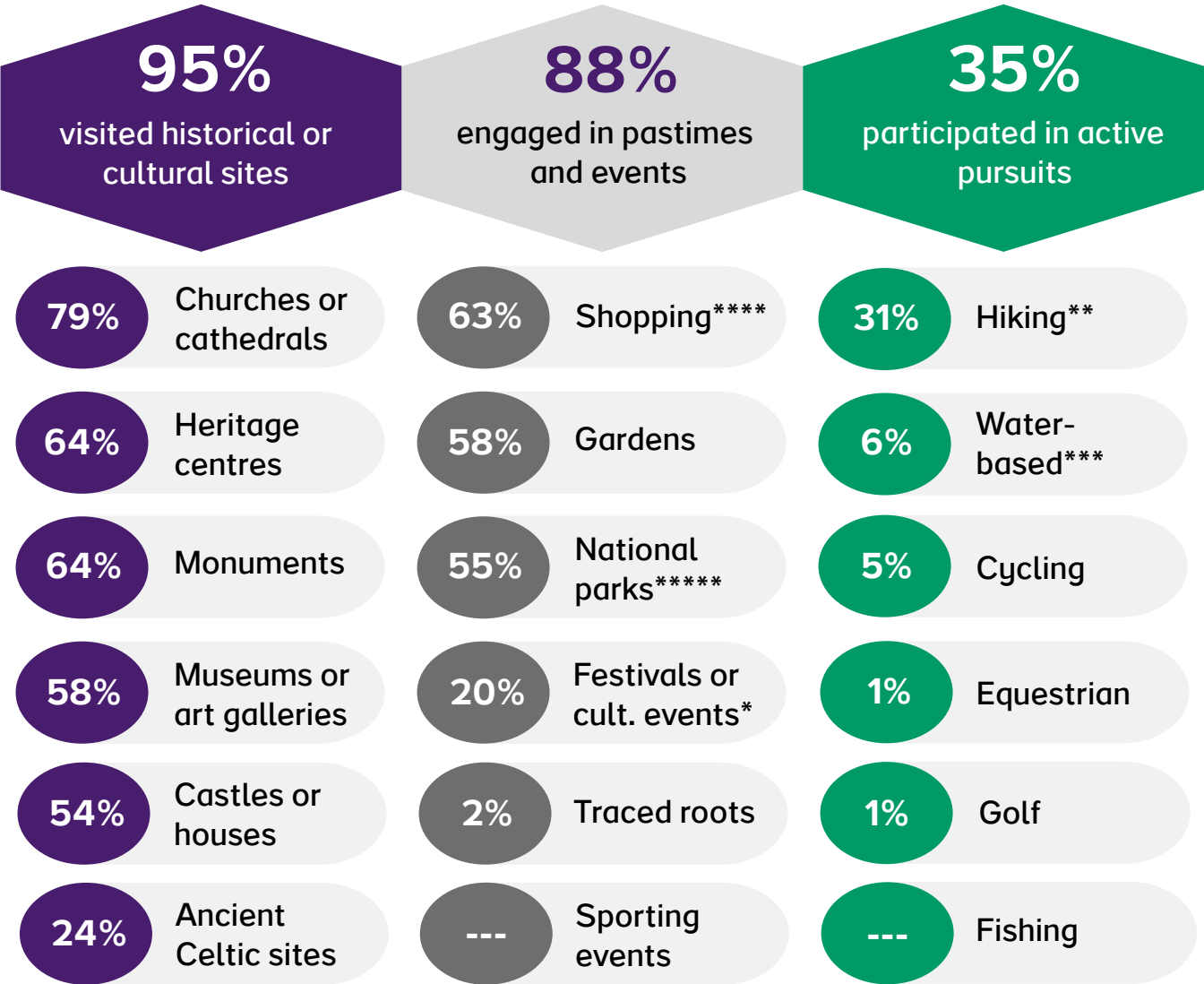
The majority (97%) of Italian holidaymakers travelled independently and a third (34%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

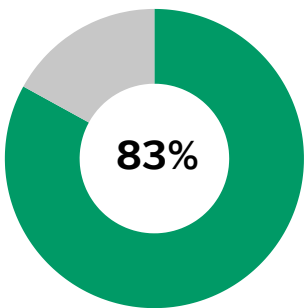
Italian holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



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

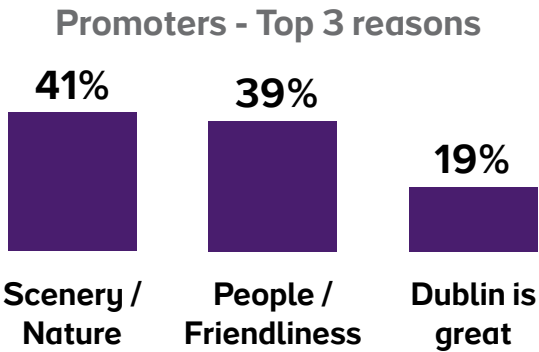
LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS

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



**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

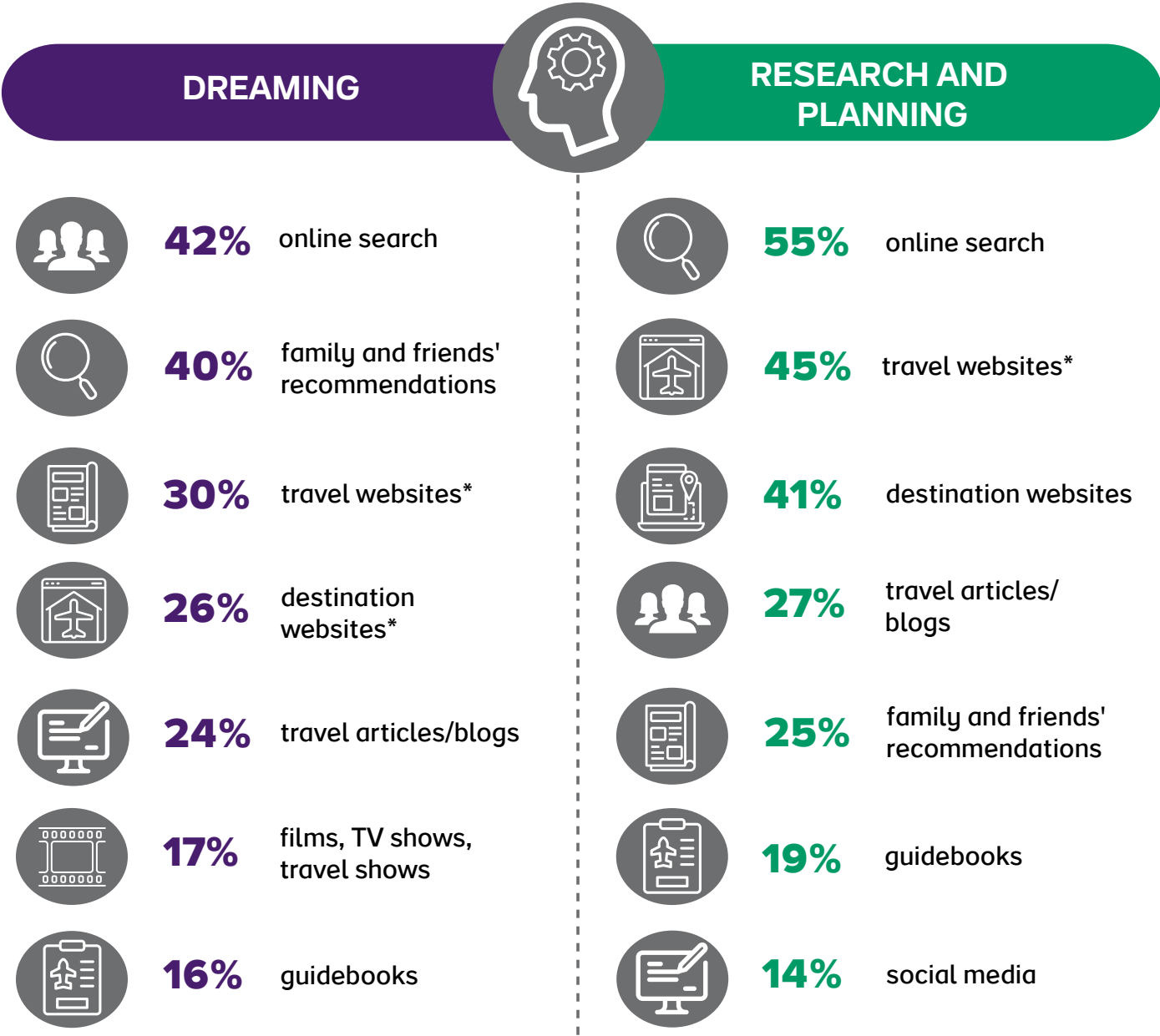


OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

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

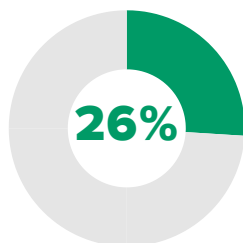
While social media, for example, is cited in its own right, it's often also a channel for the discovery of travel articles and recommendations.



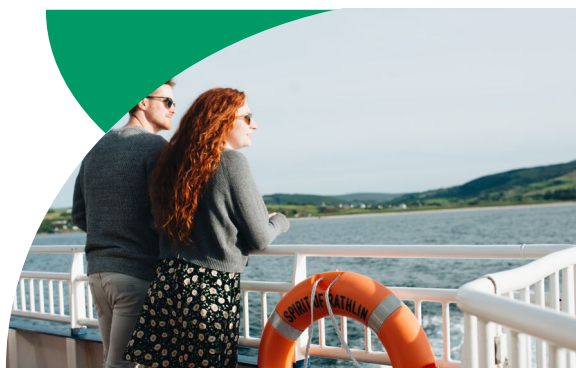
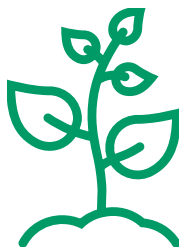
*Travel websites include company websites and booking platforms

ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



of 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 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

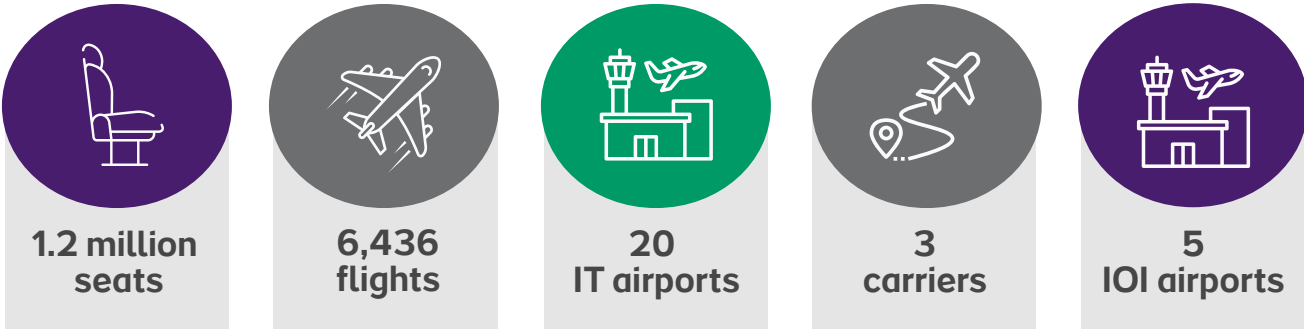
- | | | | | | |
|---|---|--|----|---|---|
| 1 |  | To feel connected to nature | 6 |  | To experience living like a local |
| 2 |  | To broaden and stimulate my mind | 7 |  | To enjoy authentic moments with friendly locals |
| 3 |  | To feel the character of the place and people | 8 |  | To be transported 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

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

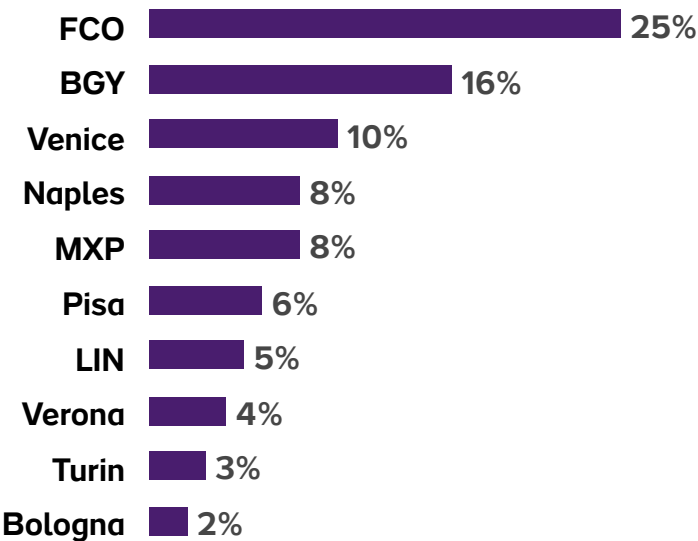
There were almost 1.2 million direct one-way air seats available on over 6,000 flights from Italy to the island of Ireland in 2024. There were 20 gateways from Italy to airports on the island of Ireland.



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.

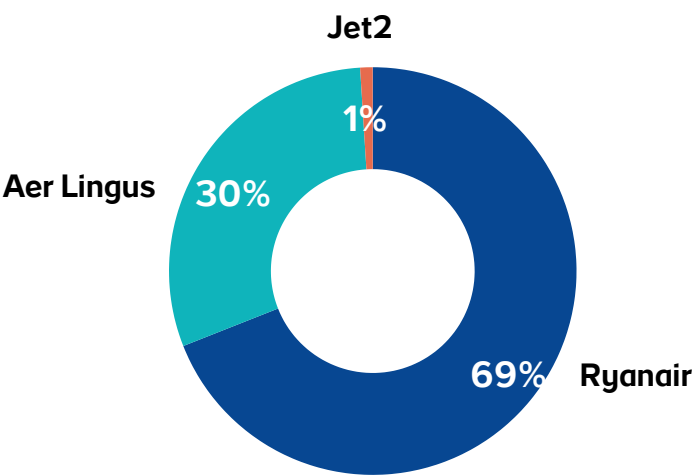
Share of seats by airport (Top 10)



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.

Share of seats by carrier



FCO: Rome Fiumicino, BGY: Milan Bergamo/Orio al Serio, VCE: Venice Marco Polo, NAP: Naples Capodichino, MXP: Milan Malpensa, PSA: Pisa, LIN: Milan Linate, VRN: Verona Villafranca Airport, TRN: Turin Caselle, BLQ: Bologna Guglielmo Marconi.