

ITALY

MARKET PROFILE 2025



INBOUND TOURISTS

The island of Ireland welcomed around 224,000 Italian tourists, who spent over €230/£200 million and stayed 2.2 million nights in 2025. This makes Italy the island's sixth-largest source of overseas revenue and nights and seventh-largest source of tourists.

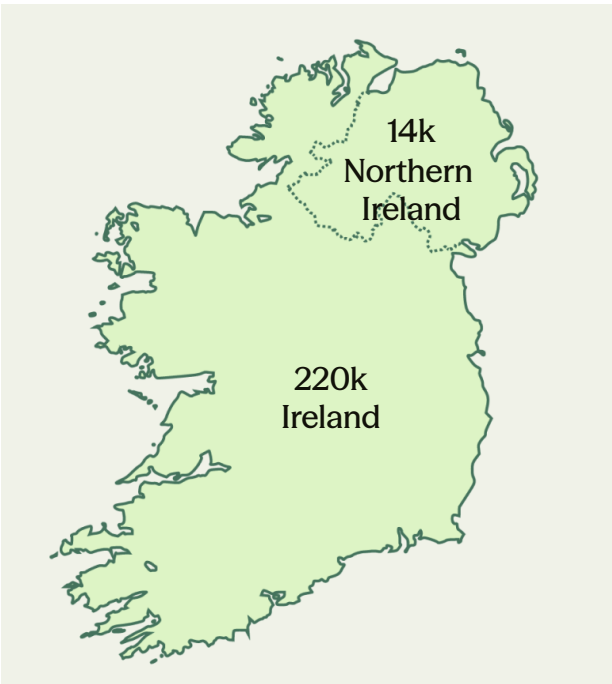


WHERE DID OUR TOURISTS COME FROM?

Over one-third (37%) of Italian tourists visiting the island of Ireland in 2025 came from the North-West and a further one-third from the Centre.

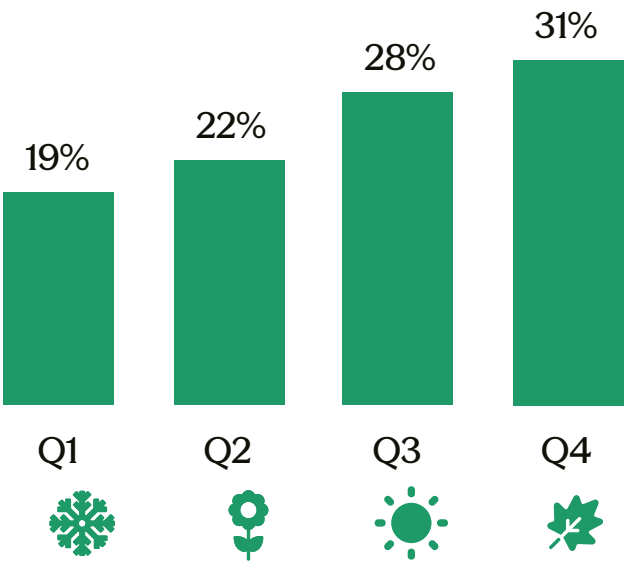


WHERE DID OUR TOURISTS VISIT?



WHEN DID OUR TOURISTS VISIT?

Italian visits are concentrated in the latter half of the year, with six in ten visits occurring in Q3 and Q4.



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

INBOUND TOURISTS

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Almost half (45%) of Italian tourists visiting the island of Ireland in 2025 came for a holiday, accounting for 40% of Italian tourism revenue. Almost a quarter (23%) were visiting friends and/or relatives (VFR). Around one-fifth were visiting for "other reasons" (such as learning English as a foreign language), accounting for the largest share (45%) of Italian tourism nights.

		REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
	HOLIDAY	€92/£80m	40%	102k	45%	656k	29%
	VFR	€22/£19m	10%	51k	23%	315k	14%
	BUSINESS	€30/£26m	13%	28k	12%	252k	11%
	OTHER	€86/£75m	37%	46k	20%	1.0m	45%

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

On average, Italian tourists spent €1,027/£893 per trip or €103/£90 per night and stayed 10 nights on the island of Ireland in 2025.



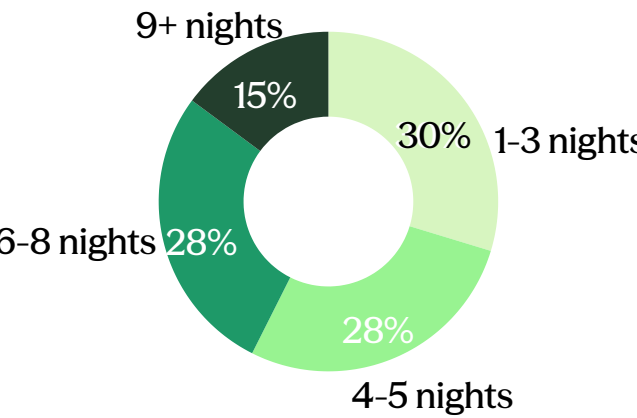
HOW DID OUR TOURISTS SPEND THEIR MONEY?

Food and drink accounted for the largest share of Italian tourist spend, at 35%, well ahead of accommodation and all other trip costs.

Food & drink	Accomm.	Shopping
		
35%	22%	20%
Transport	Entertainment	Misc.
		
12%	9%	1%

HOW LONG DID OUR TOURISTS STAY?

The majority (57%) visited the island of Ireland for up to five nights.



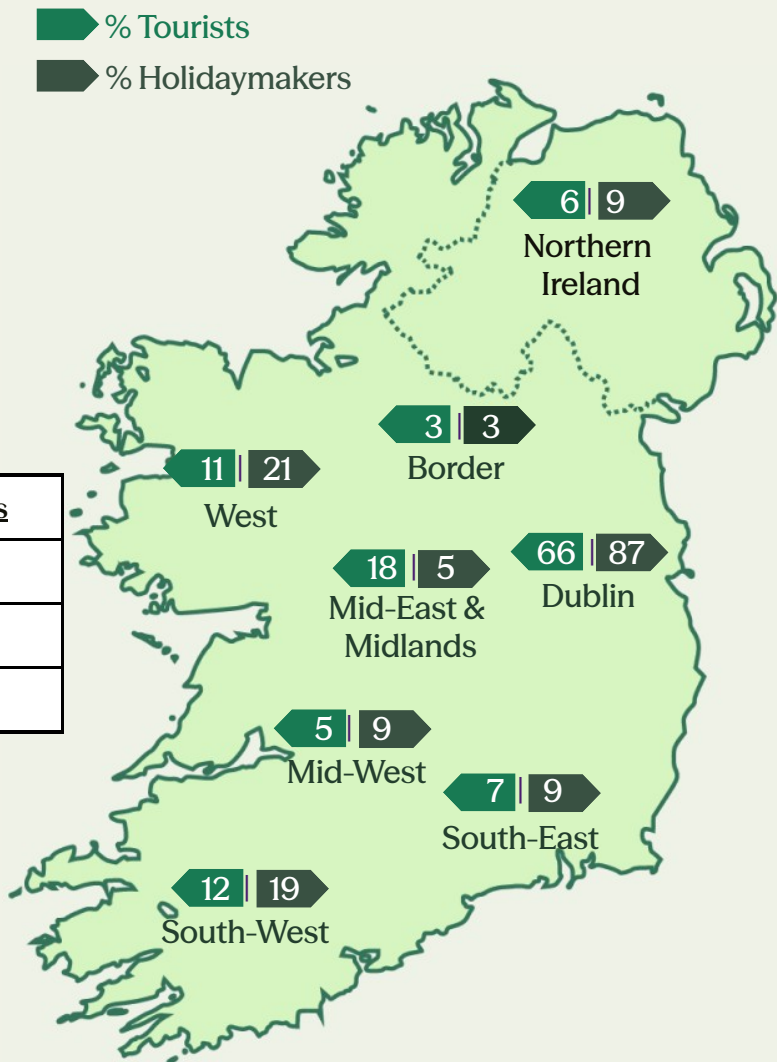
INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin and the South-West were two of the top three most popular areas for both Italian tourists and holidaymakers. Tourists also favoured the Mid-East & Midlands, while holidaymakers were drawn to the West.

Almost 10,000 Italian tourists and 6,000 holidaymakers overnighted on both sides of the border.

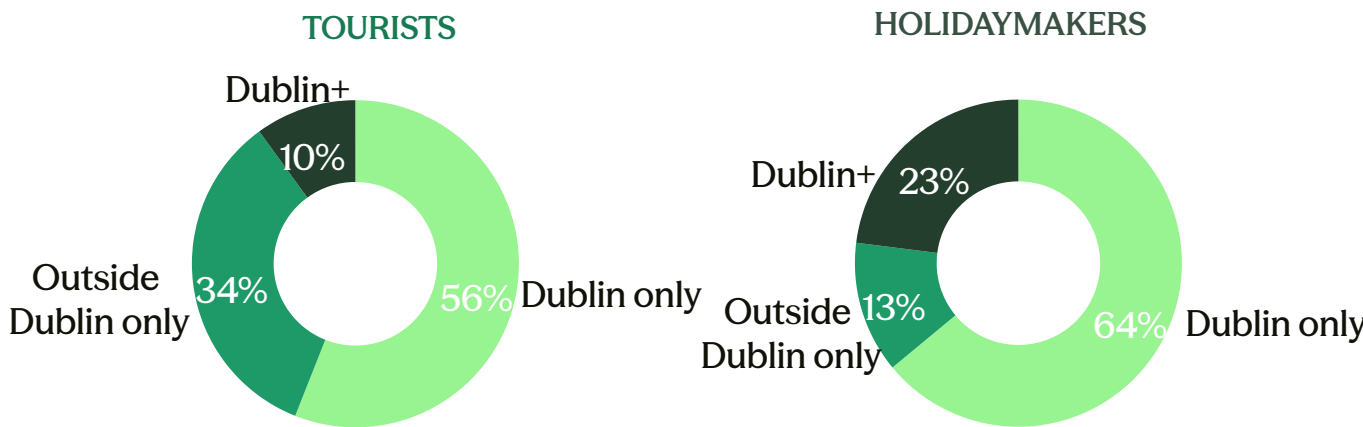
Top	Tourists	Holidaymakers
1	Dublin	Dublin
2	Mid-East & Midlands	West
3	South-West	South-West



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 visit both Dublin and other areas outside Dublin than tourists (23% vs 10% respectively).



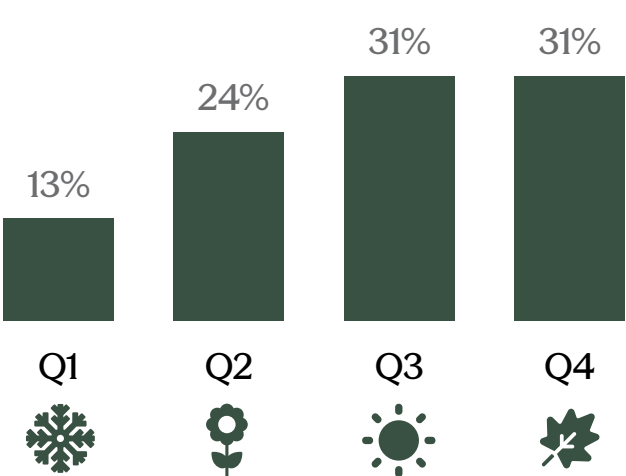
INBOUND HOLIDAYMAKERS

Italy was the island of Ireland’s seventh-largest source of holiday revenue and nights and the sixth-largest in terms of holidaymakers. Italian holidaymakers stayed for an average of 6.5 nights on the island of Ireland. Those visiting Northern Ireland stayed for an average of 3.1 nights.



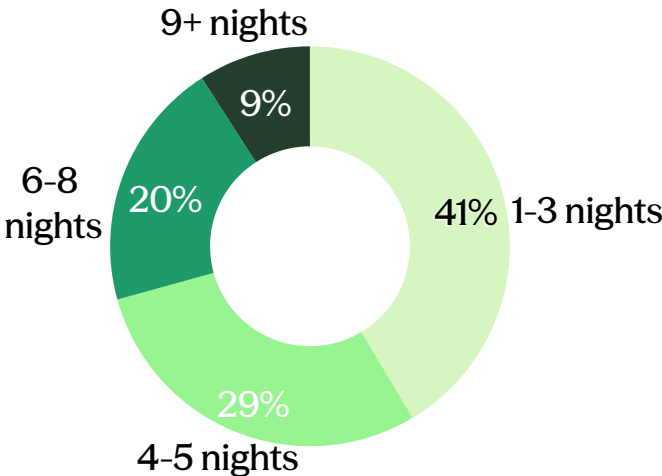
WHEN DID OUR HOLIDAYMAKERS VISIT?

Italian holiday trips peak in the second half of the year.



HOW LONG DID OUR HOLIDAYMAKERS STAY?

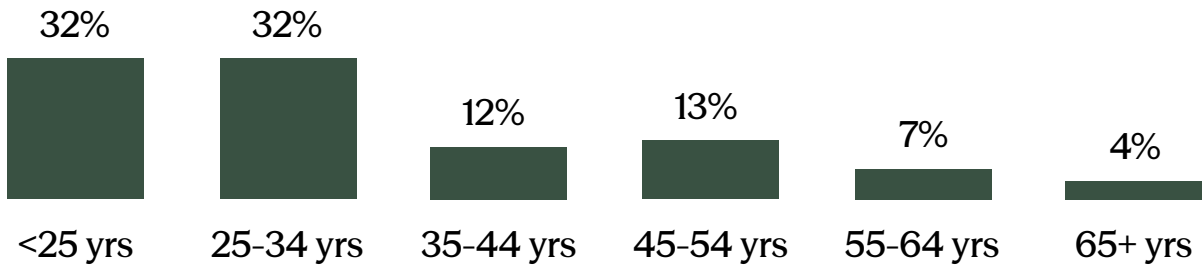
Short breaks dominate Italian holiday trips to the island of Ireland, though longer stays remain common.



INBOUND HOLIDAYMAKERS

WHAT AGE WERE OUR HOLIDAYMAKERS?

Around two-thirds of Italian holidaymakers were under 35 years old.

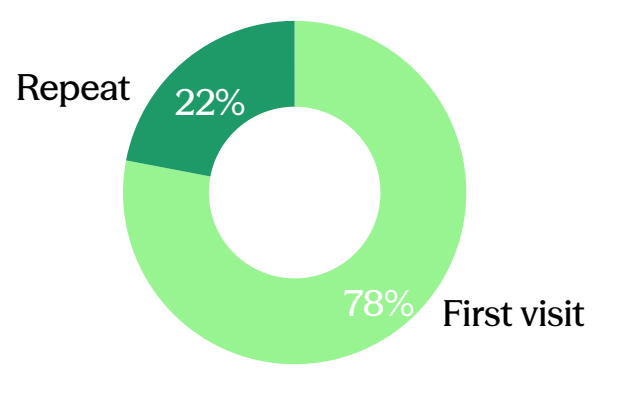
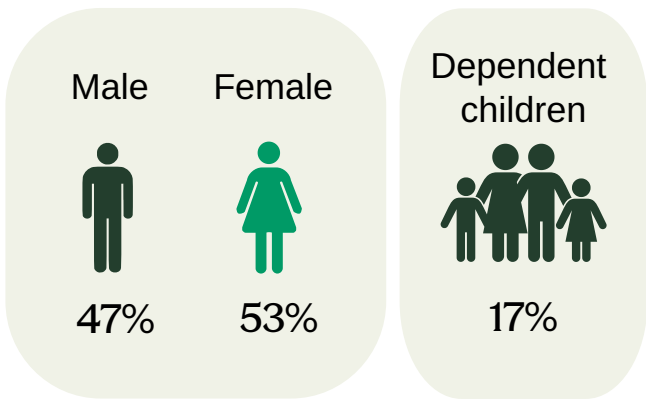


HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN*

A fifth (17%) of Italian holidaymakers had dependent children in their household.

HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

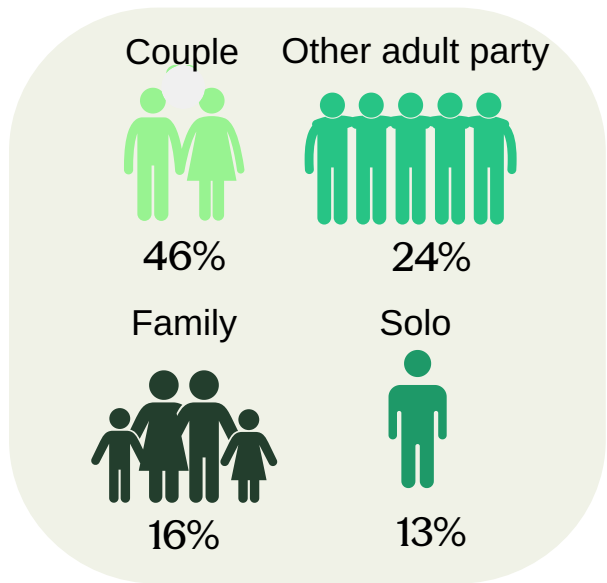
It was a first visit for the majority (78%) of Italian holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Almost half (46%) of Italian holidaymakers visited with their partner/spouse.

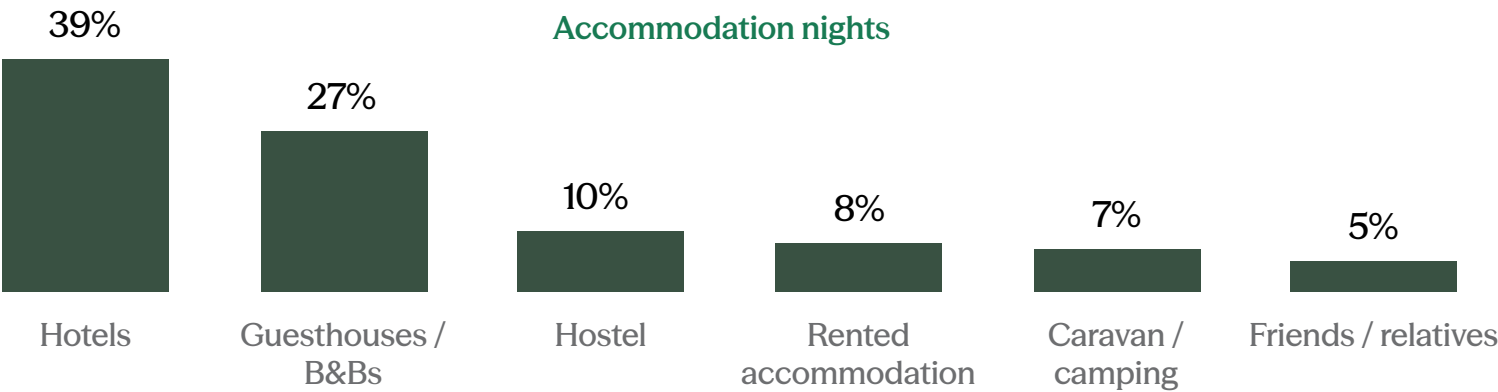
Just under a quarter (24%) travelled as part of an adult party.



INBOUND HOLIDAYMAKERS

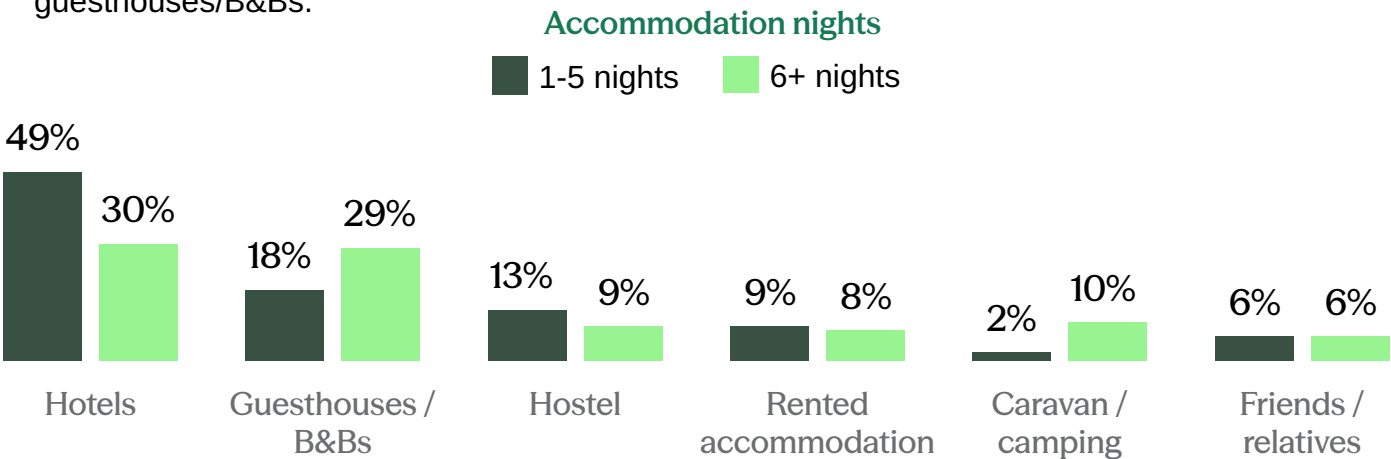
WHERE DID OUR HOLIDAYMAKERS STAY?

The majority (66%) of nights stayed by Italian holidaymakers were in hotels (39%) and guesthouses/B&Bs (27%).



HOW DID ACCOMMODATION CHOICE VARY BY LENGTH OF STAY?*

Hotels and guesthouses/B&Bs are the preferred choices of accommodation, regardless of length of stay. However, hotels were especially popular among Italian holidaymakers on short breaks (1–5 nights), while longer-staying holidaymakers were more likely to stay in guesthouses/B&Bs.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?*

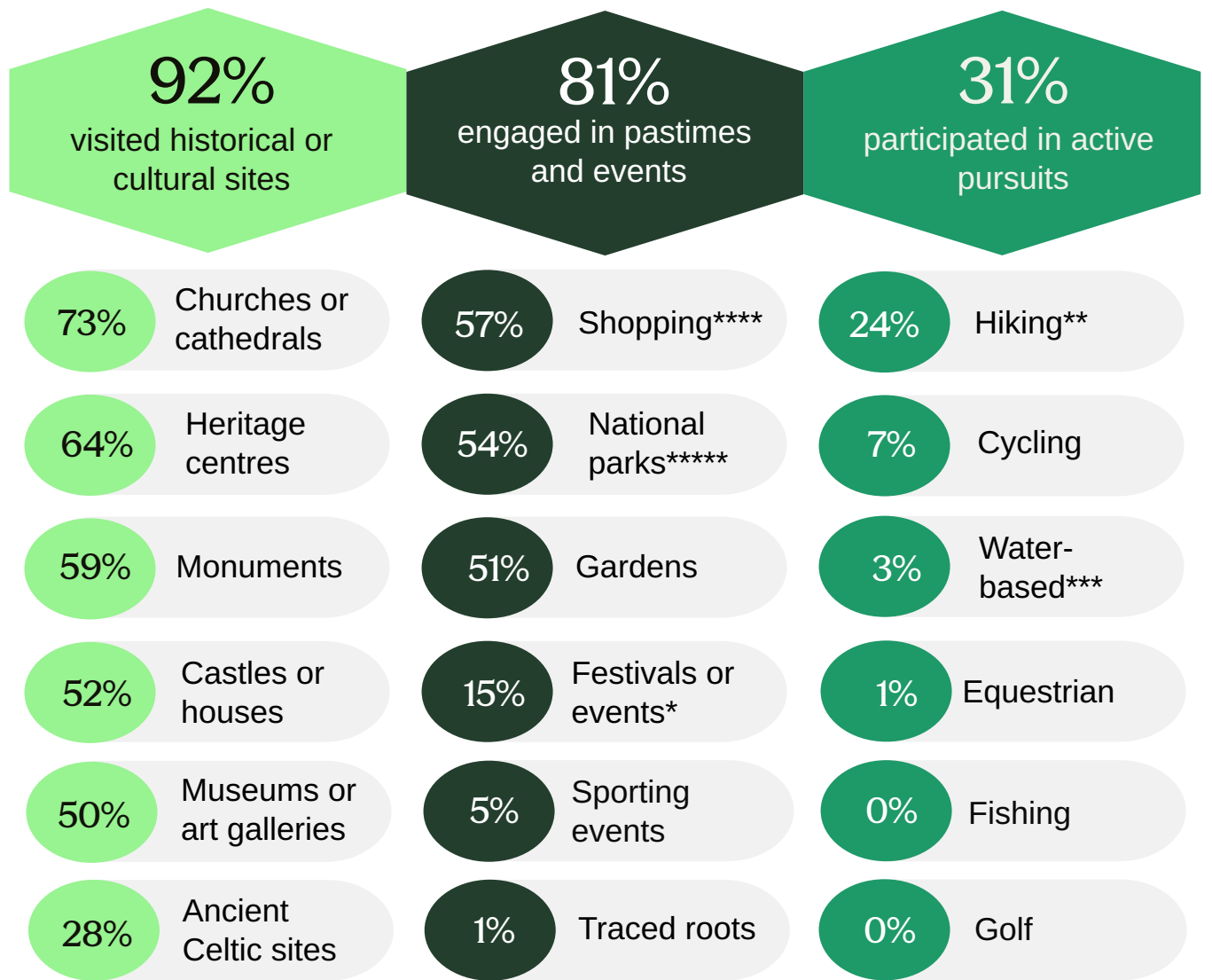
Almost all (99%) Italian holidaymakers travelled independently and around one in four (24%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

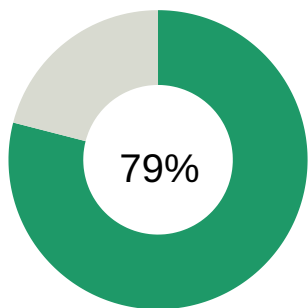
Italian holidaymakers are engaged tourists. They explored our historical sites and engaged in multiple pastimes while on the island of Ireland.



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

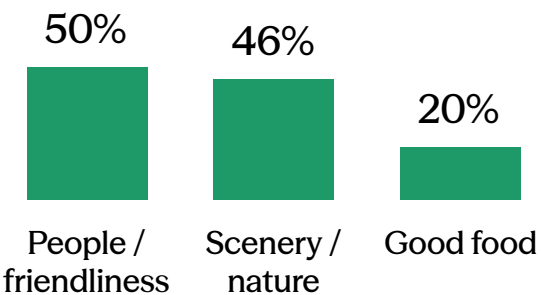
LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS

The majority (79%) of Italian holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (50%), our scenery and nature (46%) and, to a lesser extent, our food (20%).



Promoters (8–10)
"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

Promoters' top 3 reasons



OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from Italy 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.

Online search dominates the Italian holiday journey, from dreaming to booking

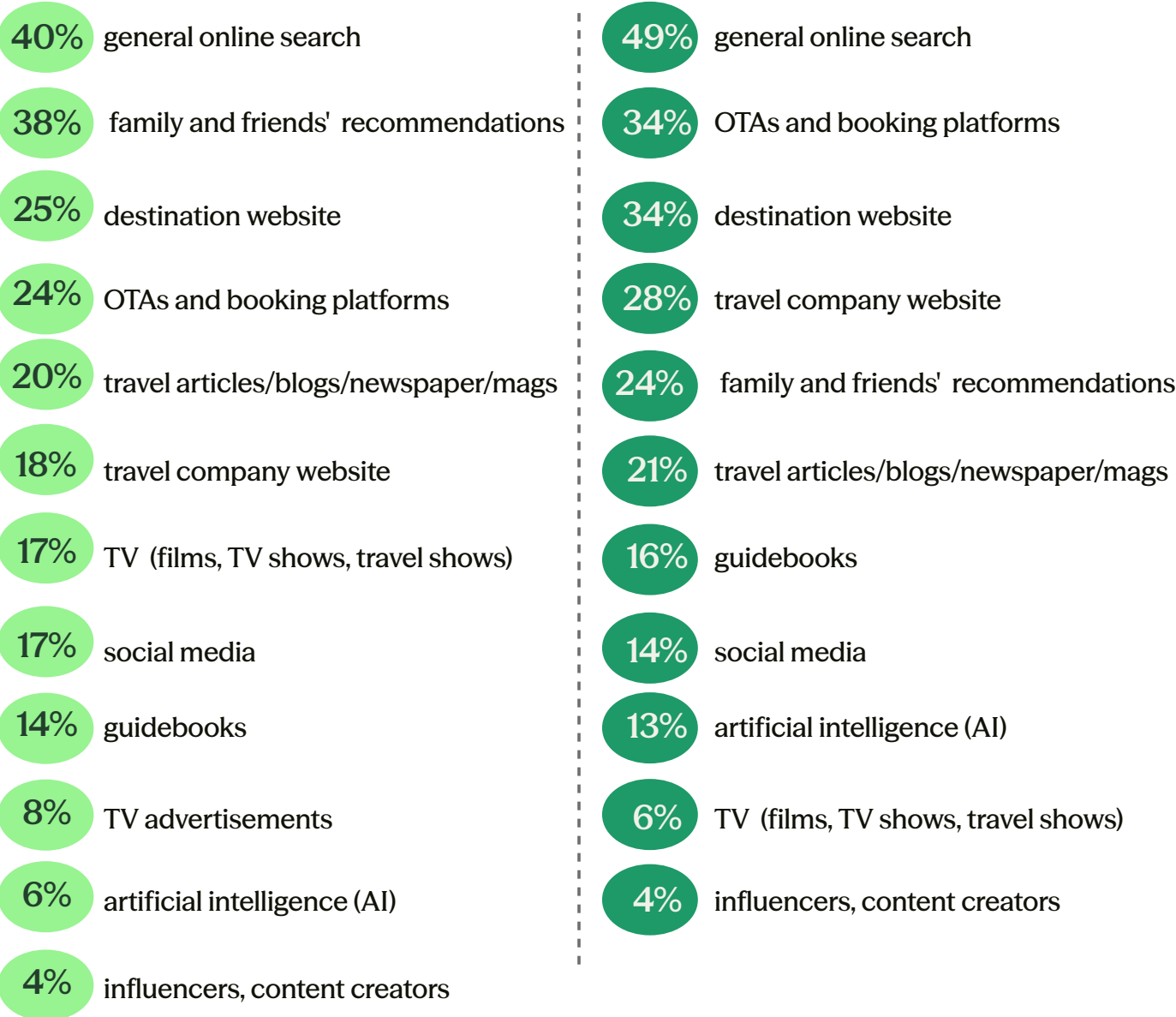
Recommendations from family and friends remain influential, especially for inspiration



DREAMING

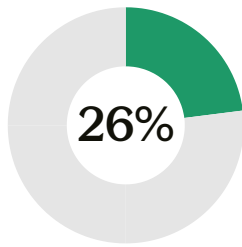
RESEARCH AND PLANNING

BASED ON RESPONDENTS' TOP 3 SOURCES



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 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, Italy was the world’s sixth-largest outbound market, with 82% of its outbound trips going to other parts of Europe.

ACCESS BY AIR

In 2025, almost 6,600 flights from 20 gateways in Italy provided 1.2 million direct one-way air seats to the island of Ireland.



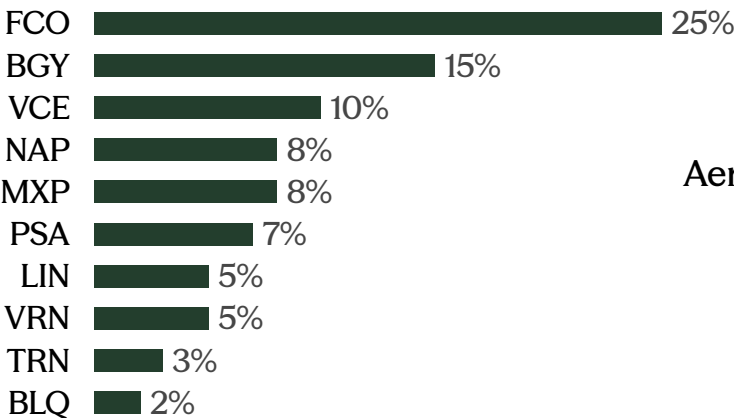
WHERE CAN OUR TOURISTS FLY FROM?

In 2025, the top ten Italian airports accounted for most seats (89%), with Rome, Milan and Venice combined providing exactly half (50%).

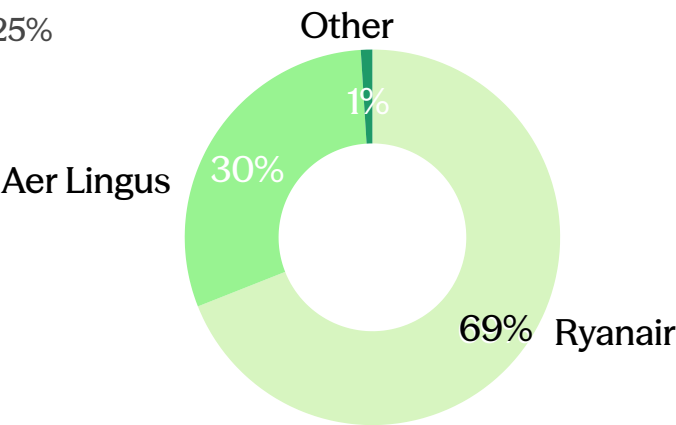
WHO CAN OUR TOURISTS FLY WITH?

Seven carriers operated routes between Italy and the island of Ireland, though Ryanair dominated with 69% of seats and Aer Lingus represented the majority of the remainder.

SHARE OF SEATS BY AIRPORT (TOP 10)



SHARE OF SEATS BY CARRIER



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

Other carriers is comprised of TUI Airways, Jet2, Easyjet, SmartWings and Neos.