



NETHERLANDS

MARKET PROFILE 2025

INBOUND TOURISTS

The island of Ireland welcomed 200,000 Dutch tourists, who spent over €149/£130 million and stayed 1.4 million nights in 2025. This makes the Netherlands the island's eighth-largest source of overseas tourists and the ninth-largest source of overseas revenue and nights.

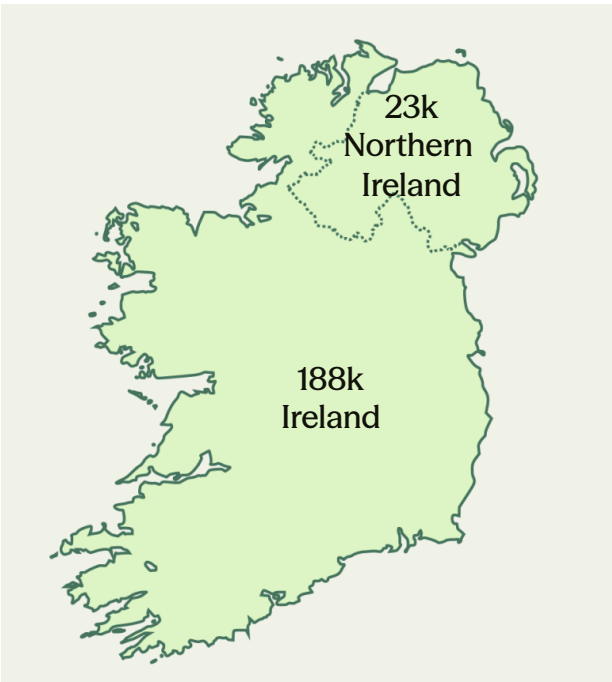


WHERE DID OUR TOURISTS COME FROM?

Almost half (48%) of Dutch tourists visiting the island of Ireland in 2025 came from Holland.

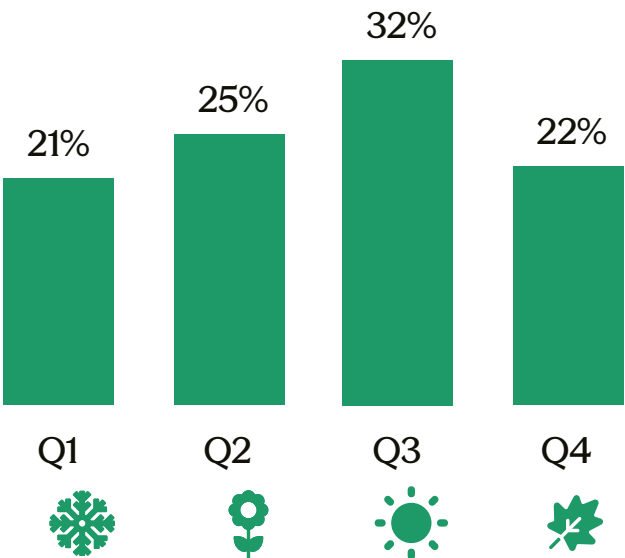
North Holland	South Holland	Gelderland	Utrecht	Friesland	North Brabant	Other
34%	14%	13%	11%	7%	7%	13%

WHERE DID OUR TOURISTS VISIT?



WHEN DID OUR TOURISTS VISIT?

More than half of Dutch tourists (57%) visited the island of Ireland between April and September (Q2 and Q3).



*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?

Two in five (41%) Dutch tourists visiting the island of Ireland in 2025 came for a holiday, accounting for half (50%) of Dutch tourism revenue. Around 34% were visiting friends or relatives (VFR) and they accounted for one-quarter (24%) of Dutch tourism revenue.

		REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
	HOLIDAY	€74/£64m	50%	83k	41%	562k	39%
	VFR	€35/£31m	24%	67k	34%	605k	42%
	BUSINESS	€26/£23m	18%	40k	20%	126k	9%
	OTHER	€13/£12m	9%	11k	6%	144k	10%

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

In 2025, Dutch tourists stayed an average of 7.2 nights on the island of Ireland and spent €745/£649 per trip, equivalent to €104/£90 per night.



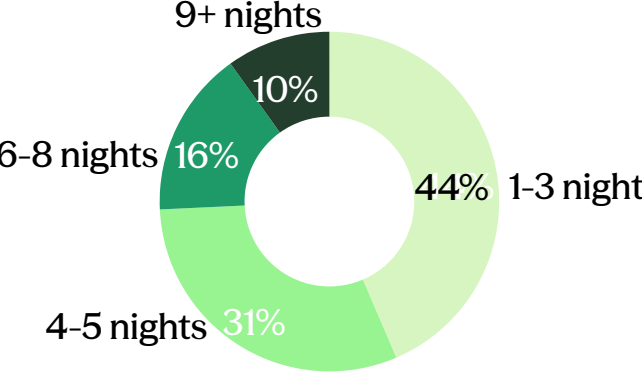
HOW DID OUR TOURISTS SPEND THEIR MONEY?

Food and drink accounted for the largest share of Dutch tourist spend, at 37%, ahead of accommodation and all other trip costs.

Food & drink	Accomm.	Shopping
		
37%	28%	16%
Transport	Entertainment	Misc.
		
11%	7%	2%

HOW LONG DID OUR TOURISTS STAY?

Three-quarters of Dutch tourists visited the island of Ireland for a short break of up to five nights.



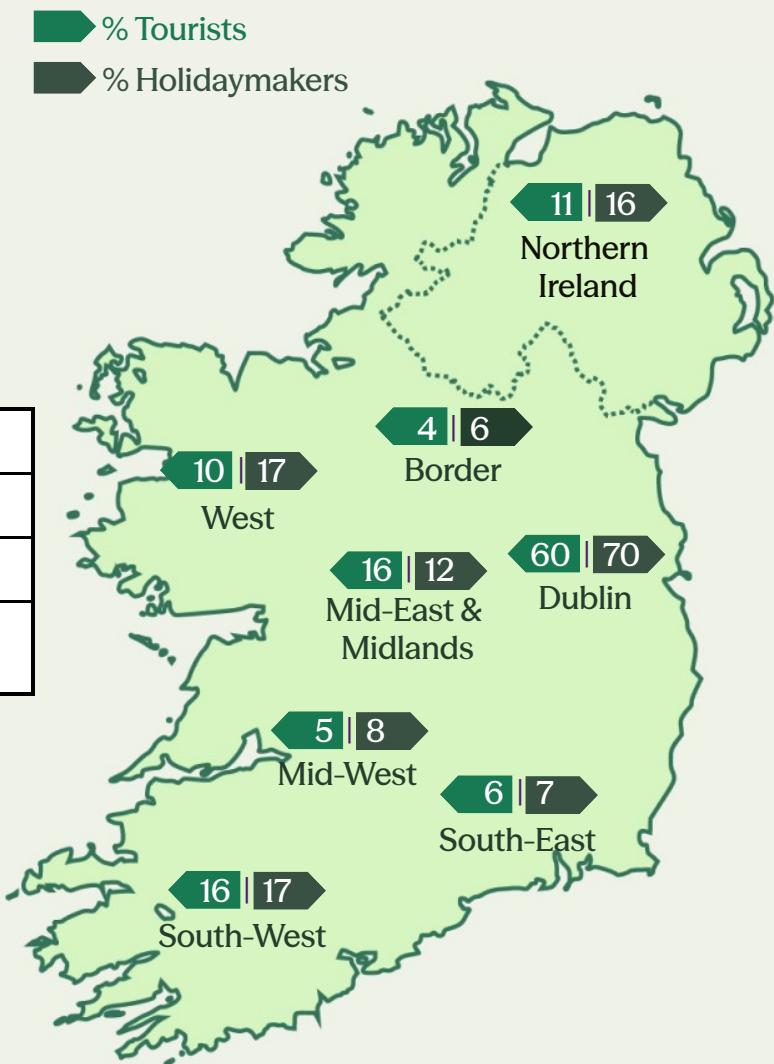
INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin and the South-West feature in the top three destinations for both Dutch tourists and holidaymakers. While the Mid-East & Midlands rank highly among tourists, holidaymakers show a stronger preference for the West.

Almost 11,000 Dutch tourists and 8,000 holidaymakers overnighted on both sides of the border.

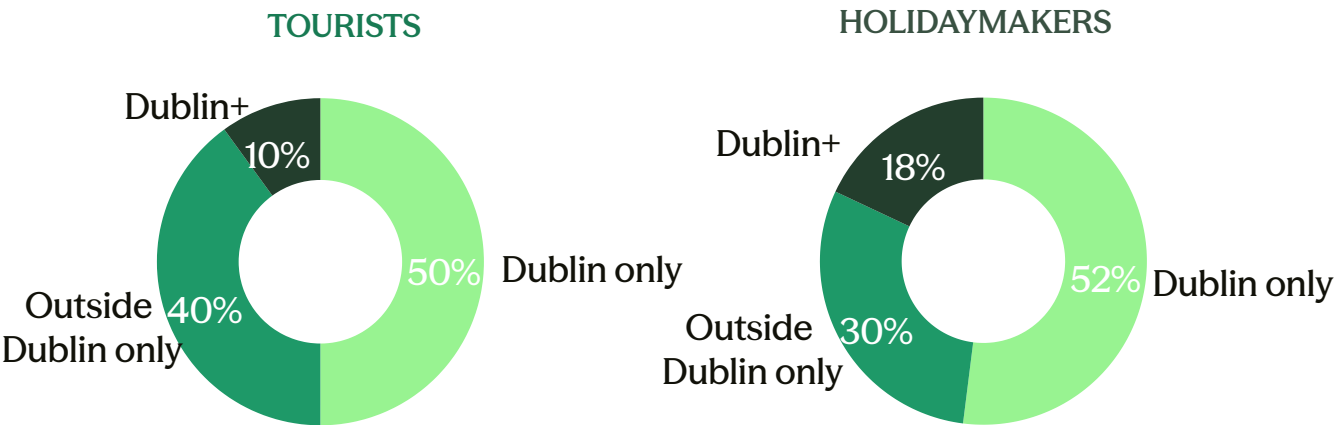
Top	Tourists	Holidaymakers
1	Dublin	Dublin
2	South-West	West
3	Mid-East & Midlands	South-West



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

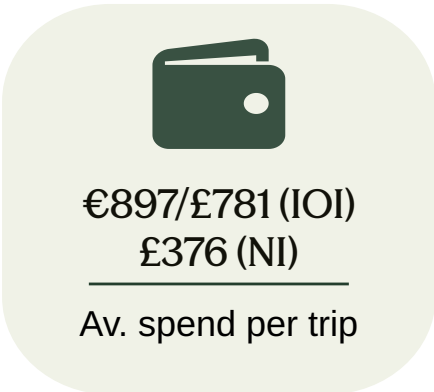
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of Dutch tourists (60%) and holidaymakers (70%).



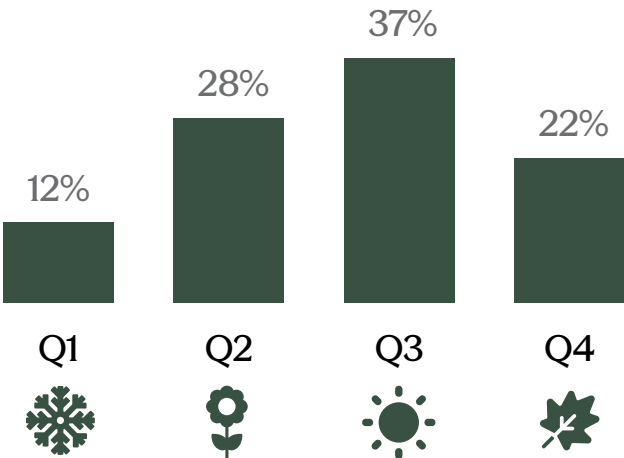
INBOUND HOLIDAYMAKERS

The Netherlands was the island of Ireland's eighth-largest source of holiday spend, trips and nights in 2025, generating €74/£64 million in holiday revenue from 83,000 trips.



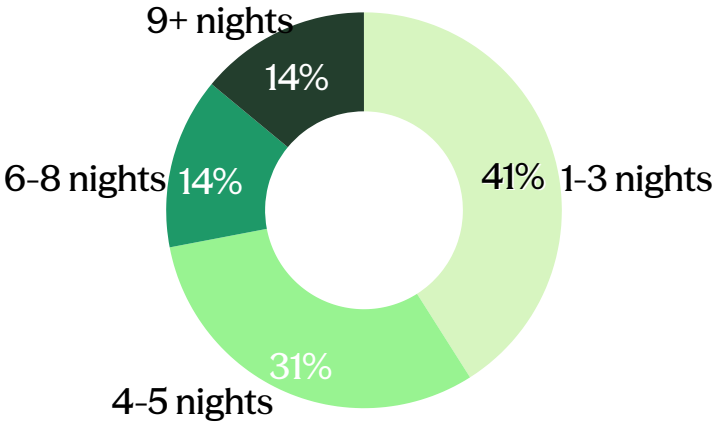
WHEN DID OUR HOLIDAYMAKERS VISIT?

Two-thirds (65%) of Dutch holidaymakers visited during Q2 and Q3 (April–September).



HOW LONG DID OUR HOLIDAYMAKERS STAY?

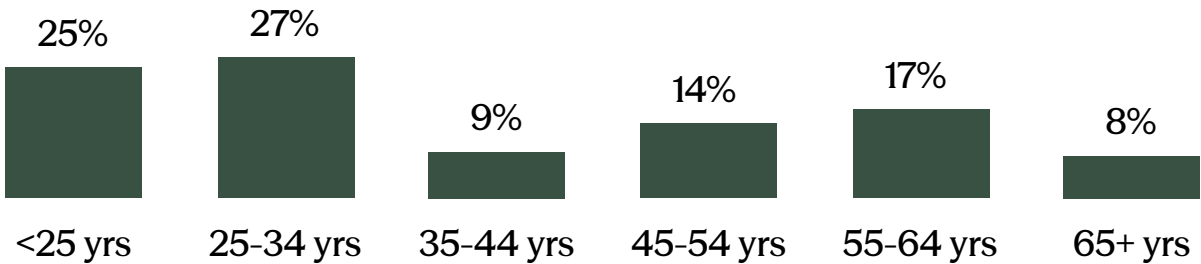
Seven in ten Dutch holidaymakers stayed on the island of Ireland for a short break of up to 5 nights.



INBOUND HOLIDAYMAKERS

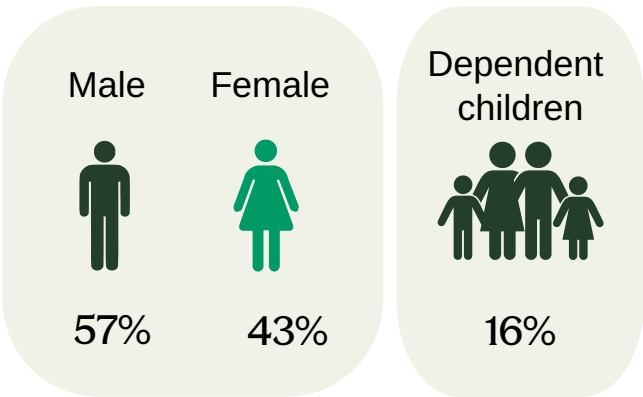
WHAT AGE WERE OUR HOLIDAYMAKERS?

Just over half of Dutch holidaymakers (52%) were aged under 35, but there was still a good spread across all age categories.



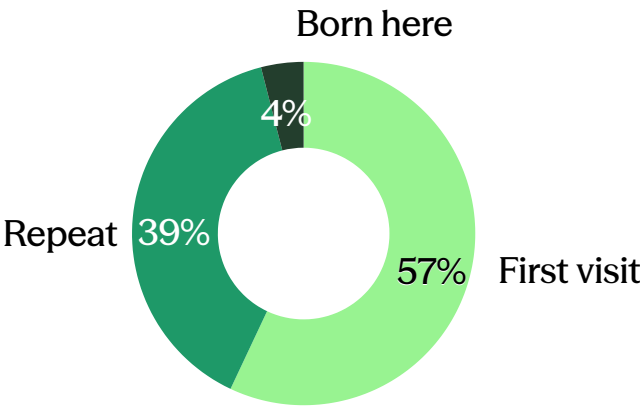
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN*

Dutch holidaymakers were broadly gender balanced with a slight skew towards males. One in six holidaymakers had dependent children in their household.



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

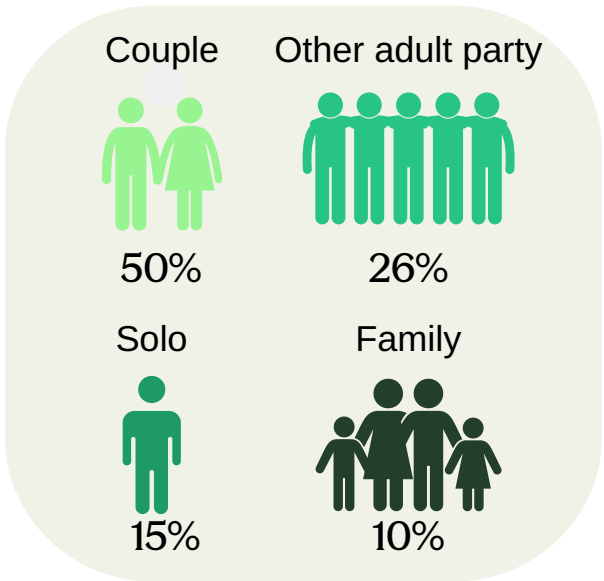
For over half (57%) of Dutch holidaymakers, 2025 marked their first visit to the island of Ireland.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Half (50%) of Dutch holidaymakers visited the island of Ireland with their partner/spouse.

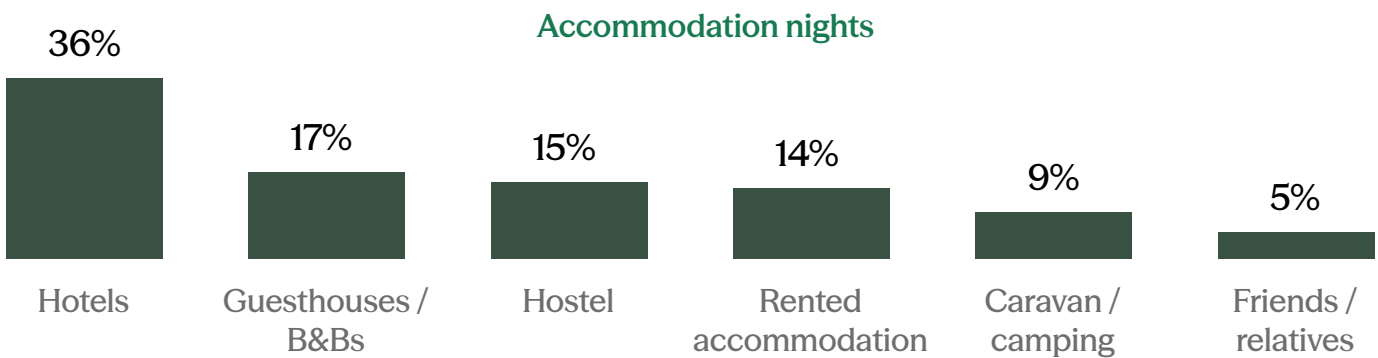
Over one-quarter (26%) travelled with another adult party.



INBOUND HOLIDAYMAKERS

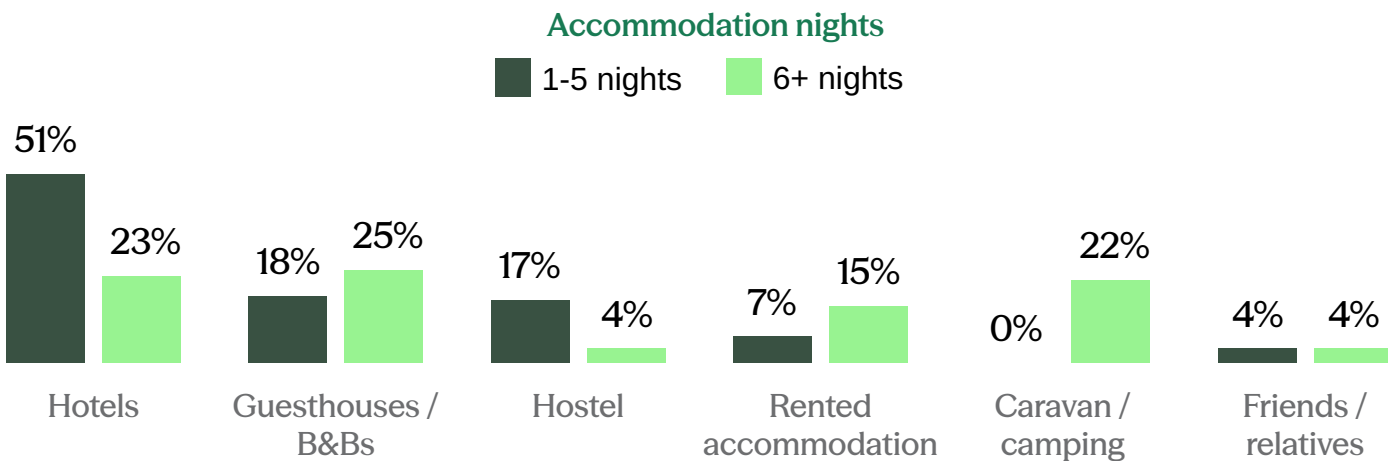
WHERE DID OUR HOLIDAYMAKERS STAY?

Hotels remained the preferred accommodation choice among Dutch holidaymakers, accounting for over one-third (36%) of nights stayed on the island of Ireland.



HOW DID ACCOMMODATION CHOICE VARY BY LENGTH OF STAY?*

Hotels were especially popular among Dutch holidaymakers on short breaks (1–5 nights), while guesthouses/B&Bs, camping and rentals were particularly popular among longer-staying holidaymakers.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?*

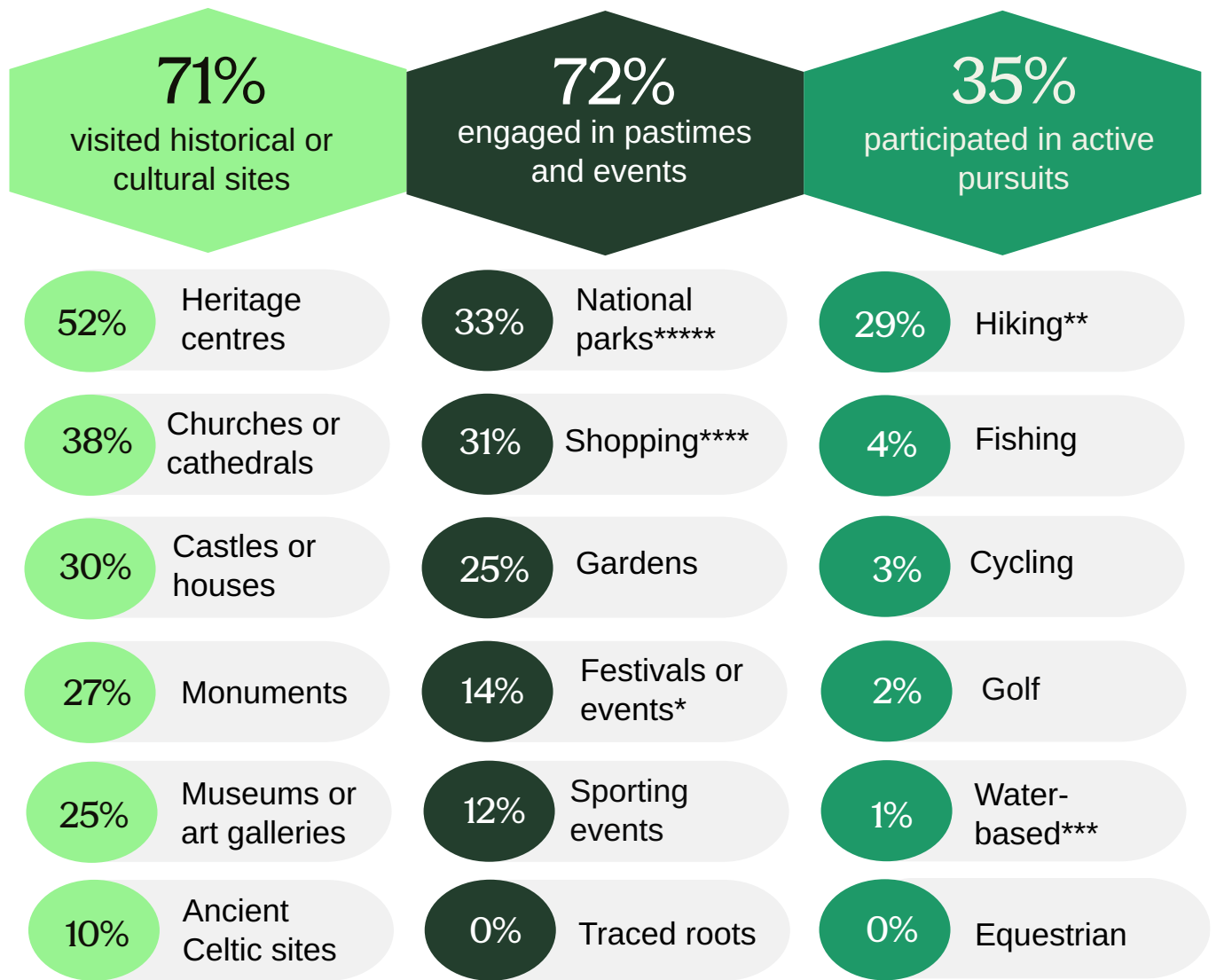
Independent travel dominated the market in 2025, with almost all Dutch holidaymakers (97%) organising their trip independently. One in four used a car.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

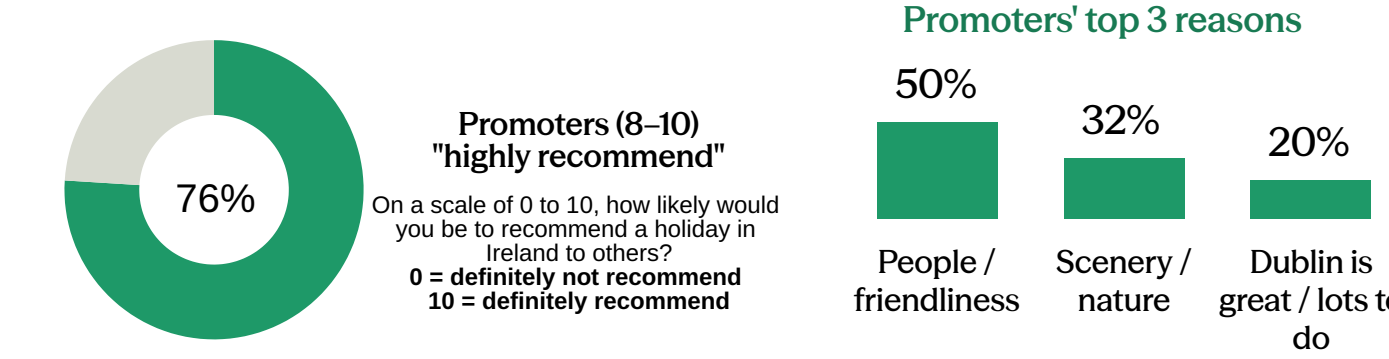
Dutch holidaymakers are highly engaged visitors, combining cultural sightseeing with a wide range of recreational activities during their trip.



*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 (76%) of Dutch holidaymakers would highly recommend a holiday on the island of Ireland to friends and family. The main reasons given are the friendly people (50%), our scenery and nature (32%) and lots to do (20%).



OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from the Netherlands 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.

Recommendations from friends and family were the most influential source of travel inspiration

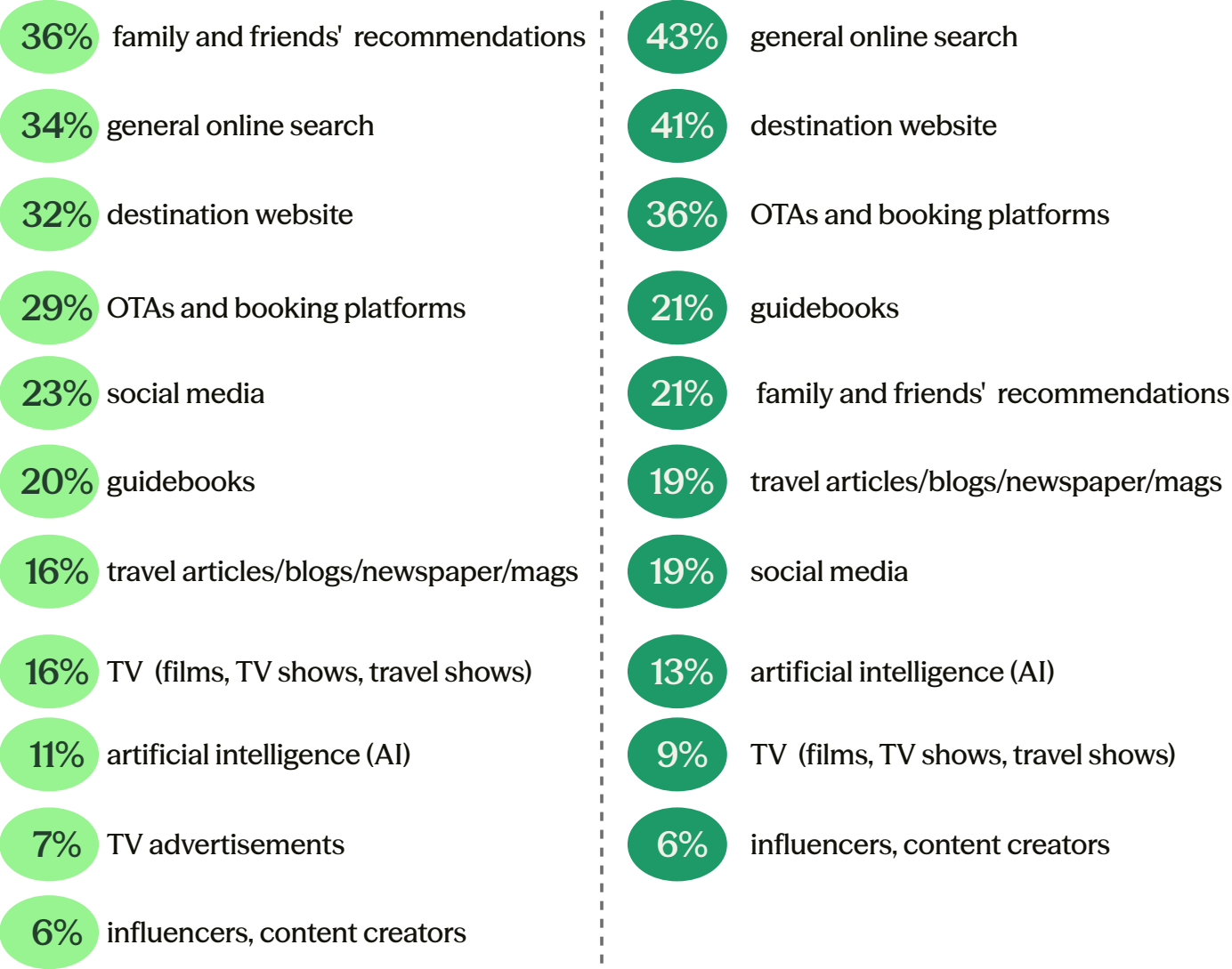
General online search was the most important tool used when planning their trip

DREAMING



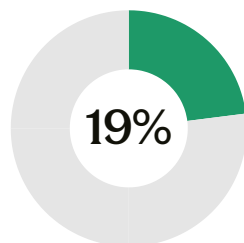
RESEARCH AND PLANNING

BASED ON RESPONDENTS' TOP 3 SOURCES

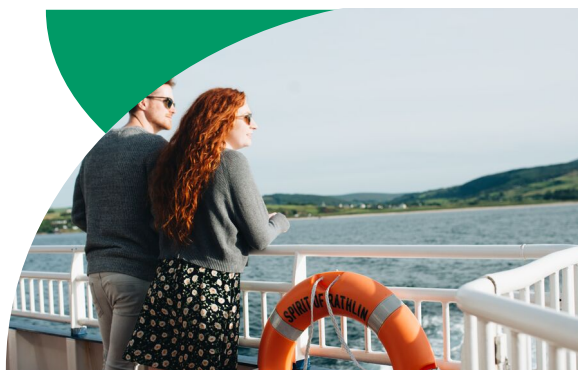
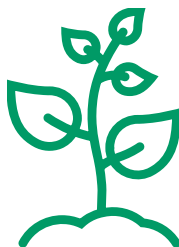


ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



of Dutch
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 stimulate my 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



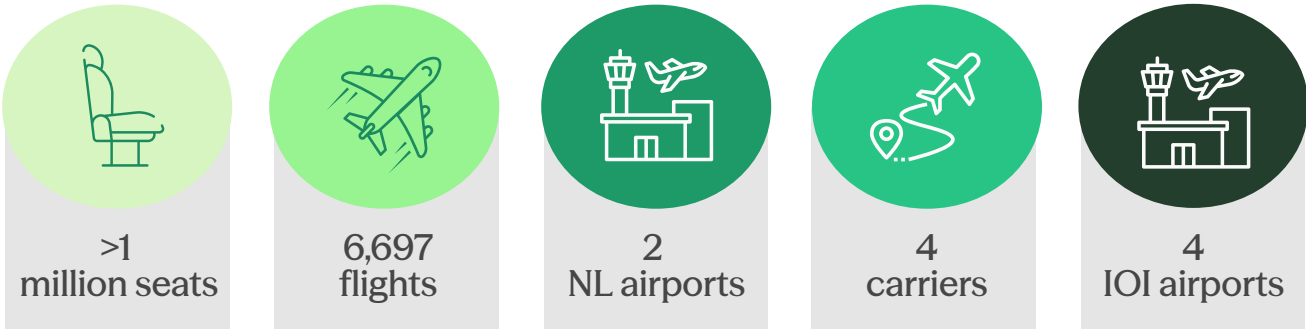
To enjoy the beauty of the landscape

OUTBOUND TOURISTS

In 2025, the Netherlands was the world’s eleventh-largest outbound market, with 88% of its outbound trips going to other parts of Europe.

ACCESS BY AIR

More than one million direct one-way seats were available between the Netherlands and the island of Ireland in 2025, delivered across almost 6,700 flights.



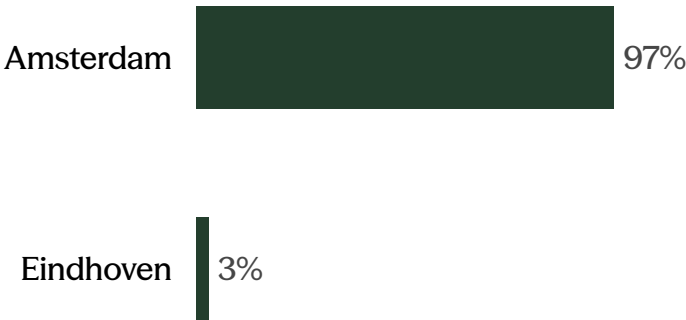
WHERE CAN OUR TOURISTS FLY FROM?

The majority (97%) of seats in 2025 came from Amsterdam.

WHO CAN OUR TOURISTS FLY WITH?

Four carriers operated between the Netherlands and the island of Ireland. In 2025, KLM, Ryanair and Aer Lingus were responsible for delivering the vast majority (96%) of seats to the island of Ireland.

SHARE OF SEATS BY AIRPORT



SHARE OF SEATS BY CARRIER

