

SWITZERLAND MARKET PROFILE 2024

Table of Contents

INBOUND TOURISTS	3
WHERE DID OUR TOURISTS VISIT?.....	3
WHEN DID OUR TOURISTS VISIT?	3
WHAT WERE OUR TOURISTS' REASONS FOR VISITING?	4
HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?	4
HOW DID OUR TOURISTS SPEND THEIR MONEY?.....	4
HOW LONG DID OUR TOURISTS STAY?.....	5
INBOUND TOURISTS AND HOLIDAYMAKERS.....	5
WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?.....	5
WHERE 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?	8
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN	8
HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?	8
WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?.....	9
HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?	9
WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?	10
LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS.....	10
Promoters - Top 3 reasons	10
Outbound holidaymakers	11
Sources of inspiration, research and planning	11
ENRICHMENT EXPLORERS	12
OUR TARGET SEGMENT	12
WHO ARE THE ENRICHMENT EXPLORERS AS PEOPLE?	12
WHAT DO THEY LOOK FOR ON A HOLIDAY?	12
THEIR TOP 10 HOLIDAY NEEDS.....	12

OUTBOUND HOLIDAYMAKERS.....	13
ACCESS BY AIR	13
WHERE CAN OUR TOURISTS FLY FROM?.....	13
Share of seats by airport (top 10)	13
WHO CAN OUR TOURISTS FLY WITH?	13
Airline share of seats	13

SWITZERLAND MARKET PROFILE 2024

INBOUND TOURISTS

The island of Ireland welcomed around 95,000 Swiss tourists who spent almost €106/£93 million and stayed 740,000 nights.

revenue €106/£93mn, global rank: #11

trips 95k, global rank: #12

nights 740k, global rank: #13

WHERE DID OUR TOURISTS VISIT?

Of the Swiss tourists that visited the island of Ireland in 2024, 6% overnighted both sides of the border.

ROI tourists 138 thousand

NI tourists 47 Thousand

Note: Visits to Ireland and Northern Ireland total more than the island figure due to tourists overnighting on **both sides of the border**.

WHEN DID OUR TOURISTS VISIT?

Three-fifths (60%) of Swiss tourists visited the island during Q2 and Q3 (April - September).

Tourist trips Qtr 1 19%

Tourist trips Qtr 2 28%

Tourist trips Qtr 3 32%

Tourist trips Qtr 4 20%

Source: CSO, NISRA

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Half (50%) of Swiss tourists visiting the island of Ireland came for a holiday, accounting for 58% of Swiss tourism revenue. Business and VFR tourists represented around one-fifth each of all trips. Tourists who came for "other reasons" though few in number (8% of trips) accounted for a quarter (23%) of nights.

PoV breakdown	Rev € million	Rev £ million	Rev share	Trips thousand	Trips share	Nights thousand	Nights share
Holiday	62	54	58%	48	50%	380	51%
VFR	11	9	10%	19	20%	123	17%
Business	18	16	17%	21	22%	65	9%
Other	16	14	15%	7	8%	171	23%

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

On average, Swiss tourists spent €1,116/£971 per trip or €144/£125 per night and stayed 7.8 nights on the island of Ireland.

On the island of Ireland:

- Average spend per trip €1,116 / £971
- Average spend per night €144 / £125
- Average stay 7.8 nights

In Northern Ireland:

- Average spend per trip £420 and per night £90
- Average stay 4.7 nights

HOW DID OUR TOURISTS SPEND THEIR MONEY?

Swiss tourists spent more on food and drink (35%) than any other item.

Food & drink	35%
Accommodation	30%
Shopping	16%
Transport	12%
Entertainment	6%
Misc	1%

HOW LONG DID OUR TOURISTS STAY?

Over a third (36%) of Swiss tourists stayed 6+ nights on the island of Ireland.

Length of stay

1-3 nights	32%
4-5 nights	32%
6-8 nights	18%
9+ nights	18%

INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin, the West, and the South-West were the most popular regions for Swiss tourists and holidaymakers.

WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

% visited areas	Tourists Holidaymakers
Northern Ireland	10% of Tourists Holidaymakers 15%
Border	5% of Tourists Holidaymakers 6%
Dublin	56% of Tourists Holidaymakers 69%
Mid West	5% of Tourists Holidaymakers 10%
South East	7% of Tourists Holidaymakers 6%
South West	15% of Tourists Holidaymakers 29%
West	15% of Tourists Holidaymakers 39%
Mid-East & Midlands	9% of Tourists Holidaymakers 8%

Top 3 regions:	Tourists	Holidaymakers
1	Dublin	Dublin
2	West	West
3	South West	South West

Definitions of areas listed

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 Swiss holidaymakers (79%), whereas Swiss tourists most often visited either Dublin or the Regions, with few doing both.

	Tourists	Holidaymakers
Dublin only	49%	40%
Outside Dublin only	44%	31%
DUB+	7%	29%

INBOUND HOLIDAYMAKERS

On average, Swiss holidaymakers spent €1,296/£1,127 per trip or €163/£142 per night and stayed 7.9 nights on the island of Ireland.

- €62/£54m holiday revenue, global rank #11
- 48k holiday trips, global rank #11
- 380K holiday nights, global rank #11
- €1,296/£1,127 (IOI) Av. spend per trip
- €163/£142 (IOI) Av. spend per night
- Av. stay (nights) 7.9 on the island of Ireland.

WHEN DID OUR HOLIDAYMAKERS VISIT?

Q3 (July - September) was the most popular period for Swiss holidaymakers to visit the island of Ireland.

Holiday trips Qtr 1	15%
Holiday trips Qtr 2	28%
Holiday trips Qtr 3	41%
Holiday trips Qtr 4	16%

HOW LONG DID OUR HOLIDAYMAKERS STAY?

Almost half (47%) of Swiss holidaymakers stayed six or more nights on the island of Ireland.

Length of stay – holidays

1-3 nights	23%
4-5 nights	30%
6-8 nights	21%
9+ nights	27%

WHAT AGE WERE OUR HOLIDAYMAKERS?

Almost one-thirds (31%) of Swiss holidaymakers were 25 - 34 years old.

Holiday age (party)

< 25 years	17%
25-34 years	31%
35-44 years	18%
45-54 years	14%
55-64 years	17%
65 or older	3%

HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

One in five (19%) Swiss holidaymakers had dependent children in the household.

Dependent Children 19%

Party composition - gender

Male 40%

Female 60%

HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

It was a first visit for three-fifths (63%) of Swiss holidaymakers.

First 63%

Repeat 37%

Born here 1%

WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Almost half (46%) of Swiss holidaymakers travelled with their spouse/partner. A fifth (22%) travelled on their own.

Travel party

Couple	46%
Solo	22%
Other adult party	18%
Family	13%

HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

The majority (91%) of Swiss holidaymakers travelled independently and two-fifths (43%) used a car while on the island of Ireland.

Independent travel	91%
Package	9%
Car used	43%
<i>Car hire</i>	37%
<i>Car brought</i>	4%
<i>Car borrowed/other</i>	2%

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

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

Any historical or cultural sites 91%

- Churches or Cathedrals 65%
- Historic Houses or Castles 63%
- Visitor/heritage centre 59%
- Museums or art galleries 57%
- Monuments 56%
- Ancient Celtic Sites 29%

Any pastimes & events 88%

- Visited national parks and forests 66%
- Shopping excluding food, drink & souvenirs 54%
- Visited gardens 53%
- Attended a festival or cultural event or concert 10%
- Attended an organised sporting event 2%
- Traced roots or genealogy 0%

Any active pursuits 47%

- Hiking / Cross Country Walking 43%
- Cycling 6%
- Water based activities (excluding fishing and swimming) 2%
- Equestrian pursuits 2%
- Fishing 1%
- Golf 0%

Source: Fáilte Ireland's Survey of Overseas Travellers

LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS

The majority (83%) of Swiss holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the scenery and nature (53%), the friendly people (51%) and that it's generally a great place to visit (15%).

Survey question wording: 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 are those who score 9 or 10 so "definitely recommend" 83%

Promoters - Top 3 reasons

- Scenery/Beauty of countryside/Nature 53%
- The People/Friendliness 51%
- Generally good/Great place to visit 15%

Outbound holidaymakers

Sources of inspiration, research and planning

Outbound holidaymakers 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
Family and friends' recommendations	44%
Online search	37%
Travel websites including company websites and booking platforms	28%
Destination websites	23%
Films, TV shows, travel shows	23%
Social media	23%
Travel articles, blogs	22%

Channel	Share of holidaymakers' research and planning
Online search	51%
Travel websites including company websites and booking platforms	40%
Destination websites	37%
Family and friends' recommendations	29%
Travel articles, blogs	24%
Guidebooks	23%
Social media	19%

ENRICHMENT EXPLORERS

Enrichment Explorers represent 24% of outbound holidaymakers among our key markets. Source: Overseas Holidaymaker Segmentation (n=13,000, Markets: GB, US, CA, DE, FR, IT, ES)

OUR TARGET SEGMENT

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.

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.

THEIR 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 HOLIDAYMAKERS

Switzerland was the world's 15th largest outbound market in 2024 and 90% of all outbound trips from Switzerland were to Europe.

ACCESS BY AIR

There were almost 352,000 direct one-way air seats available on over 2,100 flights from Switzerland to the island of Ireland in 2024. Three gateways from Switzerland to airports on the island of Ireland were serviced by 4 carriers.

Direct one-way seats	352,000
Direct flights	2,131
Market airports	3
Carriers	4
IOI airports	2

WHERE CAN OUR TOURISTS FLY FROM?

Zurich accounted for three-fifths (58%) of seats in 2024.

Share of seats by airport (top 10)

Zurich	58%
Geneva	35%
Basel	7%

WHO CAN OUR TOURISTS FLY WITH?

Four carriers operated between Switzerland and the island of Ireland. In 2024, Aer Lingus (45%) and SWISS (40%) were responsible for delivering the majority (85%) of seats to the island of Ireland.

Airline share of seats

Aer Lingus	45%
Swiss	40%
Ryanair	7%
Easyjet	7%