

NETHERLANDS

MARKET PROFILE 2023



INBOUND TOURISTS

The island of Ireland welcomed around 184,000 Dutch tourists who spent over €132/£115 million and stayed 1.1 million nights. The Netherlands was the island's seventh-largest source of overseas tourists and the ninth-largest source of overseas revenue.



WHERE DID OUR TOURISTS COME FROM?

Two-fifths (39%) of Dutch tourists came from Holland.



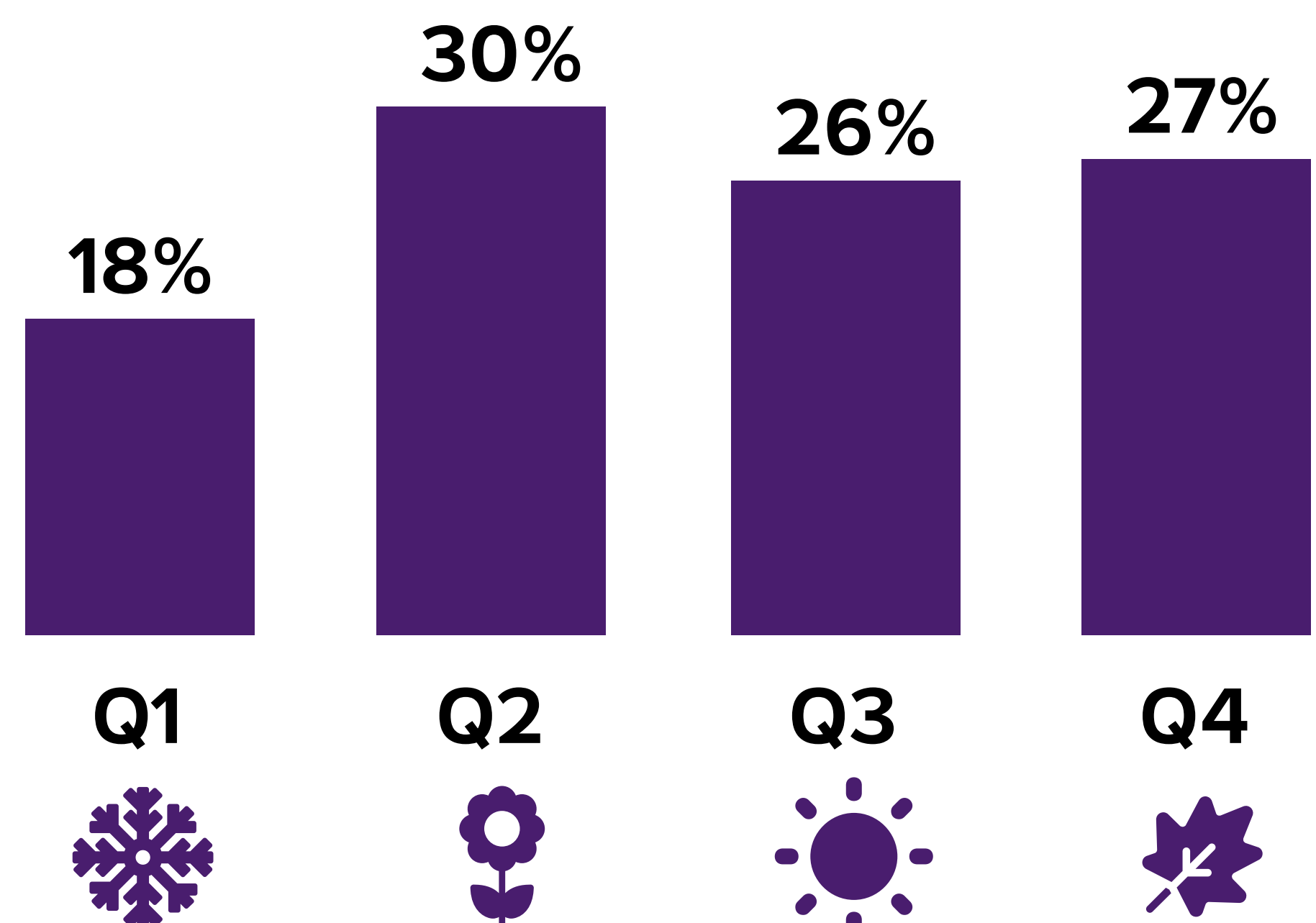
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?





Q2 (April - June) was the most popular time for Dutch tourists to visit the island.



INBOUND TOURISTS

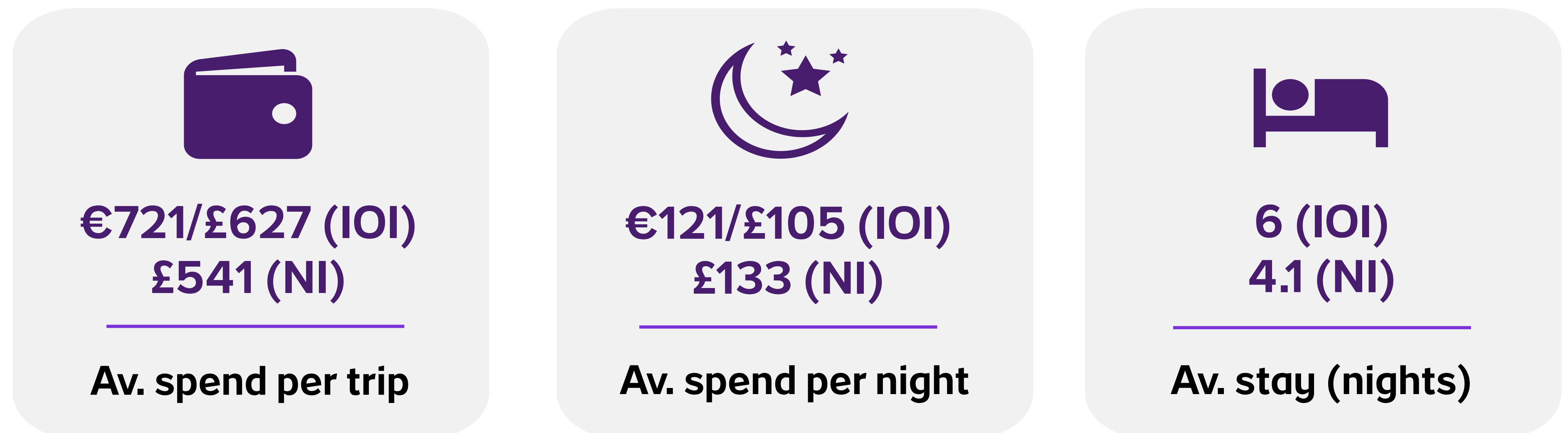
WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Over two-fifths (44%) of Dutch tourists visiting the island of Ireland came for a holiday, accounting for 58% of Dutch tourism revenue. Around a third (34%) were visiting friends and/or relatives (VFR), accounting for the second largest share (19%) of Dutch tourism revenue.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€77/£67m	58%	80k	44%	532k	48%
 VFR	€25/£22m	19%	63k	34%	392k	36%
 BUSINESS	€21/£19m	16%	34k	18%	106k	10%
 OTHER	€9/£8m	7%	7k	4%	67k	6%

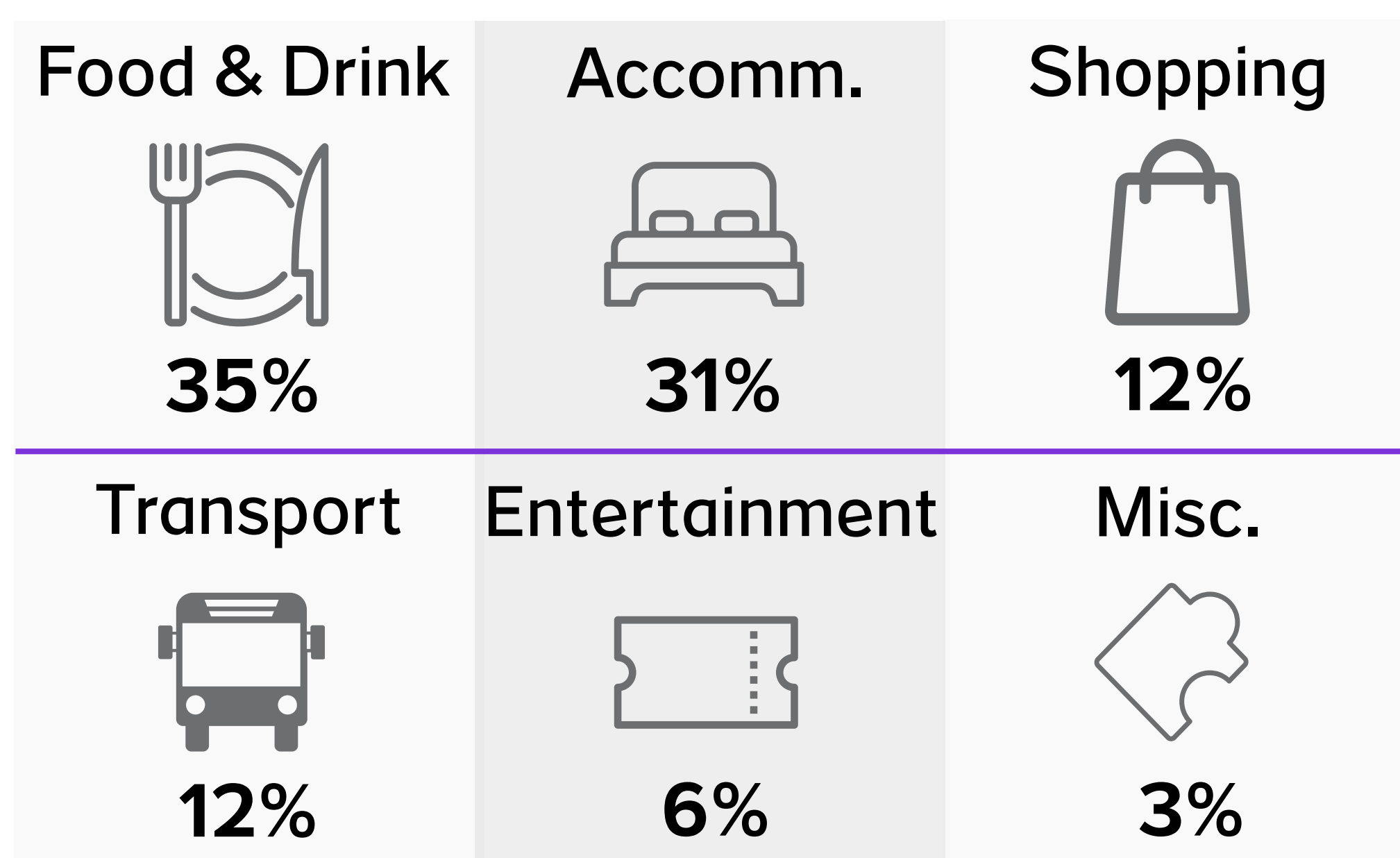
HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?

On average, Dutch tourists spent €721/£627 per trip or €121/£105 per night and stayed 6 nights on the island of Ireland.



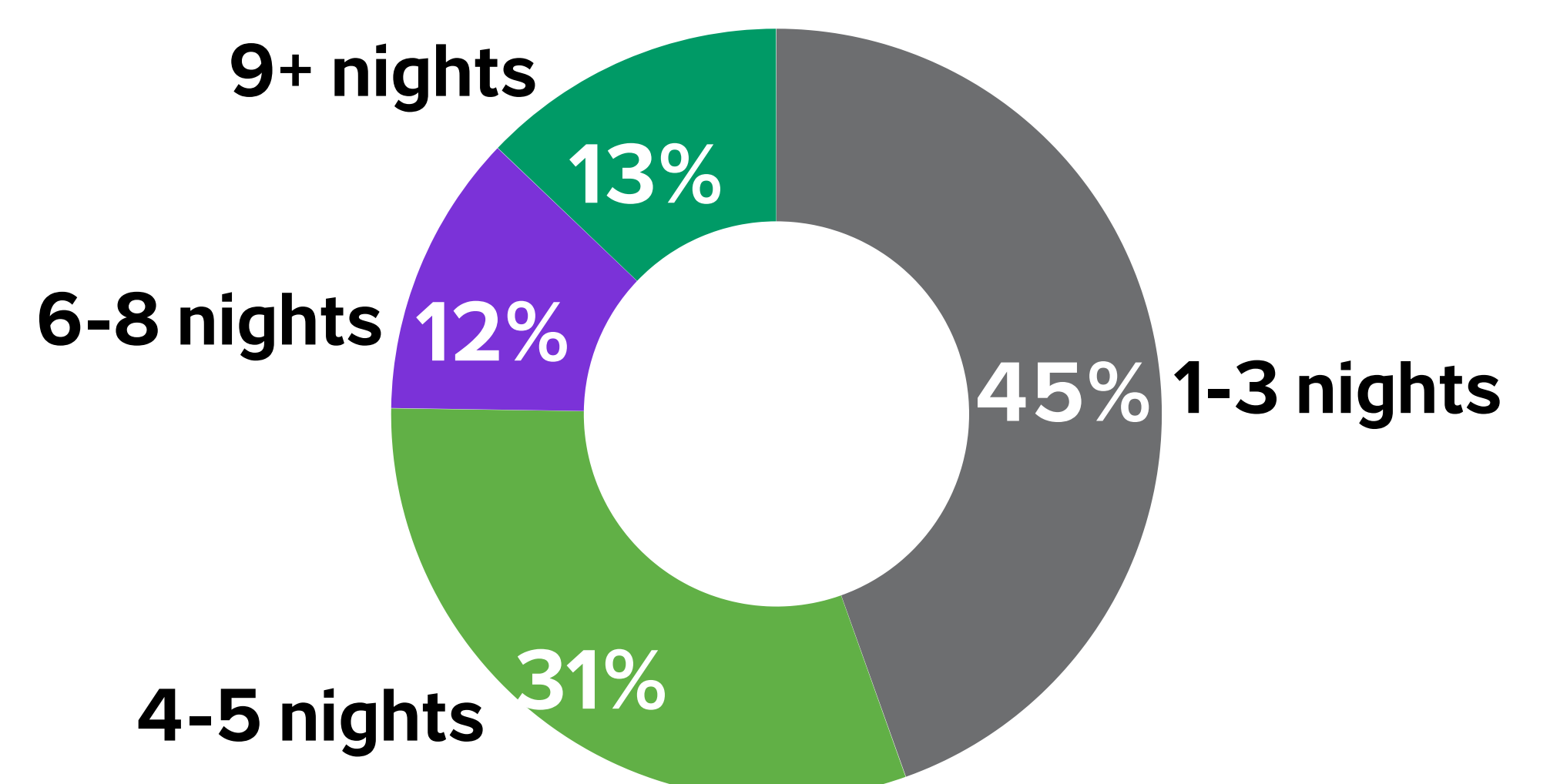
HOW DID OUR TOURISTS SPEND THEIR MONEY?

Almost two-fifths (35%) of Dutch tourists' revenue was spent on food and drink.



HOW LONG DID OUR TOURISTS STAY?

Three-quarters (75%) stayed up to five nights on the island of Ireland and almost half (45%) stayed up to three nights.



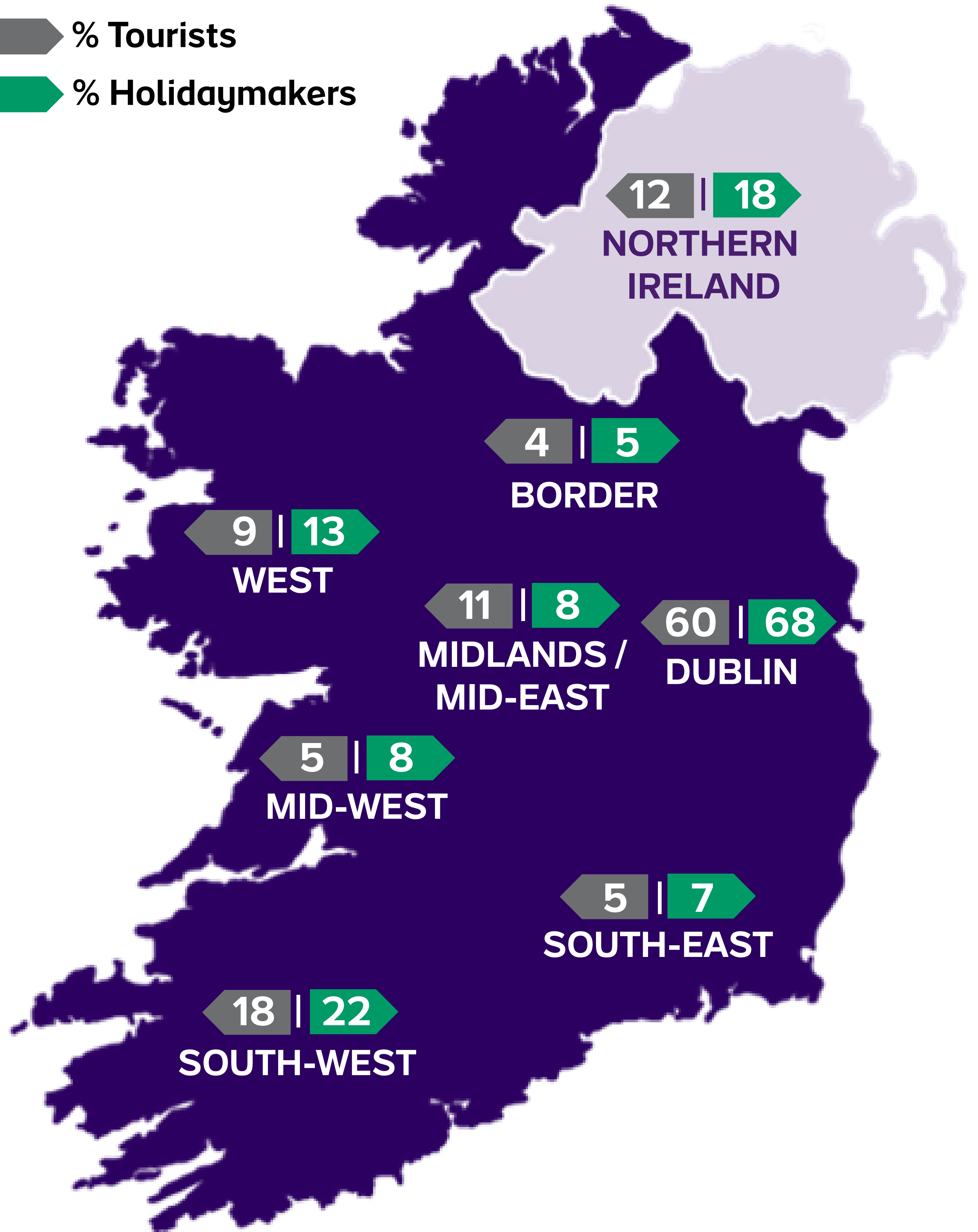
INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin, the South-West and Northern Ireland were the most popular regions for Dutch tourists and holidaymakers.

➤ % Tourists
➤ % Holidaymakers

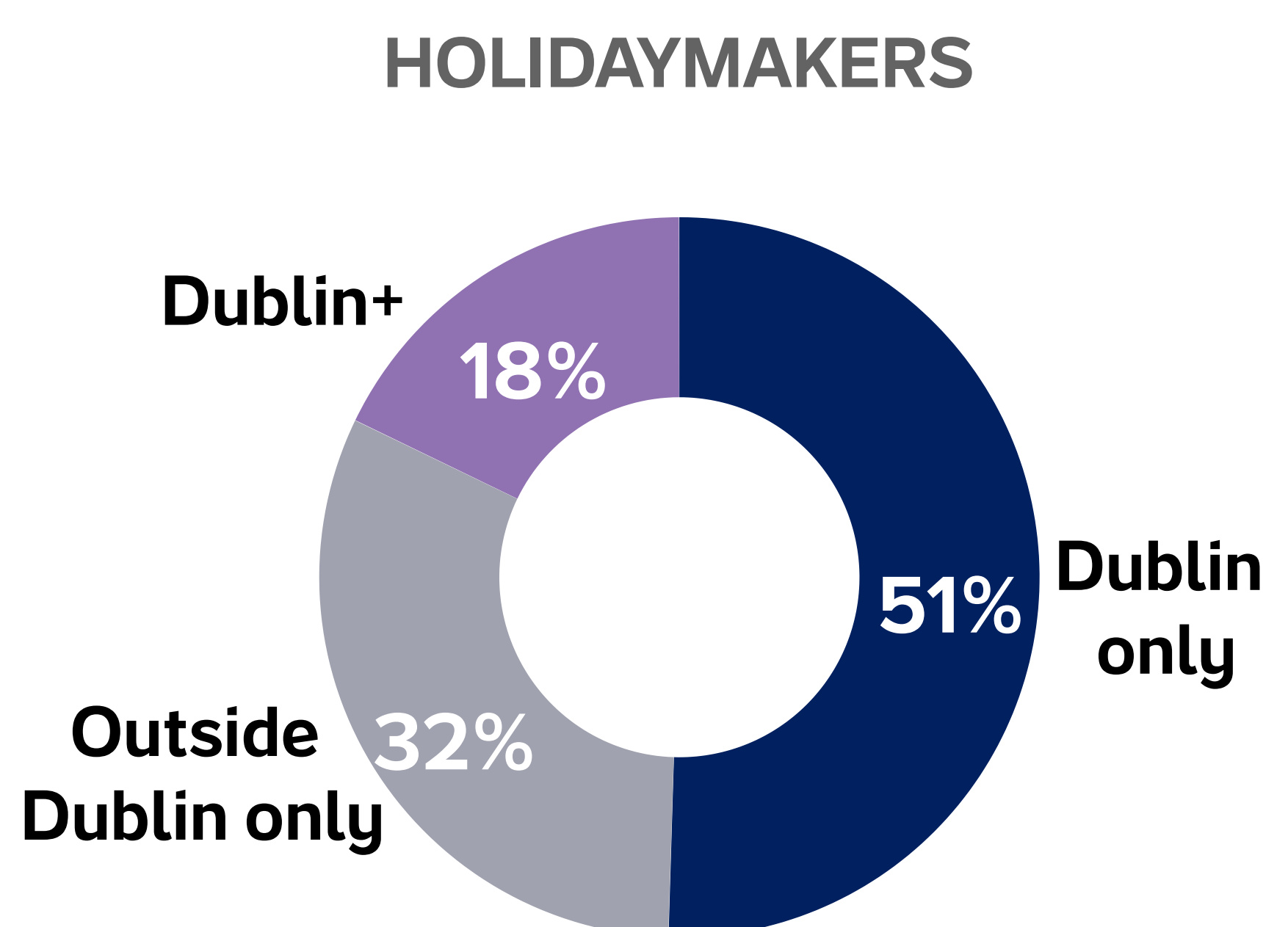
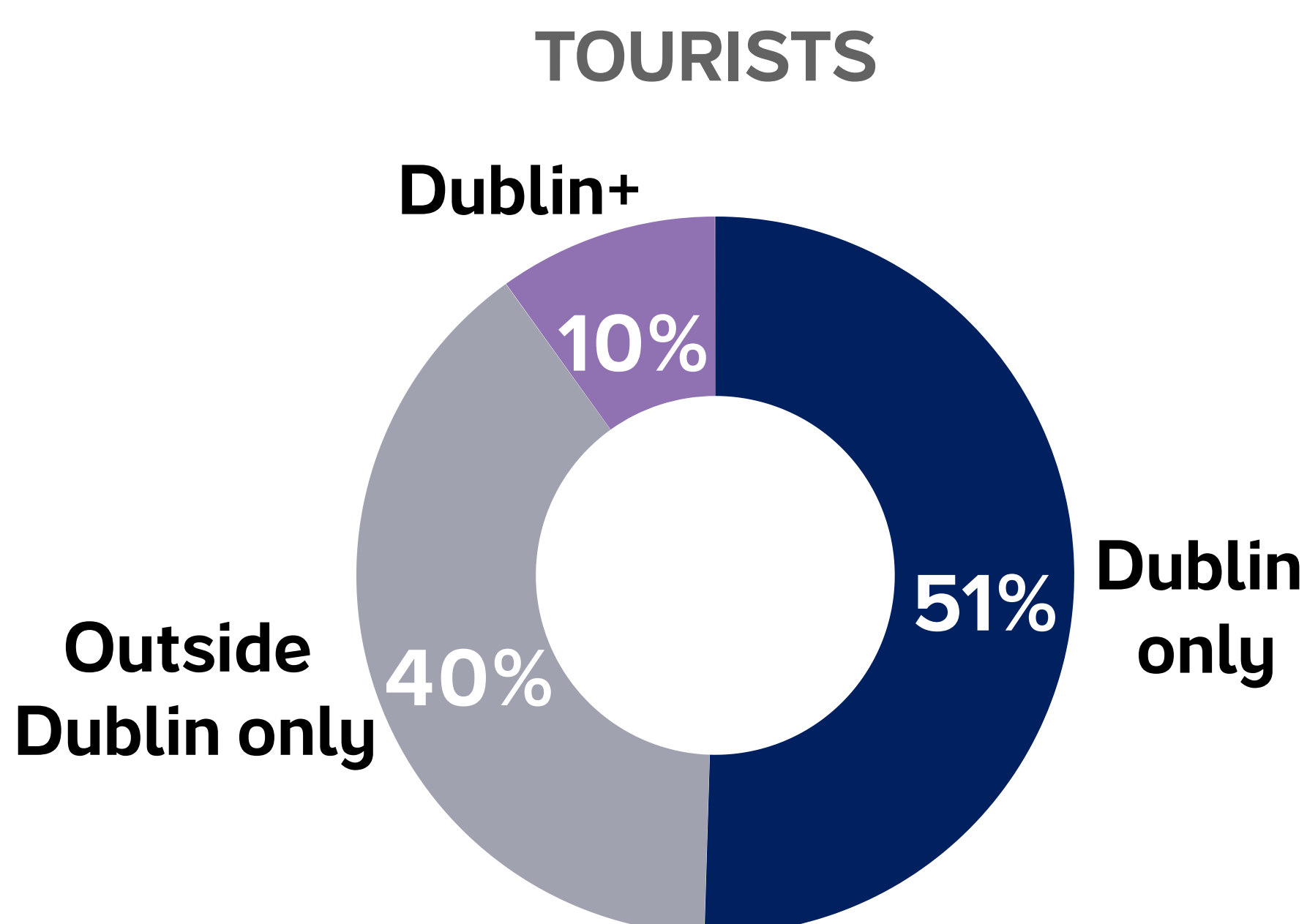
Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	South-West	South-West
#3	Northern Ireland	Northern Ireland



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

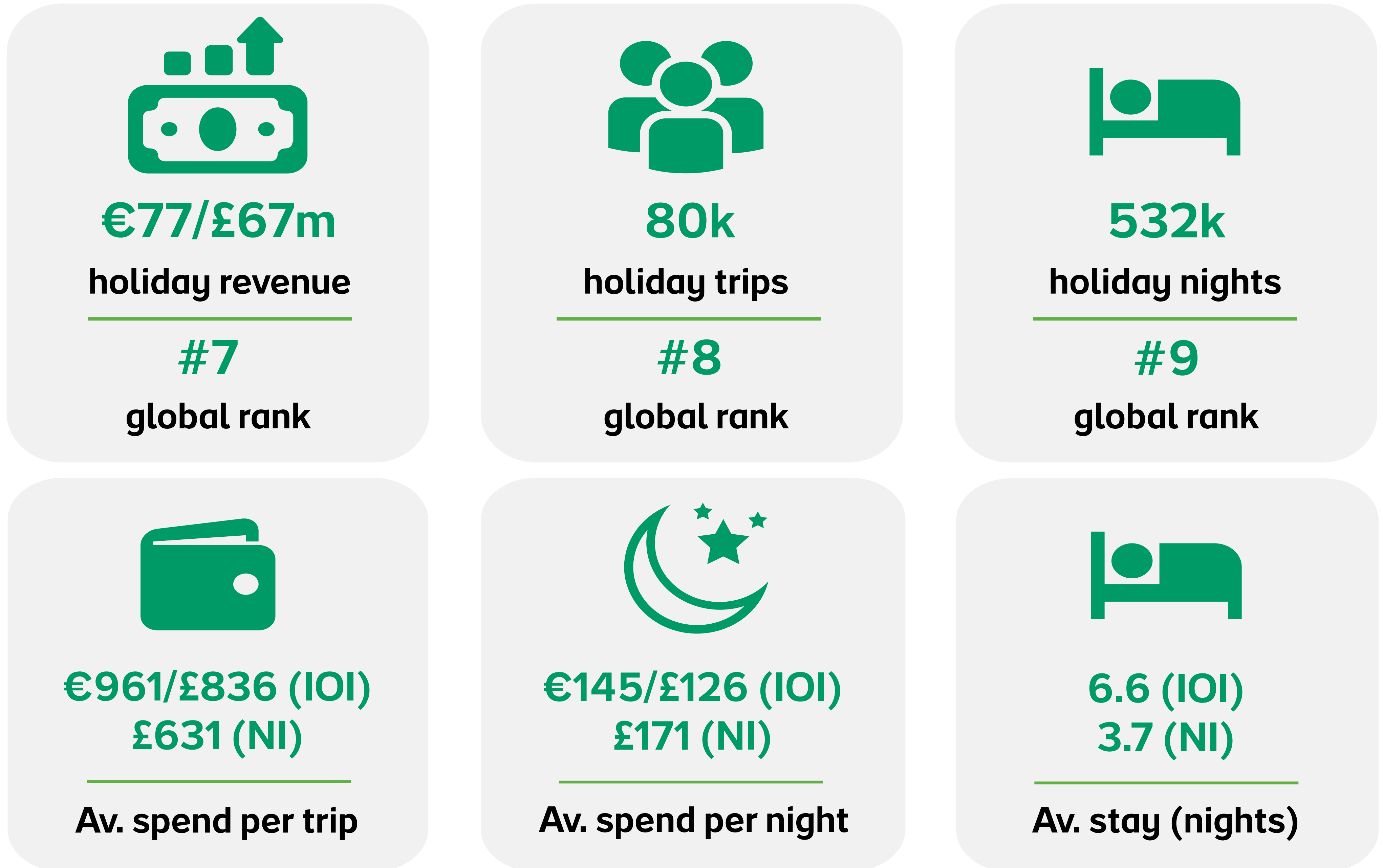
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of Dutch tourists (60%) and holidaymakers (68%).



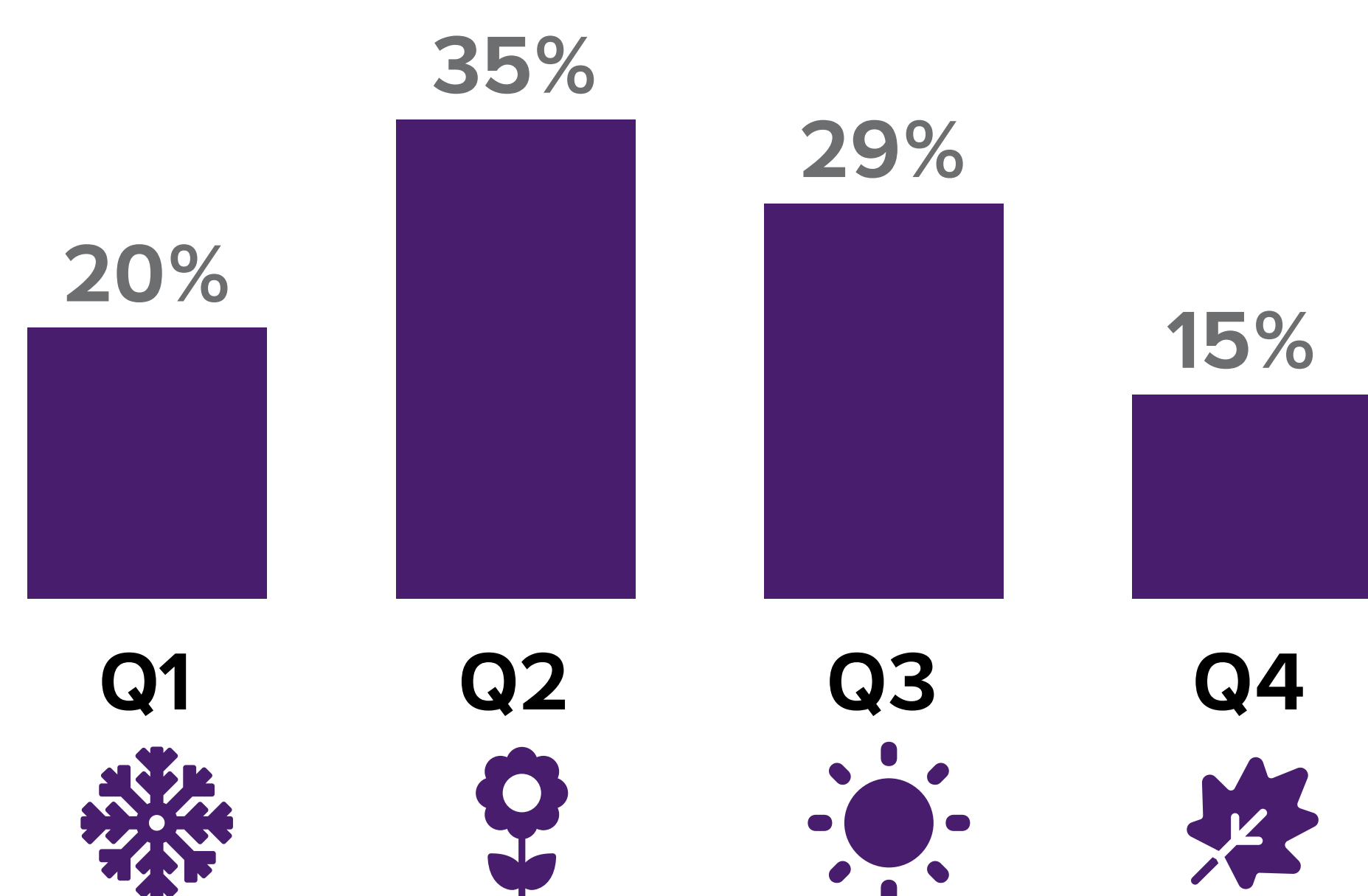
INBOUND HOLIDAYMAKERS

The Netherlands was the island of Ireland’s seventh-largest source of holiday revenue, the eighth-largest source of holidaymakers and the ninth-largest source of holiday nights. Dutch holidaymakers stayed for an average of 6.6 nights on the island of Ireland. Those visiting Northern Ireland stayed an average of 3.7 nights.



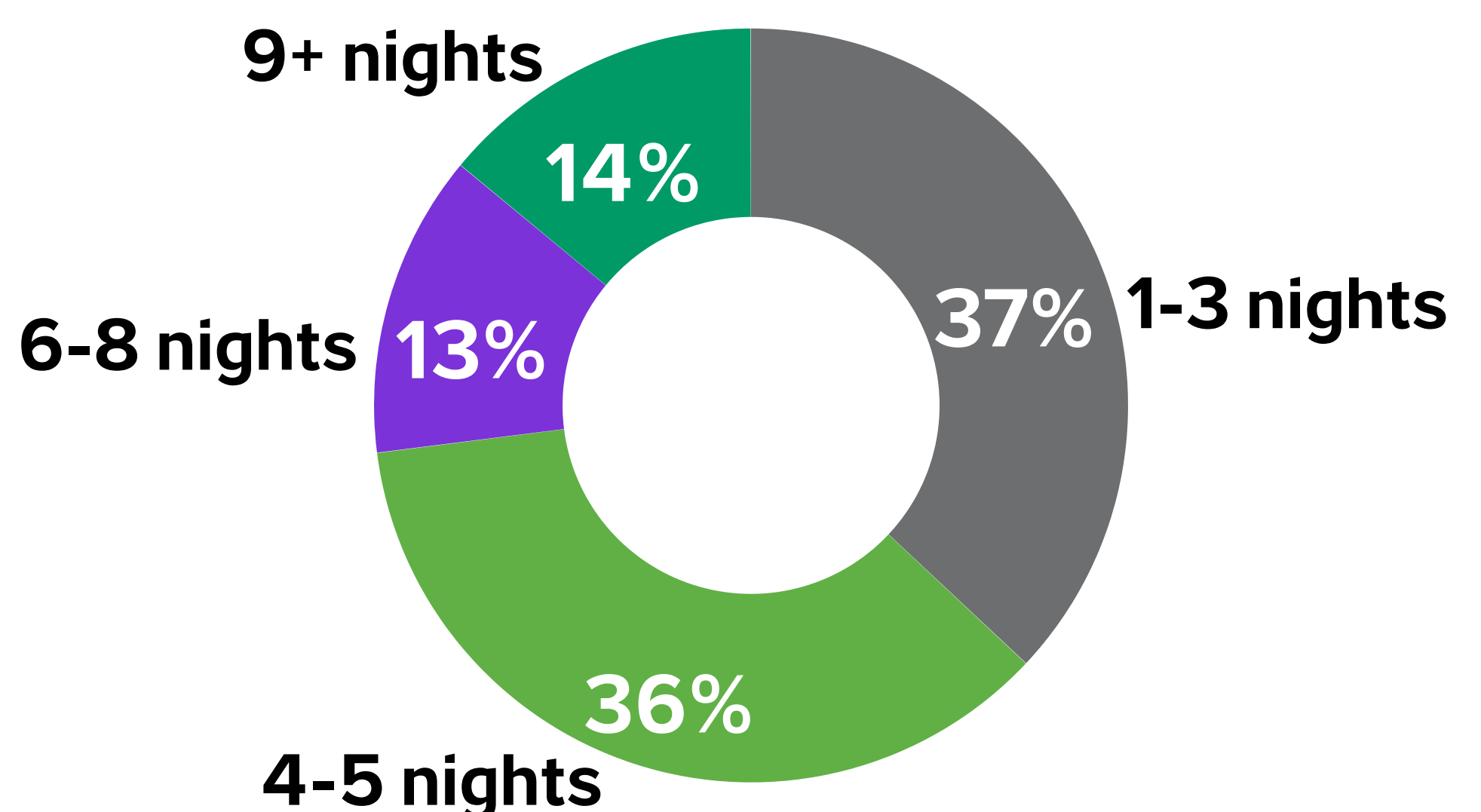
WHEN DID OUR HOLIDAYMAKERS VISIT?

Almost two-thirds (64%) visited the island of Ireland during Q2 and Q3 (April to September).



HOW LONG DID OUR HOLIDAYMAKERS STAY?

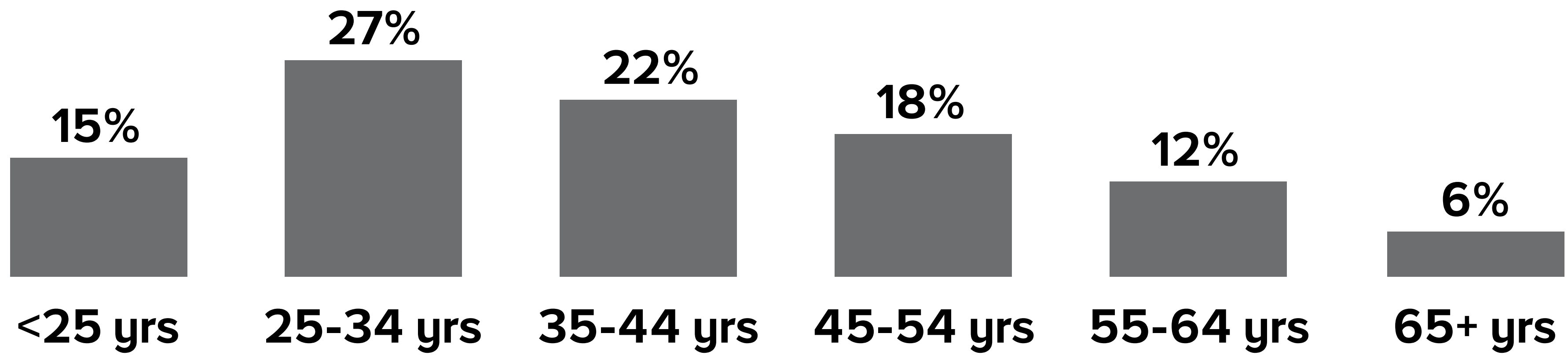
The majority (73%) of Dutch holidaymakers stayed up to five nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

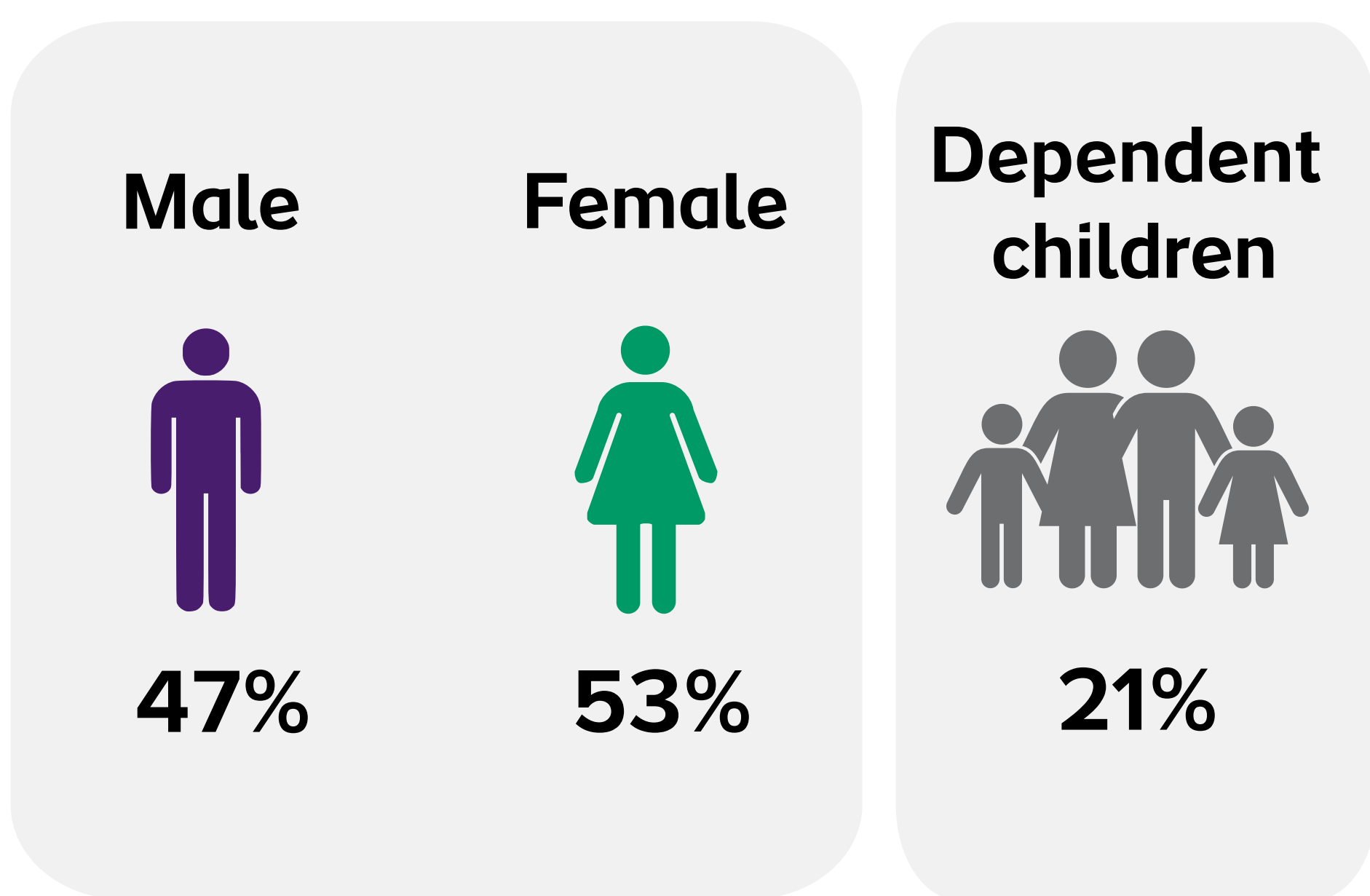
WHAT AGE WERE OUR HOLIDAYMAKERS?

Around half (49%) of Dutch holidaymakers were 25 - 44 years old.



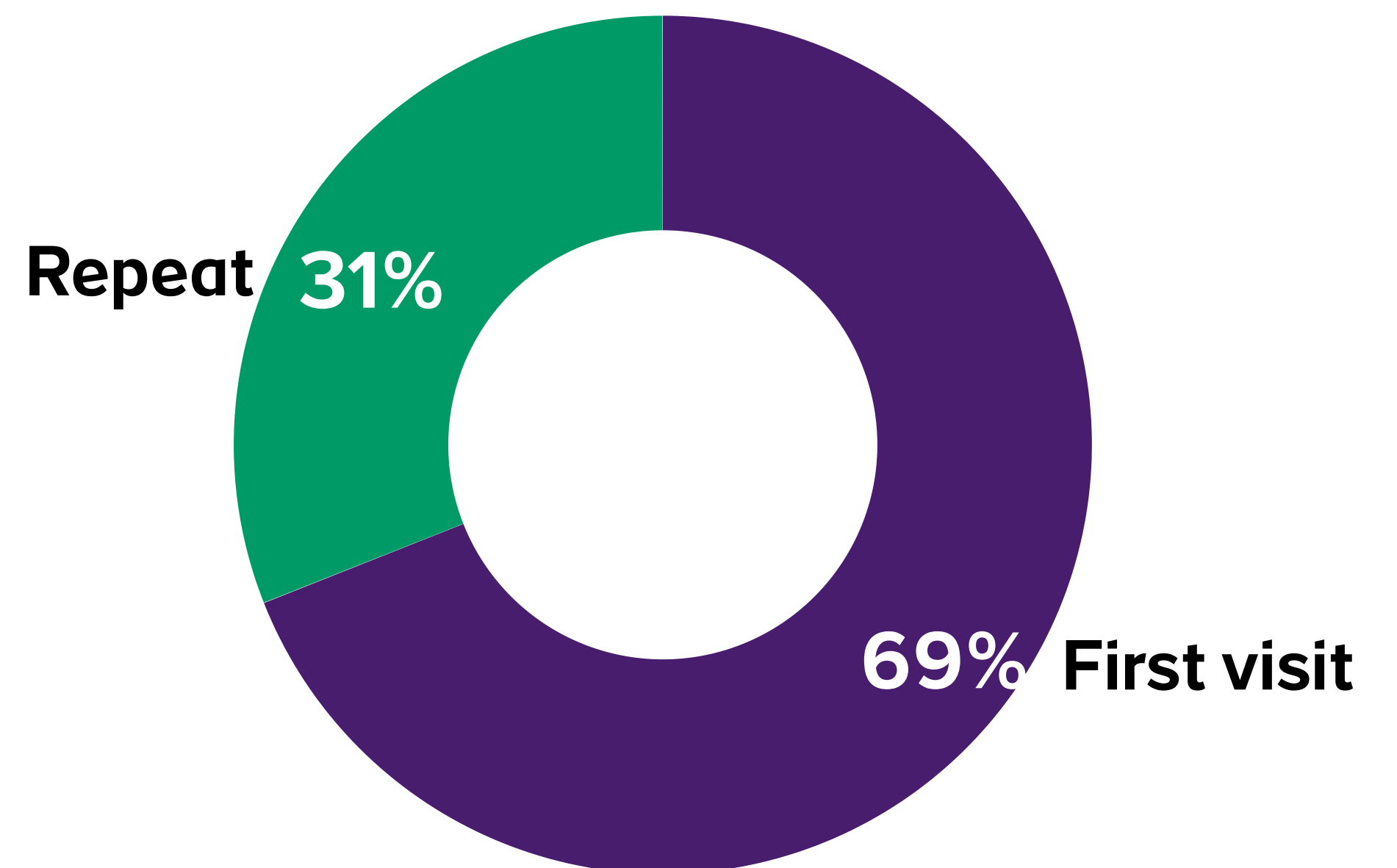
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

Around a fifth (21%) of Dutch holidaymakers had dependent children in the household (whether empty nesters or pre-children).



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

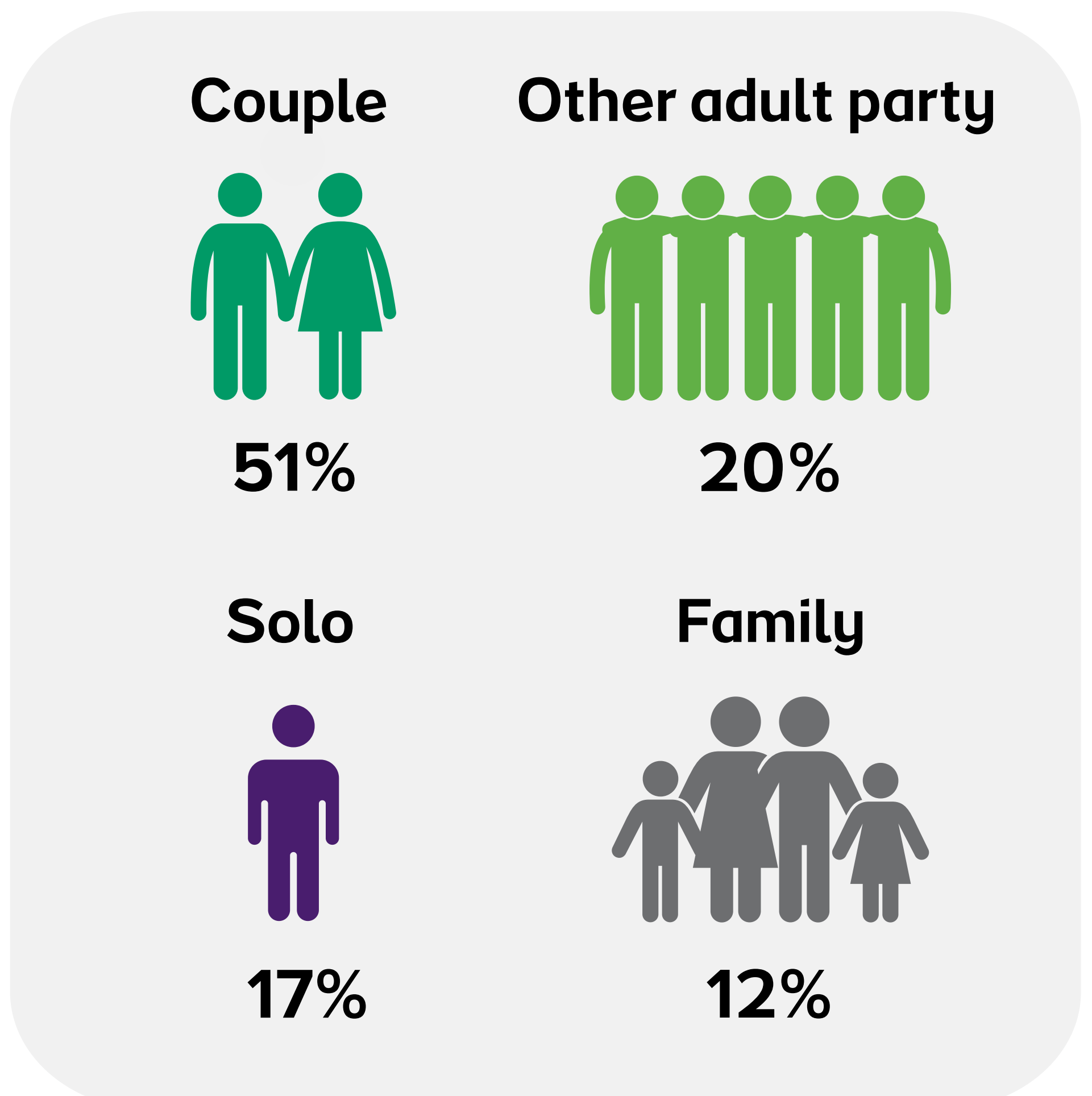
It was a first visit for around seven-in-ten (69%) of Dutch holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Half (51%) of Dutch holidaymakers travelled with their spouse/partner.

One-fifth (20%) visited with an "other adult party".

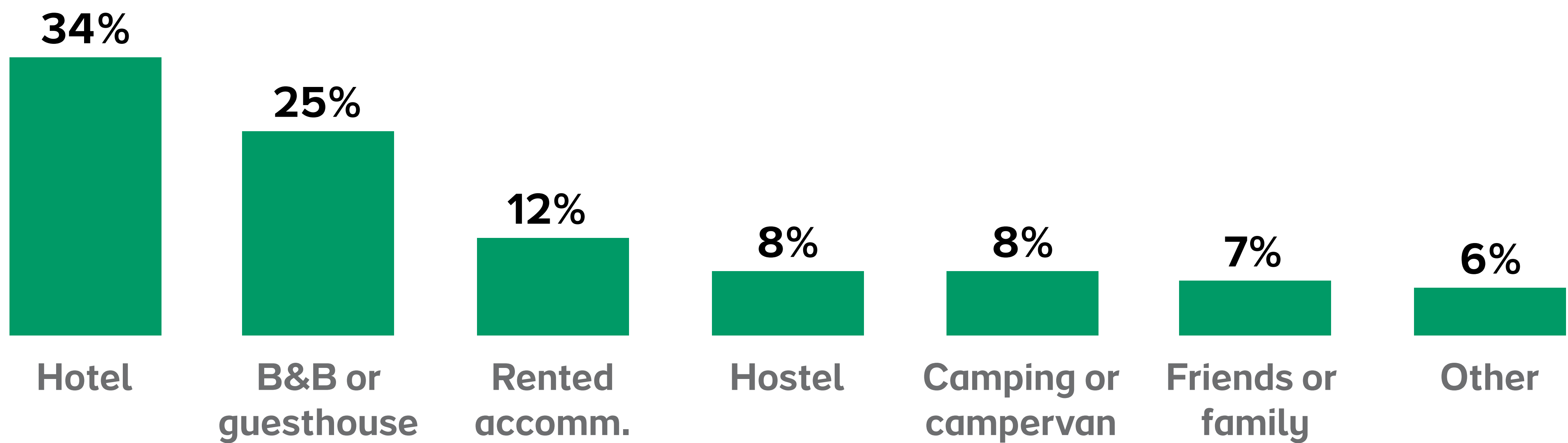


INBOUND HOLIDAYMAKERS

WHERE DID OUR HOLIDAYMAKERS STAY?

The majority (60%) of nights stayed by Dutch holidaymakers were in hotels (34%) and B&Bs or guesthouses (25%).

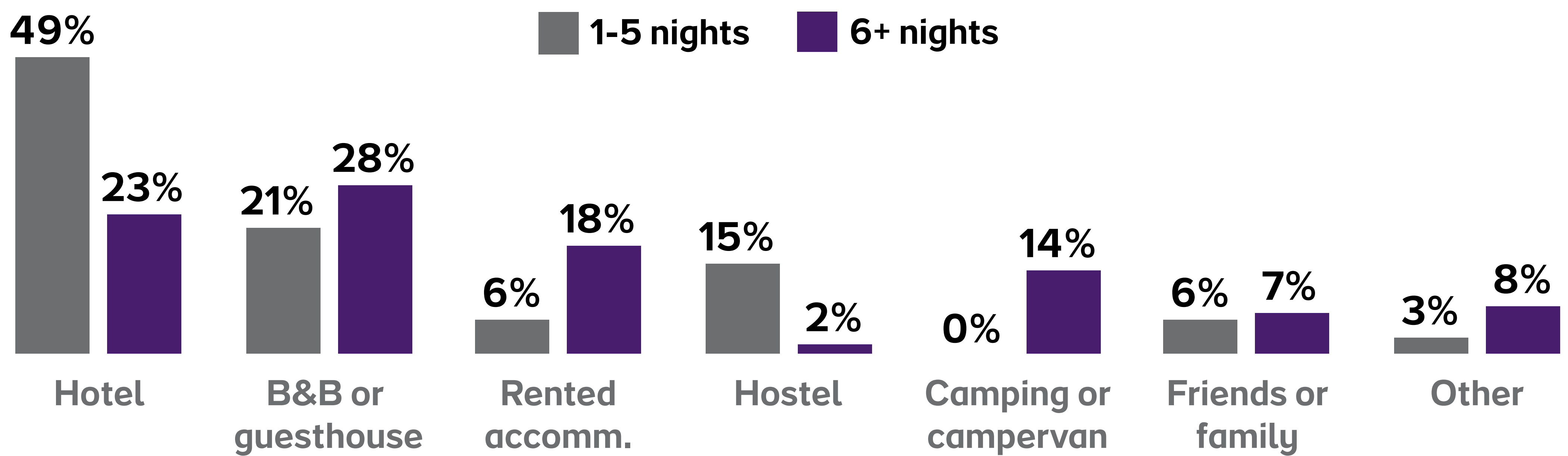
Accommodation nights



HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?

Hotels (49%) were more popular among Dutch holidaymakers on shorter breaks (1-5 nights), while B&Bs or guesthouses (28%), rented accommodation (18%) and camping or caravan (14%) were more popular with those staying 6+ nights.

Accommodation nights



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

The majority (95%) of Dutch holidaymakers travelled independently and around a third (34%) used a car while on the island of Ireland.

95%
Travelled independently

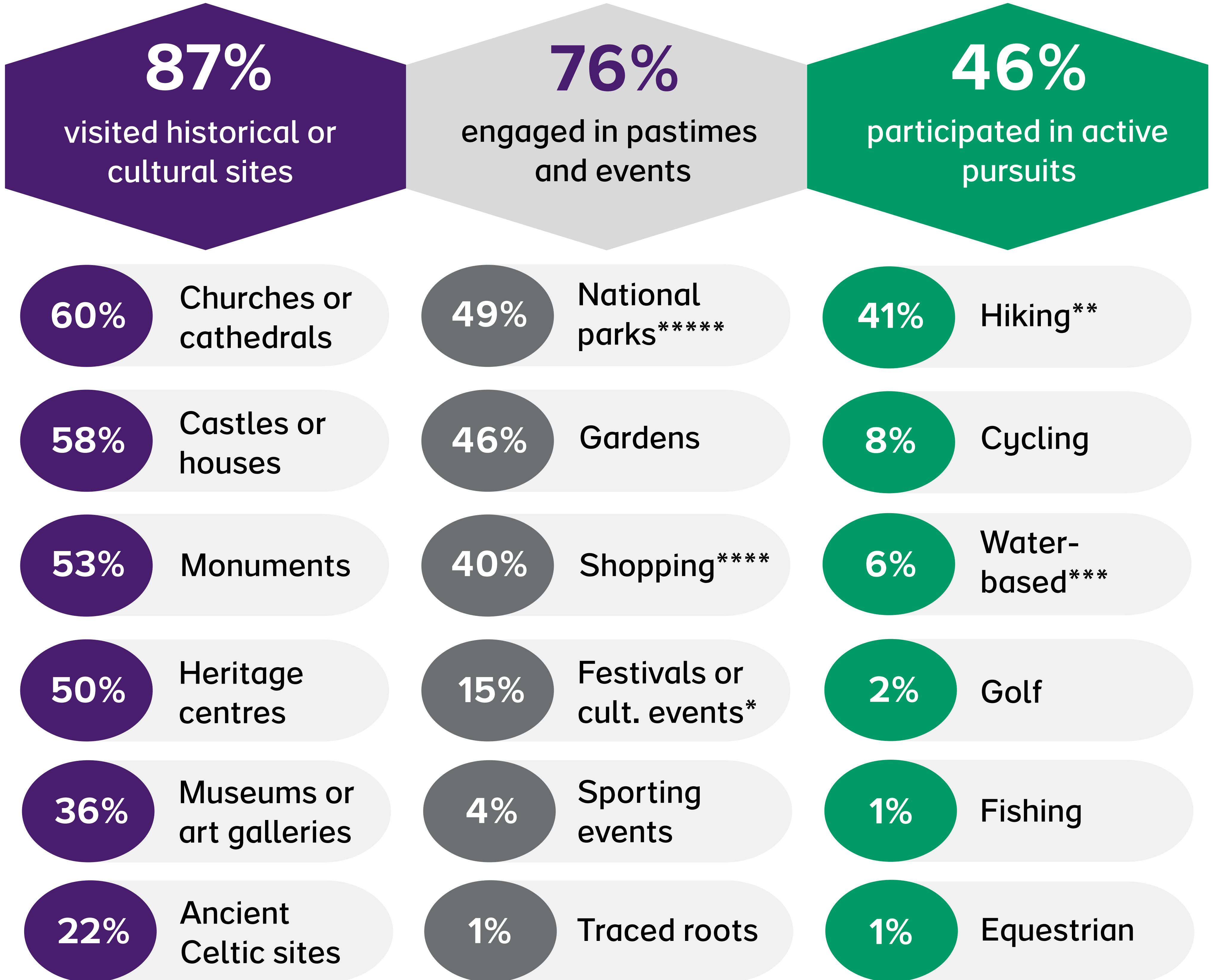
5%
Travelled as part of a package

34%
Used a car
21% Rented
10% Brought
3% Borrowed/Other

INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

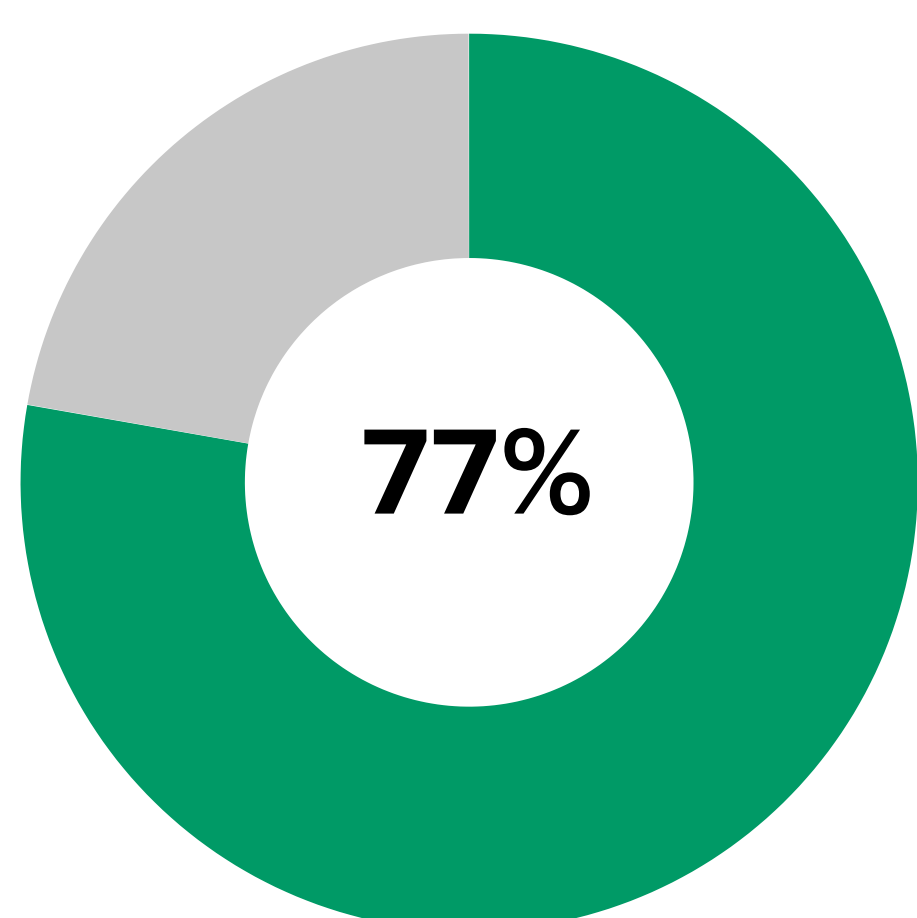
Dutch holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



*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

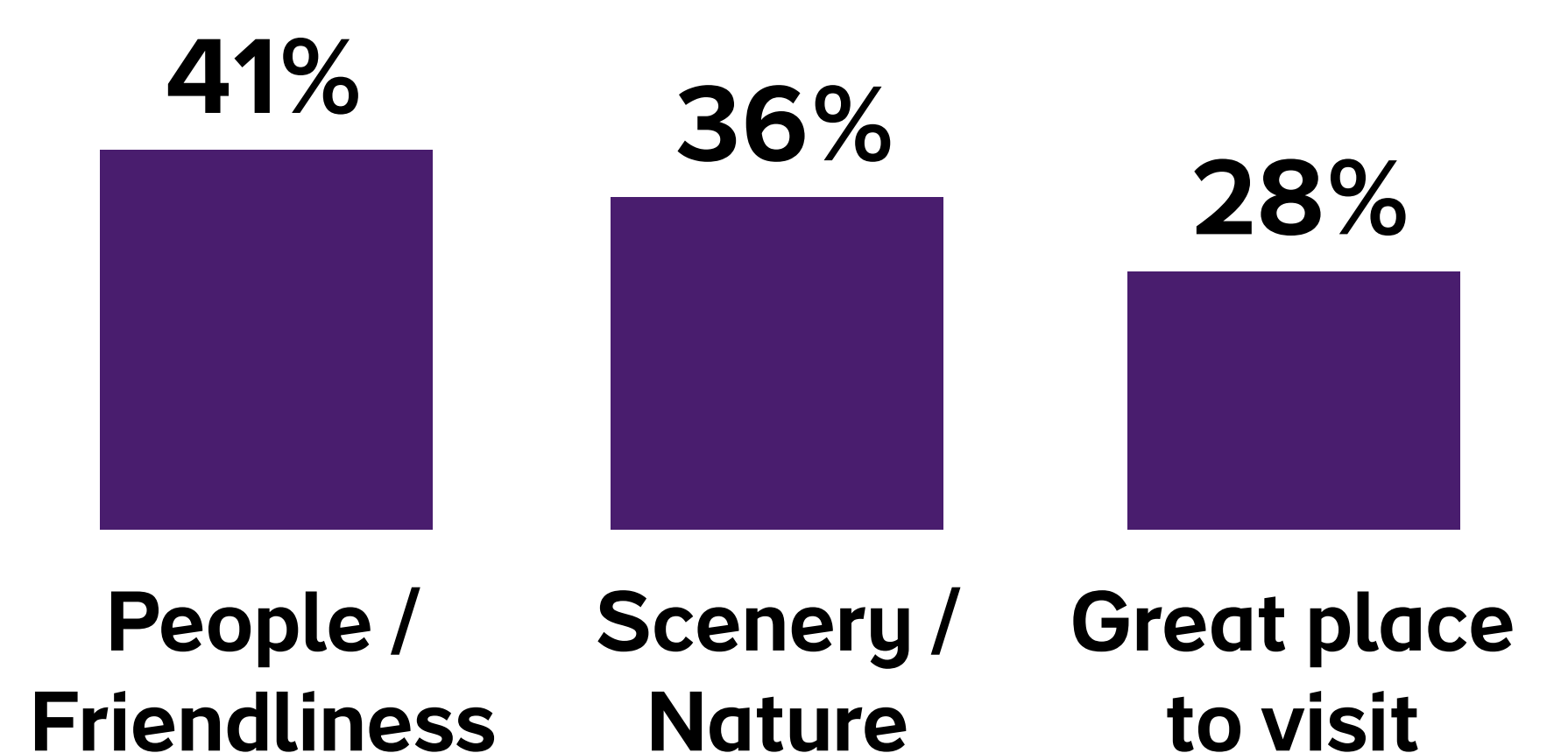
The majority (77%) of Dutch holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (41%), the scenery and nature (36%) and that it's generally a great place to visit (28%).



**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

Promoters - Top 3 reasons

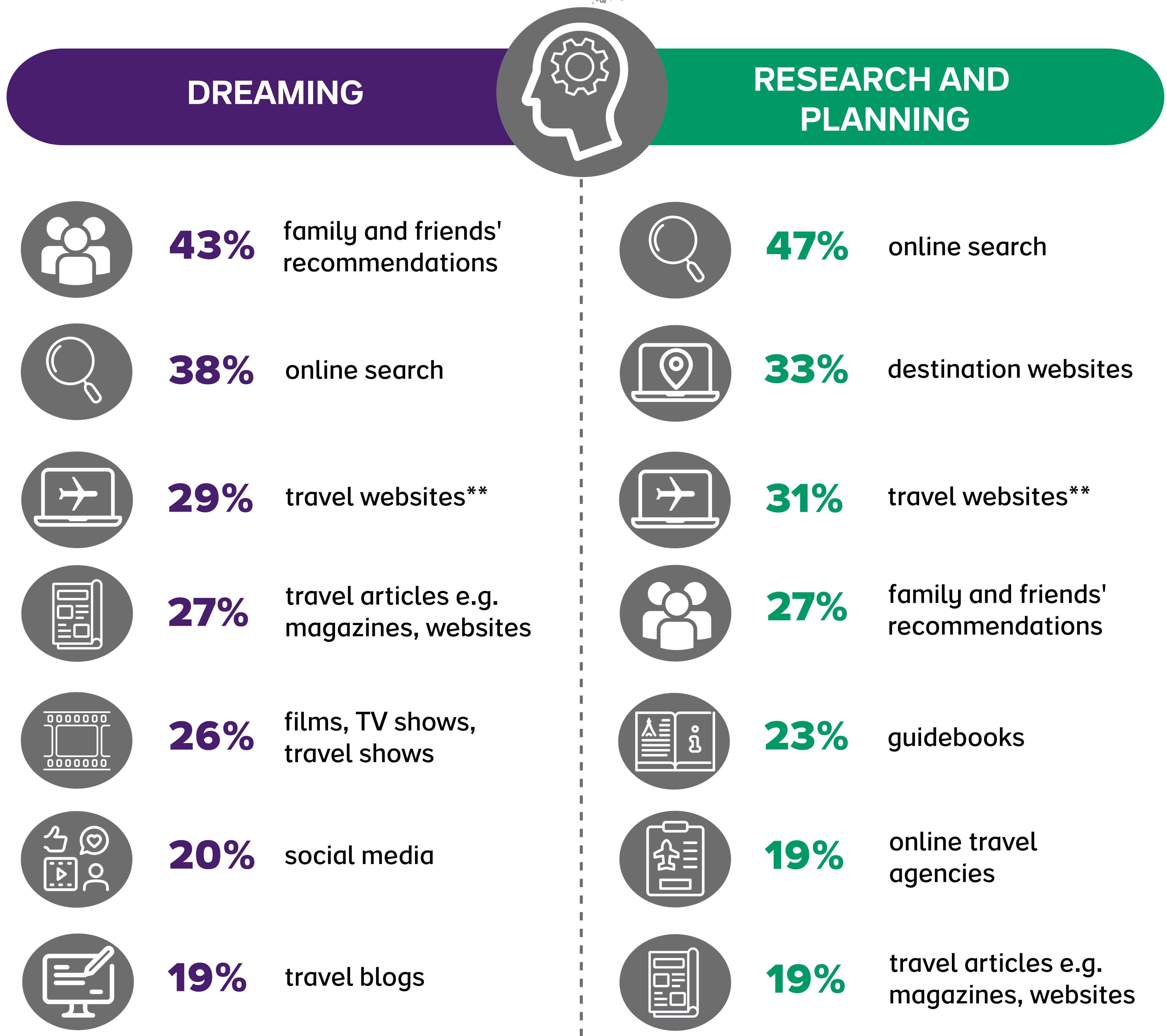
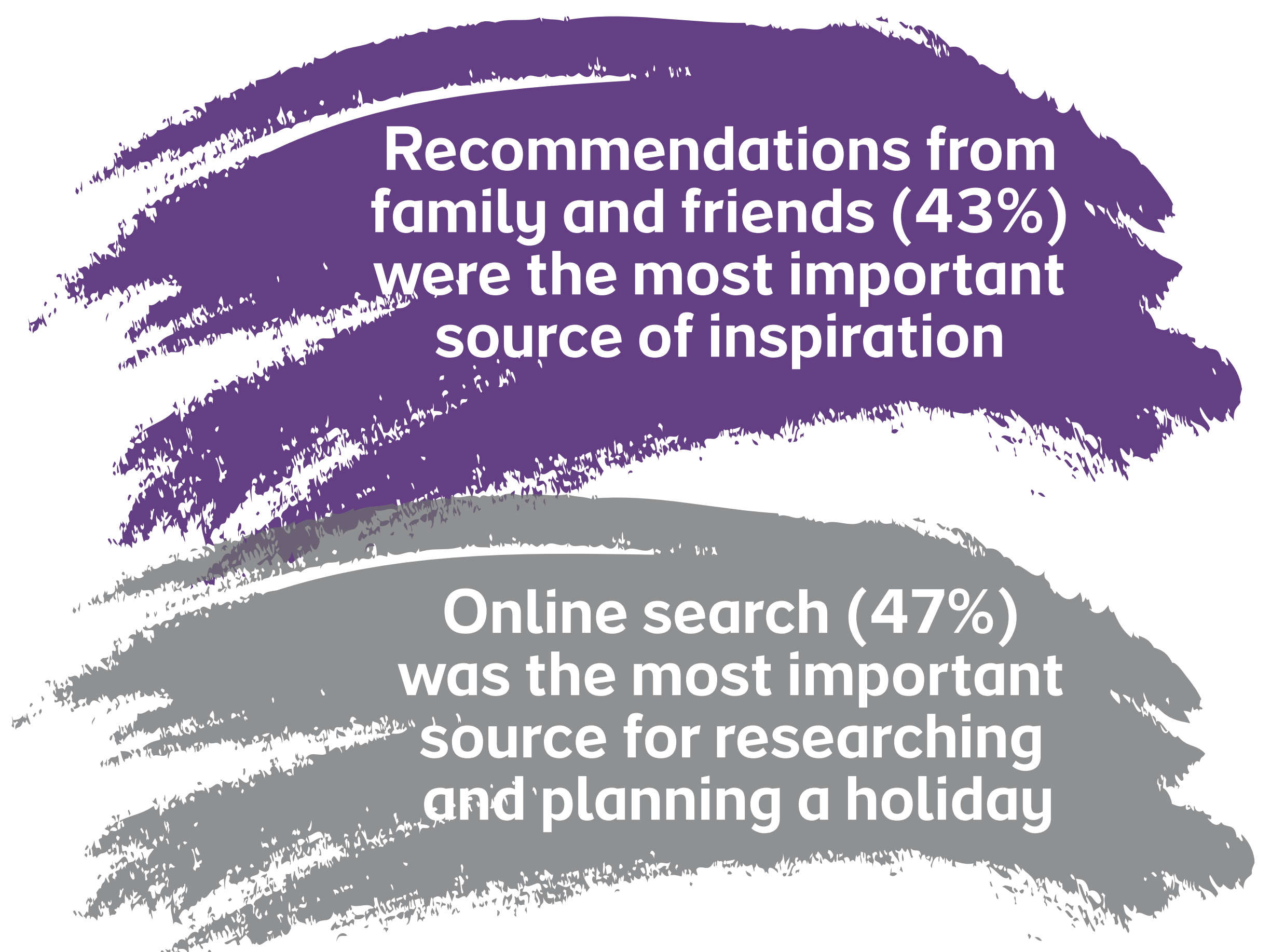


OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

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

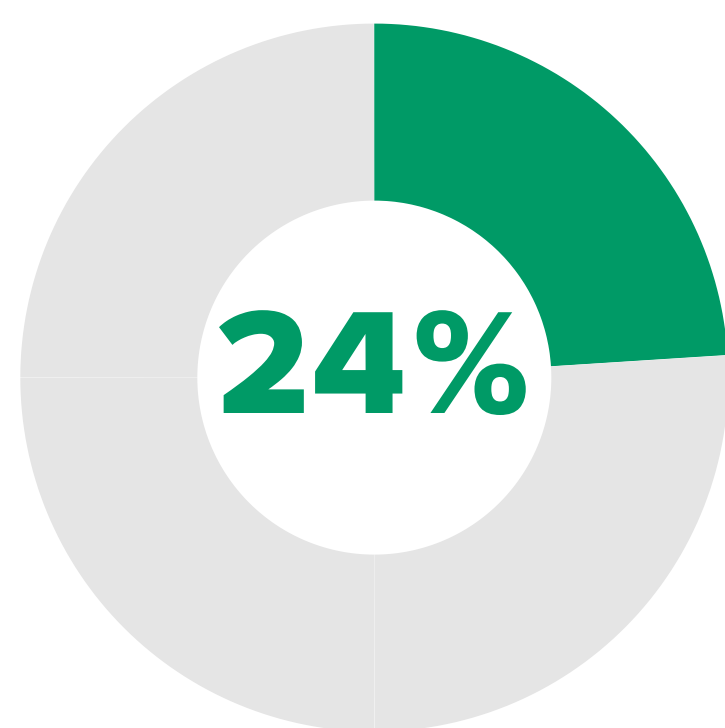
While social media, for example, is cited in its own right, it's often also a channel for the discovery of travel articles and recommendations.



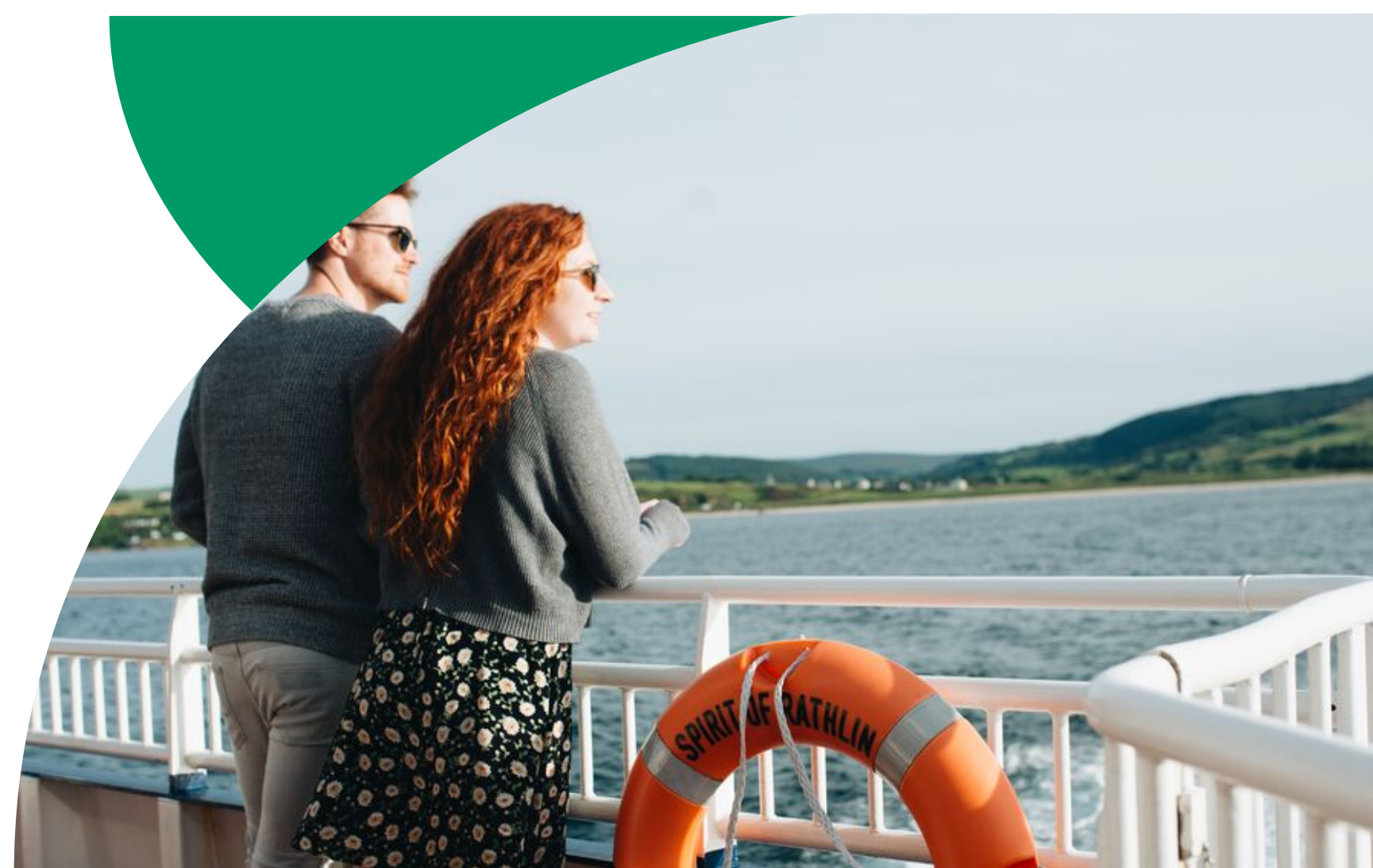
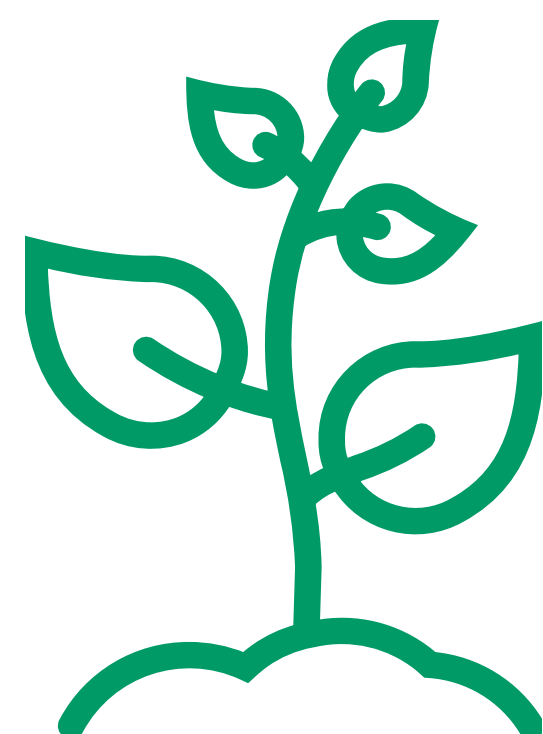
**Travel websites include company websites and booking platforms

ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



Global share of 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

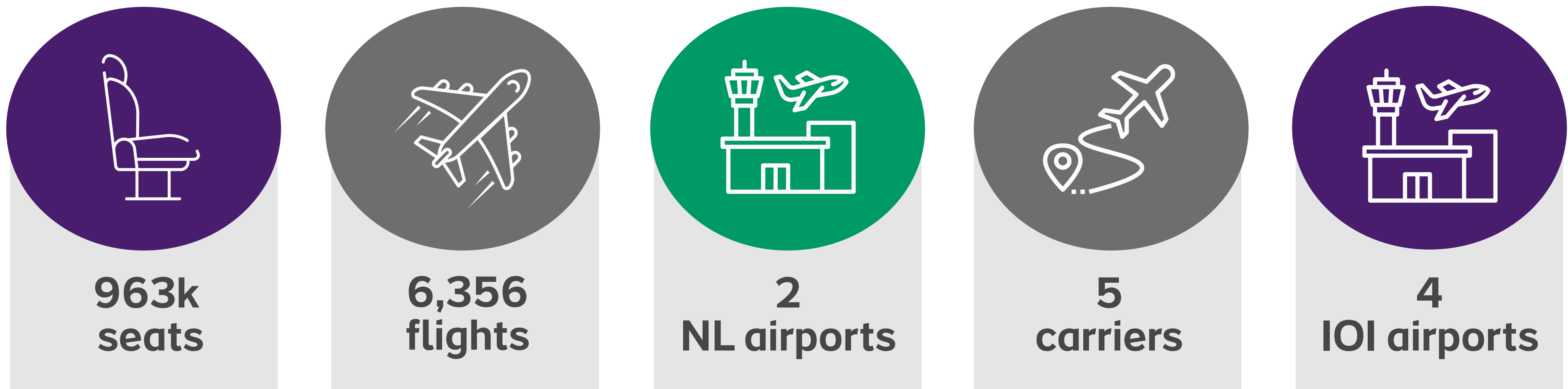
- 1  To feel connected to nature
- 2  To broaden and stimulate my mind
- 3  To feel the character of the place and people
- 4  To appreciate historical/modern architecture
- 5  To experience the vibrancy of the place and people
- 6  To experience living like a local
- 7  To enjoy authentic moments with 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

The Netherlands was the world's ninth-largest outbound market in 2023 and 90% of all outbound trips from the Netherlands were to other parts of Europe.

ACCESS BY AIR

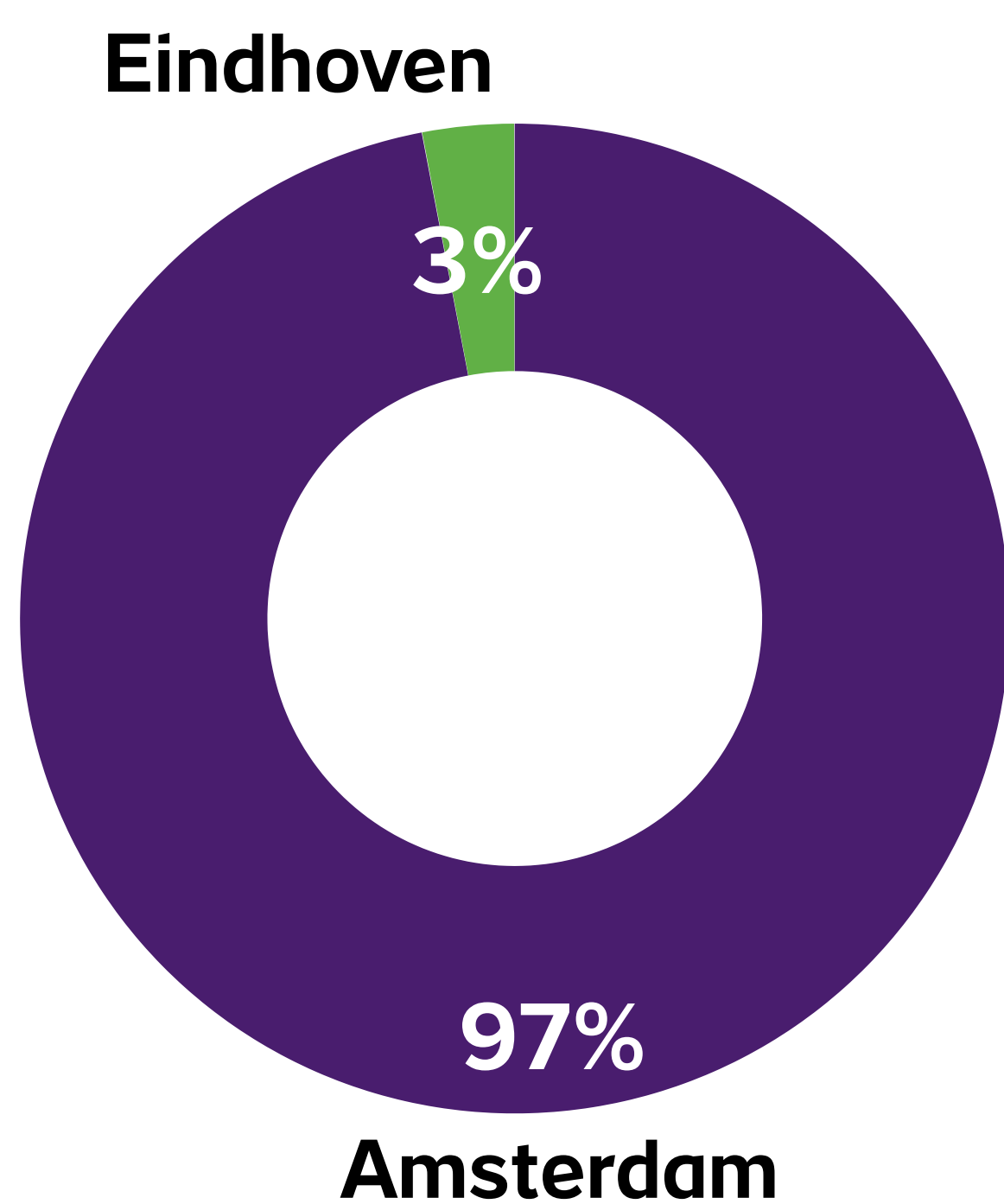
There were almost 963,000 direct one-way air seats available on over 6,000 flights from the Netherlands to the island of Ireland in 2023. There were two gateways from the Netherlands to airports on the island of Ireland.



WHERE CAN OUR TOURISTS FLY FROM?

Amsterdam accounted for the majority (97%) of seats in 2023.

Share of seats by airport



WHO CAN OUR TOURISTS FLY WITH?

Five carriers operated between the Netherlands and the island of Ireland. In 2023, Aer Lingus, Ryanair and KLM were responsible for delivering the vast majority (95%) of seats to the island of Ireland.

Share of seats by carrier

