

NETHERLANDS

MARKET PROFILE 2024



INBOUND TOURISTS

The island of Ireland welcomed around 238,000 Dutch tourists who spent over €177/£154 million and stayed 1.5 million nights. The Netherlands was the island's seventh-largest source of overseas tourists and the tenth-largest source of overseas revenue and nights.



WHERE DID OUR TOURISTS COME FROM?

More than two-fifths (43%) of Dutch tourists came from Holland (North and South provinces).

North Holland	North Brabant	South Holland	Gelderland	Utrecht	Overijssel	Other
27%	19%	16%	13%	8%	5%	11%

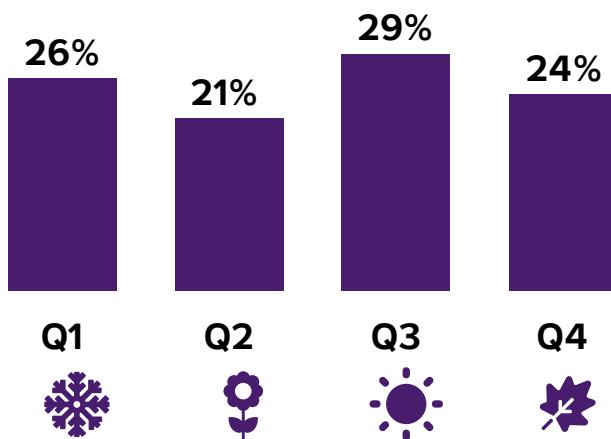
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?

The second half of the year accounted for just over half (53%) of all tourists from the Netherlands.



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 half (51%) of Dutch tourism revenue. Business tourists contributed a quarter of all revenue.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€91/£79m	51%	104k	44%	702k	46%
 VFR	€29/£25m	16%	67k	28%	442k	29%
 BUSINESS	€44/£38m	25%	53k	22%	218k	14%
 OTHER	€13/£11m	7%	14k	6%	162k	11%

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

On average, Dutch tourists spent €743/£646 per trip or €116/£101 per night and stayed 6.4 nights on the island of Ireland.

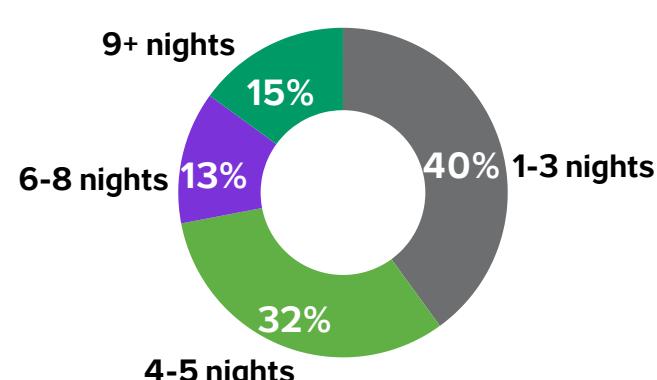
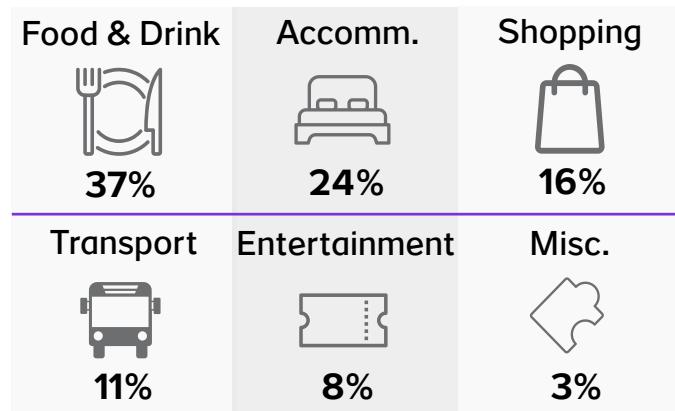


HOW DID OUR TOURISTS SPEND THEIR MONEY?

Almost two-fifths (37%) of Dutch tourists' revenue was spent on food and drink.

HOW LONG DID OUR TOURISTS STAY?

Three-fifths (60%) of Dutch tourists stayed 4+ nights on the island of Ireland.

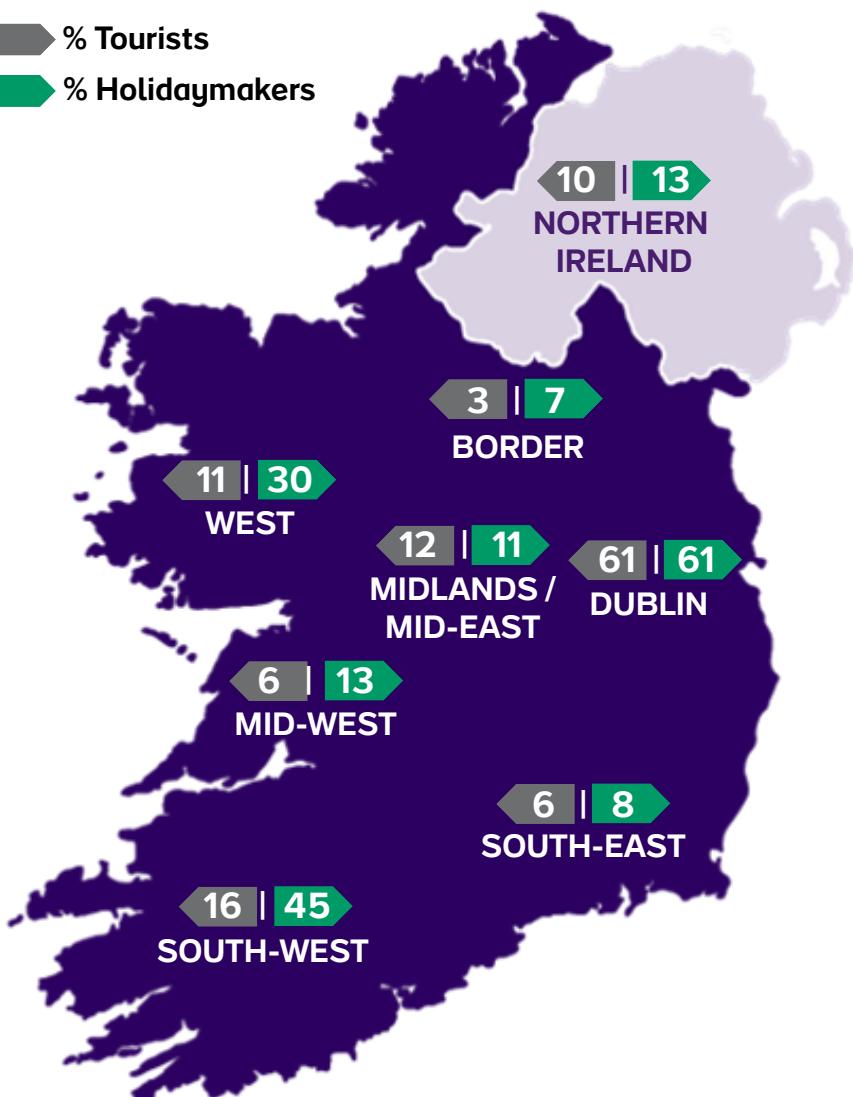


INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin and the South-West were the top destinations for Dutch tourists and holidaymakers, followed by the Mid-East & Midlands for tourists and The West for holidaymakers.

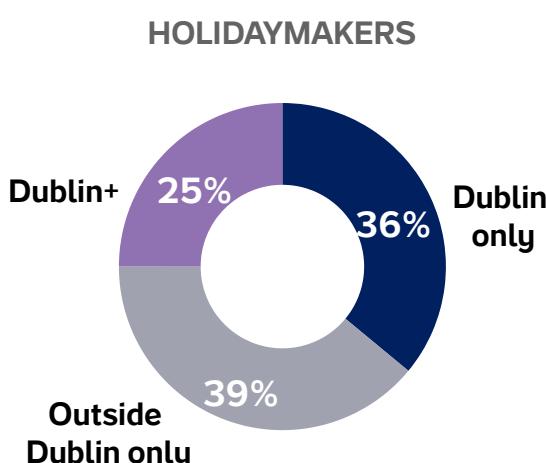
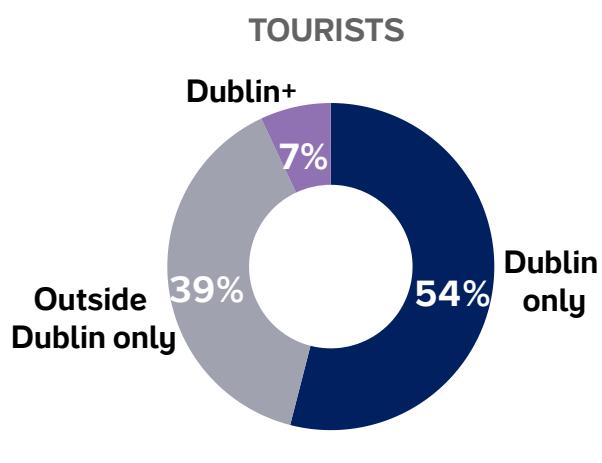
➡ % Tourists
➡ % Holidaymakers



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 (61%) and holidaymakers (61%).



INBOUND HOLIDAYMAKERS

The Netherlands was the island of Ireland's seventh-largest source of holiday nights and the eighth-largest source of holidaymakers and holiday revenue. Dutch holidaymakers stayed for an average of 6.7 nights on the island of Ireland. Those visiting Northern Ireland stayed an average of 4.3 nights.



€91/£79m
holiday revenue
#8
global rank



104k
holiday trips
#8
global rank



702k
holiday nights
#7
global rank



€871/£758 (IOI)
£378 (NI)
Av. spend per trip



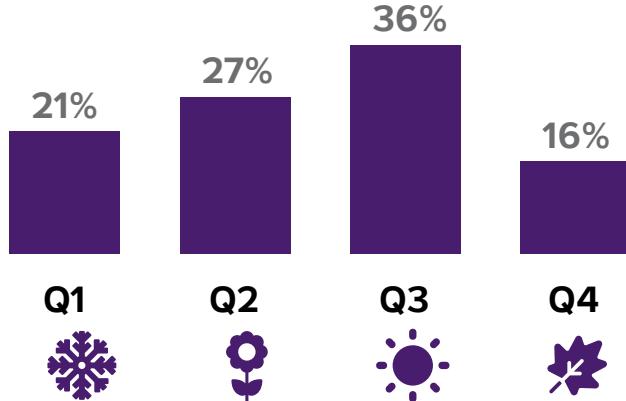
€129/£112 (IOI)
£87 (NI)
Av. spend per night



6.7 (IOI)
4.3 (NI)
Av. stay (nights)

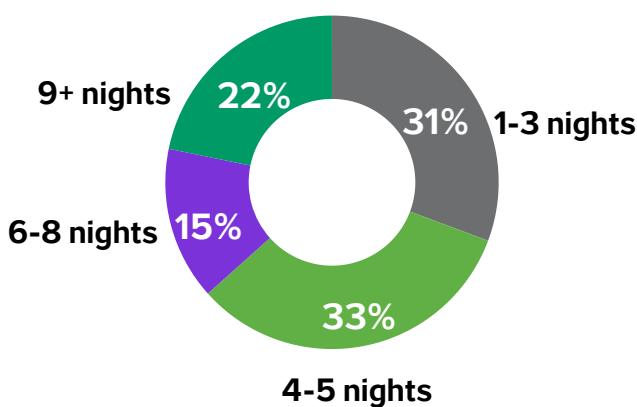
WHEN DID OUR HOLIDAYMAKERS VISIT?

Almost two-thirds (63%) visited the island of Ireland during Q2 and Q3 (April to September).



HOW LONG DID OUR HOLIDAYMAKERS STAY?

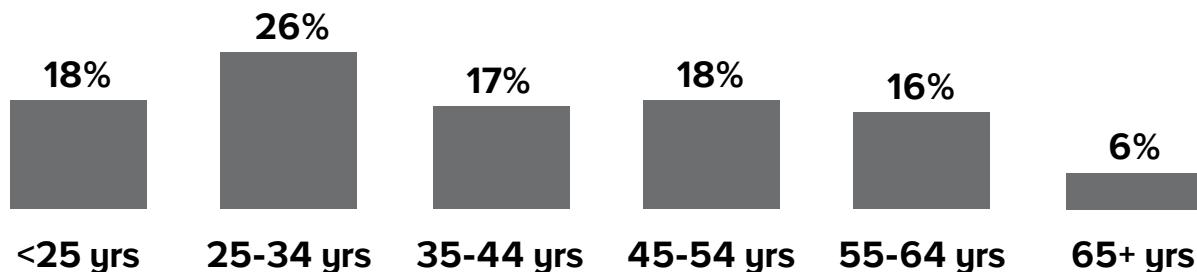
The majority (64%) of Dutch holidaymakers stayed up to five nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

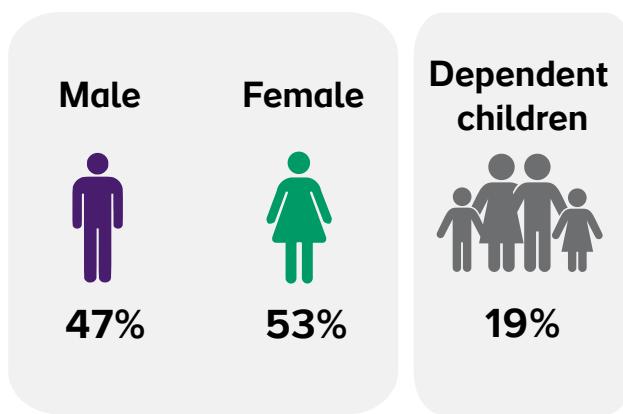
WHAT AGE WERE OUR HOLIDAYMAKERS?

Three-fifths (60%) of Dutch holidaymakers were under 45 years of age.



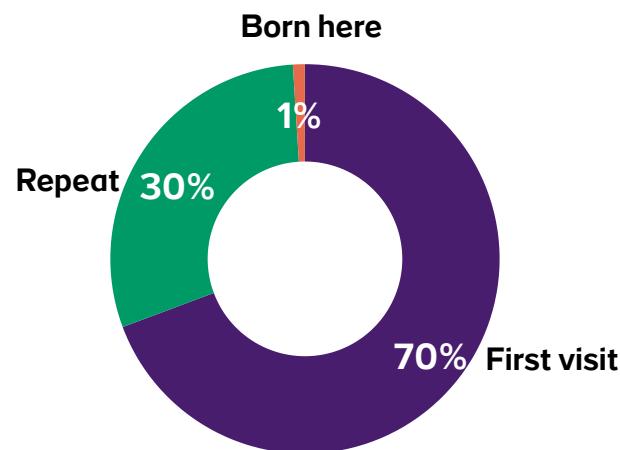
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

Around a fifth (19%) of Dutch holidaymakers had dependent children in the household.



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

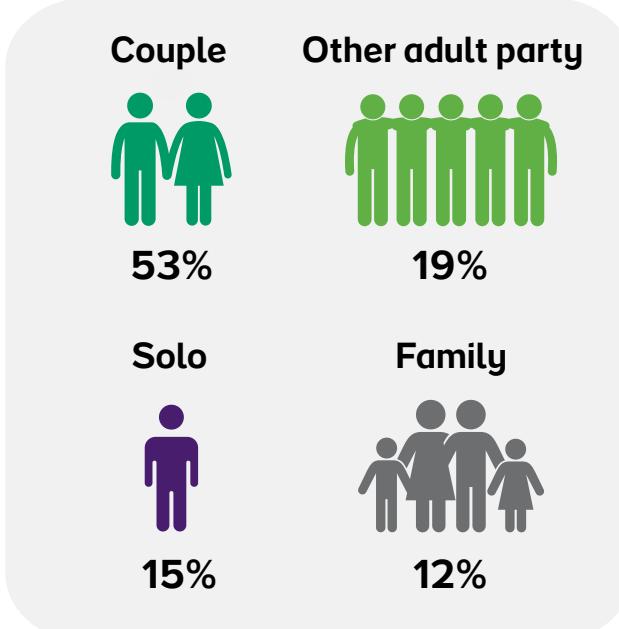
It was a first visit for around seven in ten (70%) of Dutch holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Over half (53%) of Dutch holidaymakers travelled with their spouse/partner.

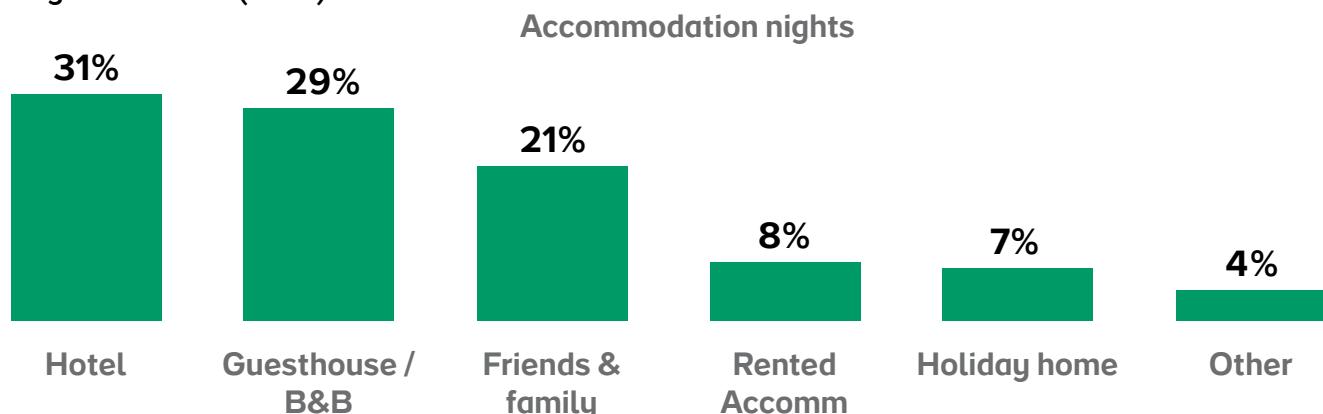
One-fifth (19%) visited with an "other adult party".



INBOUND HOLIDAYMAKERS

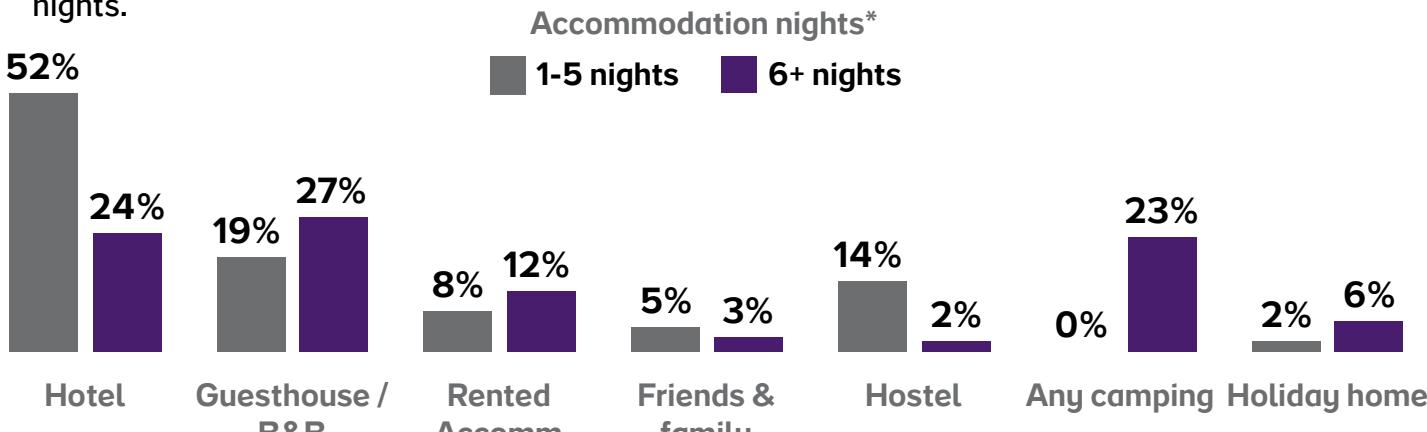
WHERE DID OUR HOLIDAYMAKERS STAY?

The majority (60%) of nights stayed by Dutch holidaymakers were in hotels (31%) and B&Bs or guesthouses (29%).



HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?

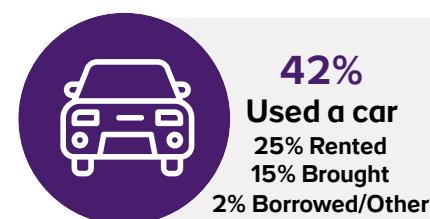
Hotels (52%) and to a lesser extent hostels (14%) were more popular among Dutch holidaymakers on shorter breaks (1-5 nights), while B&Bs or guesthouses (27%), camping or caravan (23%) and rented accommodation (12%) were more popular with those staying 6+ nights.



*Based on ROI only

HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

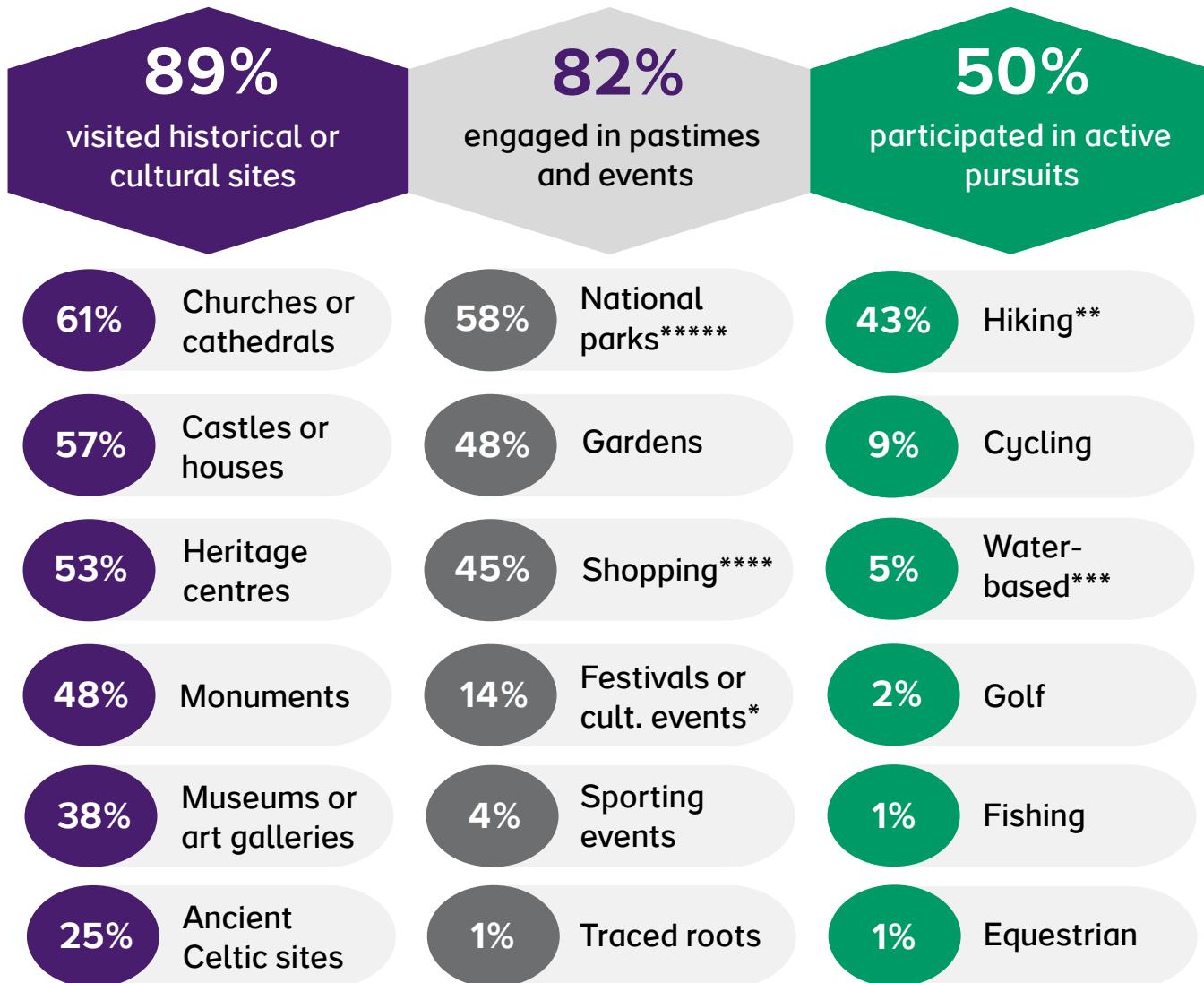
The majority (94%) of Dutch holidaymakers travelled independently and around two-fifths (42%) used a car during their trip on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

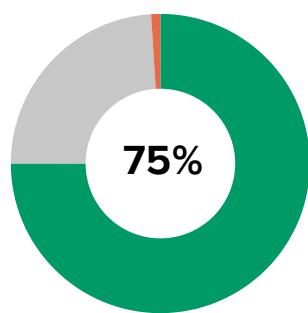
Dutch holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



*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

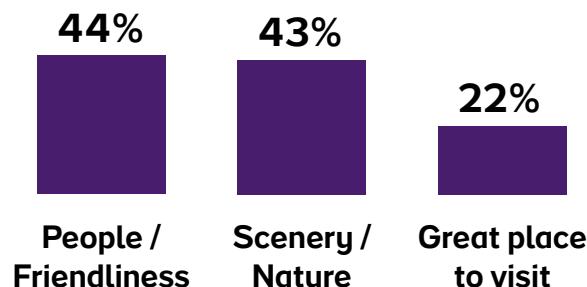
The majority (75%) of Dutch holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (44%), the scenery and nature (43%) and that it's generally a great place to visit (22%).



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.

Recommendations from family and friends (37%) were the most important source of inspiration

Online search (44%) was the most important source for researching and planning a holiday

DREAMING



37% family and friends' recommendations



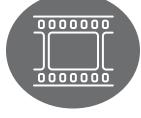
35% online search



29% destination website



26% travel websites and online travel agencies



26% social media



20% travel articles, blogs



18% films, TV shows, travel shows

RESEARCH AND PLANNING



44% online search



39% destination websites



37% travel websites**



21% family and friends' recommendations



20% travel articles, blogs



19% guidebooks



19% social media

**Travel websites included online travel agencies 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

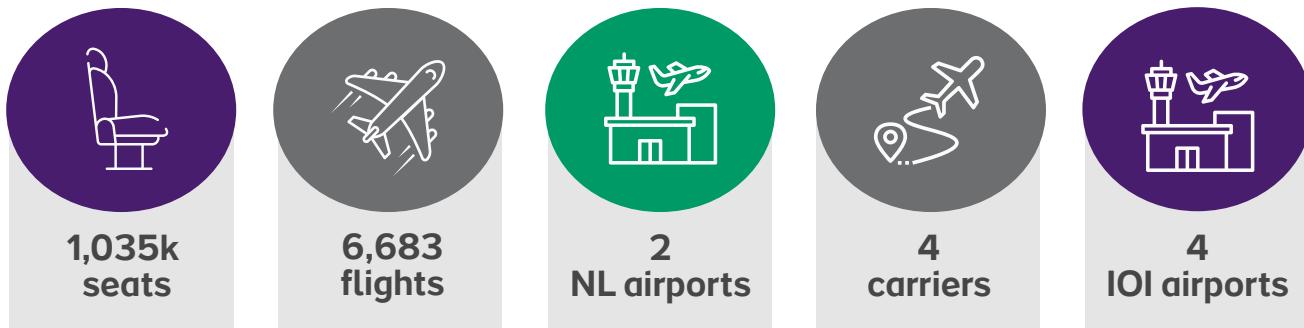
1		To feel connected to nature	6		To experience living like a local
2		To broaden and stimulate my mind	7		To enjoy authentic moments with friendly locals
3		To feel the character of the place and people	8		To be transported back in history
4		To appreciate historical/modern architecture	9		To discover and explore somewhere new
5		To experience the vibrancy of the place and people	10		To enjoy the beauty of the landscape

OUTBOUND TOURISTS

The Netherlands was the world's seventh-largest outbound market in 2024 and 89% of all outbound trips from the Netherlands were to other parts of Europe.

ACCESS BY AIR

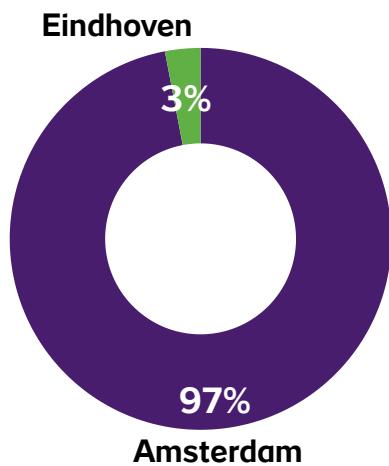
There were over one million direct one-way air seats available on almost 6,700 flights from the Netherlands to the island of Ireland in 2024. There were two gateways from the Netherlands to airports on the island of Ireland.



WHERE CAN OUR TOURISTS FLY FROM?

The majority (97%) of seats in 2024 came from Amsterdam.

Share of seats by airport



WHO CAN OUR TOURISTS FLY WITH?

Four carriers operated between the Netherlands and the island of Ireland. In 2024, Aer Lingus, Ryanair and KLM were responsible for delivering the vast majority (96%) of seats to the island of Ireland.

Share of seats by carrier

