

# NETHERLANDS

## MARKET PROFILE

### 2024



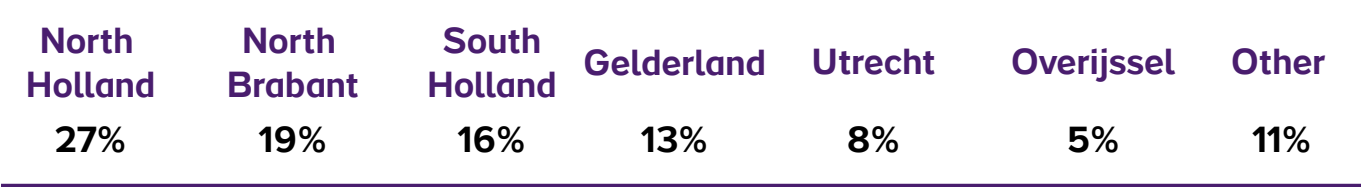
### INBOUND TOURISTS

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).



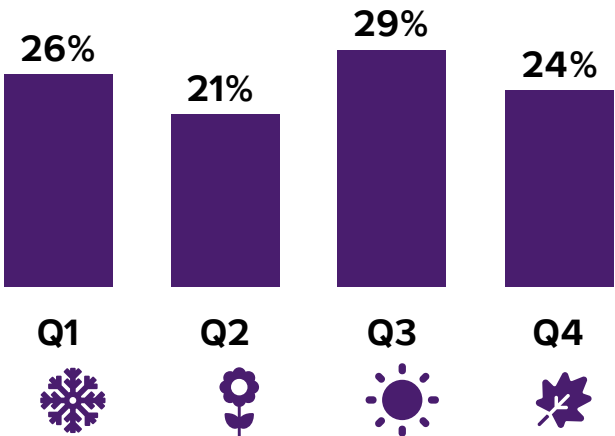
### WHERE DID OUR TOURISTS VISIT?



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

### WHEN DID OUR TOURISTS VISIT?





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.




€743/£646 (IOI)  
£451 (NI)

Av. spend per trip



€116/£101 (IOI)  
£72 (NI)

Av. spend per night









6.4 (IOI)  
6.3 (NI)

Av. stay (nights)

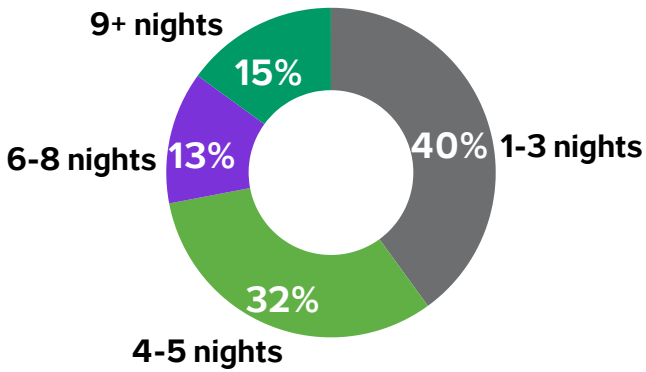
## HOW DID OUR TOURISTS SPEND THEIR MONEY?

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

|  |  |  |
|--|--|--|
| Food & Drink<br><br>37% | Accomm.<br><br>24%      | Shopping<br><br>16% |
| Transport<br><br>11%    | Entertainment<br><br>8% | Misc.<br><br>3%     |

## HOW LONG DID OUR TOURISTS STAY?

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



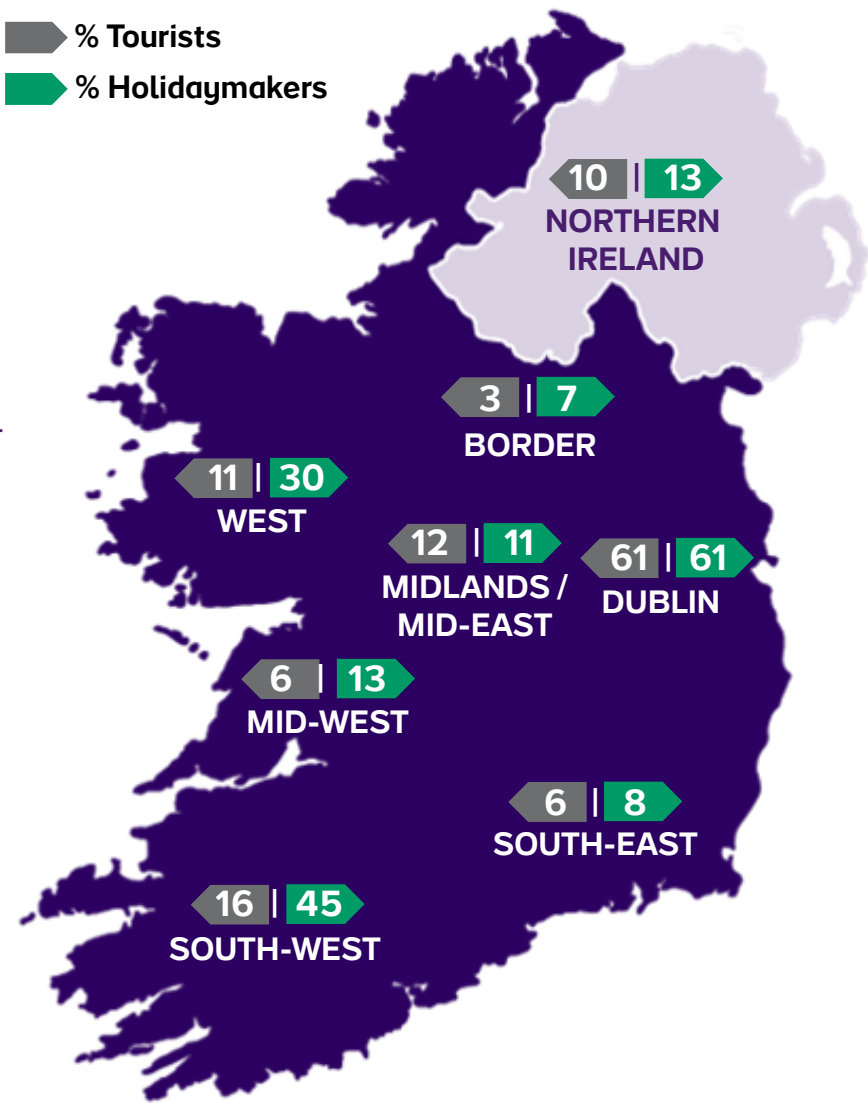
# INBOUND TOURISTS AND HOLIDAYMAKERS

## 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.

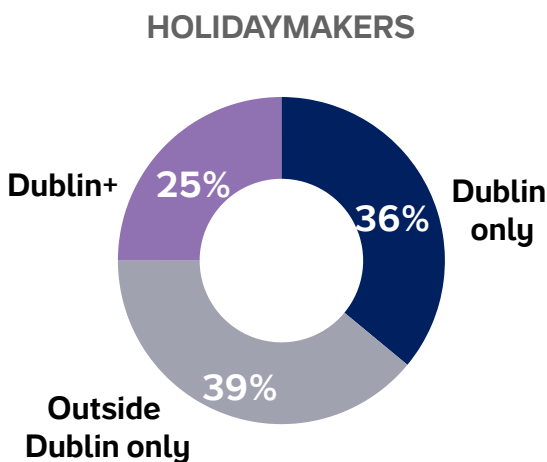
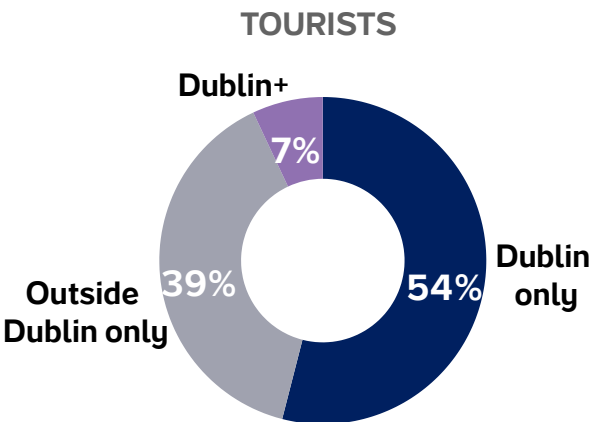
| Rank | Tourists            | Holidaymakers |
|------|---------------------|---------------|
| #1   | Dublin              | Dublin        |
| #2   | South-West          | South-West    |
| #3   | Mid-East & Midlands | West          |

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



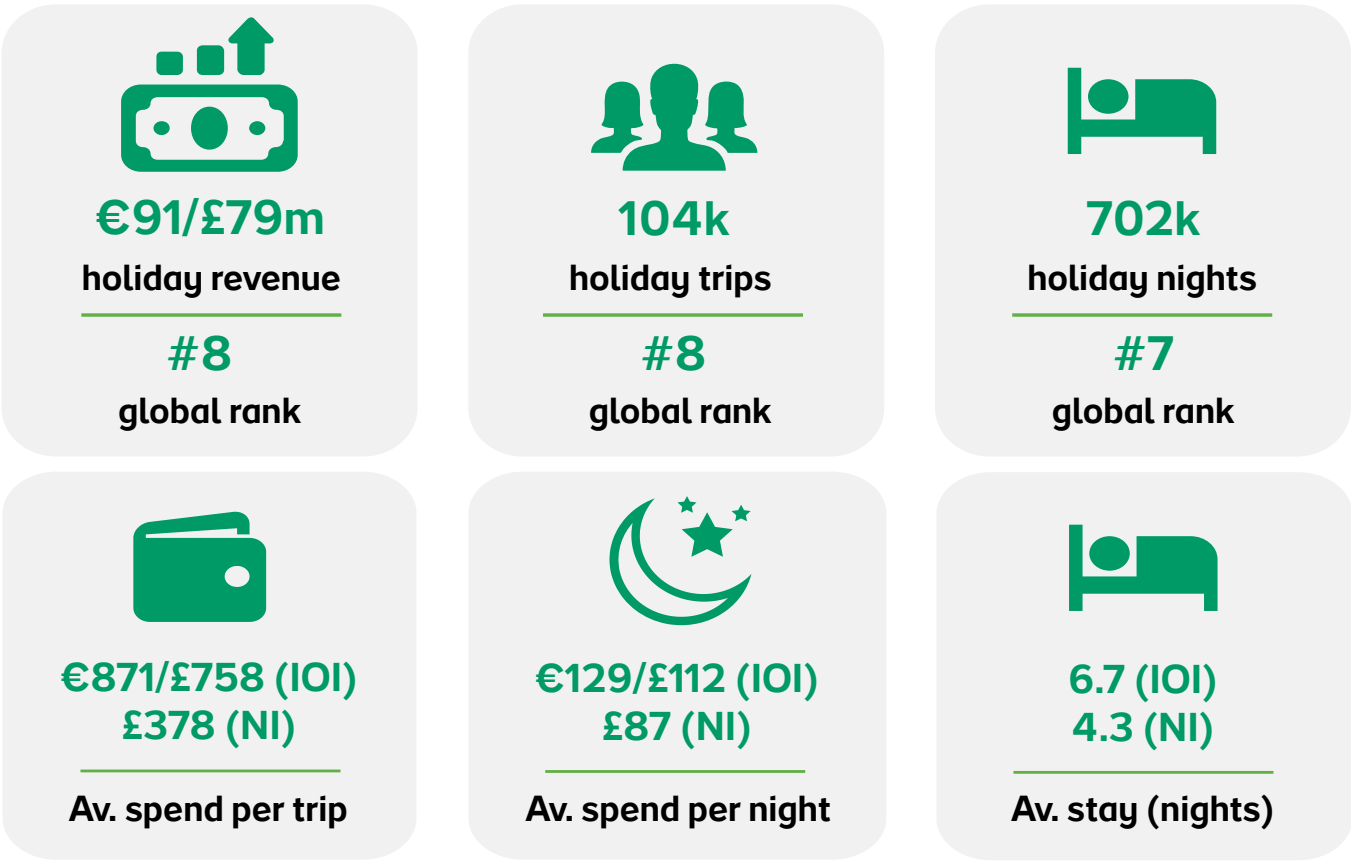
## WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of Dutch tourists (61%) and holidaymakers (61%).



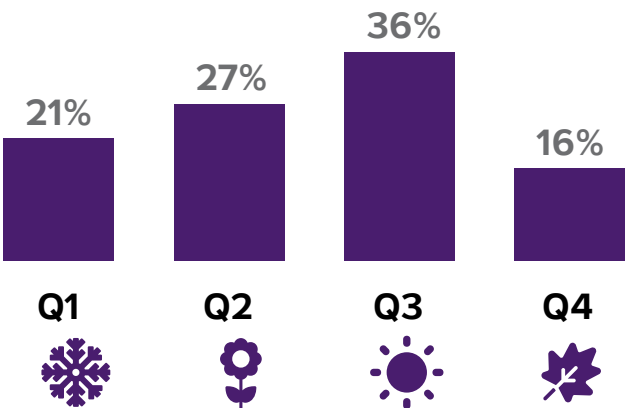
# INBOUND HOLIDAYMAKERS

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.



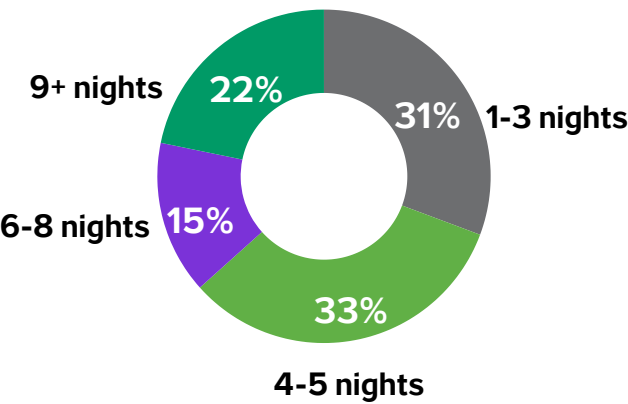
## WHEN DID OUR HOLIDAYMAKERS VISIT?

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



## HOW LONG DID OUR HOLIDAYMAKERS STAY?

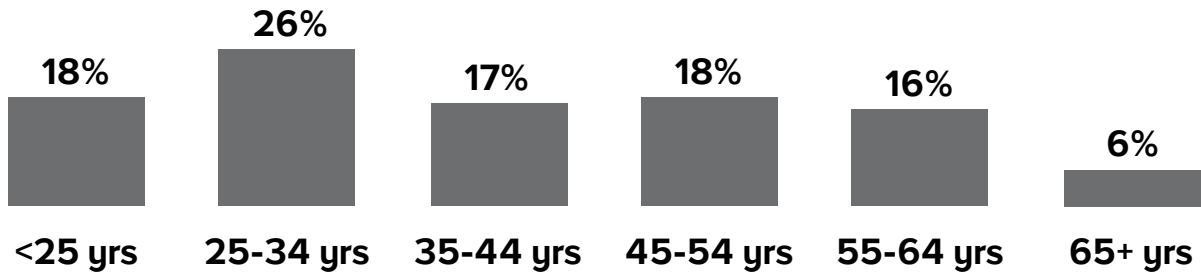
The majority (64%) of Dutch holidaymakers stayed up to five nights on the island of Ireland.



# INBOUND HOLIDAYMAKERS

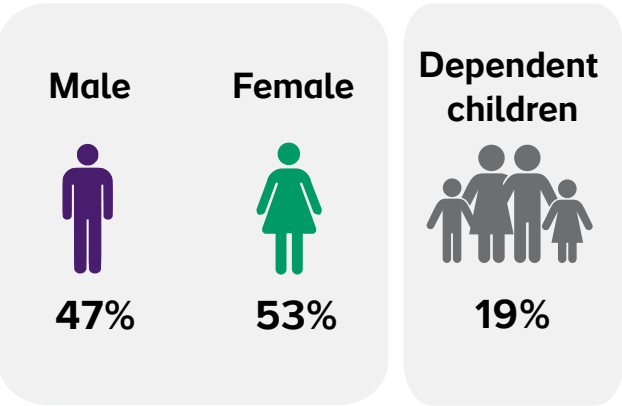
## WHAT AGE WERE OUR HOLIDAYMAKERS?

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



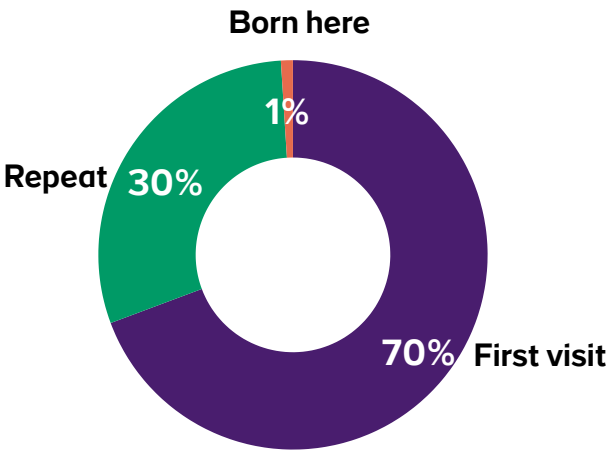
## HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

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



## HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

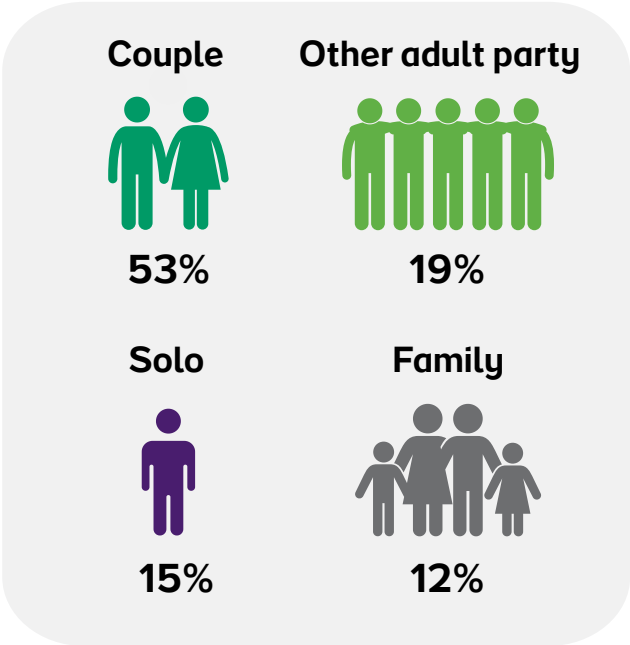
It was a first visit for around seven in ten (70%) of Dutch holidaymakers.



## WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

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

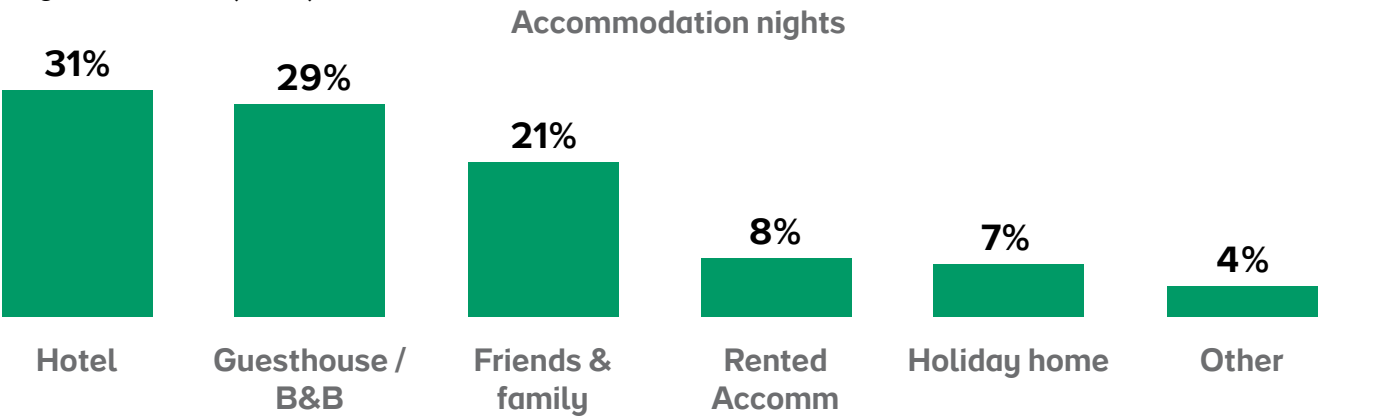
One-fifth (19%) visited with an "other adult party".



# INBOUND HOLIDAYMAKERS

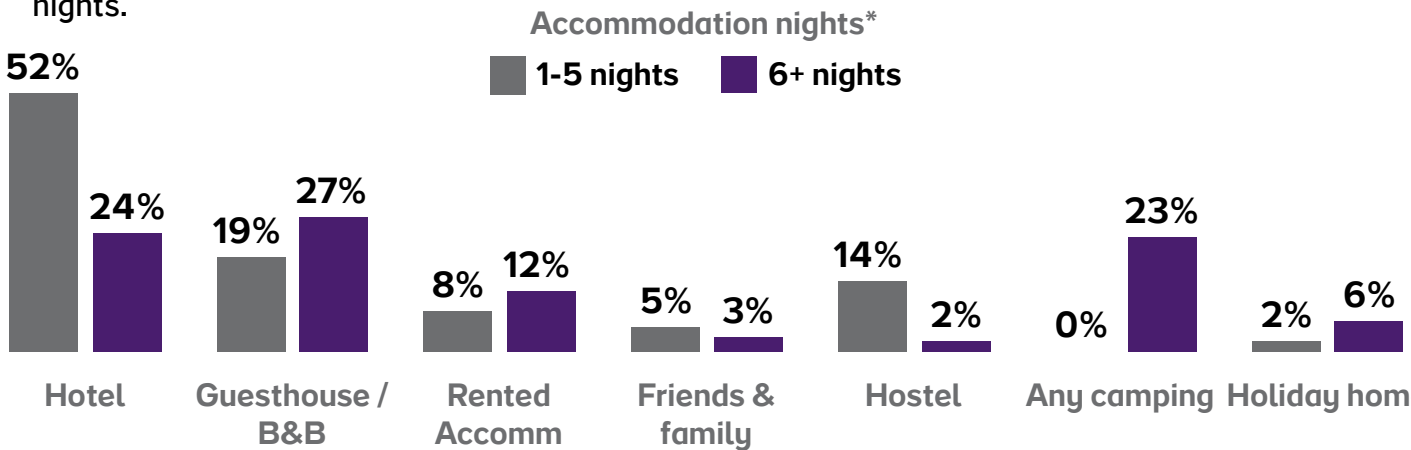
## WHERE DID OUR HOLIDAYMAKERS STAY?

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?

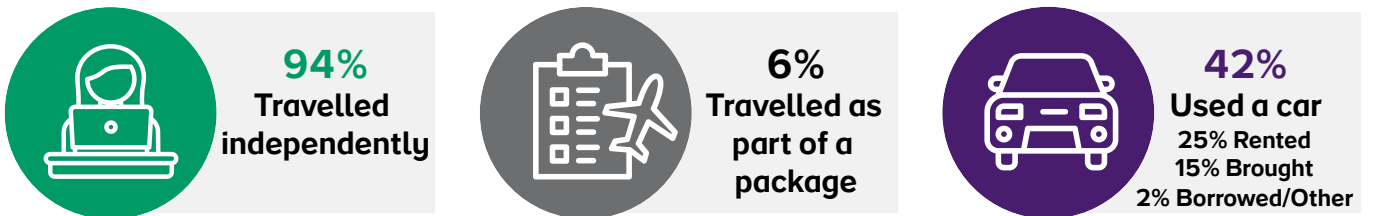
Hotels (52%) and to a lesser extent hostels (14%) were more popular among Dutch holidaymakers on shorter breaks (1-5 nights), while B&Bs or guesthouses (27%), camping or caravan (23%) and rented accommodation (12%) were more popular with those staying 6+ nights.



\*Based on ROI only

## HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

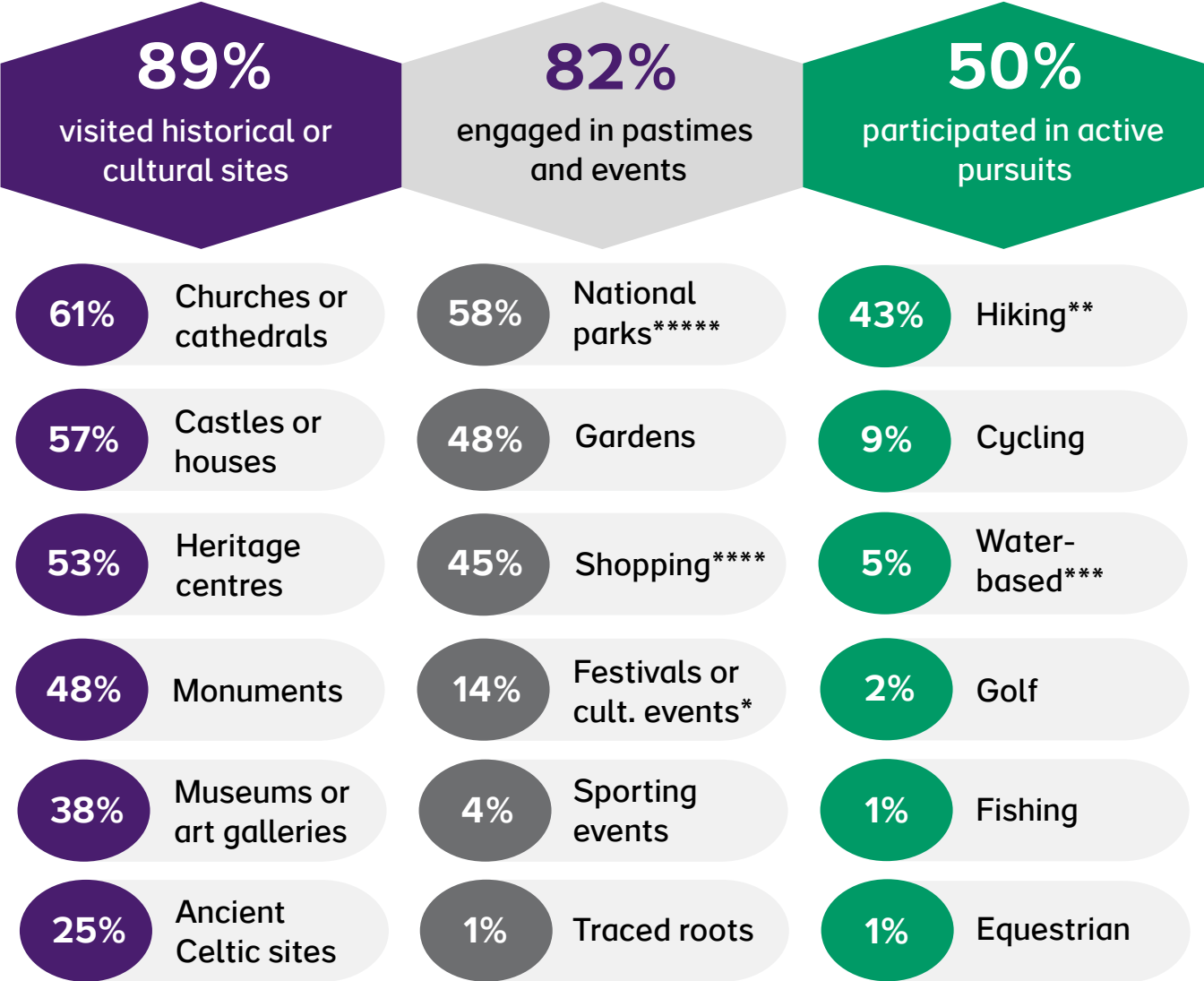
The majority (94%) of Dutch holidaymakers travelled independently and around two-fifths (42%) used a car during their trip on the island of Ireland.



# INBOUND HOLIDAYMAKERS

## WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

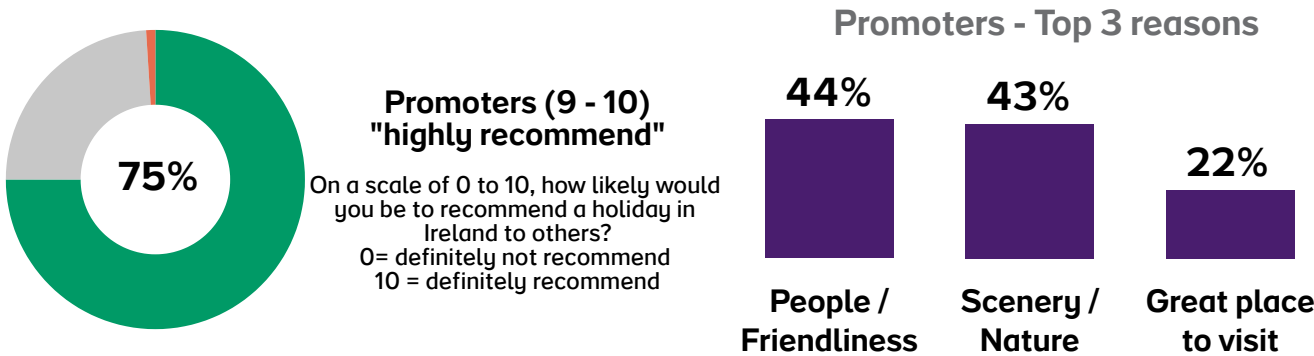
Dutch holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



\*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%).



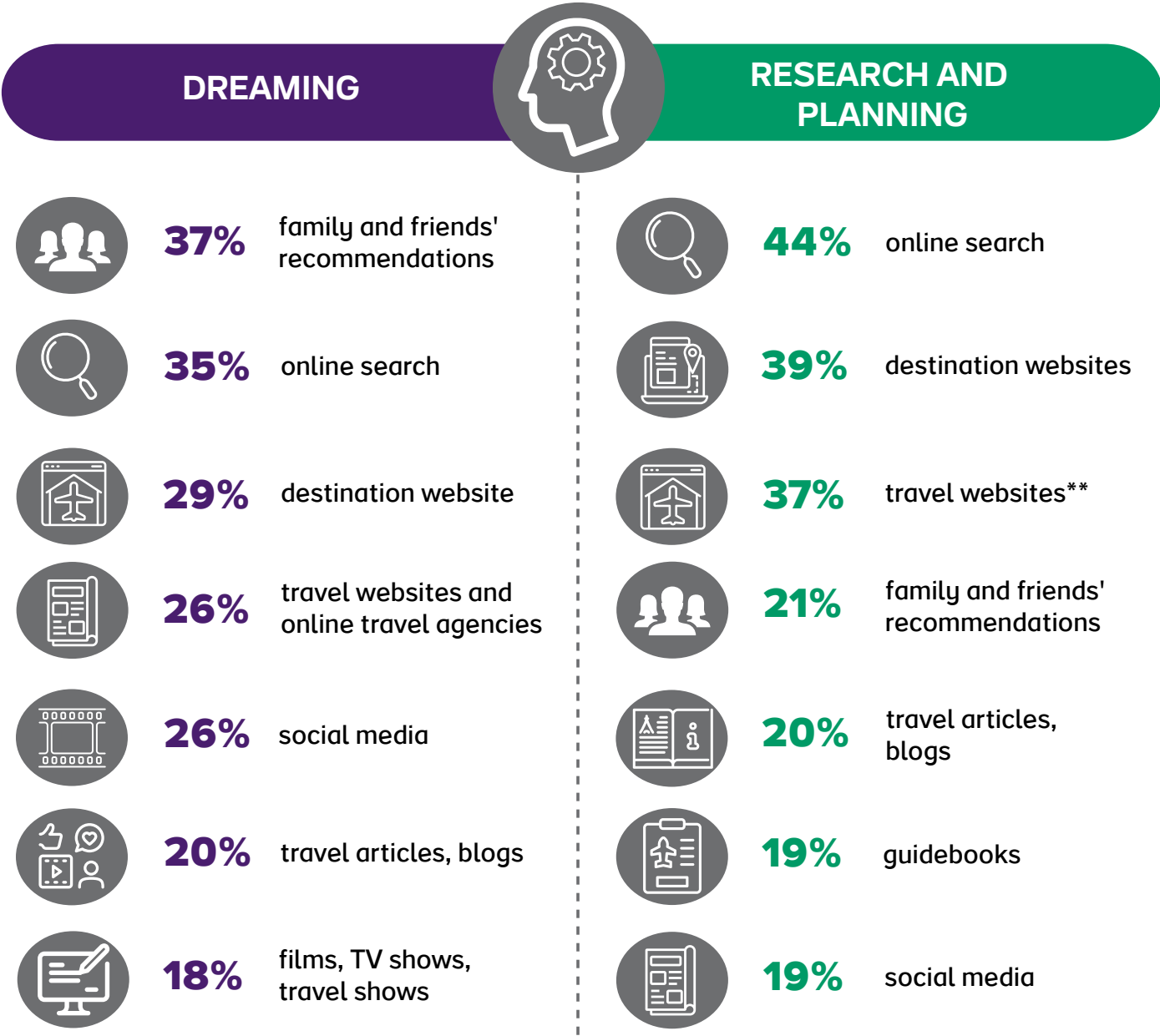


# OUTBOUND HOLIDAYMAKERS

## 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.

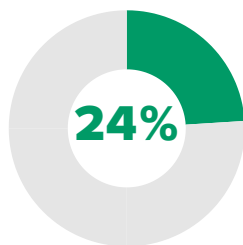


**\*\*Travel websites included online travel agencies company websites and booking platforms**

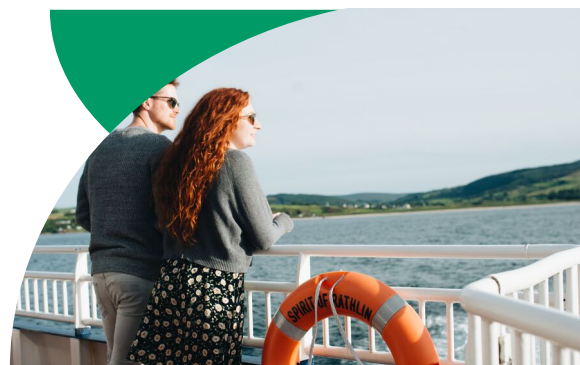


# ENRICHMENT EXPLORERS

## 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            |

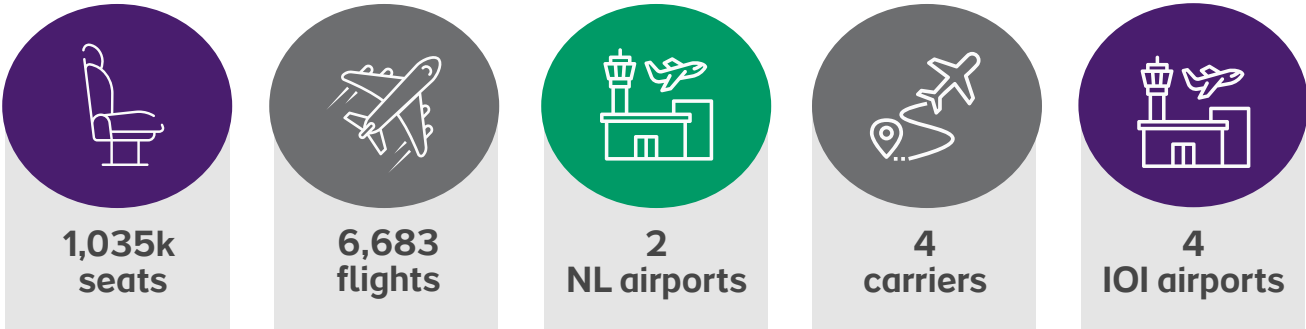


# OUTBOUND TOURISTS

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.



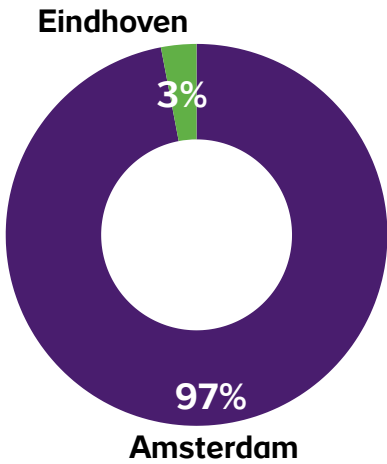
### WHERE CAN OUR TOURISTS FLY FROM?

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

### 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 airport



Share of seats by carrier

