

ITALY

MARKET PROFILE 2023



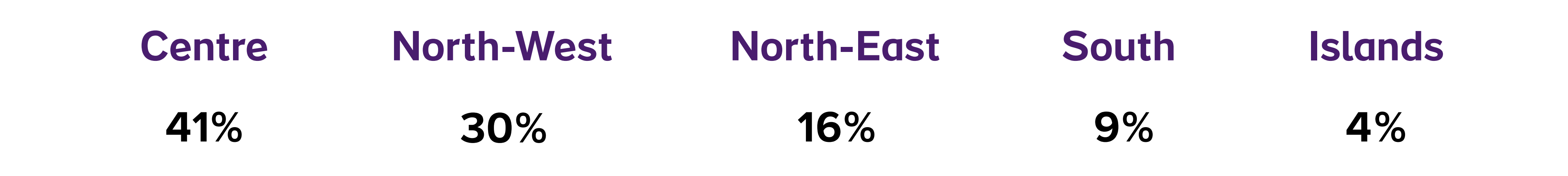
INBOUND TOURISTS

The island of Ireland welcomed around 229,000 Italian tourists who spent over €192/£167 million and stayed 2.1 million nights. Italy was the island's sixth-largest source of overseas tourists and the eighth-largest source of overseas revenue.



WHERE DID OUR TOURISTS COME FROM?

The majority (71%) of Italian tourists came from the Centre (41%) and the North-West (30%).



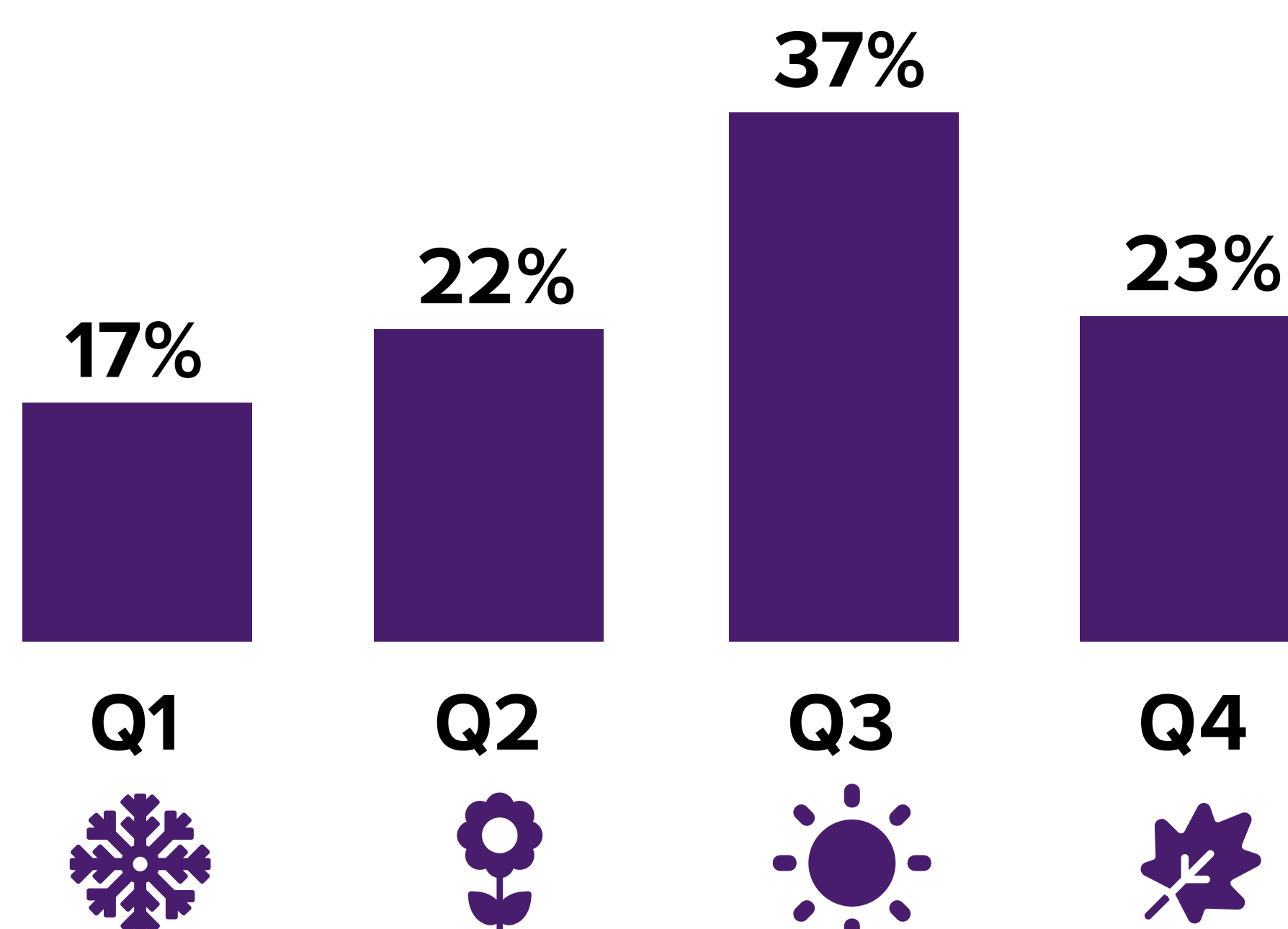
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?





Over four-fifths (83%) of Italian tourists visited the island during Q2 through to Q4 (April - December).



INBOUND TOURISTS

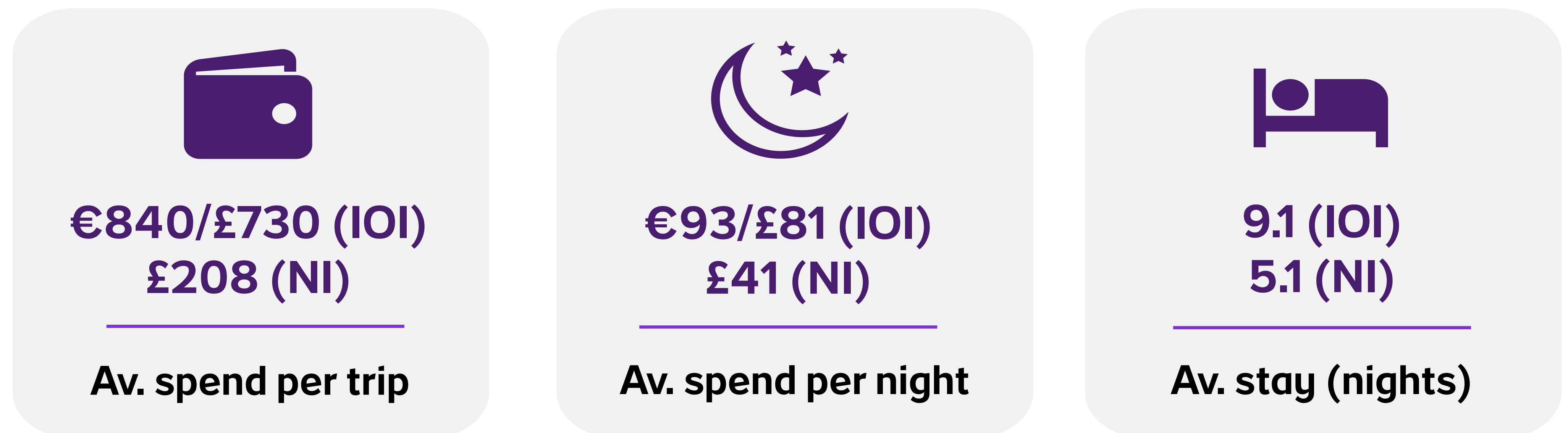
WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Over two-fifths (44%) of Italian tourists visiting the island of Ireland came for a holiday, accounting for 39% of Italian tourism revenue. Around one-in-seven (16%) were visiting for "other" reasons, accounting for the second largest share (37%) of Italian tourism revenue.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€76/£66m	39%	100k	44%	560k	27%
 VFR	€21/£19m	11%	62k	27%	434k	21%
 BUSINESS	€24/£21m	12%	31k	14%	207k	10%
 OTHER	€72/£62m	37%	37k	16%	877k	42%

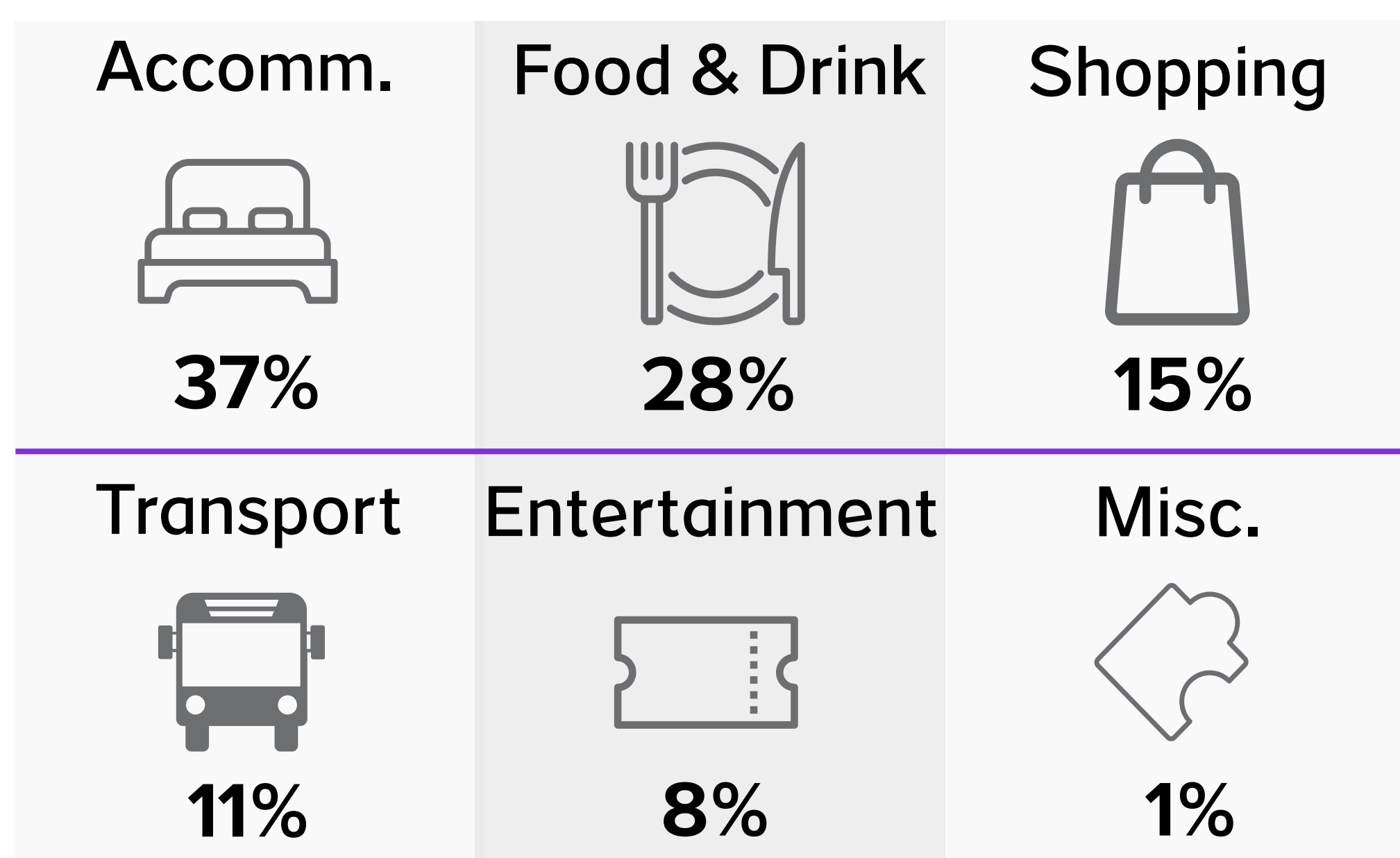
HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?

On average, Italian tourists spent €840/£730 per trip or €93/£81 per night and stayed 9.1 nights on the island of Ireland.



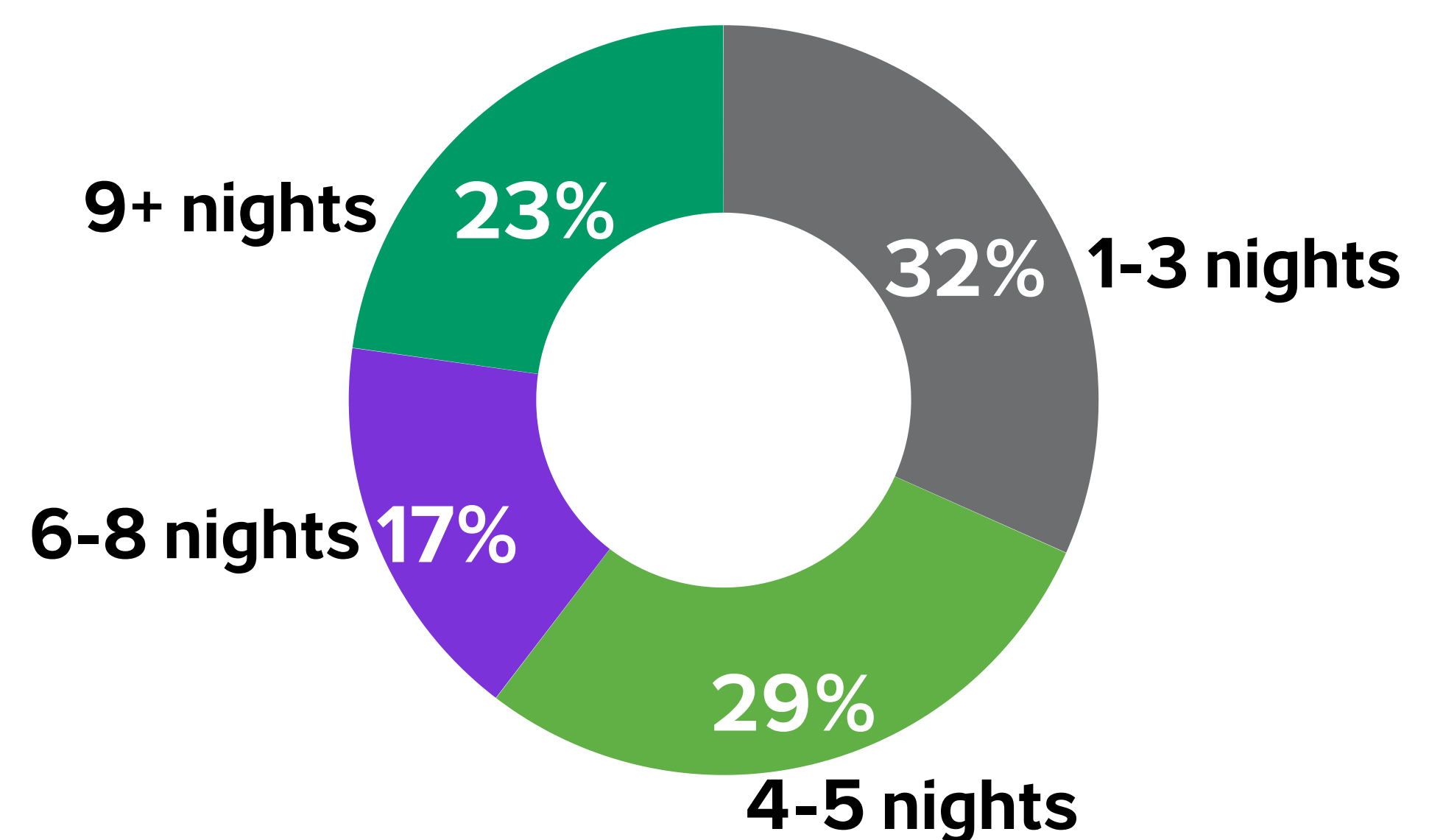
HOW DID OUR TOURISTS SPEND THEIR MONEY?

Almost two-fifths (37%) of Italian tourists' revenue was spent on accommodation.



HOW LONG DID OUR TOURISTS STAY?

Around two-thirds (68%) stayed four or more nights on the island of Ireland.



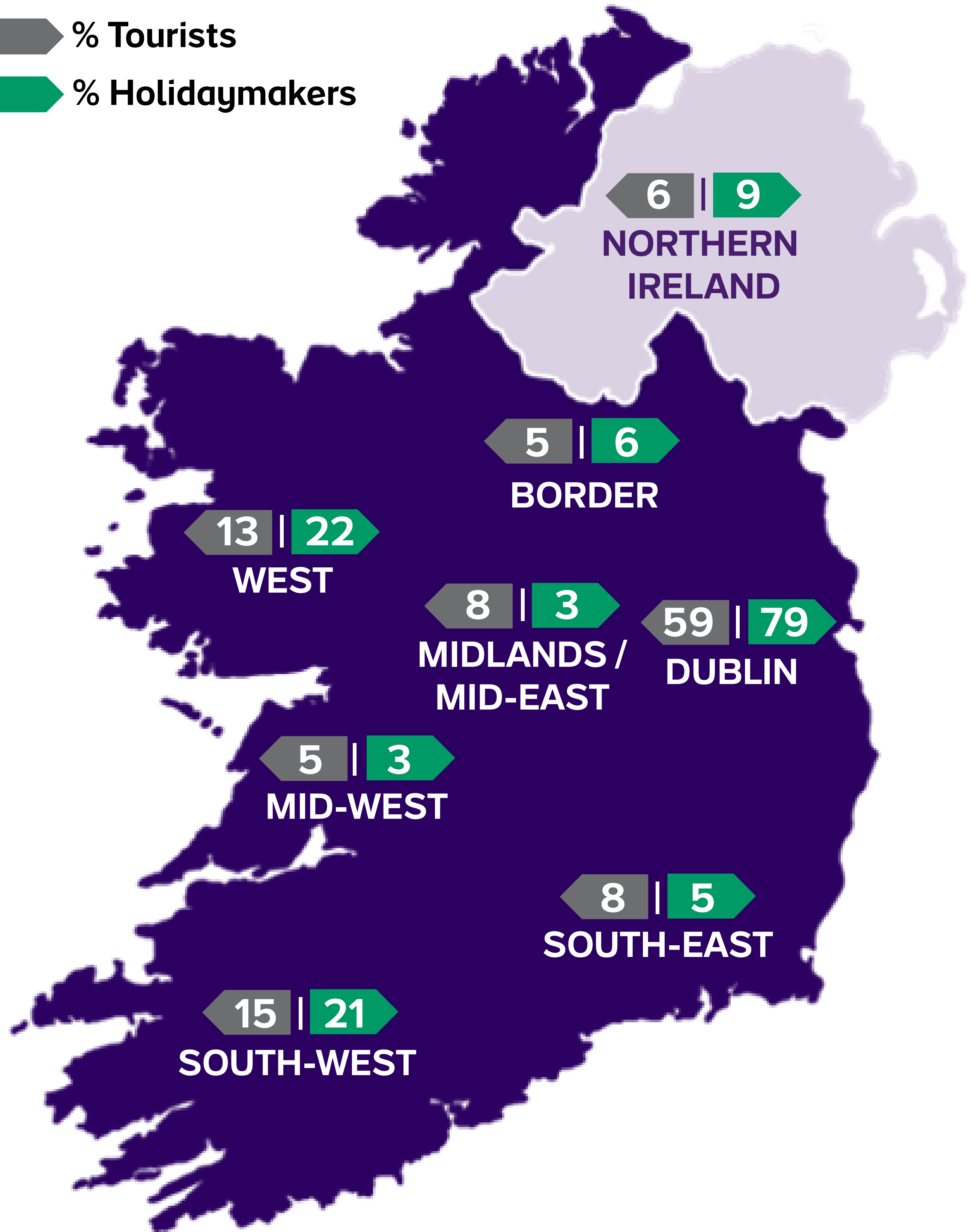
INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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

➤ % Tourists
➤ % Holidaymakers

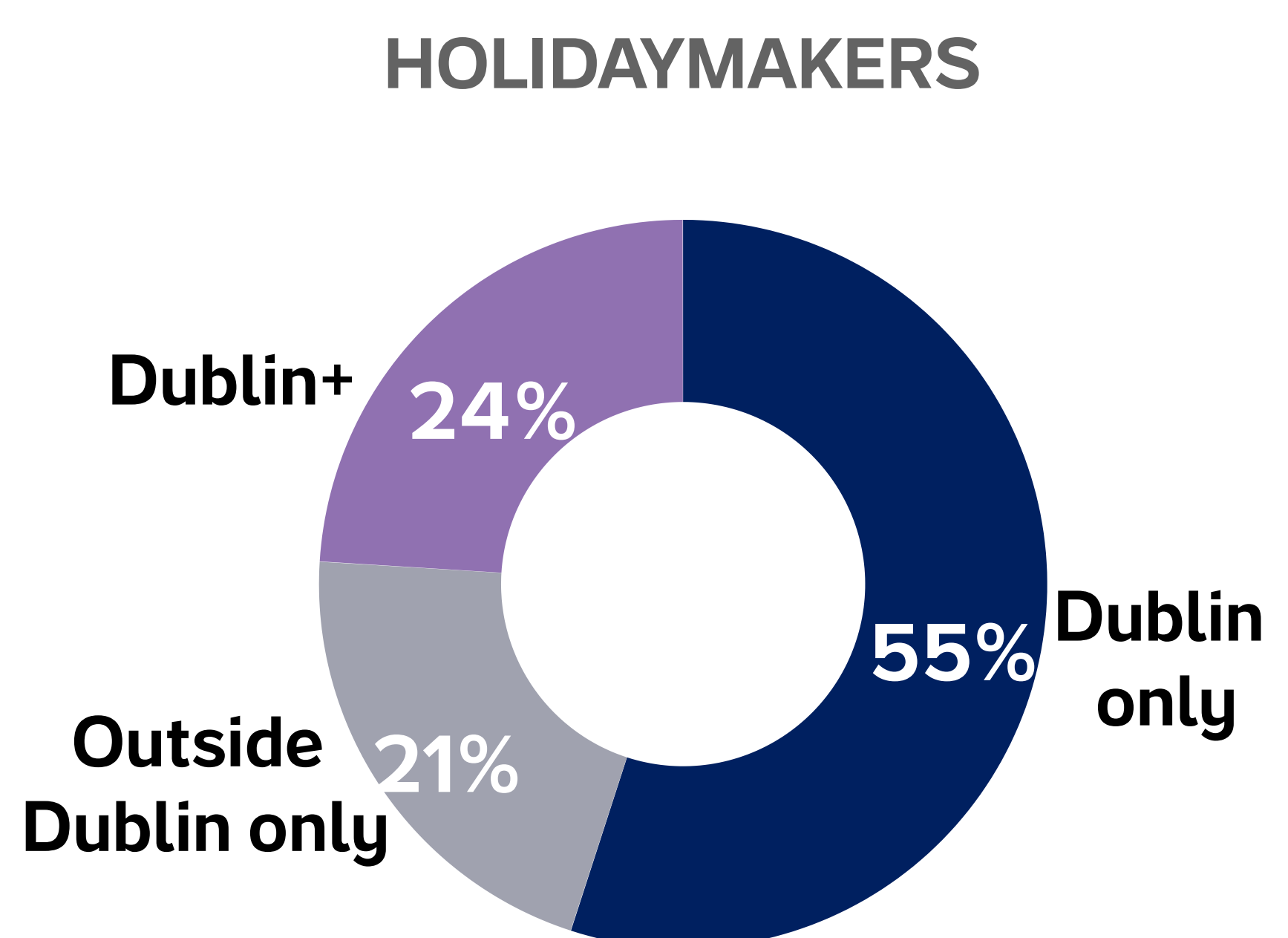
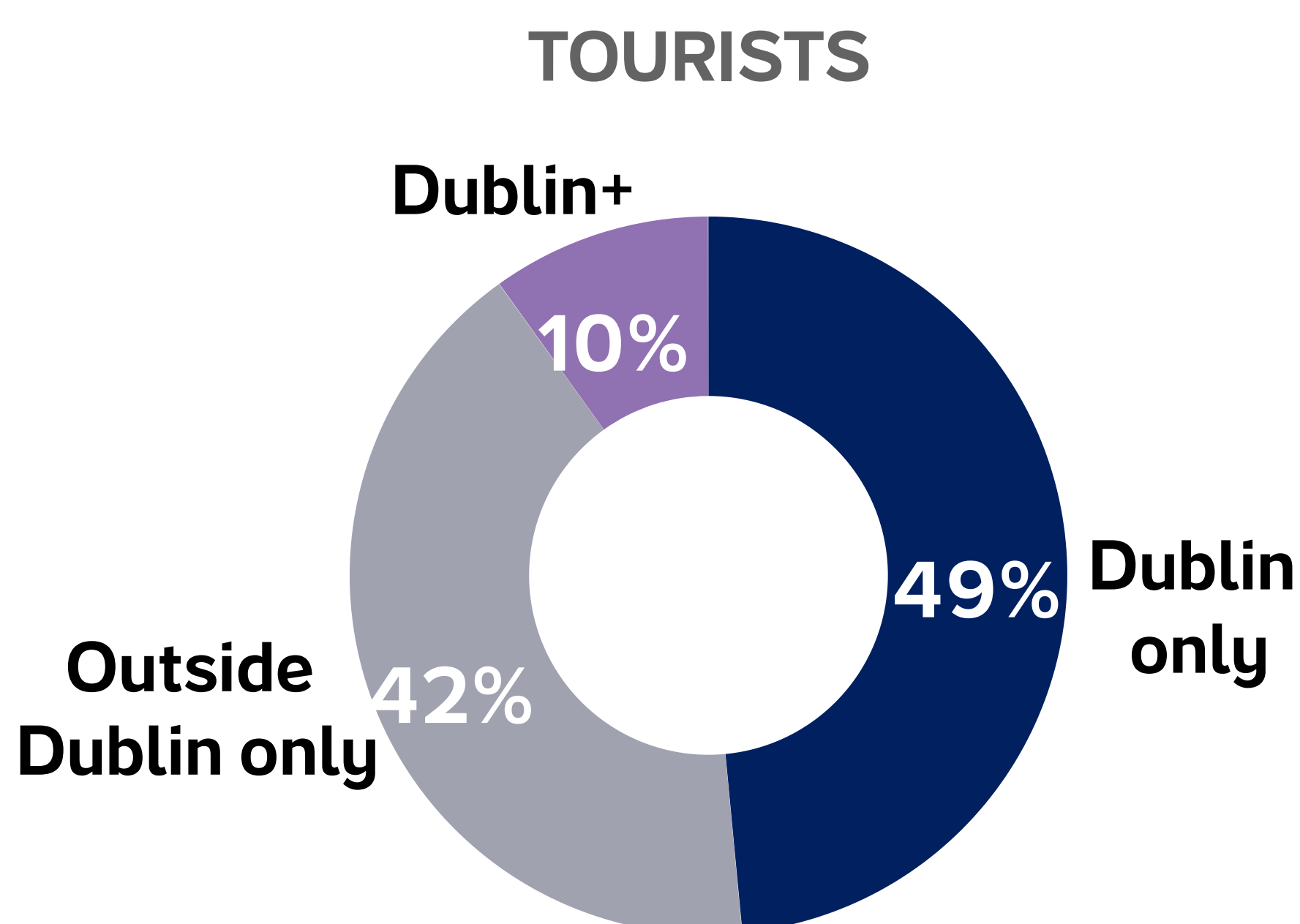
Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	South-West	West
#3	West	South-West



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

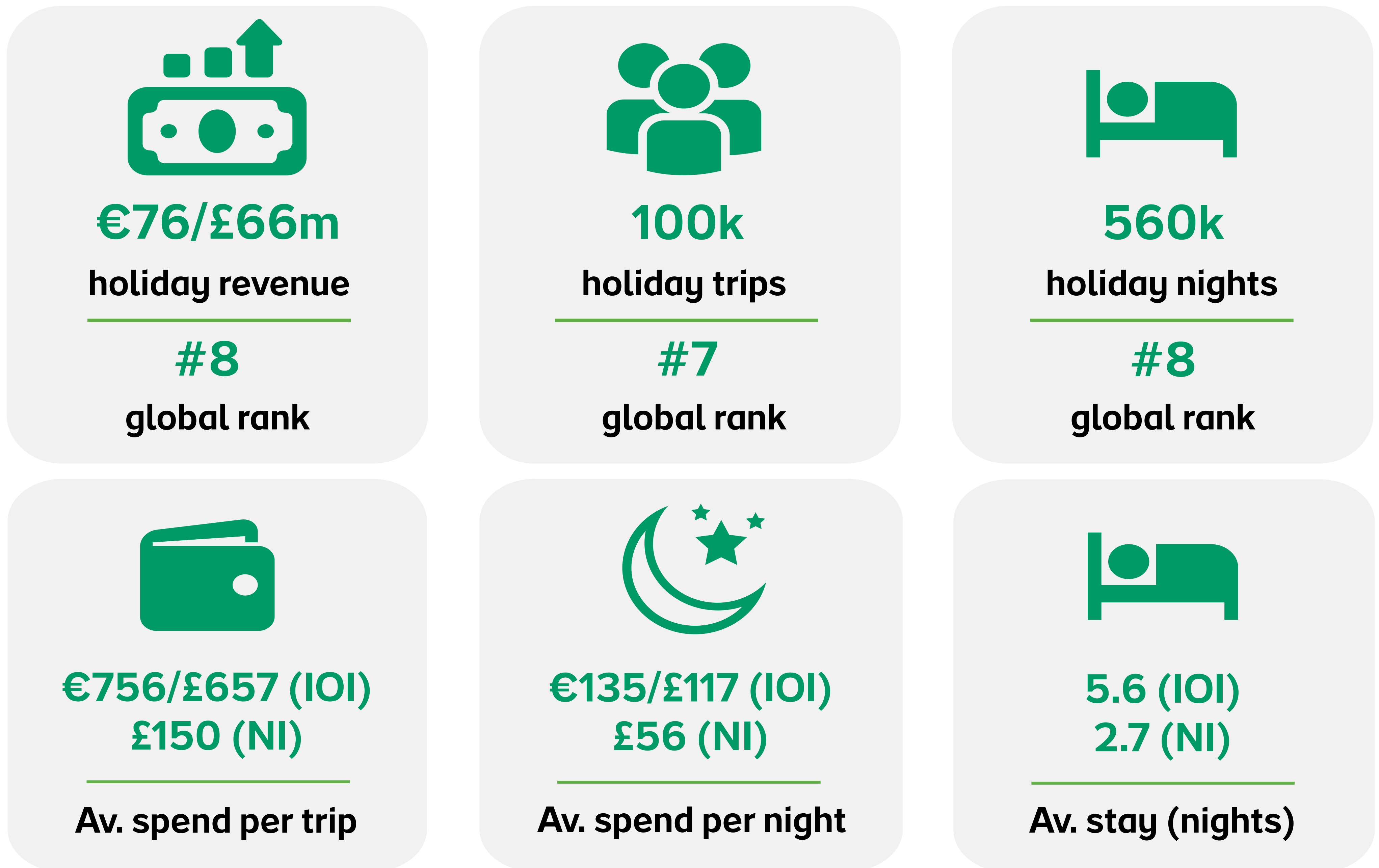
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of Italian tourists (59%) and holidaymakers (79%).



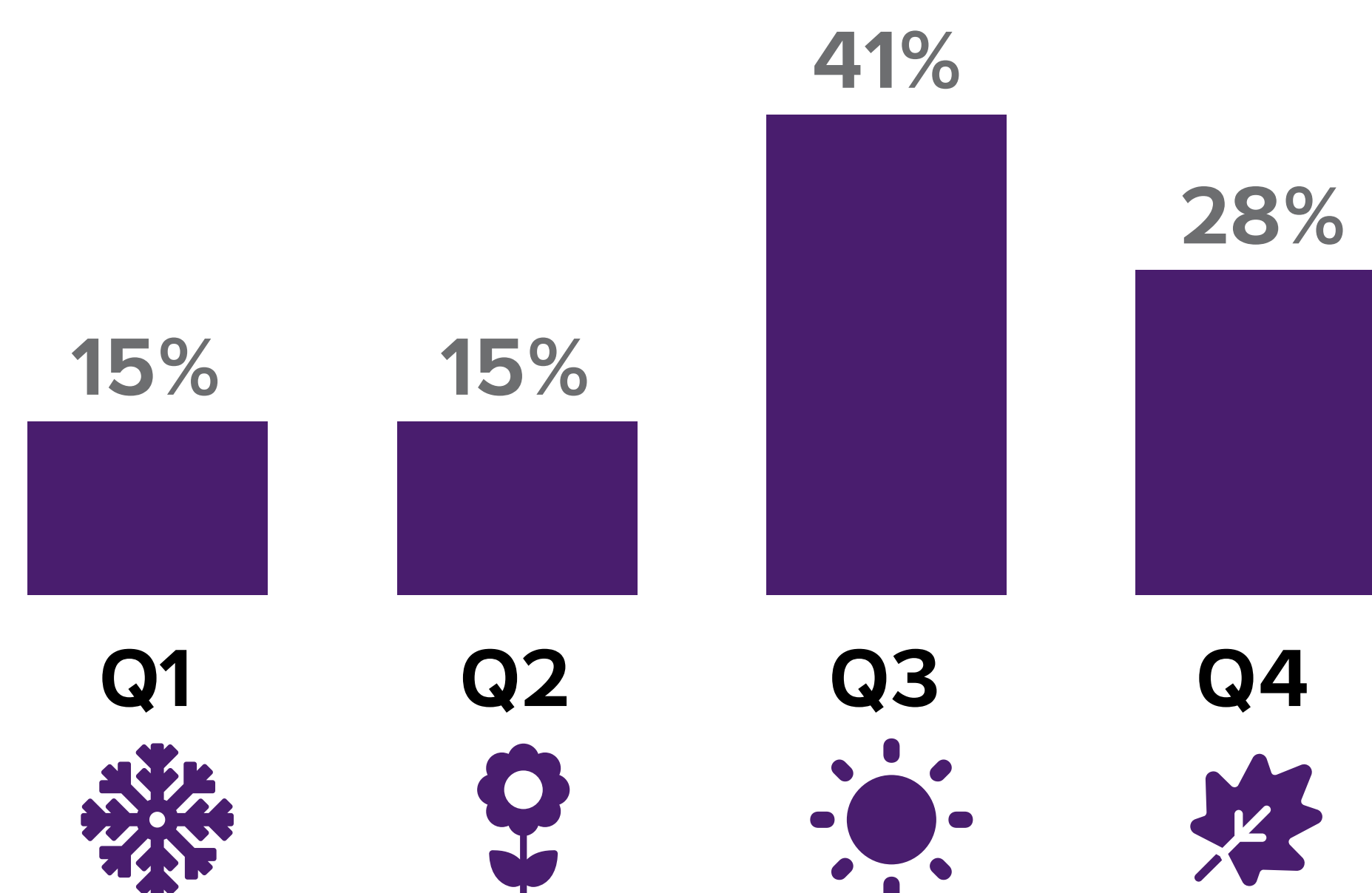
INBOUND HOLIDAYMAKERS

Italy was the island's seventh-largest source of holidaymakers and the eighth-largest source of holiday revenue and holiday nights. Italian holidaymakers stayed for an average of 5.6 nights on the island of Ireland. Those visiting Northern Ireland stayed an average of 2.7 nights.



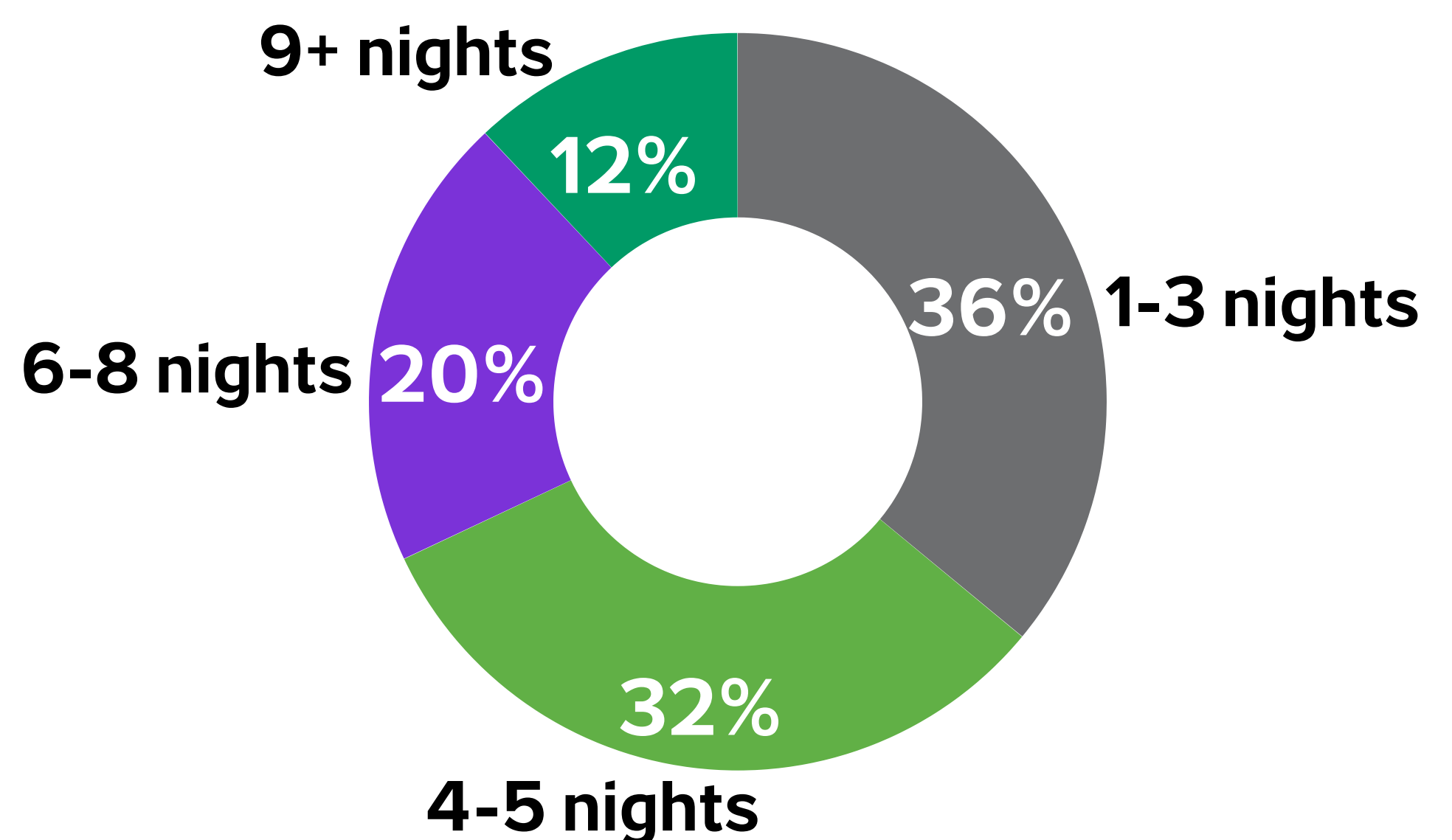
WHEN DID OUR HOLIDAYMAKERS VISIT?

Seven-in-ten (70%) visited the island of Ireland during the second half of the year.



HOW LONG DID OUR HOLIDAYMAKERS STAY?

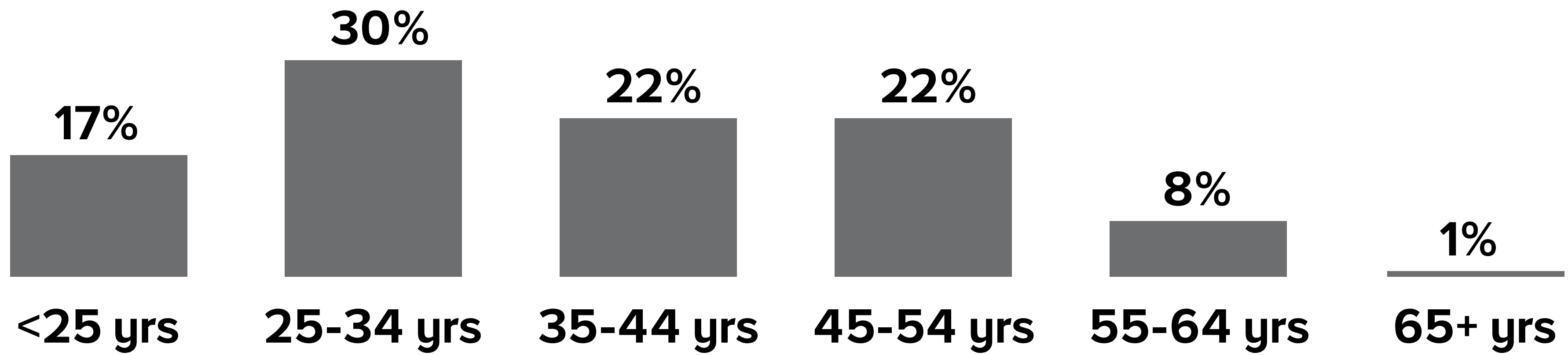
The majority (68%) of Italian holidaymakers stayed up to five nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT AGE WERE OUR HOLIDAYMAKERS?

Over half (52%) of Italian holidaymakers were 25 - 44 years old.

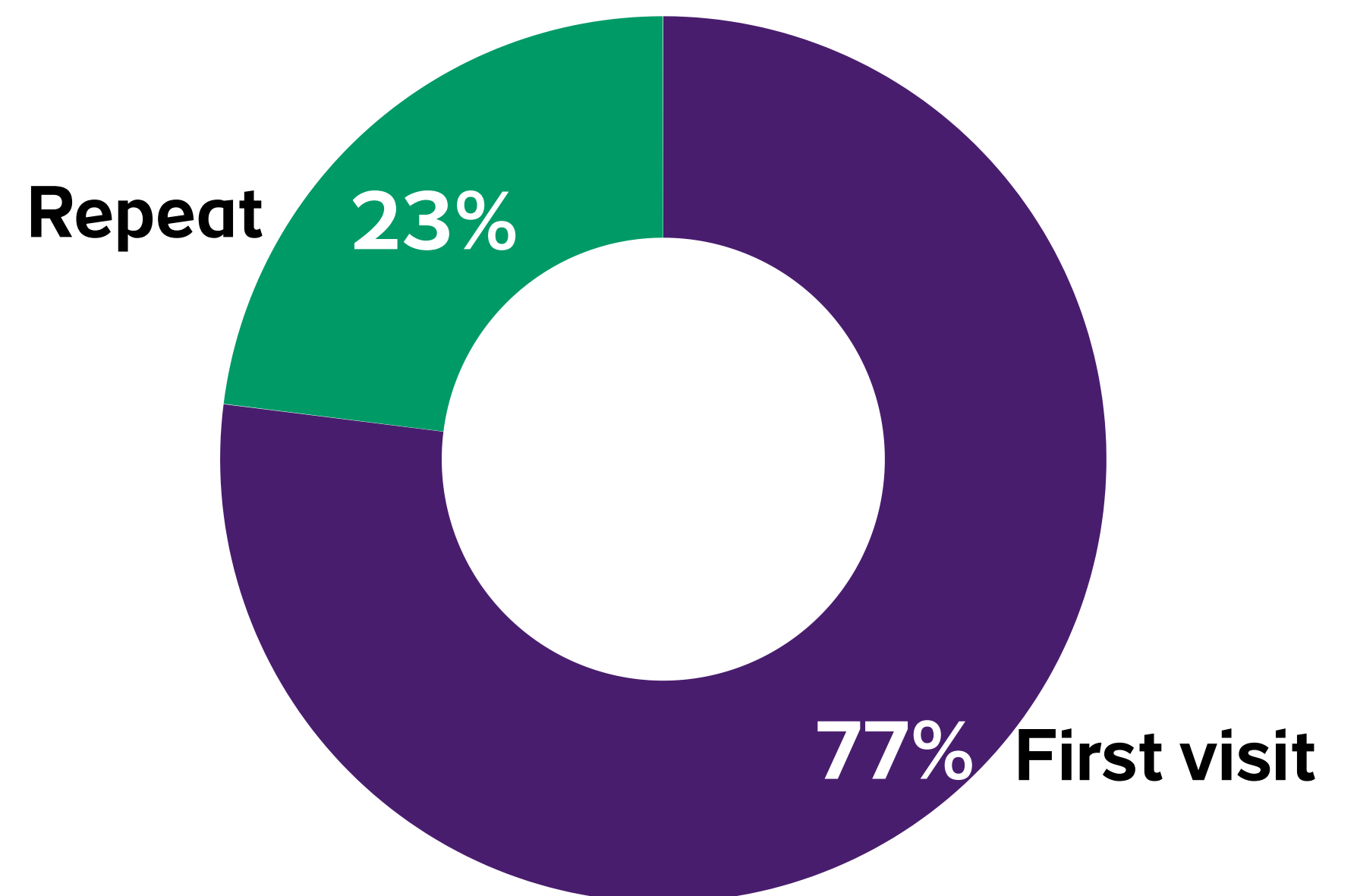
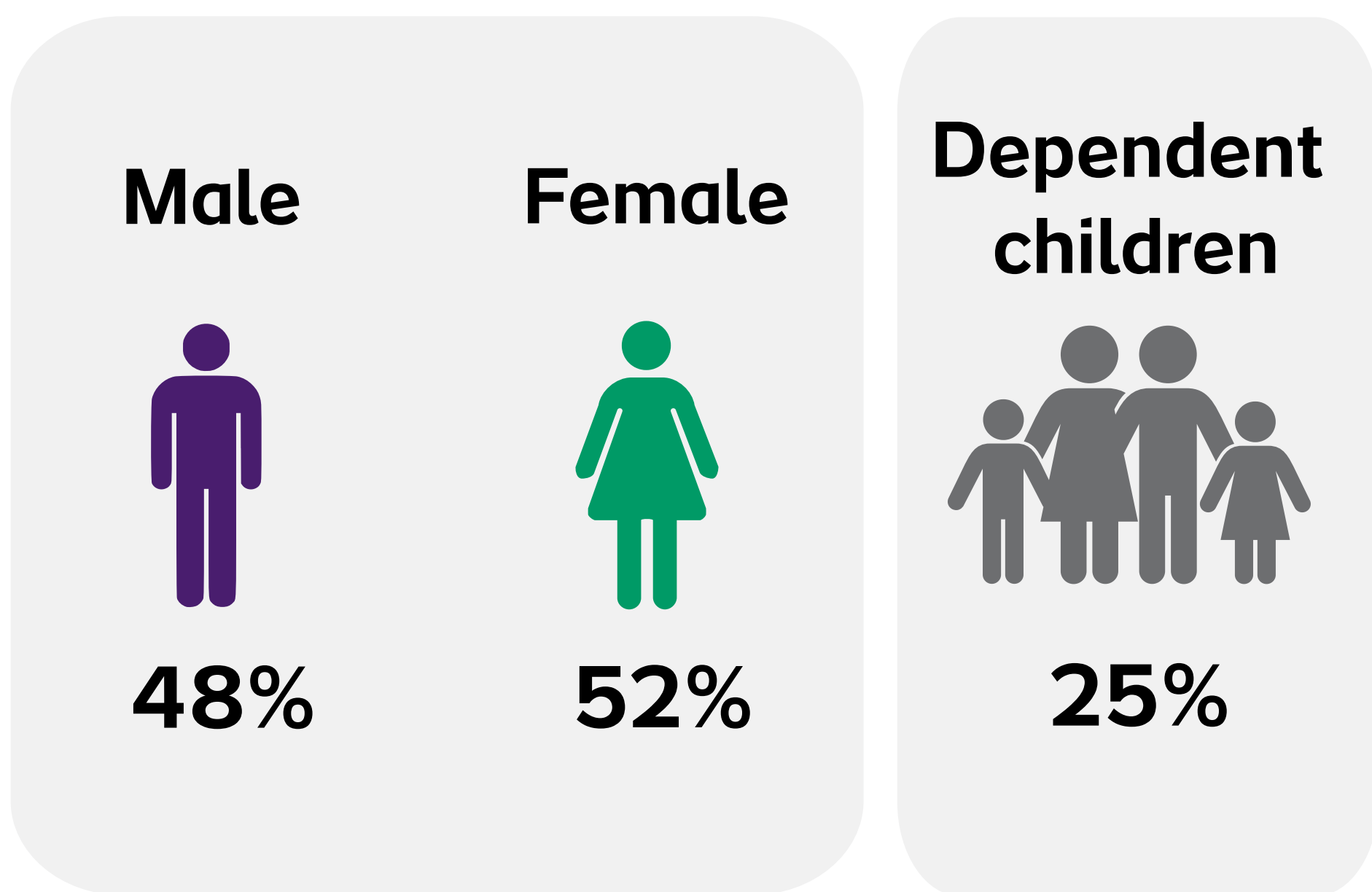


HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

A quarter (25%) of Italian holidaymakers had dependent children in the household (whether empty nesters or pre-children).

HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

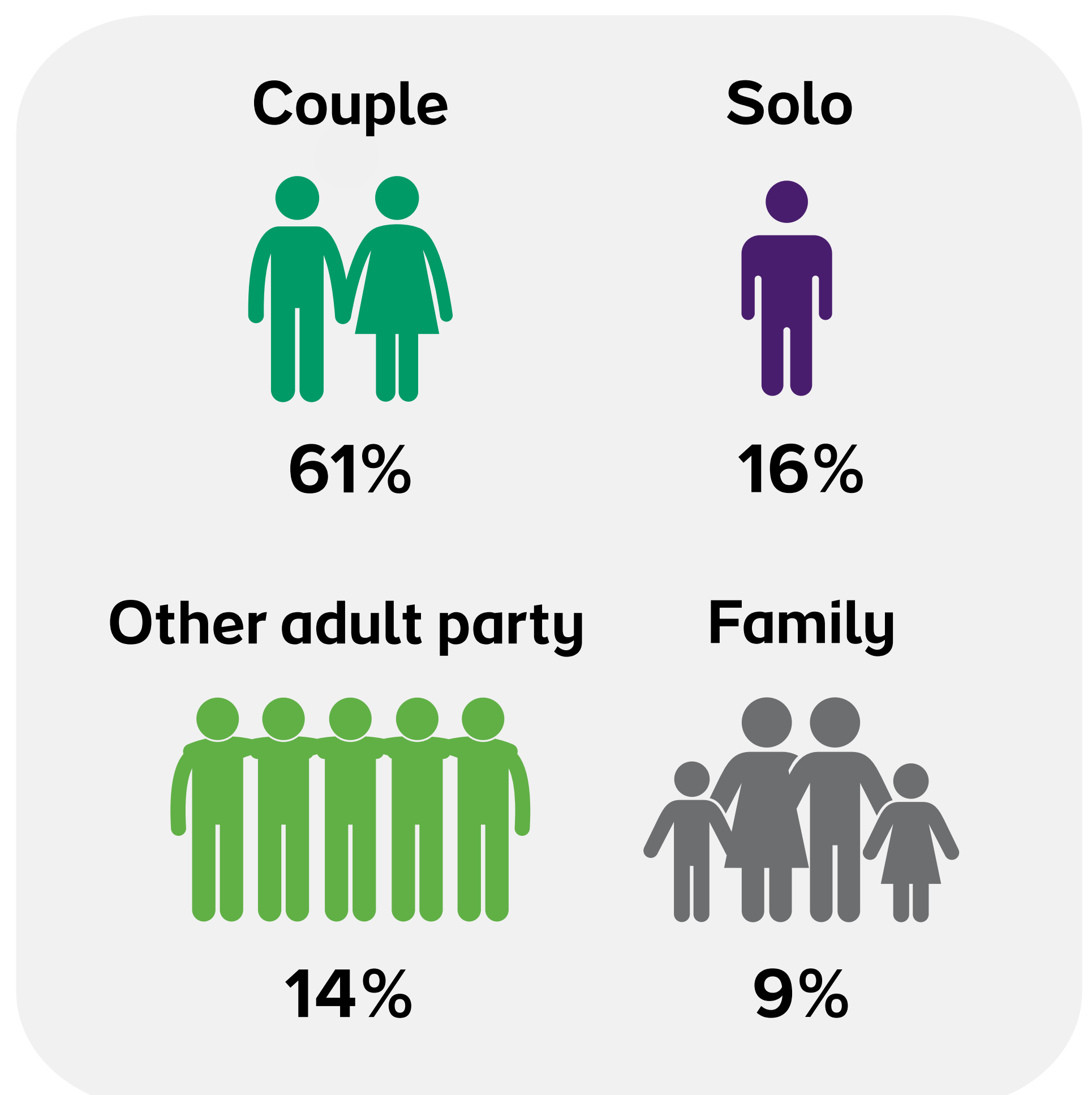
It was a first visit for over three-quarters (77%) of Italian holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

The majority (61%) of Italian holidaymakers travelled with their spouse/partner.

Around one-in-six (16%) visited on their own.



INBOUND HOLIDAYMAKERS

WHERE DID OUR HOLIDAYMAKERS STAY?

The majority (58%) of nights stayed by Italian holidaymakers were in hotels (36%) and B&Bs or guesthouses (22%).



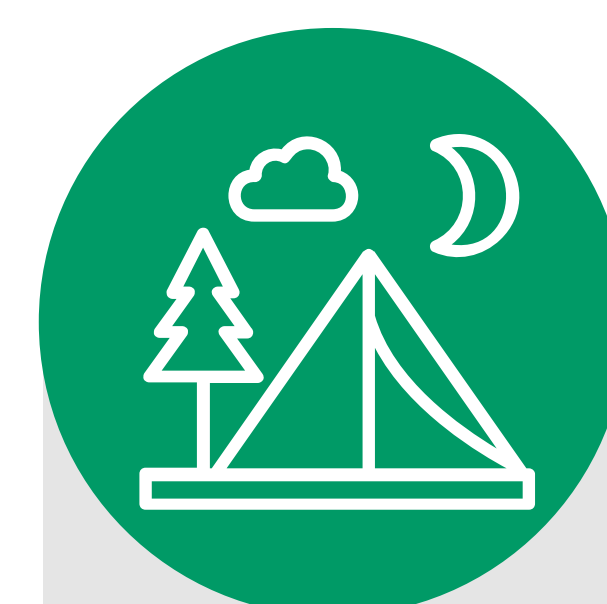
36%
of nights in
hotels



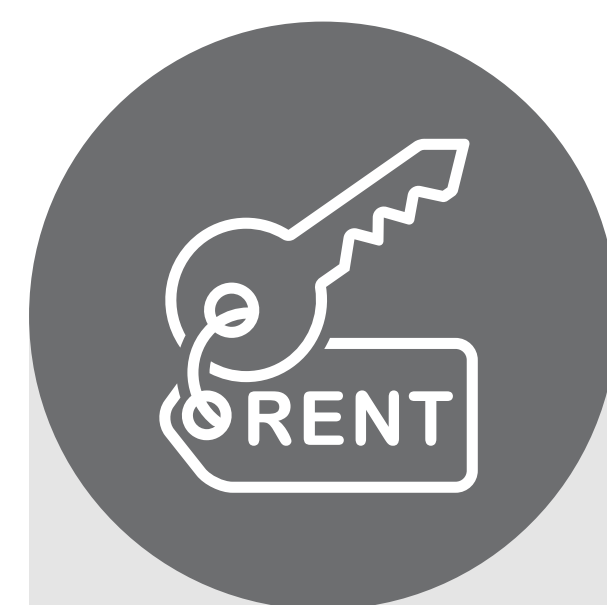
22%
of nights in
B&Bs or
guesthouses



10%
of nights
with friends
or family



8%
of nights
camping



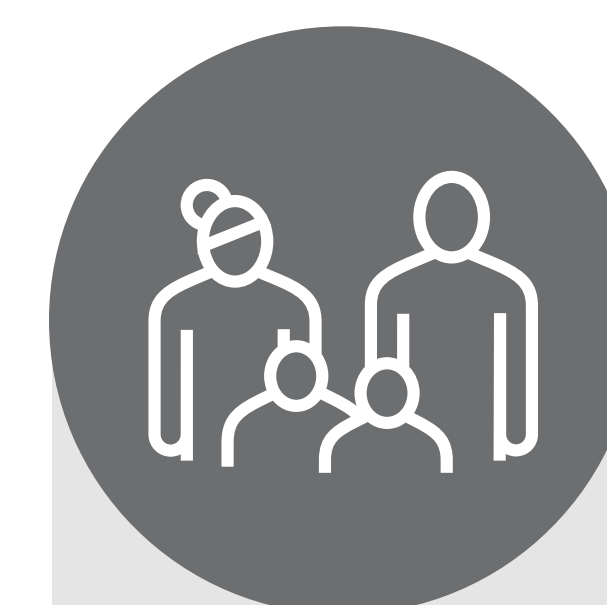
7%
of nights in
rented
accomm.



6%
of nights in
hostels



5%
of nights on
campus



5%
of nights
with host
family

HOW DID OUR HOLIDAYMAKERS TRAVEL & GET AROUND?

The majority (98%) of Italian holidaymakers travelled independently and almost a third (32%) used a car while on the island of Ireland.



98%
Travelled
independently



2%
Travelled as
part of a
package

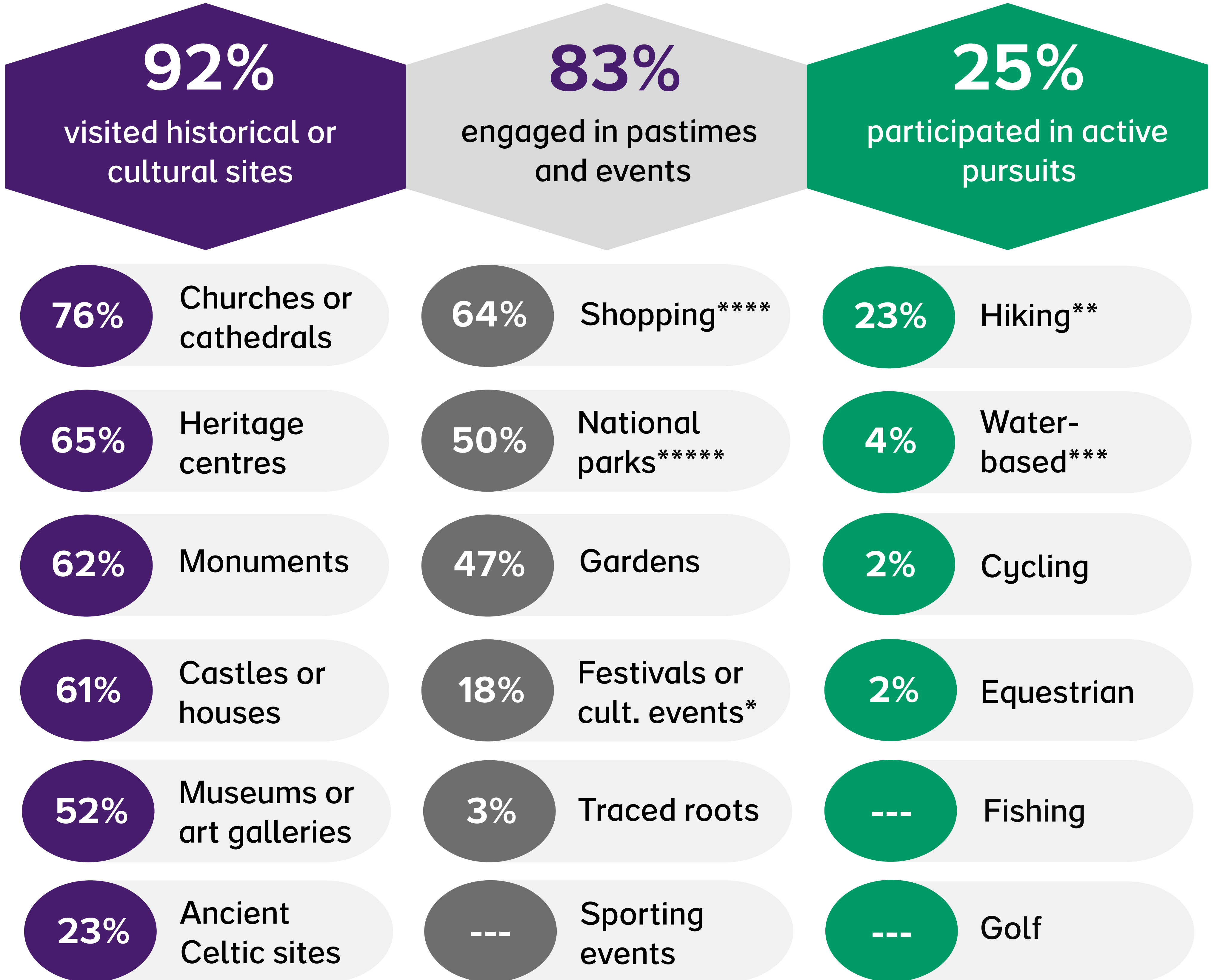


32%
Used a car
31% Rented
1% Borrowed
1% Brought

INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

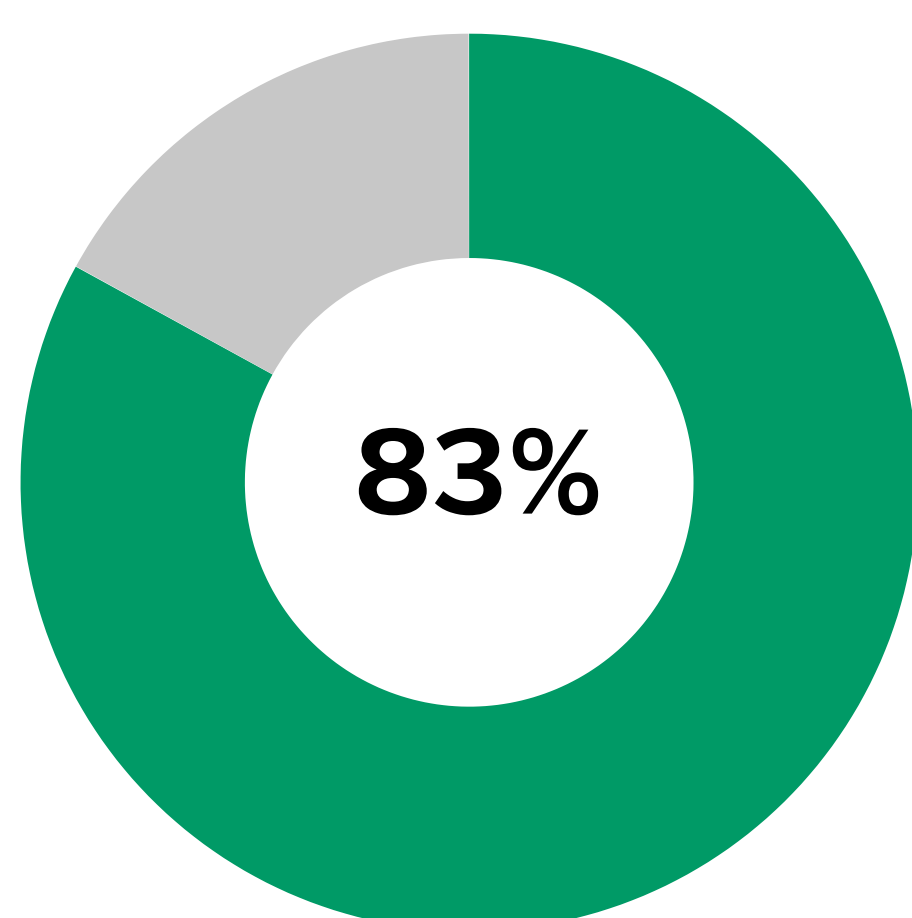
Italian holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



*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

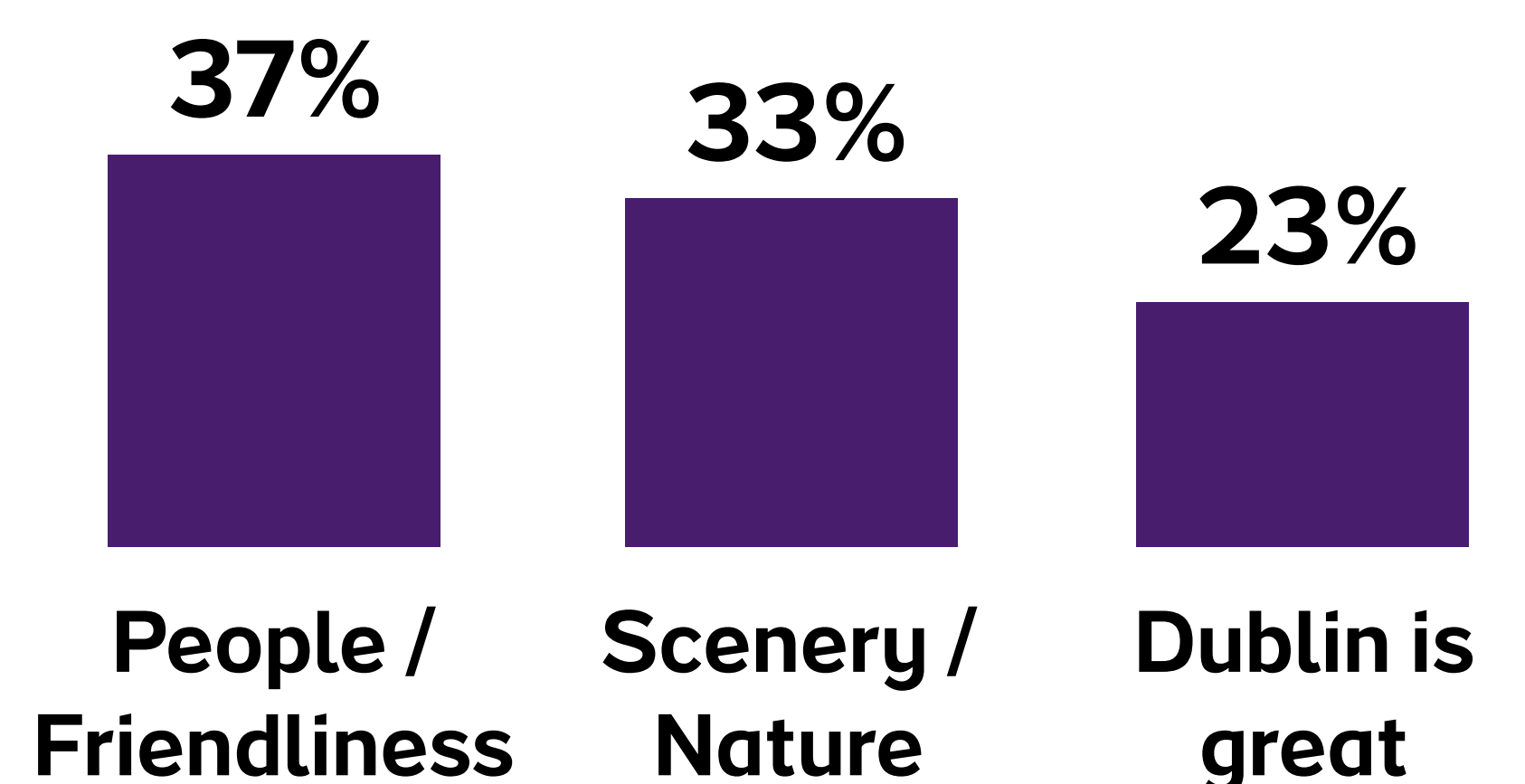
The majority (83%) of Italian holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (37%), the scenery and nature (33%) and that Dublin is great (31%).



**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

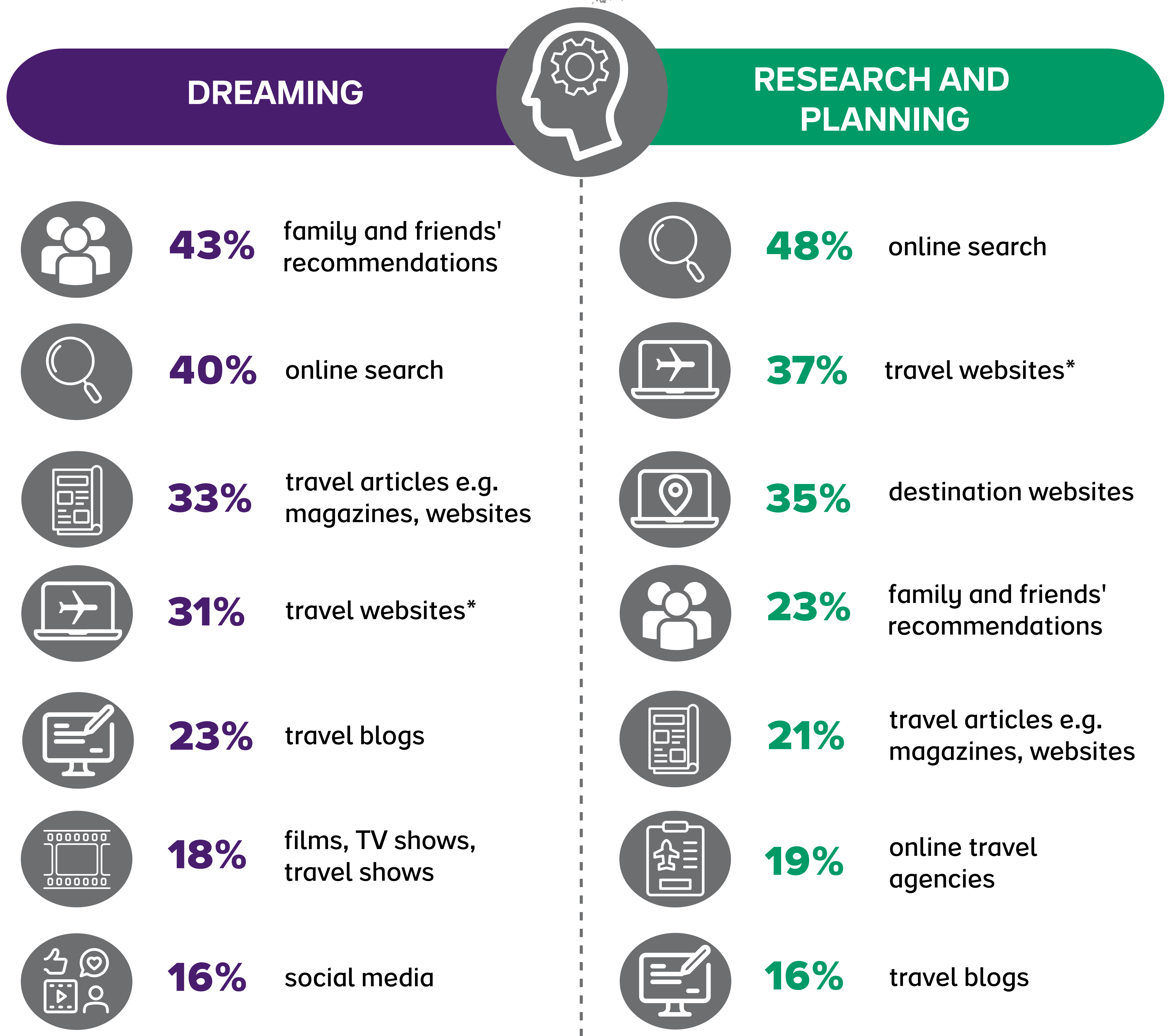
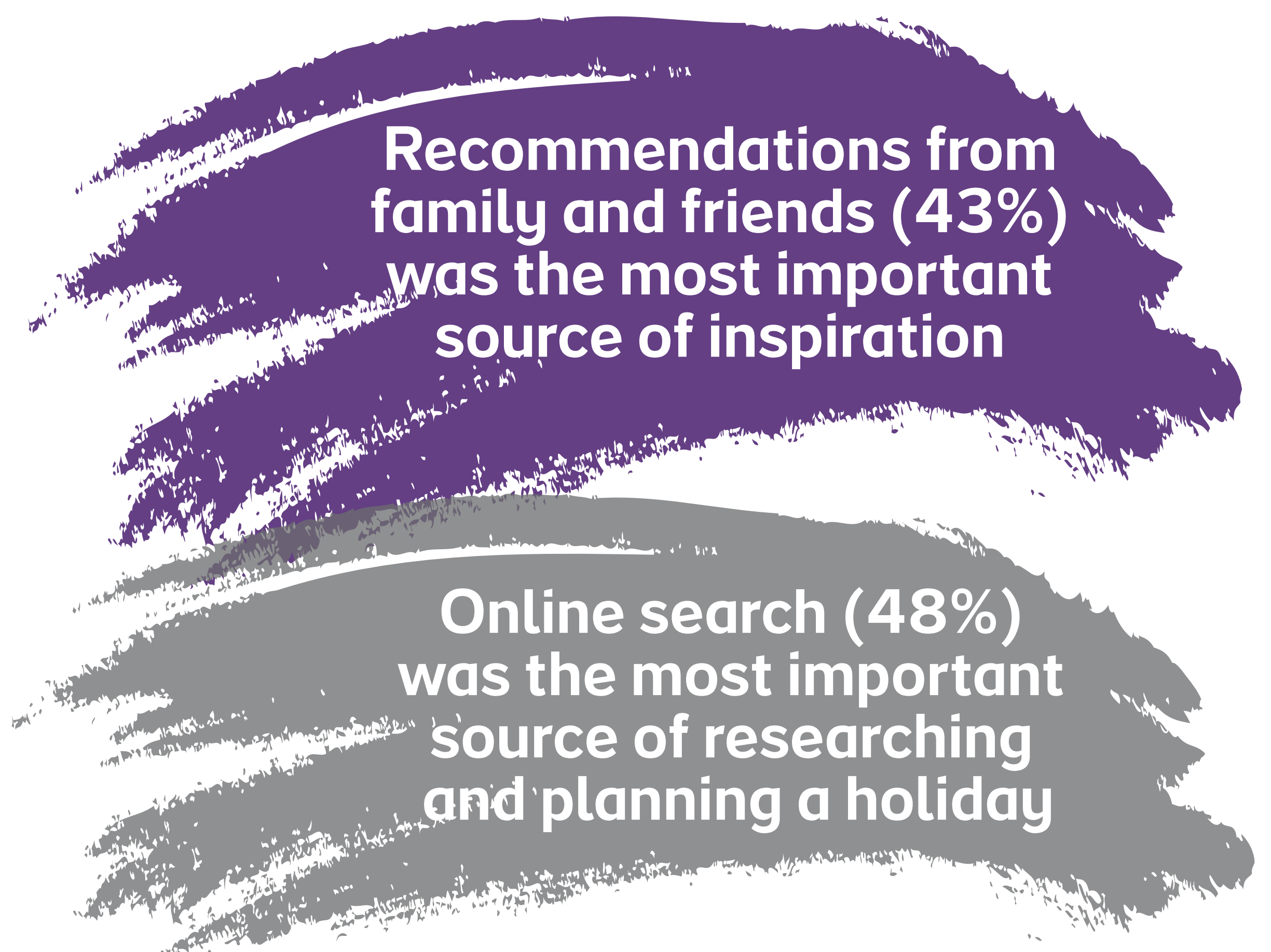


OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

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

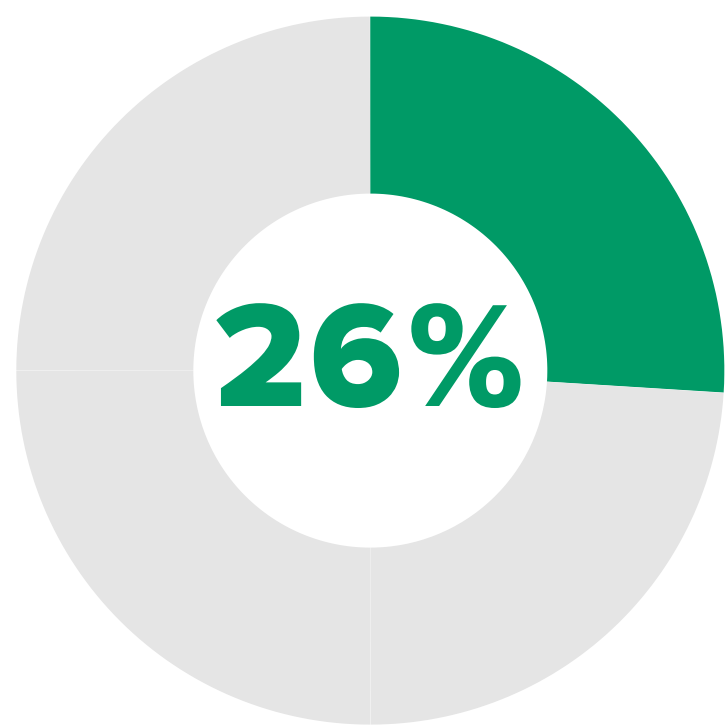
While social media, for example, is cited in its own right, it's often also a channel for the discovery of travel articles and recommendations.



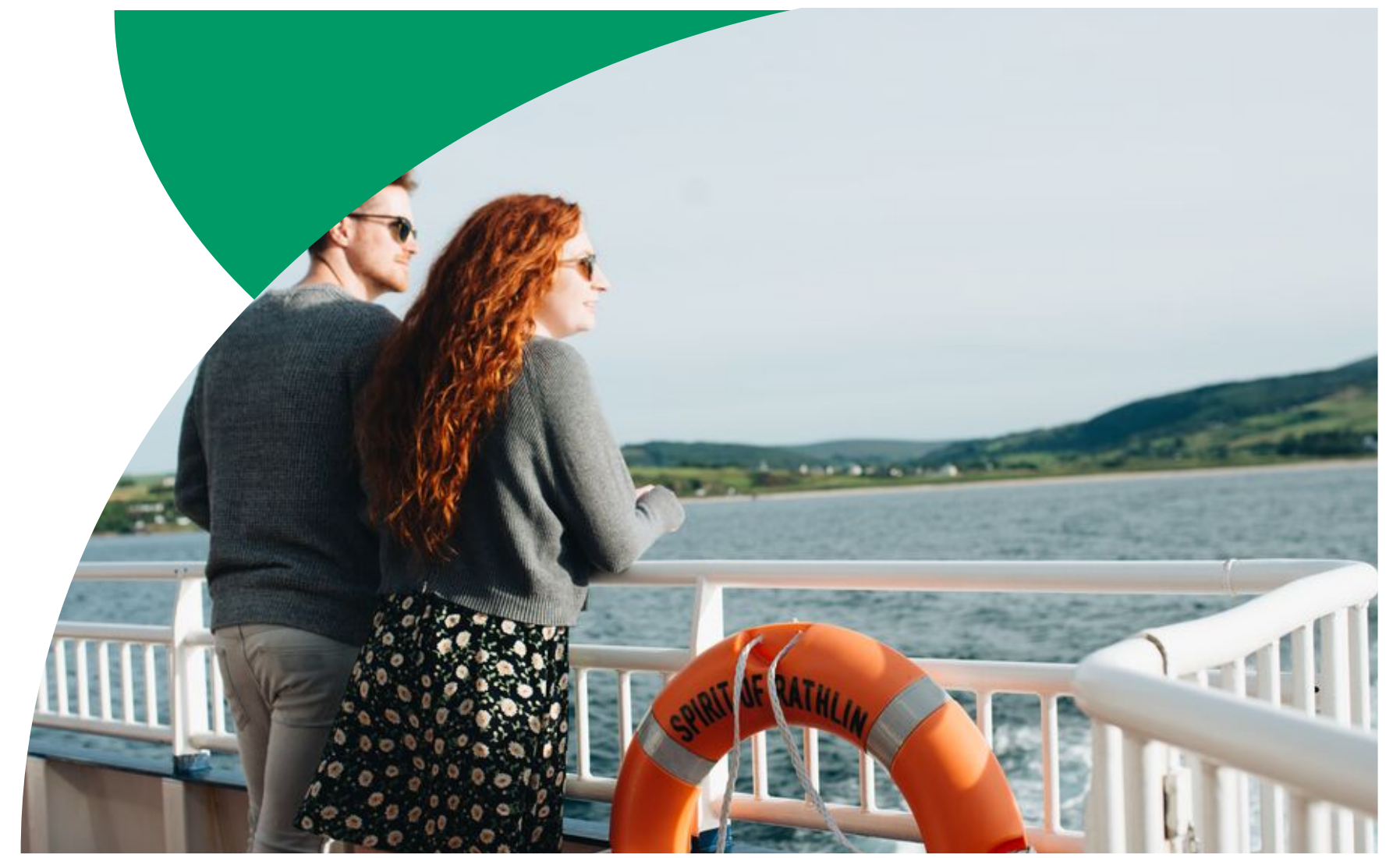
*Travel websites include company websites and booking platforms

ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



of Italian
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

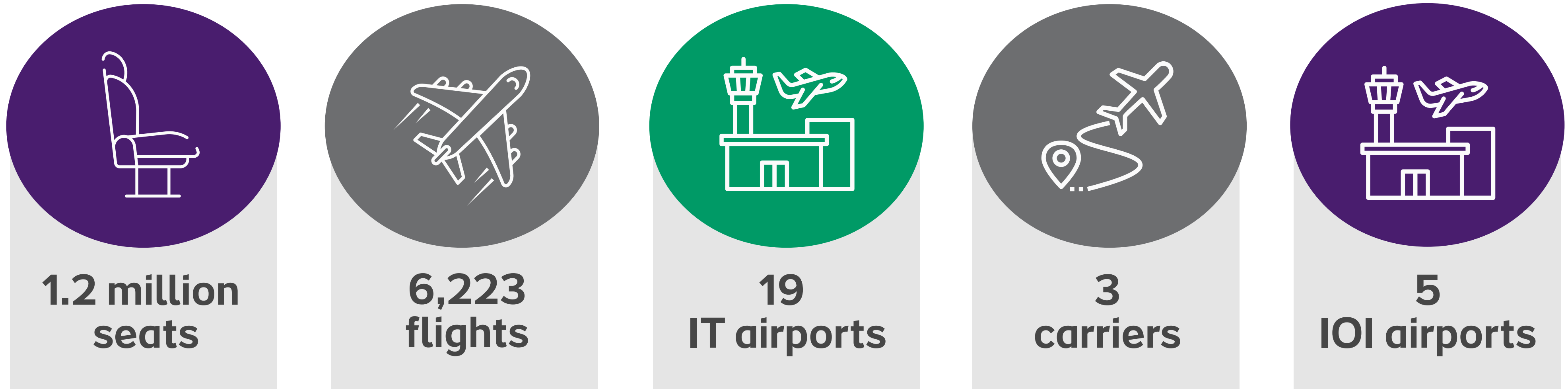
- 1  To feel connected to nature
- 2  To broaden and stimulate my mind
- 3  To feel the character of the place and people
- 4  To appreciate historical/modern architecture
- 5  To experience the vibrancy of the place and people
- 6  To experience living like a local
- 7  To enjoy authentic moments with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

Italy was the world's seventh-largest outbound market in 2023 and 85% of all outbound trips from Italy were to other parts of Europe.

ACCESS BY AIR

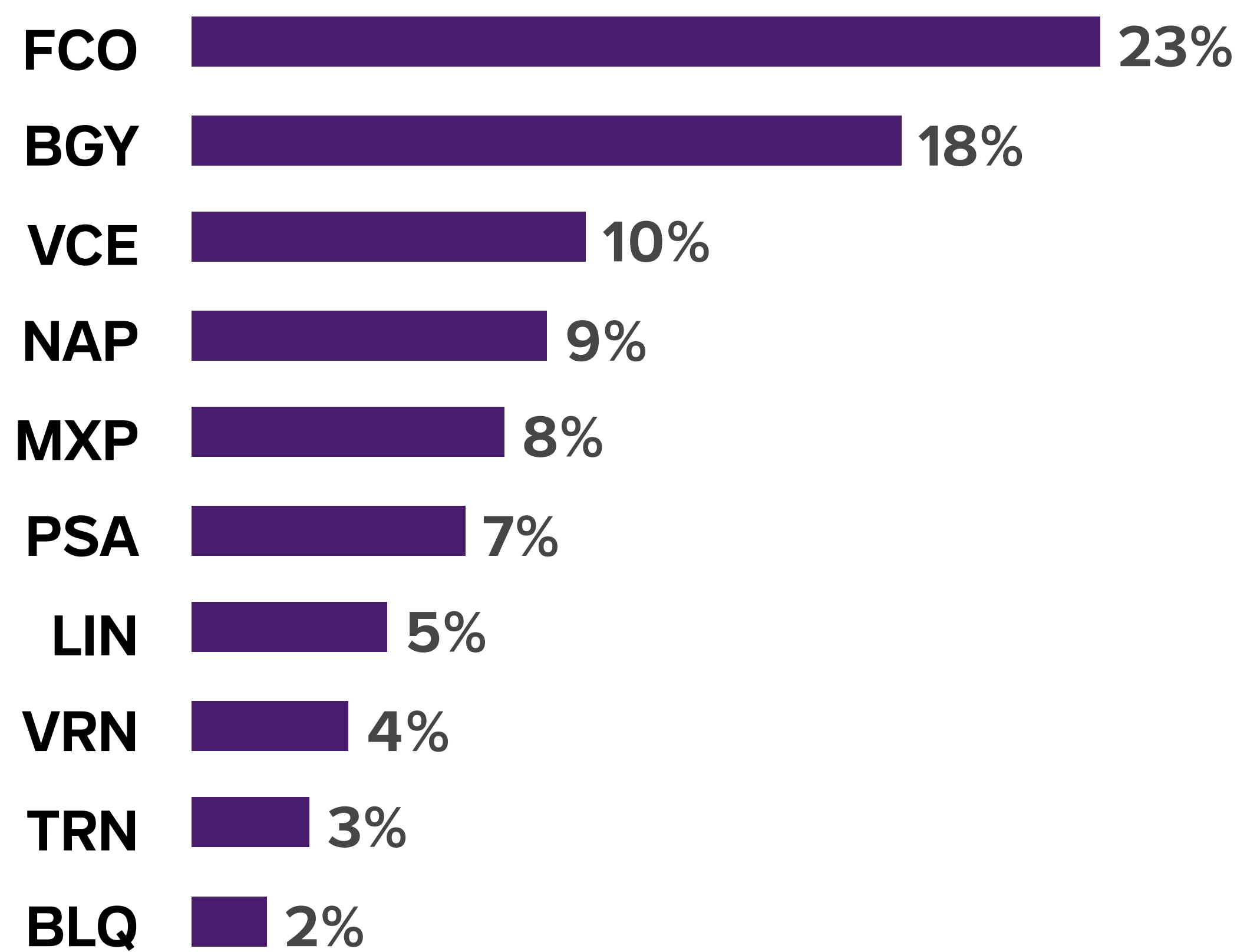
There were almost 1.2 million direct one-way air seats available on over 6,000 flights from Italy to the island of Ireland in 2023. There were 19 gateways from Italy to airports on the island of Ireland.



WHERE CAN OUR TOURISTS FLY FROM?

The top ten Italian airports accounted for the majority (88%) of seats in 2023. Rome (Fiumicino), Milan (Bergamo), and Venice (Marco Polo) accounted for half (50%) of seats.

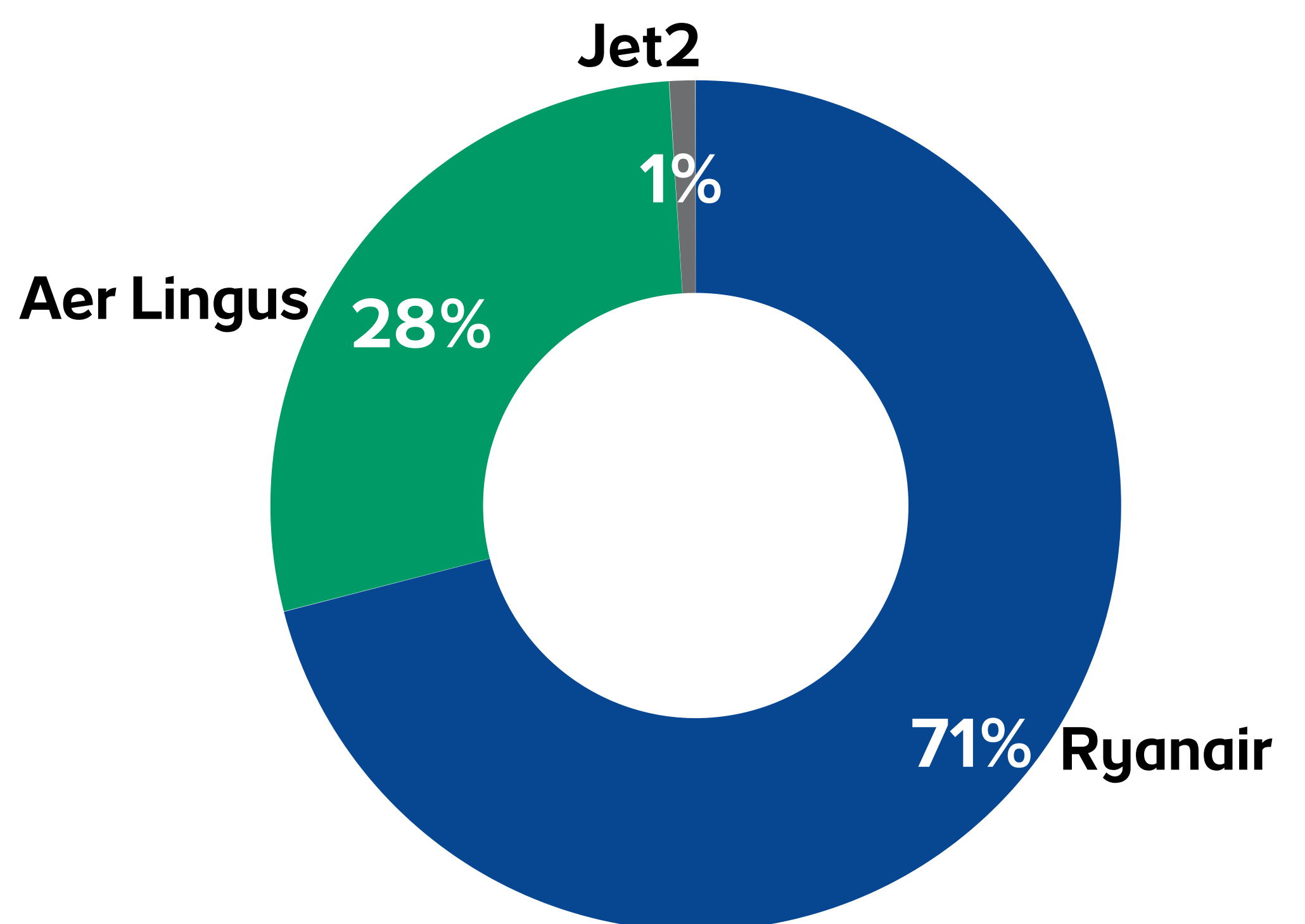
Share of seats by airport (Top 10)



WHO CAN OUR TOURISTS FLY WITH?

Three carriers operated between Italy and the island of Ireland. In 2023, Ryanair was responsible for delivering the majority (71%) of seats to the island of Ireland.

Share of seats by carrier



FCO: Rome Fiumicino, BGY: Milan Bergamo/Orio al Serio, VCE: Venice Marco Polo, NAP: Naples Capodichino, MXP: Milan Malpensa, PSA: Pisa, LIN: Milan Linate, VRN: Verona Villafranca Airport, TRN: Turin Caselle, BLQ: Bologna Guglielmo Marconi.