

# AUSTRALIA & NEW ZEALAND MARKET PROFILE 2024

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## INBOUND TOURISTS

The island of Ireland welcomed around 156,000 tourists from Australia and New Zealand who spent €217/£189 million and stayed 2.4 million nights. Australia and New Zealand combined was the island's the sixth-largest source of overseas nights, eighth-largest source of overseas revenue and tenth-largest source of overseas trips.

revenue €217/£189m, global rank: #8

trips 156k, global rank: #10

nights 2.4m, global rank: #6

## WHERE DID OUR TOURISTS COME FROM?

Almost 19,000 (12%) of the 156,000 tourists from ANZ were from New Zealand. Of the 137,000 Australian tourists, half (49%) of tourists came from New South Wales.

- New South Wales 30%
- Western Australia 21%
- Queensland 21%
- Victoria 20%
- Southern Australia 6%
- Other Australia 3%

## WHERE DID OUR TOURISTS VISIT?

ROI tourists 138 thousand

NI tourists 47 Thousand

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

## WHEN DID OUR TOURISTS VISIT?

Q3 (July - September) was the most popular time for tourists from Australia and New Zealand to visit the island.

Tourist trips Qtr 1	15%
Tourist trips Qtr 2	28%
Tourist trips Qtr 3	39%
Tourist trips Qtr 4	18%

Source: CSO, NISRA, Fáilte Ireland's Survey of Overseas Travellers

## WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Half (49%) of all revenue generated from tourists from Australia and New Zealand came from holidaymakers, this segment represented 46% of all trips. Half (49%) of all tourists were visiting friends and/or relatives (VFR), accounting for the second largest share (41%) of revenue.

PoV breakdown	Rev € million	Rev £ million	Rev share	Trips thousand	Trips share	Nights thousand	Nights share
Holiday	106	93	49%	72	46%	750	32%
VFR	89	77	41%	76	49%	1,447	61%
Business	6	5	3%	4	2%	34	1%
Other	16	14	7%	10	6%	144	6%

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

On average, ANZ tourists spent €1,393/£1,212 per trip or €91/£79 per night and stayed 15.2 nights on the island of Ireland.

### **On the island of Ireland:**

Average spend per trip €1,393 / £1,212

Average spend per night €91 / £79

Average stay 15.2 nights

### **In Northern Ireland:**

Average spend per trip £498 and per night £64

Average stay 7.8 nights

## HOW DID OUR TOURISTS SPEND THEIR MONEY?

Spent on food and drink accounted for two-fifths (38%) of all spend.

Food & drink	38%
Accommodation	31%
Shopping	12%
Transport	11%
Entertainment	8%
Misc	1%

## HOW LONG DID OUR TOURISTS STAY?

One-fifth (21%) stayed nine or more nights on the island of Ireland.

### **Length of stay**

1-3 nights	18%
4-5 nights	24%
6-8 nights	37%
9+ nights	21%

# INBOUND TOURISTS AND HOLIDAYMAKERS

## WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin and the West emerged as the most favoured destinations among ANZ tourists and holidaymakers. Northern Ireland ranked third in popularity for tourists, while the West was third place among holidaymakers.

Holidaymakers from ANZ were more likely to overnight on both sides of the border, with a quarter (25%) doing so, compared to a fifth (19%) of tourists from the region.

## WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

% visited areas	Tourists   Holidaymakers
Northern Ireland	30% of Tourists   Holidaymakers 35%
Border	8% of Tourists   Holidaymakers 10%
Dublin	58% of Tourists   Holidaymakers 75%
Mid West	13% of Tourists   Holidaymakers 17%
South East	14% of Tourists   Holidaymakers 17%
South West	27% of Tourists   Holidaymakers 39%
West	32% of Tourists   Holidaymakers 42%
Mid-East & Midlands	11% of Tourists   Holidaymakers 9%

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<b>Top 3 regions:</b>	<b>Tourists</b>	<b>Holidaymakers</b>
1	Dublin	Dublin
2	West	West
3	Northern Ireland	South West

## WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of ANZ tourists (58%) and holidaymakers (74%).

	Tourists	Holidaymakers
Dublin only	23%	25%
Outside Dublin only	42%	26%
DUB+	34%	50%

### 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

## INBOUND HOLIDAYMAKERS

ANZ was the island of Ireland's sixth-largest source of holiday nights, seventh-largest source of holiday revenue, and the tenth-largest source of holidaymakers.

Holidaymakers from the region stayed for an average of 10.4 nights on the island of Ireland. Those visiting Northern Ireland stayed for an average of 3.5 nights.

- €106/£933m holiday revenue, global rank #7
- 72k holiday trips, global rank #10
- 750K holiday nights, global rank #6
- €1,477/£1,285 (IOI) Av. spend per trip, £368 in NI
- €142/£123 (IOI) Av. spend per night, £105 in NI
- Av. stay (nights) 10.4 on the island of Ireland, 3.5 in NI

## WHEN DID OUR HOLIDAYMAKERS VISIT?

Three-quarters (75%) of ANZ holidaymakers visited the island of Ireland during Q2 and Q3 (April to September).

Holiday trips Qtr 1	9%
Holiday trips Qtr 2	33%
Holiday trips Qtr 3	42%
Holiday trips Qtr 4	15%

## HOW LONG DID OUR HOLIDAYMAKERS STAY?

A third (32%) of ANZ holidaymakers stayed nine or more nights on the island of Ireland.

### Hol Length of stay

1-3 nights	22%
4-5 nights	16%
6-8 nights	30%
9+ nights	32%

## WHAT AGE WERE OUR HOLIDAYMAKERS?

Half (52%) of ANZ holidaymakers were under 35 years old.

### Holiday age (party)

< 25 years	18%
25-34 years	34%
35-44 years	9%
45-54 years	11%
55-64 years	20%
65 or older	8%

## HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

Around one-tenth (11%) of ANZ holidaymakers had dependent children in the household.

Dependent Children	11%
Party composition - gender	
Male	40%
Female	60%

## HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

It was a first visit for around seven-in-ten (72%) ANZ holidaymakers.

First	72%
Repeat	26%
Born here	2%

## WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Almost half (47%) of Australian holidaymakers from the region travelled with their spouse/partner. One-fifth (21%) visited alone.

Travel party

Couple	47%
Solo	21%
Other adult party	18%
Family	15%

## WHERE DID OUR HOLIDAYMAKERS STAY?

More than a third (35%) of nights by ANZ holidaymakers were spent in a hotel. Around one in five nights were staying with family and friends, and a further one in five nights were spent in B&Bs or guesthouses.

Accommodation type Nights

Hotel	35%
Friends & family	22%
Guesthouse / B&B	20%
Hostels	9%
Rented Accommodation	9%
Holiday home	3%

## HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

The majority (92%) of holidaymakers from Australia and New Zealand travelled independently and half (51%) used a car while on the island of Ireland.

Independent travel	92%
Package	8%
Car used	51%
<i>Car hire</i>	44%
<i>Car borrowed/other</i>	5%

## WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

Australian 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 97%**

Historic Houses or Castles 79%

Visitor/heritage centre 78%

Churches or Cathedrals 72%

Monuments 62%

Museums or art galleries 55%

Ancient Celtic Sites 34%

### **Any pastimes & events 94%**

Visited national parks and forests 70%

Shopping excluding food, drink & souvenirs 61%

Visited gardens 58%

Attended a festival or cultural event or concert 19%

Traced roots or genealogy 4%

Attended an organised sporting event 3%

### **Any active pursuits 44%**

Hiking / Cross Country Walking 41%

Water based activities (excluding fishing and swimming) 5%

Cycling 4%

Source: Fáilte Ireland's Survey of Overseas Travellers

## LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS

The majority (83%) of holidaymakers from Australia and New Zealand would recommend a holiday in Ireland to others. The main reasons given are the friendly people (61%), the scenery and nature (47%) and history (23%).

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

The People/Friendliness 61%

Scenery/Beauty of countryside/Nature 47%

Generally good/Great place to visit 23%

# OUTBOUND HOLIDAYMAKERS

## SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from the US use multiple sources of inspiration when choosing a holiday destination, including recommendations from family and friends, social media, travel websites, online searches and film and TV shows. 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.

- 1-in-2 cited getting inspired by recommendations from family and friends.
- More than half of holidaymakers (56%) use general online search to plan their trip.

### Inspiration

Recommendations from family and friends 45%

General online search (e.g., Google) 37%

Travel websites and online travel agencies (company websites, booking platforms)  
31%

Social media 30%

TV (films & TV shows, travel shows) 28%

Travel articles/ blogs/ online travel forums/ newspaper/ magazines 24%  
Destination website 23%

### Planning

General online search (e.g., Google) 56%

Travel websites and online travel agencies (company websites, booking platforms)  
47%

Destination website 40%

Recommendations from family and friends 30%

Travel articles/ blogs/ online travel forums/ newspaper/ magazines 26%  
Social media 25%  
Guidebooks 13%

\*Travel websites include company websites and booking platforms

# 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

Australia was the world's 19<sup>th</sup> largest outbound market in 2024 and 33% of all outbound trips from Australia were to Europe. New Zealand was 57<sup>th</sup> largest outbound market and only 18% of trips were to Europe.