

# AUSTRALIA

## MARKET PROFILE 2023



### INBOUND TOURISTS

The island of Ireland welcomed around 142,000 Australian tourists who spent €210/£183 million and stayed 2.1 million nights. Australia was the island's seventh-largest source of overseas revenue and the sixth-largest source of overseas nights.



### WHERE DID OUR TOURISTS COME FROM?

Over half (54%) of Australian tourists came from Victoria (29%) and New South Wales (26%).



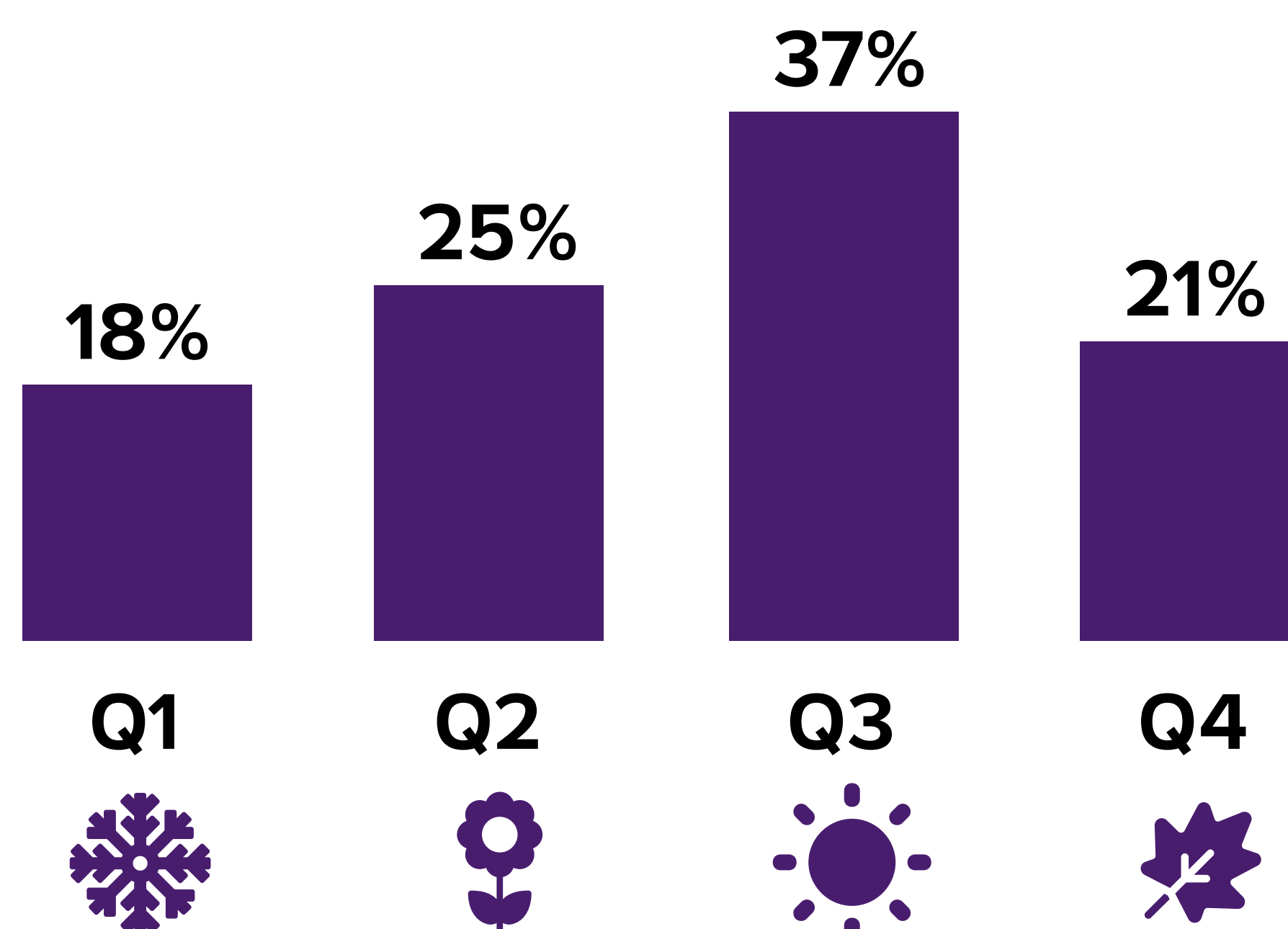
### WHERE DID OUR TOURISTS VISIT?



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

### WHEN DID OUR TOURISTS VISIT?





Q3 (July - September) was the most popular time for Australian tourists to visit the island.



# INBOUND TOURISTS

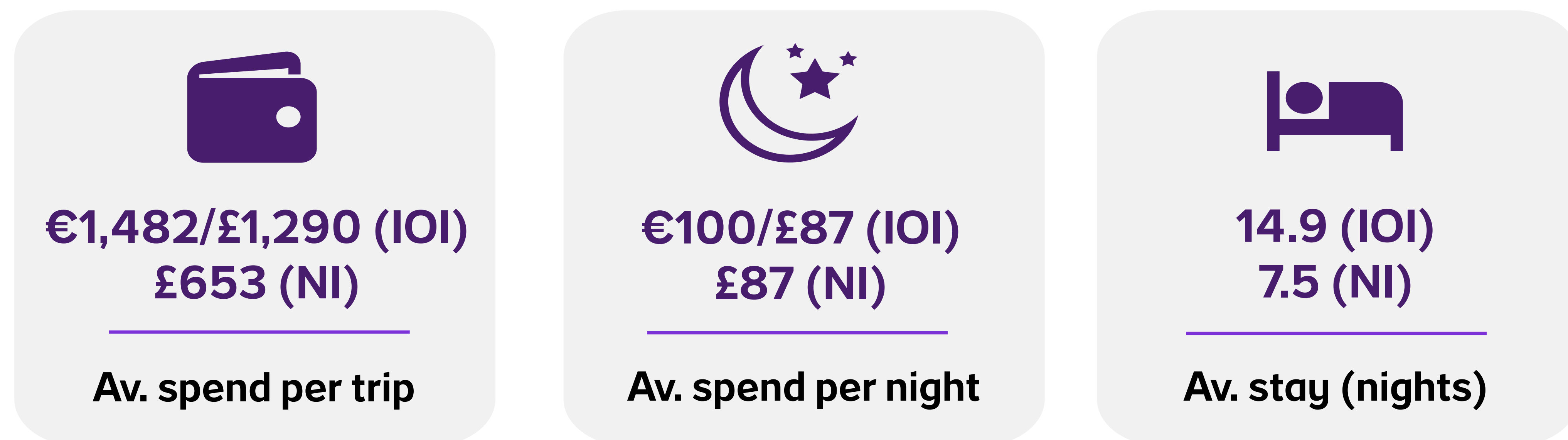
## WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Over two-fifths (44%) of Australian tourists visiting the island of Ireland came for a holiday, accounting for 49% of Australian tourism revenue. Half (52%) were visiting friends and/or relatives (VFR), accounting for the second largest share (44%) of Australian tourism revenue.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€104/£90m	49%	62k	44%	690k	33%
 VFR	€93/£81m	44%	73k	52%	1.3m	63%
 BUSINESS	€4/£4m	2%	3k	2%	19k	1%
 OTHER	€9/£8m	4%	5k	4%	70k	3%

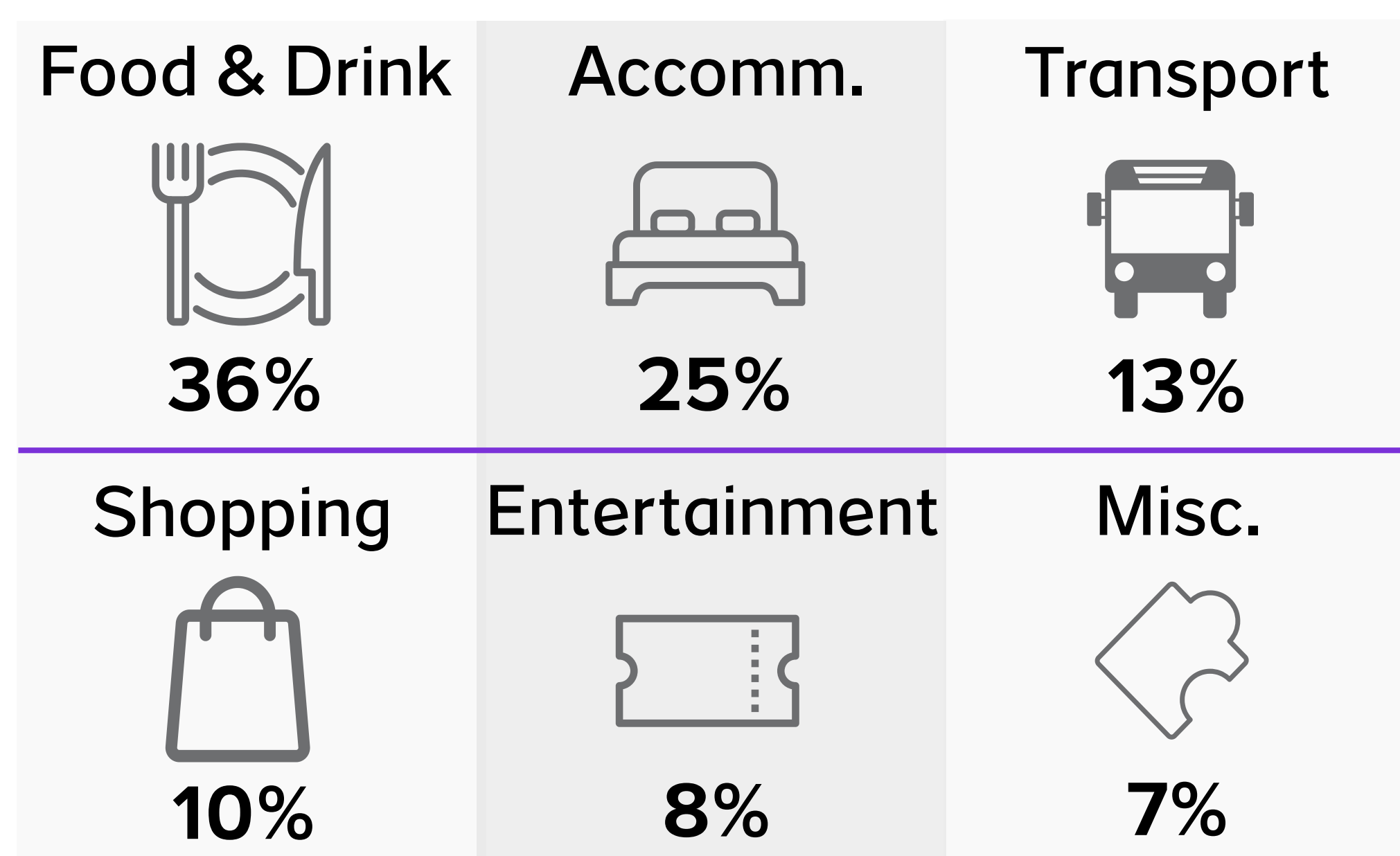
## HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?

On average, Australian tourists spent €1,482/£1,290 per trip or €100/£87 per night and stayed 14.9 nights on the island of Ireland.



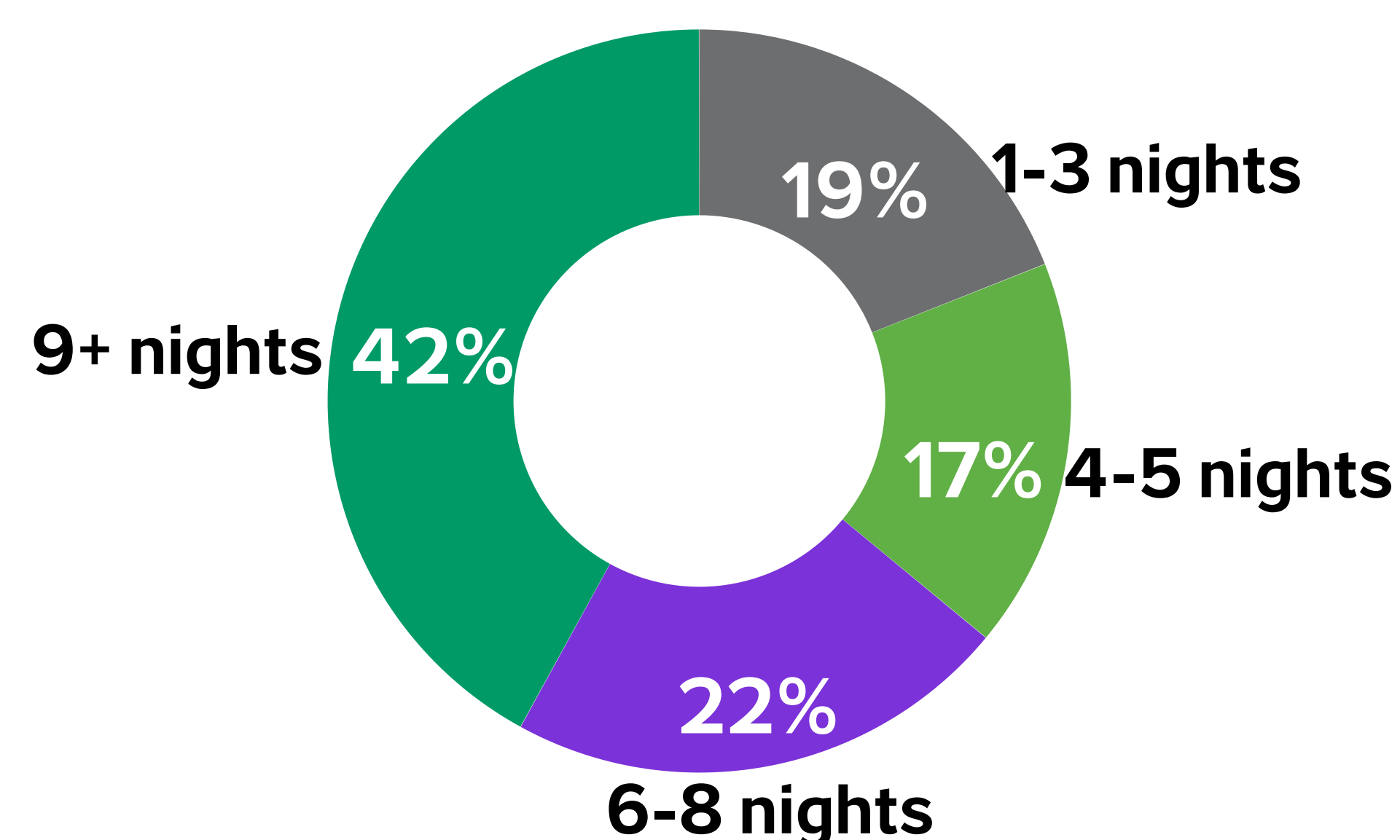
## HOW DID OUR TOURISTS SPEND THEIR MONEY?

Australian tourists' revenue was spent more on food and drink (36%) than any other element of their trip.



## HOW LONG DID OUR TOURISTS STAY?

Two-fifths (42%) stayed nine or more nights on the island of Ireland.



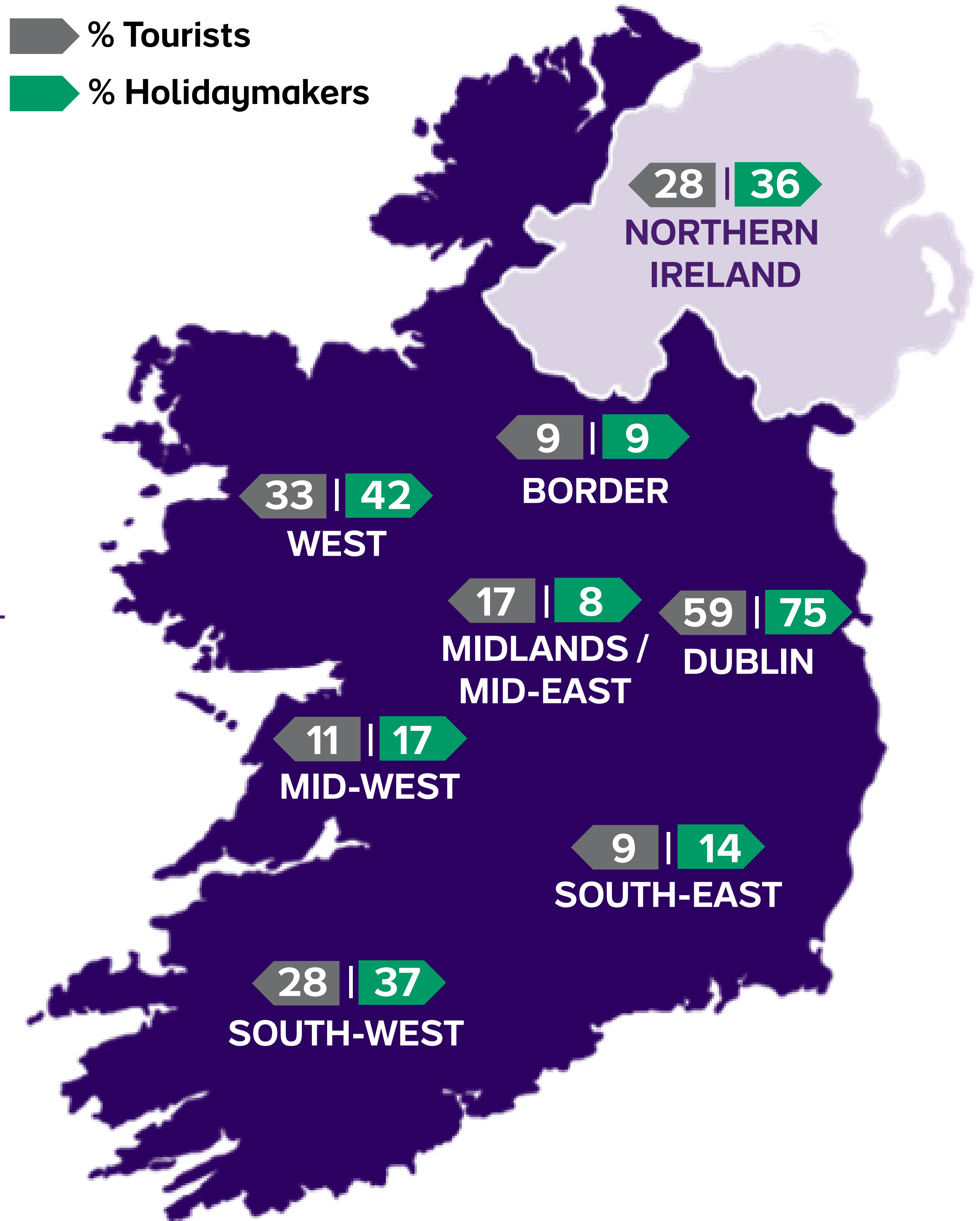


# INBOUND TOURISTS AND HOLIDAYMAKERS

## WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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

Australian holidaymakers were more likely to overnight on both sides of the border, with around a quarter (27%) doing so, compared to 18% of Australian tourists.

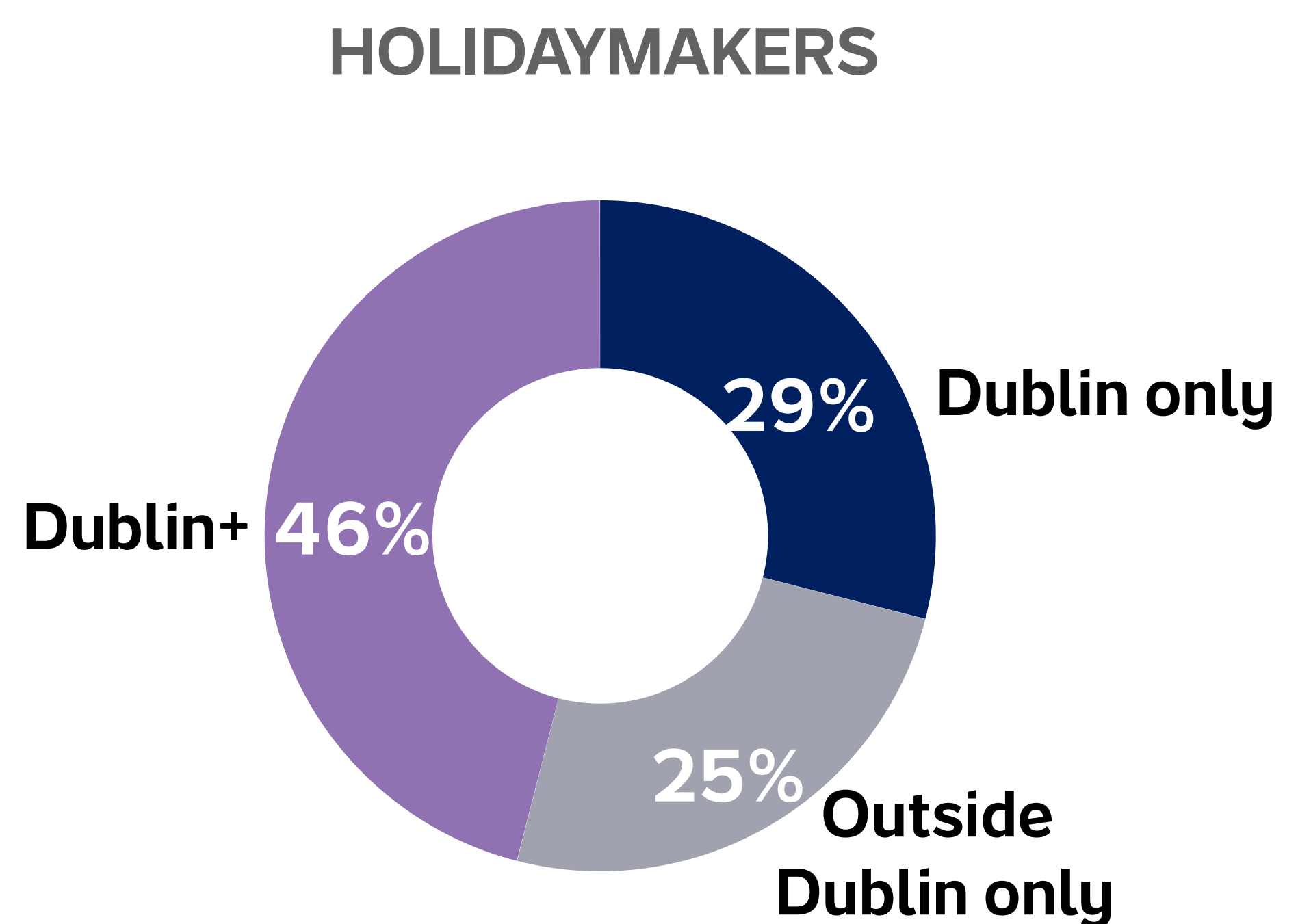
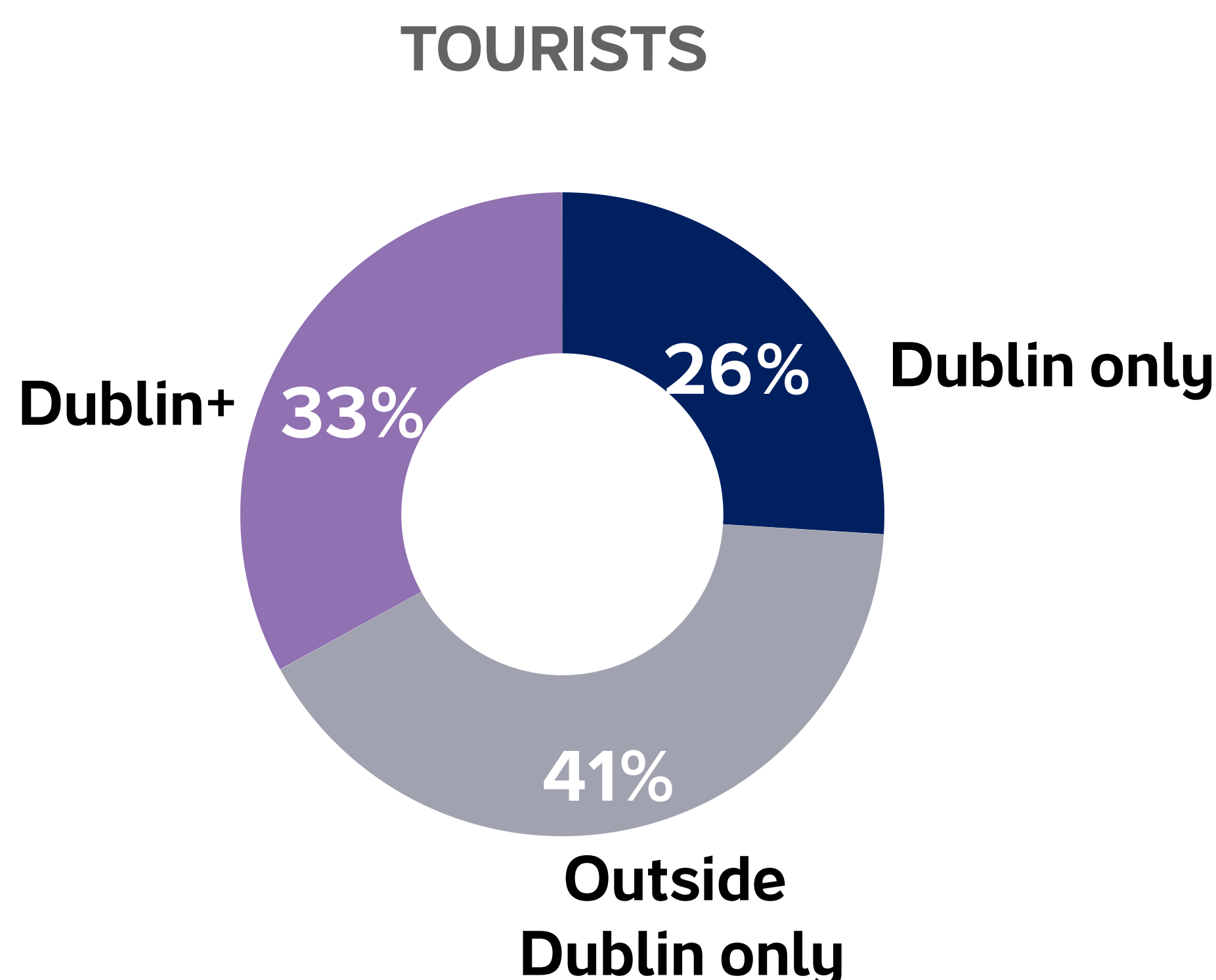


Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	West	West
#3	South-West and Northern Ireland	South-West

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

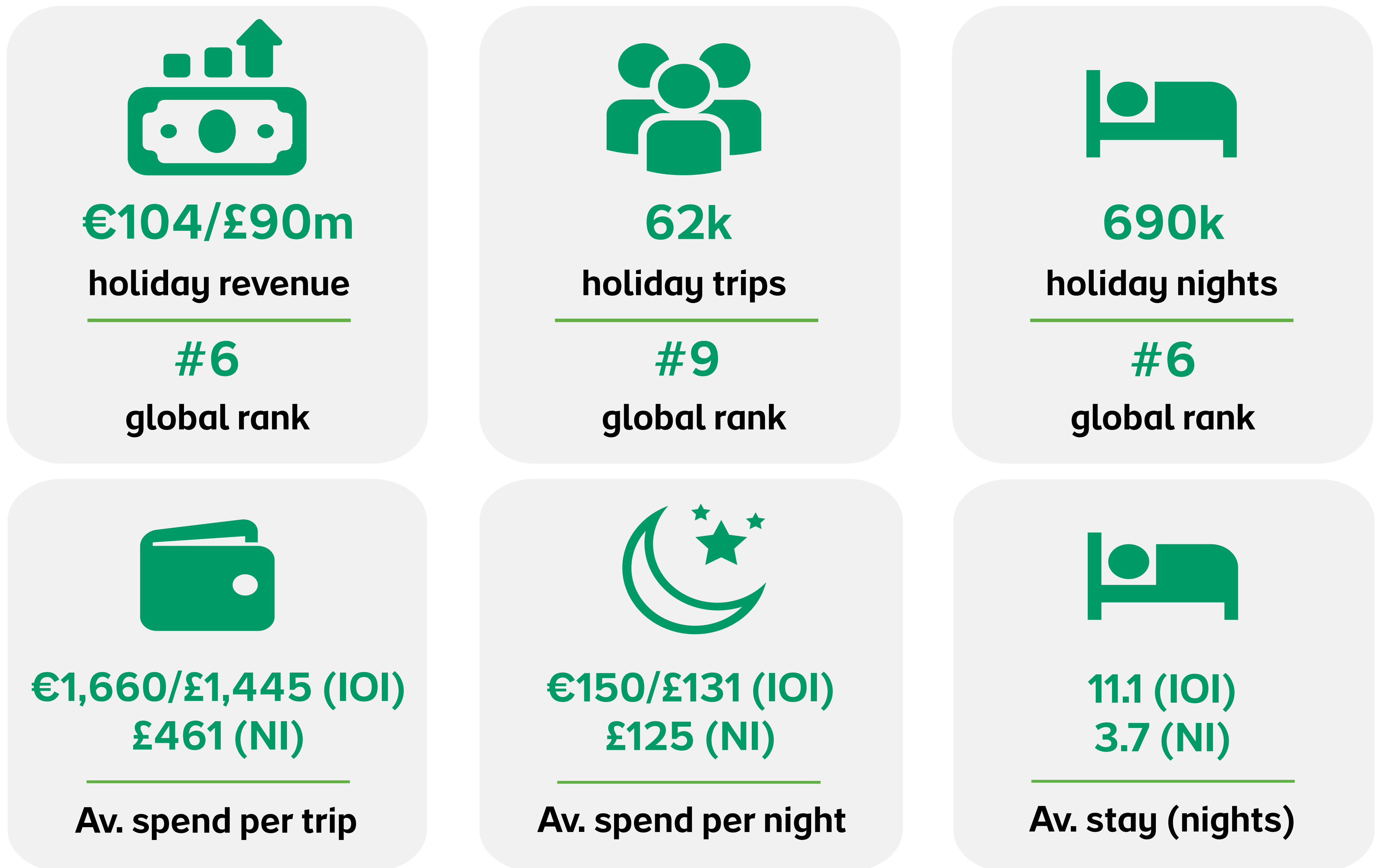
## WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of Australian tourists (59%) and holidaymakers (75%).



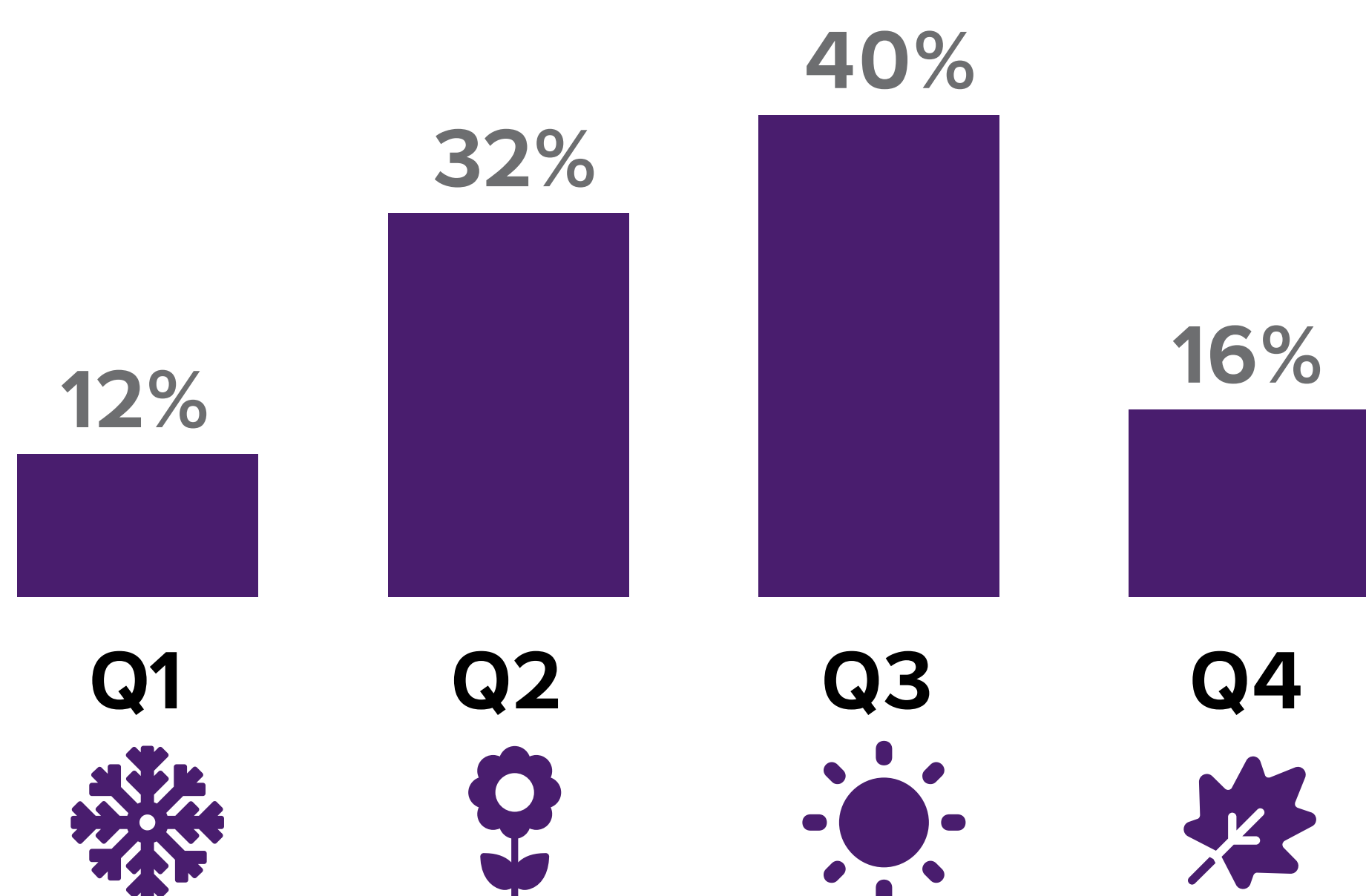
# INBOUND HOLIDAYMAKERS

Australia was the island of Ireland’s sixth-largest source of holiday revenue and holiday nights, and the ninth-largest source of holidaymakers. Australian holidaymakers stayed for an average of 11.1 nights on the island of Ireland. Those visiting Northern Ireland stayed for an average of 3.7 nights.



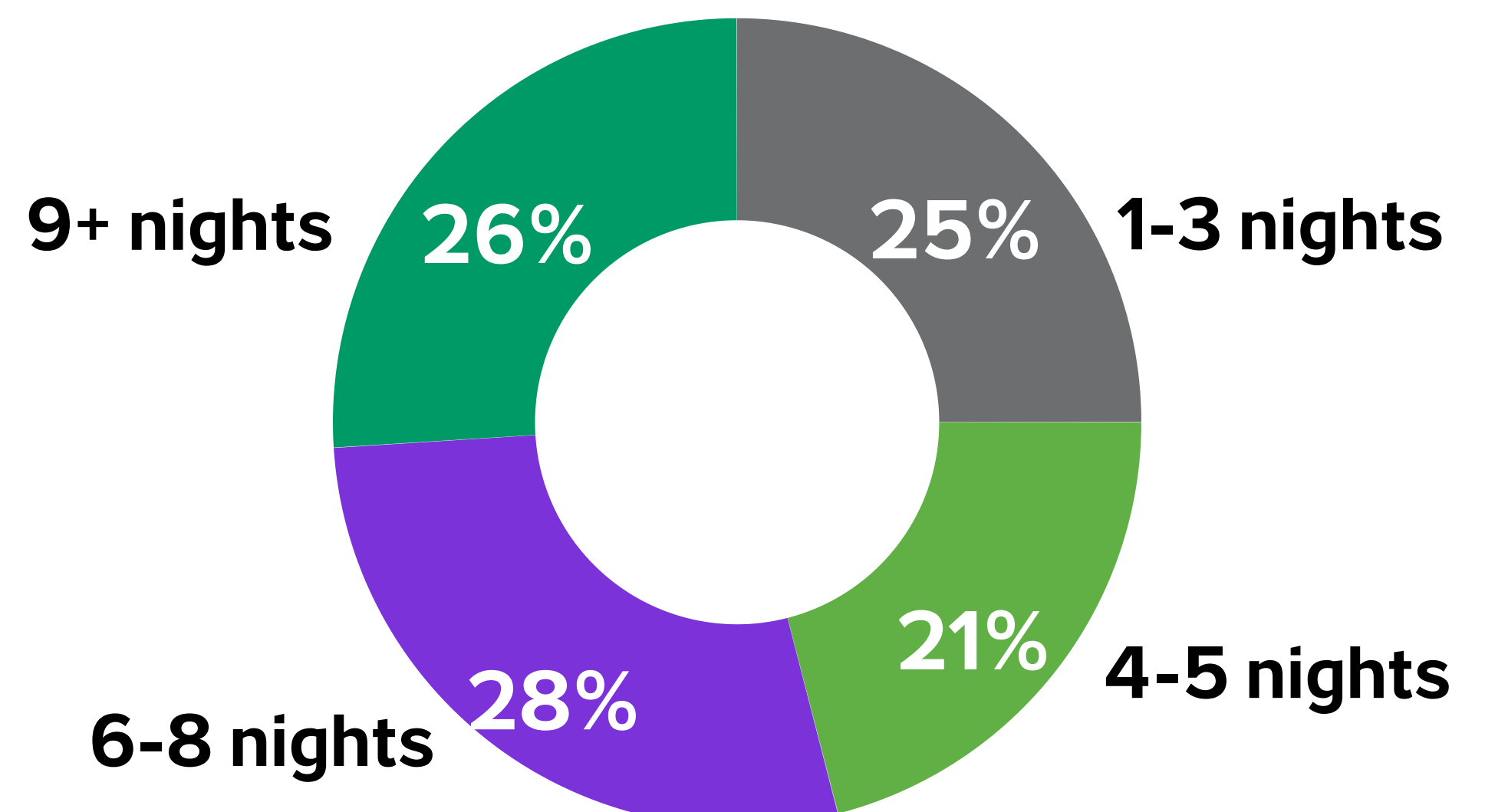
## WHEN DID OUR HOLIDAYMAKERS VISIT?

Seven in ten (72%) visited the island of Ireland during Q2 and Q3 (April to September).



## HOW LONG DID OUR HOLIDAYMAKERS STAY?

Over half (54%) of Australian holidaymakers stayed six or more nights on the island of Ireland.

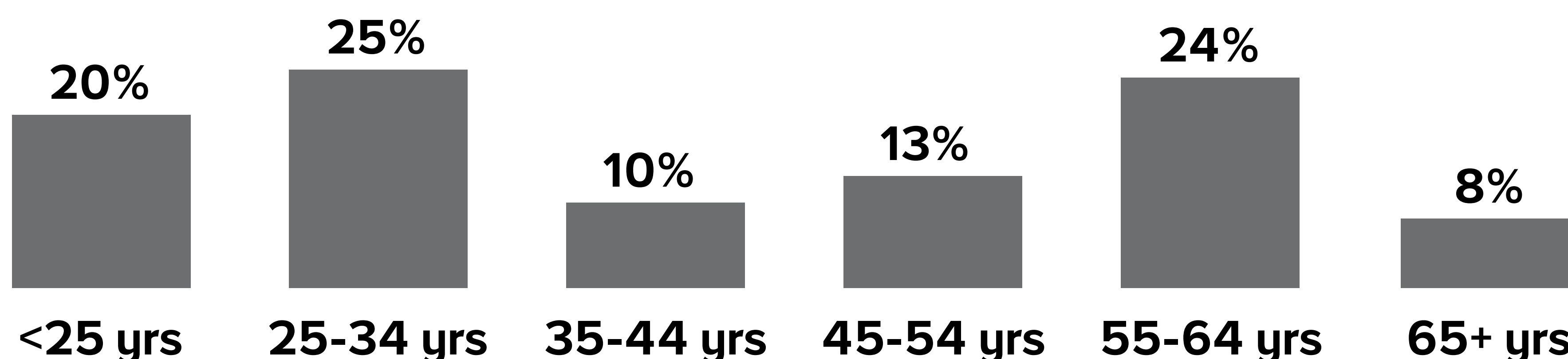




# INBOUND HOLIDAYMAKERS

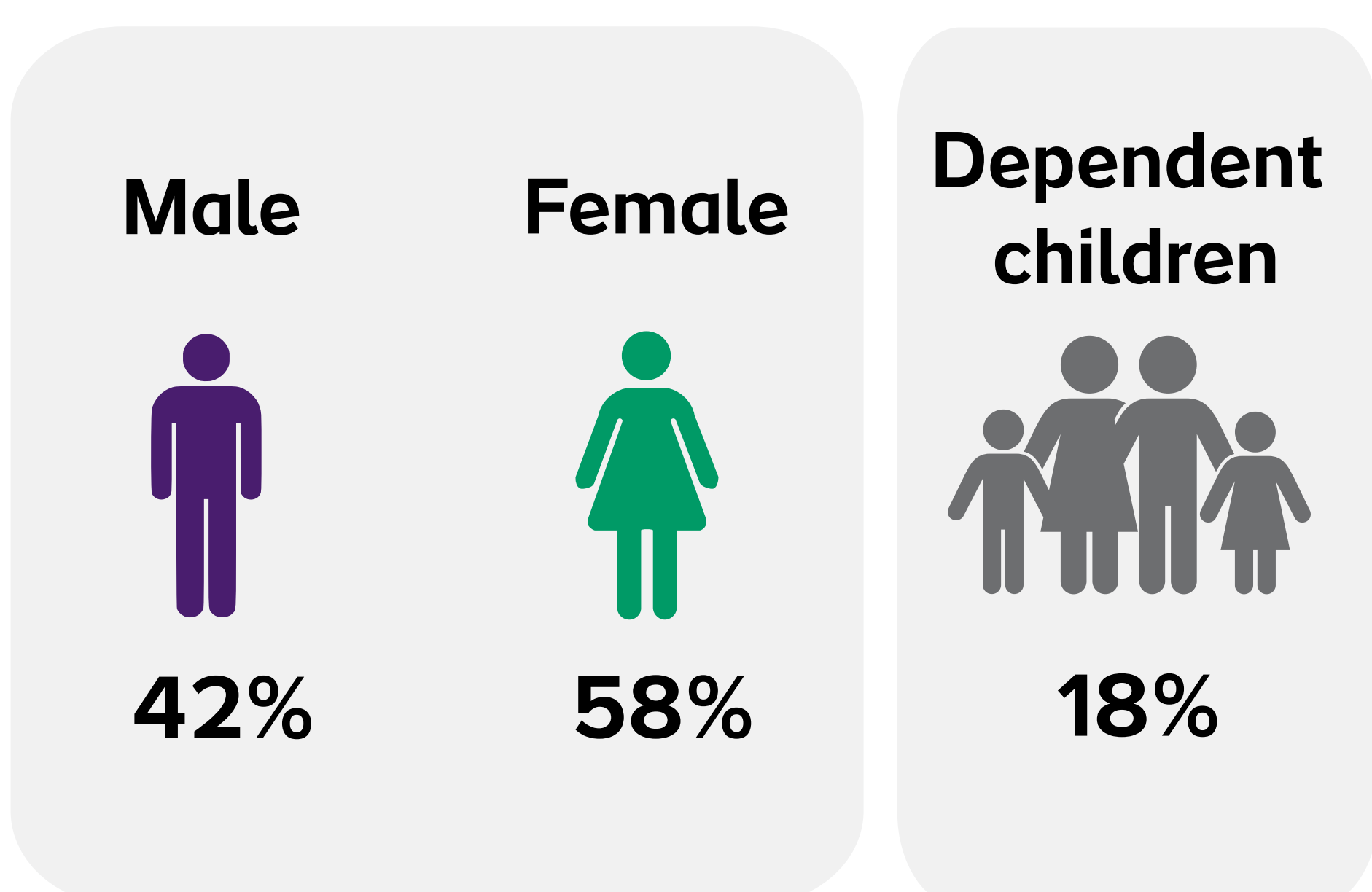
## WHAT AGE WERE OUR HOLIDAYMAKERS?

Over two-fifths (44%) of Australian holidaymakers were under 35 years old.



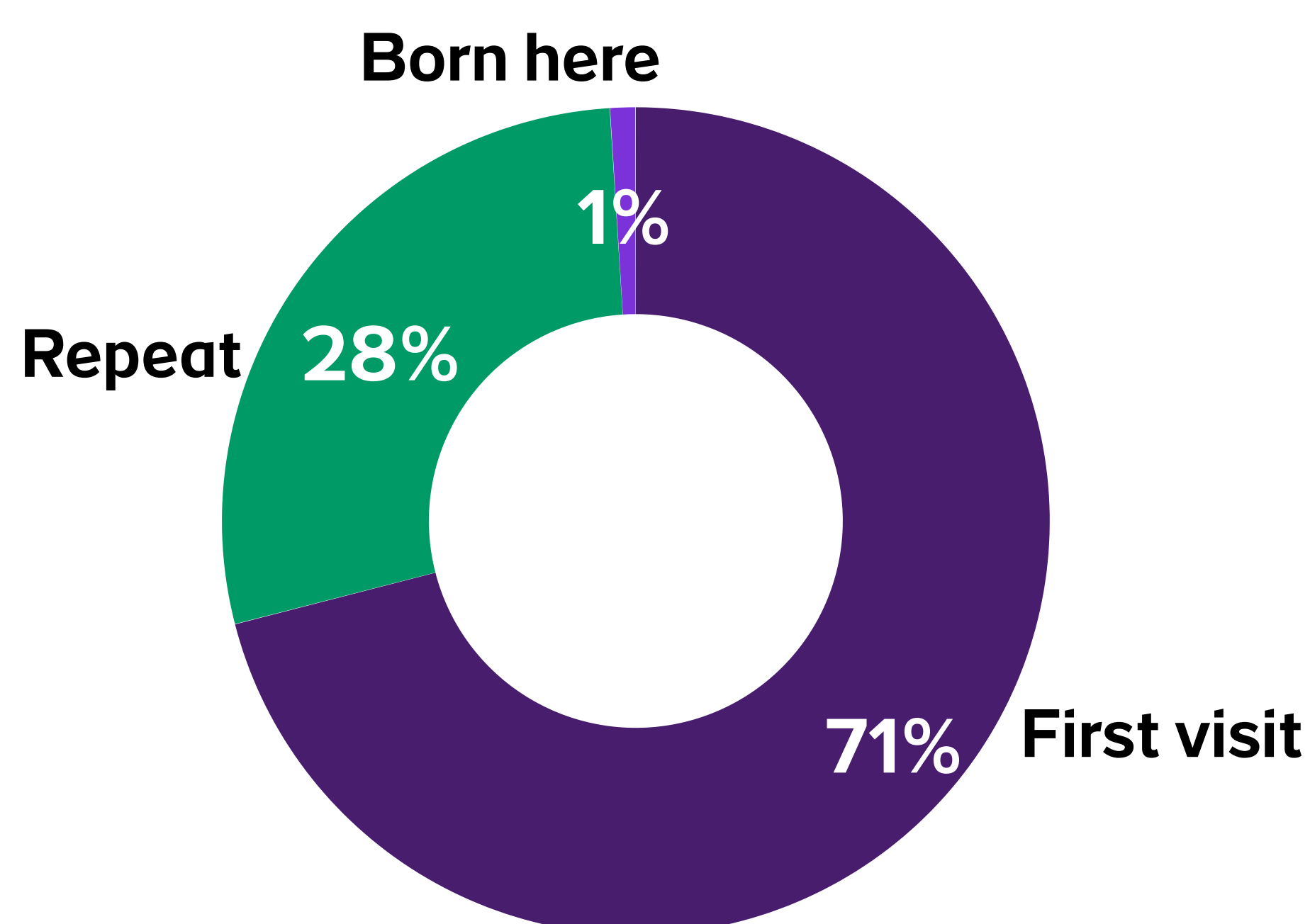
## HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

Around one-in-six (18%) Australian holidaymakers had dependent children in the household (whether empty nesters or pre-children).



## HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

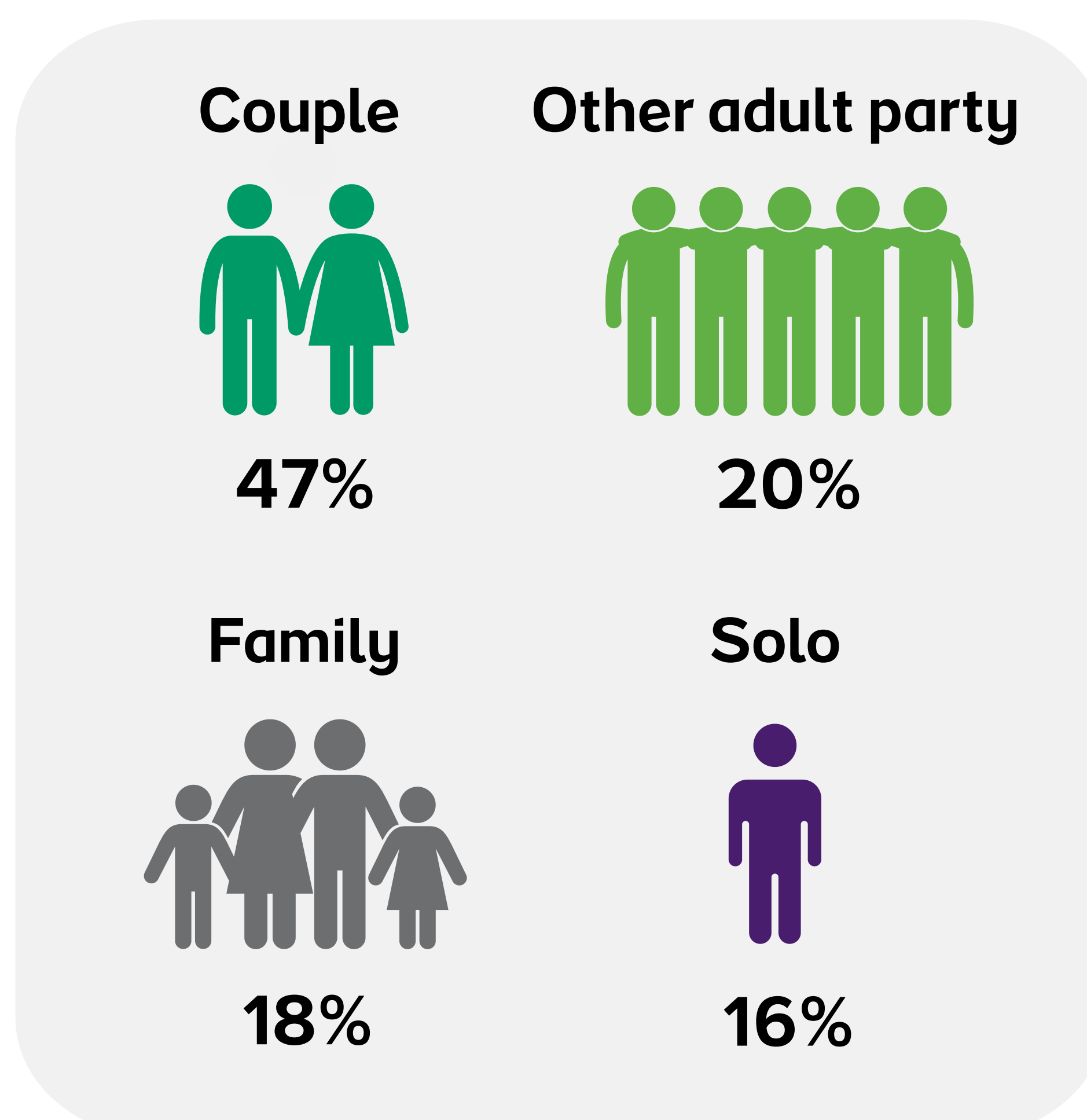
It was a first visit for around seven-in-ten (71%) Australian holidaymakers.



## WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Almost half (47%) of Australian holidaymakers travelled with their spouse/partner.

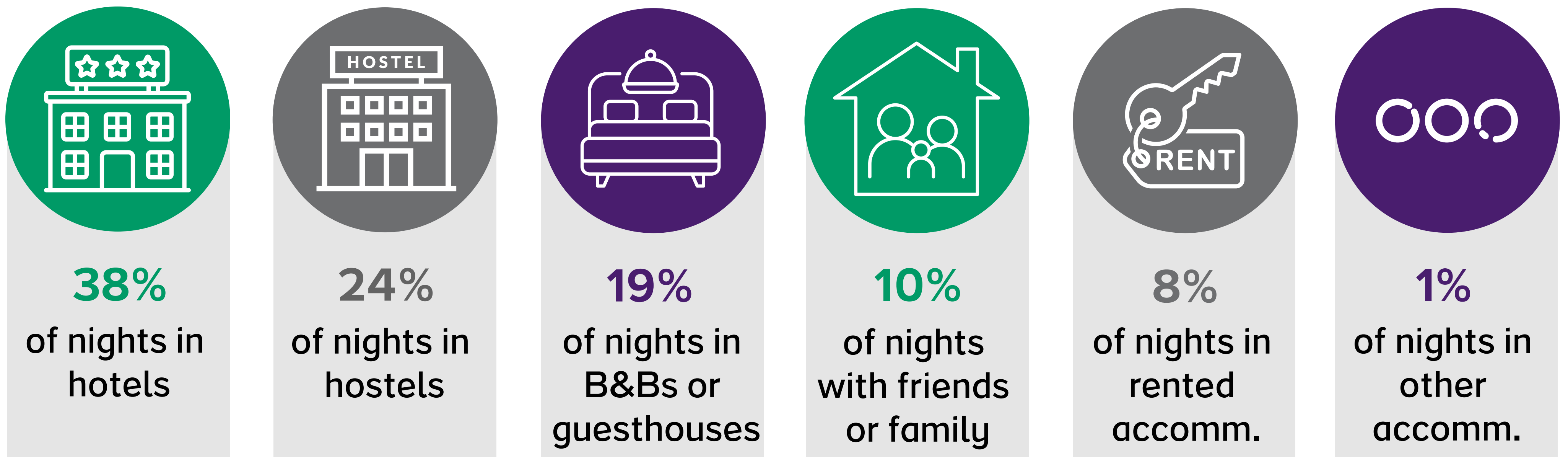
One-fifth (20%) visited with an "other adult party".



## INBOUND HOLIDAYMAKERS

### WHERE DID OUR HOLIDAYMAKERS STAY?

The majority (61%) of nights stayed by Australian holidaymakers were in hotels (38%) and hostels (24%). A fifth (19%) of nights stayed were in B&Bs or guesthouses.



### HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

The majority (95%) of Australian holidaymakers travelled independently and half (49%) used a car while on the island of Ireland.

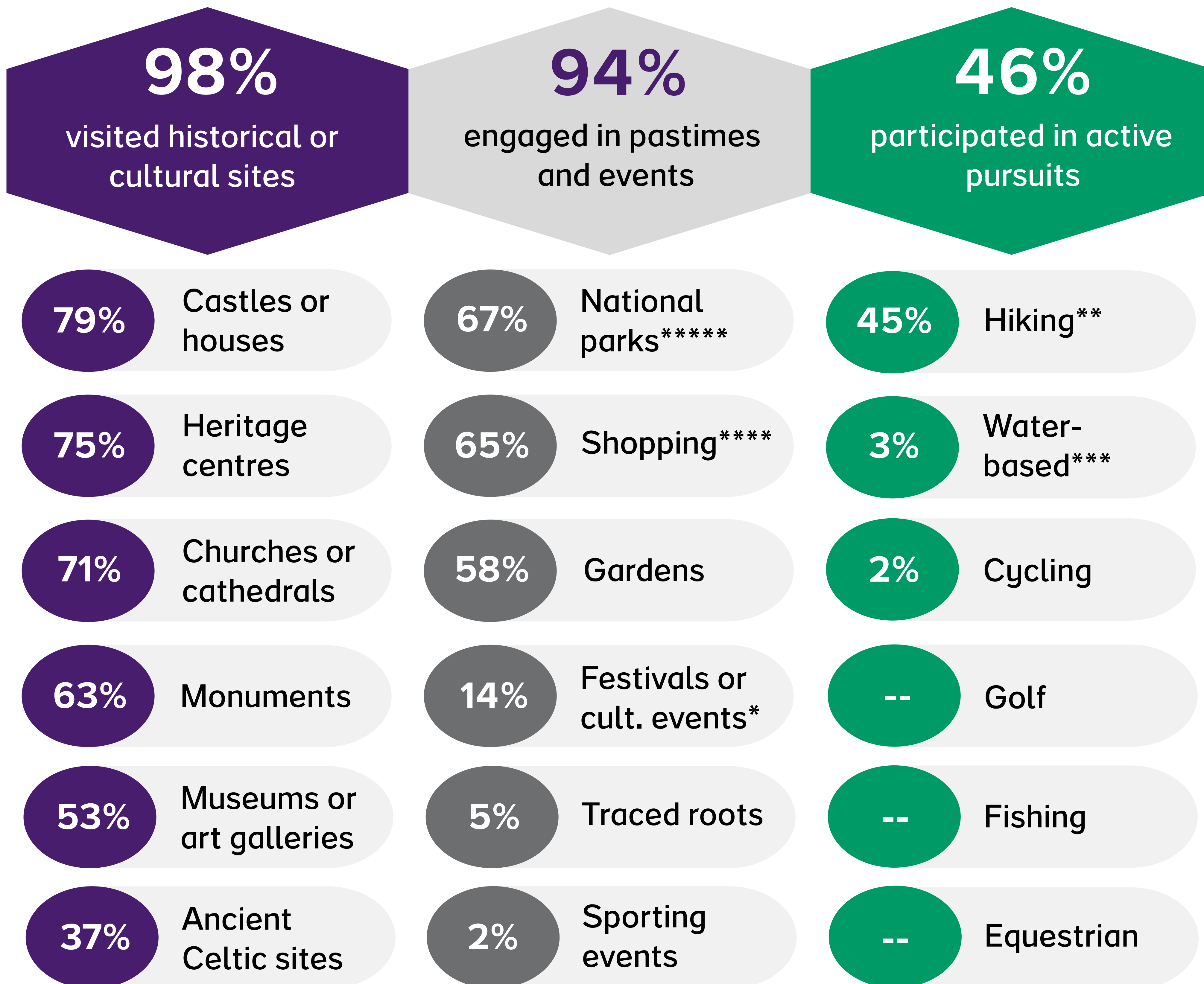




# INBOUND HOLIDAYMAKERS

## WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

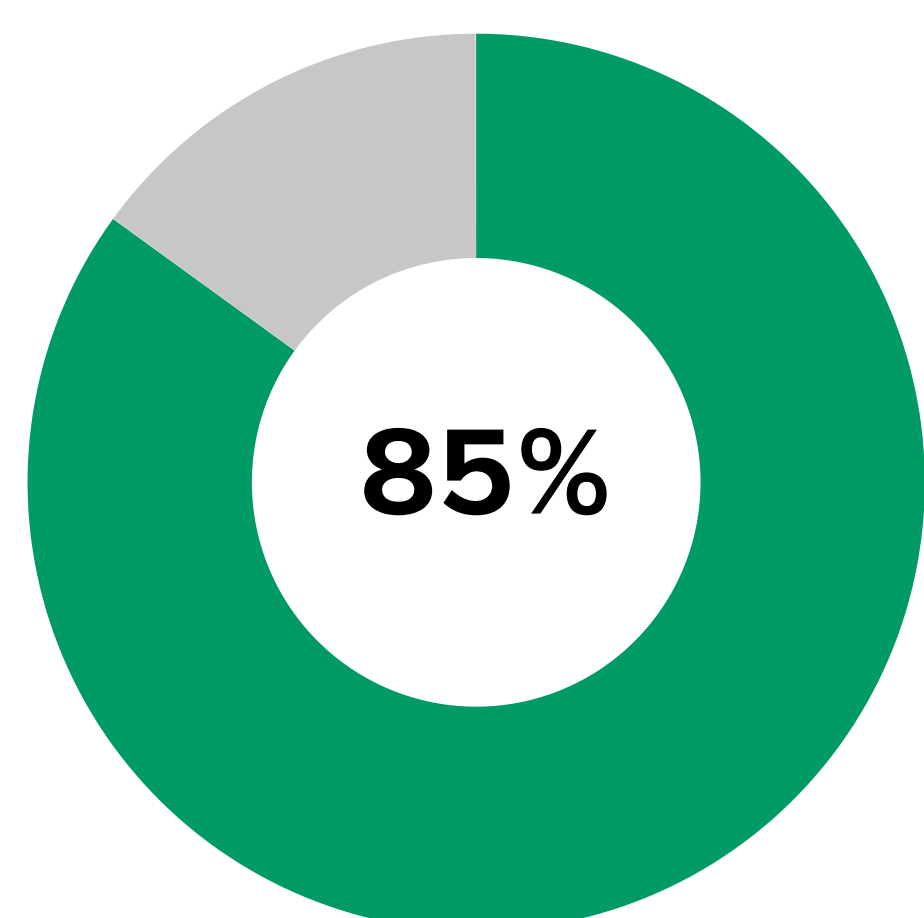
Australian holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



\*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

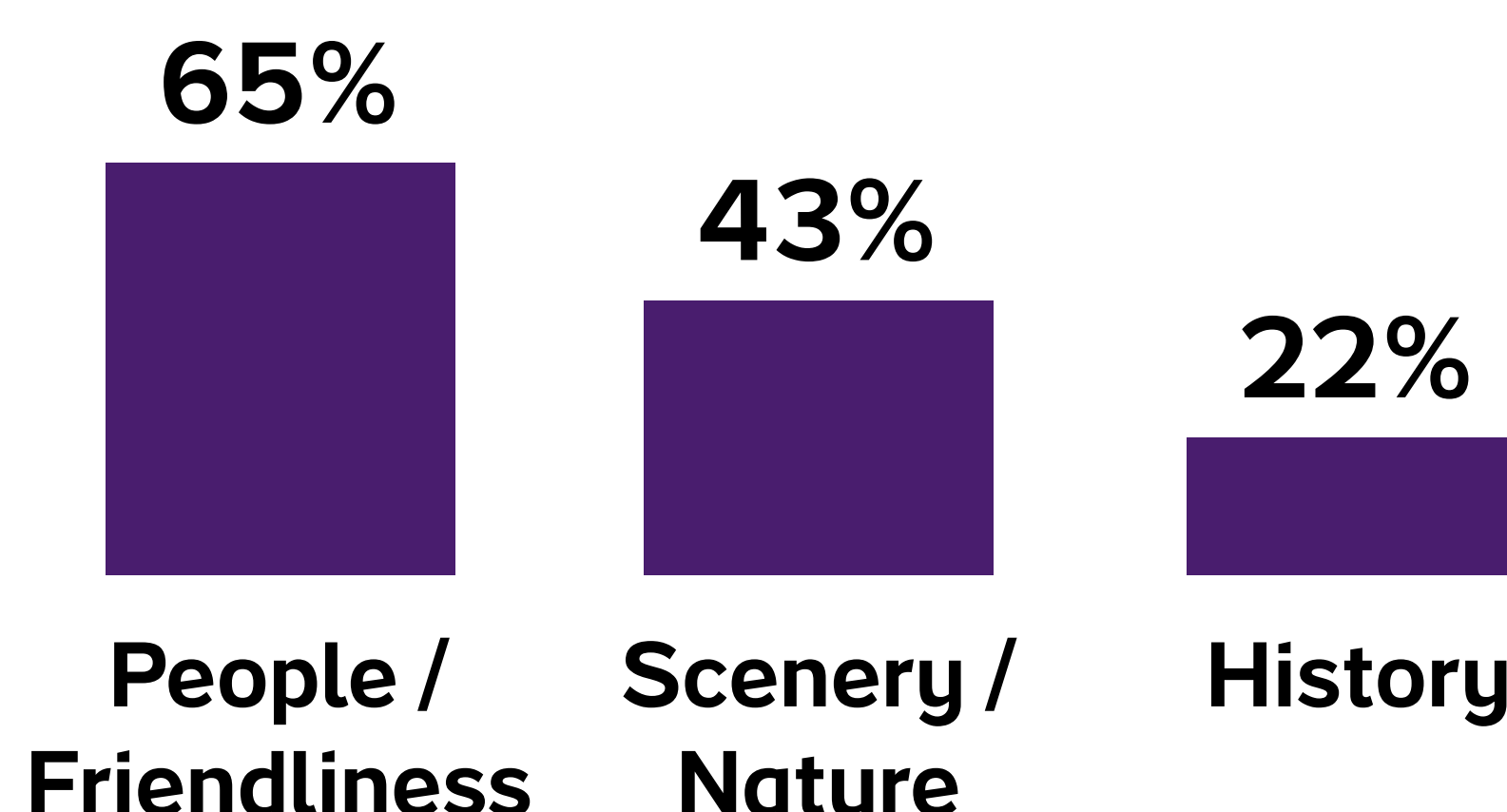
The majority (85%) of Australian holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (65%), the scenery and nature (43%) and history (22%).



**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

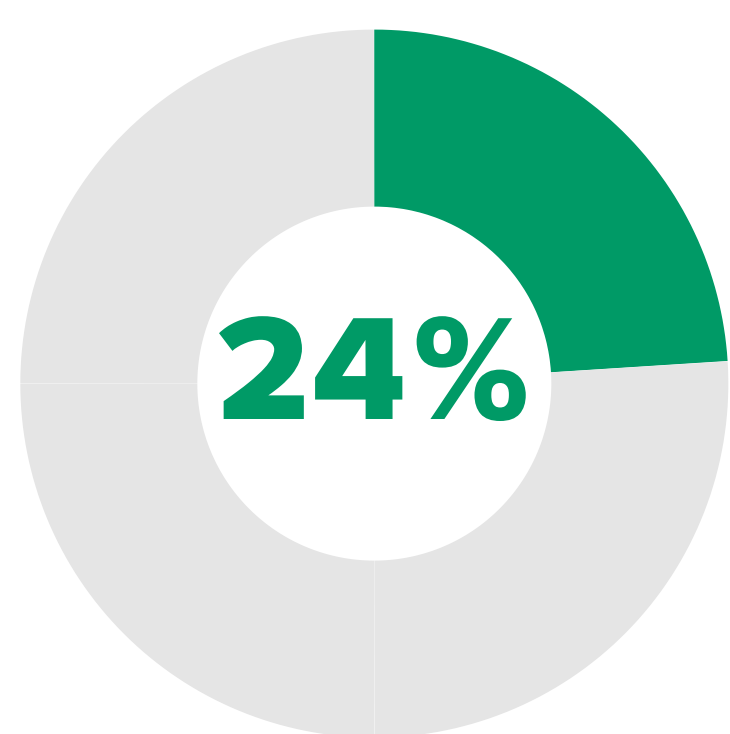
### Promoters - Top 3 reasons



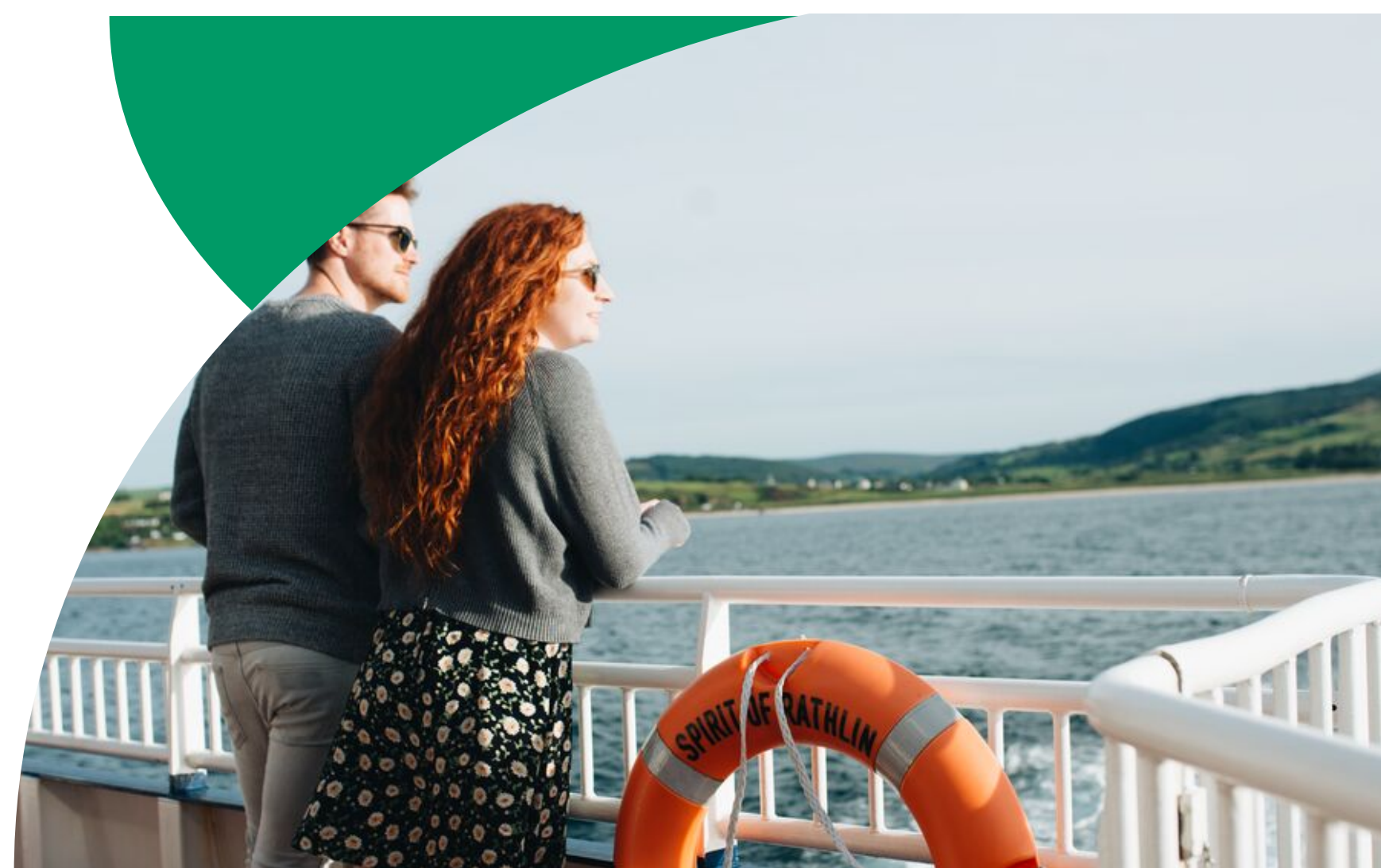
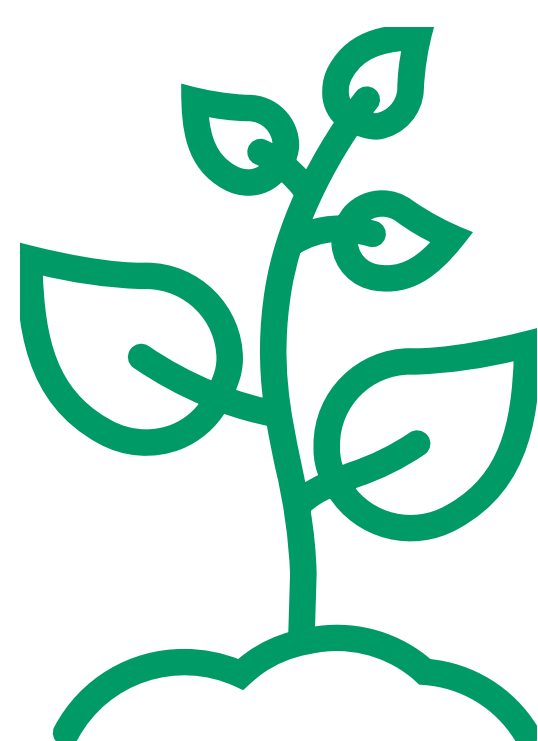


# ENRICHMENT EXPLORERS

## 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.

They are less likely to have children and most likely to travel with a partner

### 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.

\*\*Australia was the world's 21st largest outbound market in 2023 and 35% of all outbound trips from Australia were to Europe

### 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