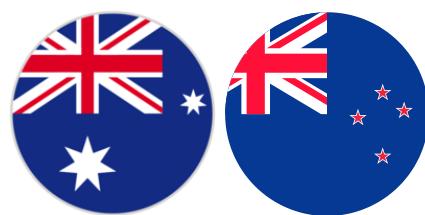


AUSTRALIA & NEW ZEALAND

MARKET PROFILE

2024



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, eight-largest source of overseas revenue and tenth-largest source of overseas trips.



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 (30%) and Victoria (20%).

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

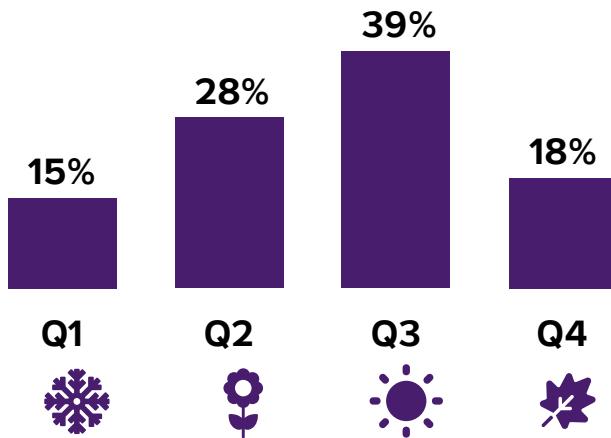
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?

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



INBOUND TOURISTS

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.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€106/£93m	49%	72k	46%	750k	32%
 VFR	€89/£77m	41%	76k	49%	1,447k	61%
 BUSINESS	€6/£5m	3%	4k	2%	34k	1%
 OTHER	€16/£14m	7%	10k	6%	144k	6%

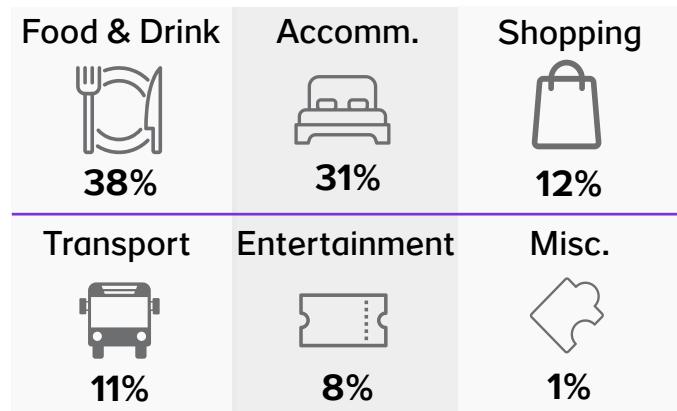
HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?

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.



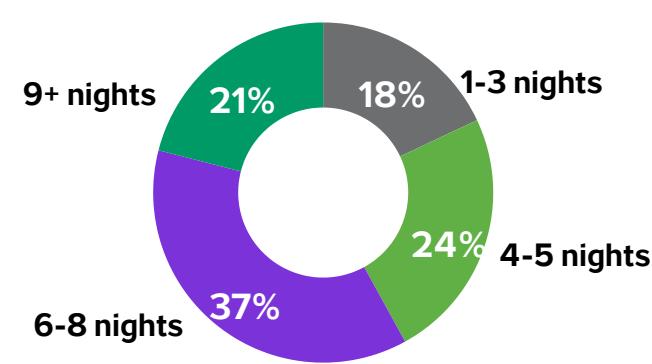
HOW DID OUR TOURISTS SPEND THEIR MONEY?

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



HOW LONG DID OUR TOURISTS STAY?

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



INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

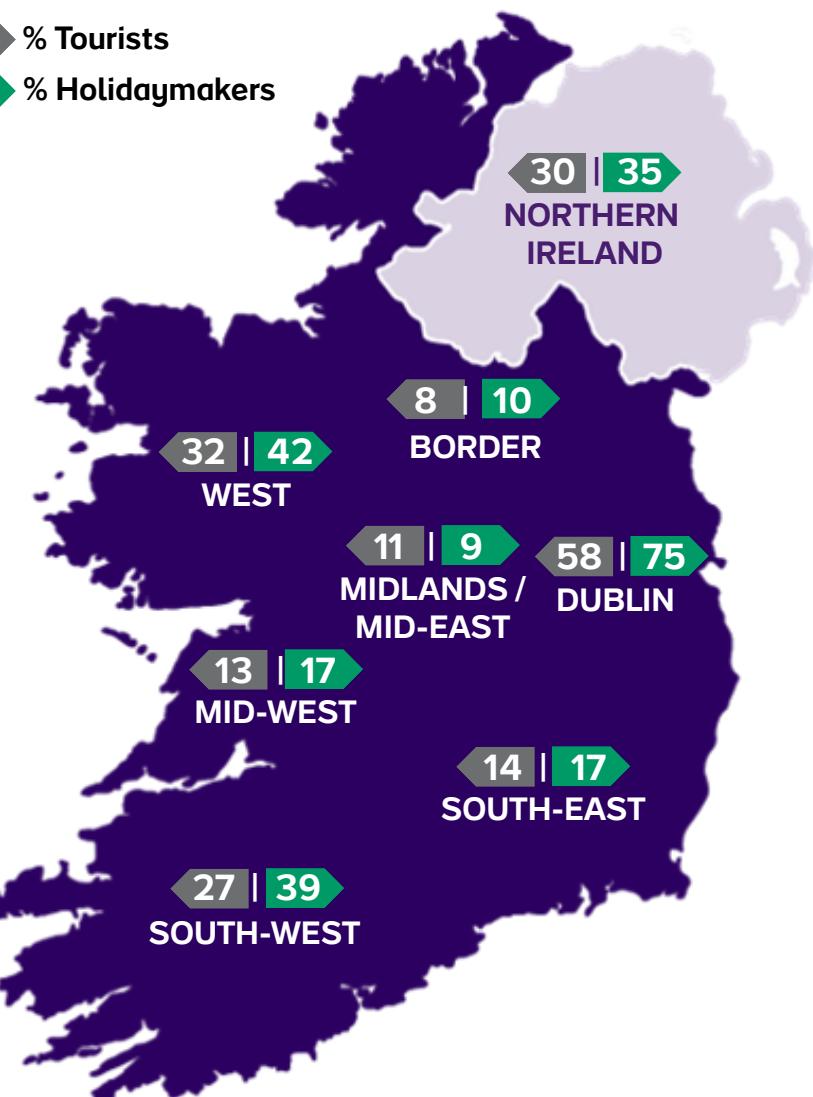
Dublin and the West emerged as the most favoured destinations among ANZ tourists and holidaymakers. Northern Ireland ranked third in popularity for tourists, while the West was third place among holidaymakers.

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.

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

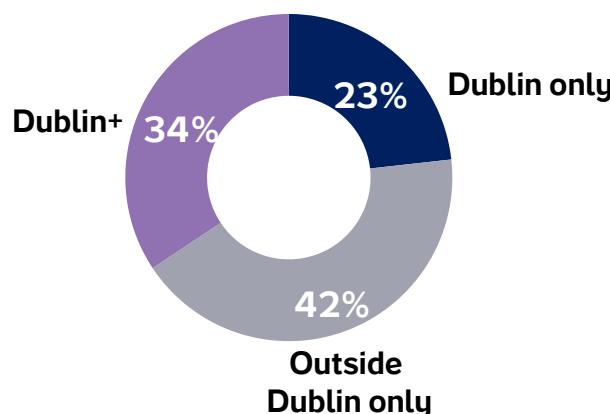
■ % Tourists
■ % Holidaymakers



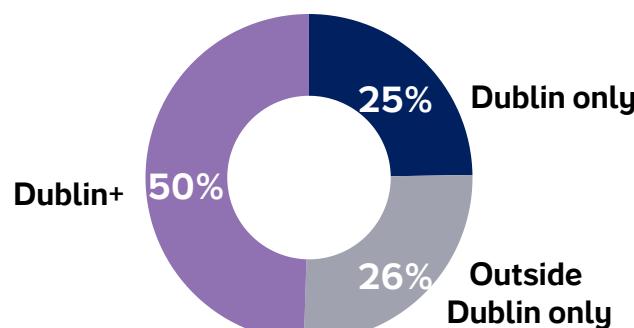
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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

TOURISTS



HOLIDAYMAKERS



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/£93m
holiday revenue
#7
global rank



72k
holiday trips
#10
global rank



750k
holiday nights
#6
global rank



**€1,477/£1,285 (IOI)
£368 (NI)**
Av. spend per trip



**€142/£123 (IOI)
£105(NI)**
Av. spend per night



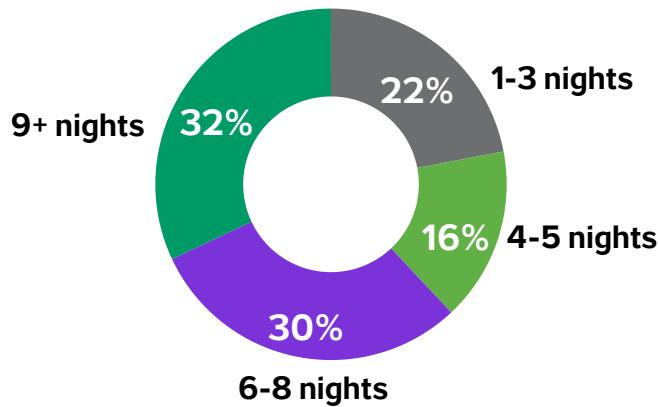
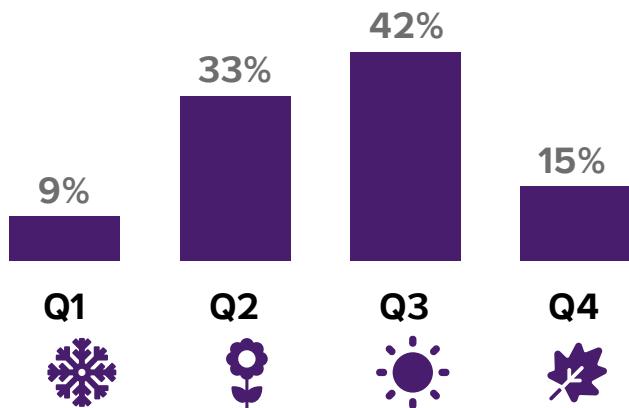
**10.4 (IOI)
3.5 (NI)**
Av. stay (nights)

WHEN DID OUR HOLIDAYMAKERS VISIT?

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

HOW LONG DID OUR HOLIDAYMAKERS STAY?

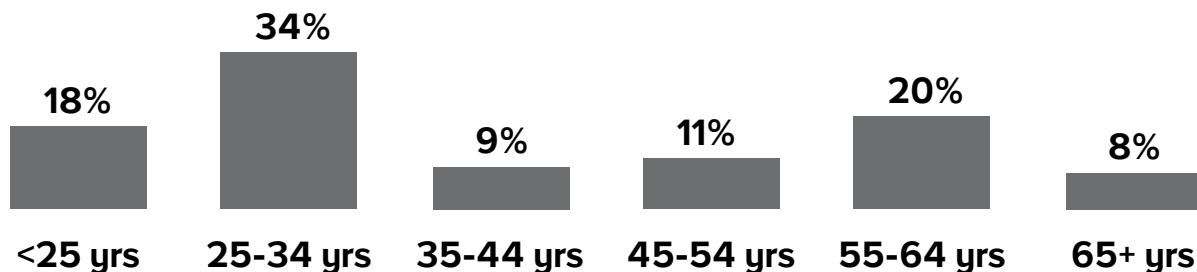
A third (32%) of ANZ holidaymakers stayed nine or more nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

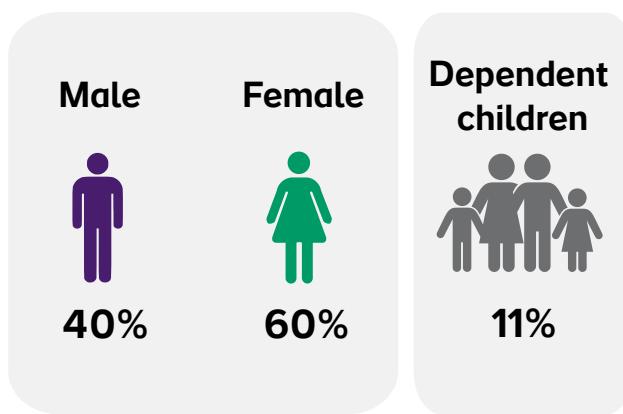
WHAT AGE WERE OUR HOLIDAYMAKERS?

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



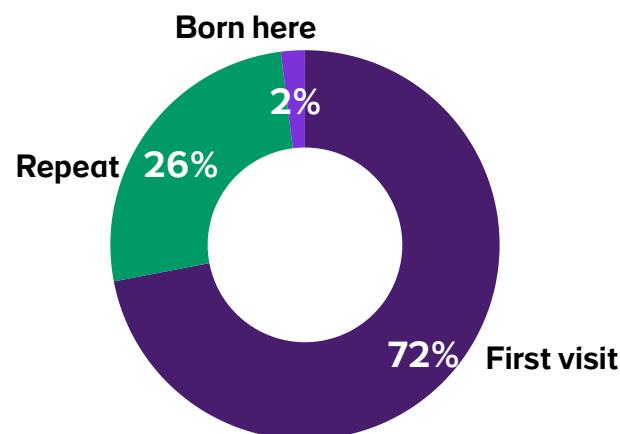
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

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



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

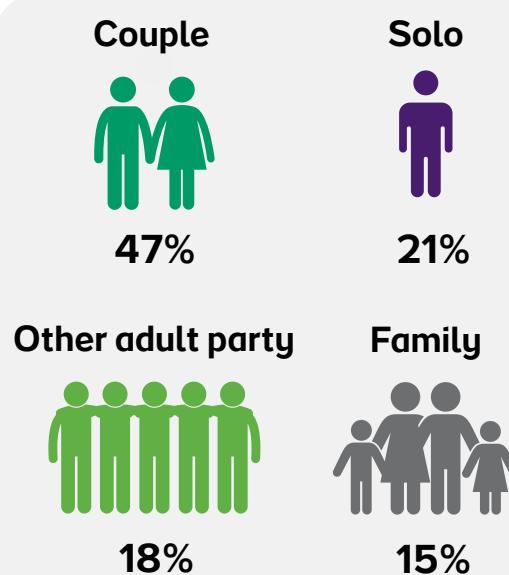
It was a first visit for around seven-in-ten (72%) ANZ holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Almost half (47%) of holidaymakers from the region travelled with their spouse/partner.

One-fifth (21%) visited alone.



INBOUND HOLIDAYMAKERS

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.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

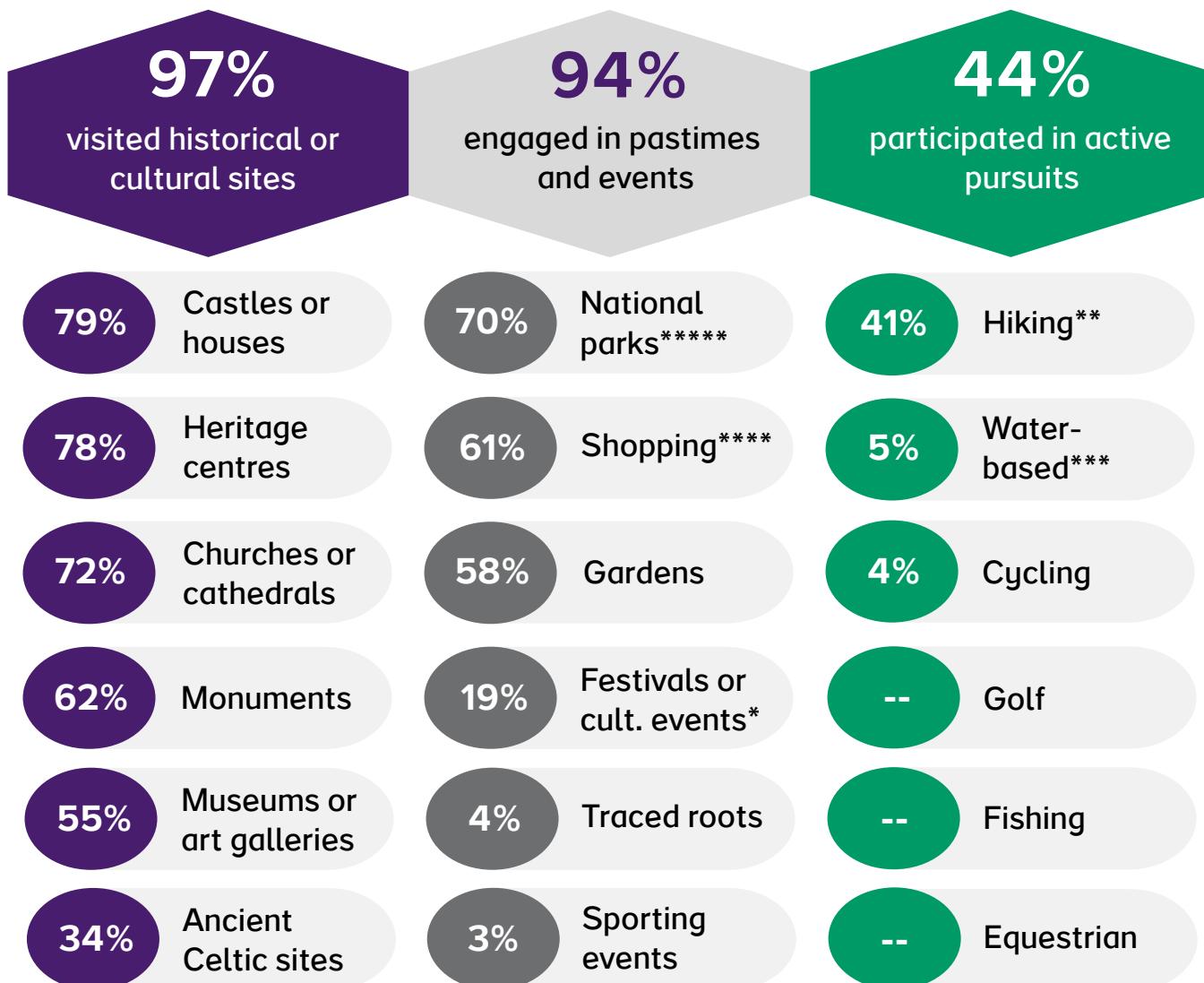
The majority (92%) of holidaymakers from Australia and New Zealand travelled independently and half (51%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

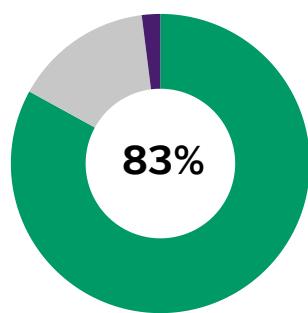
ANZ holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



*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

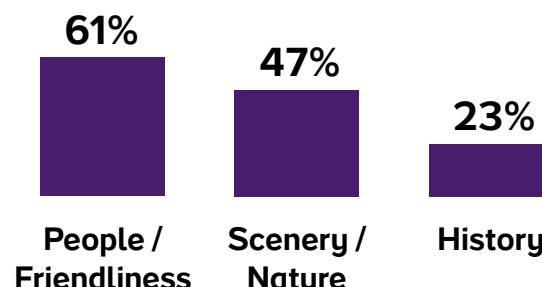
The majority (83%) of holidaymakers from Australia and New Zealand would recommend a holiday in Ireland to others. The main reasons given are the friendly people (61%), the scenery and nature (47%) and history (23%).



**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 Australia use multiple sources of inspiration when choosing a holiday destination, including family and friends' recommendations and general online searches.

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

DREAMING



45% family and friends' recommendations



37% online search



31% travel websites and online travel agents *



30% social media



28% films, TV shows, travel shows



24% travel articles e.g. magazines, websites



23% destination website

RESEARCH AND PLANNING



56% online search



47% travel websites and online travel agents*



40% destination websites



30% family and friends' recommendations



26% travel articles e.g. magazines, websites



25% social media



13% guidebooks

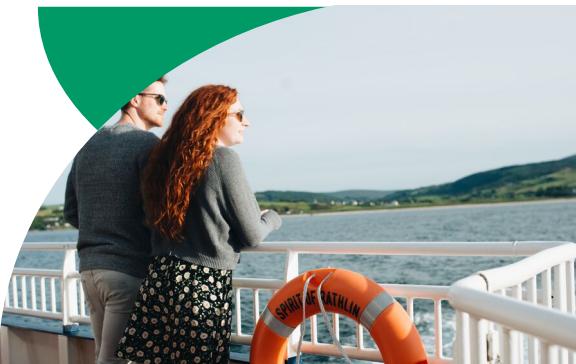
*Travel websites include company websites and booking platforms

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.

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	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