

USA

MARKET PROFILE 2023



INBOUND TOURISTS

The island of Ireland welcomed over 1.2 million American tourists who spent €1.7/£1.5 billion and stayed 10.4 million nights in 2023. The US was the island's second-largest source of overseas revenue (27%), nights (17%) and tourists (15%).



WHERE DID OUR TOURISTS COME FROM?

The majority (55%) of American tourists came from the South (28%) and the West (27%).



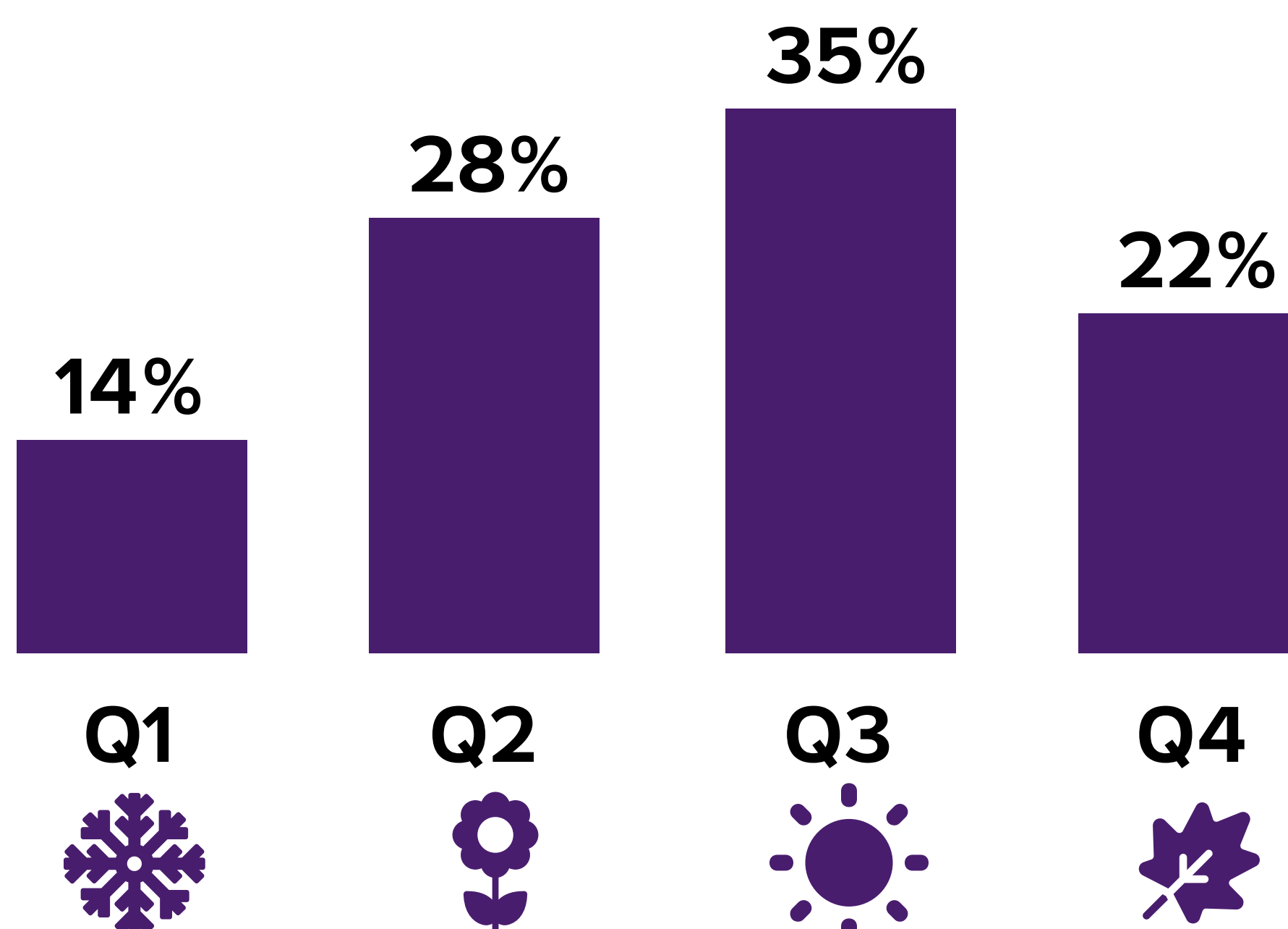
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?





Around two-thirds (64%) of American tourists visited the island during Q2 and Q3 (April - September).



INBOUND TOURISTS

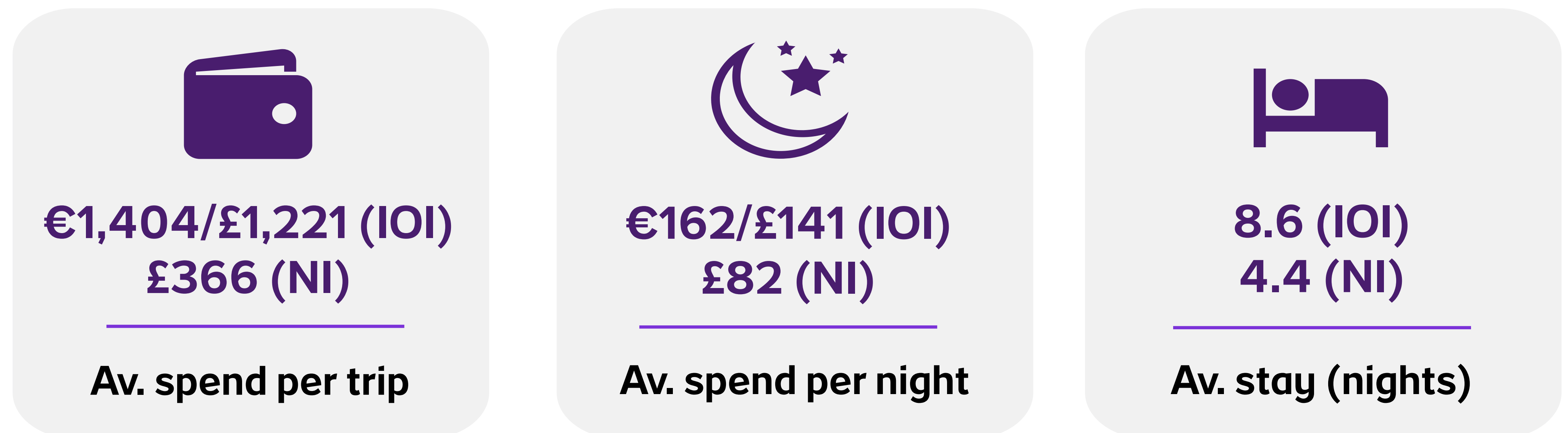
WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Two-thirds (67%) of American tourists came to the island for a holiday and they accounted for 71% of US tourism revenue. Around one-in-five (21%) came to visit friends and relatives.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€1.2/£1.0bn	71%	813k	67%	5.9m	56%
 VFR	€212/£185m	13%	254k	21%	2.7m	25%
 BUSINESS	€149/£130m	9%	81k	7%	685k	7%
 OTHER	€135/£118m	8%	71k	6%	1.2m	12%





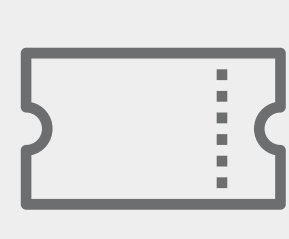

HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?

On average American tourists spent €1,406/£1,221 per trip or €162/£141 per night (highest spend per night) and stayed 8.6 nights on the island of Ireland in 2023.



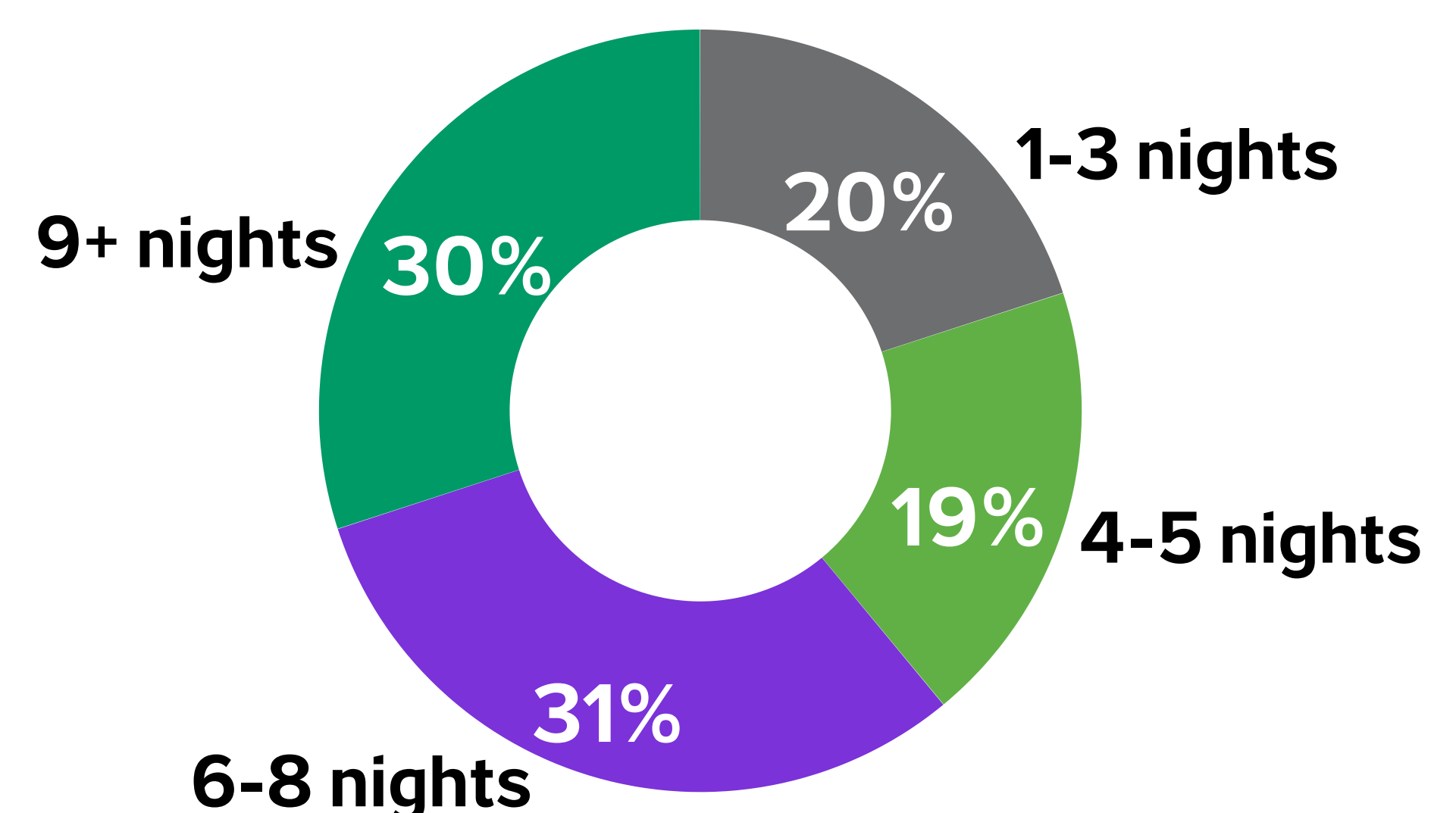
HOW DID OUR TOURISTS SPEND THEIR MONEY?

One-third (33%) of American tourists' revenue was spent on accommodation and another third (32%) was spent on food and drink.

Accomm.  33%	Food & Drink  32%	Shopping  15%
Transport  12%	Entertainment  8%	Misc.  1%

HOW LONG DID OUR TOURISTS STAY?

The majority (61%) stayed six or more nights on the island of Ireland.



INBOUND TOURISTS AND HOLIDAYMAKERS

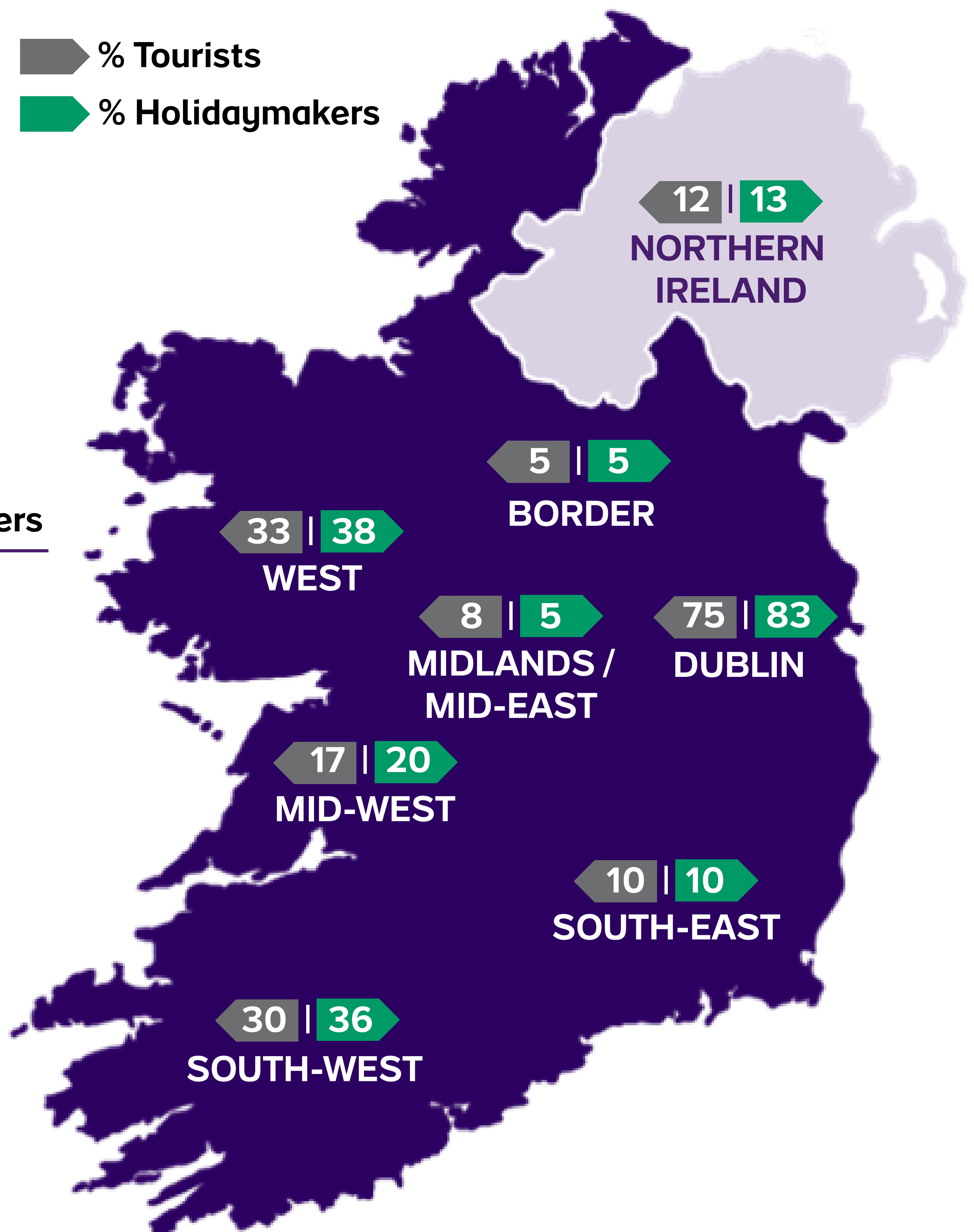
WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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

One-in-ten tourists (9%) and holidaymakers (10%) overnighted on both sides of the border.

▶ % Tourists
▶ % Holidaymakers

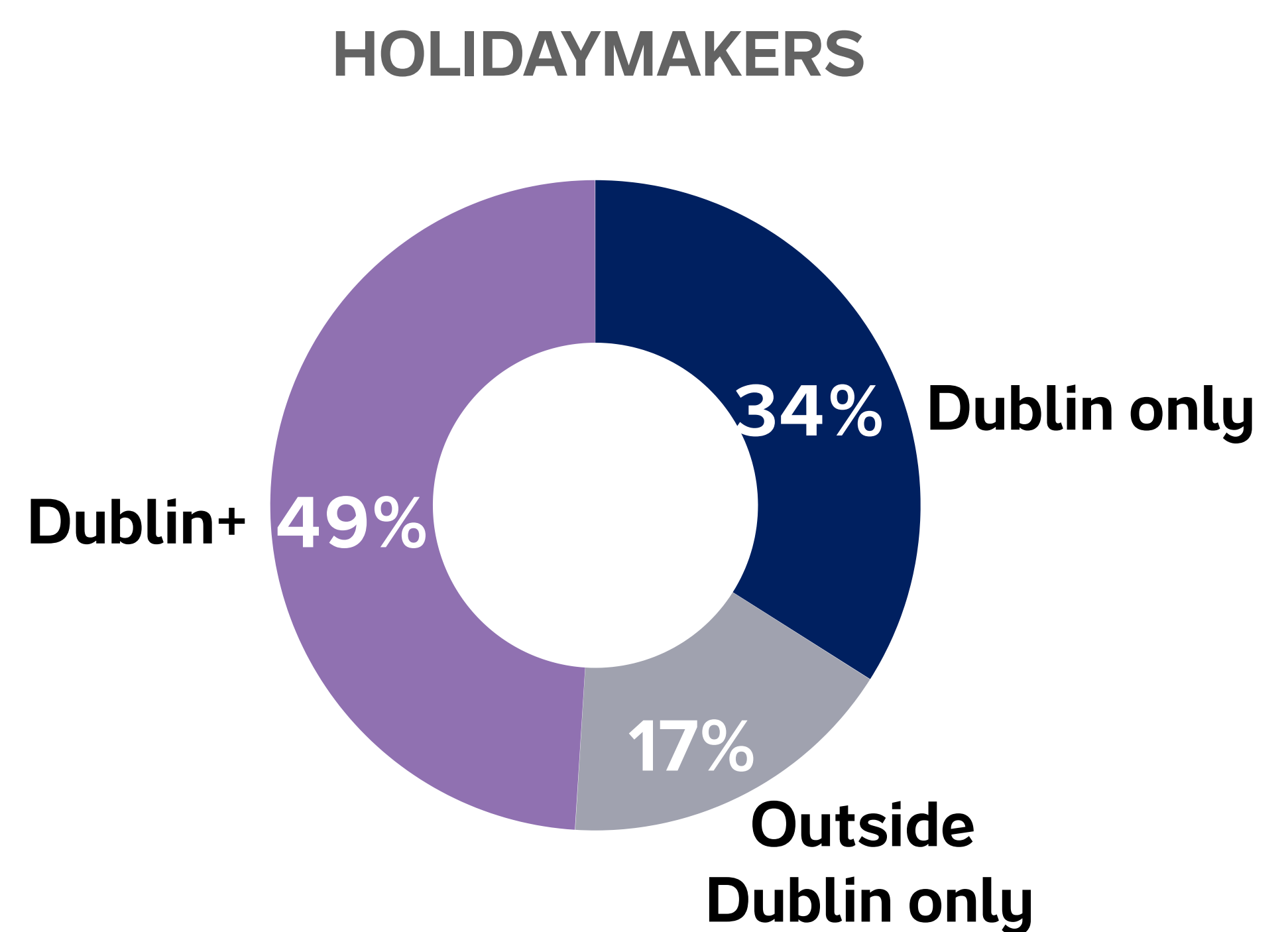
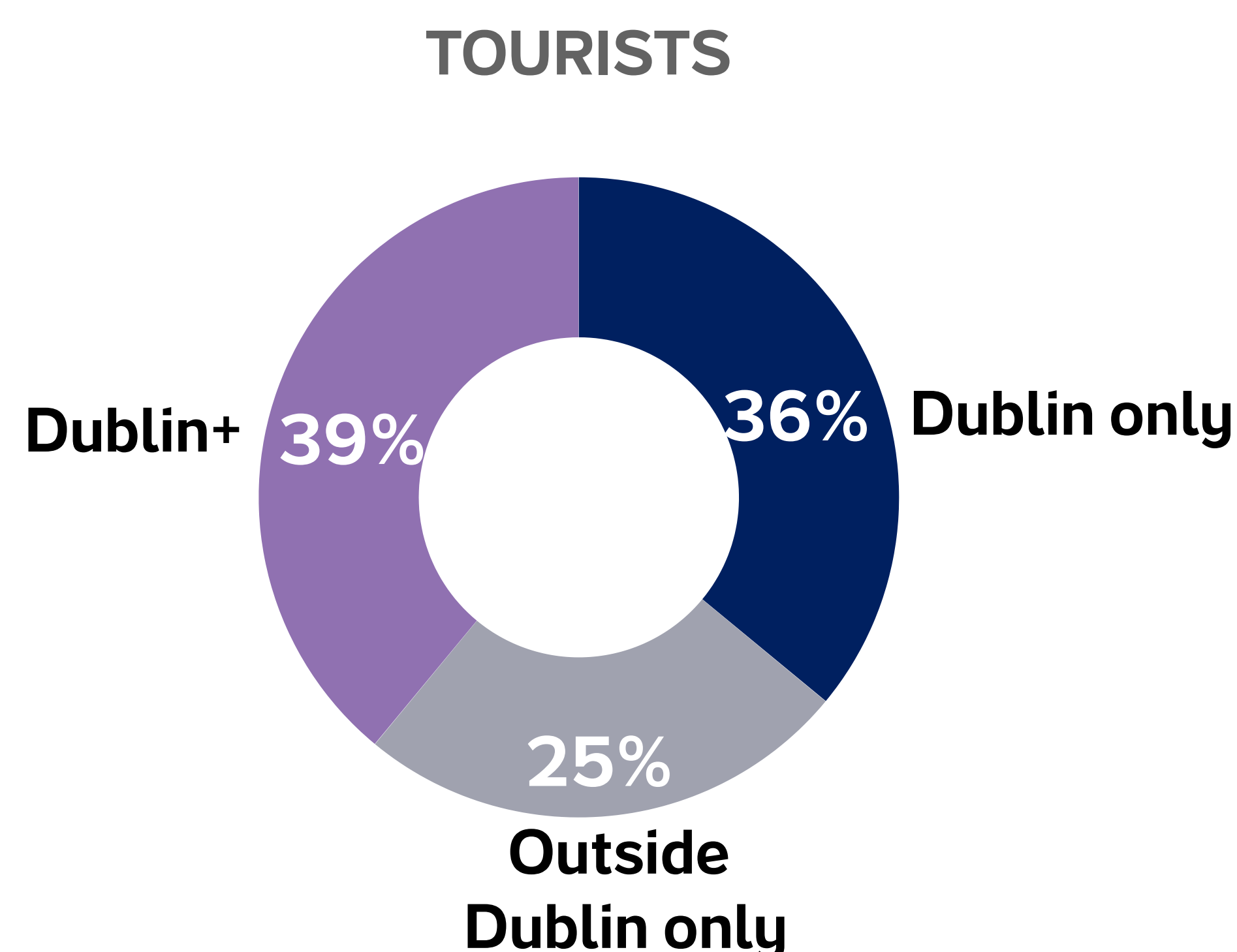
Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	West	West
#3	South-West	South-West



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

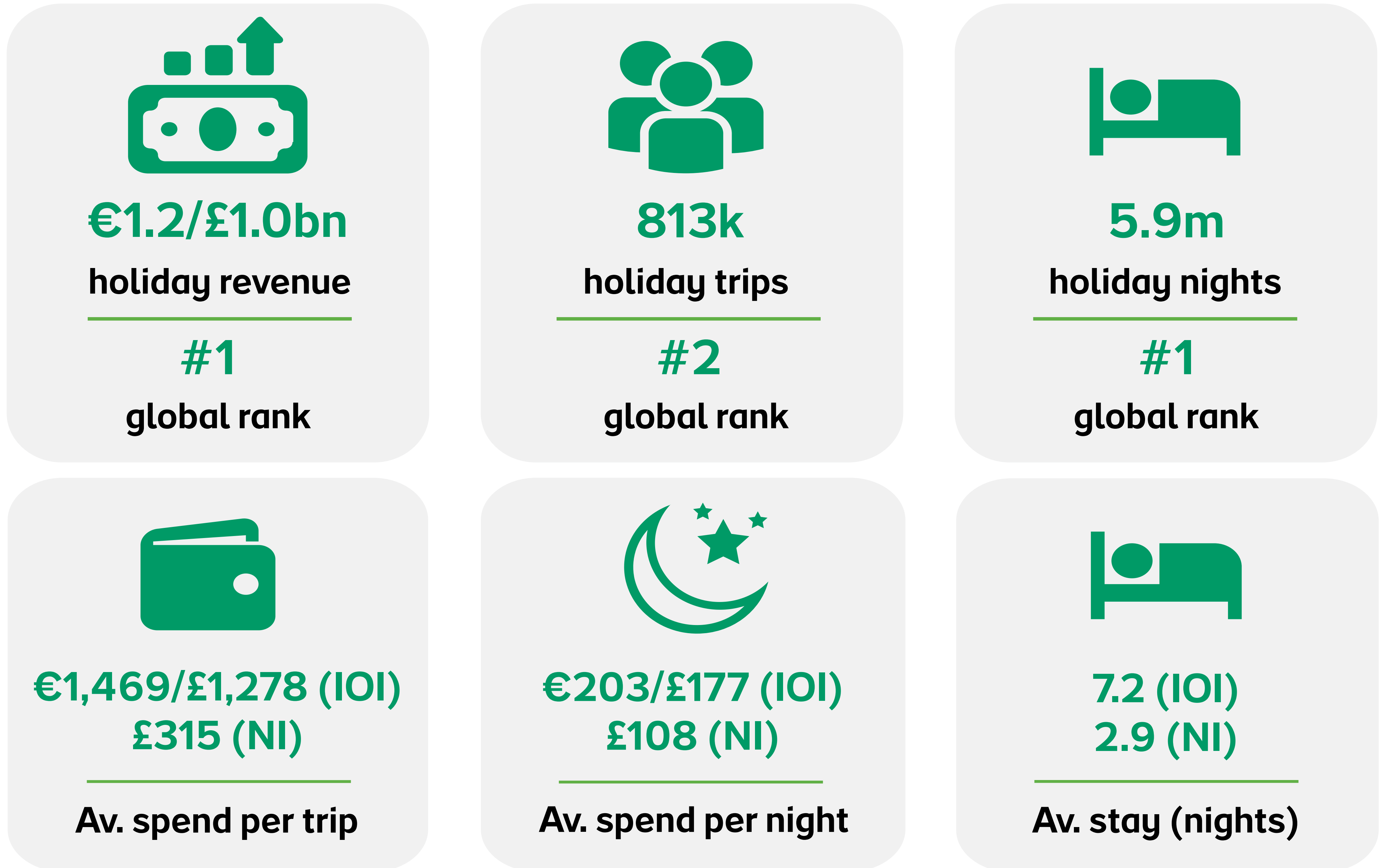
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of American tourists (75%) and holidaymakers (83%).



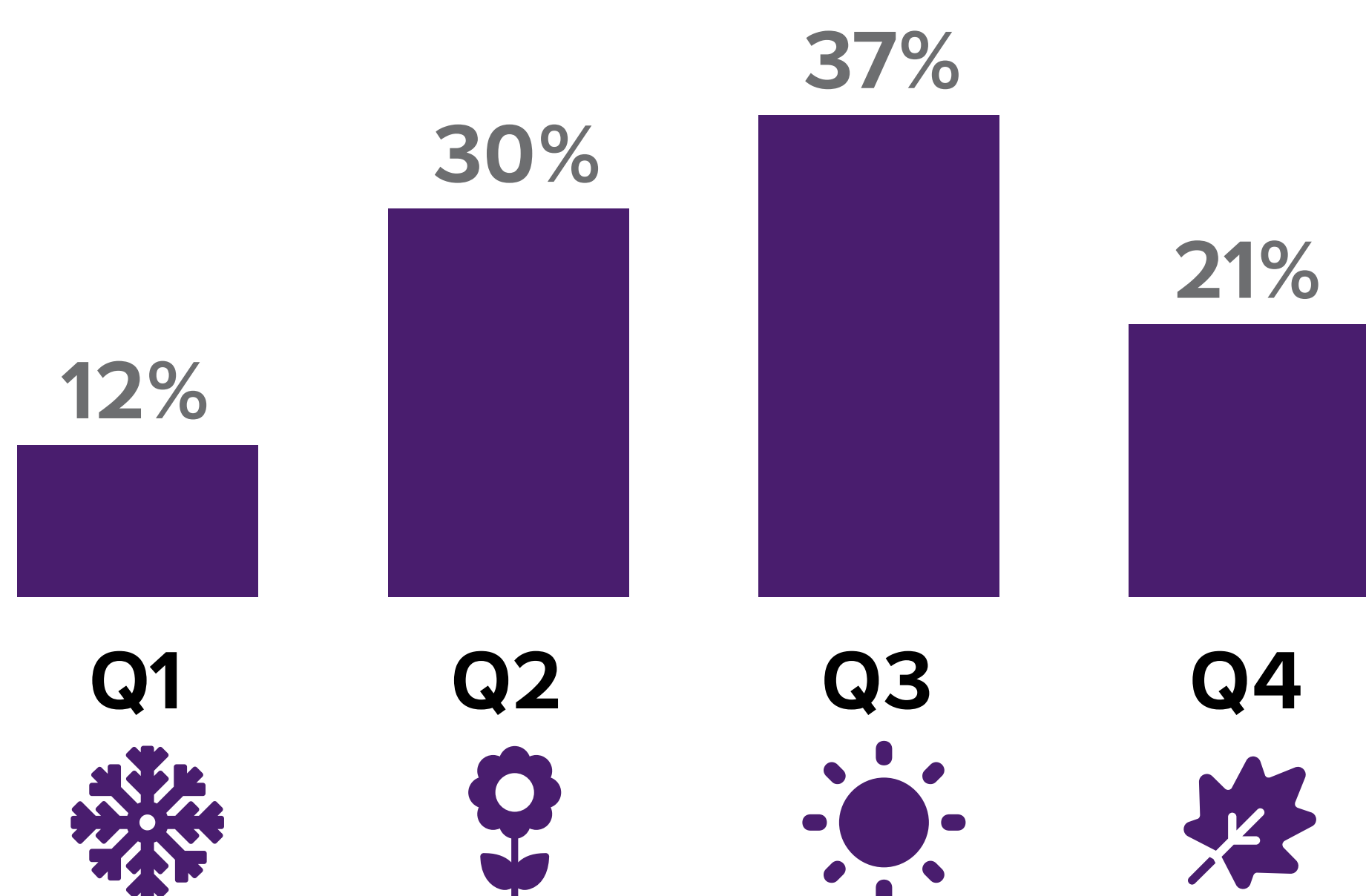
INBOUND HOLIDAYMAKERS

The US was the island of Ireland’s largest source of overseas holiday revenue (39%) and holiday nights (29%), and the second-largest source of holidaymakers (26%). American holidaymakers typically spend more per night (€203/£177) than the average overseas holidaymaker (€150/£130) on the island of Ireland.



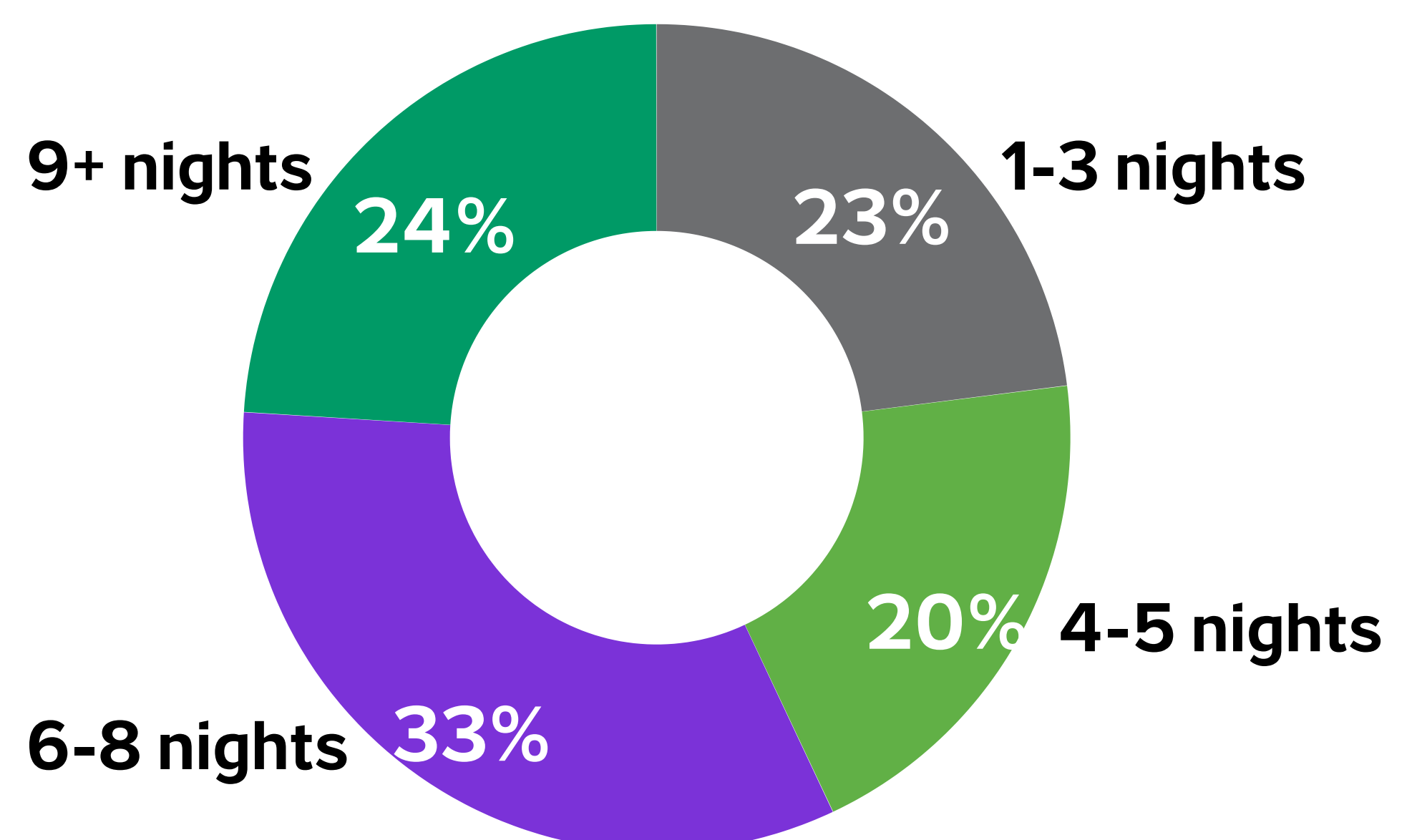
WHEN DID OUR HOLIDAYMAKERS VISIT?

Two-thirds (67%) of American holidaymakers visited during Q2 and Q3 (April - September).



HOW LONG DID OUR HOLIDAYMAKERS STAY?

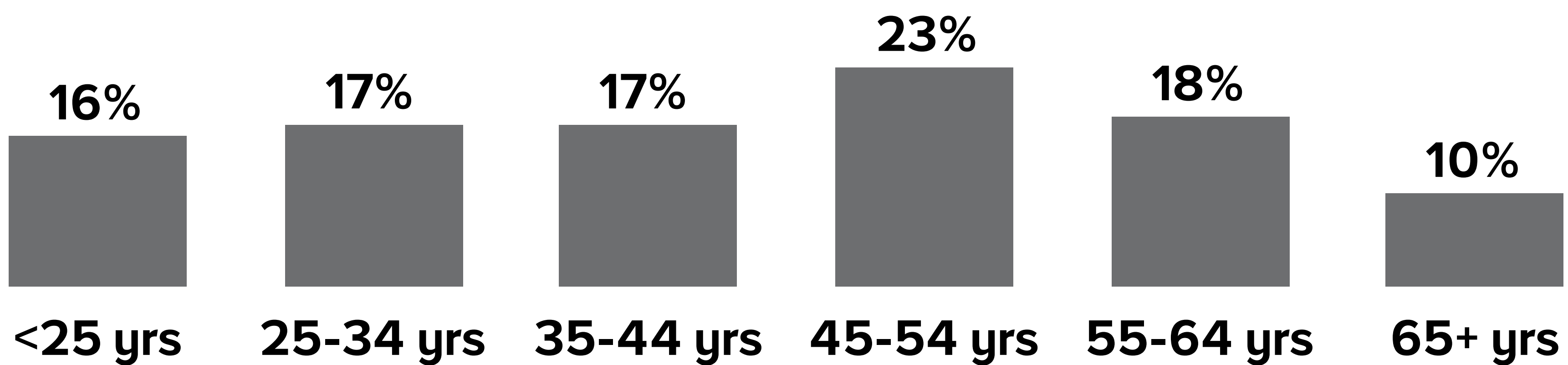
The majority (77%) of American holidaymakers stayed four or more nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

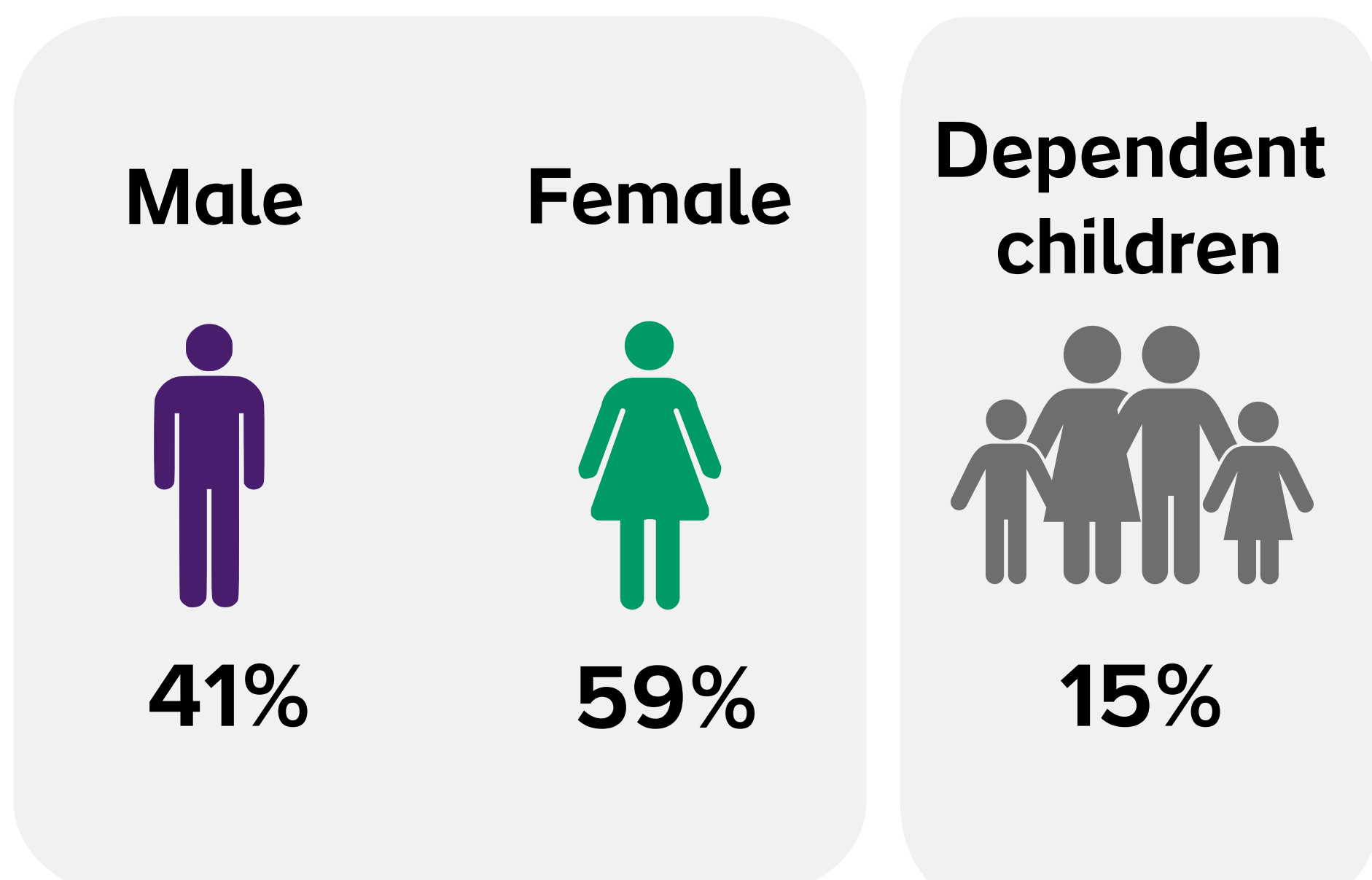
WHAT AGE WERE OUR HOLIDAYMAKERS?

Around two-in-five (39%) American holidaymakers were 35 - 54 years old.



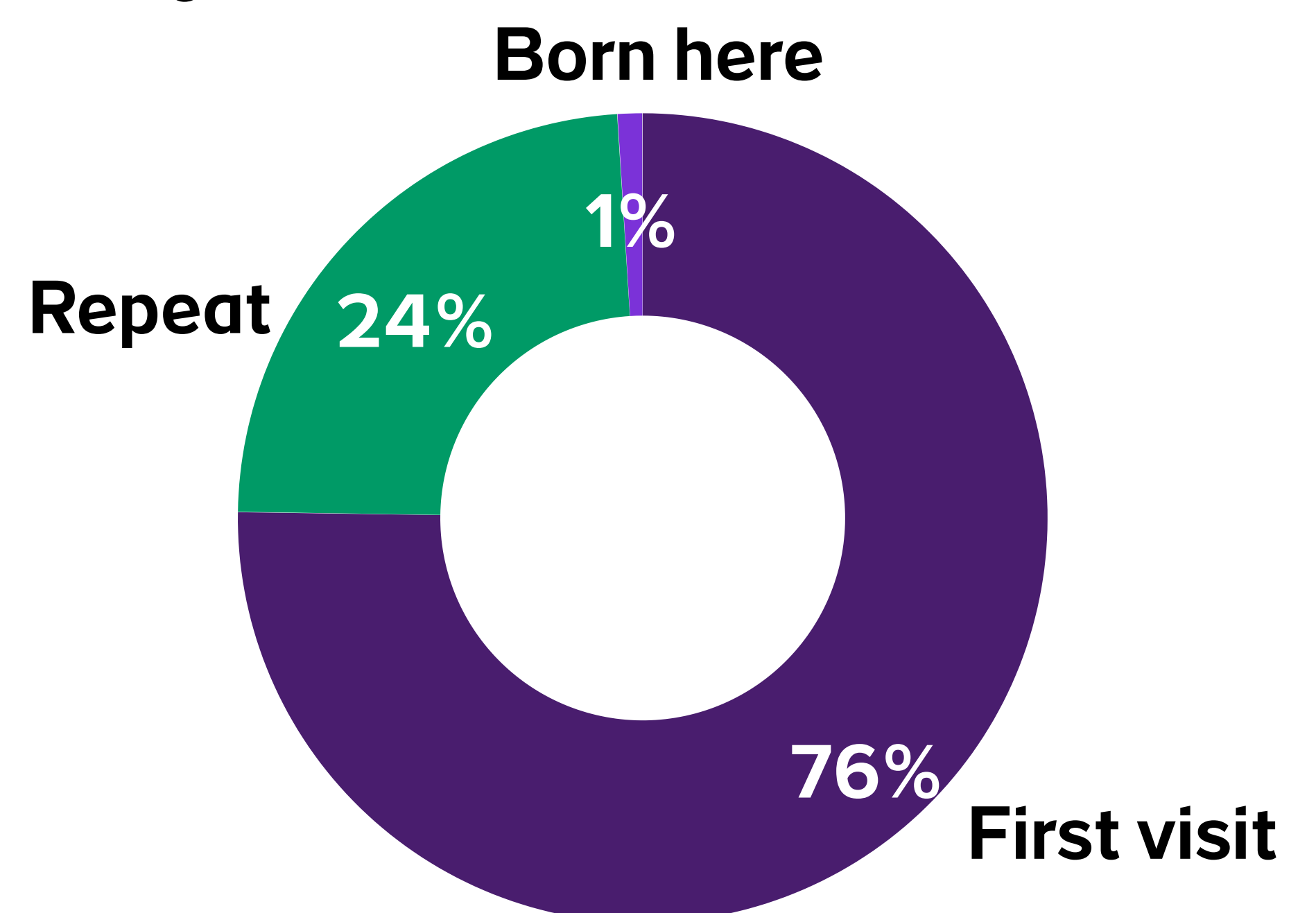
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

A minority (15%) of American holidaymakers visiting the island of Ireland had dependent children in the household (whether empty nesters or pre-children).



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

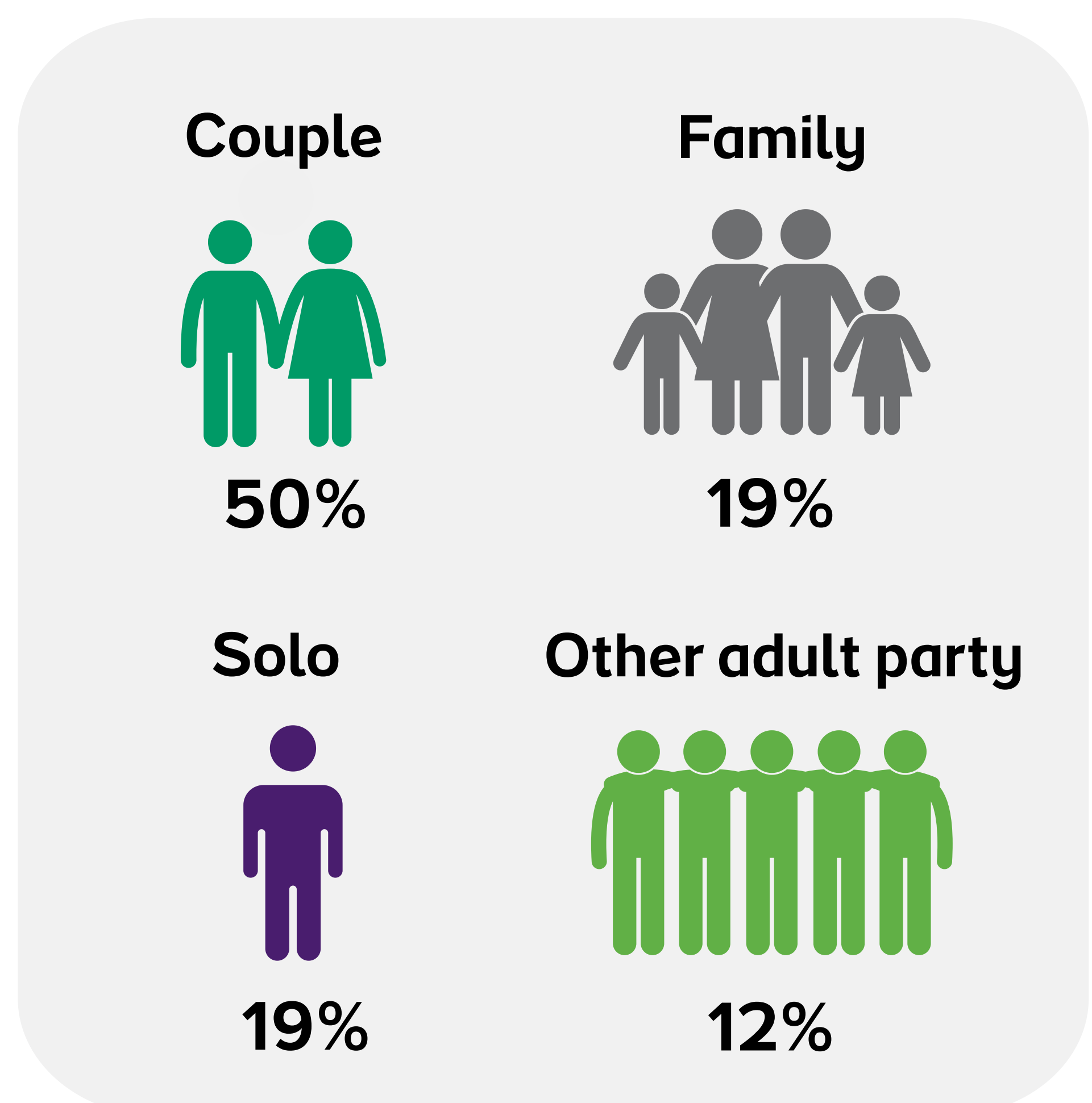
It was a first visit to the island of Ireland for over three-quarters (76%) of American holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Half (50%) of American holidaymakers visited with their partner/spouse.

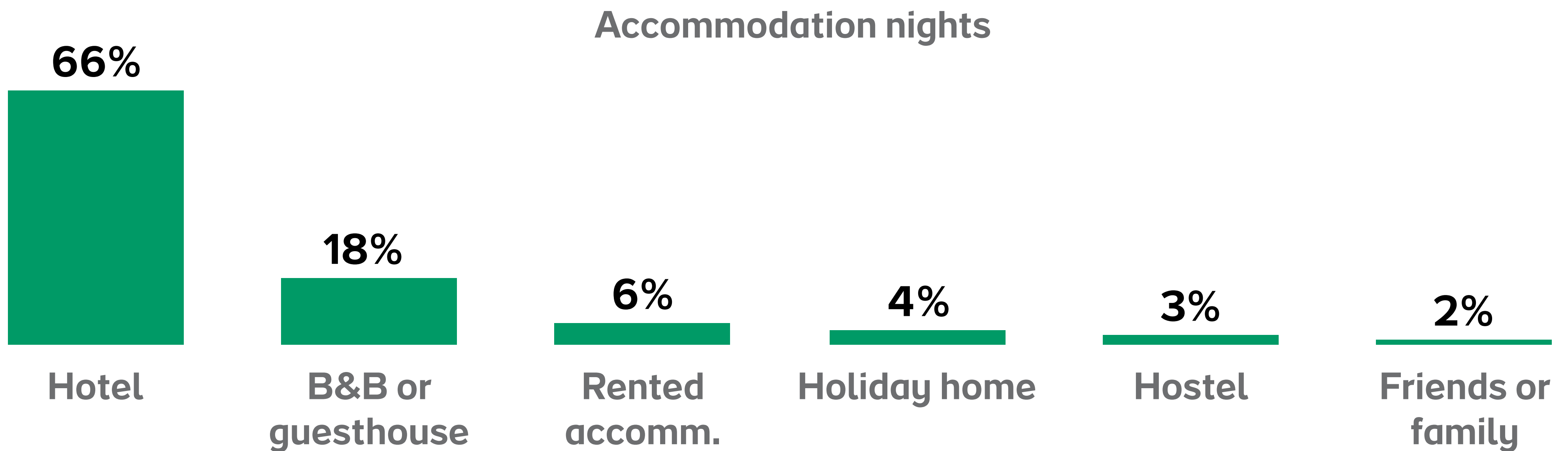
One-fifth visited with their family (19%) which was driven by those visiting with adult family members (13%). One-fifth (19%) travelled alone.



INBOUND HOLIDAYMAKERS

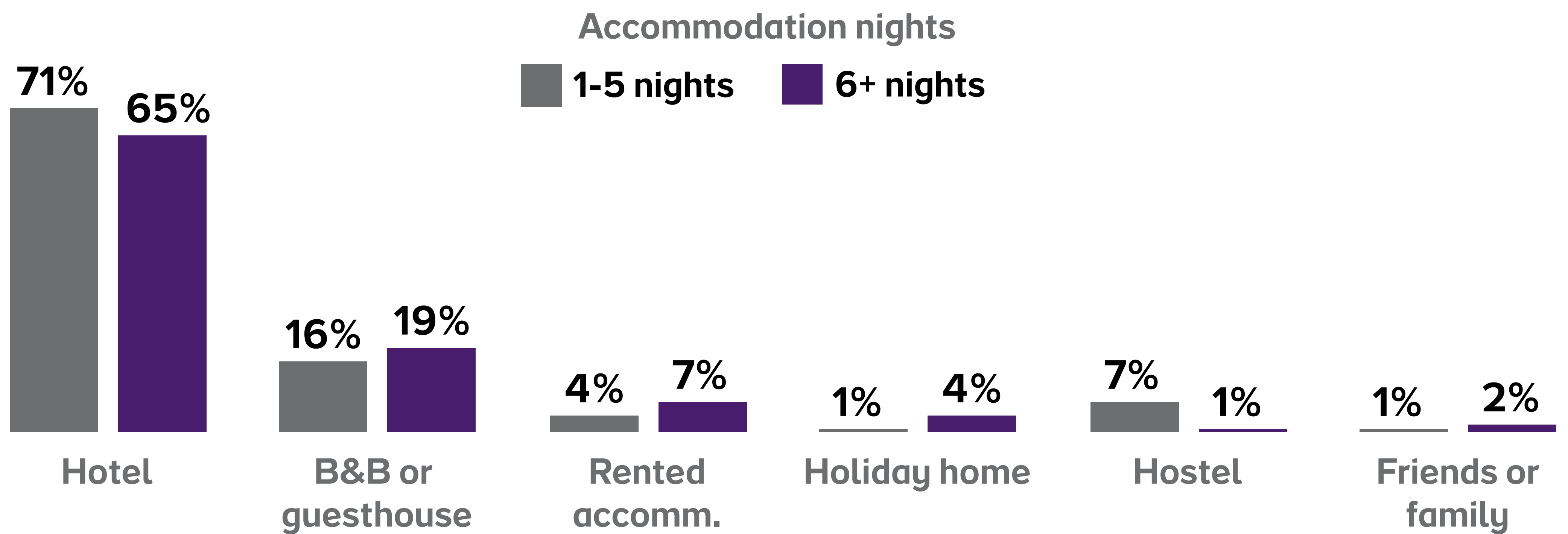
WHERE DID OUR HOLIDAYMAKERS STAY?

Two-thirds (66%) of nights stayed by US holidaymakers were in hotels, while nearly one-fifth (18%) of nights were spent in B&Bs and/or guesthouses.



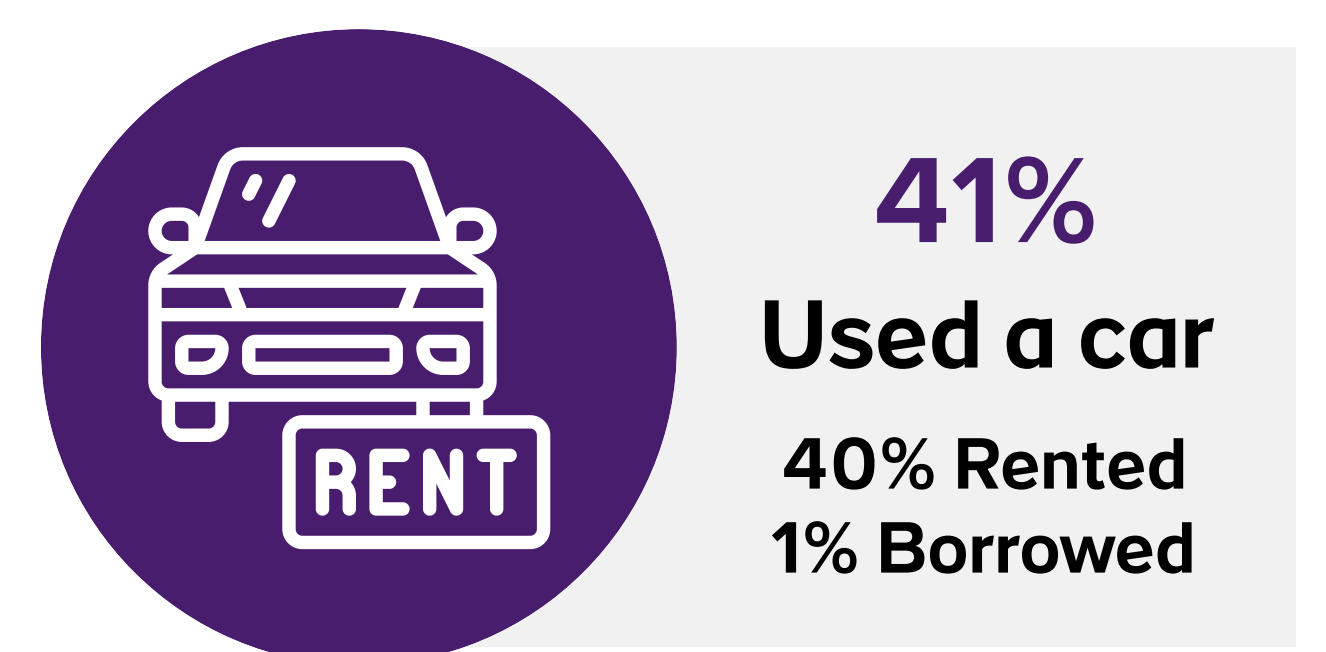
HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?

Hotels (71%) are slightly more popular among US holidaymakers on short breaks (1 - 5 nights), while B&Bs or guesthouses (19%), rented accommodations (7%) and holiday homes (4%) were more popular among those staying 6+ nights.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

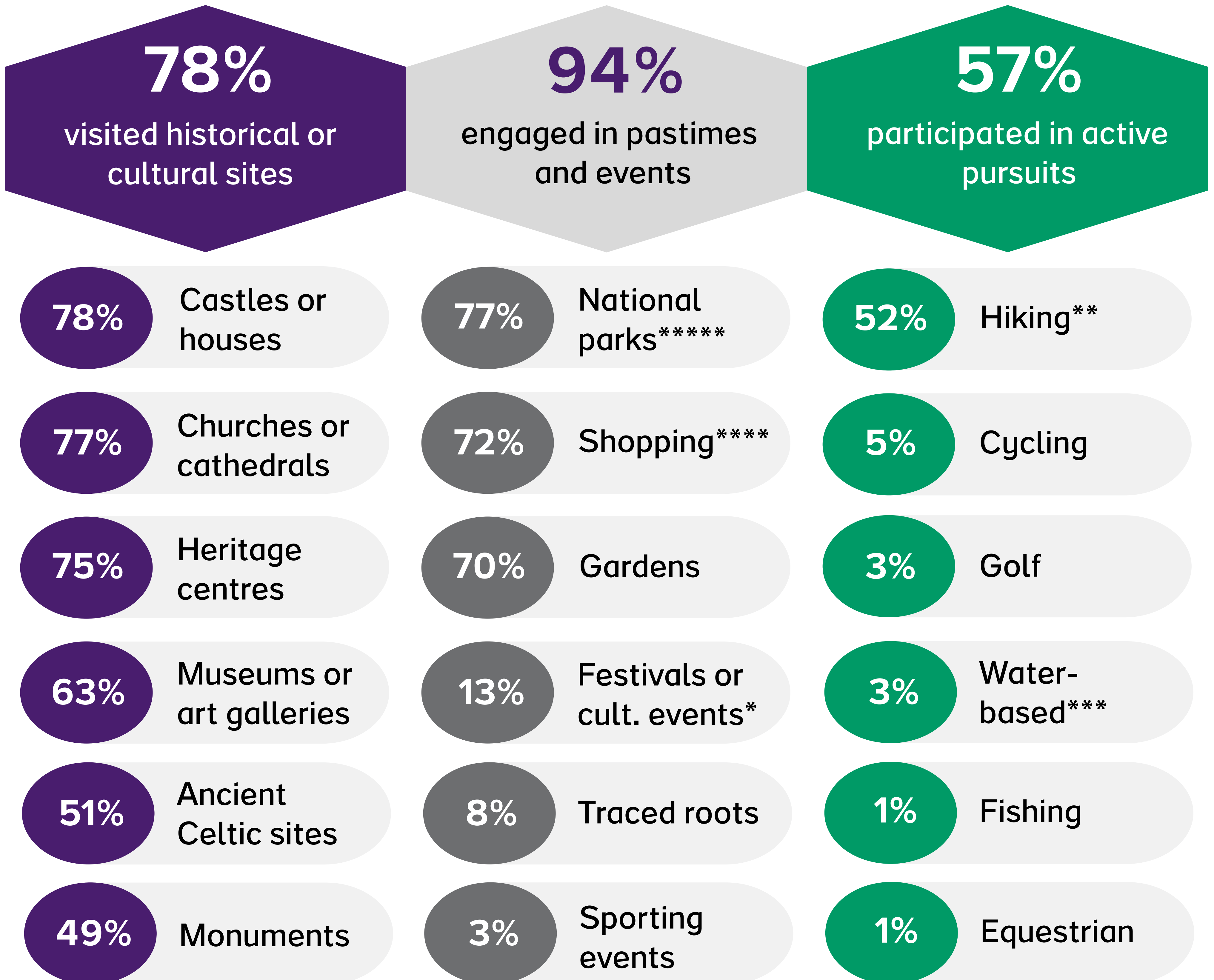
The majority (82%) of US holidaymakers travelled independently and around two-fifths (41%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

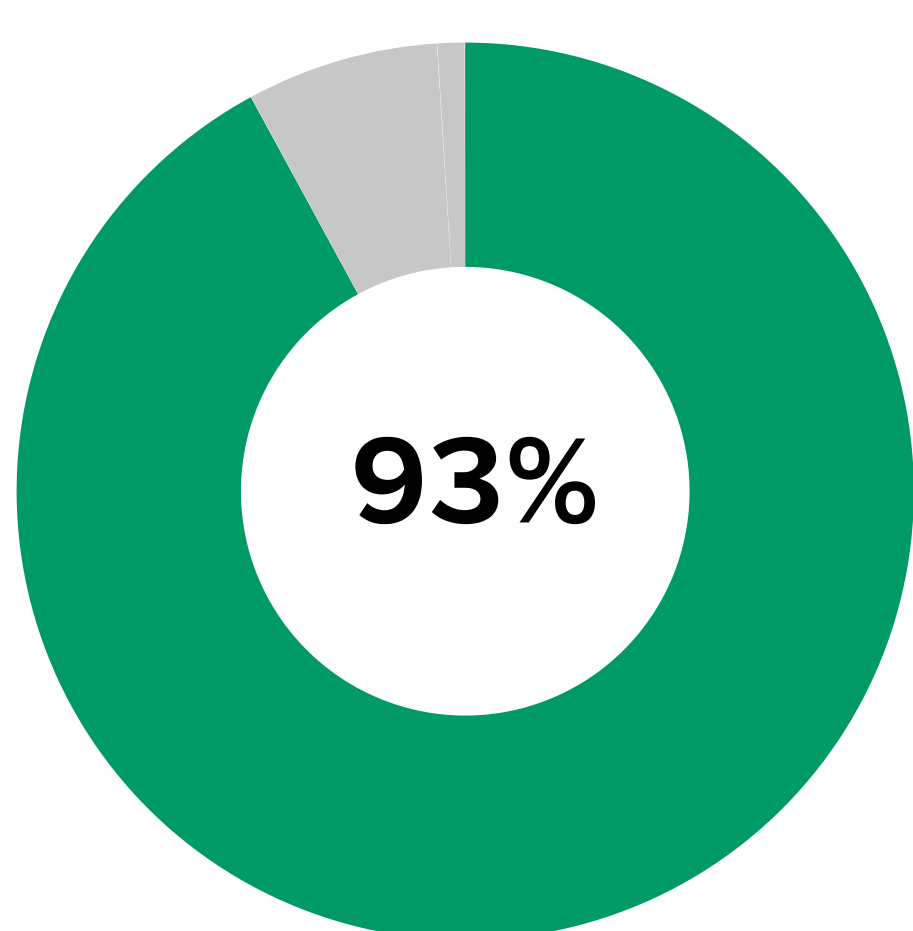
American holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



*incl. concerts | **incl. cross country walking | ***excl. fishing and swimming | ****excl. food/drink/souvenirs | *****incl. forests

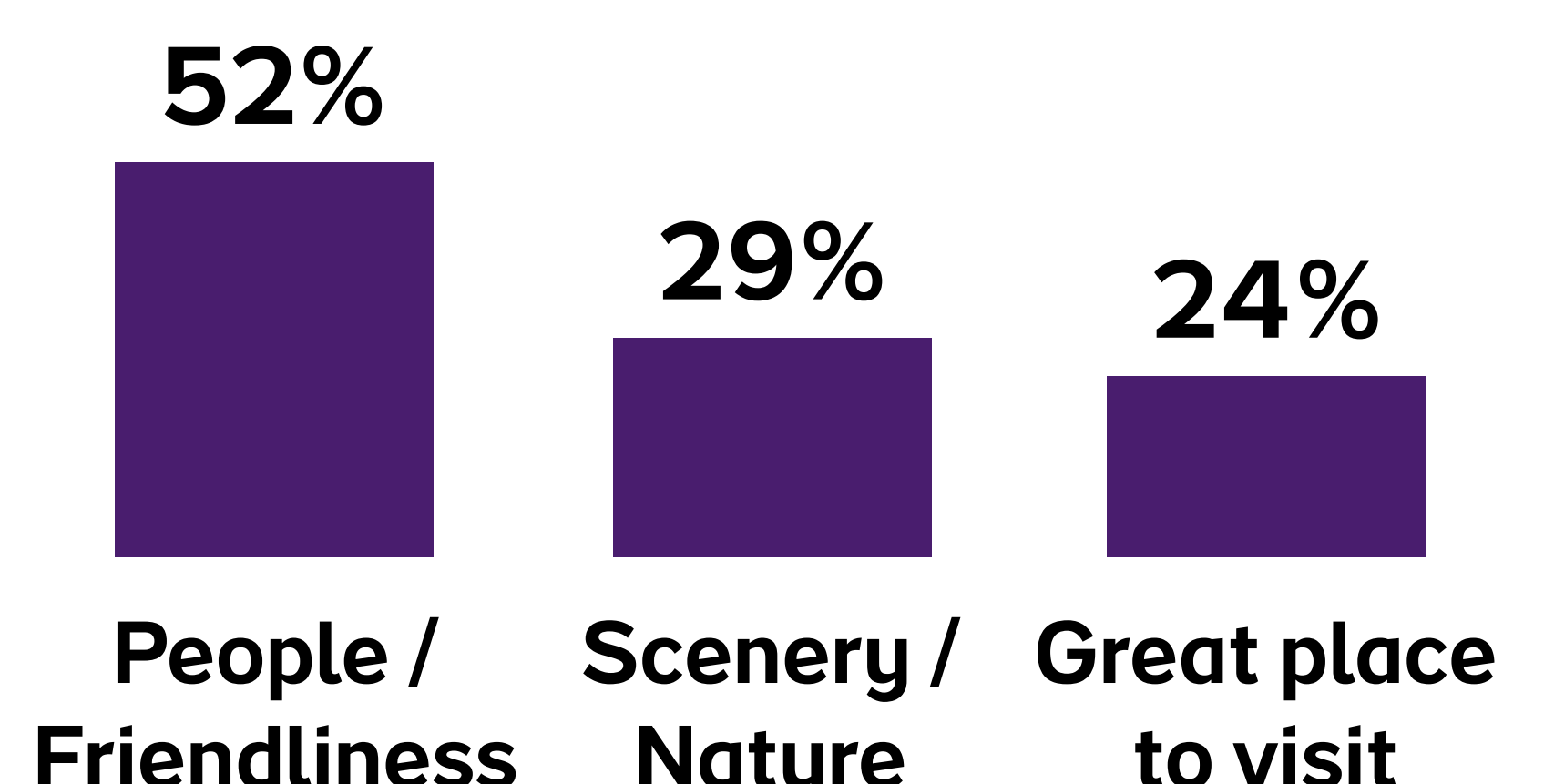
LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS

The vast majority (93%) of US holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (52%), our scenery and nature (29%) and that it's generally a great place to visit (24%).



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

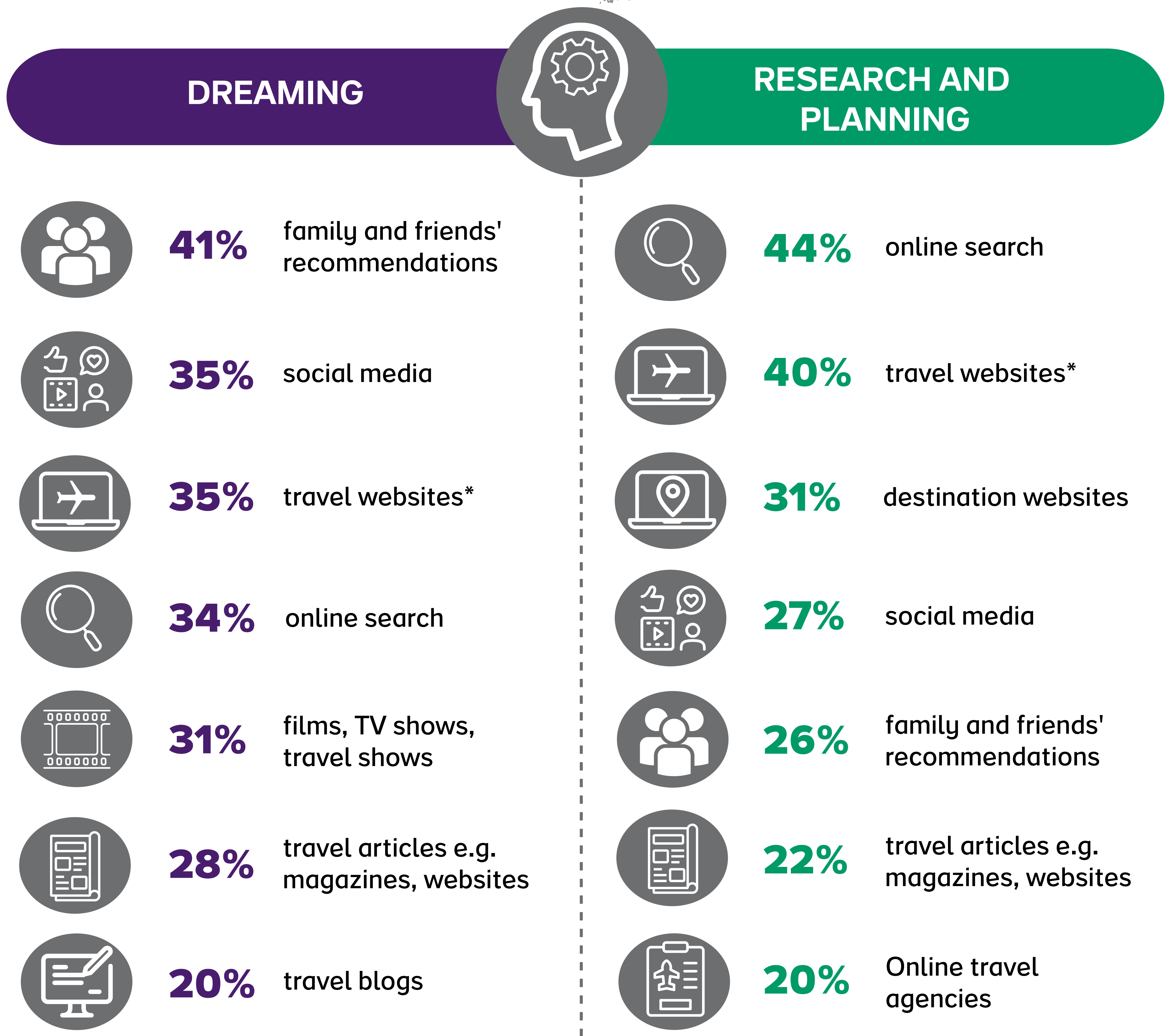
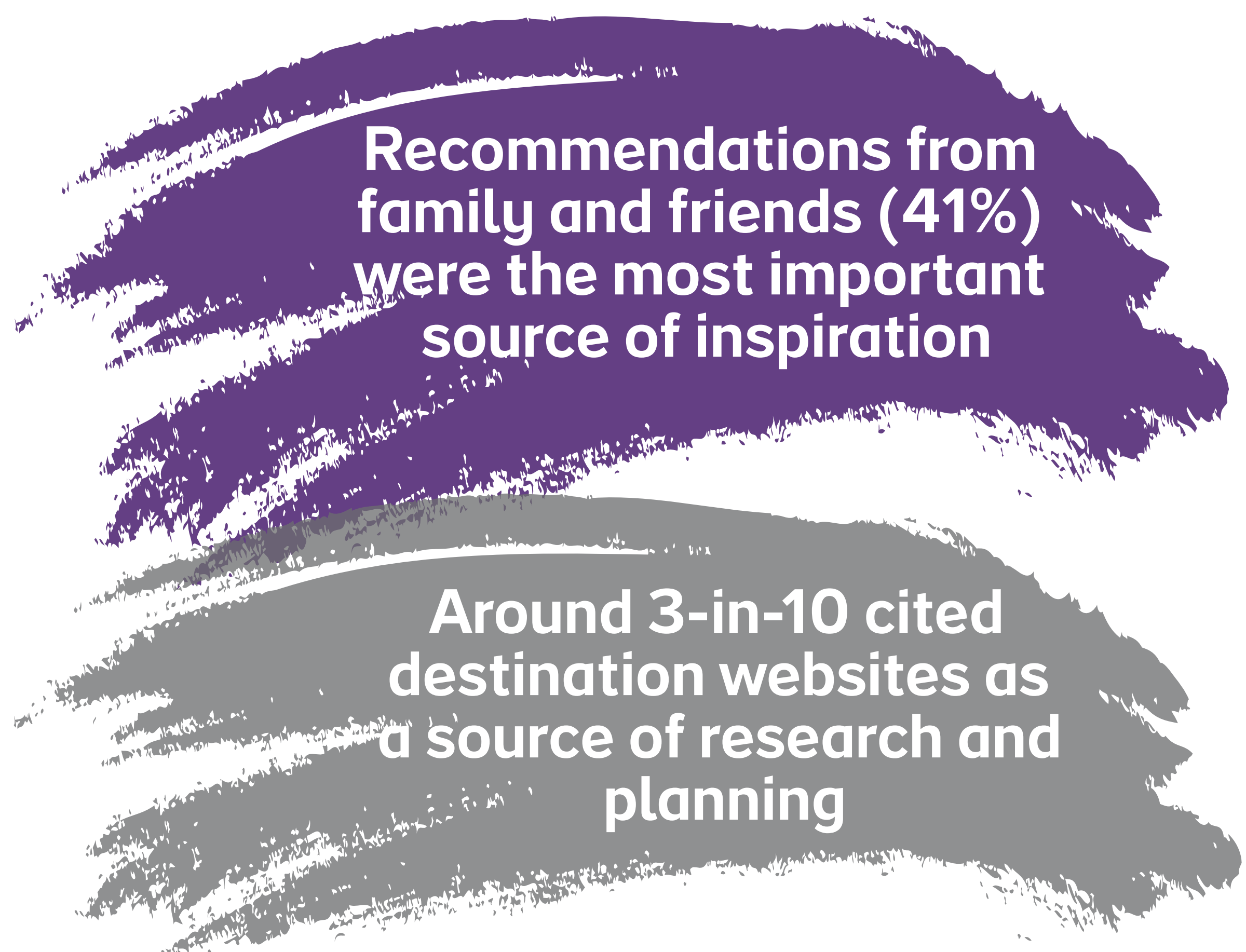


OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from 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.

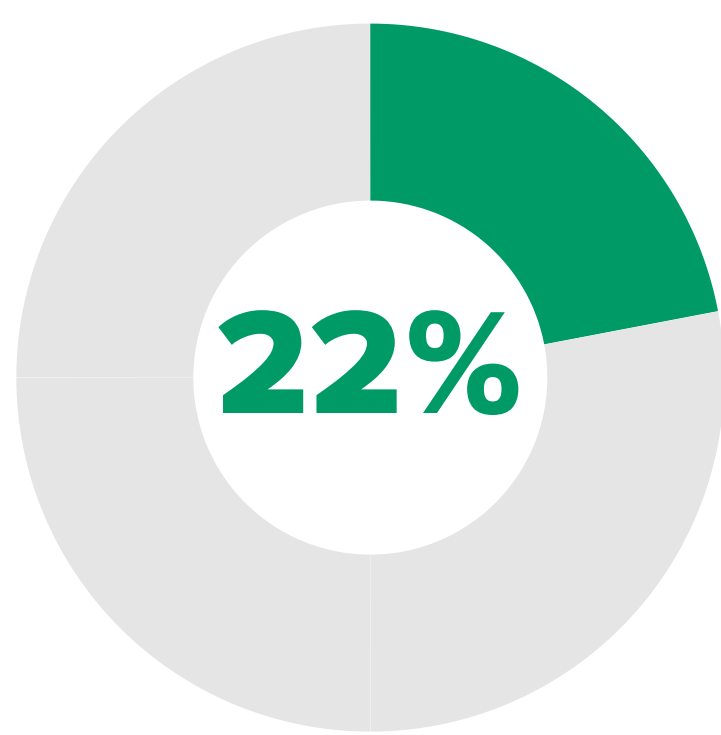
While social media, for example, is cited in its own right, it's often also a channel for the discovery of travel articles and recommendations.



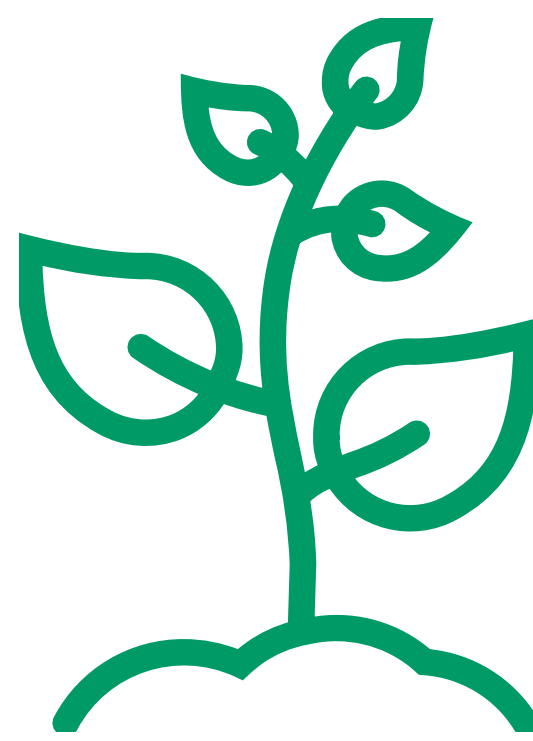
*Travel websites include company websites and booking platforms

ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



of US 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 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

TOP 10 HOLIDAY NEEDS

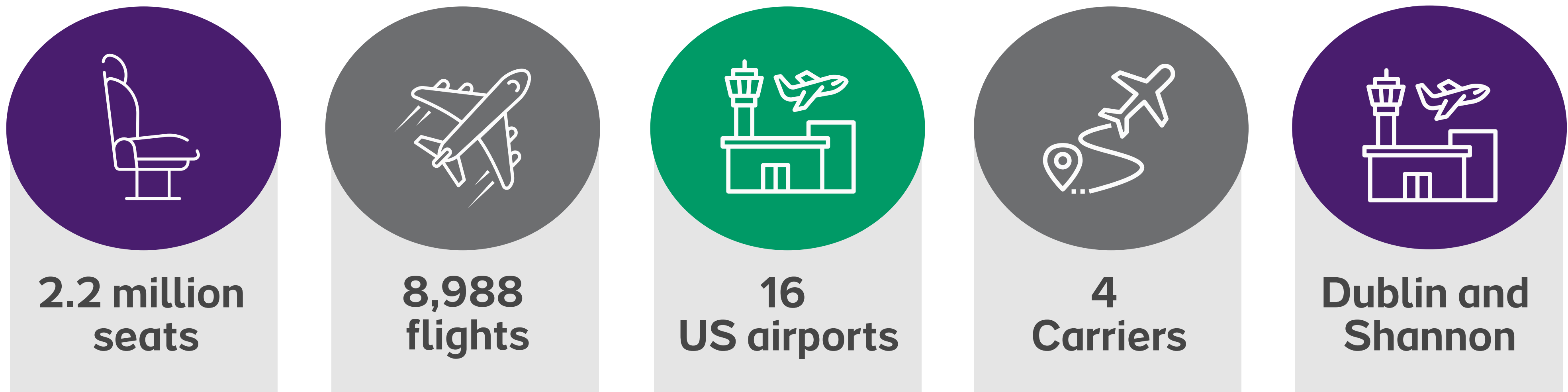
- 1  To feel connected to nature
- 2  To broaden and stimulate my mind
- 3  To feel the character of the place and people
- 4  To appreciate historical/modern architecture
- 5  To experience the vibrancy of the place and people
- 6  To experience living like a local
- 7  To enjoy authentic moments with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

The US was the world's second-largest outbound market in 2023 and 31% of all outbound trips from the US were to Europe.

ACCESS

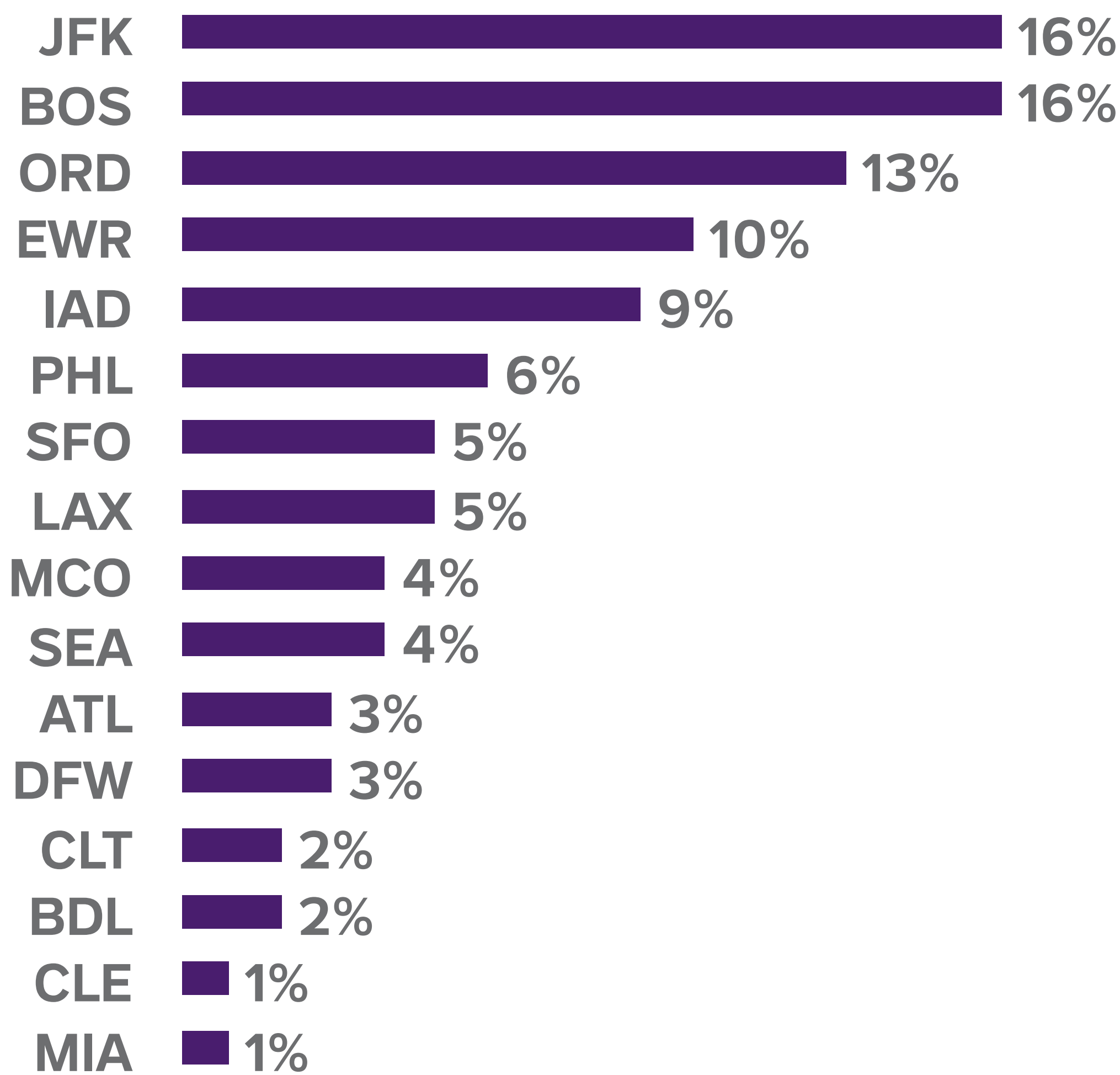
There were 2.2 million direct one-way air seats available on almost 9,000 flights from the US to the island of Ireland in 2023. There were 16 gateways from the US to airports on the island of Ireland.



WHERE CAN OUR TOURISTS FLY FROM?

The top five US airports (John F. Kennedy, Boston, Chicago, Newark and Washington) accounted for the majority (64%) of seats in 2023.

Share of seats by airport



JFK: New York J F Kennedy, BOS: Boston Logan, ORD: Chicago O'Hare, EWR: Newark Liberty, IAD: Washington Dulles, PHL: Philadelphia, SFO: San Francisco, LAX: Los Angeles, MCO: Orlando, SEA: Seattle-Tacoma, ATL: Atlanta Hartsfield-Jackson, DFW: Dallas Fort Worth, CLT: Charlotte, BDL: Hartford Bradley, CLE: Cleveland Hopkins, MIA: Miami

WHO CAN OUR TOURISTS FLY WITH?

Four carriers operated between the US and the island of Ireland. Aer Lingus delivered two-thirds (66%) of all seats from the US to the island of Ireland in 2023.

Share of seats by carrier

