

USA Market Profile 2024

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USA Market Profile 2024

The island of Ireland welcomed 1.3 million American tourists who spent €2.0/£1.7 billion and stayed 11.4 million nights in 2024. The US was the island's largest source of overseas revenue, second-largest source of nights and tourists.

INBOUND TOURISTS

revenue €2.0/£1.7bn, global rank: #1

trips 1.3m, global rank: #2

nights 11.4m, global rank: #2

WHERE DID OUR TOURISTS COME FROM?

Half of American tourists came from the South (25%) and the West (25%).

- West 25%
- Mid-Atlantic 21%
- South 25%
- Mid-West 19%
- New England 10%

WHERE DID OUR TOURISTS VISIT?

ROI tourists 1,266 thousand

NI tourists 190 thousand

WHEN DID OUR TOURISTS VISIT?

Around two-thirds (65%) of American tourists visited the island during Q2 and Q3 (April - September).

Tourist trips Qtr 1	16%
Tourist trips Qtr 2	30%
Tourist trips Qtr 3	35%
Tourist trips Qtr 4	19%

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

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Two-thirds (67%) of American tourists came to the island for a holiday and they accounted for 72% of US tourism revenue. One-in-five (20%) came to visit friends and relatives.

PoV breakdown	Rev € million	Rev £ million	Rev share	Trips thousand	Trips share	Nights thousand	Nights share
Holiday	1,417	1,233	72%	872	67%	6,490	57%
VFR	226	197	11%	256	20%	2,587	23%
Business	149	130	8%	96	7%	687	6%
Other	182	158	9%	93	7%	1,624	14%

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

On average American tourists spent €1,520/£1,322 per trip or €173/£151 per night (highest spend per night) and stayed 8.8 nights on the island of Ireland in 2024.

On the island of Ireland:

Average spend per trip €1,520 / £1,322

Average spend per night €173 / £151

Average stay 8.8 nights

In Northern Ireland:

Average spend per trip £352 and per night £91

Average stay 3.8 nights

HOW DID OUR TOURISTS SPEND THEIR MONEY?

Over one-third (35%) of American tourists' revenue was spent on food and drink, a further third (33%) was spent on accommodation.

Food & drink	35%
Accommodation	33%
Shopping	13%
Transport	11%
Entertainment	8%
Misc	1%

HOW LONG DID OUR TOURISTS STAY?

The majority (62%) stayed six or more nights on the island of Ireland. Over one-third (35%) of American tourists' revenue was spent on food and drink, a further third (33%) was spent on accommodation.

Length of stay

1-3 nights	18%
4-5 nights	20%
6-8 nights	30%
9+ nights	31%

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-eight tourists (12%) and one-in-seven holidaymakers (14%) overnighed on both sides of the border.

WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

% visited areas	Tourists Holidaymakers
Border	9% of Tourists Holidaymakers 10%
Dublin	68% of Tourists Holidaymakers 78%
Mid West	15% of Tourists Holidaymakers 18%
South East	8% of Tourists Holidaymakers 8%
South West	28% of Tourists Holidaymakers 34%
West	28% of Tourists Holidaymakers 37%
Mid-East & Midlands	9% of Tourists Holidaymakers 9%
Northern Ireland	15% of Tourists Holidaymakers 17%

Top 3 regions: Tourists Holidaymakers

1	Dublin	Dublin
2	West	West
3	South West	South West

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

WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of American tourists (68%) and holidaymakers (78%).

	Tourists	Holidaymakers
Dublin only	35%	33%
Outside Dublin only	32%	22%
DUB+	34%	45%

INBOUND HOLIDAYMAKERS

The US was the island of Ireland's largest source of overseas holiday revenue (40%) and holiday nights (30%), and the second-largest source of holidaymakers (25%). American holidaymakers typically spend more per night (€218/£190) than the average overseas holidaymaker (€163/£141) on the island of Ireland.

- €1.4/£1.2bn holiday revenue, global rank #1
- 872k holiday trips, global rank #2
- 6.5m holiday nights, global rank #1
- €1,625/£1,414 (IOI) Av. spend per trip, £294 in NI
- €218/£190 (IOI) Av. spend per night, £106 in NI
- Av. stay (nights) 7.4 on the island of Ireland, 2.8 in NI

WHEN DID OUR HOLIDAYMAKERS VISIT?

Seven in ten (69%) American holidaymakers visited during Q2 and Q3 (April - September).

Holiday trips Qtr 1	14%
Holiday trips Qtr 2	32%
Holiday trips Qtr 3	36%
Holiday trips Qtr 4	18%

HOW LONG DID OUR HOLIDAYMAKERS STAY?

The majority (81%) of American holidaymakers stayed four or more nights on the island of Ireland.

Hol Length of stay	
1-3 nights	19%
4-5 nights	20%
6-8 nights	35%
9+ nights	26%

WHAT AGE WERE OUR HOLIDAYMAKERS?

American holidaymakers were evenly split 49:51 between under 45 years and 45 years or older.

Holiday age (party)	
< 25 years	12%
25-34 years	22%
35-44 years	15%
45-54 years	17%
55-64 years	19%
65 or older	14%

HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

The majority (58%) of American holidaymakers were female. A minority (10%) of American holidaymakers visiting the island of Ireland had dependent children in the household.

Dependent Children	10%
Party composition - gender	
Male	42%
Female	58%

HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

It was a first visit to the island of Ireland for around three-quarters (73%) of American holidaymakers.

First	73%
Repeat	25%
Born here	1%

WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Half (51%) of American holidaymakers visited with their partner/spouse. One-fifth (19%) travelled alone and a similar proportion visited with other adult party (17%).

Travel party

Couple	51%
Solo	19%
Other adult party	17%
Family	13%

WHERE DID OUR HOLIDAYMAKERS STAY?

Over two-thirds (68%) of nights stayed by US holidaymakers were in hotels, while nearly one-sixth (16%) of nights were spent in B&Bs and/or guesthouses.

Accommodation type Nights

Hotel	68%
Guesthouse / B&B	16%
Rented Accommodation	7%
Holiday home	2%
Friends & family	2%
Other	4%

HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?

There was little difference on share of accommodation nights whether on a short break or longer stay for the majority of American holidaymakers, with the exception of "Other" accommodation types. These were largely due to the larger share of hostel and campervan nights among those stay 1-5 nights.

	1-5 nights	6+ nights
Hotel	68%	68%
Guesthouse / B&B	15%	17%

Rented Accommodation	6%	7%
Holiday home	2%	3%
Friends & family	1%	3%
Other	9%	3%

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

HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

The majority (82%) of US holidaymakers travelled independently and two-fifths (40%) used a car while on the island of Ireland.

Independent travel	82%
Package	18%
Car used	40%
<i>Car hire</i>	38%
<i>Car brought</i>	0%
<i>Car borrowed/other</i>	2%

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.

Any historical or cultural sites 95%

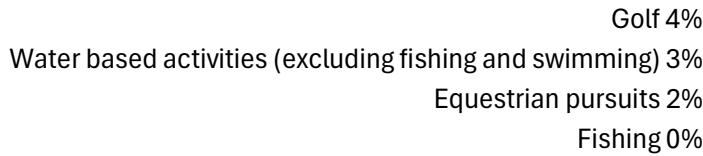
Visitor/heritage centre	75%
Churches or Cathedrals	74%
Historic Houses or Castles	72%
Museums or art galleries	59%
Monuments	54%
Ancient Celtic Sites	43%

Any pastimes & events 93%

Shopping	69%
Visited national parks and forests	67%
Visited gardens	58%
Attended a festival or cultural event or concert	15%
Traced roots or genealogy	8%
Attended an organised sporting event	2%

Any active pursuits 50%

Hiking / Cross Country Walking	47%
Cycling	4%



Source: Fáilte Ireland's Survey of Overseas Travellers

LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS

The vast majority (94%) of US holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (46%), our scenery and nature (43%) and our rich history (14%).

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 (9 - 10) "highly recommend" 94%

Promoters - Top 3 reasons

The People/Friendliness 49%

Scenery/Beauty of countryside/Nature 35%

Generally good/Great place to visit 17%

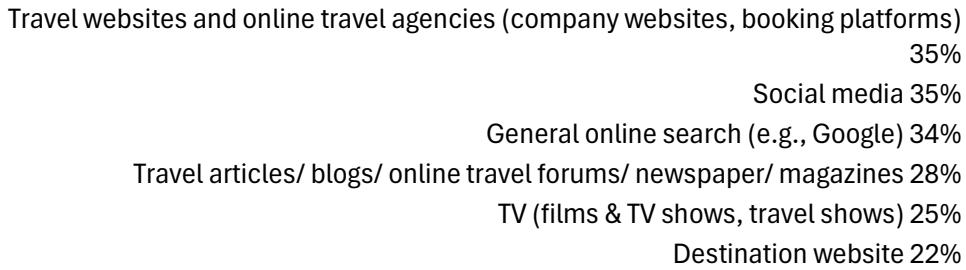
OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

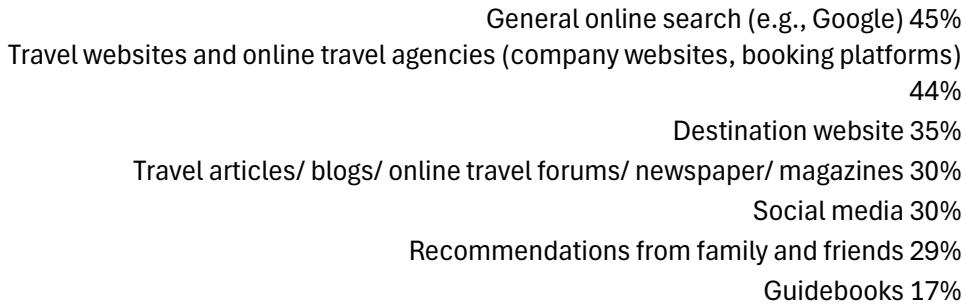
Outbound holidaymakers from the US use multiple sources of inspiration when choosing a holiday destination, including recommendations from family and friends, social media, travel websites, online searches and film and TV shows. While social media, for example, is cited in its own right, it's often also a channel for the discovery of travel articles and recommendations.

Recommendations from family and friends (41%) was the most important source of inspiration. Over 1-in-3 cited destination websites as a source of research and planning.

Inspiration
Recommendations from family and friends 41%



Planning



*Travel websites include company websites and booking platforms

ENRICHMENT EXPLORERS

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.

22% of US outbound holidaymakers

Source: Overseas Holidaymaker Segmentation

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

OUTBOUND TOURISTS

The US was the world's largest outbound market in 2024 and 30% of all outbound trips from the US were to Europe.

ACCESS

There were 2.4 million direct one-way air seats available on over 10,000 flights from the US to the island of Ireland in 2024. There were 20 gateways from the US to airports on the island of Ireland.

Direct one-way seats: 2.4 million

Direct flights: 10,015

Market airports: 20

Carriers: 5

IOI airports: 2

WHERE CAN OUR TOURISTS FLY FROM?

The top five US airports (John F. Kennedy, Boston, Chicago, Newark and Washington) accounted for the majority (62%) of seats in 2024.

Share of seats by market airport (top 10):

JFK, New York J F Kennedy,: 18%

Boston Logan : 15%

Chicago : 12%

Newark : 9%

Washington : 8%

Philadelphia : 6%

San Francisco: 4%

Los Angeles : 4%

Atlanta : 4%

Dallas/Fort Wort: 3%

WHO CAN OUR TOURISTS FLY WITH?

Five carriers operated between the US and the island of Ireland. Aer Lingus delivered almost two-thirds (63%) of all seats from the US to the island of Ireland in 2024.

Share of seats by carrier:

Aer Lingus: 63%

Delta: 12%

American: 11%

United: 11%

JetBlue: 3%

Inbound and profile stats source: CSO, NISRA, Fáilte Ireland's Survey of Overseas Travellers

Access and Outbound Sources: OAG, Oxford Economics