

USA

MARKET PROFILE 2024



INBOUND TOURISTS

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, and the second-largest source of nights and tourists.



WHERE DID OUR TOURISTS COME FROM?

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

SOUTH	WEST	MID-ATLANTIC	MID-WEST	NEW ENGLAND
25%	25%	21%	19%	10%

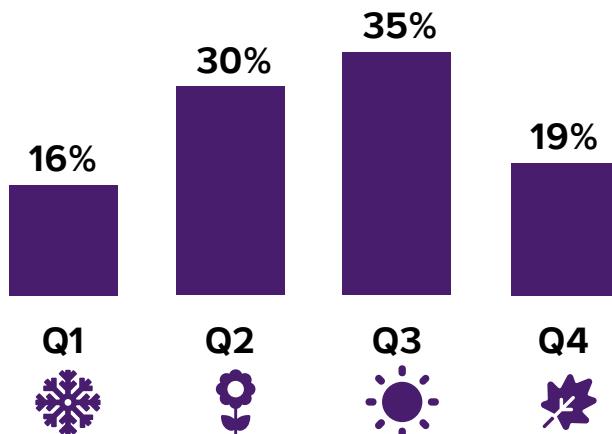
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?

Around two-thirds (65%) 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 72% of US tourism revenue. One-in-five (20%) came to visit friends and relatives.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€1.4/£1.2bn	72%	872k	67%	6.5m	57%
 VFR	€226/£197m	11%	256k	20%	2.6m	23%
 BUSINESS	€149/£130m	8%	96k	7%	687k	6%
 OTHER	€182/£158m	9%	93k	7%	1.6m	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.



€1,520/£1,322 (IOI)
£352 (NI)

Av. spend per trip



€173/£151 (IOI)
£91 (NI)

Av. spend per night

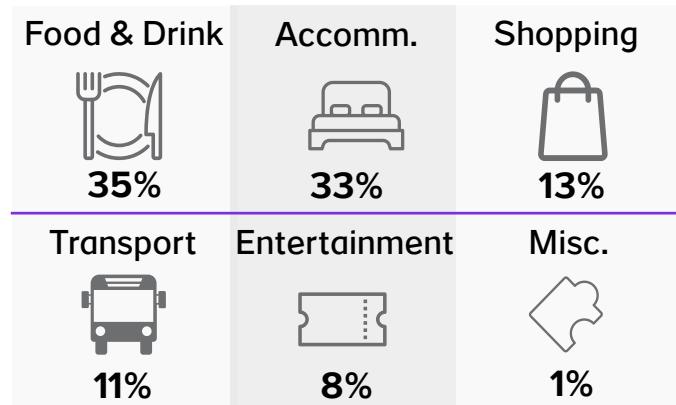


8.8 (IOI)
3.8 (NI)

Av. stay (nights)

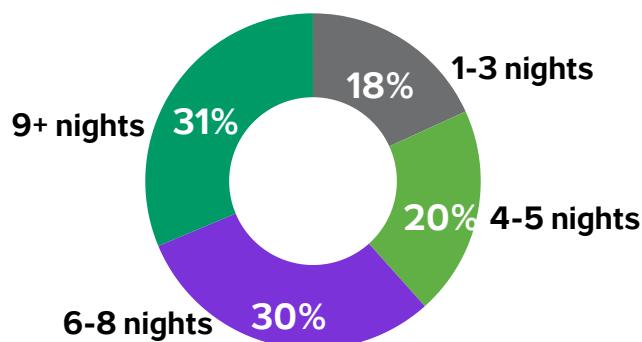
HOW DID OUR TOURISTS SPEND THEIR MONEY?

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



HOW LONG DID OUR TOURISTS STAY?

The majority (62%) stayed six or more nights on the island of Ireland.



INBOUND TOURISTS AND HOLIDAYMAKERS

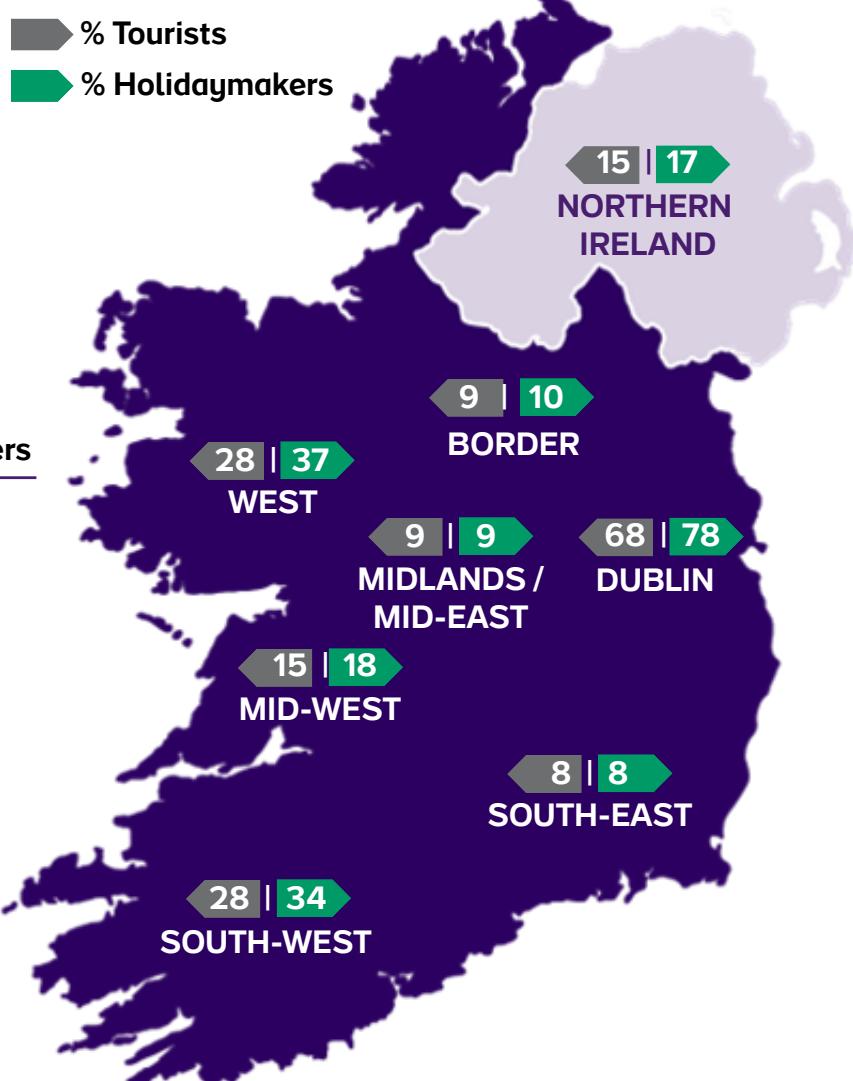
WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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

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

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

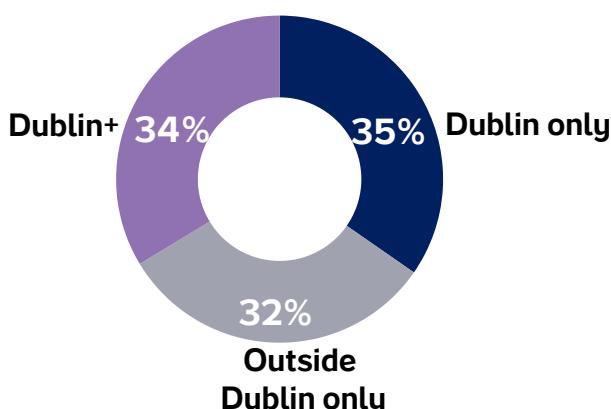
Dublin: Dublin City and County. Midlands / Mid-East: Laois, Longford, Louth, Offaly, Westmeath, Kildare, Meath, Wicklow. South-East: Carlow, Kilkenny, Waterford, Wexford. South-West: Cork, Kerry. Mid-West: Clare, Limerick, Tipperary. West: Galway, Mayo, Roscommon. Border: Cavan, Donegal, Leitrim, Monaghan, Sligo. Northern Ireland: Antrim, Armagh, Down, Fermanagh, Derry/Londonderry, Tyrone



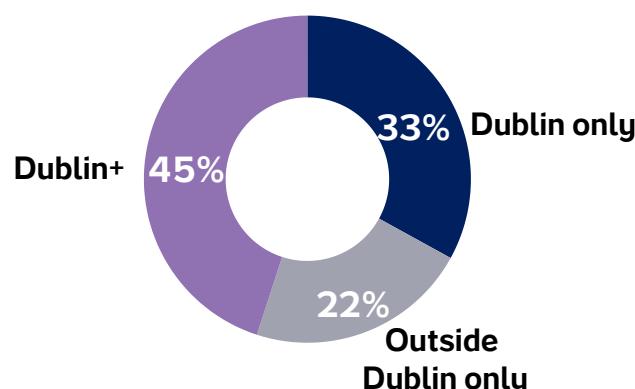
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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

TOURISTS

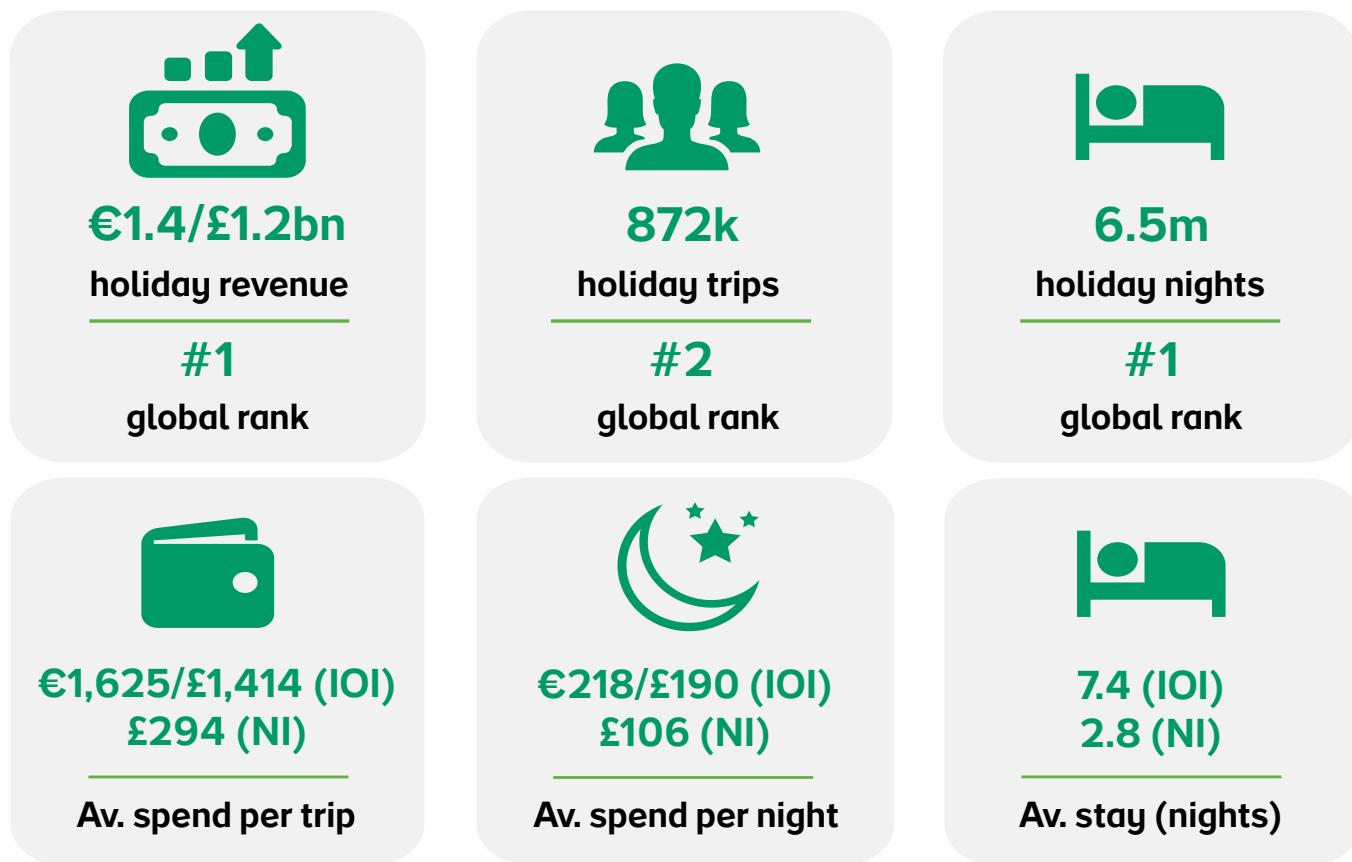


HOLIDAYMAKERS



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.

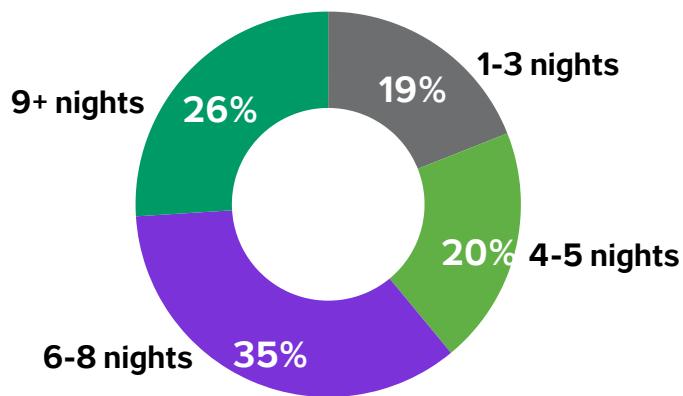
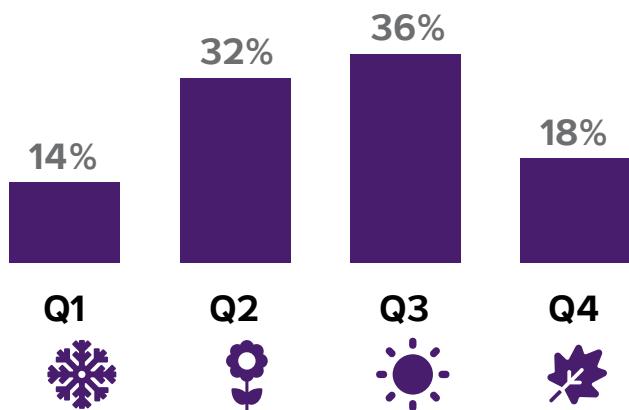


WHEN DID OUR HOLIDAYMAKERS VISIT?

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

HOW LONG DID OUR HOLIDAYMAKERS STAY?

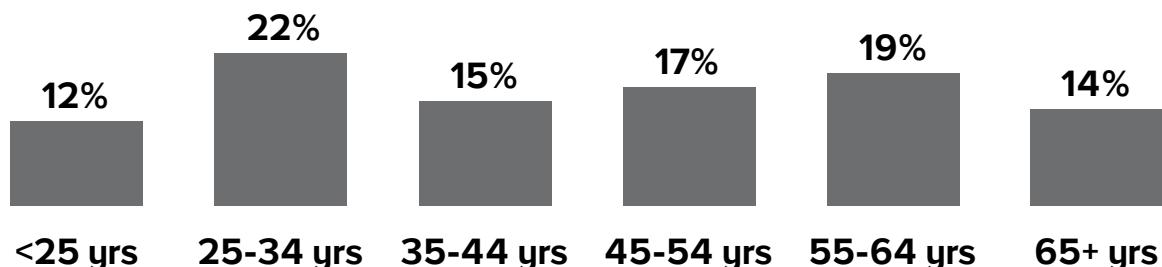
The majority (81%) of American holidaymakers stayed four or more nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

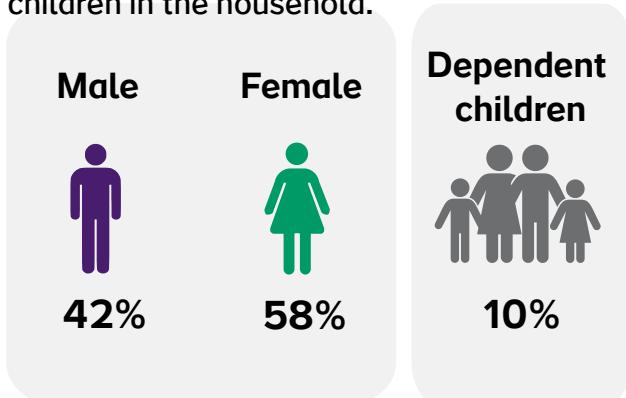
WHAT AGE WERE OUR HOLIDAYMAKERS?

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



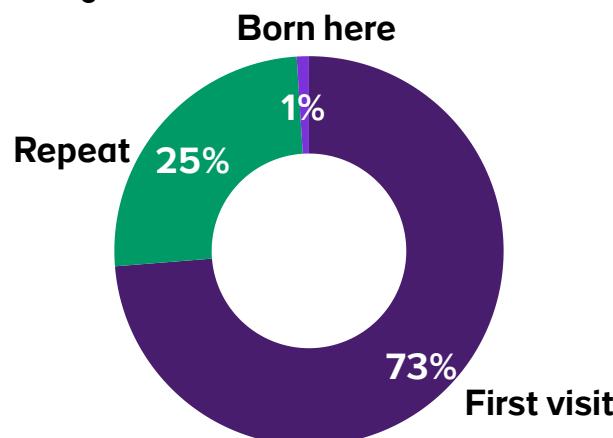
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

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.



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

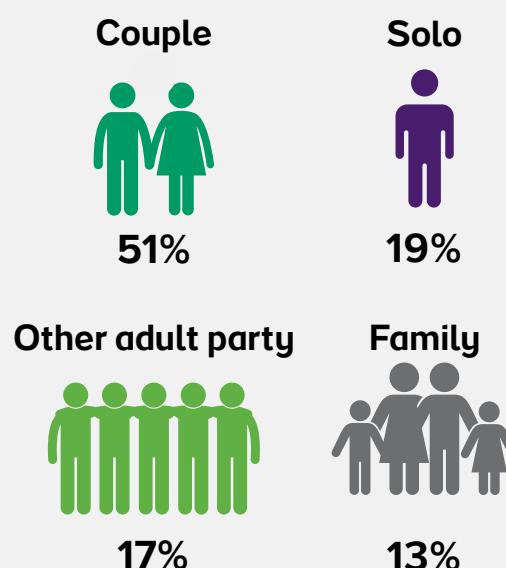
It was a first visit to the island of Ireland for around three-quarters (73%) of American holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Half (51%) of American holidaymakers visited with their partner/spouse.

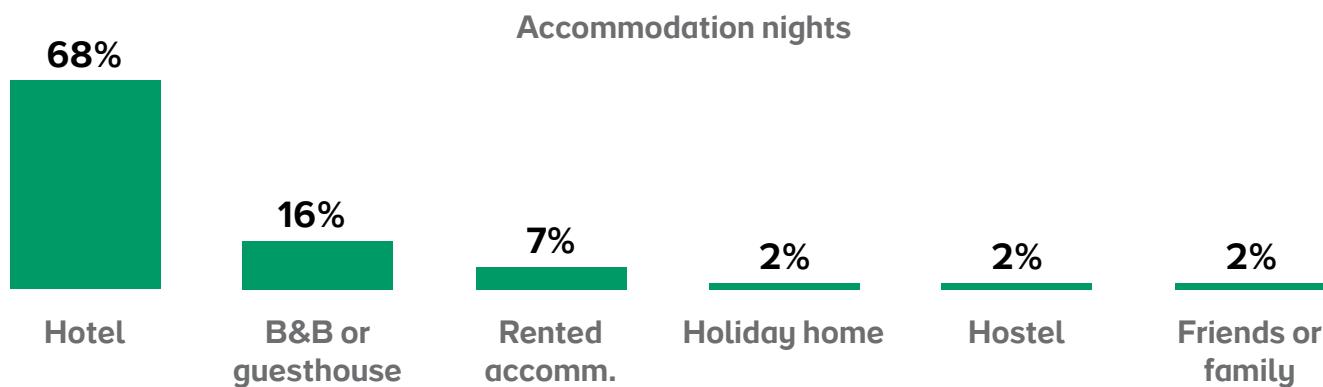
One-fifth (19%) travelled alone and a similar proportion visited with other adult party (17%).



INBOUND HOLIDAYMAKERS

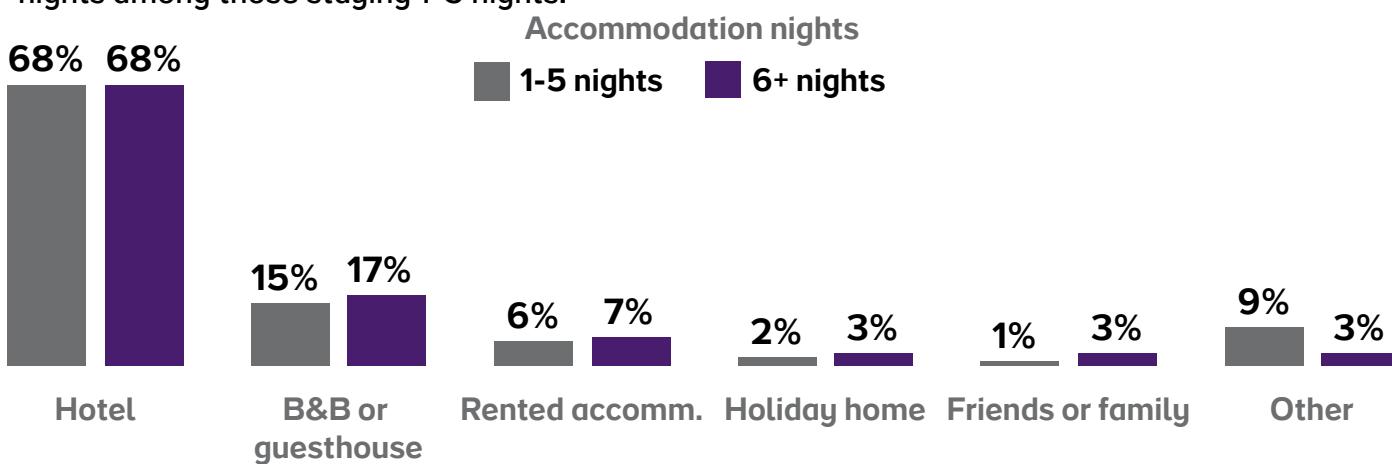
WHERE DID OUR HOLIDAYMAKERS STAY?

Over two-thirds (68%) of US holiday nights spent on the island of Ireland were in hotels, while nearly one-sixth (16%) of nights were spent in B&Bs and/or guesthouses.



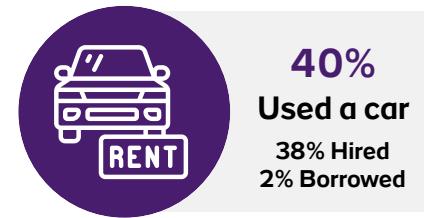
HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?

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 staying 1-5 nights.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

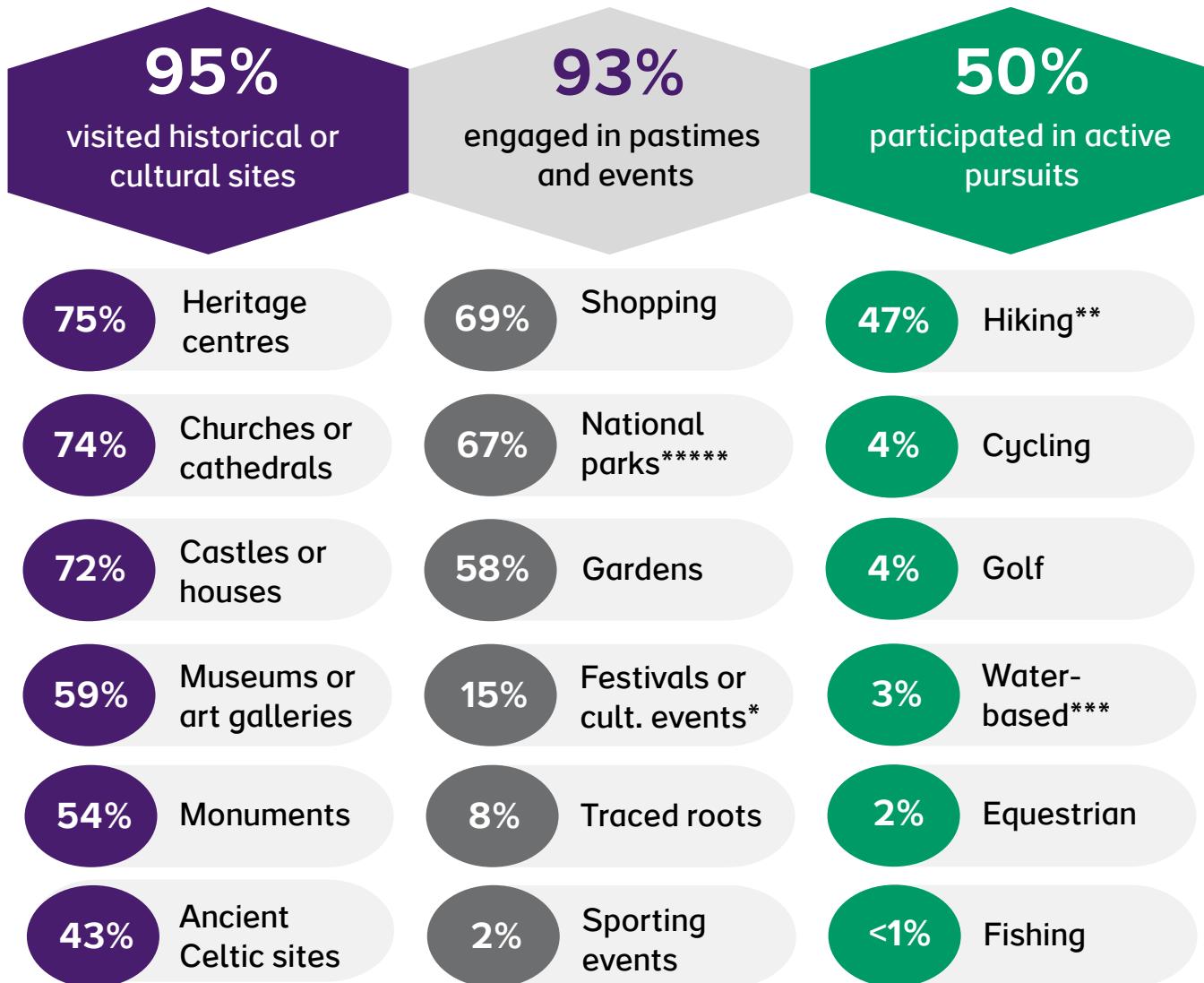
The majority (82%) of US holidaymakers travelled independently and two-fifths (40%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

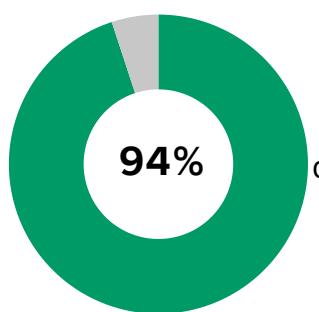
American holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



*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 (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%).

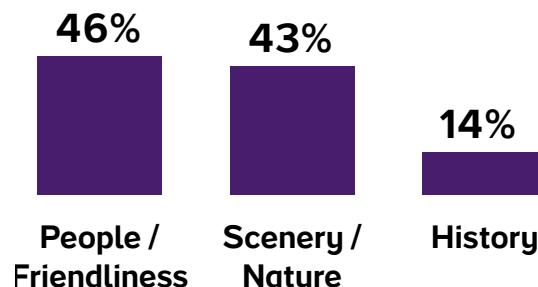


Promoters (9 - 10) "highly recommend"

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.

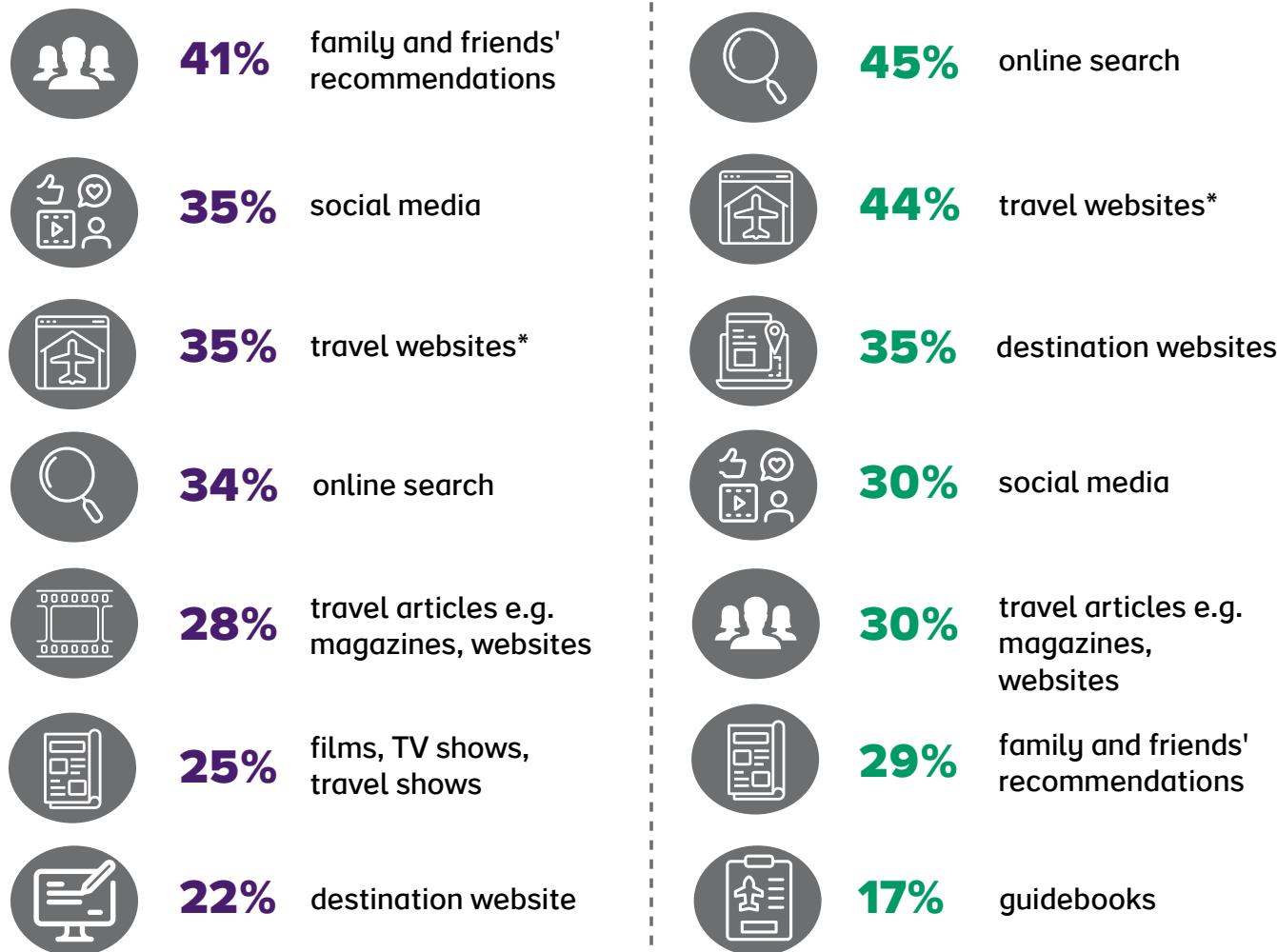
Recommendations from family and friends (41%) was the most important source of inspiration

Over 1-in-3 cited destination websites as a source of research and planning

DREAMING



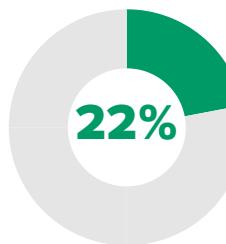
RESEARCH AND PLANNING



*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

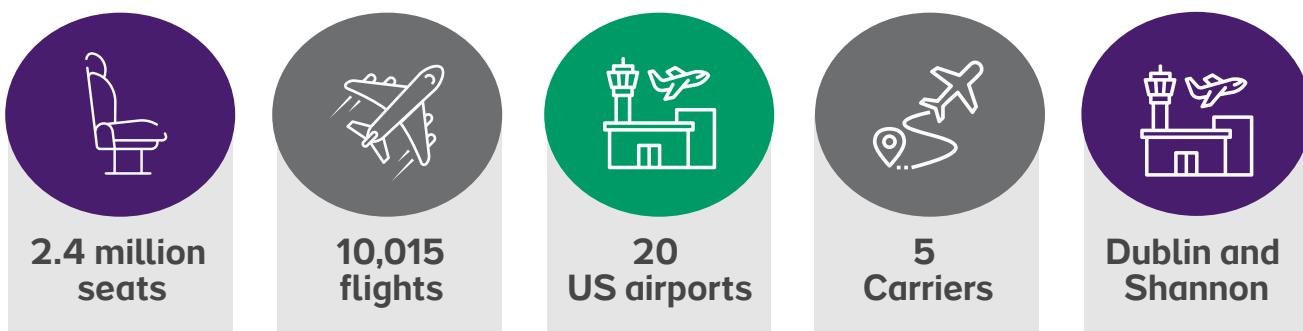
1		To feel connected to nature	6		To experience living like a local
2		To broaden and stimulate my mind	7		To enjoy authentic moments with friendly locals
3		To feel the character of the place and people	8		To be transported back in history
4		To appreciate historical/modern architecture	9		To discover and explore somewhere new
5		To experience the vibrancy of the place and people	10		To enjoy the beauty of the landscape

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

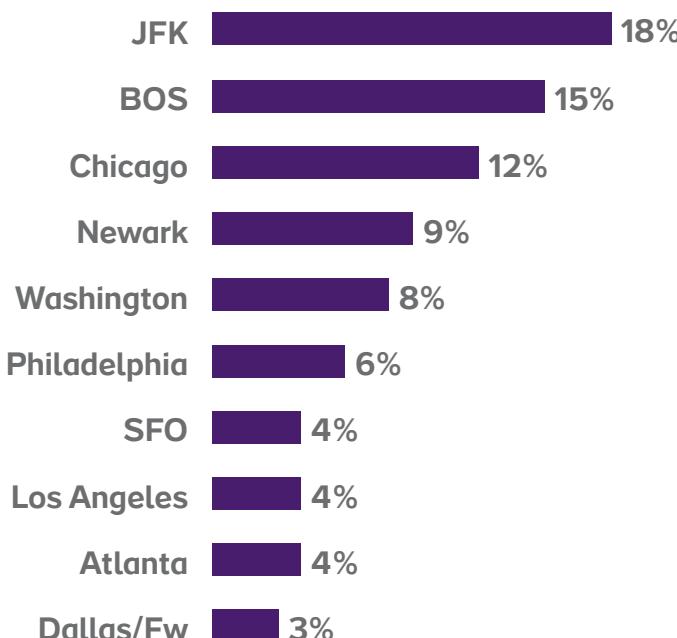
There were 2.4 million direct one-way air seats available on over 10,000 flights from 20 US gateways to the island of Ireland in 2024.



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 top 10 airports



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?

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

