

USA

MARKET PROFILE 2025



INBOUND TOURISTS

The island of Ireland welcomed almost 1.4 million American tourists, who spent €1.8/£1.6 billion and stayed almost 12 million nights in 2025. This makes the United States the island's second largest source of overseas tourists, nights and revenue.



WHERE DID OUR TOURISTS COME FROM?

While the South represented just over one quarter of visitors (26%), the Midwest (21%), Mid Atlantic (20%) and West (19%) each contributed around one fifth.

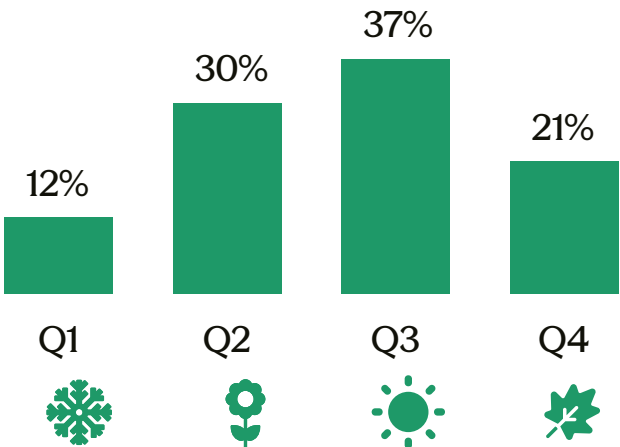
SOUTH	MIDWEST	MID ATLANTIC	WEST	NEW ENGLAND
26%	21%	20%	19%	13%

WHERE DID OUR TOURISTS VISIT?



WHEN DID OUR TOURISTS VISIT?

Around two-thirds (67%) of American tourists visited the island during Q2 and Q3 (April–September).



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

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

INBOUND TOURISTS

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Holidaymakers generated 67% of US revenue and made up 64% of the share of American tourists, while 20% visited friends or relatives (VFR).

		REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
	HOLIDAY	€1.2/£1.0m	67%	885k	64%	6.4m	53%
	VFR	€221/£193m	12%	274k	20%	2.8m	24%
	BUSINESS	€131/£114m	7%	106k	8%	638k	5%
	OTHER	€234/£204m	13%	141k	10%	2.1m	18%

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

On average, American tourists spent €1,293/£1,125 per trip or €150/£131 per night and stayed 8.6 nights on the island of Ireland in 2025.



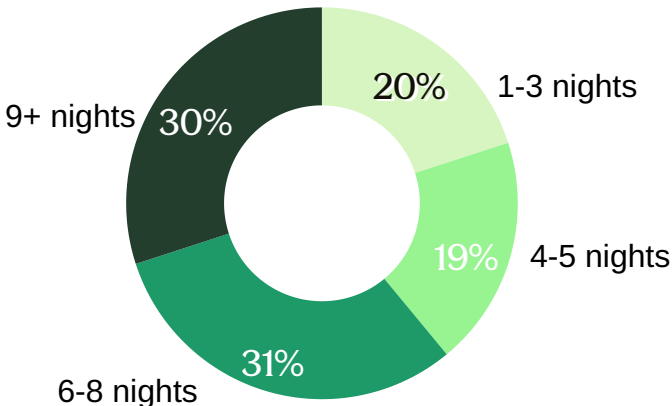
HOW DID OUR TOURISTS SPEND THEIR MONEY?

American tourists spent more on food and drink (37%) than on accommodation or any other element of their stay.

Food & drink	Accomm.	Shopping
		
37%	26%	14%
Transport	Entertainment	Misc.
		
12%	8%	2%

HOW LONG DID OUR TOURISTS STAY?

Most visitors (61%) stayed on the island of Ireland for six nights or more.



INBOUND TOURISTS AND HOLIDAYMAKERS

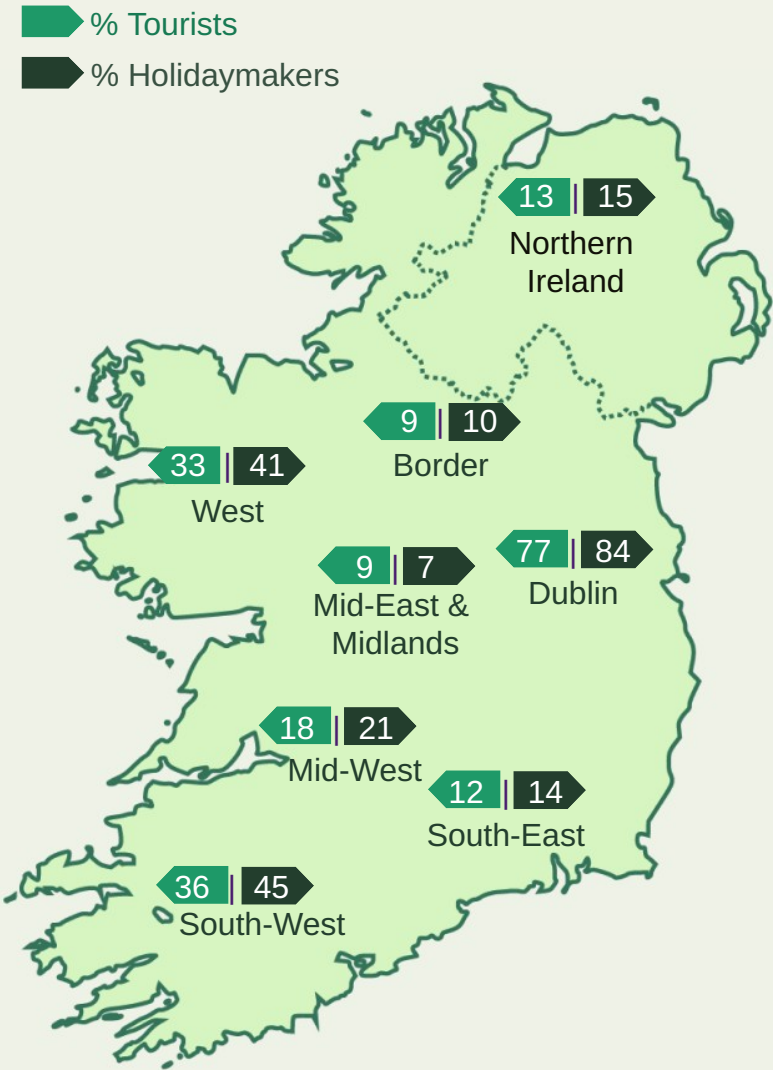
WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin, the South-West and the West were the most popular areas for both US tourists and holidaymakers.

Almost 157,000 US tourists and 112,000 holidaymakers overnighted on both sides of the border.

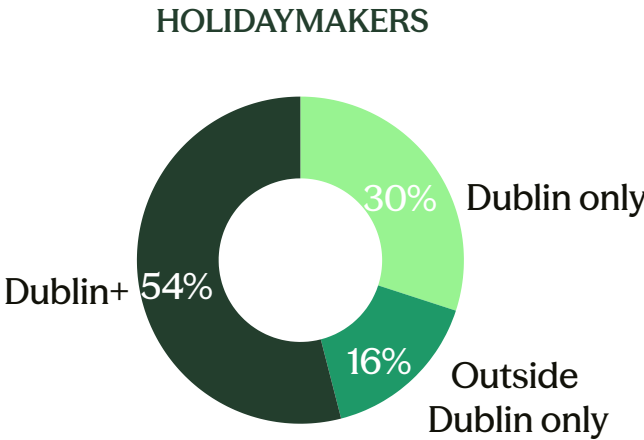
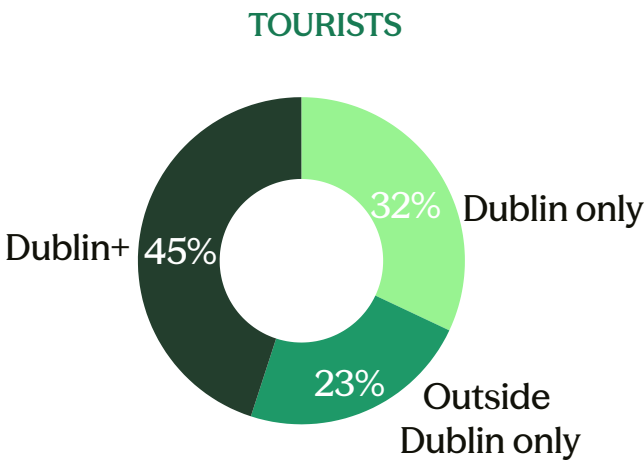
Top	Tourists	Holidaymakers
1	Dublin	Dublin
2	South-West	South-West
3	West	West

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+ trips are the most popular option among both American tourists (45%) and holidaymakers (54%).



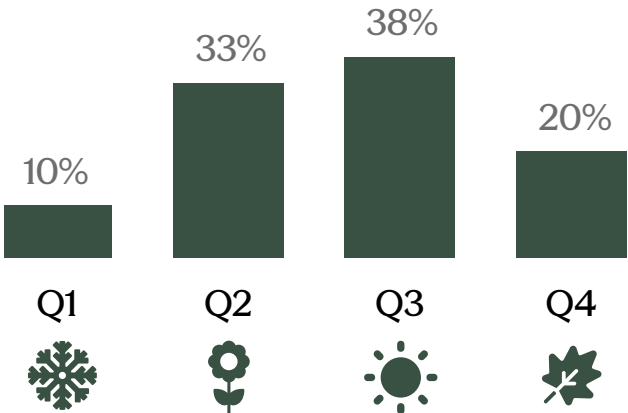
INBOUND HOLIDAYMAKERS

The US was the island of Ireland's largest source of holiday revenue and nights and the second-largest source of overseas holidaymakers. American holidaymakers typically spend more per night (€189/£164) than the average overseas holidaymaker (€109/£95) on the island of Ireland.



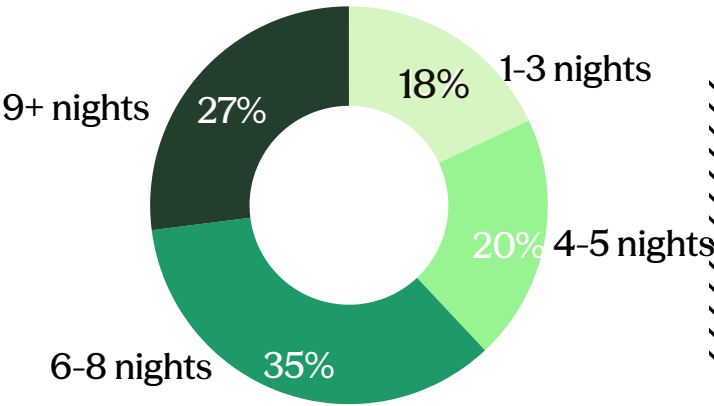
WHEN DID OUR HOLIDAYMAKERS VISIT?

Around seven in ten (71%) American holidaymakers visited during Q2 and Q3 (April–September).



HOW LONG DID OUR HOLIDAYMAKERS STAY?

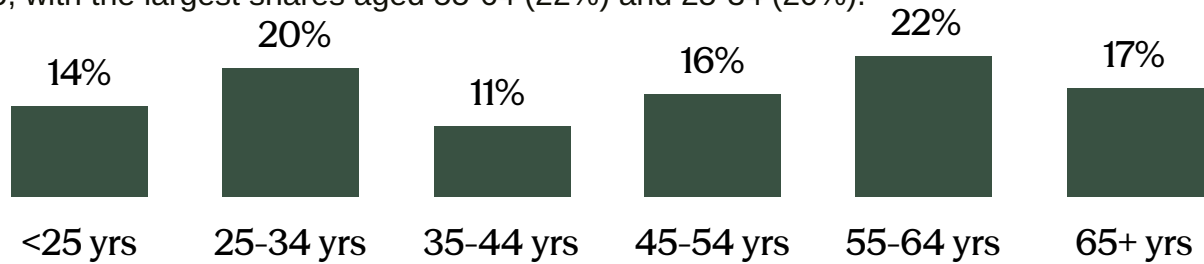
The majority (62%) of American holidaymakers stayed six or more nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

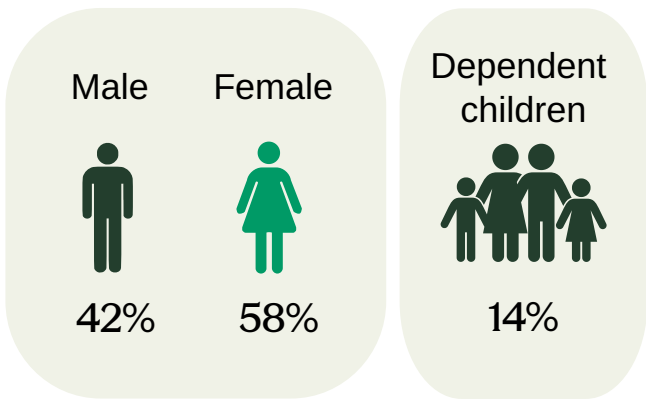
WHAT AGE WERE OUR HOLIDAYMAKERS?

American holidaymakers visiting the island of Ireland represented a broad mix of age groups in 2025, with the largest shares aged 55-64 (22%) and 25-34 (20%).



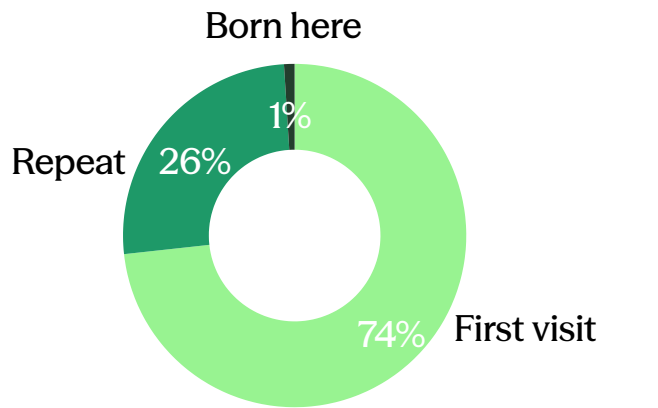
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN*

US holidaymakers were broadly gender-balanced, with a slight skew towards female.



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

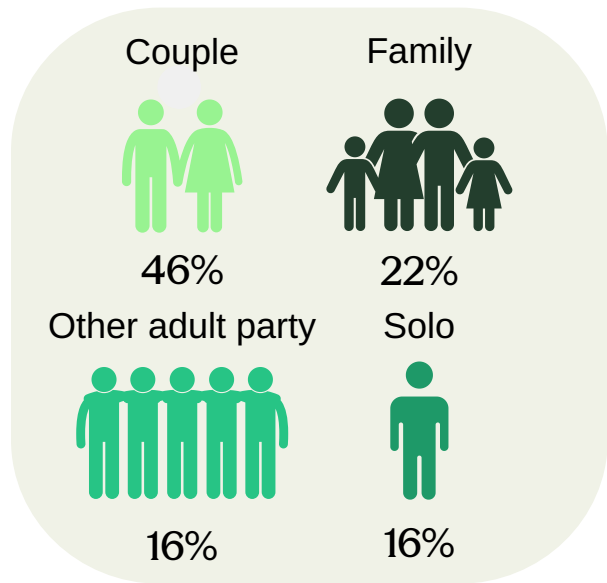
It was a first visit to the island of Ireland for around three-quarters (74%) of American holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Couples dominated travel from the US market, accounting for 46% of holidaymakers. A further 22% travelled with family.

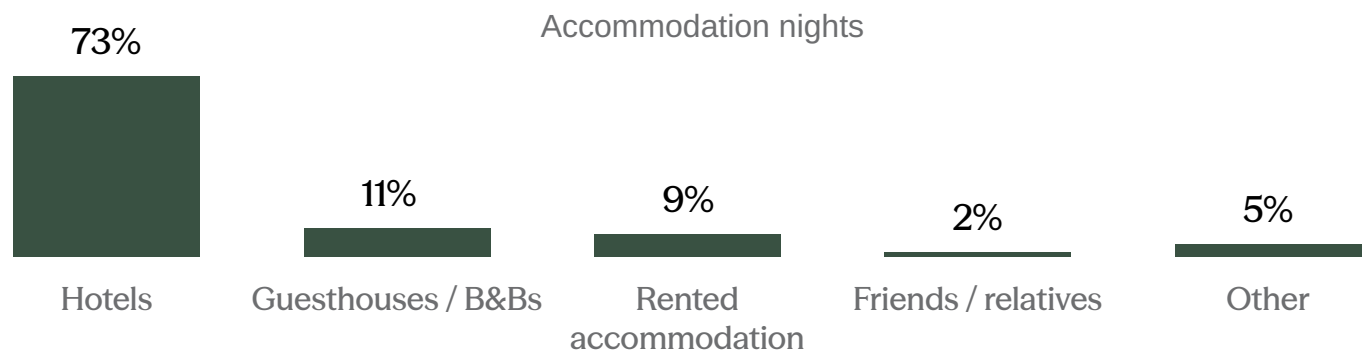
Travelling solo or with an "other adult party" were equally represented with one in six doing each.



INBOUND HOLIDAYMAKERS

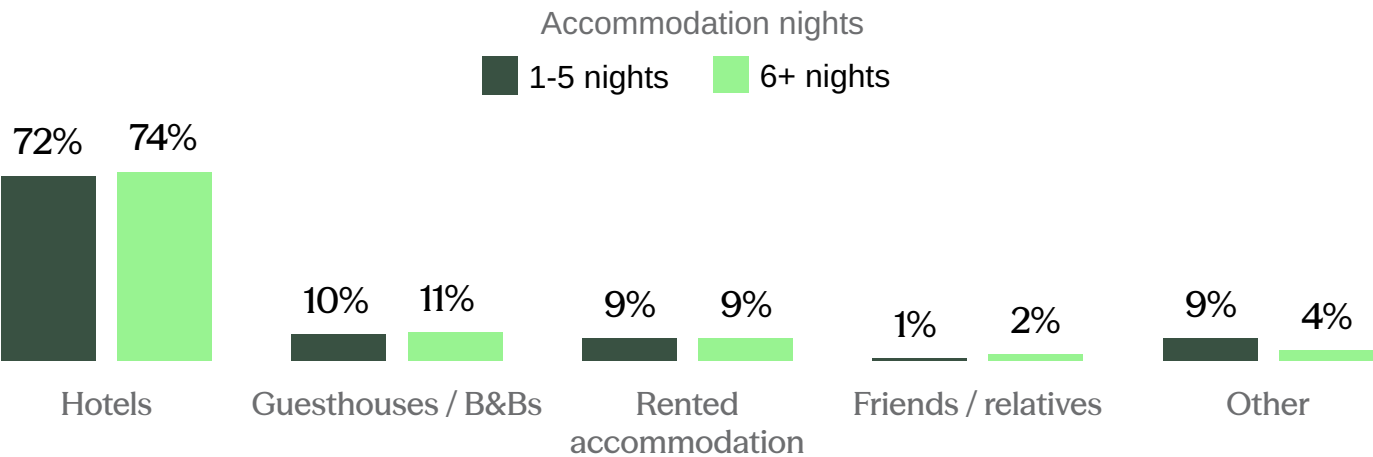
WHERE DID OUR HOLIDAYMAKERS STAY?

Hotels are the preferred accommodation choice for most American holidaymakers, accounting for three in four bednights.



HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?

American holidaymakers predominantly chose hotels, with little variation by length of stay. Longer stays are slightly more likely to use guesthouses/B&Bs (11% vs. 10%) and rented accommodation (9%), while shorter stays made greater use of other accommodation types.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

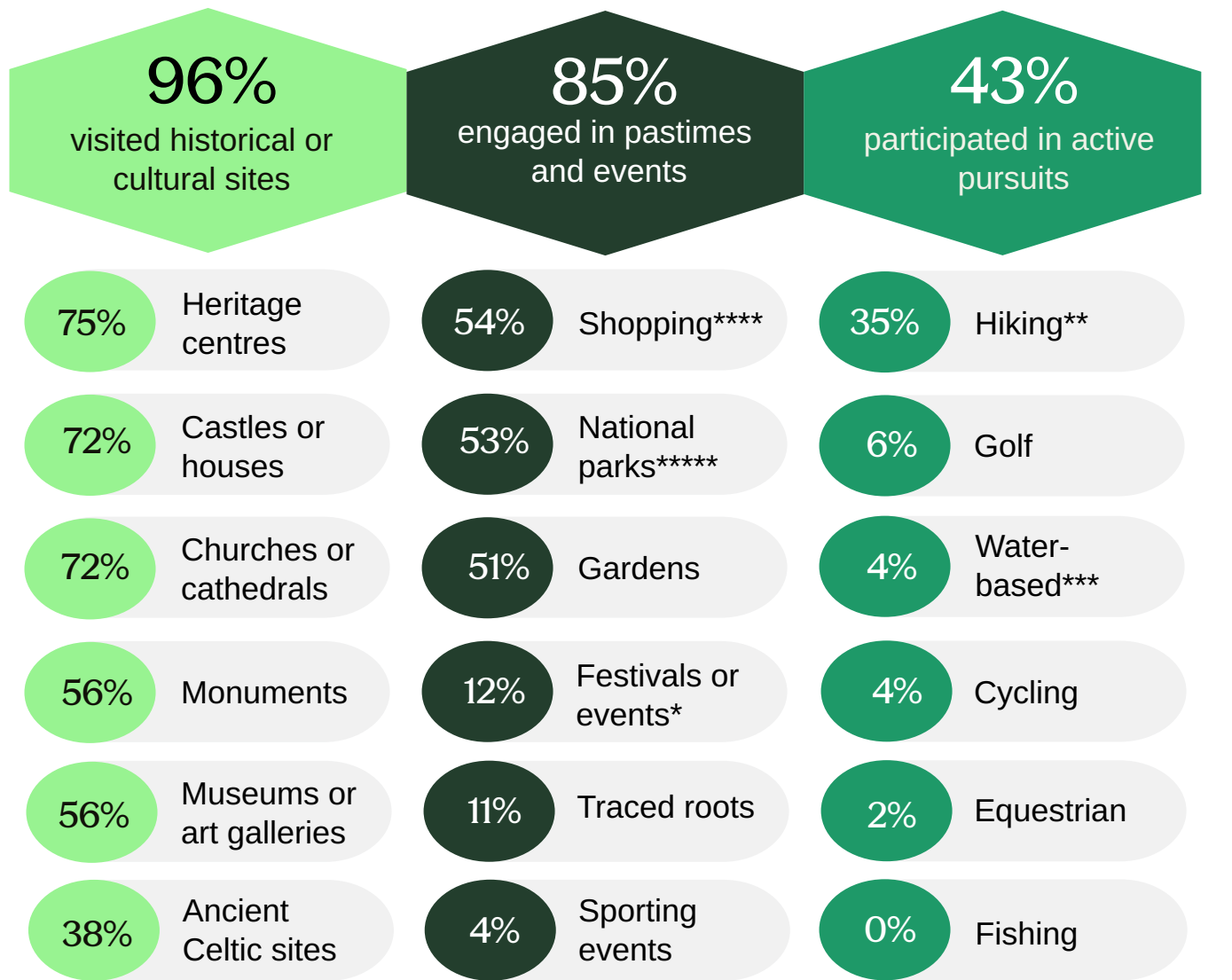
Americans are predominantly independent travellers, with 78% travelling independently. Package holidays also played a role in this market, with 22% travelling as part of a package. Car hire was widely used, supporting exploration around the island.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

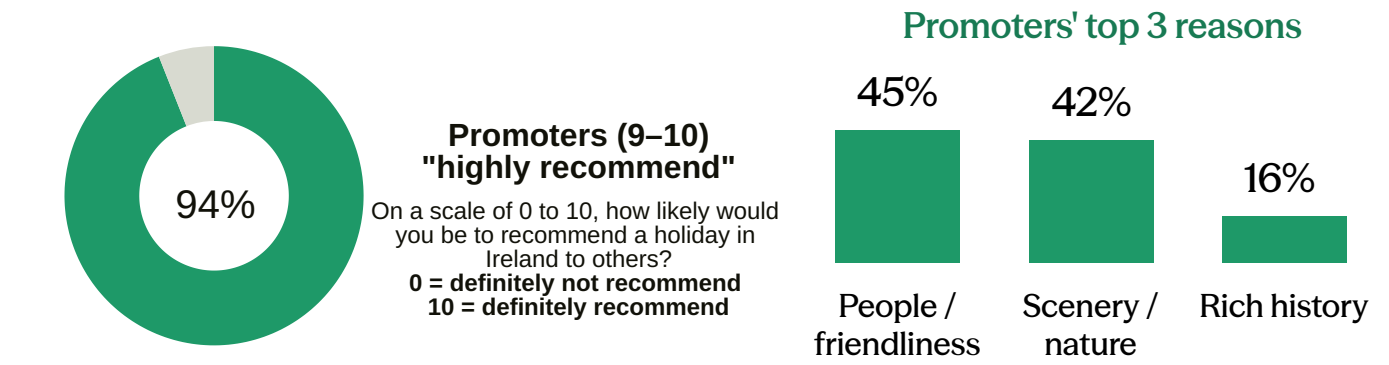
American holidaymakers are engaged tourists. They explored our historical sites and engaged in multiple pastimes while on the island of Ireland.



*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

American holidaymakers are strong advocates for Ireland, with 94% classified as promoters. The main drivers of this advocacy are the friendliness of the people (45%) and the scenery and nature (42%), while Ireland's rich history (16%) is a secondary but still important factor.



OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from the US use multiple sources of inspiration when choosing a holiday destination, including family and friends' recommendations and general online searches. While social media continues to play a role in both dreaming and planning, artificial intelligence (AI) is becoming an increasingly important source of travel information, cited by almost one quarter (24%) of travellers in the planning stage.

Family and friends drive inspiration for more than one in three American holidaymakers

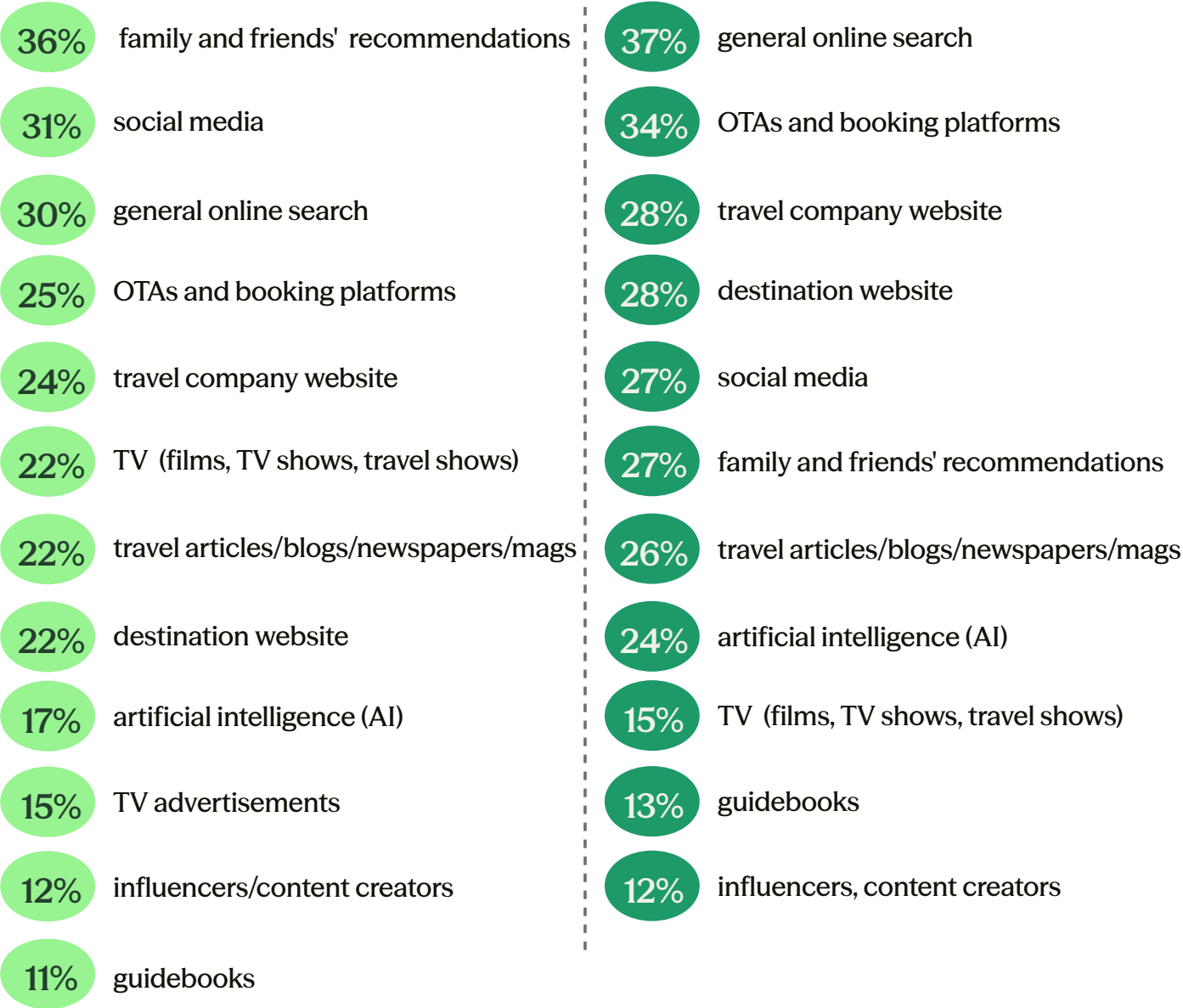
Online search is the most popular tool for trip planning

DREAMING



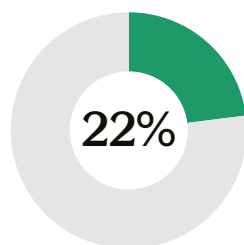
RESEARCH AND PLANNING

BASED ON RESPONDENTS' TOP 3 SOURCES

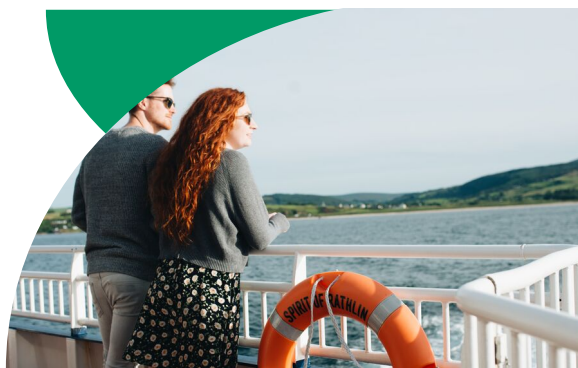


ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



of American
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



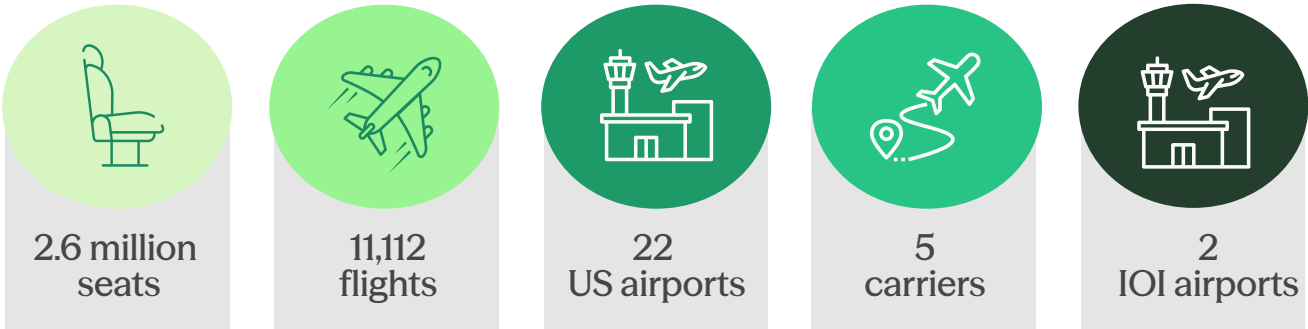
To enjoy the beauty of the landscape

OUTBOUND TOURISTS

The United States was the world's largest outbound market in 2025 and 30% of all outbound trips from the US were to Europe.

ACCESS BY AIR

There were 2.6 million direct one-way air seats available on over 11,112 flights from 22 gateways in the United States to the island of Ireland in 2025.



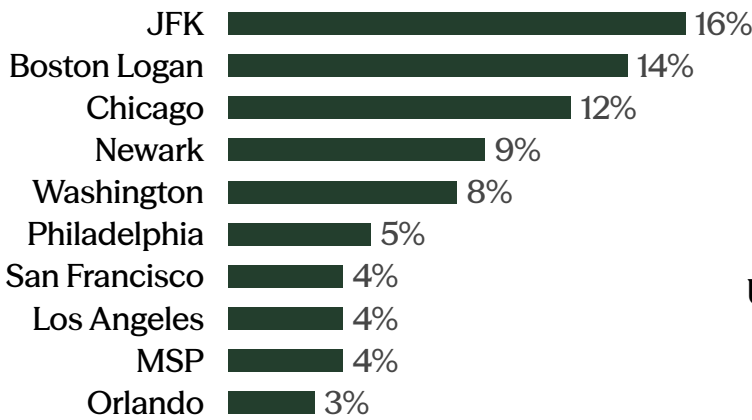
WHERE CAN OUR TOURISTS FLY FROM?

The top five US airports (JFK, Boston Logan, Chicago, Newark and Washington) accounted for the majority (59%) of seats in 2025.

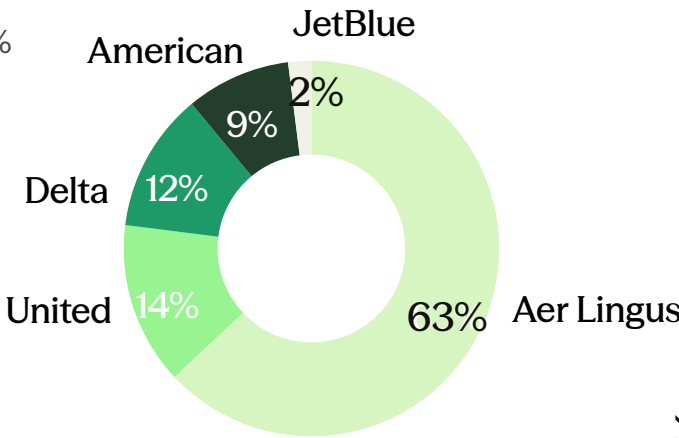
WHO CAN OUR TOURISTS FLY WITH?

Five carriers operated routes between the United States and the island of Ireland. The majority (89%) of seats were delivered by three key carriers: Aer Lingus (63%), United (14%) and Delta (12%).

SHARE OF SEATS BY AIRPORT (TOP 10)



SHARE OF SEATS BY CARRIER



JFK = John F. Kennedy International Airport
MSP= Minneapolis–Saint Paul International Airport