TRAVEL PROFILE: United States

1. Tourist Numbers & Revenue

With strong cultural and ancestral links, the US is an important target market for Ireland. In 2015 and 2016 Ireland has experienced double digit growth figures for tourist numbers from America, 12% and 15% respectively.

US Tourists
Tourists stay one or more nights (i.e. excluding same day travellers) and can be classified into:

Main purpose of visit

- **1 Holidaymakers**: 70%
- **2 Visiting Friends & Relatives (VFR)**: 16%
- **3 Business Tourists**: 10%
- **4 Other**: 5%

This travel profile looks at (1) the overview of tourist numbers and revenue (figures include holidaymakers, visiting friends and relatives, business tourists and others combined), then (2) focuses on the US holidaymaker specifically, and finally (3) looks at what holiday activities and experiences interest potential American holidaymakers to Ireland.

Where Do Ireland’s Tourists Come From?

- **Great Britain**: 3,632,000
- **Northern Ireland**: 1,358,000
- **United States of America**: 1,294,000
- **Germany**: 624,000
- **France**: 494,000
- **Spain**: 370,000
- **Italy**: 326,000

Trend in US Tourist Numbers (000s)

Although not the top market in terms of tourist numbers, the US market is Ireland’s highest spending market.

Revenue (€m)

The US surpassed Britain as the overseas market generating the largest revenue for Ireland in 2015, and remained so in 2016. Such strong revenue is attributable to increasing US tourist numbers and longer average stay.
2. US Holidaymaker Profile

70% of US tourists cite holiday as the main purpose of visit to Ireland, making holidaymakers the most important type of US tourist to Ireland.

US holidaymakers are typically under 55 years old (68%), are most likely to travel between May and September (64%) and when in Ireland they prefer to use serviced accommodation, predominantly hotels (68%). Americans have a positive perception of Ireland. They are attracted to experiences that engage with Ireland’s living culture, history and heritage and Ireland’s diverse landscape.

Profile of US Holidaymakers

Nearly eight in ten (79%) US holidaymakers are first time visitors to Ireland, with two in ten returning to Ireland for a repeat visit. This rate differs from other markets, bearing in mind it’s a long haul market and the average American’s entitlement to a limited number of annual leave (average 10 days after 3 working years, increasing to 14 days after 10 years’ service).

Travel Arrangements

Seven in ten US holidaymakers (71%) travel independently to Ireland. Nearly three in ten (29%) arrive on a package holiday - where the fare to/from Ireland and at least one other element (such as accommodation, car hire etc) was paid fully or partly in advance.

Holiday Party Type

Nearly half of US holidaymakers travel to Ireland as part of a couple. Nearly seven in ten holidaymakers (68%) are under 55, highlighting the younger profile of current US holidaymakers.

Over half of US holidaymakers stay in Ireland for over 5 nights (60%); a quarter (26%) staying 9 nights or longer.

Travel Routes

US holidaymakers travel to Ireland by a number of different routes many including Ireland as part of a wider trip to Europe. Nearly half of US holidaymakers travel to Ireland as part of a couple. Nearly seven in ten holidaymakers (68%) are under 55, highlighting the younger profile of current US holidaymakers.

Over half of US holidaymakers stay in Ireland for over 5 nights (60%); a quarter (26%) staying 9 nights or longer.

Age (2016)

<table>
<thead>
<tr>
<th>Age</th>
<th>Under 19 Years</th>
<th>19 - 34 Years</th>
<th>35 - 54 years</th>
<th>55 - 64 years</th>
<th>65+ years</th>
</tr>
</thead>
<tbody>
<tr>
<td>19%</td>
<td>5%</td>
<td>36%</td>
<td>27%</td>
<td>18%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Length of Stay (2016)

<table>
<thead>
<tr>
<th>Length of Stay</th>
<th>1 - 3 Nights</th>
<th>1 - 5 Nights</th>
<th>1 - 8 Nights</th>
<th>9 or more nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>21%</td>
<td>40%</td>
<td>74%</td>
<td>26%</td>
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</tr>
</tbody>
</table>

Where Are They From?

70% of American Holidaymakers come from three regions.

Region of Residence (2016)

- West Coast
- South
- Mid Atlantic

Sources

Fáilte Ireland Survey of Overseas Travellers 2016
Fáilte Ireland Holiday Behaviour Deepdive 2016
2. US Holidaymaker Profile

When Do They Travel?

<table>
<thead>
<tr>
<th>Quarter</th>
<th>% of Travelers</th>
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</thead>
<tbody>
<tr>
<td>Q1 Jan-Mar</td>
<td>13%</td>
</tr>
<tr>
<td>Q2 Apr-Jun</td>
<td>30%</td>
</tr>
<tr>
<td>Q3 Jul-Sept</td>
<td>39%</td>
</tr>
<tr>
<td>Q4 Oct-Dec</td>
<td>18%</td>
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</tbody>
</table>

Dublin is a must-see destination for over three quarters of US holidaymakers (83%) and a natural first stop for many on arrival, while the South-West (47%), the West (34%) and Mid-West (31%) are also very appealing.

Where Do They Go?

US Holidaymaker Regions Visited

- 1.Dublin: 83%
- 2.Mid-East: 7%
- 3.Midlands: 2%
- 4.South-East: 17%
- 5.South-West: 47%
- 6.Mid-West: 31%
- 7.West: 34%
- 8.Border: 10%

Where Do They Stay?

US Holidaymaker Nights Spent in Regions

- Hotels: 68%
- Guesthouse/B&B: 15%
- Rented: 10%
- Hostels: 12%
- Friends/Relatives: 5%

Sources

Failte Ireland Survey of Overseas Travellers 2016
3. US Holiday Travel Choices

What Types Of Holiday Are Americans Looking For?

Americans would definitely consider taking this type of holiday in Ireland in the next three years.

- City Break (multiple cities)
- Touring Holiday
- City Break (one city)
- Adventure/Active holiday
- Holiday in a rural destination
- Holiday to celebrate a special occasion
- An all-inclusive holiday package

What Activities Do Americans Typically Do On Holiday?

- Visit a nature reserve/national park
- Walking (typically up to 5km/3 miles per walk)
- Boat trips
- Hiking/cross-country walking (more than 5km/3 miles per walk)
- Outdoor adventure parks (zipwires/rope bridges etc.)
- Any watersports

Typically Americans like to enjoy easy activity on their holiday as a way to interact with rather than observe the landscape. Outdoor activity appeals to this market more than other markets.

In keeping with this, walking has been ranked as an increasingly important activity for Americans.

While watersports feature as part of past holidays activity, lack of awareness of the climate and water temperature in Ireland may prohibit a high level of uptake.

Activities that Americans typically participate in on holiday abroad match what they would see themselves doing if holidaying in Ireland.

Sources

Fáilte Ireland Holiday Behaviour Deepdive 2016
Americans are extremely positive about what Ireland has to offer, showing above average interest in many experiences over Ireland’s other core markets of Great Britain, France and Germany. Although it should be remembered that Americans have a tendency to respond more positively in tourism research than other markets.

They are drawn to Ireland’s living culture, history, heritage and scenery. The more informal experiences of exploring towns, people watching and living like a local are particularly appealing.

<table>
<thead>
<tr>
<th>Experiences interested in doing in Ireland</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Sit outside a pub/cafe and people watch</td>
<td>60%</td>
</tr>
<tr>
<td>2 Spend an afternoon exploring/strolling around a picturesque town</td>
<td>59%</td>
</tr>
<tr>
<td>3 Driving tour visiting a number of historical sites</td>
<td>55%</td>
</tr>
<tr>
<td>4 Visit a festival celebrating local culture, food and heritage</td>
<td>54%</td>
</tr>
<tr>
<td>5 Take a boat tour around Ireland’s coastal villages</td>
<td>54%</td>
</tr>
<tr>
<td>6 Walk along some of the highest sea cliffs in Europe</td>
<td>52%</td>
</tr>
<tr>
<td>7 Experience the local music and entertainment scene (nightlife)</td>
<td>52%</td>
</tr>
<tr>
<td>8 Explore spectacular scenery by bike or on foot</td>
<td>52%</td>
</tr>
<tr>
<td>9 Visit tombs and historical sites older than the pyramids</td>
<td>52%</td>
</tr>
<tr>
<td>10 Take a trip to the rugged, remote islands off the coast</td>
<td>50%</td>
</tr>
<tr>
<td>11 Experience sights and sounds of modern Ireland that’s not in the guide books</td>
<td>49%</td>
</tr>
<tr>
<td>12 Take a walking tour where a guide tells you the story of the area</td>
<td>49%</td>
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Considering the limited holiday allowance afforded to most Americans, and the relatively long length of stay in Ireland, our American holidaymakers invest a large proportion, if not all of their holiday allowance to come to Ireland.

**Enhancing The Holiday Experience**

How Can we Ensure They Have The Best Possible Experience?

- Don’t underestimate the attraction of simply soaking up the atmosphere of a town or village – point holidaymakers in the right direction of where best to go or places not to be missed.
- Give recommendations on where they can engage with locals authentically.
- A touring holiday visiting many locations is definitely something that Americans would consider – are there opportunities to help them to join the dots between stops, with hidden gem attractions, lunch/coffee options or scenic spots to just catch their breath.
- As a new world nation, the history and heritage of Ireland interests this market. Colourful stories and tales of local characters will get a welcome reception.
- Opportunities to get active as a way to enjoy the scenery appeal to Americans. Getting on the water for boat trips for a new perspective on our coastal scenery interests them.
- Walking is a key activity for US holidaymakers and growing in popularity.
- Americans are attracted to nature reserves and national parks, it’s something they do while abroad and so would seek out in Ireland also.

**Sources**

Fáilte Ireland Holiday Behaviour Deepdive 2016

Fáilte Ireland National Tourism Development Authority