

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

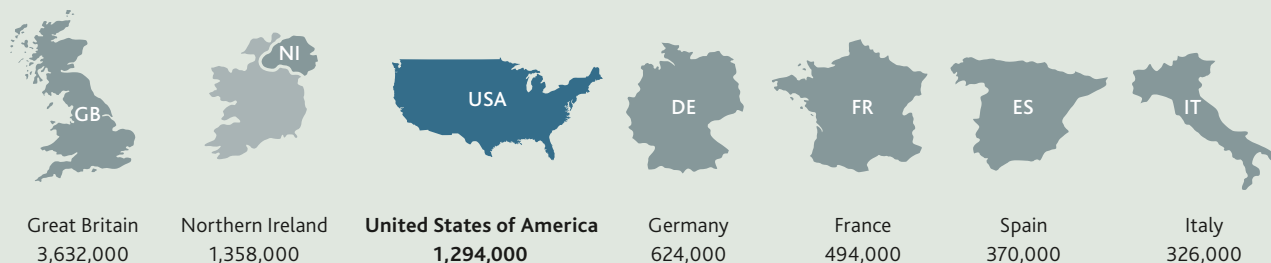
Tourists stay one or more nights (i.e. excluding same day travellers) and can be classified into:

Main purpose of visit

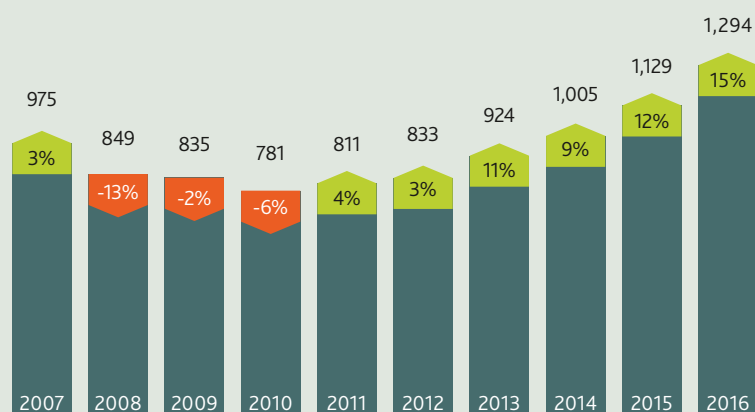


This travel profile looks at (1) the overview of tourist numbers and revenue (figures include holidaymakers, visiting friends and relatives, business tourists and others combined), then (2) focuses on the US holidaymaker specifically, and finally (3) looks at what holiday activities and experiences interest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

Where Do Ireland's Tourists Come From?

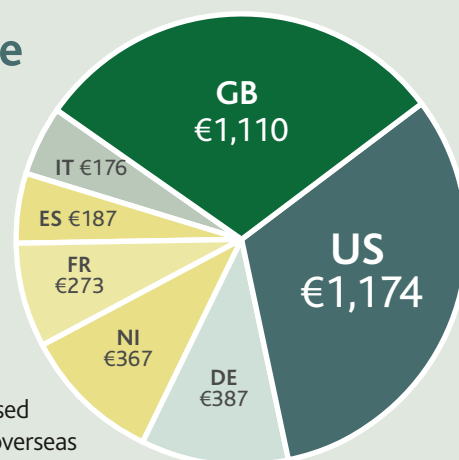


Trend in US Tourist Numbers (000s)



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.



71%



29%

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.

1 Couple



48%

2 Alone



19%

3 Adult Group



17%

4 Family



16%

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

Age (2016)

Under 19 Years	5%
19 - 34 Years	36%
35 - 54 years	27%
55 - 64 years	18%
65+ years	13%

Length of Stay (2016)

1 - 3 Nights	21%
1 - 5 Nights	40%
1 - 8 Nights	74%
9 or more nights	26%

Travel Routes

US holidaymakers travel to Ireland by a number of different routes many including Ireland as part of a wider trip to Europe.



Transatlantic Air

50%

Indirect Air
(Via GB/Mainland
Europe/Asia)



47%



Britain, Sea

3%

Where Are They From?

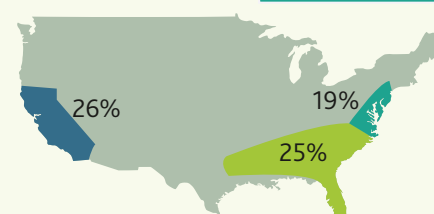
70% of American Holidaymakers come from three regions.

Region of
Residence (2016)

West Coast

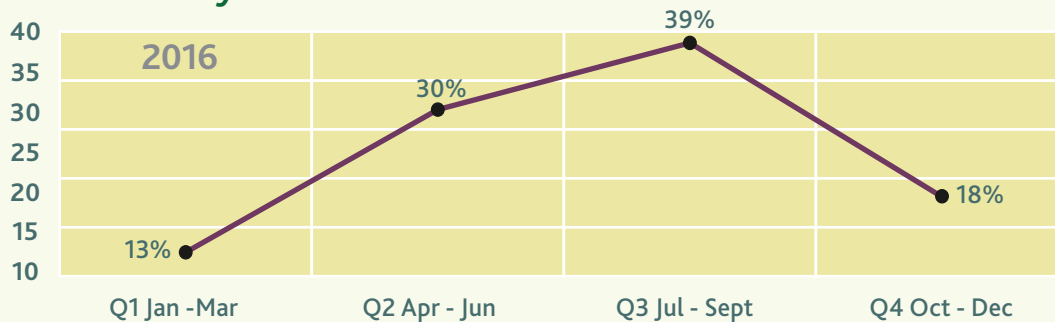
South

Mid Atlantic

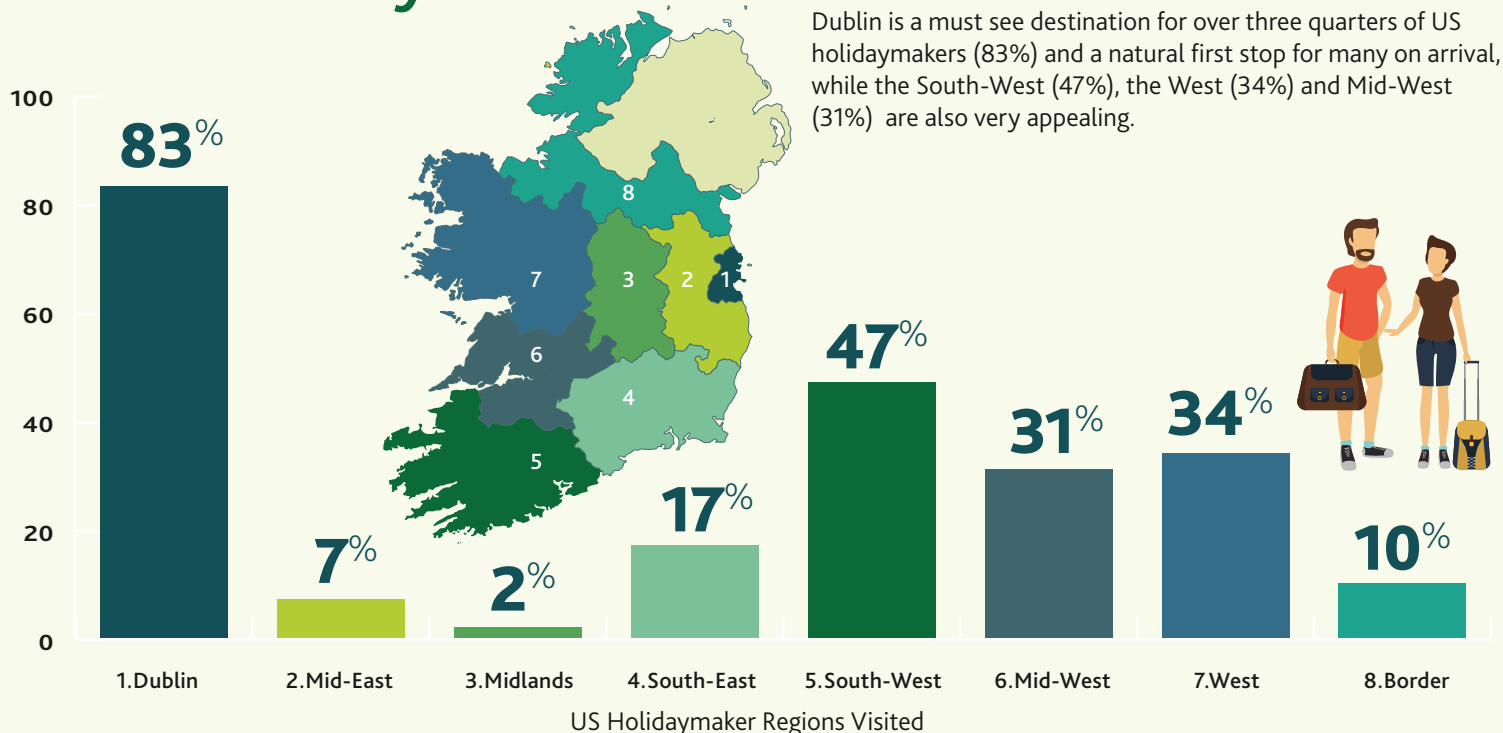


2. US Holidaymaker Profile

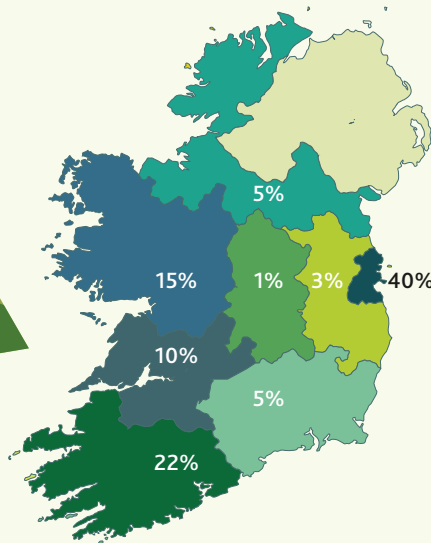
When Do They Travel?



Where Do They Go?

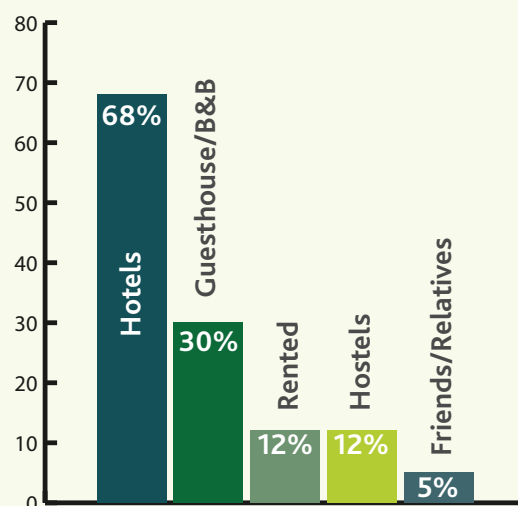


Where Do They Stay?



US Holidaymaker Nights Spent in Regions

Holiday - Accommodation Used (%)

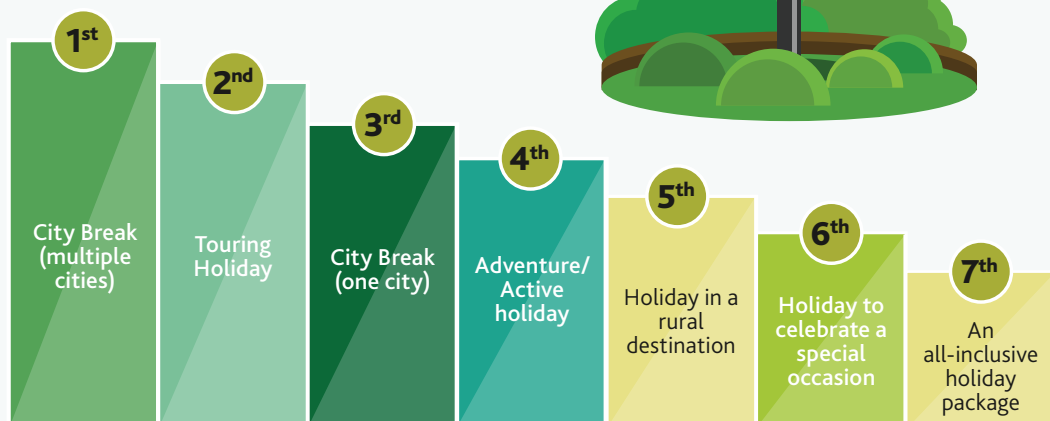


3. US Holiday Travel Choices

What Types Of Holiday Are Americans Looking For ?

Americans would consider visiting Ireland for city breaks, particularly as part of a wider itinerary incorporating multiple cities (both nationally and internationally) and see it as a place for touring and active/adventure holidays. These holiday types are all in line with the holiday behaviour of this market in the last 3 years, positioning Ireland well as a destination for potential US holidaymakers.

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



What Activities Do Americans Typically Do On Holiday?

- ▶ 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



Type of holiday activities Americans would consider doing on holiday in Ireland?



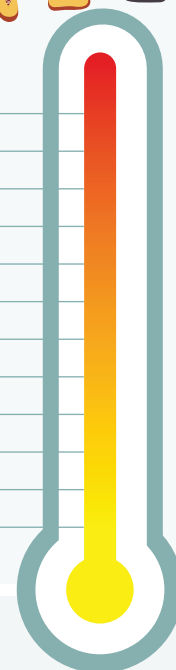
3. US Holiday Travel Choices

Things To See And Do On Holiday

- ▶ 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



Experiences interested in doing in Ireland		%
1	Sit outside a pub/cafe and people watch	60%
2	Spend an afternoon exploring/strolling around a picturesque town	59%
3	Driving tour visiting a number of historical sites	55%
4	Visit a festival celebrating local culture, food and heritage	54%
5	Take a boat tour around Ireland's coastal villages	54%
6	Walk along some of the highest sea cliffs in Europe	52%
7	Experience the local music and entertainment scene (nightlife)	52%
8	Explore spectacular scenery by bike or on foot	52%
9	Visit tombs and historical sites older than the pyramids	52%
10	Take a trip to the rugged, remote islands off the coast	50%
11	Experience sight and sounds of modern Ireland that's not in the guide books	49%
12	Take a walking tour where a guide tells you the story of the area	49%



Enhancing The Holiday Experience

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.

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

