USA Market Profile

For general Trade enquiries contact:
Virginia Goff (Promotions Executive), Tel: +1 212 418 0819 , vgoff@tourismireland.com

Size of the US market to the island of Ireland

	2005	2006	2007	2008	2009	2010e	2011e
Outbound leisure & VFR trips to Europe (000)	10,047	9,653	10,355	9,300	9,146	8,139	7,836
Total visits (000)	890	965	995	885	868	811	855
Holiday visits (000)	571	617	644	562	517	507	558
Promotable visitors (000)	593	637	667	585	537	527	573

All Euro (€) / Sterling (£) conversions have been carried out at a rate of €1 = £0.86798
(Revenue does not include carrier receipts or international air and sea fares)
Promotable visits = Holiday, Conference/Incentive & EFL (English as a foreign language)

%'s may not add to 100% due to rounding

Tourism Ireland
Marketing the island of Ireland overseas

Holidaymakers at a glance ...

The US remains the second most important market to the island of Ireland (after GB) in terms of visitors, holidaymakers, promotables and revenue.

Every second American holidaymaker (48%) visiting the island of Ireland arrived during the summer months of June, July and August, while 70% arrived between May and September.

A stay of 6-8 nights is the most common (37%) holiday length among our American visitors.

Hotels (49%) remain by far the most popular accommodation type used in 2011, followed by Guesthouses & B&B's (22%) and staying with friends/relatives (11%).

Three-quarters of American holidaymakers overnighted in Dublin during their 2011 trip. The South-West and Western regions were also very popular among our American visitors. The South-East and Mid-West welcome a greater share of holidaymakers from the US than from any other market. In fact, US holidaymakers are more likely to visit more than one region than any other market, with the exception of Australia.

As such, a greater share of American holidaymakers hire a car during their trip than any other market.

With one-third of American visitors on a package holiday, holidaymakers from the US remain the highest package holiday users (33%) and the least likely online users (29%) when booking their holiday across all markets – with the exception of Canada.

It was their first visit to the island of Ireland for 71% of US holidaymakers in 2011.

Two-fifths of US holidaymakers travelled as part of a couple and were AB's, the highest portion of this socio-economic group across all markets.

Most (83%) of US visitors were on a sightseeing & culture seeking holiday.

When do holidaymakers arrive?

Month Of Arrival	2005	2006	2007	2008	2009	2010	2011
January - March	***13%***	***13%***	***11%***	***12%***	***12%***	***10%***	***9%***
January	3%	3%	3%	3%	3%	3%	2%
February	3%	3%	4%	4%	3%	3%	1%
March	6%	6%	5%	5%	6%	5%	6%
April	5%	7%	6%	11%	10%	8%	8%
May	13%	14%	13%	11%	8%	12%	10%
June	14%	17%	16%	19%	18%	16%	19%
July	14%	14%	14%	15%	16%	12%	13%
August	15%	12%	13%	9%	11%	12%	16%
September	9%	11%	11%	12%	8%	14%	11%
October	11%	7%	9%	5%	10%	7%	9%
November	5%	4%	4%	4%	4%	6%	3%
December	2%	1%	2%	3%	3%	4%	1%
October - December	***18%***	***13%***	***15%***	***12%***	***16%***	***17%***	***13%***

%'s may not add to 100% due to rounding

Jump into Ireland

When did holidaymakers decide to visit?**

Month Decided to visit	2005	2006	2007	2008	2009	2010	2011
Pre-September (previous year)		7%	8%	13%	8%	12%	13%
Oct-December (previous year)		20%	24%	23%	17%	16%	16%
January		15%	13%	12%	13%	10%	8%
February		10%	10%	11%	12%	13%	10%
March		12%	11%	12%	11%	11%	21%
April		11%	7%	8%	11%	10%	8%
May		7%	9%	6%	6%	7%	11%
June		5%	6%	6%	7%	7%	3%
July		6%	5%	3%	6%	5%	3%
August		3%	4%	3%	4%	4%	4%
September		3%	3%	3%	2%	4%	2%
October		0%	0%	1%	1%	1%	0%
November		0%	0%	1%	0%	0%	0%
December		0%	0%	0%	0%	0%	0%

* some misattribution into previous year (Pre September and Oct-December)

When did holidaymakers make a reservation?**

Month reserved part of trip	2005	2006	2007	2008	2009	2010	2011
Pre-September (previous year)		4%	3%	7%	3%	5%	4%
Oct-December (previous year)		17%	21%	18%	15%	14%	14%
January		15%	13%	13%	14%	11%	7%
February		10%	10%	13%	12%	10%	13%
March		14%	14%	14%	12%	14%	22%
April		13%	9%	8%	11%	11%	10%
May		8%	9%	7%	9%	9%	13%
June		5%	8%	7%	9%	9%	3%
July		6%	5%	4%	7%	5%	5%
August		4%	4%	4%	4%	4%	5%
September*		4%	3%	4%	3%	5%	3%
October*		1%	1%	1%	1%	1%	0%
November*		0%	0%	1%	0%	1%	0%
December*		0%	0%	0%	0%	0%	0%

* some misattribution into previous year (Pre September and Oct-December)

How do holidaymakers travel to the island of Ireland?

Air vs. Sea	2005	2006	2007	2008	2009	2010	2011
Air	96%	95%	96%	96%	97%	98%	96%
Sea	4%	5%	4%	4%	3%	2%	4%

What is the length of stay for holidaymakers on the island of Ireland?

Length of stay	2005	2006	2007	2008	2009	2010	2011
1-5 nights	28%	31%	31%	32%	39%	34%	26%
6-8 nights	36%	38%	38%	30%	34%	33%	37%
9-14 nights	27%	26%	24%	29%	20%	26%	33%
15+ nights	8%	5%	6%	9%	7%	7%	4%
Average number of nights	*8.4*	*7.9*	*8.1*	*8.8*	*8.0*	*7.6*	*8.3*

%'s may not add to 100% due to rounding

Where do holidaymakers stay? (Distribution of bednights)

Accommodation	2005	2006	2007	2008	2009	2010	2011
Hotels	28%	24%	52%	33%	36%	50%	49%
Guesthouses & B&B's	18%	43%	29%	32%	24%	23%	22%
Rented	20%	7%	6%	11%	10%	7%	8%
Caravan/Camping	3%	2%	0%	1%	0%	0%	0%
Friends & Relatives	26%	22%	4%	9%	18%	7%	11%
Other	5%	3%	8%	14%	11%	13%	9%

Where do holidaymakers visit on the island of Ireland?

Regions visited	2005	2006	2007	2008	2009	2010	2011
Dublin	71%	77%	76%	77%	77%	77%	75%
Midlands East	11%	8%	10%	12%	10%	11%	9%
South Eastern	28%	31%	27%	26%	20%	22%	24%
South West	54%	52%	53%	49%	43%	47%	56%
Midwest	41%	38%	38%	37%	29%	31%	36%
Western	36%	40%	40%	37%	32%	35%	42%
Northwest	12%	9%	11%	11%	7%	8%	10%
Northern Ireland	9%	10%	11%	12%	12%	13%	12%

How many holidaymakers use a car?

Car Usage	2005	2006	2007	2008	2009	2010	2011
Car Not Used	55%	59%	56%	57%	59%	54%	52%
Car Hire	44%	41%	43%	42%	41%	46%	46%
Car Brought	1%	1%	1%	0%	0%	1%	2%

How do holidaymakers make their travel arrangements?

Travel Arrangement	2005	2006	2007	2008	2009	2010	2011
Package	32%	26%	33%	27%	27%	30%	33%
Independent	68%	74%	67%	73%	73%	70%	67%

Use of internet to book part of trip**

	2005	2006	2007	2008	2009	2010	2011
Yes		63%	71%	71%	79%	70%	71%
No		37%	29%	29%	21%	30%	29%

Items booked online**

	2005	2006	2007	2008	2009	2010	2011
Air-Sea tickets		59%	64%	67%	73%	66%	67%
Accommodation		39%	46%	54%	59%	57%	58%
Car hire		22%	25%	29%	28%	28%	33%
Other		2%	3%	2%	2%	1%	4%

%'s may not add to 100% due to rounding

Sites visited if using the internet**

	2005	2006	2007	2008	2009	2010	2011
Travel Agent's website		4%	7%	5%	7%	10%	11%
Specific accommodation provider's website		18%	17%	17%	15%	13%	18%
Specific Air/Sea Carrier's website		41%	35%	38%	54%	47%	41%
General holiday search portal		18%	22%	24%	11%	19%	25%
Tourist Board's website		16%	17%	13%	14%	11%	20%
Other site with general info on Irish holidays		13%	10%	9%	6%	9%	11%
User Generated Sites e.g. Blogs / Trip Advisor		n/a	2%	1%	3%	5%	9%
Car Hire Website		n/a	9%	12%	8%	9%	9%
Social Networking Sites e.g. Facebook		n/a	n/a	n/a	n/a	n/a	1%
Other		7%	5%	4%	1%	1%	1%

Have holidaymakers been to the island of Ireland before?

Familiarity	2005	2006	2007	2008	2009	2010	2011
First visit	67%	70%	76%	74%	71%	74%	71%
Repeat visit	31%	28%	23%	25%	27%	24%	27%
Born on the island of Ireland	1%	2%	1%	2%	2%	1%	2%

What is the social class profile of holidaymakers?

Social Class	2005	2006	2007	2008	2009	2010	2011
AB	27%	33%	33%	27%	24%	26%	40%
C1	62%	57%	56%	62%	63%	61%	47%
C2	8%	7%	5%	10%	10%	11%	9%
DEF	3%	2%	5%	2%	3%	2%	3%

What age are holidaymakers?

Age	2005	2006	2007	2008	2009	2010	2011
Under 16	4%	6%	4%	4%	2%	4%	3%
16-24	19%	19%	15%	16%	19%	15%	16%
25-34	13%	16%	13%	18%	19%	19%	19%
35-44	15%	14%	16%	10%	13%	10%	11%
45-54	18%	21%	23%	22%	20%	19%	20%
55+	31%	23%	29%	30%	26%	32%	31%

Who do holidaymakers travel with?

Party Composition	2005	2006	2007	2008	2009	2010	2011
Alone	24%	21%	19%	21%	24%	19%	23%
Couple	39%	45%	44%	42%	37%	43%	40%
With family	24%	17%	20%	18%	23%	19%	18%
Other Adult Party	14%	17%	17%	19%	17%	20%	19%

Segments

Best Description of Holiday Needs	2005	2006	2007	2008	2009	2010	2011
S&CS's	77%	83%	85%	82%	78%	78%	82%
Outdoor Actives	5%	2%	4%	3%	4%	4%	4%
Family & Loved Ones	7%	4%	4%	4%	4%	5%	5%
Affinity Groups	3%	2%	3%	2%	3%	4%	3%
Luxury Lovers	0%	0%	0%	1%	0%	1%	0%
Relaxers	6%	6%	4%	6%	6%	6%	5%
Social Adventurers	2%	2%	1%	2%	4%	3%	2%

%'s may not add to 100% due to rounding

Tourism Ireland
Marketing the island of Ireland overseas

What sites of historical interest do our holidaymakers visit?**

	2005	2006	2007	2008	2009	2010	2011
Any Of The Below		87%	89%	80%	87%	89%	90%
Historic Houses/Castles		80%	80%	71%	78%	84%	84%
Monuments		67%	71%	64%	70%	70%	72%
Heritage/Interpretative Centres		49%	57%	56%	51%	56%	65%
Museums/Art Galleries		49%	54%	52%	58%	60%	65%
Other Sites Of Cultural Historical Interest		5%	12%	9%	10%	11%	17%
None Of These		13%	11%	20%	13%	11%	10%

What pastimes/events do our visitors engage in?**

	2005	2006	2007	2008	2009	2010	2011
Visited Gardens		24%	23%	27%	36%	42%	52%
Visited National Parks/Forests		n/a	n/a	n/a	42%	48%	62%
Attended An Organised Sporting Event		1%	2%	1%	2%	3%	4%
Tracing Roots/Geneology		5%	3%	4%	5%	6%	8%
Attended Cultural Event/Festival		7%	8%	5%	7%	13%	13%
Used Spa Facilities		1%	1%	2%	2%	4%	2%
None Of These		n/a	n/a	67%	43%	37%	27%

What activities do our holidaymakers engage in?**

	2005	2006	2007	2008	2009	2010	2011
Fishing		1%	1%	0%	1%	0%	1%
Equestrian Pursuits		1%	3%	1%	1%	2%	2%
Cycling		1%	3%	2%	2%	4%	5%
Golf		5%	8%	3%	6%	6%	7%
Hiking/Cross-Country Walking		8%	14%	14%	24%	22%	19%
Other Water Based Activities		2%	2%	1%	1%	0%	3%

How much travelling do our holidaymakers do in Ireland?**

Regionality Segments	2005	2006	2007	2008	2009	2010	2011
Dublin Only		23%	25%	24%	30%	26%	24%
Tourer		51%	50%	48%	39%	43%	50%
Static Regional		9%	9%	10%	11%	13%	7%
Two Bases		16%	15%	17%	19%	17%	18%

What other countries do holidaymakers visit as part of their trip to the Republic of Ireland?**

Regions visited	2005	2006	2007	2008	2009	2010	2011
NI			3%	4%	3%	3%	2%
England/Isle of Man/Channel islands			16%	22%	13%	20%	20%
Scotland			4%	6%	7%	10%	13%
Wales			2%	2%	2%	2%	2%
France			5%	9%	6%	12%	12%
Germany			2%	6%	3%	6%	7%
Italy			2%	6%	4%	6%	7%
Benelux			3%	6%	4%	7%	6%
Scandinavia			1%	2%	2%	2%	2%
Other European			3%	6%	4%	6%	7%
Elsewhere			1%	2%	1%	1%	3%

%'s may not add to 100% due to rounding

Where do our holidaymakers come from?**

	2005	2006	2007	2008	2009	2010	2011
New England	18%	13%	10%	8%	16%	15%	19%
Mid Atlantic	18%	21%	21%	19%	14%	18%	20%
Mid West	18%	18%	21%	24%	23%	17%	20%
South	24%	23%	22%	27%	24%	27%	21%
West	21%	24%	25%	22%	23%	23%	20%

sources: Failte Ireland's Survey of Travellers (SOT) and NITB / NISRA's Northern Ireland Passenger Survey (NIPS)
** Tables annoted with two stars are extracted from the SOT only ,so while they include holidaymakers who travel to Northern Ireland via the Republic of Ireland,

** Tables annoted with two stars are extracted from the SOT only ,so while they include holidaymakers who travel to Northern Ireland via the Republic of Ireland,
holidaymakers using air or sea ports in Northern Ireland are not included in the statistics.

Ireland's Image

What are the top things Americans hope to see, do or experience in Ireland?

source: Tourism Ireland's Global Brand Tracker 2012 - 1000 Americans surveyed at home

What have first-time holidaymakers from the USA said about their holiday in Ireland?

source: Tourism Ireland's PromEx study 2007

Ireland has so much to offer. It has so much hidden beauty, simply touring the countryside is a wonderful experience' .

I imagined that it would be green and wet. In reality, Ireland exceeded my imagination in both respects. Nonetheless, my family had a wonderful trip.

We had no idea that the scenery along the southwest coast was so specticular. The food was wonderful (we had assumed it would be more like food in England and Scotland)

People were incredibly nice (we didn't expect people to be unfriendly, but just not that friendly). The country is extremely beautiful in every way - homes are remarkably well-maintained and the scenery is breathtaking in so many ways. I wished we would have planned to stay longer. Other than the U.S. dollar being quite weak, food prices were somewhat comparable with American prices. We very much want to return again.

Ireland has so much to offer. Though its not a country filled with flashy tourist attractions (which I dont care for), it has so much hidden beauty, simply touring the countryside is a wonderful experience. There is so much to offer while passing by - from castles to historical remains, the opportunities are endless.

What makes Ireland unique is actually a combination of things: its music, dance, people, countryside and history all considered together.

%'s may not add to 100% due to rounding

The best thing about Ireland is that there is not another place like it in the entire world - from the music and the people, to the food and the scenery, Ireland is 100% unique. There is history wherever you are and wherever you look. And for a traveler to experience the aura of Ireland, including the history, magic, and down to earth nature of the island - that is what makes your country so spectacular. We felt as though we were not just visitors, but we belonged, and maybe added a bit to your beautiful island history too.

Bed and Breakfasts - owners were so helpful in regards to any questions we had regarding itinerary and town history. EVERY SINGLE PERSON WE MET were so hospitable - it was the "nicest" country I've ever visited. I would live there if I could!

The country was far more cosmopolitan than expected, very sophistocated in cultural programs, and thoroughly delightful.

After their first holiday in Ireland, what do American holidaymakers say makes Ireland unique?

source: Tourism Ireland's PromEx study 2007

And what were the most memorable moments on their first holiday in Ireland?

source: Tourism Ireland's PromEx study 2007

%'s may not add to 100% due to rounding