

# Value of Overseas Tourism: Importance of US market





Number one source market by revenue



73%+ are holidaymakers



Long stay, high spend



**Consumer premium products and experiences** 



**Travel to the regions** 





### Value of Overseas Tourism: State of the Season and 2024 Outlook



Strong recovery in 2023; consumer demand for 2024 remains robust



**Premium market resilience** 



**Consumers spending more and staying longer** 



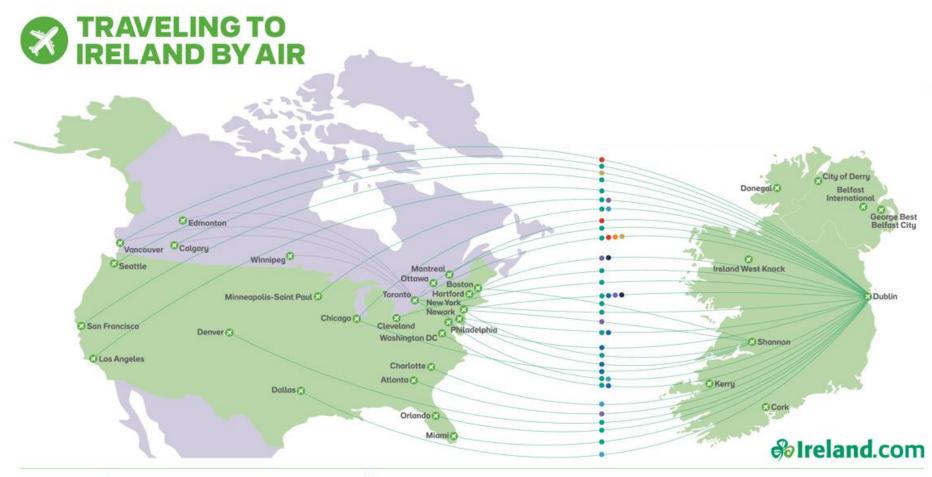
Consumers prioritising expenditure on travel



**Booking windows returned to pre-Covid levels** 



Competitiveness and inflation – impacting mid-market and group travel segments





### aerlingus.com

Boston (BOS) > Dublin

Boston (BOS) > Shannon (Seasonal)

Chicago (ORD) > Dublin

Cleveland (CLE) > Dublin

Denver (DEN) > Dublin (Starting April '24)

Deliver (DEIV) - Dubtili (Starting)

Hartford (BDL) > Dublin (Seasonal)

Los Angeles (LAX) > Dublin

New York (JFK) > Dublin

New York (JFK) > Shannon

Miami (MIA) > Dublin

Minneapolis-Saint Paul (MSP) > Dublin (Starting April '24)

Newark (EWR) > Dublin

Orlando (MCO) > Dublin

Philadelphia (PHL) > Dublin

San Francisco (SFO) > Dublin

Seattle (SEA) > Dublin

Washington (IAD) > Dublin

Toronto (YYZ) > Dublin

American Airlines \( \)

### aa con

Charlotte (CLT) > Dublin (Seasonal)

Chicago (ORD) > Dublin (Seasonal)

Dallas (DFW) > Dublin Philadelphia (PHL) > Dublin

O UNITED

### united com

Chicago (ORD) > Dublin (Seasonal)

Chicago (ORD) > Shannon (Seasonal)

Newark (EWR) > Dublin

Newark (EWR) > Shannon (Seasonal)

Washington (IAD) > Dublin (Seasonal)

### DELTA

### delta cor

Atlanta (ATL) > Dublin (Seasonal)

Boston (BOS) > Dublin (Seasonal)

Minneapolis-Saint Paul (MSP) > Dublin (Starting April '24)

New York (JFK) > Dublin

New York (JFK) > Shannon (Seasonal)

### jetBlue

jetblue.com

Boston (BOS) > Dublin (starting March 13th '24) New York (JKF) > Dublin (starting March 13th '24) AIR CANADA 
 aircanada.com

Toronto (YYZ) > Dublin

Vancouver (YVR) > Dublin (Seasonal)
Montreal (YUL) > Dublin (Seasonal)

• tränsat

airtransat.ca
Toronto (YYZ) > Dublin (Seasonal)

0 VVESTJETE

### westjet.com

Toronto (YYZ) > Dublin (Seasonal)

Calgary (YYC) > Dublin (Seasonal)



18 US Gateways

+108%

## **NEW FOR 2024**

Minneapolis (MSP) – DUB Denver (DEN) – DUB New York (JFK) – SNN

**JetBlue:**Boston (BOS) – DUB
New York (JFK) – DUB

# **Key Moments 2024**

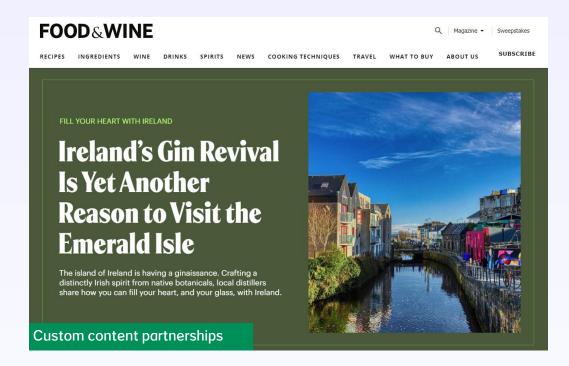
| Jan-Mar  | PGA Show   | Sales Mission – Western USA                                      |
|----------|--|--|
|          | Fill your heart with Ireland campaign – TV and digital (burst 1) | St Patrick's Day promotions                                      |
| Apr-Jun  | Sales Mission – East/Mid-West USA                                | ATTA AdventureElevate  |
|          | Proud Experiences, Los Angeles                                   | Golf campaign  |
| Jul-Sep  | GTM West and GTM   | Aer Lingus College Football Classic / ESPN                       |
|          | Virtuoso Travel Week   | College GameDay  |
|          | ILTM North America   | Fill your heart with Ireland campaign – TV and digital (burst 2) |
| Oct-Dec  | 'Home of Halloween' activity                                     |  |
|          | Luxury Summit  |  |
| All year | 'Always on' digital and social media activity                    | Press releases   |
|          | Trade webinars   | Consumer and trade ezines  |
|          | Media and influencer visits                                      |  |





# **Inspiring Visitors – Advertising**

- FYHWI TV and digital in key DMAs and gateways – building on strong Dec/Jan kickstart campaign
- 'Always on' digital and social activity
- Custom content partnerships' key themes: sustainability, off-season, regions, diversity
- St Patrick's Day integrated programme







FYHWI TV and CTV



## **Inspiring Visitors – Brand Partnerships**

- Targeted brand partnerships to reach our CC+ audience in new ways
- Aer Lingus College
   Football Classic ESPN
   GameDay show LIVE from
   Dublin
- Irish Arts Center partnership

# IAC NYC Irish Arts Center





## **COLLEGE GAMEDAY**

# THANKS FOR A GREAT SEASON!

WE RETURN AUGUST 24, 2024 LIVE FROM DUBLIN, IRELAND

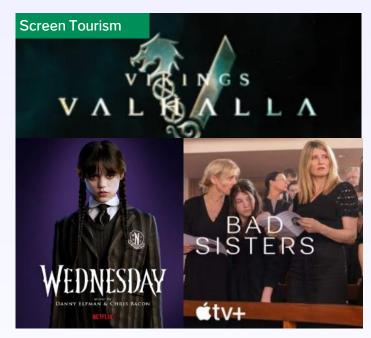


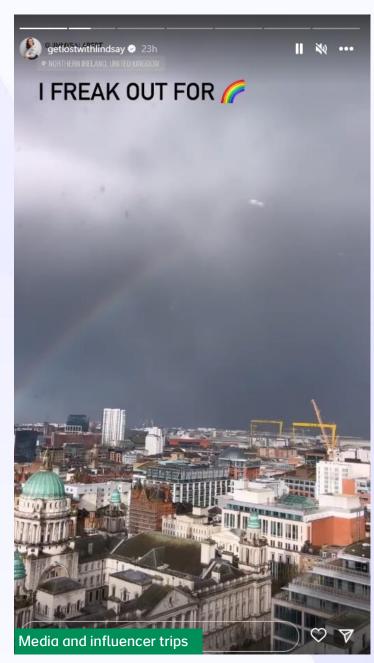


## **Inspiring Visitors – Publicity**

- Top tier broadcasts: PBS, NBC, ABC, CBS
- Satellite media tours –
   SPD and Halloween
- Year-long programme of media/influencer trips: sustainability, off-season, outdoor activities, luxury
- LGBTQIA The Outing, partnership with San Francisco Pride
- Screen Tourism











## Supporting Economies and Communities – Driving off-season and regional visits

- Promoting off-season festivals – SPD and Halloween
- PR 'content push' and press trips
- Belfast UNESCO City of Music
- 'Always on' digital and social activity
- Consumer campaigns
- Airline campaigns
- Trade communications programme promoting off-season, regional and sustainable travel experiences
- Travel trade fam trips seeing is believing!



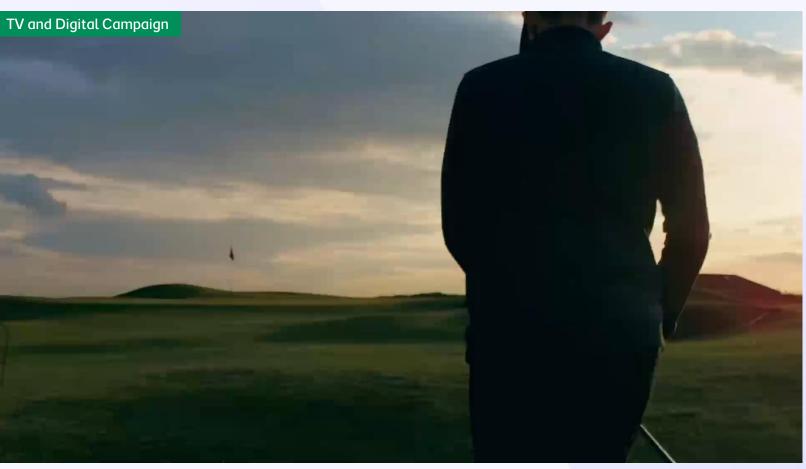


## **Supporting Economies and Communities – Golf Marketing**

- PGA Show, Orlando
- NBC Golf Channel TV/digital campaign
- Golf media fam trips
- Digital radio sponsorships
- Print and digital media partnerships







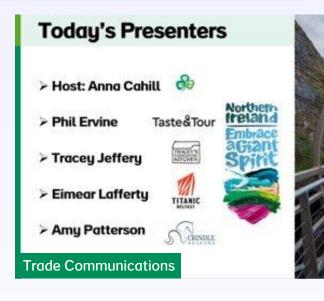


## **Strengthening Partnerships**

- Tour operator and airline co-op
- Best of Ireland sales missions
- Third-party travel trade events: Travel Leaders, Signature, Virtuoso, GTM and GTM West
- ATTA AdventureElevate
- Expanded luxury programme: LTA Ultra, ILTM North America, Luxury Summit, curated lunches and B2B digital comms
- Affinity group travel
- Trade communications educational programme and in-market events







## Strengthening Partnerships: how you can work with us

**In-market third-party events** 





**Trade communications** 



### **Webinars**



### Luxury programme





### **Media communications**







### Third-party digital opportunities







