Key Tourism Facts 2022

October 2023

Fáilte Ireland

Research

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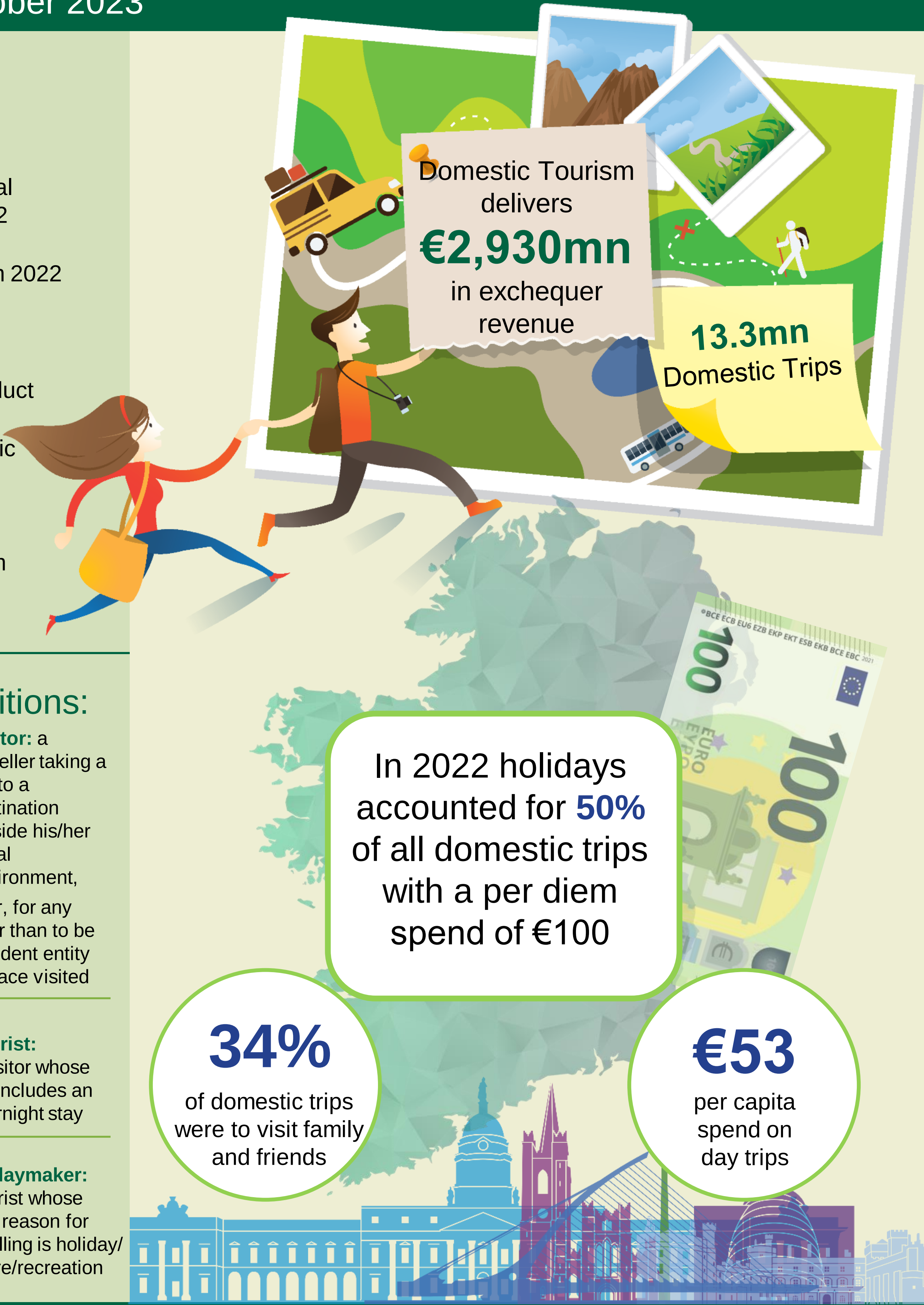

Domestic Tourism delivers **€2,930mn** in exchequer revenue

13.3mn Domestic Trips

In 2022 holidays accounted for **50%** of all domestic trips with a per diem spend of €100

34% of domestic trips were to visit family and friends

€53 per capita spend on day trips

Quick definitions:

Visitor: a traveller taking a trip to a destination outside his/her usual environment, for less than a year, for any main purpose other than to be employed by a resident entity in the country or place visited

Tourist: a visitor whose trip includes an overnight stay

Holidaymaker: a tourist whose main reason for travelling is holiday/leisure/recreation

Where did Domestic Tourists go in 2022?

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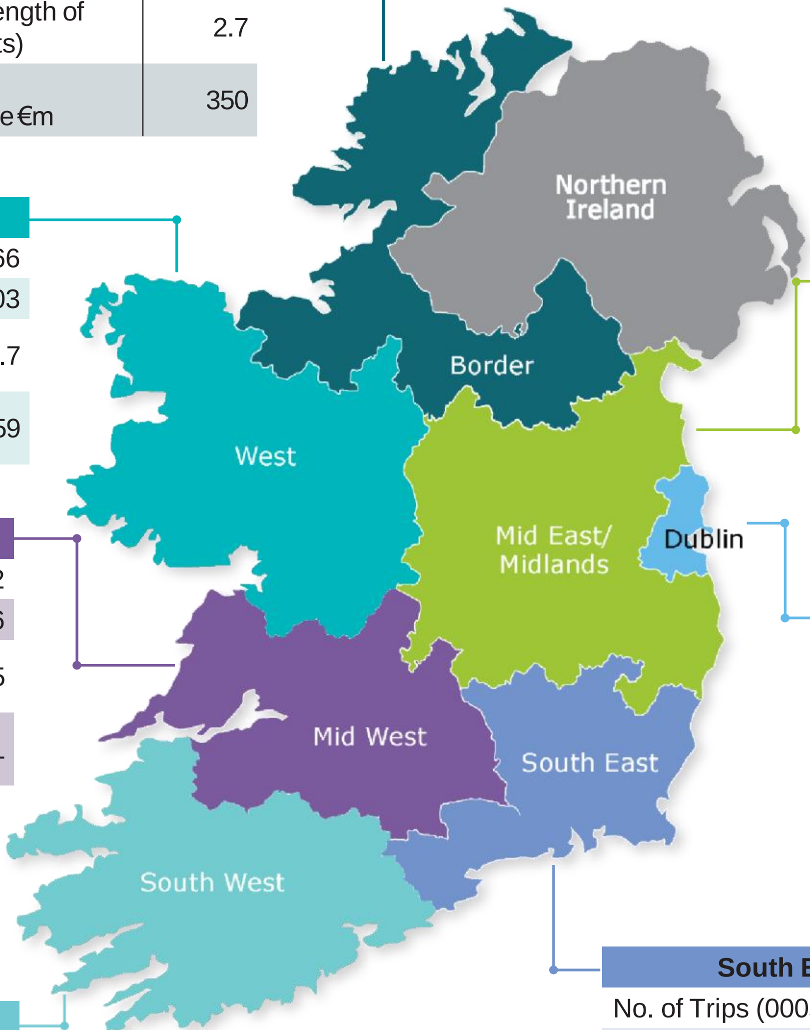
REGIONAL PERFORMANCE 2022

Border	
No. of Trips (000s)	1,606
No. of Nights (000s)	4,366
Average Length of Stay (Nights)	2.7
Estimated Expenditure €m	350

West	
No. of Trips (000s)	1,866
No. of Nights (000s)	5,003
Average Length of Stay (Nights)	2.7
Estimated Expenditure €m	459

Mid West	
No. of Trips (000s)	1,322
No. of Nights (000s)	3,276
Average Length of Stay (Nights)	2.5
Estimated Expenditure €m	261



Mid East/Midlands	
No. of Trips (000s)	1,957
No. of Nights (000s)	4,681
Average Length of Stay (Nights)	2.4
Estimated Expenditure €m	395

Dublin	
No. of Trips (000s)	1,861
No. of Nights (000s)	3,703
Average Length of Stay (Nights)	2.0
Estimated Expenditure €m	419

South West	
No. of Trips (000s)	2,763
No. of Nights (000s)	7,763
Average Length of Stay (Nights)	2.8
Estimated Expenditure €m	665

South East	
No. of Trips (000s)	1,899
No. of Nights (000s)	5,446
Average Length of Stay (Nights)	2.9
Estimated Expenditure €m	381

Source:CSO Household Survey 2022

NUTS 3 Region	County
Dublin	Dublin
Mid East/ Midlands	Kildare Louth Laois Longford Meath Offaly Westmeath Wicklow

NUTS 3 Region	County
South East	Carlow Kilkenny Waterford Wexford
South West	Cork Kerry
Mid West	Clare Limerick Tipperary

NUTS 3 Region	County
West	Galway Mayo Roscommon
Border	Cavan Donegal Leitrim Monaghan Sligo

Domestic Tourism in 2022

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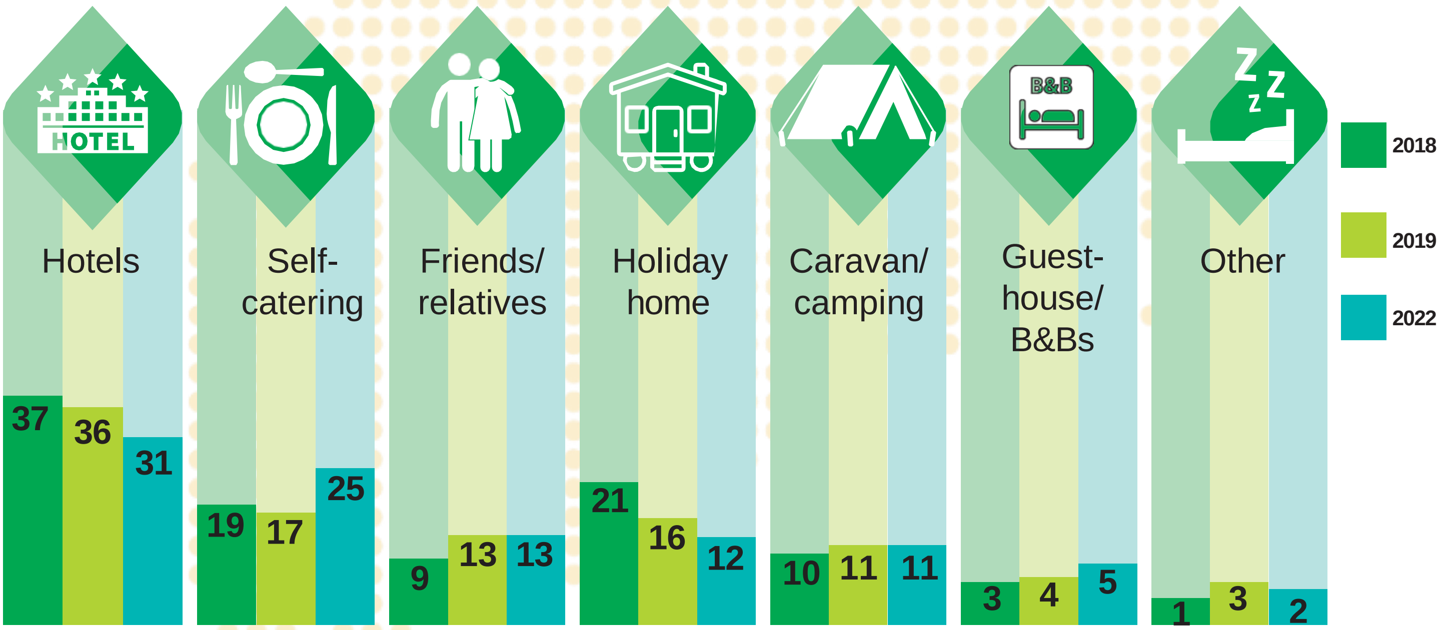
Domestic Trips (000s) By Purpose Of Travel	2018	2019	2022
Holiday trips	5,323	5,819	6,620
- Long (4+ nights)	998	1,152	1,437
- Short (1-3 nights)	4,326	4,666	5,183
Visiting friends/relatives trips	3,759	3,847	4,558
Business trips	473	551	528
Other trips	1,364	1,404	1,568
TOTAL TRIPS	**10,919**	**11,621**	**13,274**

Source: CSO Household Travel Surveys 2018-2019, 2022

Domestic Expenditure (€mn) By Purpose Of Travel	2018	2019	2022
Holiday trips	1,232.6	1,335.9	1,859.0
- Long (4+ nights)	392.4	414.1	607.6
- Short (1-3 nights)	840.2	921.8	1,251.2
Visiting friends/relatives trips	352.9	371.8	504.0
Business trips	116.9	124.9	172.0
Other trips	303.6	314.1	396.0
TOTAL EXPENDITURE	**2,006.0**	**2,146.6**	**2,930.0**

Source: CSO Household Travel Surveys 2018-2019, 2022

Accommodation Bednights - Domestic Holidaymakers (%)



Source: CSO Household Travel Surveys 2018-2019, 2022

Domestic Holidaymakers in 2022

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Seasonality (%)

JAN - MAR	APR - JUN	JUL - SEPT	OCT - DEC
16	27	40	16

Source: CSO Household Travel Survey 2022

Transport Used (%)

PRIVATE VEHICLE	BUS/RAIL	OTHER	AIR
87	11	2	*

Source: CSO Household Travel Survey 2022

(indicates less than 0.5 percent)*

Age Profile (%)

0-24 YEARS	25-34 YEARS	35-44 YEARS	45-54 YEARS	55-64 YEARS	65+ YEARS
30	15	19	15	11	9

Source: CSO Household Travel Survey 2022

Domestic Holidaymakers in 2022

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Activities Engaged In (%)

Activity	%
Hiking/ Walking <5km	54
Hiking/ Walking 5km+	13
Cycling Short Distance	6
Cycling Long Distance	3
Any Swimming	37
Any Watersports	6
Boat Tours	10
Adventure Park	10
Fishing/ Angling	4
Golf	6

Source: Consumer Planning & Insights, Failte Ireland

Leisure Experiences Engaged In (%)

Leisure Experience	%
Nature Reserve/ National Park	27
Farmers' Market/Food Producer	13
Gardens	27
Any Indoor Attractions	41
Historic House/ Castle	28
Visitor/ Interpretative Centre	16
Museum/ Gallery	15
Spa Treatment	15
Shopping	47
Touring by Car	48

Source: Consumer Planning & Insights, Failte Ireland

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Domestic Day Trips in 2022

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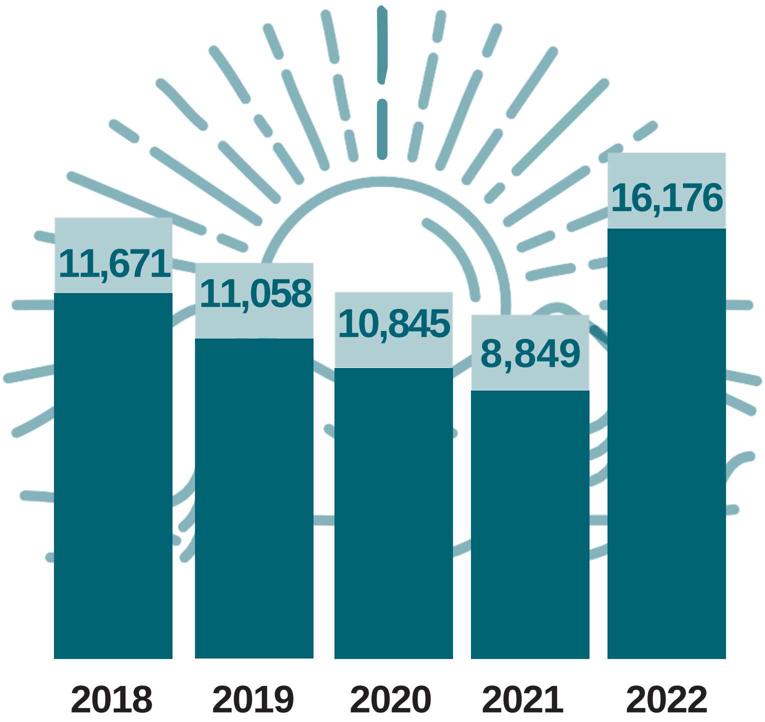
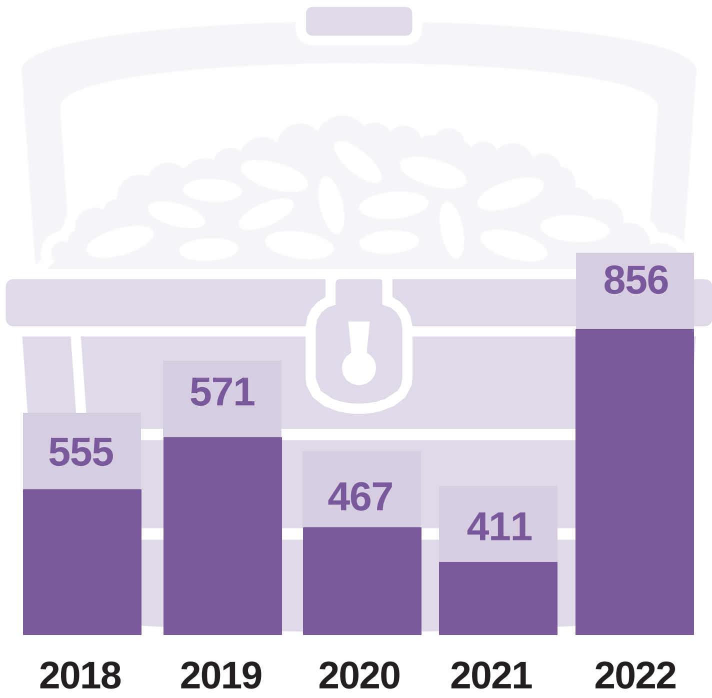
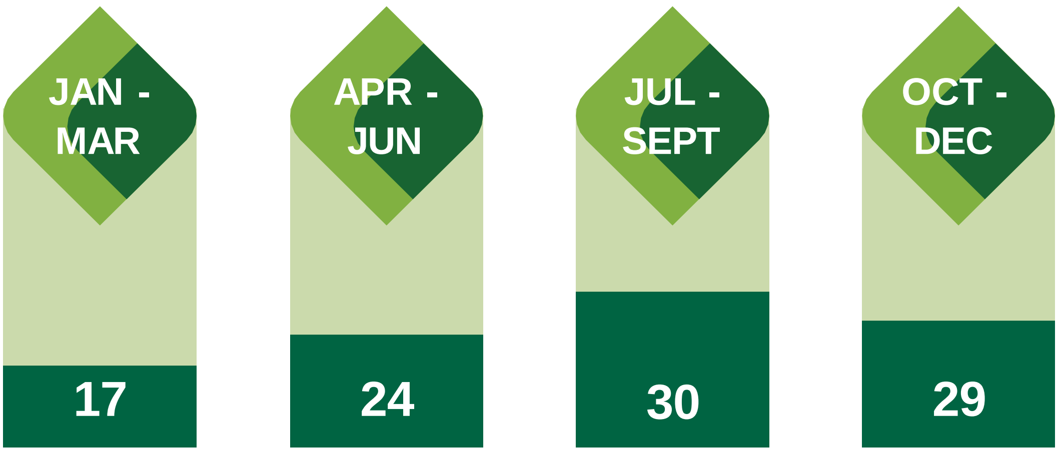
Number of Day Trips (000s) and Expenditure (€mn)





Source: CSO Household Travel Survey 2022

Seasonality of Day Trips (%)



Source: CSO Household Travel Survey 2022

The Tourism Product 2022

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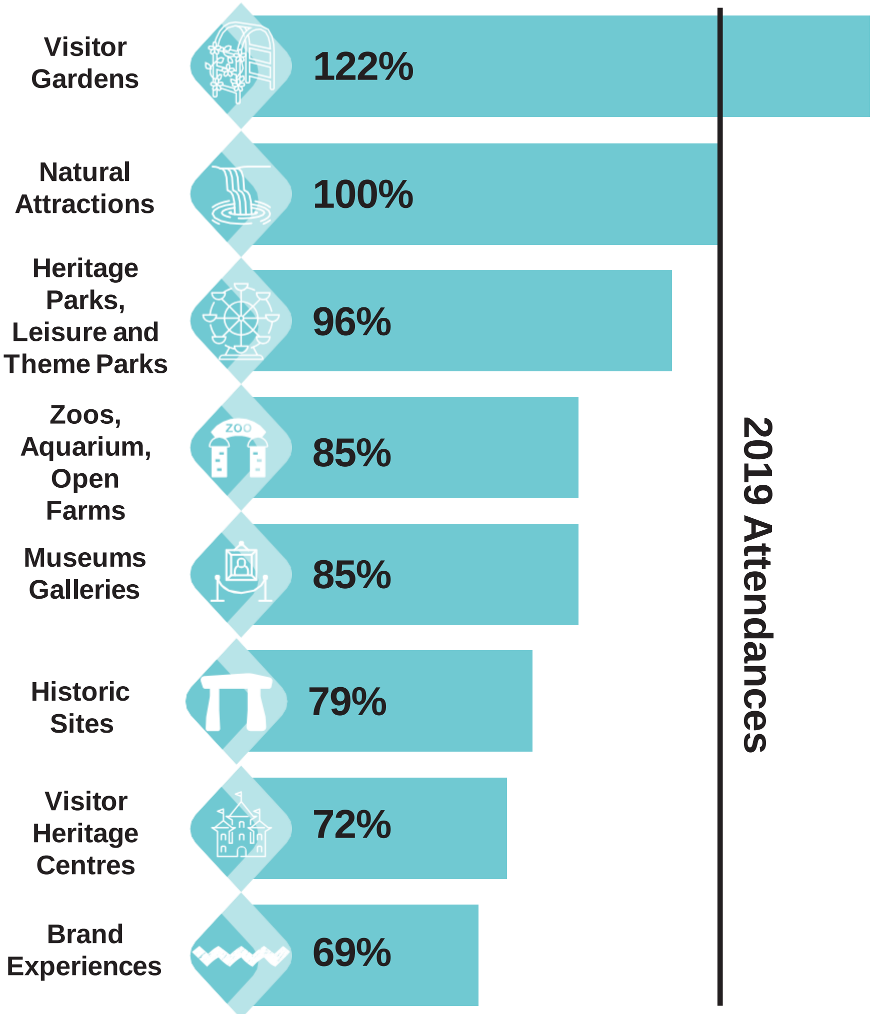
Accommodation

	Premises		Rooms	Room Occupancy %
	831	Hotels	62,828	73
	130	Guesthouses	1,814	64
	801	Bed and Breakfasts	3,302	52
	Premises/Units/Pitches		**Bed Spaces**	**Bed Occupancy %**
	1,561	Welcome Standard (premises)	18,291	45
	65	Hostels (premises)	5,968	65
	1,633	Self-Catering (units)	8,870	44
	84	Caravan & Camping (pitches)	30,236	34

Visitor Attractions

Performance of visitor attractions as a % of 2019 attendance



% of Attractions Open by Month 2022

Month	%
JANUARY	66%
FEBRUARY	71%
MARCH	81%
APRIL	87%
MAY	92%
JUNE	95%
JULY	97%
AUGUST	98%
SEPTEMBER	96%
OCTOBER	89%
NOVEMBER	80%
DECEMBER	77%

North America (Air)

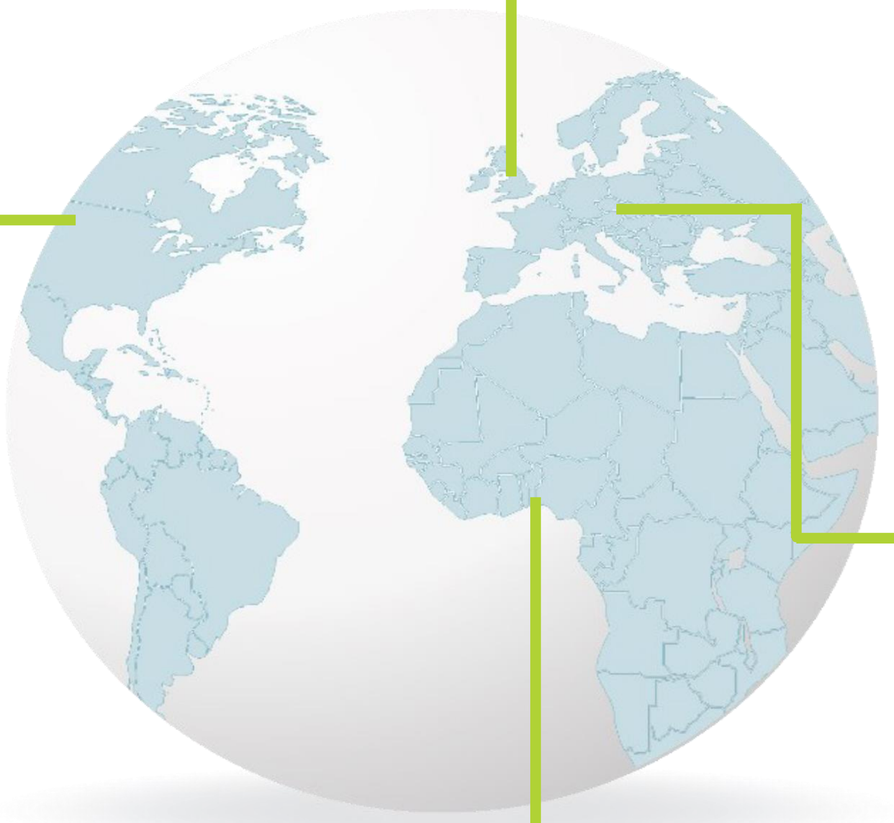
	☀	❄
Routes	19	14
Seats (000s)	51	37

Britain (Air)

	☀	❄
Routes	50	49
Seats (000s)	143	148

Britain (Sea)

	☀	❄
Routes	4	4
Passenger Capacity (000s)	115	104



Europe (Air)

	☀	❄
Routes	171	138
Seats (000s)	232	176

Europe (Sea)

	☀	❄
Routes	4	3
Passenger Capacity (000s)	17	9

Rest of World (Air)

	☀	❄
Routes	11	9
Seats (000s)	14	14

= Air Access = Sea Access ☀ = Summer Schedule ❄ = Winter Schedule

Data is based on weekly averages for each season.

ECONOMIC BENEFITS

Tourism is one of Ireland's most important industries, contributing to the economic and social fabric of the island. It is a leading creator of jobs and revenue, and one of the few sectors that has the potential to significantly benefit remote rural areas.

While traditional tourism statistics focus primarily on 'flows' (i.e., the number of visitors, the number of overnight stays, etc.), Gross Value Added (GVA) measures the overall contribution of a particular sector to national income. Tourism activity in Ireland is associated with over 4% of direct GVA.[1]

Because tourism is characterised by the fact that consumption takes place where the service is available, and tourism activity is frequently concentrated in areas which lack an intensive industry base, it is credited with having a significant regional distributive effect.

An essential element of the economic impact of tourism in a public policy context is the sector's contribution to Exchequer revenue. Total combined annual tax take from tourism activity was estimated at close to €3bn pre-pandemic, with VAT being the single most important source, followed by taxes on income.[2] This estimate is based on the direct, indirect and induced impacts. This arguably represents a conservative estimate of the total Exchequer impact as the absence of such activity would, for example, result in a notable increase in the cost of unemployment benefit.

EMPLOYMENT IN 'TOURISM INDUSTRIES'

The Central Statistics Office (CSO) now produces an alternative method of estimating employment from the traditional Labour Force Survey (LFS). This complementary series utilises the Revenue Commissioners' PAYE Modernisation tax data to develop a timely, objective employee headcount.[3] Estimates are available for what the CSO refers to as 'Tourism Industries', a more inclusive measure to that of Accommodation & Food Services that is derived from a list of activities developed by the statistical office of the European Union, Eurostat. Tourism Industries' employee headcount was estimated to be c.220,000 in Q3 2022.

Footnote 1: Tourism Satellite Accounts in Europe - 2023 edition (europa.eu) – 2019 latest available estimate
Footnote 2: Indecon Economic Consultants - Impact Assessment Model of the Economic Contribution of Tourism in Ireland (2023)
Footnote 3: PRSI classes S (self-employed) & M (primarily pensioners) are excluded from the headcount. For more see Background Notes - CSO - Central Statistics Office