

# TOURISM FACTS 2015

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*All estimates are based on information from the CSO's Country of Residence Survey (CRS), Passenger Card Inquiry (PCI) Survey and Household Travel Survey (HTS), NISRA's Northern Ireland Passenger Survey (NIPS), NISRA's Continuous Household Survey (CHS), Fáilte Ireland's Survey of Overseas Travellers (SOT), Port Survey of Holidaymakers, Accommodation Occupancy Survey, Visitor Attractions Survey, Domestic Omnibus Survey, and SouthWestern Tourism Services (Register of Accommodation).*

*Tourism Ireland is responsible for marketing the Island of Ireland overseas. Information on Tourism Ireland's marketing activities and the performance of overseas tourism to the island of Ireland is available on [www.tourismireland.com/corporate/](http://www.tourismireland.com/corporate/)*

## **TOURISM FACTS 2015**

Expenditure by tourists visiting Ireland (including receipts paid to Irish carriers by foreign visitors) was estimated to be worth €6 billion in 2015, this represents growth of 16% on 2014. Combining spending by international tourists with the money spent by Irish residents taking trips here, total tourism expenditure in 2015 was estimated to be €7.7 billion.

Overseas tourist visits to Ireland in 2015 grew by 13.1% to 8.0 million. Short haul markets, Britain and Mainland Europe recorded respective growth of 11.3% and 15.7%. North America and other long haul markets also performed very strongly, increasing by 12.9% and 11.7% respectively.

Britain remains our biggest source market for overseas tourists, representing 41.6% of all such visits. The next biggest source market is Mainland Europe, which accounts for 35.8% of international volume. Some 16.1% of overseas tourists come from North America. The balance, 6.4%, comes from other long haul markets.

### ***Economic benefits***

In 2015, out-of-state tourist expenditure amounted to €4.6 billion. With a further €1.3 billion spent by overseas visitors on fares to Irish carriers, foreign exchange earnings were €6 billion. Domestic tourism expenditure amounted to €1.7 billion, making tourism a €7.7 billion industry.

Government earned estimated revenue of €1.8 billion through taxation of tourism, of which €1.3 billion came from foreign tourism. In 2015 the tourism industry accounted for 3.5% of all tax revenue.

In 2015 the value of exported goods and services was estimated at €295.4 billion of which €6 billion can be directly attributed to tourism, accounting for 2.0% of export earnings. Being largely service based, tourism goods have low import content in comparison to other exports.

Total out-of-state and domestic tourism expenditure of €7.7 billion in 2015 represented 4.0% of GNP in revenue terms.

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.

### ***Direct employment in the tourism and hospitality industry***

The Central Statistics Office's official count of direct employment in 'Accommodation and food service activities', a category which includes hotels, restaurants, bars, canteens and catering, was 139,900 in 2015 (7.1% of total employment). This estimate of employment is based on the CSO Household Survey and the jobs identified are defined as 'the respondent's main job' and include both full-time and part-time.

Source: CSO Quarterly National Household Survey

Drawing on an alternative approach, an estimate of all jobs in the tourism and hospitality industry based on past Fáilte Ireland surveys of businesses (full-time, part-time, seasonal/casual and not confined to 'main' job) indicates total employment in the sector at approximately 220,000. This estimate includes an additional category of tourism services and attractions which is not covered by the CSO.

# Tourism Numbers 2012 – 2015

## Where did Ireland's tourists come from?

Numbers (000s)	2012	2013	2014	2015
<b>Britain</b>	<b>2,722</b>	<b>2,870</b>	<b>3,007</b>	<b>3,346</b>
<b>Mainland Europe</b>	<b>2,247</b>	<b>2,346</b>	<b>2,490</b>	<b>2,880</b>
France	384	409	420	471
Germany	437	466	535	609
Italy	240	226	246	304
Spain	239	249	274	322
Netherlands	137	148	151	174
Belgium	82	95	99	121
Denmark	42	51	55	66
Sweden	70	72	60	64
Switzerland	78	73	84	105
Austria	46	51	57	53
Norway	48	50	50	58
Poland	159	152	140	161
All Other Europe	284	306	318	373
<b>North America</b>	<b>940</b>	<b>1,039</b>	<b>1,146</b>	<b>1,294</b>
USA	833	924	1,005	1,129
Canada	107	115	140	165
<b>Rest of World</b>	<b>378</b>	<b>431</b>	<b>462</b>	<b>516</b>
Australia, New Zealand & Other Oceania	158	192	191	205
Other Areas	219	240	271	312
<b>Total Overseas</b>	<b>6,286</b>	<b>6,686</b>	<b>7,105</b>	<b>8,036</b>
Northern Ireland <sup>1</sup>	1,299	1,572	1,708	1,492
<b>Total out-of-state</b>	<b>7,585</b>	<b>8,258</b>	<b>8,813</b>	<b>9,528</b>
Domestic trips <sup>2</sup>	8,291	8,413	8,991	9,125

Source surveys are designed to measure area of residence groupings (bold figures). Figures in italics are indicative of approximate overall market size but do not provide a sufficient level of precision to accurately reflect absolute market size or trends over time.

Source: CSO/Fáilte Ireland/TSB, NISRA

<sup>1</sup> Revised by NISRA May 2015

<sup>2</sup> 2012-2015 domestic data revised due to new methodological approach by CSO, August 2016

# Tourism Revenue 2012 – 2015

*How much money did they spend?*

Revenue (€m)	2012	2013 <sup>3</sup>	2014	2015
<b>Britain</b>	<b>857.9</b>	<b>890.9</b>	<b>926.7</b>	<b>1,017.9</b>
<b>Mainland Europe</b>	<b>1,060.5</b>	<b>1,228.2</b>	<b>1,301.2</b>	<b>1,555.3</b>
<b>North America</b>	<b>745.7</b>	<b>829.0</b>	<b>940.3</b>	<b>1,199.7</b>
<b>Other Overseas</b>	<b>291.6</b>	<b>367.7</b>	<b>428.1</b>	<b>492.6</b>
<b>TOTAL OVERSEAS</b>	<b>2,955.8</b>	<b>3,315.7</b>	<b>3,596.4</b>	<b>4,265.3</b>
Northern Ireland <sup>4, 5</sup>	292.3	304.5	334.4	351.2
<b>TOTAL OUT-OF-STATE</b>	<b>3,248.1</b>	<b>3,620.3</b>	<b>3,930.7</b>	<b>4,616.5</b>
Carrier receipts <sup>6</sup>	856.0	976.0	1,166.0	1,322.0
Overseas same-day visits	34.0	35.0	41.0	38.0
<b>TOTAL FOREIGN EXCHANGE EARNINGS</b>	<b>4,138.1</b>	<b>4,631.3</b>	<b>5,137.7</b>	<b>5,976.5</b>
Domestic trips <sup>7</sup>	1,514.2	1,533.0	1,713.5	1,725.3
<b>TOTAL TOURISM REVENUE</b>	<b>5,652.3</b>	<b>6,164.3</b>	<b>6,851.2</b>	<b>7,701.8</b>

*Source surveys are designed to measure area of residence groupings (bold figures).*

*Source: CSO/Fáilte Ireland/TSB NISRA/Central Bank of Ireland*

## Revenue – some useful figures

### ***Per diems – spend per person per day***

Overseas tourists	€68
Overseas holidaymakers	€89
Domestic overnight trips	€73

For every euro spent on tourism (domestic and overseas), 23c is generated in tax.

## Employment – some useful figures

Every €1mn of tourist expenditure helps to support 29 tourism jobs.  
1,000 additional tourists support 14 jobs in the tourism industry.

<sup>3</sup> Revised March 2014

<sup>4</sup> NISRA GBP: Northern Ireland resident expenditure data provided in STÉ from 2009 onwards. Euro exchange rate 2015-0.72585 Source: Central Bank of Ireland

<sup>5</sup> 2012,2013 Revised by NISRA May 2015

<sup>6</sup> 2012 carrier receipts revised March 2014, 2013 and 2014 revised March 2016

<sup>7</sup> 2012-2015 domestic data revised due to new methodological approach by CSO, August 2016

# Regional Visits and Revenue 2015

Where did tourists go in 2015?

Numbers (000s) Revenue (€m)	Britain	Mainland Europe	North America	Other Areas	All Overseas	Northern Ireland <sup>8,9</sup>	Domestic Trips
Dublin	1,594	1,987	980	376	4,937	391	1,599
	322.9	657.3	457.0	289.0	1,726.2	81.6	263.8
East & Midlands	431	341	109	41	922	223	1,319
	116.7	119.0	62.0	26.0	323.7	52.4	216.5
South-East	298	290	215	73	876	46	1,318
	90.8	84.1	55.0	29.0	258.9	9.6	258.1
South-West	632	808	490	174	2,104	94	1,746
	191.3	333.5	209.0	58.0	791.8	48.8	389.6
Shannon	302	419	342	85	1,148	n/a	890
	88.6	99.2	144.0	35.0	366.8	n/a	138.6
West	331	690	436	133	1,590	146	1,482
	101.6	203.9	229.0	40.0	574.5	53.8	315.1
North-West	302	239	110	43	694	591	771
	105.9	58.2	43.0	17.0	224.1	104.9	143.7

Source: CSO/Fáilte Ireland NISRA/Central Bank of Ireland

## Overseas Tourists in 2015

How did overseas tourists spend their money in Ireland?

Breakdown of spend in Ireland (%)	Total	Britain	Mainland Europe	North America	Rest of World
Bed & board	31	28	33	32	27
Other food & drink	33	39	31	32	32
Sightseeing/entertainment	7	6	8	7	8
Internal transport	13	13	12	14	12
Shopping	14	12	14	13	18
Miscellaneous	2	2	2	3	2

When did they arrive?

Seasonality (%)	Total	Britain	Mainland Europe	North America	Rest of World
January-March	18	20	17	13	16
April	8	8	9	7	7
May	10	9	10	10	9
June	10	8	10	14	10
July	11	10	11	13	12
August	12	11	12	12	12
September	9	9	9	11	10
October-December	23	25	22	20	24

Source: Fáilte Ireland estimates based on CSO

<sup>8</sup> Source: NISRA GBP; Euro exchange rates 2015 - 0.72585 Source: Central Bank of Ireland

<sup>9</sup> Shannon n/a- insufficient survey response level to support an estimate

### How did they arrive/depart?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
<b>Air</b>					
From Britain	37	74	5	22	32
From Mainland Europe	37	1	87	18	28
Transatlantic	11	1	1	56	2
Asia/Middle East	2	-	-	-	29
<b>Sea</b>					
From Britain	9	17	3	2	6
From Mainland Europe	1	*	3	-	-
<b>Via N. Ireland</b>	3	7	1	1	4

Source: CSO (\* indicates less than 0.5 percent)

### Where did they stay? (distribution of bednights)

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Hotels	19	23	14	28	16
Guesthouses/B&Bs	6	4	8	7	3
Self-catering	23	10	25	25	32
Caravan & camping	1	1	2	*	*
Hostels	3	1	4	3	3
Friends/relatives	26	54	18	21	22
Other	22	7	29	16	24
Nights (Million)	62.5	16.4	26.7	11.8	7.6

Source: SOT

Source (CSO)

(\* indicates less than 0.5 percent)

### What activities did they engage in?

	Overseas Participants (000s)
Hiking/cross country walking	1,674
Cycling	355
Golf	198
Angling	163
Equestrian	75

### What was their main reason for visiting Ireland?

(000s)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	4,036	1,254	1,612	926	243
Visit friends/relatives	2,374	1,412	591	201	169
Business	1,273	618	469	115	72
Other	353	61	209	51	32

Source: CSO and NISRA

In 2015, less than 3 in ten (29%) of those coming to Ireland to visit friends/relatives were born in Ireland.

# Overseas Holidaymakers 2015

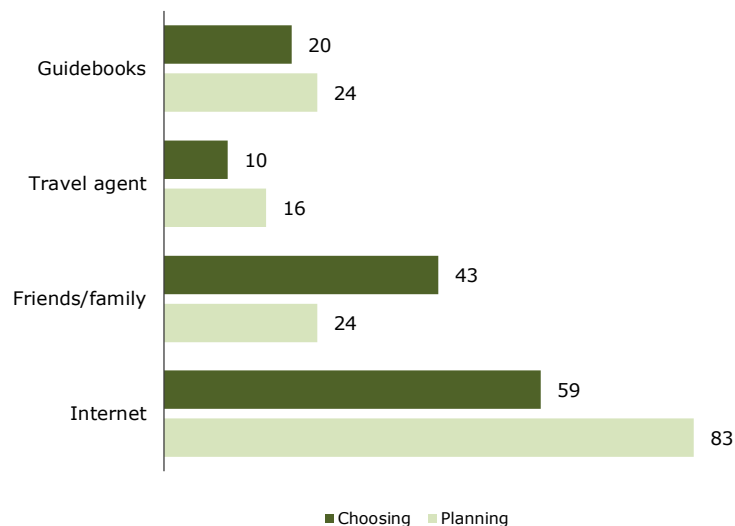
Holidaymakers in this section are defined as tourists who stated that their primary purpose for visiting Ireland was a holiday.

## What was the total number of holidaymakers in 2015?

Holidaymakers (000s)	2010	2011	2012	2013	2014	2015
Britain	896	961	941	979	1,057	1,254
Mainland Europe	971	1,041	1,120	1,227	1,314	1,612
North America	546	591	634	718	803	926
Rest of World	137	167	184	220	219	243
Total	2,549	2,760	2,879	3,144	3,393	4,036

Source: CSO and NISRA

## Sources of information for choosing/planning a holiday in Ireland (%)



Source: Fáilte Ireland's Post Survey of Holidaymakers 2015

## How did they arrange their holiday?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Package*	16	10	14	24	15
Independent	84	90	86	76	85

\* Prepaid an inclusive price for fares to/from Ireland and at least one other element of the holiday.

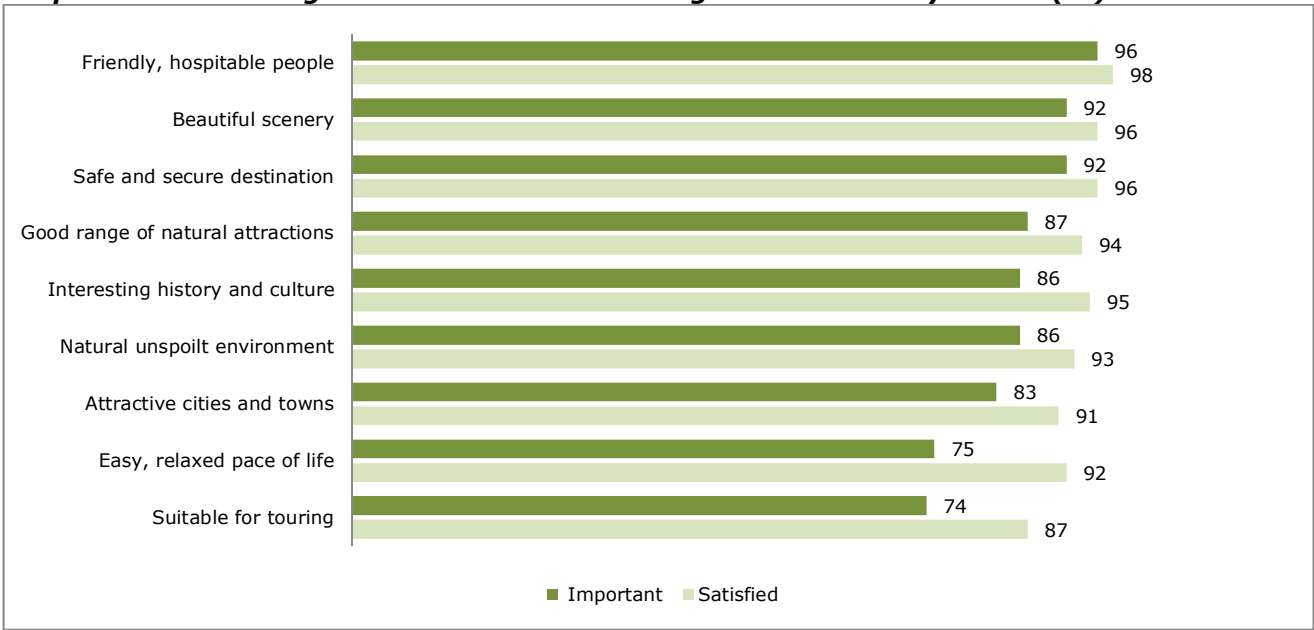
Source: Fáilte Ireland's Survey of Overseas Travellers

## What were the characteristics of holidaymakers to Ireland (%)?

Experience of Ireland	Use of car	Age	Social class	Party composition
First visit	Car brought 12	Under 25 years 21	Managerial/professional (AB) 28	Alone 21
Repeat	Car hired 32	25-34 years 24	White collar (C1) 55	Couple 43
Irish-born	Car not used 56	35-44 years 13	Skilled worker (C2) 13	Family 14
		45+ years 43	Unskilled worker (DE) 3	Other adult group 22

Source: Fáilte Ireland's Survey of Overseas Travellers

**Importance and rating of destination issues among overseas holidaymakers (%)**



Source: Fáilte Ireland's Port Survey of Overseas Holidaymakers 2015



# Domestic Tourism in 2015<sup>10</sup>

## Domestic trips (000s) by purpose of travel

	2012	2013	2014	2015
Holiday trips	4,036	4,073	4,436	4,658
- Long (4+ nights)	918	1,088	1,144	1,078
- Short (1-3 nights)	3,118	2,985	3,292	3,580
Visiting friends/relatives trips	2,765	2,988	2,918	2,921
Business trips	350	364	453	407
Other trips	1,140	988	1,184	1,138
<b>Total trips</b>	<b>8,291</b>	<b>8,413</b>	<b>8,991</b>	<b>9,125</b>

Source: CSO Household Travel Surveys 2012-2015

## Domestic expenditure (€m) by purpose of travel

	2012	2013	2014	2015
Holiday trips	876.2	947.2	992.8	1,070.4
- Long (4+ nights)	311.9	395.2	385.6	394.2
- Short (1-3 nights)	564.3	552.0	607.1	676.2
Visiting friends/relatives trips	289.6	284.8	327.0	296.5
Business trips	80.5	84.2	110.3	98.0
Other trips	268.0	216.8	283.4	260.4
<b>Total expenditure</b>	<b>1,514.2</b>	<b>1,533</b>	<b>1,713.5</b>	<b>1,725.3</b>

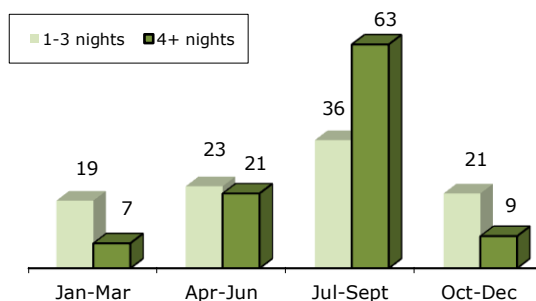
Source: CSO Household Travel Surveys 2012-2015

## Accommodation bednights domestic holidaymakers (%)

	2012	2013	2014	2015
Hotels	37	34	34	35
Guesthouse/B&Bs	3	3	4	4
Caravan/camping	12	15	14	7
Self-catering	20	22	23	22
Holiday home	12	15	12	19
Friends/relatives	13	10	13	10
Other	2	1	1	3

Source: CSO Household Travel Surveys 2012-2015

## Seasonality of holidaymakers (%) 2015 by length of stay



Source: CSO Household Travel Survey 2015

### **Activities engaged in by domestic holidaymakers (%)**

Houses/castles	26
Hiking/walking	23
National parks	22
Gardens	21
Visits to spas	20
Watersports (excluding swimming)	18
Heritage/ interpretive centres	18
Monuments	16
Museums/art galleries	15
Cycling	7
Golf	7
Angling	4
Attending horse racing	3
Equestrian pursuits	1

Source: Fáilte Ireland Domestic Omnibus 2015

## **The Tourism Product**

### **Accommodation in 2015**

	<b>Premises</b>	<b>Rooms</b>
Hotels	798	56,240
Guesthouses	226	2,835
Bed and Breakfasts*	1,324	5,568
Self-Catering (group scheme only - units)	3,346	n/a
Hostels (beds)	110	7,989
Caravan & camping (pitches)	93	5,312

Source: SouthWestern Tourism Services

\* includes specialist and pub accommodation

### **Accommodation occupancy in 2015**

	<b>%</b>
Hotel Room Occupancy	70
Guesthouse Room Occupancy	61
B&Bs Room Occupancy	40
Hostels Bed Occupancy	64
Group Scheme Self-Catering Bed Occupancy	30
Caravan and Camping Bed Occupancy	24

Source: Fáilte Ireland Occupancy Surveys

## Attendance at popular visitor attractions in Ireland 2015

Top Fee-Charging Attractions			Top Free Attractions		
Name of Attraction	County	2015	Name of Attractions	County	2015
Guinness Storehouse	Dublin	1,498,124	The National Gallery of Ireland	Dublin	718,637
Cliffs of Moher Visitor Experience	Clare	1,251,574	National Botanic Gardens	Dublin	553,348
Dublin Zoo	Dublin	1,105,005	Irish Museum of Modern Art	Dublin	485,702
National Aquatic Centre	Dublin	991,554	National Museum of Ireland - Archaeology, Kildare St	Dublin	457,057
Book of Kells	Dublin	767,996	Doneraile Wildlife Park	Cork	432,180
Tayto Park	Meath	750,000	Farmleigh	Dublin	410,076
St Patrick's Cathedral	Dublin	532,042	Science Gallery at Trinity College Dublin	Dublin	409,891
Fota Wildlife Park	Cork	436,386	Newbridge Silverware Museum of Style Icons	Kildare	350,000
Blarney Castle	Cork	400,000	Chester Beatty Library	Dublin	343,929
Bunratty Castle & Folk Park	Clare	341,685	National Museum of Ireland - Natural History, Merrion St	Dublin	320,528
Kilmainham Gaol	Dublin	326,635	National Museum of Ireland - Decorative Arts & History, Collins Barracks	Dublin	295,820
Rock of Cashel	Tipperary	300,749	Holy Cross Abbey	Tipperary	210,000
Kylemore Abbey & Garden	Galway	300,000	Connemara National Park	Galway	190,753
Castletown House & Parklands	Kildare	297,691	Dublin City Gallery The Hugh Lane	Dublin	190,000
Kilkenny Castle	Kilkenny	282,588	Sliabh Liag Cliffs	Donegal	185,760
Old Jameson Distillery	Dublin	282,056	Crawford Art Gallery	Cork	175,902
Powerscourt House & Gardens	Wicklow	249,475	Galway City Museum	Galway	174,556
Dublin Castle	Dublin	231,178	Drumcliffe Church & Audio Visual Presentation	Sligo	160,000
Christ Church Cathedral	Dublin	195,888	Malin Head Viewing Point	Donegal	154,760
The House of Waterford Crystal	Waterford	177,000	Nicholas Mosse Pottery	Kilkenny	125,000
Glenveagh Castle and Grounds	Donegal	170,797	National Museum of Ireland - Country Life, Turlough Park	Mayo	119,839

Source: Fáilte Ireland Visitor Attraction Survey 2015