

TOURISM FACTS 2015

PRELIMINARY

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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/

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%. Combining spending by international tourists with the money spent by Irish residents taking trips here, total tourism expenditure in 2015 was estimated to be €7.5 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.

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 205,000. This estimate includes an additional category of tourism services and attractions which is not covered by the CSO.

Tourism Numbers 2010 – 2015

Where did Ireland's tourists come from?

Numbers (000s)	2010 ¹	2011 ²	2012	2013	2014	2015
Britain	2,759	2,799	2,722	2,870	3,007	3,346
Mainland Europe	2,011	2,184	2,247	2,346	2,490	2,880
France	344	381	384	409	420	471
Germany	381	411	437	466	535	609
Italy	214	214	240	226	246	304
Spain	214	233	239	249	274	322
Netherlands	120	133	137	148	151	174
Belgium	65	83	82	95	99	121
Denmark	43	46	42	51	55	66
Sweden	53	57	70	72	60	64
Switzerland	54	68	78	73	84	105
Austria	41	44	46	51	57	53
Norway	45	51	48	50	50	58
Poland	166	161	159	152	140	161
All Other Europe	270	302	284	306	318	373
North America	864	904	940	1,039	1,146	1,294
USA	780	811	833	924	1,005	1,129
Canada	83	93	107	115	140	165
Rest of World	311	353	378	431	462	516
Australia, New Zealand & Other Oceania	135	143	158	192	191	205
Other Areas	176	209	219	240	271	312
Total Overseas	5,945	6,240	6,286	6,686	7,105	8,036
Northern Ireland ³	n/a	1,420	1,299	1,572	1,708	1,492
Total out-of-state	n/a	7,660	7,585	8,258	8,813	9,528
Domestic trips ⁴	7,300	7,169	7,031	7,111	7,354	7,529

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

1 Revised February 2014

2 Revised by CSO in 2013

3 Revised by NISRA May 2015

4 2010 and 2011 revised by CSO in 2013

Tourism Revenue 2010 – 2015

How much money did they spend?

Revenue (€m)	2010	2011 ⁵	2012	2013 ⁶	2014	2015
Britain	879.4	858.3	857.9	890.9	926.7	1,017.9
Mainland Europe	1,133.9	1,110.8	1,060.5	1,228.2	1,301.2	1,555.3
North America	695.1	677.4	745.7	829.0	940.3	1,199.7
Other Overseas	290.4	272.8	291.6	367.7	428.1	492.6
TOTAL OVERSEAS	2,998.8	2,919.4	2,955.8	3,315.7	3,596.4	4,265.3
Northern Ireland ^{7, 8}	n/a	296.7	292.3	304.5	334.4	351.2
TOTAL OUT-OF-STATE	n/a	3,216.1	3,248.1	3,620.3	3,930.7	4,616.5
Carrier receipts ⁹	580.0	626.0	856.0	976.0	1,166.0	1,322
Overseas same-day visits	25.0	36.0	34.0	35.0	41.0	38.0
TOTAL FOREIGN EXCHANGE EARNINGS¹⁰	n/a	3,878.1	4,138.1	4,631.3	5,137.7	5,976.5
Domestic trips ¹¹	1,560.5	1,415.9	1,345.4	1,373.2	1,464.0	1,529.9
TOTAL TOURISM REVENUE	5,164.3	5,294.0	5,483.5	6,004.5	6,601.7	7,506.4

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 visitors	€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.

⁵ Revised by CSO in 2013

⁶ Revised March 2014

⁷ NISRA GBP: Northern Ireland resident expenditure data provided in STÉ from 2009 onwards. Euro exchange rate 2014-0.80612 Source: Central Bank of Ireland

⁸ 2011, 2012, 2013 Revised by NISRA May 2015

⁹ 2012 carrier receipts revised March 2014 2013 and 2014 revised March 2016

¹⁰ Foreign exchange earnings in 2009 and 2010 exclude revenue from Northern Ireland visitors

¹¹ 2010 and 2011 revised by CSO in 2013

Regional Visits and Revenue 2015

Where did visitors go in 2015?

Numbers (000s) Revenue (€m)	Britain	Mainland Europe	North America	Other Areas	All Overseas	Northern Ireland ¹²	Domestic Trips
Dublin	1,594	1,987	980	376	4,937	391	1,391
	322.9	657.3	457.0	289.0	1,726.2	81.6	257.9
East & Midlands	431	341	109	41	922	223	1,004
	116.7	119.0	62.0	26.0	323.7	52.4	170.8
South-East	298	290	215	73	876	46	1,085
	90.8	84.1	55.0	29.0	258.9	9.6	222.5
South-West	632	808	490	174	2104	94	1,419
	191.3	333.5	209.0	58.0	791.8	48.8	335.9
Shannon	302	419	342	85	1148	0	733
	88.6	99.2	144.0	35.0	366.8	0.0	127.6
West	331	690	436	133	1,590	146	1,283
	101.6	203.9	229.0	40.0	574.5	53.8	293.3
North-West	302	239	110	43	694	591	614
	105.9	58.2	43.0	17.0	224.1	104.9	121.8

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

How did they arrive/depart?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Air					
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
Sea					
From Britain	9	17	3	2	6
From Mainland Europe	1	*	3	-	-
Via N. Ireland	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
Source: SOT					
Nights (Million)	62.5	16.4	26.7	11.8	7.6
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

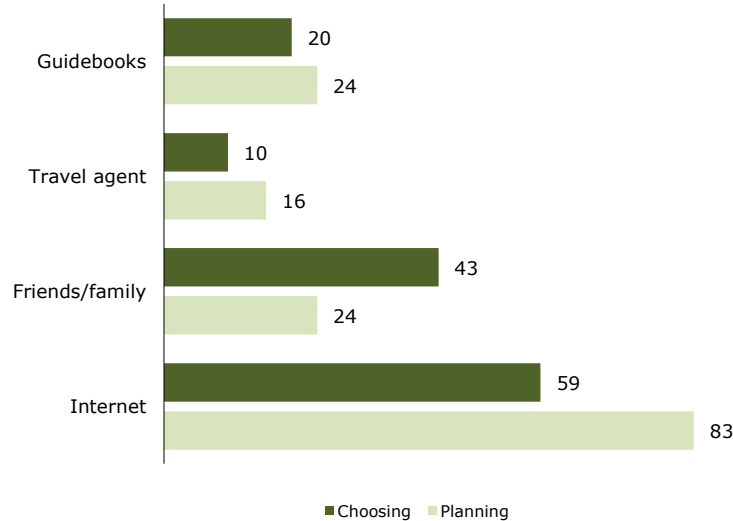
Holidaymakers in this section are defined as visitors who stated that their primary purpose for visiting Ireland was a holiday.

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.

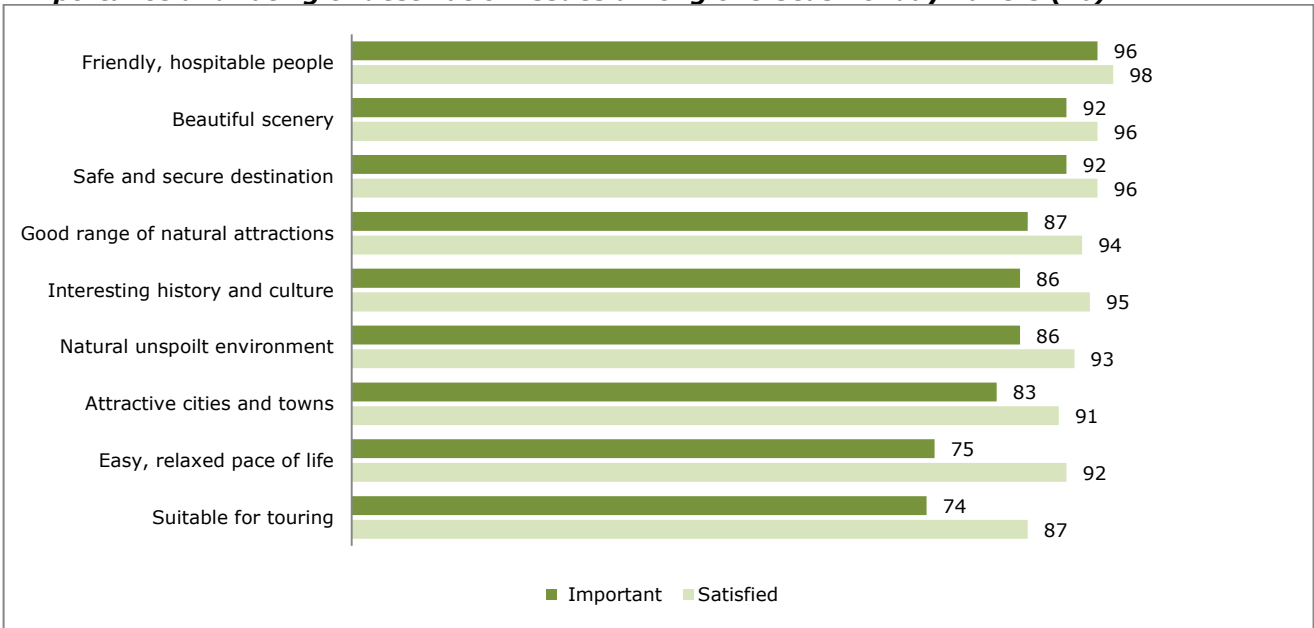
Source: Fáilte Ireland's Survey of Overseas Travellers

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

Experience of Ireland	Use of car	Age	Social class	Party composition					
First visit	61	Car brought	12	Under 25 years	21	Managerial/professional (AB)	28	Alone	21
Repeat	37	Car hired	32	25-34 years	24	White collar (C1)	55	Couple	43
Irish-born	2	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 2015¹³

Domestic trips (000s) by purpose of travel

	2010	2011	2012	2013	2014	2015
Holiday trips	3,978	3,696	3,374	3,460	3,583	3,815
- Long (4+ nights)	1,151	1,040	780	920	913	910
- Short (1-3 nights)	2,828	2,656	2,594	2,541	2,670	2,904
Visiting friends/relatives trips	1,997	2,231	2,374	2,452	2,423	2,411
Business trips	370	350	322	341	402	350
Other trips	955	891	960	858	947	953
Total trips	7,300	7,169	7,031	7,111	7,354	7,529

Source: CSO Household Travel Surveys 2010-2015

Domestic expenditure (€m) by purpose of travel

	2010	2011	2012	2013	2014	2015
Holiday trips	971.9	864.9	784.8	840.3	852.0	938.6
- Long (4+ nights)	394.2	348.6	290.9	348.0	328.5	576.5
- Short (1-3 nights)	577.7	516.3	493.9	492.2	523.5	362.1
Visiting friends/relatives trips	270.5	265.9	269.6	266.7	302.2	278.1
Business trips	85.9	76.9	75.7	78.4	98.3	83.9
Other trips	232.2	208.2	215.3	187.9	211.5	229.2
Total expenditure	1,560.5	1,415.9	1,345.4	1,373.3	1,464.0	1,529.9

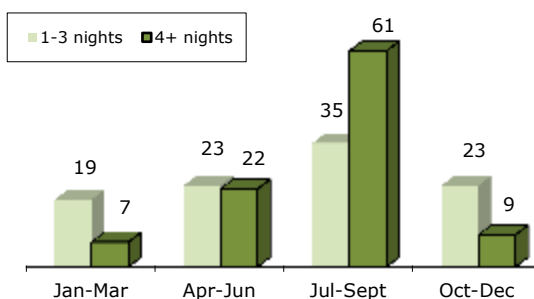
Source: CSO Household Travel Surveys 2010-2015

Accommodation bednights domestic holidaymakers (%)

	2010	2011	2012	2013	2014	2015
Hotels	32	32	39	36	36	37
Guesthouse/B&Bs	3	3	4	3	4	5
Caravan/camping	17	13	11	14	13	6
Self-catering	17	20	18	20	21	20
Holiday home	19	20	13	16	14	19
Friends/relatives	10	9	13	10	11	10
Other	2	2	2	2	1	3

Source: CSO Household Travel Surveys 2010-2015

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

	Premises	Rooms
Hotels	798	56,240
Guesthouses	226	2,835
Bed and Breakfast*	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