

# TOURISM FACTS 2014

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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), 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 2014**

Expenditure by tourists visiting Ireland (including receipts paid to Irish carriers by foreign visitors) was estimated to be worth €5.1 billion in 2014, this represents growth of 10%. Combining spending by international tourists with the money spent by Irish residents taking trips here, total tourism expenditure in 2014 was estimated to be €6.6 billion.

Overseas tourist visits to Ireland in 2014 grew by 6% to 7.1 million. Short haul markets, Britain and Mainland Europe recorded respective growth of 4.7% and 6.1%. North America and other long haul markets performed very strongly, increasing by 10.2% and 7.2% respectively.

Britain remains our biggest source market for overseas tourists, representing 42% of all such visits. The next biggest source market is Mainland Europe, which accounts for 35% of international volume. Some 16% of overseas tourists come from North America. The balance, 7%, comes from other long haul markets.

### ***Economic benefits***

In 2014, out-of-state tourist expenditure, including spending by visitors from Northern Ireland, amounted to €4 billion. With a further €1.1 billion spent by overseas visitors on fares to Irish carriers, total foreign exchange earnings were €5.1 billion. Domestic tourism expenditure amounted to €1.5 billion, making tourism a €6.6 billion industry.

Government earned estimated revenue of €1.6 billion through taxation of tourism, of which €1.2 billion came from foreign tourism. In 2014 the tourism industry accounted for 3.9% of all tax revenue.

In 2014 the value of exported goods and services was estimated at €207.8 billion of which €5.1 billion can be directly attributed to tourism, accounting for 2.5% 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 €6.6 billion in 2014 represented 4.2% 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 139,800 in 2014 (7.3% 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 2009 – 2014

## Where did Ireland's tourists come from?

Numbers (000s)	2009 <sup>1</sup>	2010 <sup>2</sup>	2011 <sup>3</sup>	2012	2013	2014
<b>Britain</b>	<b>3,034</b>	<b>2,759</b>	<b>2,799</b>	<b>2,722</b>	<b>2,870</b>	<b>3,007</b>
<b>Mainland Europe</b>	<b>2,323</b>	<b>2,011</b>	<b>2,184</b>	<b>2,247</b>	<b>2,346</b>	<b>2,490</b>
France	393	344	381	384	409	420
Germany	411	381	411	437	466	535
Italy	274	214	214	240	226	246
Spain	255	214	233	239	249	274
Netherlands	n/a	120	133	137	148	151
Belgium	n/a	65	83	82	95	99
Denmark	n/a	43	46	42	51	55
Sweden	n/a	53	57	70	72	60
Switzerland	n/a	54	68	78	73	84
Austria	n/a	41	44	46	51	57
Norway	n/a	45	51	48	50	50
Poland	n/a	166	161	159	152	140
All Other Europe	n/a	270	302	284	306	318
<b>North America</b>	<b>920</b>	<b>864</b>	<b>904</b>	<b>940</b>	<b>1,039</b>	<b>1,146</b>
USA	835	780	811	833	924	1,005
Canada	85	83	93	107	115	140
<b>Rest of World</b>	<b>301</b>	<b>311</b>	<b>353</b>	<b>378</b>	<b>431</b>	<b>462</b>
Australia, New Zealand & Other Oceania	130	135	143	158	192	191
Other Areas	171	176	209	219	240	271
<b>Total Overseas</b>	<b>6,578</b>	<b>5,945</b>	<b>6,240</b>	<b>6,286</b>	<b>6,686</b>	<b>7,105</b>
Northern Ireland <sup>4</sup>	n/a	n/a	1,420	1,299	1,572	1,708
<b>Total out-of-state</b>	<b>n/a</b>	<b>n/a</b>	<b>7,660</b>	<b>7,585</b>	<b>8,258</b>	<b>8,813</b>
Domestic trips <sup>5</sup>	8,340	7,300	7,169	7,031	7,111	7,354

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 March 2012

2 Revised February 2014

3 Revised by CSO in 2013

4 Revised by NISRA May 2015

5 2010 and 2011 revised by CSO in 2013

# Tourism Revenue 2009 – 2014

*How much money did they spend?*

Revenue (€m)	2009 <sup>6</sup>	2010	2011 <sup>7</sup>	2012	2013 <sup>8</sup>	2014
<b>Britain</b>	<b>1,035.8</b>	<b>879.4</b>	<b>858.3</b>	<b>857.9</b>	<b>890.9</b>	<b>926.7</b>
<b>Mainland Europe</b>	<b>1,348.0</b>	<b>1,133.9</b>	<b>1,110.8</b>	<b>1,060.5</b>	<b>1,228.2</b>	<b>1,301.2</b>
<b>North America</b>	<b>724.6</b>	<b>695.1</b>	<b>677.4</b>	<b>745.7</b>	<b>829.0</b>	<b>940.3</b>
<b>Other Overseas</b>	<b>311.3</b>	<b>290.4</b>	<b>272.8</b>	<b>291.6</b>	<b>367.7</b>	<b>428.1</b>
<b>TOTAL OVERSEAS</b>	<b>3,419.7</b>	<b>2,998.8</b>	<b>2,919.4</b>	<b>2,955.8</b>	<b>3,315.7</b>	<b>3,596.4</b>
Northern Ireland <sup>9, 10</sup>	n/a	n/a	296.7	292.3	304.5	334.4
<b>TOTAL OUT-OF-STATE</b>	<b>n/a</b>	<b>n/a</b>	<b>3,216.1</b>	<b>3,248.1</b>	<b>3,620.3</b>	<b>3,930.7</b>
Carrier receipts <sup>11</sup>	524.0	580.0	626.0	856.0	977.0	1,130.0
Overseas same-day visits	27.0	25.0	36.0	34.0	35.0	41.0
<b>TOTAL FOREIGN EXCHANGE EARNINGS<sup>12</sup></b>	<b>n/a</b>	<b>n/a</b>	<b>3,878.1</b>	<b>4,138.1</b>	<b>4,632.3</b>	<b>5,101.7</b>
Domestic trips <sup>13</sup>	1,389.8	1,560.5	1,415.9	1,345.4	1,373.3	1,464.0
<b>TOTAL TOURISM REVENUE</b>	<b>5,360.5</b>	<b>5,164.3</b>	<b>5,294.0</b>	<b>5,483.5</b>	<b>6,005.6</b>	<b>6,565.7</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 visitors	€64
Overseas holidaymakers	€83
Domestic overnight trips	€69
Domestic day trips <sup>14</sup>	€40

**For every euro spent on tourism (domestic and overseas), 24.5c is generated in tax.**

## Employment – some useful figures

Every €1mn of tourist expenditure helps to support 34 tourism jobs.

Every 55 international tourists help support one tourism job.

1,000 additional tourists support 18 jobs in the tourism industry.

<sup>6</sup> Revised March 2012

<sup>7</sup> Revised by CSO in 2013

<sup>8</sup> Revised March 2014

<sup>9</sup> NISRA GBP: Northern Ireland resident expenditure data provided in STÉ from 2009 onwards. Euro exchange rate 2014-0.80612 Source: Central Bank of Ireland

<sup>10</sup> 2011, 2012, 2013 Revised by NISRA May 2015

<sup>11</sup> 2012 carrier receipts revised March 2014 2013 revised March 2015

<sup>12</sup> Foreign exchange earnings in 2009 and 2010 exclude revenue from Northern Ireland visitors

<sup>13</sup> 2010 and 2011 revised by CSO in 2013

<sup>14</sup> Based on 2009 data

## Regional Visits and Revenue 2014

Where did visitors go in 2014?

Numbers (000s) Revenue (€m)	Britain	Mainland Europe	North America	Other Areas	All Overseas	Northern Ireland <sup>15</sup>	Domestic Trips
Dublin	1,217 249.0	1,730 572.4	836 300.7	336 256.4	4,119 1,378.5	448 96.4	1,357 245.0
East & Midlands	361 113.0	275 99.0	97 46.0	48 33.0	781 291.0	201 35.6	911 147.5
South-East	322 82.8	269 63.4	227 45.2	52 14.2	870 205.6	103 25.9	990 200.8
South-West	767 188.7	761 273.7	557 255.2	144 60.2	2,229 777.8	108 23.9	1,478 327.0
Shannon	366 103.1	313 87.6	341 116.4	57 19.1	1,077 326.2	79 20.4	686 134.5
West	335 105.8	605 149.6	391 144.8	111 34.2	1,442 434.4	96 19.9	1,294 292.0
North-West	268 84.2	189 55.6	109 32.0	36 11.0	602 182.8	673 112.2	638 117.2

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

## Overseas Tourists in 2014

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	30
Other food & drink	34	39	32	32	32
Sightseeing/entertainment	7	6	7	8	8
Internal transport	13	13	12	13	12
Shopping	14	12	14	13	16
Miscellaneous	2	2	2	2	2

When did they arrive?

Seasonality (%)	Total	Britain	Mainland Europe	North America	Rest of World
January-March	18	20	17	13	17
April	8	9	9	6	7
May	10	9	10	11	9
June	10	8	10	13	10
July	11	9	11	13	14
August	12	11	12	13	12
September	9	9	9	11	9
October-December	22	24	21	20	22

Source: Fáilte Ireland estimates based on CSO

**How did they arrive/depart?**

(%)	Total	Britain	Mainland Europe	North America	Rest of World
<b>Air</b>					
From Britain	39	72	5	22	59
From Mainland Europe	35	1	85	16	28
Transatlantic	11	1	1	57	2
<b>Sea</b>					
From Britain	10	19	4	3	7
From Mainland Europe	1	-	3	-	-
<b>Via N. Ireland</b>	4	7	1	2	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	18	27	12	24	12
Guesthouses/B&Bs	6	4	5	8	5
Self-catering	28	9	30	33	44
Caravan & camping	1	1	1	*	*
Hostels	3	1	4	5	4
Friends/relatives	25	48	19	18	25
Other	19	10	29	12	10

Source: SOT

Nights (Million)	56.2	15.5	24.1	10.0	6.7
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Source (CSO)  
(\* indicates less than 0.5 percent)

**What activities did they engage in?**

	Overseas Participants (000s)
Hiking/cross country walking	1,193
Cycling	286
Golf	172
Angling	157
Equestrian	79

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

(000s)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	3,393	1,057	1,314	803	219
Visit friends/relatives	2,288	1,368	569	198	153
Business	1,108	536	412	99	60
Other	316	48	195	45	28

Source: CSO and NISRA

In 2014, less than 3 in ten (28%) of those coming to Ireland to visit friends/relatives were born in Ireland.

# Overseas Holidaymakers 2014

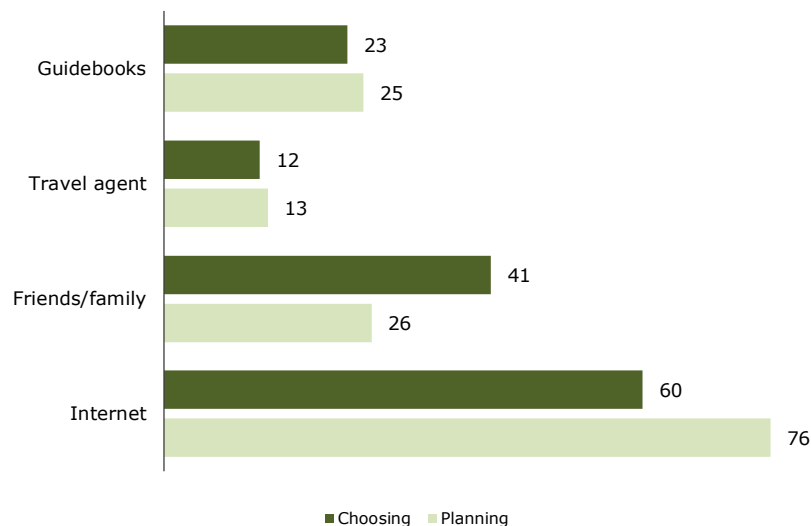
Holidaymakers in this section are defined as visitors who stated that their primary purpose for visiting Ireland was a holiday.

## What was the total number of holidaymakers in 2014?

Holidaymakers (000s)	2009	2010	2011	2012	2013	2014
Britain	953	896	961	941	979	1,057
Mainland Europe	1,090	971	1,041	1,120	1,227	1,314
North America	567	546	591	634	718	803
Rest of World	158	137	167	184	220	219
Total	2,769	2,549	2,760	2,879	3,144	3,393

Source: CSO and NISRA

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



Source: Fáilte Ireland's Post Survey of Holidaymakers 2014

## How did they arrange their holiday?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Package*	21	12	17	31	21
Independent	79	88	83	69	79

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

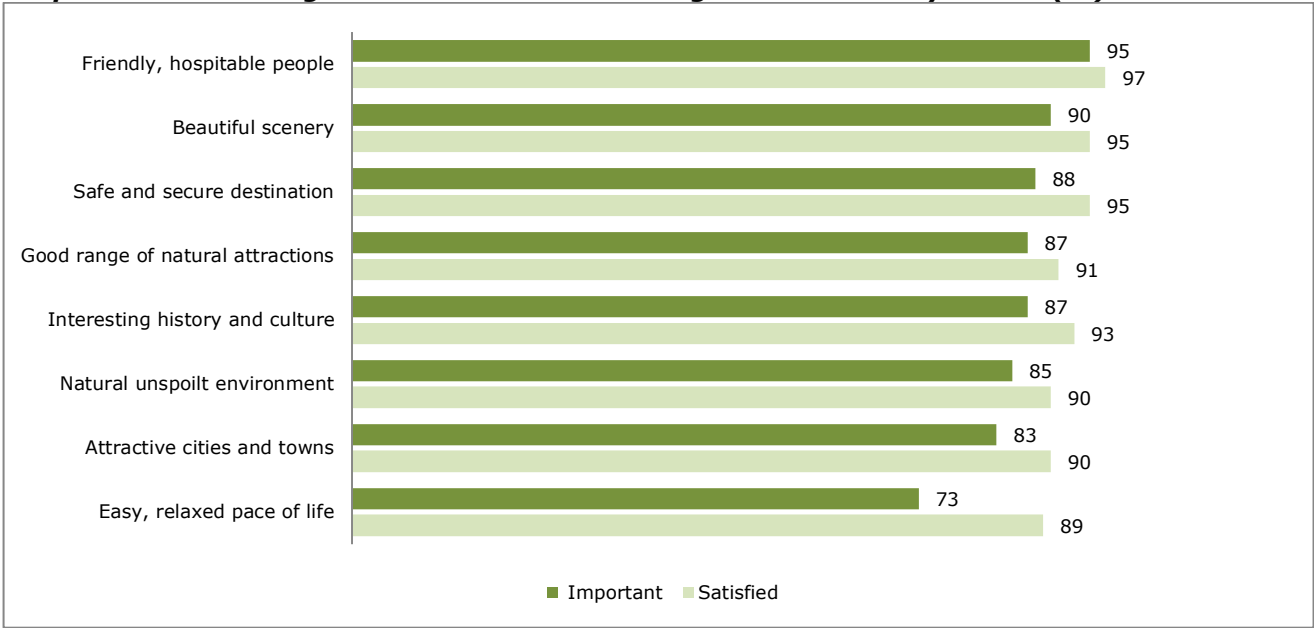
Source: Fáilte Ireland's Survey of Overseas Travellers

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

Experience of Ireland	Use of car	Age	Social class	Party composition	
First visit	63	Car brought 13	Under 25 years 20	Managerial/professional (AB) 30	Alone 21
Repeat	35	Car hired 32	25-34 years 20	White collar (C1) 53	Couple 43
Irish-born	2	Car not used 55	35-44 years 11	Skilled worker (C2) 15	Family 17
			45+ years 48	Unskilled worker (DE) 3	Other adult group 19

Source: Fáilte Ireland's Survey of Overseas Travellers

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



Source: Fáilte Ireland's Post Survey of Overseas Holidaymakers 2014



## What are Holidaymaker Segments ?

Part of Fáilte Ireland's development agenda is aimed at specific target segments, which have been identified as Ireland's best prospects for growing tourism in its main overseas markets. The three priority segments are described below.

### Social Energisers



Travellers with a passion for new "wow" experiences, who are seeking fun and excitement, immersing themselves in the destination

Independent thinkers with a craving for culture and history. They are out to broaden their minds and expand their experiences by exploring new landscapes, history and culture

### Culturally Curious



Adventurous and committed to spending quality time in a breath-taking place. They are on holiday to take time out, get physical with nature and reconnect with their partner.

### Great Escapers



## Which segments came to Ireland in 2014?

% of overseas holidaymakers by market



■ Social Energisers

■ Culturally Curious

■ Great Escapers

# Domestic Tourism in 2014<sup>16</sup>

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

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

Source: CSO Household Travel Surveys 2010-2014

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

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

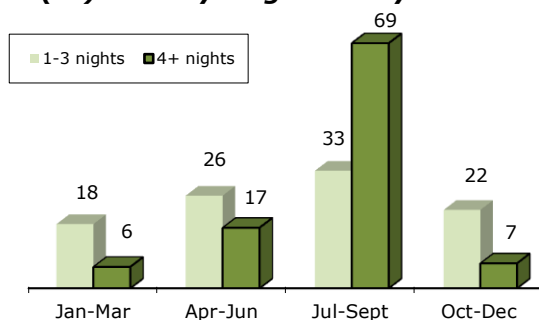
Source: CSO Household Travel Surveys 2010-2014

## Accommodation bednights domestic holidaymakers (%)

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

Source: CSO Household Travel Surveys 2010-2014

## Seasonality of holidaymakers (%) 2014 by length of stay



Source: CSO Household Travel Survey 2014

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

Hiking/walking	22
Houses/castles	20
Visits to spas	19
National parks	18
Watersports (excluding swimming)	18
Gardens	16
Heritage/ interpretive centres	15
Museums/art galleries	11
Cycling	8
Golf	6
Angling	2
Attending horse racing	2
Equestrian pursuits	2

Source: Fáilte Ireland Domestic Omnibus 2014

## **The Tourism Product**

### **Accommodation in 2014**

	<b>Premises</b>	<b>Rooms</b>
Hotels	811	56,736
Guesthouses	235	2,924
Bed and Breakfast*	1,394	5,859
Self-Catering (group scheme only - units)	2,968	n/a
Hostels (beds)	114	8,214
Caravan & camping (pitches)	92	5,252

Source: SouthWestern Tourism Services

\* includes specialist and pub accommodation

### **Accommodation occupancy in 2014**

	<b>%</b>
Hotel Room Occupancy	64
Guesthouse Room Occupancy	60
B&Bs Room Occupancy	40
Hostels Bed Occupancy	57
Group Scheme Self-Catering Unit Occupancy	45

Source: Fáilte Ireland Occupancy Surveys

## Attendance at popular visitor attractions in Ireland 2014

Top Fee-Charging Attractions			Top Free Attractions		
Name of Attraction	County	2014	Name of Attractions	County	2014
Guinness Storehouse	Dublin	1,269,371	The National Gallery of Ireland	Dublin	593,183
Cliffs of Moher Visitor Experience	Clare	1,080,501	National Botanic Gardens	Dublin	541,946
Dublin Zoo	Dublin	1,076,876	Doneraile Wildlife Park	Cork	460,000
National Aquatic Centre	Dublin	931,074	National Museum of Ireland - Archaeology, Kildare St	Dublin	447,137
Book of Kells	Dublin	650,476	Science Gallery at Trinity College Dublin	Dublin	406,982
St Patrick's Cathedral	Dublin	457,277	Farmleigh	Dublin	402,773
Tayto Park	Meath	450,000	Newbridge Silverware	Kildare	350,000
Fota Wildlife Park	Cork	438,000	Irish Museum of Modern Art	Dublin	306,662
Blarney Castle	Cork	390,000	Chester Beatty Library	Dublin	304,000
Rock of Cashel	Tipperary	372,503	National Museum of Ireland - Natural History, Merrion St	Dublin	300,272
No. 29 – Georgian House Museum	Dublin	370,000	The National Library of Ireland	Dublin	270,394
Kilmainham Gaol	Dublin	328,886	National Museum of Ireland - Decorative Arts & History, Collins Barracks	Dublin	243,172
Bunratty Castle & Folk Park	Clare	294,339	Holy Cross Abbey	Tipperary	200,000
Castletown House & Parklands	Kildare	285,410	Connemara National Park	Galway	169,960
Old Jameson Distillery	Dublin	270,038	Dublin City Gallery – The Hugh Lane	Dublin	160,000
Kilkenny Castle	Kilkenny	259,250	Galway City Museum	Galway	153,000
Powerscourt House & Gardens	Wicklow	232,605	Nicholas Mosse Pottery	Kilkenny	120,000
Dublin Castle	Dublin	217,758	Sliabh Liag Cliffs	Donegal	120,000
Christ Church Cathedral	Dublin	173,265	National Museum of Ireland - Country Life, Turlough Park	Mayo	109,000
Glenveagh National Park, Castle & Gardens	Donegal	150,691	Malin Head Viewing Point	Donegal	105,000
Clonmacnoise	Offaly	149,472	The Model	Sligo	104,000

Source: Fáilte Ireland Visitor Attraction Survey 2014