

# TOURISM FACTS 2016

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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 Capita (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 2016

Expenditure by tourists visiting Ireland (including receipts paid to Irish carriers by foreign visitors) was estimated to be worth €6.6 billion in 2016, this represents growth of 9.5% on 2015. Combining spending by international tourists with the money spent by Irish residents taking trips here, total tourism expenditure in 2016 was estimated to be €8.3 billion.

Overseas tourist visits to Ireland in 2016 grew by 8.8% to 8.742 million. Short haul markets, Britain and Mainland Europe recorded respective growth of 8.5% and 7.7%. North America also performed very strongly, increasing by 14.2%.

Britain remains our biggest source market for overseas tourists, representing 41.5% of all such visits. The next biggest source market is Mainland Europe, which accounts for 35.6% of international volume. Some 16.9% of overseas tourists come from North America. The balance, 6.1%, comes from other long haul markets.

### ***Economic benefits***

In 2016, out-of-state tourist expenditure amounted to €5.1 billion. With a further €1.5 billion spent by overseas visitors on fares to Irish carriers, foreign exchange earnings were €6.6 billion. Domestic tourism expenditure amounted to €1.8 billion, making tourism a €8.4 billion industry.

Government earned estimated revenue of €1.9 billion through taxation of tourism, of which €1.5 billion came from foreign tourism. In 2016 the tourism industry accounted for 4.0% of all tax revenue.

In 2016 the value of exported goods and services was estimated at €317.2 billion of which €6.6 billion can be directly attributed to tourism, accounting for 2.1% 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 €8.4 billion in 2016 represented 4.4% of modified GNI<sup>1</sup> 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 149,500 in 2016 (7.4% 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 225,000. This estimate includes an additional category of tourism services and attractions which is not covered by the CSO.

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<sup>1</sup> Modified gross national income (or GNI\*) is defined as GNI less the effects of the profits of re-domiciled companies and the depreciation of intellectual property products and aircraft leasing companies. GNI\* is designed as a supplementary indicator of the level of the Irish economy for use in ratio analysis as an alternative to GDP.

# Tourism Numbers 2013 – 2016

## Where did Ireland's tourists come from?

Numbers (000s)	2013	2014	2015	2016
<b>Britain</b>	<b>2,870</b>	<b>3,007</b>	<b>3,346</b>	<b>3,632</b>
<b>Mainland Europe</b>	<b>2,346</b>	<b>2,490</b>	<b>2,880</b>	<b>3,102</b>
France	409	420	471	494
Germany	466	535	609	624
Italy	226	246	304	326
Spain	249	274	322	370
Netherlands	148	151	174	222
Belgium	95	99	121	127
Denmark	51	55	66	64
Sweden	72	60	64	59
Switzerland	73	84	105	107
Austria	51	57	53	58
Norway	50	50	58	50
Poland	152	140	161	176
All Other Europe	306	318	373	427
<b>North America</b>	<b>1,039</b>	<b>1,146</b>	<b>1,294</b>	<b>1,477</b>
USA	924	1,005	1,129	1,294
Canada	115	140	165	183
<b>Rest of World</b>	<b>431</b>	<b>462</b>	<b>516</b>	<b>531</b>
Australia, New Zealand & Other Oceania	192	191	204	206
Other Areas	240	271	312	325
<b>Total Overseas</b>	<b>6,686</b>	<b>7,105</b>	<b>8,036</b>	<b>8,742</b>
Northern Ireland <sup>2</sup>	1,572	1,708	1,492	1,358
<b>Total out-of-state</b>	<b>8,258</b>	<b>8,813</b>	<b>9,528</b>	<b>10,100</b>
Domestic trips <sup>3</sup>	8,413	8,991	9,125	9,282

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>2</sup> Revised by NISRA May 2015

<sup>3</sup> 2012-2015 domestic data revised due to new methodological approach by CSO, August 2016

# Tourism Revenue 2013 – 2016

*How much money did they spend?*

Revenue (€m)	2013 <sup>4</sup>	2014	2015	2016
<b>Britain</b>	<b>890.9</b>	<b>926.7</b>	<b>1,017.9</b>	<b>1,109.8</b>
<b>Mainland Europe</b>	<b>1,228.2</b>	<b>1,301.2</b>	<b>1,555.3</b>	<b>1,657.5</b>
<b>North America</b>	<b>829.0</b>	<b>940.3</b>	<b>1,199.7</b>	<b>1,337.4</b>
<b>Other Overseas</b>	<b>367.7</b>	<b>428.1</b>	<b>492.6</b>	<b>533.3</b>
<b>TOTAL OVERSEAS</b>	<b>3,315.7</b>	<b>3,596.4</b>	<b>4,265.3</b>	<b>4,638.0</b>
Northern Ireland <sup>5, 6</sup>	304.5	334.4	338.2	366.9
<b>TOTAL OUT-OF-STATE</b>	<b>3,620.3</b>	<b>3,930.7</b>	<b>4,603.5</b>	<b>5,086.0</b>
Carrier receipts <sup>7</sup>	976.0	1,166.0	1,322.0	1,479.0
Overseas same-day visits	35.0	41.0	38.0	48.0
<b>TOTAL FOREIGN EXCHANGE EARNINGS</b>	<b>4,631.3</b>	<b>5,137.7</b>	<b>5,963.5</b>	<b>6,613.0</b>
Domestic trips <sup>8</sup>	1,533.0	1,713.5	1,725.3	1,776.1
<b>TOTAL TOURISM REVENUE</b>	<b>6,164.3</b>	<b>6,851.2</b>	<b>7,688.8</b>	<b>8,389.1</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	€71

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 27 tourism jobs.  
1,000 additional overseas tourists support 19 jobs in the tourism industry.

<sup>4</sup> Revised March 2014

<sup>5</sup> NISRA GBP: Northern Ireland resident expenditure data provided in STÉ. 2016 Euro exchange rate 0.81948 Source: Central Bank of Ireland

<sup>6</sup> 2013 Revised by NISRA May 2015, 2015 revised 2016

<sup>7</sup> 2013 and 2014 revised March 2016

<sup>8</sup> 2012-2015 domestic data revised due to new methodological approach by CSO, August 2016

## Regional Performance 2016

Where did tourists go in 2016? (EUROSTAT NUTS 3 REGIONS, see pg 12)

Numbers (000s) Revenue (€m)	Britain	Mainland Europe	North America	Other Areas	All Overseas	Northern Ireland	Domestic Trips
Dublin	1,893	2,231	1,169	394	5,687	310	1,406
	368	764	496	347	1,975	106	272
Mid East <sup>9</sup>	241	234	108	42	626	37	704
	68	99	65	18	251	14	123
Midlands <sup>10</sup>	128	64	28	6	226	18	401
	31	25	13	2	72	6	66
South East	358	290	227	71	946	67	1,355
	112	73	56	32	273	25	233
South West	593	772	591	122	2,079	84	2,006
	200	280	317	52	849	38	401
Mid West	377	401	357	80	1,215	9	817
	102	133	120	36	390	2	170
West	350	733	479	114	1,675	155	1,591
	110	191	210	33	543	54	329
Border	360	263	144	47	815	679	1,001
	120	92	60	13	286	123	183

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

## Overseas Tourists in 2016

### 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	33	29	34	34	33
Other food & drink	34	40	33	32	32
Sightseeing/entertainment	6	5	7	6	7
Internal transport	12	12	12	13	11
Shopping	12	11	12	13	14
Miscellaneous	2	2	2	2	3

<sup>9</sup> Caution - small sample sizes in individual market areas

<sup>10</sup> Caution - small sample sizes in individual market areas

### When did they arrive? <sup>11</sup>

Seasonality (%)	Total	Britain	Mainland Europe	North America	Rest of World
January-March	19	22	18	13	17
April	8	9	9	6	6
May	9	8	10	10	8
June	10	8	10	12	10
July	11	9	12	13	12
August	12	11	12	12	12
September	9	9	9	11	10
October-December	22	23	21	23	23

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	38	75	5	21	32
From Mainland Europe	38	1	88	22	30
Transatlantic	10	1	1	53	2
Asia/Middle East	2	-	-	-	28
<b>Sea</b>					
From Britain	8	16	3	2	5
From Mainland Europe	1	-	2	-	-
<b>Via N. Ireland</b>	3	6	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	22	13	31	11
Guesthouses/B&Bs	7	6	9	10	3
Self-catering	25	11	27	20	45
Caravan & camping	1	1	1	*	*
Hostels	3	1	5	4	2
Friends/relatives	25	49	19	21	19
Other	21	10	26	14	20
Nights (Million)	67.9	17.7	28.9	13.2	8.1

Source: SOT

Source (CSO)

(\* indicates less than 0.5 percent)

### What activities did they engage in?

	Overseas Participants (000s)
Hiking/cross country walking	2,077
Cycling	399
Golf	193
Angling	131
Equestrian	98

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

(000s)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	4,406	1,423	1,699	1,041	242
Visit friends/relatives	2,613	1,518	684	233	178
Business	1,338	633	487	139	79
Other	385	58	232	64	32

Source: CSO and NISRA

<sup>11</sup> Easter weekend fell in March 2016

In 2016, just under on third (31%) of those coming to Ireland to visit friends/relatives were born in Ireland.

## Overseas Holidaymakers 2016

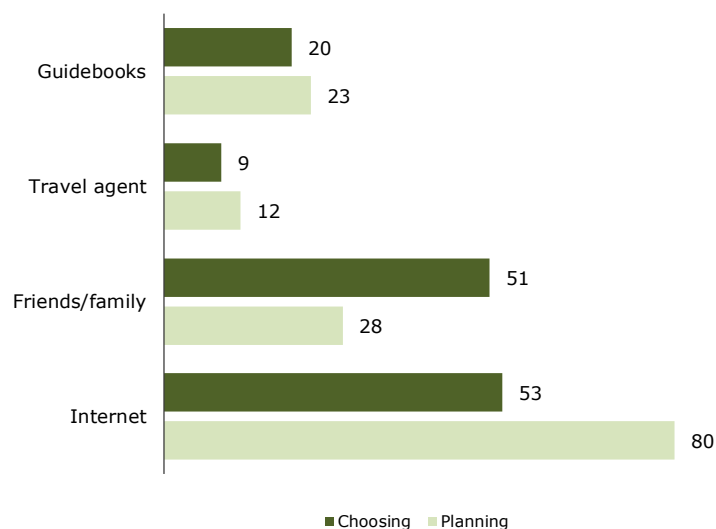
Holidaymakers in this section are defined as tourists who stated that their primary purpose for visiting Ireland was a holiday.

### What was the total number of holidaymakers in 2016?

Holidaymakers (000s)	2011	2012	2013	2014	2015	2016
Britain	961	941	979	1,057	1,254	1,423
Mainland Europe	1,041	1,120	1,227	1,314	1,612	1,699
North America	591	634	718	803	926	1,041
Rest of World	167	184	220	219	243	242
Total	2,760	2,879	3,144	3,393	4,036	4,406

Source: CSO and NISRA

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



Source: Fáilte Ireland's Post Survey of Holidaymakers 2016

### How did they arrange their holiday?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Package*	17	6	15	28	16
Independent	83	94	85	72	84

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

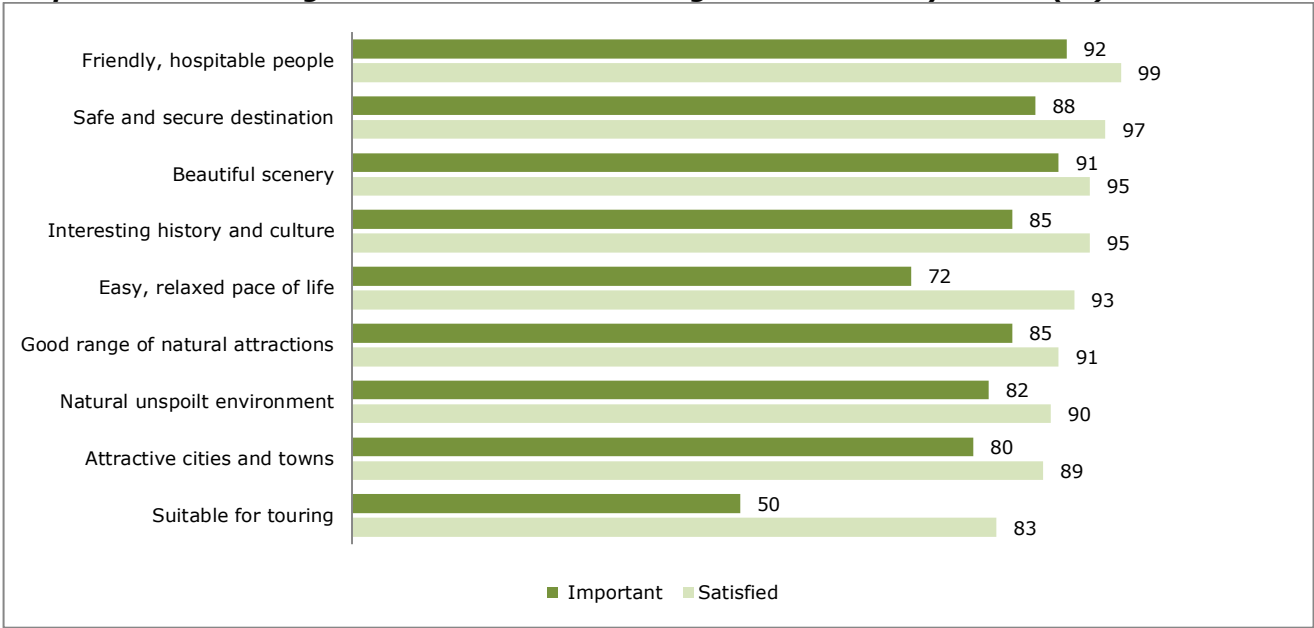
Source: Fáilte Ireland's Survey of Overseas Travellers

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

Experience of Ireland	Use of car	Age	Social class	Party composition					
First visit	64	Car brought	11	Under 25 years	22	Managerial/professional (AB)	30	Alone	19
Repeat	36	Car hired	31	25-34 years	24	White collar (C1)	57	Couple	42
Irish-born	1	Car not used	58	35-44 years	13	Skilled worker (C2)	10	Family	15
				45+ years	40	Unskilled worker (DE)	3	Other adult group	23

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 2016



# Domestic Tourism in 2016<sup>12</sup>

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

	2013	2014	2015	2016
Holiday trips	4,073	4,436	4,658	4,830
- Long (4+ nights)	1,088	1,144	1,078	1,144
- Short (1-3 nights)	2,985	3,292	3,580	3,686
Visiting friends/relatives trips	2,988	2,918	2,921	3,032
Business trips	364	453	407	425
Other trips	988	1,184	1,138	994
<b>Total trips</b>	<b>8,413</b>	<b>8,991</b>	<b>9,125</b>	<b>9,282</b>

Source: CSO Household Travel Surveys 2013-2016

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

	2013	2014	2015	2016
Holiday trips	947.2	992.8	1,070.4	1,123.9
- Long (4+ nights)	395.2	385.6	394.2	418.4
- Short (1-3 nights)	552.0	607.1	676.2	705.5
Visiting friends/relatives trips	284.8	327.0	296.5	294.5
Business trips	84.2	110.3	98.0	104.7
Other trips	216.8	283.4	260.4	253.0
<b>Total expenditure</b>	<b>1,533</b>	<b>1,713.5</b>	<b>1,725.3</b>	<b>1,776.1</b>

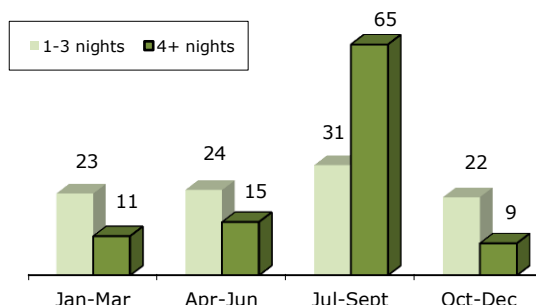
Source: CSO Household Travel Surveys 2013-2016

## Accommodation bednights domestic holidaymakers (%)

	2013	2014	2015	2016
Hotels	34	34	35	36
Guesthouse/B&Bs	3	4	4	4
Caravan/camping	15	14	7	13
Self-catering	22	23	22	20
Holiday home	15	12	19	13
Friends/relatives	10	13	10	13
Other	1	1	3	2

Source: CSO Household Travel Surveys 2013-2016

## Seasonality of holidaymakers (%) 2016 by length of stay



Source: CSO Household Travel Survey 2016

<sup>12</sup> 2012-2015 domestic data revised due to new methodological approach by CSO, August 2016

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

Hiking/walking	25
Houses/castles	24
National parks	23
Visits to spas	20
Heritage/ interpretive centres	20
Gardens	19
Watersports (excluding swimming)	19
Monuments	18
Museums/art galleries	14
Cycling	8
Golf	6
Angling	3
Attending horse racing	3

Source: Fáilte Ireland Domestic Omnibus 2016

## **The Tourism Product**

### **Accommodation in 2016**

	<b>Premises</b>	<b>Rooms</b>
Hotels	798	56,757
Guesthouses	203	2,584
Bed and Breakfasts	1,257	5,078
	<b>Premises</b>	<b>Beds</b>
Self-Catering (units)	3,143	16,694
Hostels	92	7,503
Welcome Standard	177	6,656
Caravan & camping (pitches)	92	5,333

Source: Capita

### **Accommodation occupancy in 2016**

	<b>%</b>
Hotel Room Occupancy	72
Guesthouse Room Occupancy	66
B&Bs Room Occupancy	49
Hostels Bed Occupancy	66
Self-Catering Bed Occupancy	39
Caravan and Camping Bed Occupancy	24

Source: Fáilte Ireland Accommodation Survey

## Attendance at popular visitor attractions in Ireland 2016

Top Fee-Charging Attractions			Top Free Attractions		
Name of Attraction	County	2016	Name of Attractions	County	2016
Guinness Storehouse	Dublin	1,647,408	The National Gallery of Ireland	Dublin	755,577
Cliffs of Moher Visitor Experience	Clare	1,427,166	Irish Museum of Modern Art	Dublin	584,856
Dublin Zoo	Dublin	1,143,908	National Botanic Gardens	Dublin	583,539
National Aquatic Centre	Dublin	1,037,992	Doneraile Wildlife Park	Cork	480,000
Book of Kells	Dublin	890,781	National Museum of Ireland - Archaeology, Kildare St	Dublin	479,261
Tayto Park	Meath	762,000	Science Gallery at Trinity College Dublin	Dublin	413,900
St Patrick's Cathedral	Dublin	563,000	National Museum of Ireland - Decorative Arts & History, Collins Barracks	Dublin	411,391
Castletown House & Parklands	Kildare	547,324	Farmleigh	Dublin	383,335
Powerscourt Gardens & Waterfall	Wicklow	467,507	Chester Beatty Library	Dublin	371,211
Fota Wildlife Park	Cork	465,281	Newbridge Silverware Museum of Style Icons	Kildare	350,000
Kylemore Abbey & Garden	Galway	458,000	National Museum of Ireland - Natural History, Merrion St	Dublin	317,269
Blarney Castle	Cork	420,000	Croagh Patrick Visitor Centre	Mayo	220,000
Kilmainham Gaol	Dublin	390,970	Galway City Museum	Galway	213,390
Kilkenny Castle	Kilkenny	384,918	Connemara National Park	Galway	210,812
Bunratty Castle & Folk Park	Clare	352,286	Dublin City Gallery The Hugh Lane	Dublin	193,229
Rock of Cashel	Tipperary	338,830	Crawford Art Gallery	Cork	178,302
Emo Court House & Gardens	Laois	293,056	Sliabh Liag Cliffs	Donegal	177,333
Old Jameson Distillery	Dublin	269,000	Malin Head Viewing Point	Donegal	162,468
Dublin Castle	Dublin	253,786	Kilmacurragh Gardens	Wicklow	156,045
Christ Church Cathedral	Dublin	229,085	Nicholas Mosse Pottery	Kilkenny	142,000
Phoenix Park Visitor Centre	Dublin	206,326	National Museum of Ireland - Country Life, Turlough Park	Mayo	107,855

Source: Fáilte Ireland Visitor Attraction Survey 2016

## **NUTS 3 Region**

## **County**

### **Dublin**

Dublin City & County

### **South East**

Carlow  
Kilkenny  
Tipperary (South)  
Waterford  
Wexford

### **South West**

Cork  
Kerry

### **West**

Galway  
Mayo  
Roscommon

### **Mid East**

Kildare  
Meath  
Wicklow

### **Midland**

Laois  
Longford  
Offaly  
Westmeath

### **Mid West**

Clare  
Limerick  
Tipperary (North)

### **Border**

Cavan  
Donegal  
Leitrim  
Monaghan  
Sligo  
Louth