

Key Tourism Facts 2019



Fáilte Ireland
Research

March 2021

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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



In 2019 we welcomed **more holidaymakers from North America** than from Britain

APPROVED

54%

of overseas
tourists
come here
on holidays



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Expenditure by tourists visiting Ireland (excluding receipts paid to Irish carriers by foreign visitors) was estimated to be worth €5.6 billion in 2019. Combining spending by international tourists with the money spent by Irish residents taking trips here and receipts paid to Irish carriers by foreign visitors, total tourism expenditure in 2019 was estimated to be €9.5 billion.

Overseas tourists to Ireland in 2019 grew by 0.7% to 9.7 million. Overseas tourists from Britain grew by 0.2% while North America dipped slightly by -3.1%. This was offset by Mainland Europe recording growth of 2.8% and other long haul markets growing by 3.4% in 2019.

Mainland Europe accounts for 37.3% of our overseas tourists and is not our single largest source market, with Britain accounting for 36.0% of overseas tourists to Ireland. Some 19.7% come from North America and the balance of 7.0% come from other long haul markets. Revenue from Mainland Europe and North America equates to 35.8% and 33.0% of overseas tourism revenue respectively. British tourists account for 19.8% of overseas tourism spend in Ireland with 11.5% spent by other long haul tourists.

ECONOMIC BENEFITS

In 2019, out-of-state (Overseas and Northern Ireland) tourist expenditure amounted to €5.6 billion. With a further €1.8 billion spent by overseas visitors on fares to Irish carriers, foreign exchange earnings were €7.4 billion. Domestic tourism expenditure amounted to €2.1 billion, making tourism a €9.5 billion industry.

Before allowing for receipts paid to Irish air and sea carriers by overseas tourists, the government earned estimated revenue of €1.8 billion through taxation of tourism. This grows to €2.2 billion when carrier receipts are factored into the analysis, of which €1.7 billion came from out-of-state tourism and the balance from domestic tourism. In 2019 the tourism industry accounted for 3.7% of all tax revenue.

In 2019 the value of exported goods and services was estimated at €440 billion of which €7.4 billion can be directly attributed to tourism (i.e., foreign exchange earnings), accounting for 1.7% of export earnings. Being largely service based, tourism goods have low import content in comparison to other exports.

Total out-of-state expenditure, inclusive of carrier receipts and domestic tourism expenditure, comes to €9.5 billion, which represents 3.6% of GNP in revenue terms.

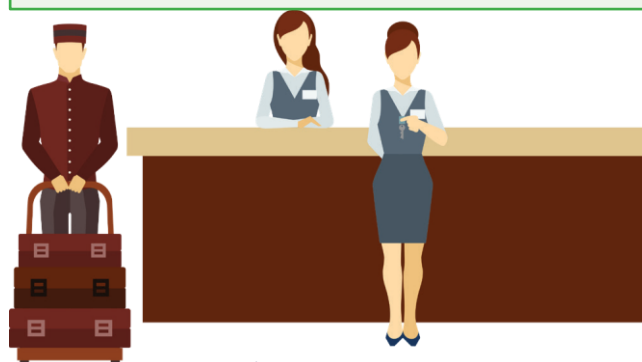
Because tourism is characterised by the fact that consumption takes place where the service is available and tourism activity is frequently concentrated in areas which lack an intensive industry base, it is credited with having a significant regional distributive effect.



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 177,700 in Q3 2019 (7.6% of total employment). This estimate of employment is based on the CSO's Household Survey and the jobs identified are defined as 'the respondent's main job' and include both full-time and part-time.

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 260,000. This estimate includes an additional category of tourism services and attractions which is not covered by the CSO.





Where did Ireland's tourists come from?



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Tourist Numbers (000s)	2015	2016	2017	2018	2019	Change 19 vs 18
Britain	3,346	3,632	3,445	3,480	3,487	0.2%
Mainland Europe	2,880	3,102	3,256	3,512	3,609	2.8%
France	471	494	512	525	534	1.7%
Germany	609	624	644	763	728	-4.6%
Italy	304	326	343	376	364	-3.2%
Spain	322	370	411	404	411	1.7%
Netherlands	174	222	230	229	235	2.7%
Belgium	121	127	123	128	122	-4.3%
Denmark	66	64	70	68	71	5.2%
Sweden	64	59	75	75	77	2.3%
Switzerland	105	107	104	111	120	8.2%
Austria	53	58	60	68	77	12.6%
Norway	58	50	54	53	48	-7.7%
Poland	161	176	171	188	214	14.2%
All Other Europe	373	427	458	524	606	15.7%
North America	1,294	1,477	1,715	1,963	1,902	-3.1%
USA	1,129	1,294	1,511	1,739	1,673	-3.8%
Canada	165	183	204	224	229	2.1%
Rest of World	516	531	607	654	676	3.4%
Australia, New Zealand & Other Oceania	204	206	208	226	225	-0.4%
Other Areas	312	325	399	427	450	5.4%
Total Overseas	8,036	8,742	9,023	9,609	9,674	0.7%
Northern Ireland	1,492	1,358	1,315	1,338	1,277	-4.6%
Total out-of-state	9,528	10,100	10,338	10,947	10,951	-
Domestic trips ^{1,2}	9,125	9,359	9,626	10,919	11,621	6.4%

Source: CSO/Fáilte Ireland/TSB, NISRA



1. 2015 domestic data revised due to new methodological approach by CSO, August 2016
2. 2016 domestic data revised by CSO, December 2017



Revenue (€m)	2015	2016	2017	2018	2019	Change 19 vs 18
Britain	1,017.9	1,109.8	1,046.5	1,024.8	1,022.1	-0.3%
Mainland Europe	1,555.3	1,657.5	1,763.0	1,845.8	1,853.6	0.4%
North America	1,199.7	1,337.4	1,525.5	1,746.7	1,705.7	-2.3%
Other Overseas	492.6	533.3	588.9	599.9	592.5	-1.2%
TOTAL OVERSEAS	4,265.3	4,638.0	4,923.9	5,217.3	5,174.0	-0.8%
Northern Ireland ³	338.2	366.9	371.3	394.6	402.0	1.9%
TOTAL OUT-OF-STATE	4,603.5	5,004.9	5,295.2	5,611.9	5,576.0	-0.6%
Carrier receipts ⁴	1,322.0	1,487.0	1,611.0	1,725.0	1,766.0	2.4%
Overseas same-day visits	38.0	48.0	53.0	47.0	44.0	-6.4%
TOTAL FOREIGN EXCHANGE EARNINGS	5,963.5	6,539.9	6,959.2	7,383.9	7,386.0	-
Domestic trips ^{5,6}	1,725.3	1,797.7	1,879.1	2,006.0	2,146.6	7.0%
TOTAL TOURISM REVENUE	7,688.8	8,337.6	8,838.3	9,389.9	9,532.6	1.5%
<i>TOURISM REVENUE EXCLUDING CARRIER RECEIPTS</i>	<i>6,366.8</i>	<i>6,850.6</i>	<i>7,227.3</i>	<i>7,664.9</i>	<i>7,766.6</i>	<i>1.3%</i>

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

Revenue - some useful figures

PER DIEMS spend per person per day 2019

Overseas tourists €72

Overseas holidaymakers €96

Domestic overnight trips €74

Some Useful Figures



Every **€1m** of tourist expenditure helps to support **27** tourism jobs.



1,000 additional overseas tourists support **20** jobs in the tourism industry.



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

3. 2015 Revised by NISRA 2016
 4. 2016 revised by CSO December 2018
 5. 2015 domestic data revised due to new methodological approach by CSO, August 2016
 6. 2016 domestic data revised by CSO, December 2017



Where did tourists go in 2019?

REGIONAL PERFORMANCE 2019



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Border		
Market	Numbers (000's)	Revenue (€m)
Britain	308	97
Mainland Europe	246	75
North America	149	64
Other Areas	65	22
All Overseas	768	259
Northern Ireland	597	152
Domestic	1,189	200

West		
Market	Numbers (000's)	Revenue (€m)
Britain	342	112
Mainland Europe	812	238
North America	647	264
Other Areas	142	39
All Overseas	1,943	653
Northern Ireland	113	48
Domestic	1,848	370

Mid West		
Market	Numbers (000's)	Revenue (€m)
Britain	378	107
Mainland Europe	456	122
North America	522	212
Other Areas	75	31
All Overseas	1,432	472
Northern Ireland	23	8
Domestic	1,197	217

South West		
Market	Numbers (000's)	Revenue (€m)
Britain	541	166
Mainland Europe	877	371
North America	751	335
Other Areas	166	98
All Overseas	2,335	970
Northern Ireland	38	25
Domestic	2,316	511

South East		
Market	Numbers (000's)	Revenue (€m)
Britain	274	75
Mainland Europe	320	100
North America	272	66
Other Areas	79	20
All Overseas	945	261
Northern Ireland	53	21
Domestic	1,795	312

Mid East / Midlands		
Market	Numbers (000's)	Revenue (€m)
Britain	411	117
Mainland Europe	335	136
North America	153	68
Other Areas	55	28
All Overseas	954	348
Northern Ireland	170	52
Domestic	1,513	240

Dublin		
Market	Numbers (000's)	Revenue (€m)
Britain	1,922	349
Mainland Europe	2,638	811
North America	1,554	696
Other Areas	531	355
All Overseas	6,644	2,210
Northern Ireland	283	95
Domestic	1,763	296

Source:
Overseas – Fáilte Ireland estimates based on Survey of Travellers,
Northern Ireland – NISRA,
Domestic – CSO Household Survey

NUTS 3 Region*	County	NUTS 3 Region	County	NUTS 3 Region	County
Dublin	Dublin	South East	Carlow Kilkenny Waterford Wexford	West	Galway Mayo Roscommon
Mid East/ Midlands	Kildare Louth Laois Longford Meath Offaly Westmeath Wicklow	South West	Cork Kerry	Border	Cavan Donegal Leitrim Monaghan Sligo
		Mid West	Clare Limerick Tipperary		

* As defined by Eurostat








Breakdown of spend in Ireland (%)



	Total	Britain	Mainland Europe	North America	Rest of World
Bed & Board	29%	28%	32%	28%	26%
Other food & drink	37%	42%	36%	36%	36%
Sightseeing/entertainment	6%	5%	6%	6%	7%
Internal transport	13%	13%	13%	15%	12%
Shopping	13%	11%	11%	14%	17%
Miscellaneous	1%	1%	1%	1%	2%






Source: Fáilte Ireland's Survey of Overseas Travellers

When did they arrive? (%)

 TOTAL		 Britain		 Mainland Europe		 North America		 Rest of World	
January-March	19%	January-March	21%	January-March	19%	January-March	15%	January-March	17%
April	9%	April	9%	April	9%	April	8%	April	7%
May	9%	May	9%	May	9%	May	11%	May	9%
June	10%	June	8%	June	10%	June	12%	June	11%
July	11%	July	9%	July	11%	July	12%	July	13%
August	11%	August	10%	August	11%	August	12%	August	12%
September	9%	September	8%	September	9%	September	10%	September	10%
October-December	22%	October-December	25%	October-December	22%	October-December	20%	October-December	22%

Source: Fáilte Ireland estimates based on CSO

How did they arrive/depart? (%)

 TOTALS		 Britain		 Mainland Europe		 North America		 Rest of World	
Air		Air		Air		Air		Air	
From Britain	34%	From Britain	75%	From Britain	5%	From Britain	18%	From Britain	31%
From Mainland Europe	42%	From Mainland Europe	2%	From Mainland Europe	88%	From Mainland Europe	27%	From Mainland Europe	31%
Transatlantic	11%	Transatlantic	2%	Transatlantic	2%	Transatlantic	51%	Transatlantic	2%
Asia/Middle East	2%	Asia/Middle East	*	Asia/Middle East	*	Asia/Middle East	*	Asia/Middle East	27%
Sea		Sea		Sea		Sea		Sea	
From Britain	7%	From Britain	15%	From Britain	2%	From Britain	2%	From Britain	5%
From Mainland Europe	1%	From Mainland Europe	*	From Mainland Europe	2%	From Mainland Europe	*	From Mainland Europe	*
Via Northern Ireland	3%	Via Northern Ireland	6%	Via Northern Ireland	1%	Via Northern Ireland	2%	Via Northern Ireland	4%

Source: CSO (* indicates less than 0.5 percent)



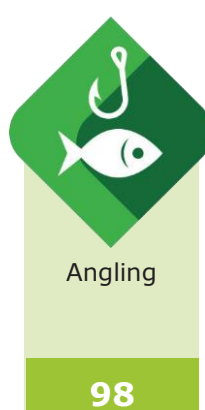
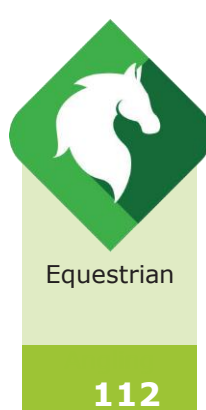
Where did they stay?



Accommodation	Nights %	Total	Britain	Mainland Europe	North America	Rest of World
Hotels		21%	23%	17%	38%	9%
Guesthouses/B&Bs		8%	6%	9%	13%	4%
Self-catering		21%	11%	19%	13%	46%
Caravan & camping		*	*	1%	*	-
Hostels		4%	2%	5%	3%	4%
Friends/relatives		25%	46%	21%	18%	20%
Other		21%	12%	28%	15%	17%
Source: Fáilte Ireland's Survey of Overseas Travellers						
Nights (Million) 2019		71.9	16.7	30.4	15.7	9.1
Source: CSO and NISRA						

(* indicates less than 0.5 percent)

What activities did they engage in? (000's)



Source: Fáilte Ireland estimates based on Survey of Overseas Travellers

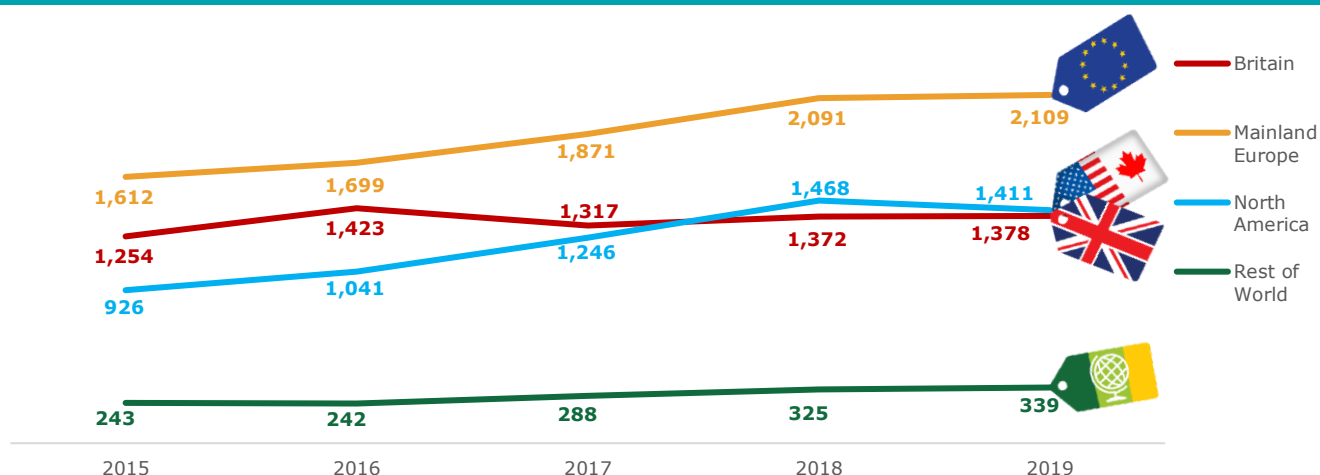
What was their main reason for visiting Ireland?

(000's)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	5,237	1,378	2,109	1,411	339
Visit Friends/Relatives	2,709	1,484	727	288	210
Business	1,317	577	532	115	92
Other	411	48	240	88	34

Source: CSO and NISRA



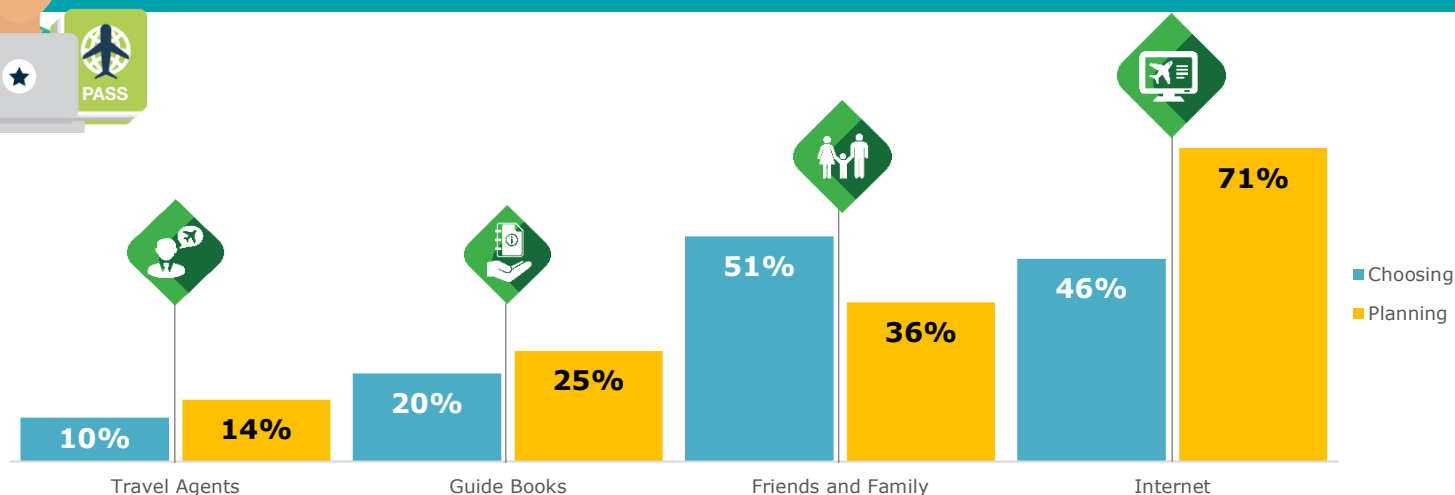
What was the total number of holidaymakers in 2019?



Source: CSO and NISRA

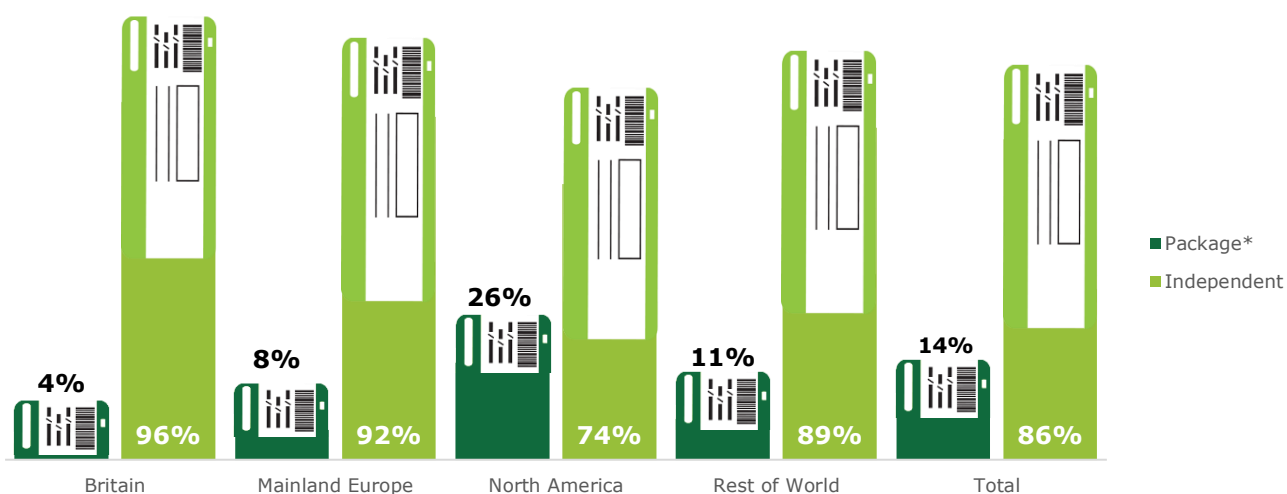


Sources of information for choosing/planning a holiday in Ireland (%)



Source: Fáilte Ireland's Tourism Experience Port Survey 2019

How did they arrange their holiday? (%)



* 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

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

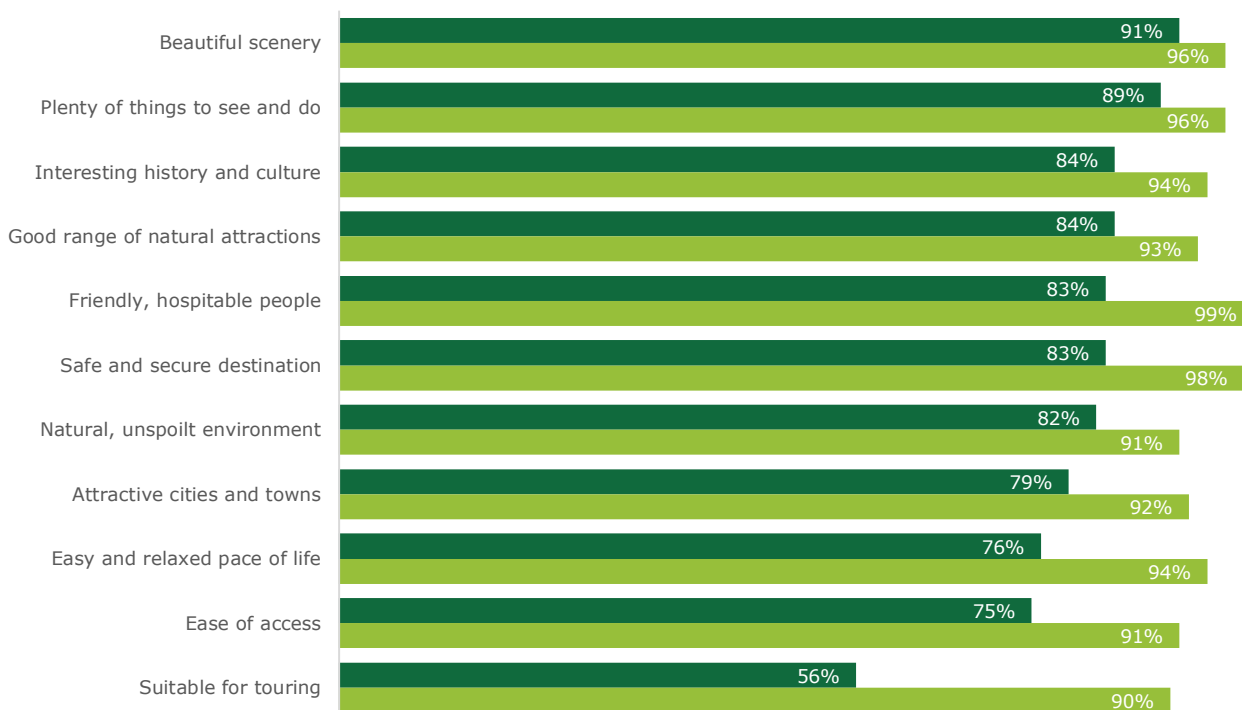


What were the characteristics of holidaymakers to Ireland? (%)

Experience of Ireland		Use of Car		Age		Social Class		Party Competition	
First Visit	69%	Car Brought	7%	Under 25 years	20%	Mgr/Prof (AB)	24%	Alone	21%
Repeat	30%	Car Hired	32%	25-34 years	26%	White Collar (C1)	65%	Couple	39%
Irish Born	1%	Car Not Used	61%	35-44 years	11%	Skilled Worker (C2)	8%	Family	19%
				45+ years	42%	Unskilled Worker (DE)	2%	Other Adult Group	20%

Source: Fáilte Ireland's Survey of Overseas Travellers

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







Source: Fáilte Ireland's Tourism Experience Port Survey 2019







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










Domestic trips (000s) by purpose of travel		2015	2016	2017	2018	2019
	Holiday trips	4,658	4,870	4,886	5,323	5,819
	- Long (4+ nights)	1,078	1,144	962	998	1,152
	- Short (1-3 nights)	3,580	3,726	3,924	4,326	4,666
	Visiting friends/relatives trips	2,921	3,045	3,096	3,759	3,847
	Business trips	407	431	426	473	551
	Other trips	1,138	1,014	1,218	1,364	1,404
TOTAL TRIPS		9,125	9,359	9,626	10,919	11,621

Source: CSO Household Travel Surveys 2015-2019

Domestic expenditure (€mn) by purpose of travel		2015	2016	2017	2018	2019
	Holiday trips	1,070.4	1,135.8	1,129.2	1,232.6	1,335.9
	- Long (4+ nights)	394.2	420.7	349.5	392.4	414.1
	- Short (1-3 nights)	676.2	715.0	779.7	840.2	921.8
	Visiting friends/relatives trips	296.5	297.0	353.1	352.9	371.8
	Business trips	98.0	106.3	123.3	116.9	124.9
	Other trips	260.4	258.6	273.4	303.6	314.1
TOTAL TRIPS		1,725.3	1,797.7	1,879.1	2,006.0	2,146.6

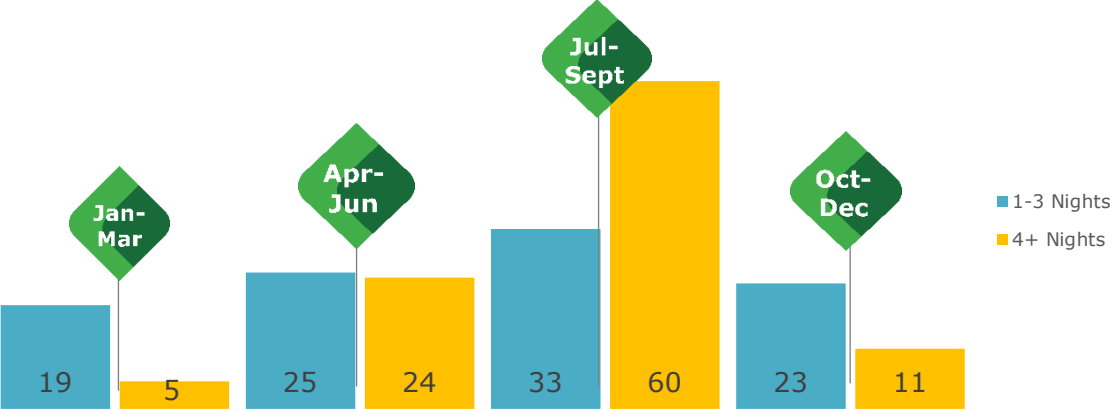
Source: CSO Household Travel Surveys 2015-2019

Accommodation bednights domestic holidaymakers (%)		2015	2016	2017	2018	2019
	Hotels	35	36	37	37	36
	Guesthouse/B&Bs	4	4	4	3	4
	Caravan/camping	7	13	14	10	11
	Self-catering	22	20	20	19	17
	Holiday home	19	13	11	21	16
	Friends/relatives	10	13	11	9	13
	Other	3	2	2	1	3

Source: CSO Household Travel Surveys 2015-2019



Seasonality of holidaymakers (%) 2019 by length of stay



Source: CSO Household Travel Survey 2019








Activities engaged in by domestic holidaymakers (%)



Source: Fáilte Ireland Domestic Tourism Tracker 2019 Qtr2 to Qtr4



Accommodation in 2019

Premises			Rooms	Room Occupancy %
	823	Hotels	60,152	73%
	155	Guesthouses	2,108	69%
	925	Bed and Breakfasts	3,923	44%
Premises/Units/Pitches			Beds	Bed Occupancy %
	301	Welcome Standard ⁹ (premises)	12,088	n/a
	86	Hostels (premises)	7,324	65%
	2,135	Self-Catering (units)	11,479	38%
	6,553	Caravan & camping (pitches)	30,317	31%

Source: Capita

Source: Fáilte Ireland Accommodation Survey

Attendance at popular visitor attractions in Ireland 2019

Top Fee-Charging Attractions

Name of Attraction	County	Visits
Guinness Storehouse	Dublin	1,700,000
Cliffs of Moher Visitor Experience	Clare	1,600,000
Dublin Zoo	Dublin	1,283,424
Book of Kells	Dublin	1,114,410
Tayto Park	Meath	720,000
St Patrick's Cathedral	Dublin	628,000
Kylemore Abbey & Gardens	Galway	560,000
Powerscourt House, Gardens & Waterfall	Wicklow	487,876
Fota Wildlife Park	Cork	462,047
Blarney Castle & Gardens	Cork	460,000

Top Free Attractions

Name of Attraction	County	Visits
Castletown House Parklands	Kildare	965,632
Kilkenny Castle Parklands	Kilkenny	905,642
National Gallery of Ireland	Dublin	761,469
Glendalough Monument & Site	Wicklow	732,362
National Botanic Gardens	Dublin	684,561
National Museum of Ireland - Archaeology	Dublin	505,420
Irish Museum of Modern Art	Dublin	503,904
Doneraile Park	Cork	490,000
Farmleigh House & Estate	Dublin	482,925
Battle of the Boyne/Oldbridge Estate	Meath	427,148

