

Travel Profiles

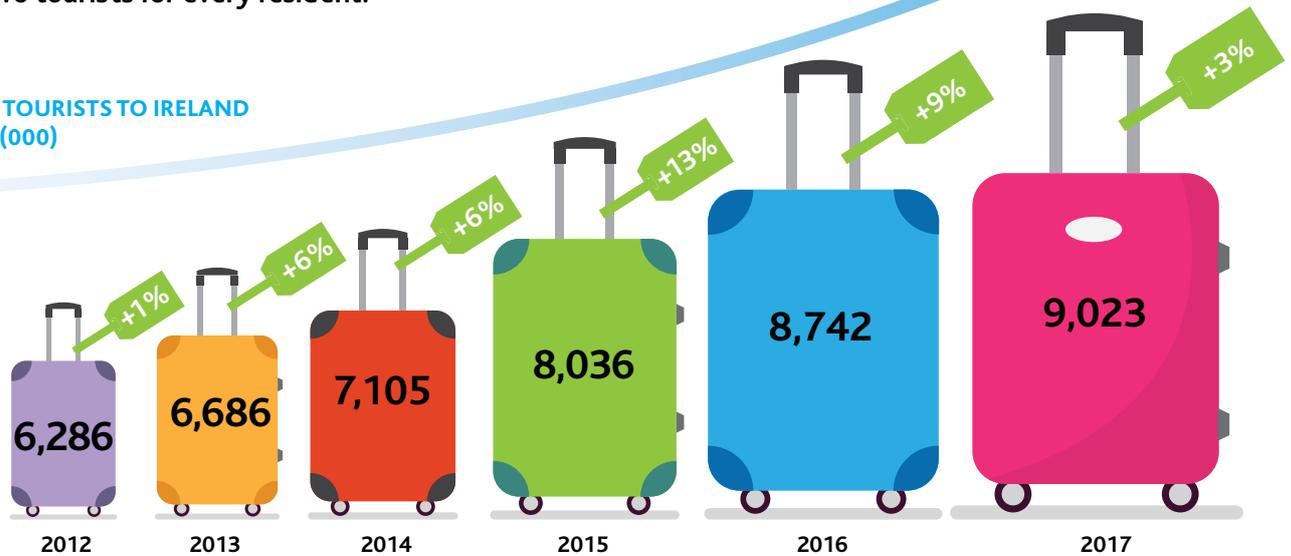
A SNAPSHOT OF KEY MARKETS

Tourism is a vital part of the Irish economy. It is integral to sustainable regional development and an important source of national employment (240,000 jobs in 2017).

Trend in Overseas Tourism Numbers (000)

Ireland welcomed 9 million overseas tourists in 2017, this is equivalent to almost two tourists for every resident.

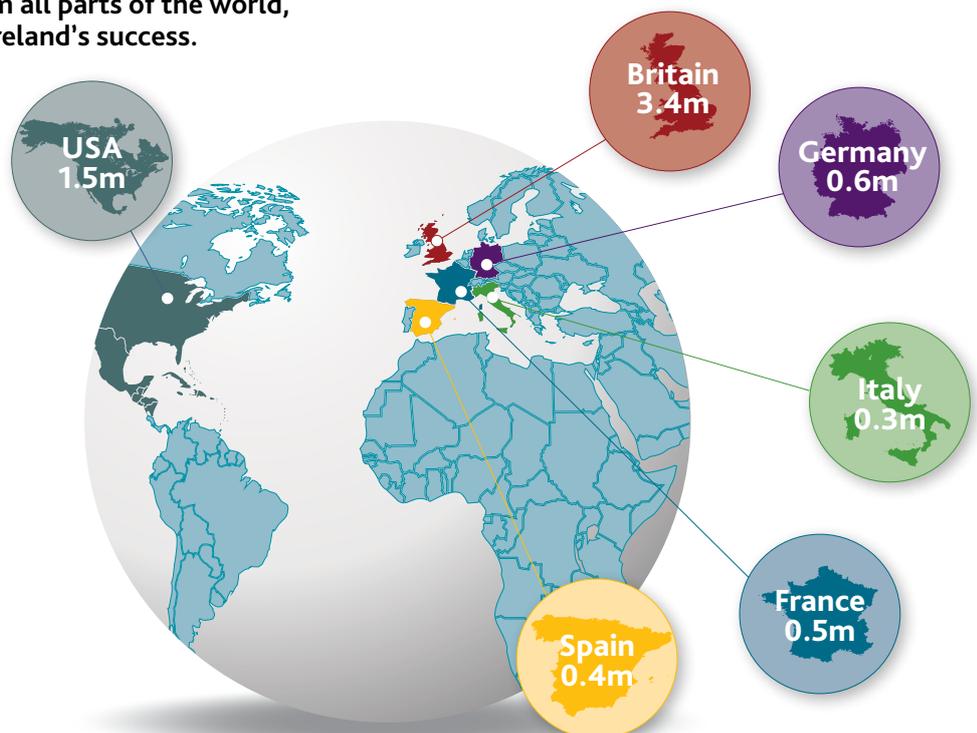
OVERSEAS TOURISTS TO IRELAND
2012-2017 (000)



Tourism Numbers

While Ireland welcomes tourists from all parts of the world, four core markets play a key role in Ireland's success.

Nearly seven-in-ten (68%) of Ireland's overseas tourists come from Britain, United States, Germany and France; accounting for €6 out of every €10 (62%) or €3 billion of revenue.

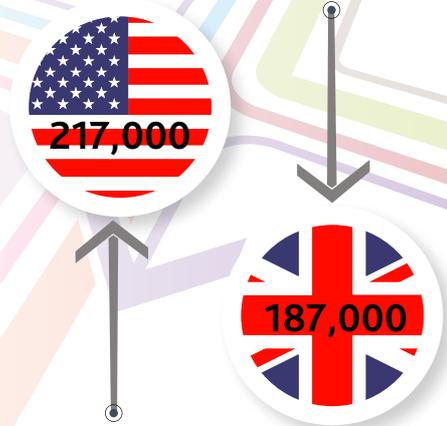


This overseas travel profile looks at overseas tourism with a focus on holidaymakers from Ireland's four key markets.

Growth in Tourism Numbers

Britain is Ireland's single largest market, however 2017 marked a decline in British tourist numbers (-5%), but this loss was offset overall by strong growth from the US (+17%).

The US market has been a consistently strong performer for Ireland, with high demand over the last five years and a double digit growth on average.



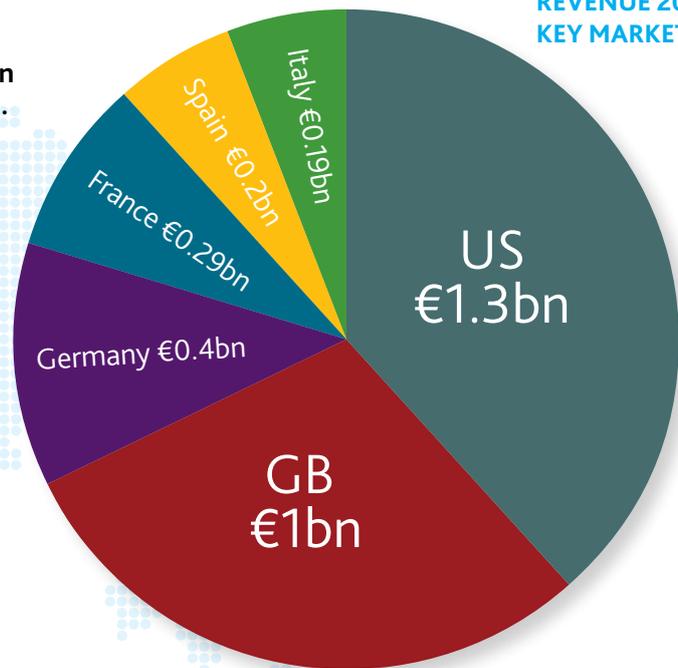
Revenue

Total overseas tourism accounted for €4.9 billion in revenue for Ireland in 2017; a 6% increase on 2016.

Britain remains Ireland's largest market for tourists (over double that of the US), however the US generates the largest income.

America is a high yield market due to its growing tourist numbers, high proportion of holidaymakers, preference for hotel accommodation and longer average stay.

REVENUE 2017
KEY MARKETS



TOURIST OR HOLIDAYMAKER?

Tourists include all travellers who stay away from home for one or more nights for either holiday, visiting friends and family, business or other purposes.

Holidaymakers are the largest subcategory of overseas tourist. They are a key focus of much of Ireland's developmental and marketing strategies as their choice of destination can be directly influenced.



Spotlight on Holidaymakers

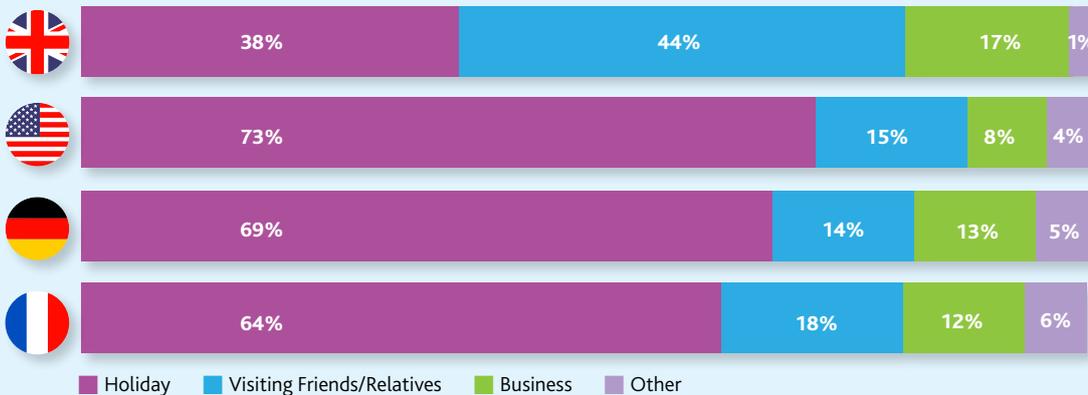
Holidaymakers are an important type of tourist, both in terms of their numbers and their value.



Tourists include those that stay one or more nights in Ireland and can be further defined based on their reason to visit



REASON FOR VISIT



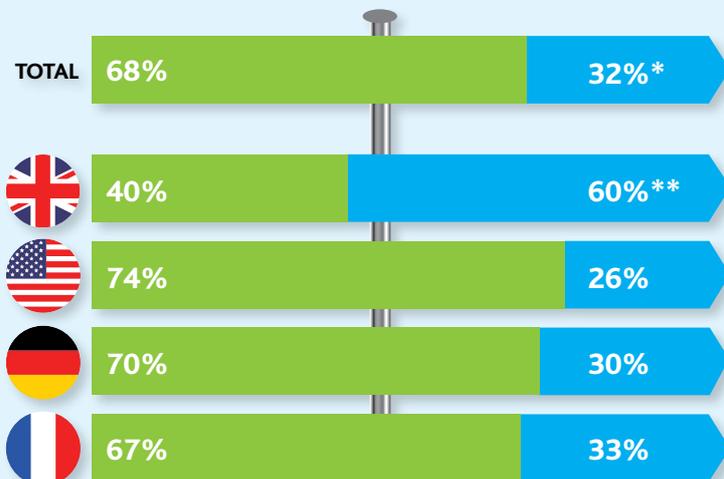
Most Americans (73%) visit Ireland for a holiday while, unsurprisingly due to their close familial ties, more British tourists come to visit friends and family (44%) than come for a holiday (38%).

REPEAT VISITS

On average one-third of holidaymakers to Ireland were repeat visitors.

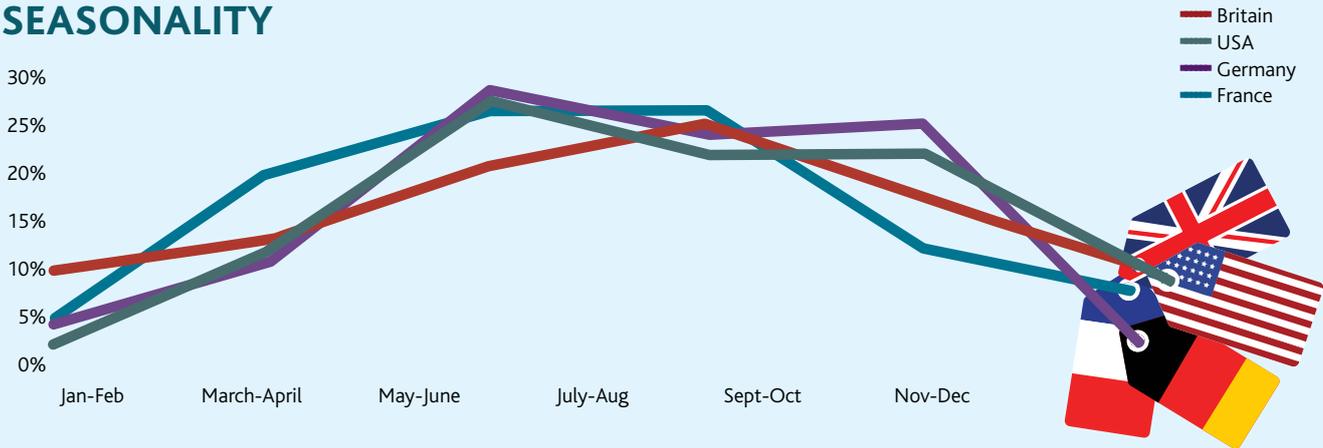
This highlights the opportunity to encourage holidaymakers to return by exceeding expectations and providing a compelling reason to come back.

- First Visit
- Repeat Visit



* 1% of all repeat visitors are Irish born
 ** 6% of repeat British visitors are Irish born

SEASONALITY

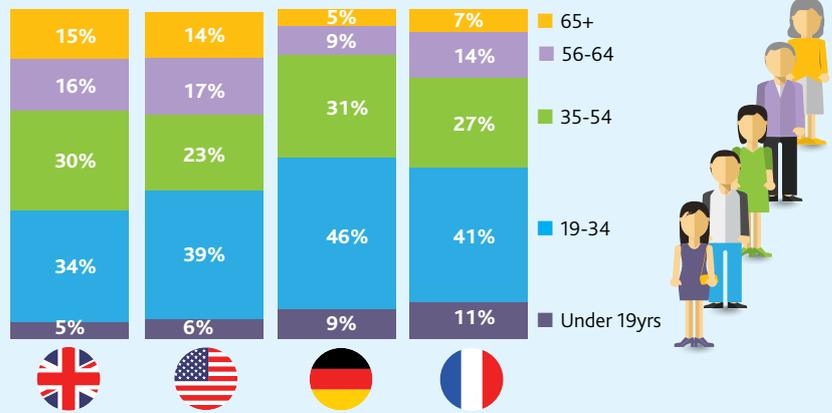


DEMOGRAPHICS

Ireland's holidaymakers are relatively young. On average, one-in-two (47%) are under 35.

German and French holidaymakers are among the youngest (55% and 52% respectively are 34 or under), and close to half (45%) of Americans also fall within this age group.

AGE

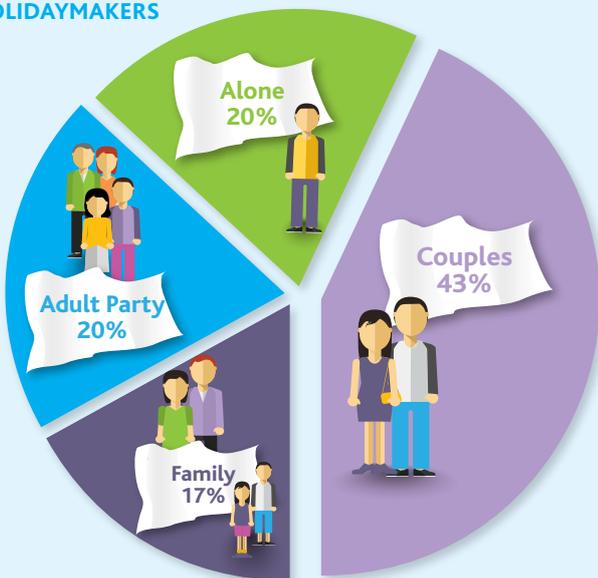


HOLIDAY PARTY TYPE

Tourists to Ireland tend to travel as part of a couple or adult party.

Britain and Germany are the markets least likely to travel in a family group.

TOTAL OVERSEAS HOLIDAYMAKERS

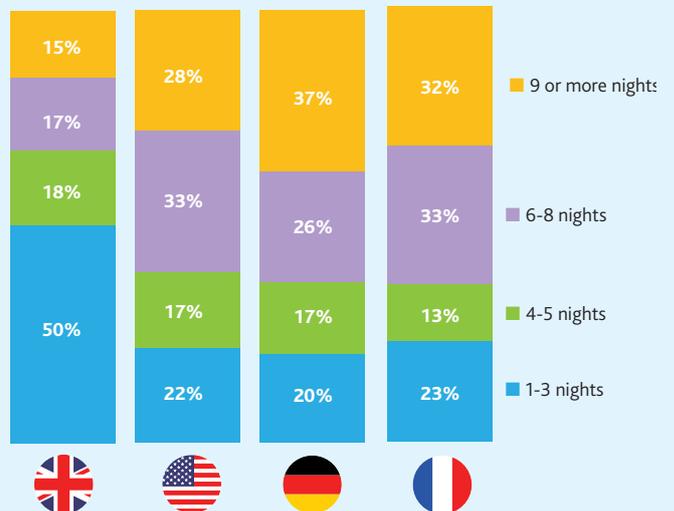


LENGTH OF STAY

Three-quarters (75%) of holidaymakers spend eight or fewer nights in Ireland.

Germans are most likely to opt for a longer holiday of eight nights or more (37%).

Seven in ten British holidaymakers stay five nights or less.



REGIONS VISITED*

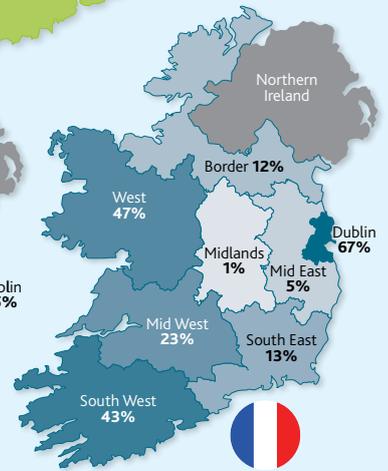
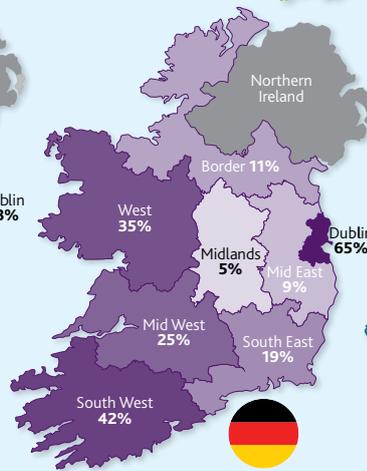
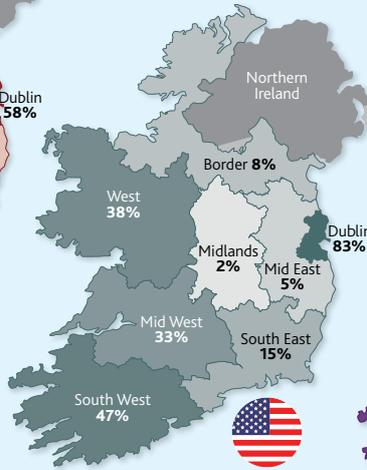
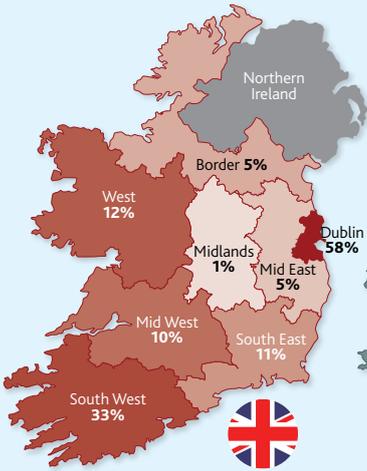
As a primary point of access Dublin is a very popular destination for three out of four holidaymakers (76%).

Dublin, the South-West, West and Mid-West feature as Ireland's most visited destinations across all key markets.

Dublin is most popular with Americans, 83% spending time there.

The South-East is more popular with Germans, while the border region attracts a higher proportion of French and German holidaymakers relatively.

TOTAL OVERSEAS

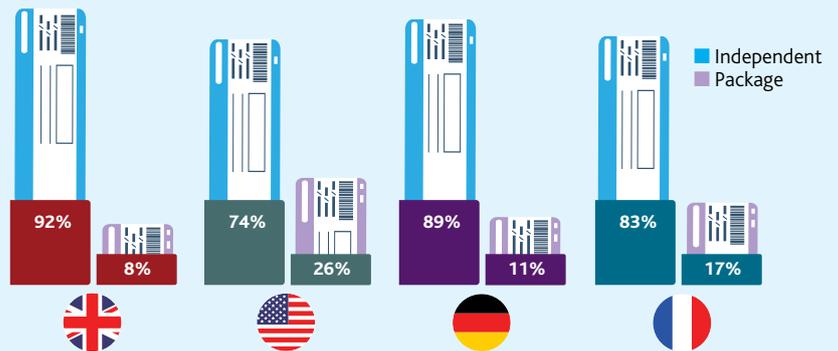


*Holidaymakers can visit more than one region, therefore the sum of regions adds up to more than 100%

TRAVEL ARRANGEMENTS

On average, four out of five holidaymakers (83%) book their holidays independently.

For one-in-two Americans (51%), Ireland is just one stop in a wider international trip. Therefore it stands to reason that they are the market most likely to book a package holiday.

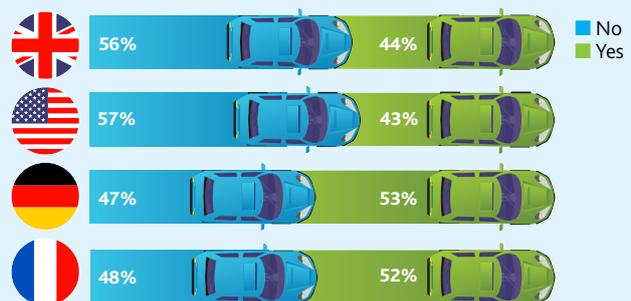


CAR USE

Two-in-five holidaymakers (42%) have access to a car. One-third (32%) rent a car while one-in-ten (10%) bring their own.

The remaining holidaymakers (58%) rely upon public transport for travel while in Ireland.

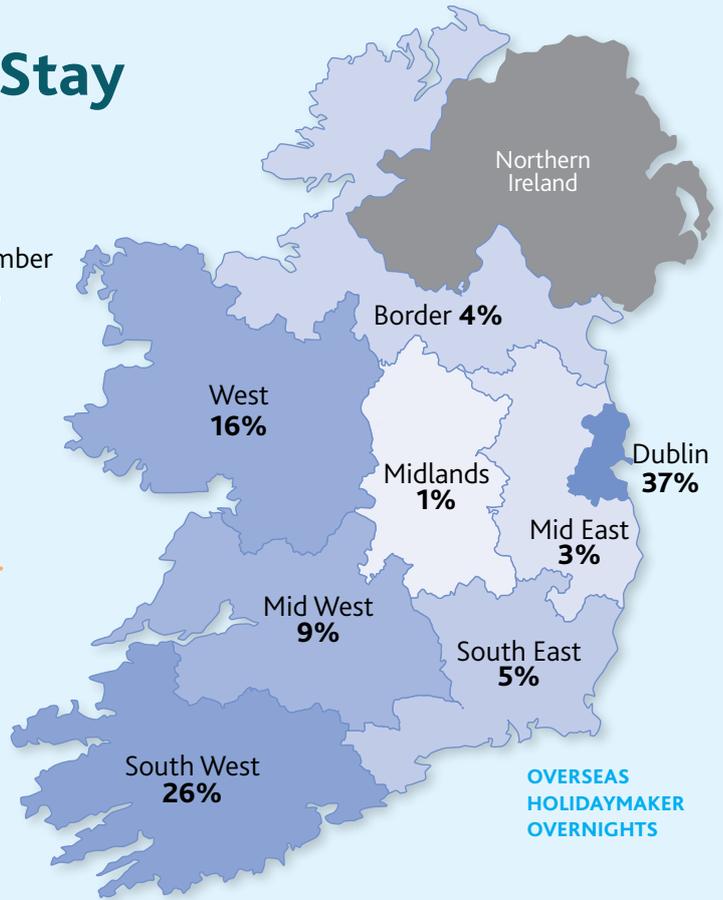
ACCESS TO A CAR



Where Holidaymakers Stay

Dublin, the South West and West account for the highest number of holiday nights.

In the case of Dublin a large volume of holidaymakers stay a relatively short time in the region. While the number of holidaymakers to the South West and West is lower, their length of stay is longer.



ACCOMMODATION NIGHTS

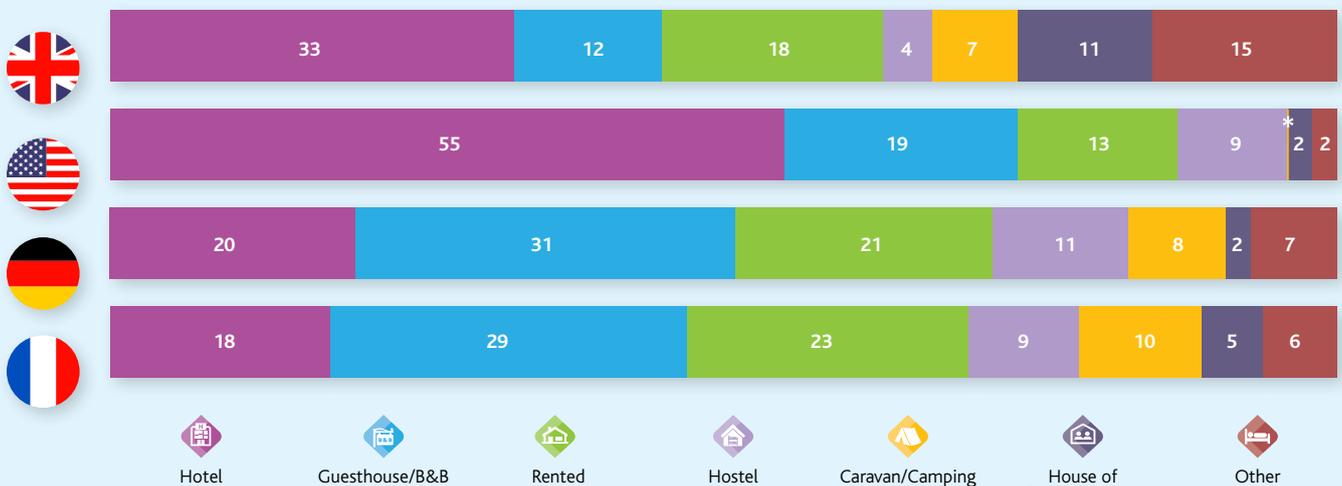
In general, holidaymakers spend the largest portion of holiday nights staying in hotels (38%) Guesthouses/B&Bs are next most popular for overnight stays (21%).

American and British holidaymakers favour hotels, while the French and Germans prefer guesthouse and B&Bs.

However relative to their stock levels, guesthouses/B&Bs perform very well in terms of popularity. There is just one guesthouse/B&B space for every eight hotel beds, yet one-in-five holidaymakers stay in a guesthouse/B&B.

Self-catering (rented accommodation) is also experiencing growth across all markets, highlighting changing trends in holidaymaker preferences.

ACCOMMODATION NIGHTS (%)



*Less than 0.5%