

TOURISM FACTS 2017

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All estimates are based on information from the CSO's Tourism & Travel 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), Tourism Experiences Post Survey, Accommodation Occupancy Survey, Visitor Attractions Survey, Domestic Omnibus Survey and Capita (Register of Accommodation).

Fáilte Ireland is responsible for the development and marketing of tourism within the Republic of Ireland.

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 2017

Expenditure by tourists visiting Ireland (excluding receipts paid to Irish carriers by foreign visitors) was estimated to be worth €5.3 billion in 2017, this represents growth of 4.2% on 2016. 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 2017 was estimated to be €8.8 billion.

Overseas tourist visits to Ireland in 2017 grew by 3.2% to 9.0 million. Overseas tourists from Britain have fallen by 5.1%, while our other markets continue to grow. Mainland Europe recorded growth of 5%. North America also performed very strongly, increasing by 16.1%. The long haul markets have also increase by 14.2% in 2017.

Britain remains our biggest source market for overseas tourists, representing 38.1% of all such visits (and 21.3% of spending by overseas tourists). The next biggest source market is Mainland Europe, which accounts for 36.1% of international volume. Some 19.0% of overseas tourists come from North America. The balance, 6.7%, comes from other long haul markets.

Economic benefits

In 2017, out-of-state tourist expenditure amounted to €5.3 billion. With a further €1.6 billion spent by overseas visitors on fares to Irish carriers, foreign exchange earnings were €7 billion. Domestic tourism expenditure amounted to €1.9 billion, making tourism a €8.8 billion industry.

Before allowing for receipts paid to Irish air and sea carriers by overseas tourists, the government earned estimated revenue of €1.7 billion through taxation of tourism. This grows to €2 billion when carrier receipts are factored into the analysis, of which €1.6 billion came from out-of-state tourism and the balance from domestic tourism. In 2017 the tourism industry accounted for 3.9% of all tax revenue.

In 2017 the value of exported goods and services was estimated at €355.4 billion of which €7 billion can be directly attributed to tourism (i.e., foreign exchange earnings), accounting for 2.0% 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 €8.8 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 164,900 in Q3 2017 (7.5% 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 240,000. This estimate includes an additional category of tourism services and attractions which is not covered by the CSO.

Tourism Numbers 2013 – 2017

Where did Ireland's tourists come from?

Numbers (000s)	2013	2014	2015	2016	2017
Britain	2,870	3,007	3,346	3,632	3,445
Mainland Europe	2,346	2,490	2,880	3,102	3,256
France	409	420	471	494	513
Germany	466	535	609	624	644
Italy	226	246	304	326	343
Spain	249	274	322	370	411
Netherlands	148	151	174	222	230
Belgium	95	99	121	127	123
Denmark	51	55	66	64	70
Sweden	72	60	64	59	75
Switzerland	73	84	105	107	104
Austria	51	57	53	58	60
Norway	50	50	58	50	54
Poland	152	140	161	176	171
All Other Europe	306	318	373	427	458
North America	1,039	1,146	1,294	1,477	1,715
USA	924	1,005	1,129	1,294	1,511
Canada	115	140	165	183	204
Rest of World	431	462	516	531	607
Australia, New Zealand & Other Oceania	192	191	204	206	208
Other Areas	240	271	312	325	399
Total Overseas	6,686	7,105	8,036	8,742	9,023
Northern Ireland ¹	1,572	1,708	1,492	1,358	1,315
Total out-of-state	8,258	8,813	9,528	10,100	10,338
Domestic trips ^{2,3}	8,413	8,991	9,125	9,359	9,626

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.

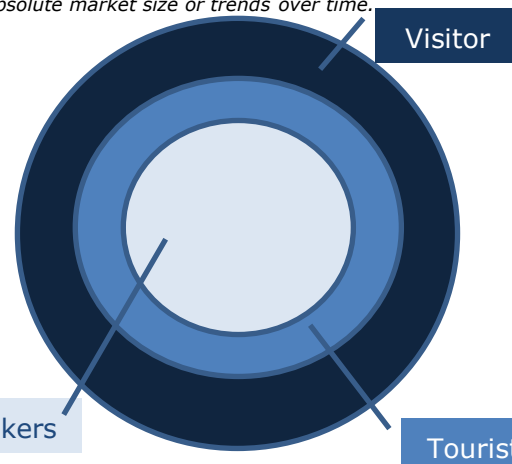
Source: CSO/Fáilte Ireland/TSB, NISRA

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



¹ Revised by NISRA May 2015

² 2012-2015 domestic data revised due to new methodological approach by CSO, August 2016

³ 2016 domestic data revised by CSO, December 2017

Tourism Revenue 2013 – 2017

How much money did they spend?

Revenue (€m)	2013 ⁴	2014	2015	2016	2017
Britain	890.9	926.7	1,017.9	1,109.8	1,046.5
Mainland Europe	1,228.2	1,301.2	1,555.3	1,657.5	1,763.0
North America	829.0	940.3	1,199.7	1,337.4	1,525.5
Other Overseas	367.7	428.1	492.6	533.3	588.9
TOTAL OVERSEAS	3,315.7	3,596.4	4,265.3	4,638.0	4,923.9
Northern Ireland ^{5, 6}	304.5	334.4	338.2	366.9	371.3
TOTAL OUT-OF-STATE	3,620.3	3,930.7	4,603.5	5,086.0	5,295.2
Carrier receipts ⁷	976.0	1,166.0	1,322.0	1,479.0	1,611.0
Overseas same-day visits	35.0	41.0	38.0	48.0	53.0
TOTAL FOREIGN EXCHANGE EARNINGS	4,631.3	5,137.7	5,963.5	6,613.0	6,959.2
Domestic trips ^{8,9}	1,533.0	1,713.5	1,725.3	1,797.7	1,879.1
TOTAL TOURISM REVENUE	6,164.3	6,851.2	7,688.8	8,410.7	8,838.3
<i>TOURISM REVENUE EXCLUDING CARRIER RECEIPTS</i>	<i>5,188.3</i>	<i>5,685.2</i>	<i>6,366.8</i>	<i>6,931.7</i>	<i>7,227.3</i>

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 2017

Overseas tourists	€70
Overseas holidaymakers	€91
Domestic overnight trips	€74

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 20 jobs in the tourism industry.

4 Revised March 2014

5 NISRA GBP: Northern Ireland resident expenditure data provided in STF. 2016 Euro exchange rate 0.81948 Source: Central Bank of Ireland

6 2013 Revised by NISRA May 2015 2015 revised 2016

7 2013 and 2014 revised March 2016

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

9 2016 domestic data revised by CSO, December 2017

Regional Performance 2017

Where did tourists go in 2017? (EUROSTAT NUTS 3 REGIONS, see pg 10)

Numbers (000s) Revenue (€m)	Britain	Mainland Europe	North America	Other Areas	All Overseas	Northern Ireland	Domestic Trips
Dublin	1,777	2,353	1,353	453	5,936	332	1,497
	324	747	589	321	1,981	107	307
Mid East ¹⁰	270	228	94	42	633	57	747
	78	76	34	19	207	13	125
Midlands ¹¹	91	75	40	11	218	15	422
	33	34	13	6	85	4	71
South East	331	351	213	59	954	46	1,374
	103	85	69	15	271	14	253
South West	692	857	719	171	2,439	69	2,077
	213	341	337	77	968	36	419
Mid West	347	476	454	110	1,387	41	879
	84	132	174	54	444	13	162
West	346	806	594	166	1,911	109	1,622
	103	269	255	67	694	43	353
Border	318	244	145	40	746	648	1,008
	109	78	54	31	271	141	189

Source: CSO/Fáilte Ireland NISRA

Overseas Tourists in 2017

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	30	28	33	29	28
Other food & drink	36	41	34	35	36
Sightseeing/entertainment	6	6	7	7	6
Internal transport	13	12	13	14	12
Shopping	13	12	12	14	17
Miscellaneous	1	1	1	1	2

¹⁰ Caution – small sample sizes in individual market areas

¹¹ Caution – small sample sizes in individual market areas

When did they arrive? ¹²

Seasonality (%)	Total	Britain	Mainland Europe	North America	Rest of World
January-March	18	21	17	14	18
April	8	8	9	7	7
May	9	9	10	10	10
June	10	8	10	12	11
July	10	9	11	11	12
August	11	11	11	12	12
September	10	9	9	11	10
October-December	23	25	22	21	21

Source: Fáilte Ireland estimates based on CSO

How did they arrive/depart?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Air					
From Britain	35	74	5	20	31
From Mainland Europe	40	1	88	25	29
Transatlantic	11	1	1	52	2
Asia/Middle East	2	-	-	-	28
Sea					
From Britain	8	17	2	2	5
From Mainland Europe	1	-	2	-	-
Via N. Ireland					
	3	6	1	2	5

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	25	15	30	11
Guesthouses/B&Bs	8	5	9	12	3
Self-catering	20	8	21	20	33
Caravan & camping	1	1	1	*	*
Hostels	3	2	4	5	2
Friends/relatives	27	51	20	18	26
Other	22	8	30	15	25

Source: SOT

Nights (Million) 2017	70.0	17.6	28.6	14.7	9.1
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Source (Fáilte Ireland Estimates)

(* indicates less than 0.5 percent)

What activities did they engage in?

	Overseas Participants (000s)
Hiking/cross country walking	2,352
Cycling	416
Golf	257
Equestrian	142
Angling	135

What was their main reason for visiting Ireland?

(000s)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	4,721	1,317	1,871	1,246	288
Visit friends/relatives	2,615	1,505	639	266	204
Business	1,294	572	510	132	80
Other	394	51	237	71	35

Source: CSO and NISRA

In 2017, a quarter (25%) of those coming to Ireland to visit friends/relatives were born in Ireland.

¹² Easter weekend fell in April 2017

Overseas Holidaymakers 2017

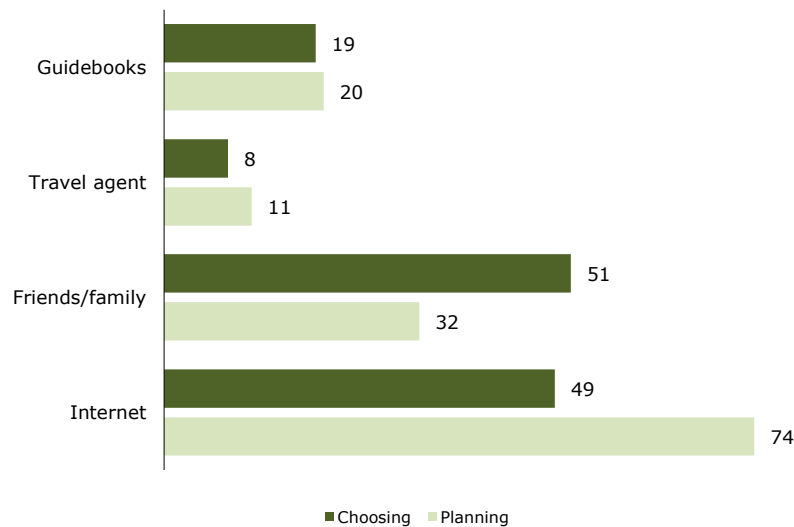
Holidaymakers in this section are defined as tourists who stated that their primary purpose for visiting Ireland was a holiday.

What was the total number of holidaymakers in 2017?

Holidaymakers (000s)	2013	2014	2015	2016	2017
Britain	979	1,057	1,254	1,423	1,317
Mainland Europe	1,227	1,314	1,612	1,699	1,871
North America	718	803	926	1,041	1,246
Rest of World	220	219	243	242	288
Total	3,144	3,393	4,036	4,406	4,721

Source: CSO and NISRA

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



Source: Fáilte Ireland's Tourism Experience Port Survey 2017

How did they arrange their holiday?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Package*	17	8	12	26	22
Independent	83	92	88	74	78

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

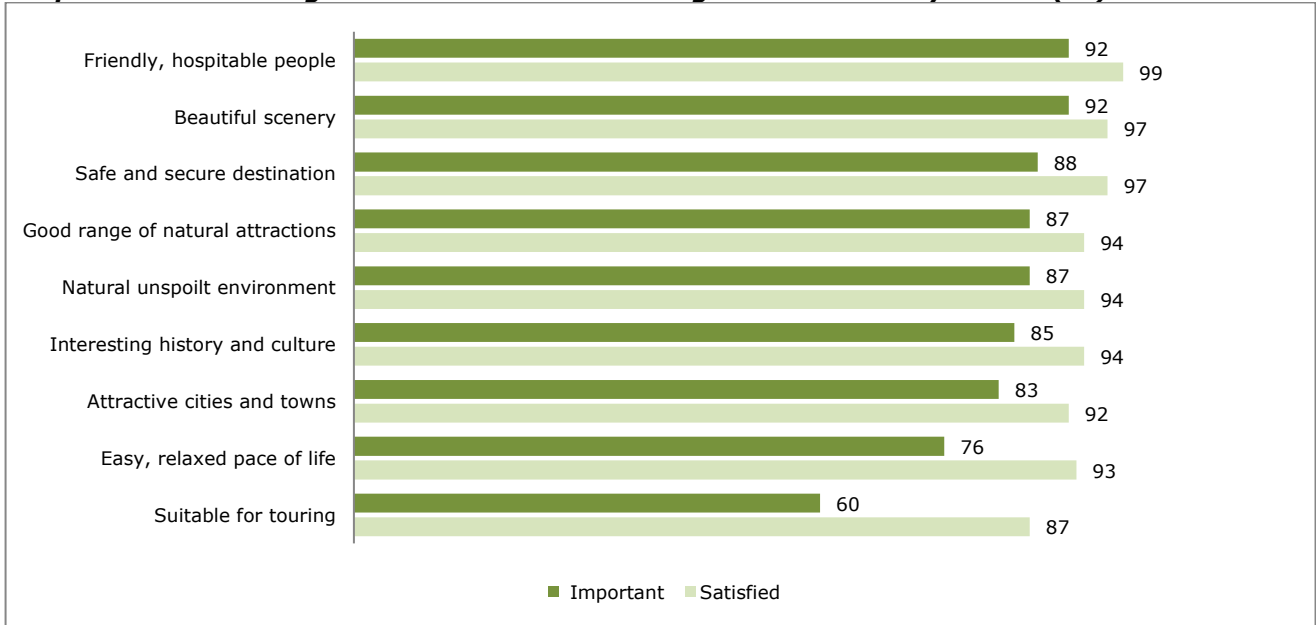
Source: Fáilte Ireland's Survey of Overseas Travellers

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

Experience of Ireland		Use of car		Age		Social class		Party composition	
First visit	68	Car brought	10	Under 25 years	21	Mgr/prof (AB)	27	Alone	20
Repeat	31	Car hired	32	25-34 years	25	White collar (C1)	59	Couple	43
Irish-born	1	Car not used	58	35-44 years	11	Skilled worker (C2)	10	Family	17
				45+ years	42	Unskilled worker (DE)	3	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 Post Survey 2017

- *What factors are important to holidaymakers when considering Ireland for their holiday*
- *Holidaymakers' satisfaction with their experience of Ireland*

Domestic Tourism in 2017¹³

Domestic trips (000s) by purpose of travel

	2013	2014	2015	2016	2017
Holiday trips	4,073	4,436	4,658	4,870	4,886
- Long (4+ nights)	1,088	1,144	1,078	1,144	962
- Short (1-3 nights)	2,985	3,292	3,580	3,726	3,924
Visiting friends/relatives trips	2,988	2,918	2,921	3,045	3,096
Business trips	364	453	407	431	426
Other trips	988	1,184	1,138	1,014	1,218
Total trips	8,413	8,991	9,125	9,359	9,626

Source: CSO Household Travel Surveys 2013-2017

Domestic expenditure (€m) by purpose of travel

	2013	2014	2015	2016	2017
Holiday trips	947.2	992.8	1,070.4	1,135.8	1,129.2
- Long (4+ nights)	395.2	385.6	394.2	420.7	349.5
- Short (1-3 nights)	552.0	607.1	676.2	715.0	779.7
Visiting friends/relatives trips	284.8	327.0	296.5	297.0	353.1
Business trips	84.2	110.3	98.0	106.3	123.3
Other trips	216.8	283.4	260.4	258.6	273.4
Total expenditure	1,533	1,713.5	1,725.3	1,797.7	1,879.1

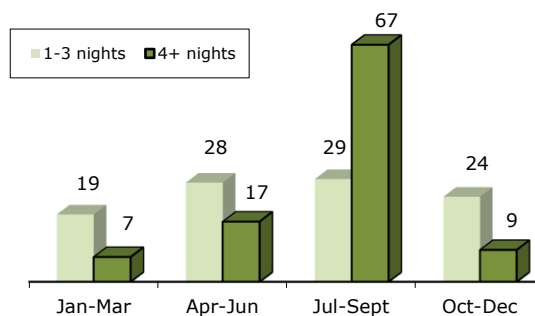
Source: CSO Household Travel Surveys 2013-2017

Accommodation bednights domestic holidaymakers (%)

	2013	2014	2015	2016	2017
Hotels	34	34	35	36	37
Guesthouse/B&Bs	3	4	4	4	4
Caravan/camping	15	14	7	13	14
Self-catering	22	23	22	20	20
Holiday home	15	12	19	13	11
Friends/relatives	10	13	10	13	11
Other	1	1	3	2	2

Source: CSO Household Travel Surveys 2013-2017

Seasonality of holidaymakers (%) 2017 by length of stay



Source: CSO Household Travel Survey 2017

¹³ 2012-2015 domestic data revised due to new methodological approach by CSO, August 2016

Activities engaged in by domestic holidaymakers (%)

Houses/castles	26
Hiking/walking	25
National parks	23
Gardens	21
Visits to spas	21
Watersports (excluding swimming)	19
Heritage/ interpretive centres	18
Monuments	16
Attending a festival/event	16
Museums/art galleries	15
Attending a sporting event	9
Cycling	8
Golf	6
Angling	3
Attending horse racing	3

Source: Fáilte Ireland Domestic Omnibus 2017

The Tourism Product

Accommodation in 2017

	Premises	Rooms
Hotels	819	58,088
Guesthouses	190	2,467
Bed and Breakfasts	1,132	4,815
	Premises	Beds
Self-Catering (units)	2,721	14,793
Hostels	90	7,603
Welcome Standard ¹⁴	234	16,606
Caravan & camping (pitches)	5,822	26,112

Source: Capita

Accommodation occupancy in 2017

	%
Hotel Room Occupancy	72
Guesthouse Room Occupancy	63
B&B Room Occupancy	46
Hostels Bed Occupancy	65
Self-Catering Bed Occupancy	35
Caravan and Camping Bed Occupancy	27

Source: Fáilte Ireland Accommodation Survey

¹⁴ Excludes Marinas

Attendance at popular visitor attractions in Ireland 2017

Top Fee-Charging Attractions			Top Free Attractions		
Name of Attraction	County	Visits	Name of Attractions	County	Visits
Guinness Storehouse	Dublin	1,711,281	National Gallery of Ireland	Dublin	1,065,929
Cliffs of Moher Visitor Experience	Clare	1,527,000	Castletown House Parklands	Kildare	666,541
Dublin Zoo	Dublin	1,264,300	Glendalough Site	Wicklow	639,826
National Aquatic Centre	Dublin	1,099,756	National Botanic Gardens	Dublin	569,652
Book of Kells	Dublin	983,410	DLR Lexicon ¹	Dublin	525,708
Tayto Park	Meath	735,000	Irish Museum of Modern Art	Dublin	489,295
St Patrick's Cathedral	Dublin	603,000	Doneraile Wildlife Park	Cork	480,000
Kylemore Abbey & Gardens	Galway	558,000	National Museum of Ireland - Archaeology, Kildare St	Dublin	474,564
Muckcross House Gardens and Traditional Farm	Kerry	552,923	Science Gallery at Trinity College Dublin	Dublin	407,529
Powerscourt Gardens & Waterfall	Wicklow	501,601	Farmleigh	Dublin	359,432
Fota Wildlife Park	Cork	455,559	Newbridge Silverware Museum of Style Icons	Kildare	350,000
Blarney Castle & Gardens	Cork	450,000	National Museum of Ireland - Natural History, Merrion St	Dublin	336,412
Kilmainham Gaol	Dublin	425,000	Kilkenny Castle Parklands	Kilkenny	336,315
Kilkenny Castle	Kilkenny	418,685	Chester Beatty Library National Museum of Ireland - Decorative Arts & History, Collins Barracks	Dublin	335,875
Rock of Cashel	Tipperary	376,488	Connemara National Park	Galway	221,713
Dublin Castle	Dublin	371,000	The National Library of Ireland	Dublin	197,245
Bunratty Castle & Folk Park	Clare	369,275	Crawford Art Gallery	Cork	188,814
Old Jameson Distillery	Dublin	286,000	Malin Head Viewing Point	Donegal	172,329
Brú na Bóinne Newgrange	Meath	281,103	Dublin City Gallery The Hugh Lane	Dublin	167,410
Christ Church Cathedral	Dublin	238,285	Sliabh Liag Cliffs	Donegal	164,546
Glenveagh Castle and Grounds	Donegal	211,000			

Source: Fáilte Ireland's Survey of Visitor Attractions - Estimates of visitors to attractions may include usage by local residents

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