

Key Tourism Facts 2018



Fáilte Ireland
Research

SEPTEMBER 2019

Contents

[Tourism Facts 2018](#)

[Tourism Numbers
2014-2018](#)

[Tourism Revenue
2014-2018](#)

[Regional
Performance 2018](#)

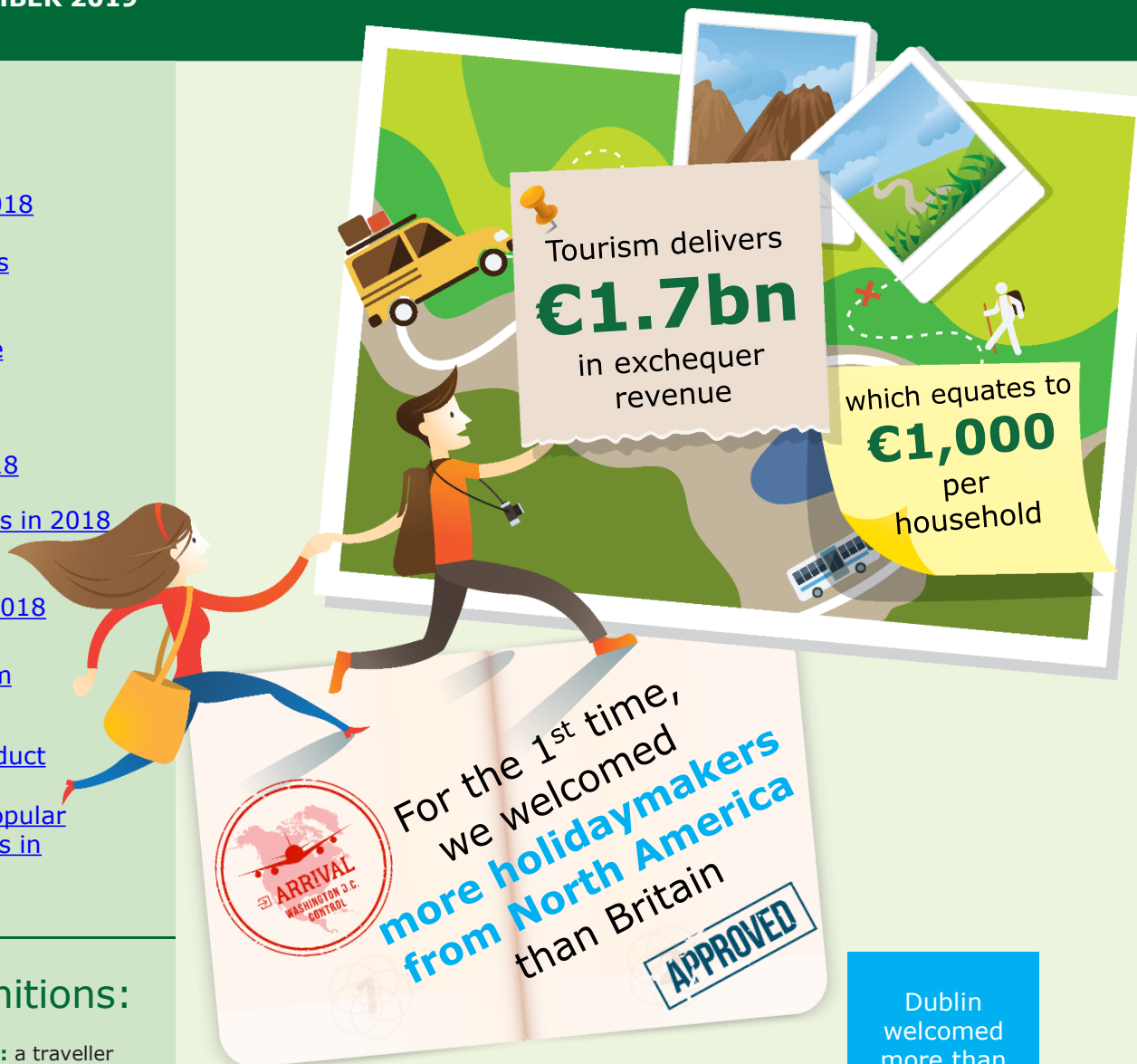
[Overseas Tourists in 2018](#)

[Overseas
Holidaymakers 2018](#)

[Domestic Tourism
in 2018](#)

[The Tourism Product](#)

[Attendance at popular
visitor attractions in
Ireland 2018](#)



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



Dublin welcomed more than **6 million** overseas tourists for the first time. They spent **€2.1bn** worth **€1,500 per head** of Dublin's population



Click on this icon brings you back to first page



Expenditure by tourists visiting Ireland (excluding receipts paid to Irish carriers by foreign visitors) was estimated to be worth €5.6 billion in 2018, this represents growth of 6% on 2017. 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 2018 was estimated to be €9.4 billion.

Overseas tourists to Ireland in 2018 grew by 6.5% to 9.6 million. Overseas tourists from Britain grew by 1% while our other markets continue to grow at a stronger rate. Mainland Europe recorded growth of 7.8%. North America also performed very strongly, increasing by 14.5%. The long haul markets have also increased by 7.8% in 2018.

Mainland Europe accounts for 36.5% of our overseas tourists, however, Britain is still our largest individual market with 36.2% of overseas tourists to Ireland. Some 20.4% come from North America and the balance, 6.8%, comes from other long haul markets. Revenue from Mainland Europe and North America equates to 35.4% and 33.5% of overseas tourism revenue respectively. British tourists account for 19.6% of overseas tourism spend in Ireland with 11.5% spent by other long haul tourists.

ECONOMIC BENEFITS

In 2018, out-of-state (Overseas and North Ireland) tourist expenditure amounted to €5.6 billion. With a further €1.7 billion spent by overseas visitors on fares to Irish carriers, foreign exchange earnings were €7.4 billion. Domestic tourism expenditure amounted to €2 billion, making tourism a €9.4 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 2018 the tourism industry accounted for 4.0% of all tax revenue.

In 2018 the value of exported goods and services was estimated at €396.4 billion of which €7.4 billion can be directly attributed to tourism (i.e., foreign exchange earnings), accounting for 1.9% 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 €9.4 billion, which represents 3.7% of GNP in revenue terms.

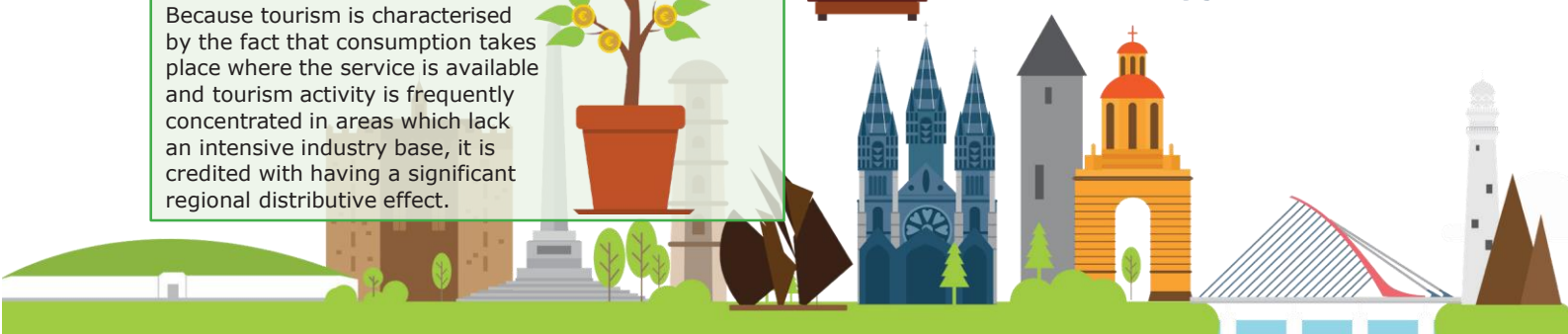
Because tourism is characterised by the fact that consumption takes place where the service is available and tourism activity is frequently concentrated in areas which lack an intensive industry base, it is credited with having a significant regional distributive effect.



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 181,200 in Q3 2018 (8% 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.

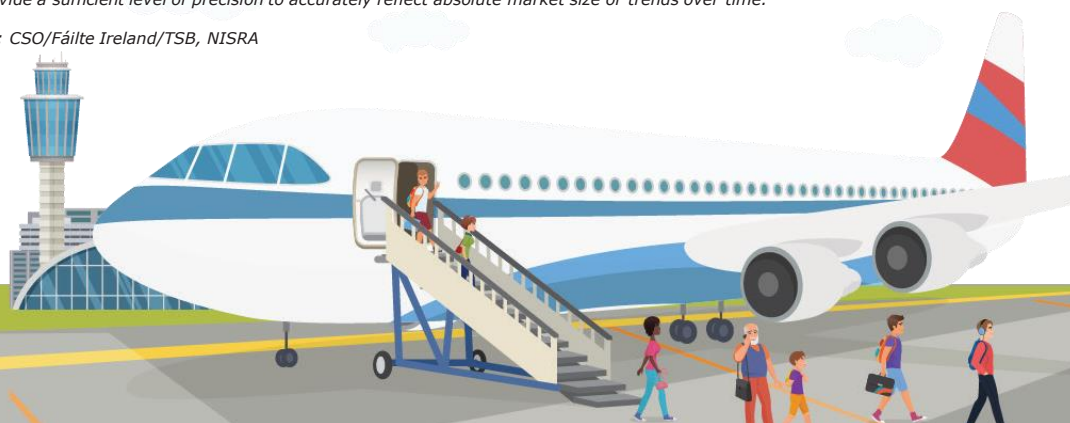




Tourist Numbers (000s)	2014	2015	2016	2017	2018	Change 18 vs 17
Britain	3,007	3,346	3,632	3,445	3,480	1.0%
Mainland Europe	2,490	2,880	3,102	3,256	3,512	7.8%
France	420	471	494	512	525	2.5%
Germany	535	609	624	644	763	18.4%
Italy	246	304	326	343	376	9.7%
Spain	274	322	370	411	404	-1.6%
Netherlands	151	174	222	230	229	-0.7%
Belgium	99	121	127	123	128	3.6%
Denmark	55	66	64	70	68	-3.1%
Sweden	60	64	59	75	75	-0.2%
Switzerland	84	105	107	104	111	7.0%
Austria	57	53	58	60	68	13.8%
Norway	50	58	50	54	53	-3.1%
Poland	140	161	176	171	188	10.0%
All Other Europe	318	373	427	458	524	14.4%
North America	1,146	1,294	1,477	1,715	1,963	14.5%
USA	1,005	1,129	1,294	1,511	1,739	15.1%
Canada	140	165	183	204	224	9.8%
Rest of World	462	516	531	607	654	7.8%
Australia, New Zealand & Other Oceania	191	204	206	208	226	9.0%
Other Areas	271	312	325	399	428	7.0%
Total Overseas	7,105	8,036	8,742	9,023	9,609	6.5%
Northern Ireland ¹	1,708	1,492	1,358	1,315	1,338	1.7%
Total out-of-state	8,813	9,528	10,100	10,338	10,947	5.9%
Domestic trips ^{2,3}	8,991	9,125	9,359	9,626	10,919	13.4%

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 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



Revenue (€m)	2014	2015	2016	2017	2018	Change 18 vs 17
Britain	926.7	1,017.9	1,109.8	1,046.5	1,024.8	-2%
Mainland Europe	1,301.2	1,555.3	1,657.5	1,763.0	1,845.8	5%
North America	940.3	1,199.7	1,337.4	1,525.5	1,746.7	15%
Other Overseas	428.1	492.6	533.3	588.9	599.9	2%
TOTAL OVERSEAS	3,596.4	4,265.3	4,638.0	4,923.9	5,217.3	6%
Northern Ireland ^{4,5}	334.4	338.2	366.9	371.3	394.6	6%
TOTAL OUT-OF-STATE	3,930.7	4,603.5	5,004.9	5,295.2	5,611.9	6%
Carrier receipts ⁶	1,166.0	1,322.0	1,487.0	1,611.0	1,725.0	7%
Overseas same-day visits	41.0	38.0	48.0	53.0	47.0	-11%
TOTAL FOREIGN EXCHANGE EARNINGS	5,137.7	5,963.5	6,539.9	6,959.2	7,383.9	6%
Domestic trips ^{7,8}	1,713.5	1,725.3	1,797.7	1,879.1	2,006.0	7%
TOTAL TOURISM REVENUE	6,851.2	7,688.8	8,337.6	8,838.3	9,389.9	6%
<i>TOURISM REVENUE EXCLUDING CARRIER RECEIPTS</i>	5,685.2	6,366.8	6,850.6	7,227.3	7,664.9	6%

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 2018

Overseas tourists €72

Overseas holidaymakers €94

Domestic overnight trips €71

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.

4. NISRA GBP: Northern Ireland resident expenditure data provided in STE 2018 Euro exchange rate 0.88471 Source: Central Bank of Ireland
5. 2015 Revised by NISRA 2016
6. 2014 revised by CSO March 2016, 2016 revised by CSO December 2018
7. 2012-2015 domestic data revised due to new methodological approach by CSO, August 2016
8. Domestic data revised by CSO, December 2017



Where did tourists go in 2018?

REGIONAL PERFORMANCE 2018



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Border		
Market	Numbers (000's)	Revenue (€m)
Britain	283	99
Mainland Europe	246	74
North America	147	43
Other Areas	76	28
All Overseas	752	244
Northern Ireland	644	153
Domestic	1,001	180

West		
Market	Numbers (000's)	Revenue (€m)
Britain	332	116
Mainland Europe	807	260
North America	677	295
Other Areas	149	56
All Overseas	1,963	727
Northern Ireland	95	31
Domestic	1,662	337

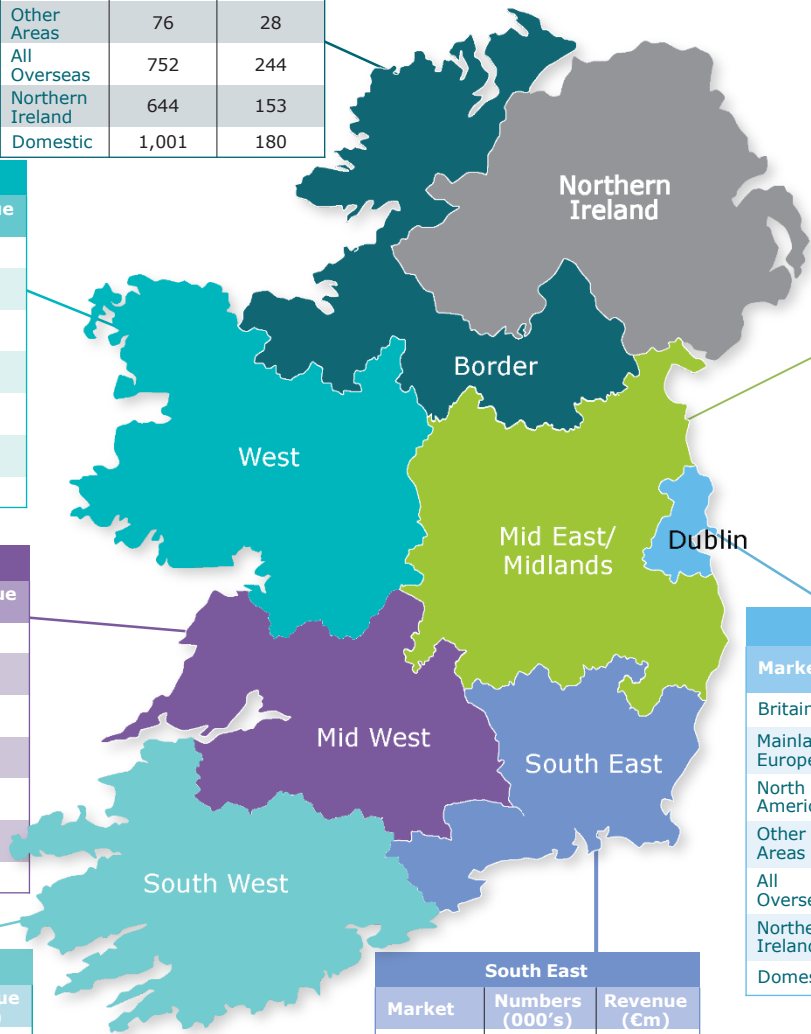
Mid West		
Market	Numbers (000's)	Revenue (€m)
Britain	368	109
Mainland Europe	481	144
North America	565	217
Other Areas	83	41
All Overseas	1,497	511
Northern Ireland	13	5
Domestic	1,090	167

South West		
Market	Numbers (000's)	Revenue (€m)
Britain	616	179
Mainland Europe	924	347
North America	803	384
Other Areas	169	77
All Overseas	2,512	987
Northern Ireland	72	48
Domestic	2,401	474

South East		
Market	Numbers (000's)	Revenue (€m)
Britain	296	83
Mainland Europe	358	86
North America	296	70
Other Areas	78	22
All Overseas	1,028	261
Northern Ireland	22	8
Domestic	1,683	304

Mid East / Midlands		
Market	Numbers (000's)	Revenue (€m)
Britain	419	122
Mainland Europe	356	151
North America	184	76
Other Areas	70	45
All Overseas	1,030	393
Northern Ireland	196	51
Domestic	1,381	201

Dublin		
Market	Numbers (000's)	Revenue (€m)
Britain	1,817	318
Mainland Europe	2,519	784
North America	1,494	662
Other Areas	479	331
All Overseas	6,309	2,095
Northern Ireland	295	99
Domestic	1,700	343



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	30	28	34	27	30
Other food & drink	36	41	35	36	34
Sightseeing/entertainment	6	6	6	7	6
Internal transport	14	13	14	15	11
Shopping	13	11	11	14	18
Miscellaneous	1	1	1	1	1

Source: Fáilte Ireland's Survey of Overseas Travellers

When did they arrive? (%)

TOTALS	
January-March	18
April	8
May	10
June	10
July	11
August	11
September	9
October-December	23

Britain	
January-March	21
April	9
May	9
June	8
July	9
August	11
September	8
October-December	24

Mainland Europe	
January-March	18
April	9
May	10
June	10
July	11
August	11
September	9
October-December	22

North America	
January-March	14
April	7
May	10
June	12
July	13
August	12
September	11
October-December	22

Rest of World	
January-March	17
April	7
May	8
June	10
July	13
August	13
September	10
October-December	22

Source: Fáilte Ireland estimates based on CSO

How did they arrive/depart? (%)

TOTALS	
Air	
From Britain	33
From Mainland Europe	41
Transatlantic	12
Asia/Middle East	2
Sea	
From Britain	7
From Mainland Europe	1
Via Northern Ireland	3

Britain	
Air	
From Britain	74
From Mainland Europe	2
Transatlantic	2
Asia/Middle East	-
Sea	
From Britain	16
From Mainland Europe	-
Via Northern Ireland	7

Mainland Europe	
Air	
From Britain	5
From Mainland Europe	87
Transatlantic	2
Asia/Middle East	-
Sea	
From Britain	2
From Mainland Europe	3
Via Northern Ireland	1

North America	
Air	
From Britain	19
From Mainland Europe	26
Transatlantic	51
Asia/Middle East	-
Sea	
From Britain	2
From Mainland Europe	-
Via Northern Ireland	2

Rest of World	
Air	
From Britain	29
From Mainland Europe	28
Transatlantic	2
Asia/Middle East	30
Sea	
From Britain	5
From Mainland Europe	-
Via Northern Ireland	5

Source: CSO



Overseas Tourists 2018



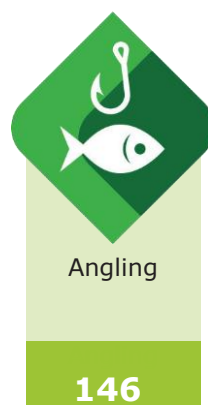
Where did they stay?



Accommodation Nights %	Total	Britain	Mainland Europe	North America	Rest of World
Hotels	22	25	17	30	16
Guesthouses/B&Bs	9	6	10	12	7
Self-catering	21	11	22	17	37
Caravan & camping	2	2	3	*	1
Hostels	4	1	5	5	4
Friends/relatives	26	46	21	18	25
Other	16	9	22	18	10
<i>Source: Fáilte Ireland's Survey of Overseas Travellers</i>					
Nights (Million) 2018	72.5	16.5	30.9	16.0	9.1
<i>Source: CSO and NISRA</i>					

(* indicates less than 0.5 percent)

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



Source: Overseas – Fáilte Ireland estimates based on Survey of Travellers

What was their main reason for visiting Ireland?

(000's)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	5,256	1,372	2,091	1,468	325
Visit Friends/Relatives	2,705	1,496	724	278	207
Business	1,248	563	468	134	83
Other	400	50	229	83	39

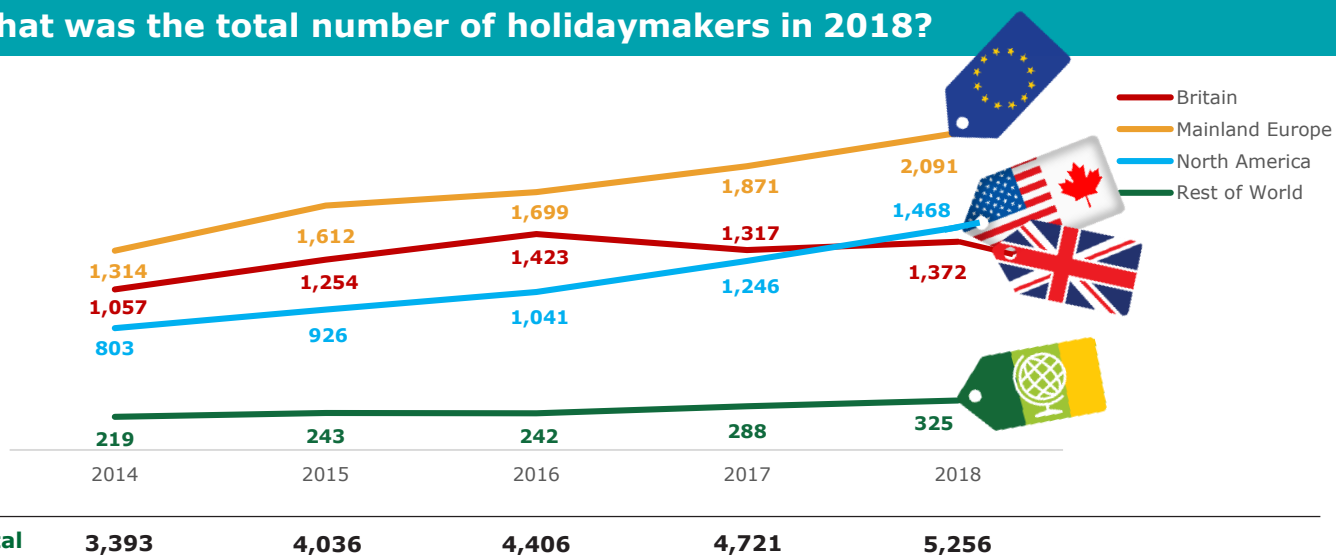
Source: CSO and NISRA



In 2018, just over one in five (21%) of those coming to Ireland to visit friends/relatives were born in Ireland.

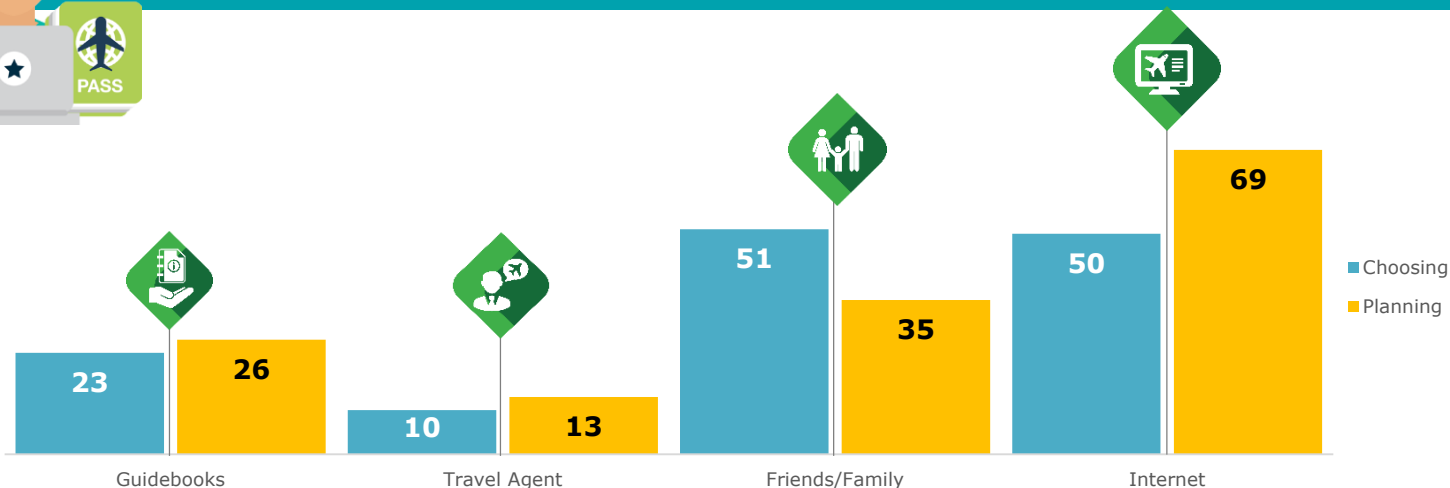


What was the total number of holidaymakers in 2018?



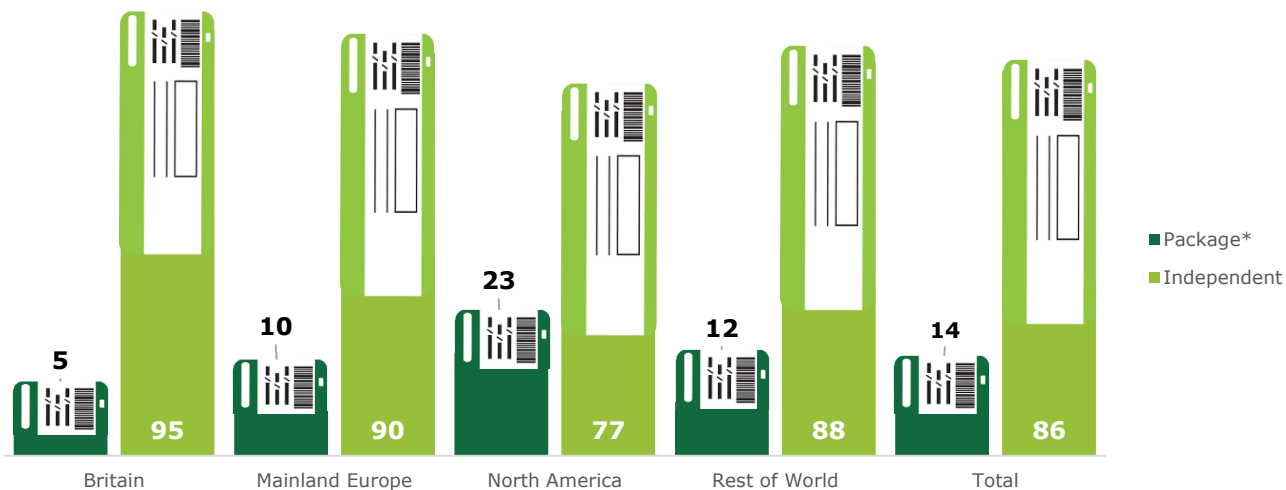
Source: CSO and NISRA

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



Source: Fáilte Ireland's Tourism Experience Port Survey 2018

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

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



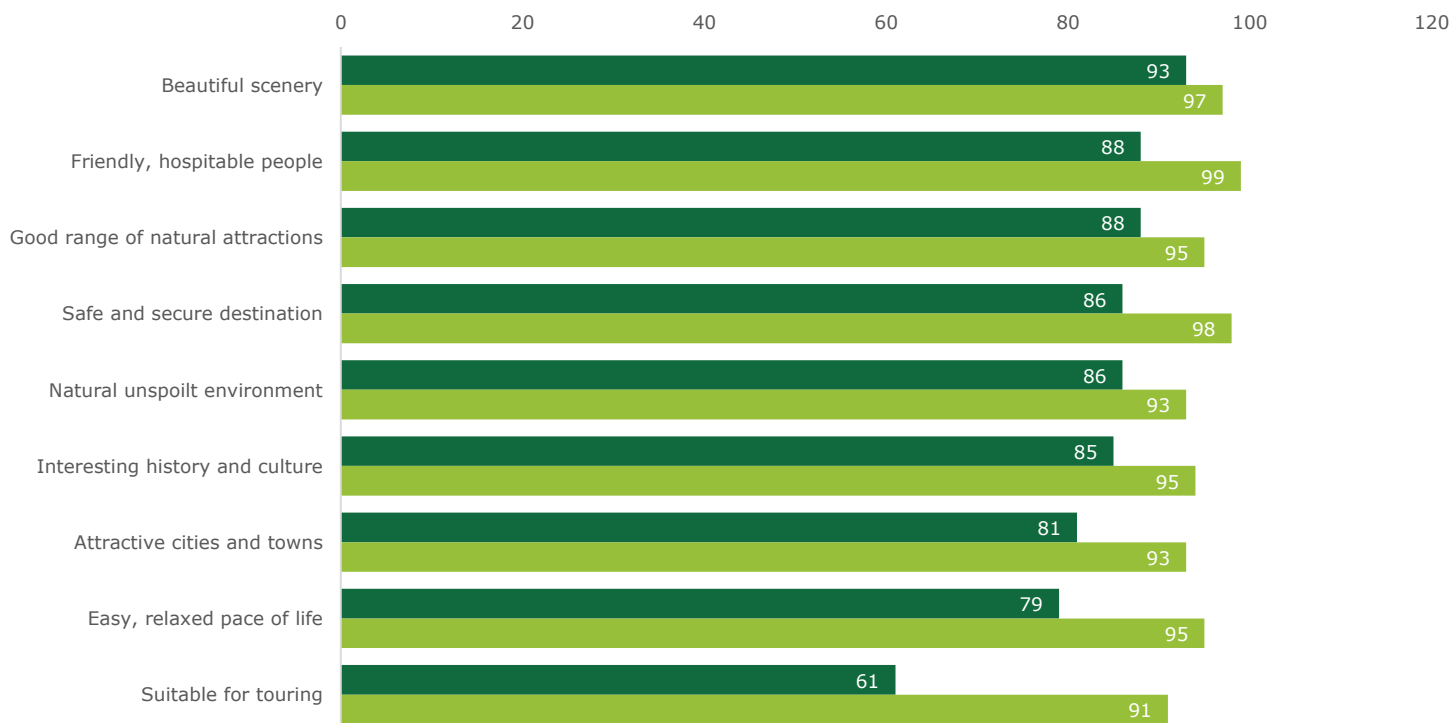
Overseas Holidaymakers 2018⁹

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

Experience of Ireland		Use of Car		Age		Social Class		Party Competition	
First Visit	67	Car Brought	10	Under 25 years	22	Mgr/Prof (AB)	28	Alone	21
Repeat	31	Car Hired	33	25-34 years	23	White Collar(C1)	60	Couple	40
Irish Born	1	Car Not Used	57	35-44 years	12	Skilled Worker (C2)	9	Family	18
				45+ years	44	Unskilled Worker (DE)	3	Other Adult Group	22

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 2018



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



Domestic Tourism in 2018¹⁰

Domestic trips (000s) by purpose of travel		2014	2015	2016	2017	2018
	Holiday trips	4,436	4,658	4,870	4,886	5,323
	- Long (4+ nights)	1,144	1,078	1,144	962	998
	- Short (1-3 nights)	3,292	3,580	3,726	3,924	4,326
	Visiting friends/relatives trips	2,918	2,921	3,045	3,096	3,759
	Business trips	453	407	431	426	473
	Other trips	1,184	1,138	1,014	1,218	1,364
	TOTAL TRIPS	8,991	9,125	9,359	9,626	10,919

Source: CSO Household Travel Surveys 2014-2018

Domestic expenditure (€mn) by purpose of travel		2014	2015	2016	2017	2018
	Holiday trips	992.8	1,070.4	1,135.8	1,129.2	1,232.6
	- Long (4+ nights)	385.6	394.2	420.7	349.5	392.4
	- Short (1-3 nights)	607.1	676.2	715.0	779.7	840.2
	Visiting friends/relatives trips	327.0	296.5	297.0	353.1	352.9
	Business trips	110.3	98.0	106.3	123.3	116.9
	Other trips	283.4	260.4	258.6	273.4	303.6
	TOTAL TRIPS	1,713.5	1,725.3	1,797.7	1,879.1	2,006.0

Source: CSO Household Travel Surveys 2014-2018

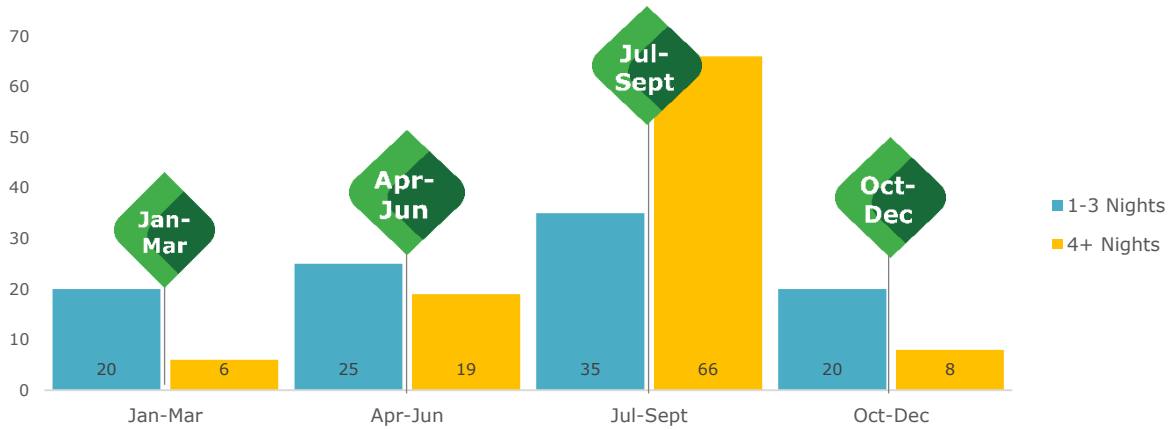
Accommodation bednights domestic holidaymakers (%)		2014	2015	2016	2017	2018
	Hotels	34	35	36	37	37
	Guesthouse/B&Bs	4	4	4	4	3
	Caravan/camping	14	7	13	14	10
	Self-catering	23	22	20	20	19
	Holiday home	12	19	13	11	21
	Friends/relatives	13	10	13	11	9
	Other	1	3	2	2	1

Source: CSO Household Travel Surveys 2014-2018

10. 2014-2015 domestic data revised due to new methodological approach by CSO, August 2016



Seasonality of holidaymakers (%) 2018 by length of stay



Source: CSO Household Travel Survey 2018

Activities engaged in by domestic holidaymakers (%)



26%
Hiking/
walking



21%
National
parks



21%
Houses/
castles



20%
Watersports
(excluding
swimming)



17%
Visits to
spas



17%
Attending
a festival/
event



17%
Gardens



15%
Heritage/
interpretive
centres



12%
Monuments



11%
Museums/
art galleries



9%
Attending a
sporting
event



8%
Cycling



5%
Golf



2%
Attending
Horse Racing



2%
Angling



Source: Fáilte Ireland Domestic Omnibus 2018



Accommodation in 2018

Premises			Rooms	Room Occupancy %
	807	Hotels	58,009	72
	170	Guesthouses	2,199	66
	1,015	Bed and Breakfasts	4,324	45
	88	Hostels	7,135	70
	250	Welcome Standard ¹¹	9,726	n/a
Units/Pitches			Beds	Bed Occupancy %
	2,373	Self-Catering (units)	12,036	38
	6,553	Caravan & camping (pitches)	30,292	38

Source: Capita

Source: Fáilte Ireland Accommodation Survey

Attendance at popular visitor attractions in Ireland 2018

Top Fee-Charging Attractions

Top Free Attractions

Name of Attraction	County	Visits	Name of Attraction	County	Visits
Guinness Storehouse	Dublin	1,736,156	Kilkenny Parklands	Kilkenny	799,032
Cliffs of Moher Visitor Experience	Clare	1,580,000	National Gallery of Ireland	Dublin	775,491
Dublin Zoo	Dublin	1,230,145	Glendalough site	Wicklow	732,824
Book of Kells	Dublin	1,057,642	National Botanic Gardens	Dublin	655,609
Tayto Park	Meath	700,000	Castletown House Parklands	Kildare	642,278
St Patrick's Cathedral	Dublin	627,199	Irish Museum of Modern Art	Dublin	505,891
Kylemore Abbey & Gardens	Galway	561,657	Doneraile Park	Cork	490,000
Muckross House	Kerry	550,649	National Museum of Ireland - Archaeology	Dublin	466,038
Powerscourt House, Gardens & Waterfall	Wicklow	472,523	Farmleigh House & Estate	Dublin	389,932
Blarney Castle & Gardens	Cork	460,000	Science Gallery at Trinity College Dublin	Dublin	380,000

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

