

TOURISM FACTS 2014 PRELIMINARY

May 2015

Tourism Numbers 2009 – 2014(p)

Where did Ireland's tourists come from?

Numbers (000s)	2009 ¹	2010 ²	2011 ³	2012	2013	2014(p)
Britain	3,034	2,759	2,799	2,722	2,870	3,018
Mainland Europe	2,323	2,011	2,184	2,247	2,346	2,496
France	393	344	381	384	409	422
Germany	411	381	411	437	466	539
Italy	274	214	214	240	226	248
Spain	255	214	233	239	249	274
Netherlands	n/a	120	133	137	148	149
Belgium	n/a	65	83	82	95	100
Denmark	n/a	43	46	42	51	56
Sweden	n/a	53	57	70	72	61
Switzerland	n/a	54	68	78	73	84
Austria	n/a	41	44	46	51	56
Norway	n/a	45	51	48	50	50
Poland	n/a	166	161	159	152	141
All Other Europe	n/a	270	302	284	306	318
North America	920	864	904	940	1,039	1,148
USA	835	780	811	833	924	1,010
Canada	85	83	93	107	115	138
Rest of World	301	311	353	378	431	462
Australia, New Zealand & Other Oceania	130	135	143	158	192	185
Other Areas	171	176	209	219	240	277
Total Overseas	6,578	5,945	6,240	6,286	6,686	7,124
Northern Ireland	n/a	n/a	1,416	1,264	1,574	n/a
Total out-of-state	n/a	n/a	7,656	7,550	8,260	n/a
Domestic trips ⁴	8,340	7,300	7,169	7,031	7,111	7,354

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 March 2012

² Revised February 2014

³ Revised by CSO in 2013

⁴ 2010 and 2011 revised by CSO in 2013

Tourism Revenue 2009 – 2014(p)

How much money did they spend?

Revenue (€m)	2009 ⁵	2010	2011 ⁶	2012	2013 ⁷	2014(p)
Britain	1,035.8	879.4	858.3	857.9	890.9	924.9
Mainland Europe	1,348.0	1,133.9	1,110.8	1,060.5	1,228.2	1,298.2
North America	724.6	695.1	677.4	745.7	829.0	943.0
Other Overseas	311.3	290.4	272.8	291.6	367.7	429.7
TOTAL OVERSEAS	3,419.7	2,998.8	2,919.4	2,955.8	3,315.7	3,595.7
Northern Ireland ⁸	n/a	n/a	295.8	284.3	304.7	n/a
TOTAL OUT-OF-STATE	n/a	n/a	3,215.2	3,240.1	3,620.4	n/a
Carrier receipts ⁹	524.0	580.0	626.0	856.0	977.0	1,130.0
Overseas same-day visits	27.0	25.0	36.0	34.0	35.0	41.0
TOTAL FOREIGN EXCHANGE EARNINGS¹⁰	n/a	n/a	3,877.2	4,041.1	4,632.4	n/a
Domestic trips ¹¹	1,389.8	1,560.5	1,415.9	1,345.4	1,373.3	1,464.0
TOTAL TOURISM REVENUE	5,360.5	5,164.3	5,293.1	5,386.5	6,005.7	n/a

Source surveys are designed to measure area of residence groupings (bold figures).

Northern Ireland resident expenditure data provided in StE from 2009 onwards, average annual exchange rates supplied by Central Bank of Ireland.

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

Revenue – some useful figures

Per diems – spend per person per day

Overseas visitors	€63
Overseas holidaymakers	€82
Domestic overnight trips	€67
Domestic day trips	€40

For every euro spent on tourism (domestic and overseas), 24.5c is generated in tax.

Employment – some useful figures

Every €1mn of tourist expenditure helps to support 34 tourism jobs.

Every 55 international tourists help support one tourism job.

1,000 additional tourists support 18 jobs in the tourism industry.

⁵ Revised March 2012

⁶ Revised by CSO in 2013

⁷ Revised March 2014

⁸ Source: NISRA GBP: Euro exchange rates 2011 – 0.86788, 2012 – 0.81087 Source: Central Bank of Ireland

⁹ 2012 carrier receipts revised March 2014

¹⁰ Foreign exchange earnings in 2009 and 2010 exclude revenue from Northern Ireland visitors

¹¹ 2010 and 2011 revised by CSO in 2013

Overseas Tourists in 2014

How did overseas tourists spend their money in Ireland?(p)

Breakdown of Spend in Ireland (%)	Total	Britain	Mainland Europe	North America	Rest of World
Bed & board	31	27	33	32	30
Other food & drink	34	40	32	32	32
Sightseeing/entertainment	7	6	7	8	8
Internal transport	13	13	12	13	12
Shopping	14	12	14	13	16
Miscellaneous	2	2	2	2	2

When did they arrive? (p)

Seasonality (%)	Total	Britain	Mainland Europe	North America	Rest of World
January-March	18	20	17	13	17
April	8	9	9	6	7
May	10	9	10	11	9
June	10	8	10	13	10
July	11	9	11	13	14
August	12	11	12	13	12
September	9	9	9	11	9
October-December	22	24	21	20	22

Source: Fáilte Ireland estimates based on CSO

How did they arrive/depart? (p)

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Air					
From Britain	39	72	5	22	59
From Mainland Europe	35	1	86	16	28
Transatlantic	11	1	1	57	2
Sea					
From Britain	10	19	4	3	7
From Mainland Europe	1	-	3	-	-
Via N. Ireland (2013 figures used in calculation)	4	8	1	2	4

Source: CSO (* indicates less than 0.5 percent)

Where did they stay? (distribution of bednights) (p)

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Hotels	46	43	42	60	46
Guesthouses/B&Bs	13	6	14	22	18
Self-catering	8	5	9	11	13
Caravan & camping	1	1	2	*	*
Hostels	6	1	9	9	11
Friends/relatives	36	47	31	23	35
Other	3	5	2	2	1
Nights (Million) preliminary	56.3	15.6	24.1	10.0	6.7

Source: SOT

Source (CSO)

(* indicates less than 0.5 percent)

What was their main reason for visiting Ireland? (p)

(000s)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	3,398	1,057	1,315	805	219
Visit friends/relatives	2,292	1,369	572	197	153
Business	1,112	540	413	99	60
Other	322	52	196	46	28

Source: CSO and NISRA

Overseas Holidaymakers 2014

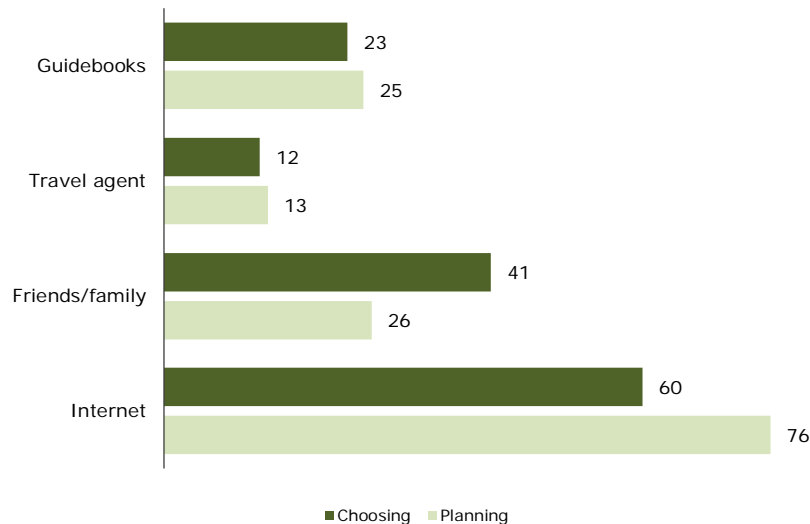
Holidaymakers in this section are defined as visitors who stated that their primary purpose for visiting Ireland was a holiday.

What was the total number of holidaymakers in 2014? (p)

Holidaymakers (000s)	2009	2010	2011	2012	2013	2014
Britain	953	896	961	941	983	1,057
Mainland Europe	1,090	971	1,041	1,120	1,229	1,315
North America	567	546	591	634	716	805
Rest of World	158	137	167	184	215	219
Total	2,769	2,549	2,760	2,879	3,137	3,398

Source: CSO and NISRA

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



Source: Fáilte Ireland's Post Survey of Holidaymakers 2014

How did they arrange their holiday?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Package*	22	17	17	31	21
Independent	78	83	83	69	79

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

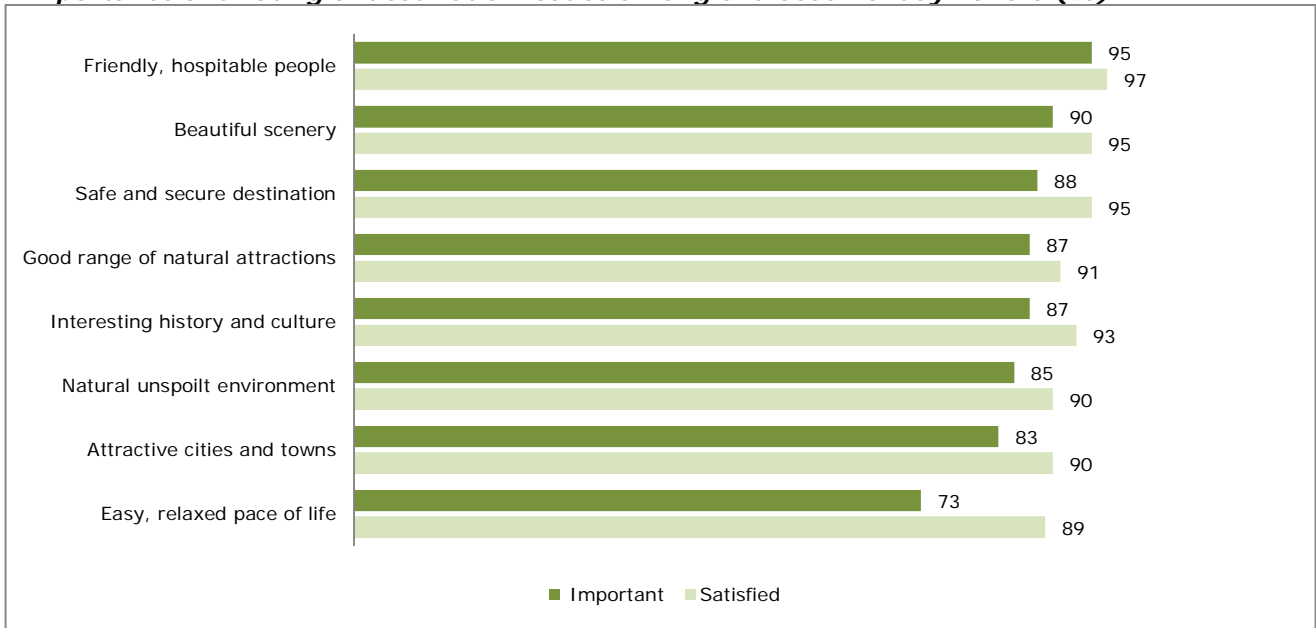
Source: Fáilte Ireland's Survey of Overseas Travellers

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

Experience of Ireland	Use of car	Age	Social class	Party composition
First visit	Car brought 11	Under 25 years 6	Managerial/professional (AB) 30	Alone 21
Repeat	Car hired 33	25-34 years 34	White collar (C1) 53	Couple 42
Irish-born	Car not used 56	35-44 years 12	Skilled worker (C2) 14	Family 17
		45+ years 48	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 Post Survey of Overseas Holidaymakers 2014

What are Holidaymaker Segments ?

Part of Fáilte Ireland's development agenda is aimed at specific target segments, which have been identified as Ireland's best prospects for growing tourism in its main overseas markets. The three priority segments are described below.

Social Energisers



Travellers with a passion for new "wow" experiences, who are seeking fun and excitement, immersing themselves in the destination

Independent thinkers with a craving for culture and history. They are out to broaden their minds and expand their experiences by exploring new landscapes, history and culture

Culturally Curious



Adventurous and committed to spending quality time in a breath-taking place. They are on holiday to take time out, get physical with nature and reconnect with their partner.

Great Escapers



What was the size (%) of these segments in our four key markets in 2014?



■ Social Energisers

■ Culturally Curious

■ Great Escapers

Domestic Tourism in 2014¹²

Domestic trips (000s) by purpose of travel

	2009	2010	2011	2012	2013	2014
Holiday trips	4,037	3,978	3,696	3,374	3,460	3,583
- Long (4+ nights)	1,104	1,151	1,040	780	920	913
- Short (1-3 nights)	2,933	2,828	2,656	2,594	2,541	2,670
Visiting friends/relatives trips	2,712	1,997	2,231	2,374	2,452	2,423
Business trips	600	370	350	322	341	402
Other trips	990	955	891	960	858	947
Total trips	8,340	7,300	7,169	7,031	7,111	7,354

Source: CSO Household Travel Surveys 2009-2014

Domestic expenditure (€m) by purpose of travel

	2009	2010	2011	2012	2013	2014
Holiday trips	843.3	971.9	864.9	784.8	840.3	852.0
- Long (4+ nights)	372.5	394.2	348.6	290.9	348.0	328.5
- Short (1-3 nights)	470.8	577.7	516.3	493.9	492.2	523.5
Visiting friends/relatives trips	171.1	270.5	265.9	269.6	266.7	302.2
Business trips	136.2	85.9	76.9	75.7	78.4	98.3
Other trips	239.2	232.2	208.2	215.3	187.9	211.5
Total expenditure	1,389.8	1,560.5	1,415.9	1,345.4	1,373.3	1,464.0

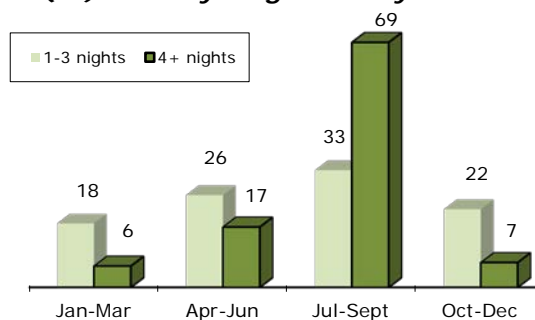
Source: CSO Household Travel Surveys 2009-2014

Accommodation bednights domestic holidaymakers (%)

	2009	2010	2011	2012	2013	2014
Hotels	36	32	32	39	36	36
Guesthouse/B&Bs	3	3	3	4	3	4
Caravan/camping	10	17	13	11	14	13
Self-catering	18	17	20	18	20	21
Holiday home	20	19	20	13	16	14
Friends/relatives	13	10	9	13	10	11
Other	2	2	2	2	2	1

Source: CSO Household Travel Surveys 2009-2014

Seasonality of holidaymakers (%) 2014 by length of stay



Source: CSO Household Travel Survey 2014

¹² 2010 – please note there is a discontinuity in domestic tourism figures between 2010 and previous years due to changes in methodology. Also 2010 and 2011 were revised in July 2013.

Activities engaged in by domestic holidaymakers (%)

Hiking/walking	22
Houses/castles	20
Visits to spas	19
National parks	18
Watersports	18
Gardens	16
Heritage/ interpretive centres	15
Museums/art galleries	11
Cycling	8
Golf	6
Angling	2
Attending horse racing	2
Equestrian pursuits	2

Source: Fáilte Ireland Domestic Omnibus 2014

The Tourism Product

Accommodation in 2014

	Premises	Rooms
Hotels	811	56,736
Guesthouses	235	2,924
Bed and Breakfast*	1,394	5,859
Self-Catering (group scheme only - units)	2,968	n/a
Hostels (beds)	114	8,214
Caravan & camping (pitches)	92	5,252

Source South Western

* includes specialist and pub accommodation

Accommodation occupancy in 2014

	%
Hotel Room Occupancy	64
Guesthouse Room Occupancy	60
B&Bs Room Occupancy	40
Hostels Bed Occupancy	57
Group Scheme Self-Catering Unit Occupancy	45

Source: Fáilte Ireland Occupancy Surveys

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), Fáilte Ireland's Survey of Overseas Travellers (SOT), Visitor Attitudes Survey, Hotel Survey, Accommodation Occupancy Survey and Domestic Omnibus Survey.

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