



ISLAND OF IRELAND OVERSEAS TOURISM PERFORMANCE

Tourism Ireland
Marketing the Island of Ireland overseas

2016 FACTS & FIGURES



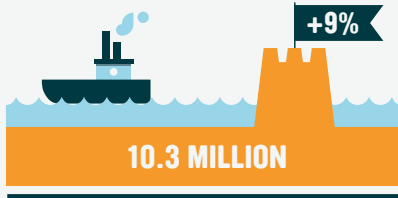
AN EXTRA +834,000 VISITORS PLUS
+€446m/£360m SPEND

RECORD
10.3 MILLION
VISITORS

€5.3b/£4.3b
HIGHEST EVER
OVERSEAS REVENUE

OVERSEAS VISITORS

Over 10.3 million visitors were welcomed to the island of Ireland in 2016, almost a million (+834k) more than in 2015 [+9% increase].



WHERE DID THEY COME FROM?

GB [47%], US [13%], Germany [6%] & France [5%] represented almost three-quarters of all overseas visitors to the island in 2016.



AVERAGE SPEND AND LENGTH OF STAY

The average spend per overseas visitor was €515/£416 in 2016. The average length of stay for visitors was 7.6 nights and holidaymakers was 6.6 nights.



GREAT BRITAIN



NORTH AMERICA



MAINLAND EUROPE



OTHER AREAS

WHY WERE OUR VISITORS HERE?

Almost half of the (46%) visitors to the island of Ireland in 2016 came for a holiday, that is +416,000 (+10%) more holidaymakers than in 2015. Approximately one-third (35%) came to visit friends and/or relatives (VFR) while almost one-sixth (16%) came for business reasons.



HOLIDAY

46%



VFR

35%



BUSINESS

16%



OTHER

4%

PROMOTABLE VISITORS*

More than 5 million promotable visitors were welcomed to the island in 2016, +425,000 more than in 2015.

+9%



OVERSEAS REVENUE

The island of Ireland generated €5.3/£4.3 billion in 2016, an additional +€446/£360 million compared to 2015.



WHERE DID THE REVENUE COME FROM?

GB [28%], US [23%], Germany [8%] & France [5%] represent two-thirds of all overseas revenue generated on the island in 2016.

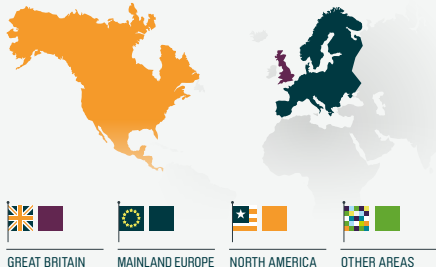


POPULAR PLACES?

Dublin, Northern Ireland and the South West remain the most popular destinations for visitors.



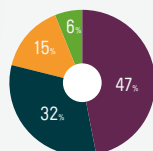
2016 NUMBERS & MARKET AREA SHARE



VISITORS

10,319,000

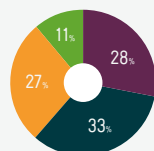
+9%
Change vs 2015



REVENUE

€5,311 million
£4,288 million

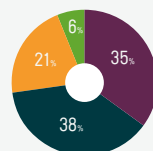
+9%
Change vs 2015



PROMOTABLES*

5,161,000

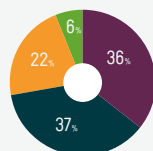
+9%
Change vs 2015



HOLIDAYMAKERS

4,736,000

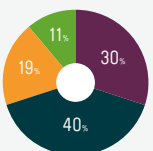
+10%
Change vs 2015



NIGHTS

78,290,000

+8%
Change vs 2015



* Promotable visitors are made up of holidaymakers, conference, trade fair/exhibition visitors and visitors here for English Language Training (ELT).

“After 6 years of consecutive growth, 2016 was a record year with 10.3 million overseas visitors welcomed to the island of Ireland.”

WHERE DO OUR VISITORS COME FROM?

After 6 years of consecutive growth, 2016 was a record year with 10.3 million overseas visitors welcomed to the island of Ireland. An additional 834,000 visitors when compared to 2015. Over half a million (556,000 or 5.5%) overnighed on both sides of the border.

Our Top Markets

Britain, the US, France and Germany are the top four inbound markets to the island of Ireland. They account for 72% of visitors, 70% of holidaymakers, 65% of revenue and 60% of nights.

Diversification

As we continue to diversify into other markets, the proportion of visitors from these four markets has been trending down. The top four accounted for 77% of all visits in 2006, while in 2003 it was 83%.

Long-haul

Three long-haul markets, the US, Canada and Australia, feature in our top 10 source markets.

Fastest Growing

Britain and the US were the fastest growing markets in volume terms in 2016. Combined they account for two-thirds (+538k) of all additional (+834k) visitors in 2016.

In percentage terms, the Netherlands (+26%), Spain (+15%), the US (+14%) and some developing markets including South Africa, China and India recorded greatest year-on-year % growth.

“A record 4.7m overseas visitors came for a holiday in 2016, that is almost half (46%) of all visitors and 53% of revenue”

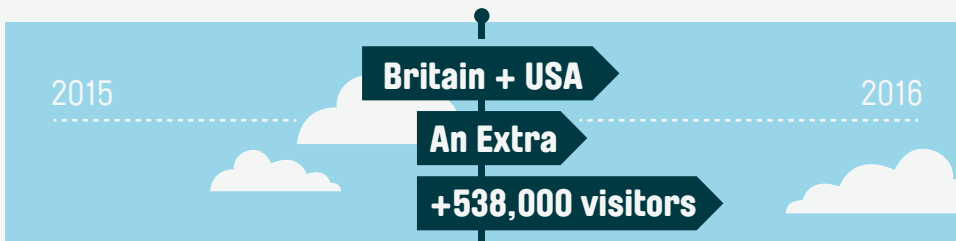


WHY WERE OUR VISITORS HERE?

A record 4.7 million overseas visitors came for a holiday in 2016, that is almost half (46%) of all visitors and generated 53% of revenue. This compares with the 2.7m overseas holidaymakers recorded in 2010, when holidaymakers only accounted for 39% of all visitors and 58% of revenue.

Visiting Friends & Relatives (VFR)

By contrast, VFR trips account for a third (35%) of the island of Ireland's overseas visitors to and nights (32%) but only a quarter of all spend (23%). Northern Ireland continues to rely more heavily on those visiting friends and relatives (52%), particularly in terms of nights (60%).



WHERE DO OUR VISITORS COME FROM? (000's)

	Island of Ireland			Republic of Ireland			Northern Ireland		
	2016	vs. 2015	Share	2016	vs. 2015	Share	2016	vs. 2015	Share
Total	10,319	+9%		8,742	+9%		2,133	+9%	
	4,863	+8%	47%	3,632	+9%	42%	1,389	+7%	65%
	3,282	+8%	32%	3,102	+8%	35%	358	+15%	17%
GERMANY	651	+3%	6%	624	+3%	7%	69	+7%	3%
FRANCE	524	+6%	5%	494	+5%	6%	62	+10%	3%
SPAIN	391	+15%	4%	370	+15%	4%	42	+18%	2%
ITALY	336	+8%	3%	326	+7%	4%	27	+23%	1%
	1,569	+13%	15%	1,477	+14%	17%	250	+9%	12%
USA	1,366	+14%	13%	1,294	+15%	15%	196	+8%	9%
CANADA	203	+11%	2%	183	+11%	2%	54	+12%	3%
	604	+4%	6%	531	+3%	6%	135	+4%	6%
AUS / NZ / 0o* Other Oceania	227	+2%	2%	206	+1%	2%	61	+6%	3%

	Holiday	VFR*	Business	Other
Total	46%	35%	16%	4%
	35%	46%	17%	1%
	53%	24%	16%	7%
	67%	19%	9%	4%
	43%	37%	14%	6%

VFR* – Visiting friends and relatives

HOW MUCH DID OUR VISITORS SPEND?



	Island of Ireland				Republic of Ireland				Northern Ireland			
	2016 €m	2016 £m	vs. 2015	Share	2016 €m	2016 £m	vs. 2015	Share	2016 €m	2016 £m	vs. 2015	Share
Total	5,311	4,288	+9%		4,638	3,745	+9%		673	543	+12%	
	1,501	1,212	+11%	28%	1,110	896	+9%	24%	391	316	+15%	58%
	1,773	1,432	+6%	33%	1,657	1,338	+7%	36%	116	93	+1%	17%
	1,441	1,164	+12%	27%	1,337	1,080	+11%	29%	104	84	+16%	15%
	595	481	+9%	11%	533	431	+8%	11%	62	50	+12%	9%

HOW DOES PURPOSE OF VISIT CONTRIBUTE TO SPEND?

More than half (53%) of all overseas revenue on the Island of Ireland in 2016 is generated from those who come for a holiday. Holidaymakers from North America account for 70% of all revenue from that market.



VFR* – Visiting friends and relatives

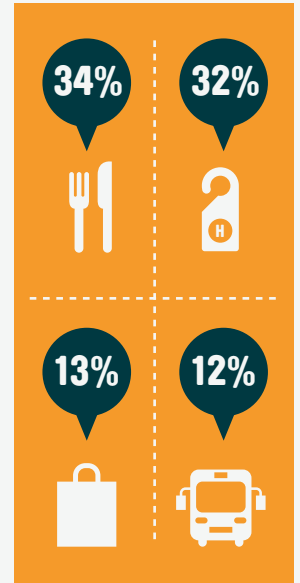
	Holiday	VFR*	Business	Other
Total	53%	23%	16%	8%
	39%	36%	23%	2%
	55%	15%	16%	14%
	70%	14%	9%	7%
	38%	31%	18%	13%

SS/Ents* – Sightseeing & Entertainment

	Bed & Board	Food & Drink	SS/Ents*	Internal Transport	Shopping	Misc
Total	32%	34%	6%	12%	13%	3%
	27%	37%	6%	11%	13%	5%
	34%	32%	7%	12%	13%	3%
	33%	32%	6%	13%	14%	3%
	32%	32%	7%	11%	15%	4%

HOW DID THEY SPEND THEIR MONEY?

The overseas revenue generated on the island of Ireland reached record levels €5.3/£4.3 billion, breaking the 2015 record. This is the second record year in a row for both Northern Ireland and the Republic of Ireland.



HOW MANY NIGHTS DID THEY STAY?

A record 78.3 million overseas bednights were recorded in 2016, that is a +20% increase in the last 10 years.

Quarter 3 (July–September) remains the busiest quarter, especially in terms of holiday nights. Greatest volume growth in bednights was recorded in Q3 in 2016. All accommodation types benefitted from this growth with the exception of Hotels which recorded a slight decline in Q3. The average length of stay of 7.6 nights remains unchanged since last year, but is down from a peak of 8.3 nights in 2010.

Those travelling further tend to stay longer (other areas visitors stay on average 14.9 nights compared to GB visitors who stay on average 4.8 nights). This is true across all visitor types.

Average length of stay is inflated by those here for reasons other than holidaying (6.6 nights), visiting friends and/ relatives (7.1 nights) and business reasons (6.3 nights). These 'other' reasons have an average stay of 28.0 nights and include those who come to learn English as a foreign language (English language training).

“A record 78.3m overseas bed nights were recorded in 2016, that is a +20% increase in the last 10 years.”



	2016 ('000's)	vs. 2015	Share
Total	78,290	+8%	
	23,349	+7%	30%
	31,288	+9%	40%
	14,652	+10%	19%
	9,001	+6%	11%

WHERE DID THEY STAY?

	Friends/Relatives	Hotel	Rented	B&B/Guesthouse	Other
Total	30%	27%	14%	11%	18%
	47%	26%	8%	6%	14%
	21%	25%	18%	14%	23%
	18%	40%	13%	15%	14%
	35%	19%	23%	8%	15%

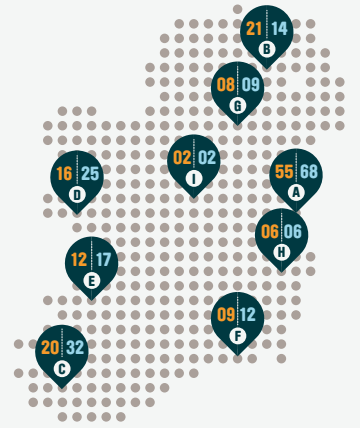


WHERE ON THE ISLAND OF IRELAND DID OUR VISITORS & HOLIDAYMAKERS STAY?

Overseas visitors included on average 1.5 regions on average in their trip in 2016, while holidaymakers included 1.9 regions. This reflects a decline among visitors from 10 years ago when the average regions visited was 1.9 for both visitors and holidaymakers.

	A	B	C	D	E	F	G	H	I
	Dublin	Northern Ireland	South West	West	Mid West	South East	Border	Mid East	Midlands
Visitors (000's)	5,687	2,133	2,079	1,675	1,215	946	815	626	226
Share	55%	21%	20%	16%	12%	9%	8%	6%	2%
Holidays (000's)	3,238	684	1,492	1,176	802	577	429	266	73
	68%	14%	32%	25%	17%	12%	9%	6%	2%

Dublin: Dublin City & County **Northern Ireland:** Antrim, Armagh, Down, Fermanagh, Derry/Londonderry, Tyrone **South West:** Cork, Kerry **West:** Galway, Mayo, Roscommon **Mid East:** Kildare, Meath, Wicklow **South East:** Carlow, Kilkenny, Tipperary (South), Waterford, Wexford **Border:** Cavan, Donegal, Leitrim, Monaghan, Sligo, Louth **Mid West:** Clare, Limerick, Tipperary (North) **Midlands:** Laois, Longford, Offaly, Westmeath.



% HOLIDAYMAKERS % VISITORS

WHERE DID OUR HOLIDAYMAKERS COME FROM?

Mainland Europe and Britain each contribute over a third of all holidaymakers to the island of Ireland. A fifth of holidaymakers come from North America with the remainder coming from other areas. The island of Ireland's dependence on Britain as our main source market for holidaymakers has reduced from 48% in 2006 to 36% in 2016.

	2016 (000's)	vs. 2015	Share
Total	4,736	+10%	
	1,683	+14%	36%
	1,738	+6%	37%
	1,052	+12%	22%
	263	-1%	6%

WHERE DID OUR PROMOTABLE VISITORS* COME FROM?

Given that holidaymakers make up the majority (92%) of promotable visitors, it is not surprising that the share by market area mirrors to a great extent that of holidaymakers. However, more than half (55%) of the additional 425k promotable business visitors and English Language Training visitors come from Mainland Europe as reflected in Mainland Europe's marginally greater share of promotable visitors (38%).



*Promotable visitors are made up of holidaymakers, conference, trade fair/exhibition visitors and visitors here for English Language Training (ELT).

	2016 (000's)	vs. 2015	Share
Total	5,161	+9%	
	1,804	+13%	35%
	1,970	+6%	38%
	1,083	+12%	21%
	304	-0%	6%

HOLIDAYMAKER PROFILES

WHAT SOCIO ECONOMIC GROUP DO OUR HOLIDAYMAKERS BELONG TO?

The island of Ireland continues to attract a high proportion of white collar/managerial/professional (ABC1) holidaymakers (86%), (less so from Britain (77%)). However, the make-up of these ABC1's has changed with a greater proportion of AB's than a decade ago (30% in 2016 vs. 27% in 2006). This can be observed across in all main market areas except North America where the opposite is the case (27% in 2016 vs. 34% in 2006).

WHITE COLLAR
57%



	AB Managerial Professional	C1 White Collar	C2 Skilled Worker	DE Unskilled Worker
Total	30%	57%	10%	3%
	29%	48%	17%	5%
	32%	59%	7%	2%
	27%	61%	9%	3%
	35%	55%	8%	2%

HOW LONG DID OUR HOLIDAYMAKERS STAY?

The average length of stay has reduced marginally over the last couple of years from 6.8 nights in 2014, 6.7 nights in 2015 to 6.6 nights in 2016.

The popularity of short breaks has grown considerably in the past decade with half of all British holidaymakers staying for a short break (51% staying 1-3 nights). This is a significant increase from 10 years ago where 41% of British holidaymakers came for a stay of 1-3 nights. This trend is also observed in other market areas though particularly in North America and Other Areas where there has also been an increase in the proportion staying for 4-5 nights.

	1-3 nights	4-5 nights	6-8 nights	9-14 nights	15+ nights	Average nights
Total	32%	20%	27%	16%	5%	6.6
	51%	18%	17%	11%	3%	4.5
	20%	20%	34%	20%	6%	7.4
	26%	22%	29%	17%	6%	7.9
	25%	28%	28%	13%	6%	7.7

WHAT AGE ARE OUR HOLIDAYMAKERS?

More than half (55%) of all holidaymakers are 35 years of age or older, this is true in all market areas except in North America where just under half are 35+ years.



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

It was a first visit to the island of Ireland for almost two-thirds (63%) of holidaymakers in 2016, this reflects a significantly higher proportion than a decade ago (56%). All main market areas has seen an increase in these first-time visitors, with the exception of North America.



	U16	16-24	25-34	35-44	45-54	55-64	65+
Total	4%	17%	24%	14%	17%	15%	9%
	4%	15%	22%	15%	19%	13%	11%
	2%	17%	23%	13%	13%	19%	13%
	5%	20%	26%	14%	17%	12%	5%
	3%	15%	28%	12%	11%	18%	14%

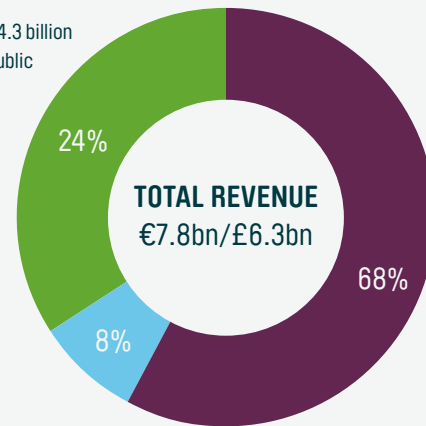
	1st visit	Repeat	Born here
Total	63%	34%	3%
	42%	53%	5%
	80%	19%	1%
	69%	31%	0%
	83%	15%	2%

TOURISM CONTEXT

TOTAL TOURISM ON THE ISLAND OF IRELAND

Total tourism on the island of Ireland generated €7.8/£6.3 billion in 2016. In addition to the €5.3/£4.3 billion generated by overseas visitors, a further €1.9/£1.5 billion was generated by residents of the Republic of Ireland, with the balance (€661/£538 billion) coming from Northern Ireland residents.

“Overseas visitors continue to grow in importance for the island of Ireland (North and South), accounting for 44% of all trips, 68% of spend and 70% of nights.”



OVERSEAS RESIDENTS

10.3m Trips

€5.3/£4.3bn (68%)

NORTHERN IRELAND RESIDENTS

3.3m Trips

€661/£538m (8%)

REPUBLIC OF IRELAND RESIDENTS

9.7m Trips

€1.9/£1.5bn (24%)

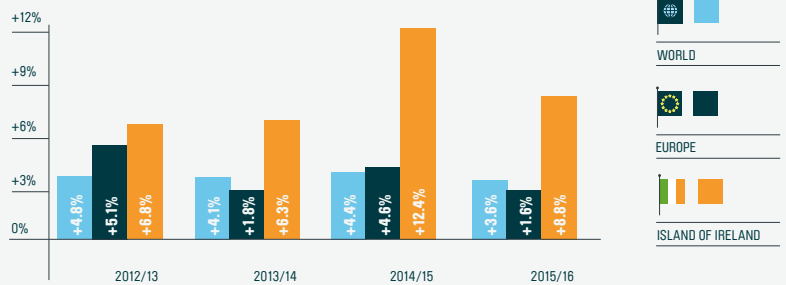
GLOBAL TOURISM TRENDS

Overseas visitors to the island of Ireland has grown by +8.8% in 2016, faster than both the World (+3.6%) and Europe (+1.6%), for a fourth year in a row. The island of Ireland's share of the World and Europe's holidaymakers has grown consistently over the last 5 years.

At the same time Europe's share of World (overnight) arrivals has declined by over 10% in the past 10 years (from 54.6% in 2006 to 48.8% in 2016) as growth in Asia and the Pacific has outpaced that of Europe.

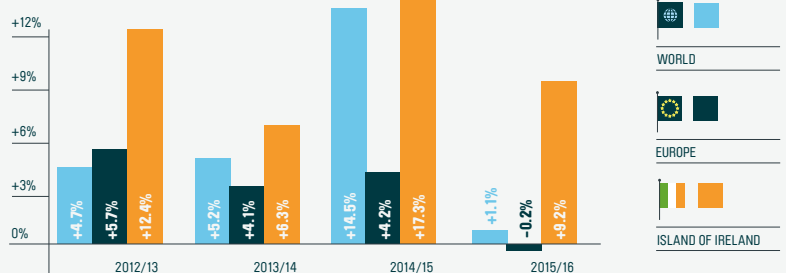


WORLD/EUROPE/ISLAND OF IRELAND TOURISTS: YEAR-ON-YEAR % CHANGE



Source: Oxford Economics

WORLD/EUROPE/ISLAND OF IRELAND REVENUE: YEAR-ON-YEAR % CHANGE



Exchange rates used to determine spending in euros varies over time, and is not equal to the exchange rate used in the Tourism Ireland Model[†]
Source: Oxford Economics

For further detail or copies of any of our research publications please visit our website: www.tourismireland.com



FURTHER INFORMATION...

Tourism Ireland is the organisation responsible for marketing the island of Ireland overseas as a tourist destination. In addition to this role Tourism Ireland also undertakes regional / product marketing and promotional activities on behalf of Fáilte Ireland and Tourism Northern Ireland through its overseas market offices.

*All the information contained within this publication is based on information provided by NISRA's Northern Ireland Passenger Survey, the CSO's Country of Residence Survey and the Passenger Card Inquiry and Fáilte Ireland's Survey of Overseas Travellers. We would like to thank NISRA, Fáilte Ireland, the CSO and Tourism Northern Ireland for their assistance to Tourism Ireland in compiling **Overseas Tourism Performance 2016**.*

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