

ISLAND OF IRELAND

OVERSEAS TOURISM PERFORMANCE

2018 FACTS & FIGURES

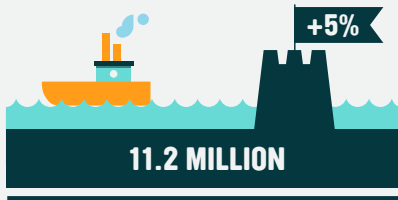
AN EXTRA +573,000
TOURISTS PLUS
+€287m/ £249m SPEND

BEST EVER YEAR
11.2 MILLION
OVERSEAS TOURISTS

RECORD
€5.9b/ £5.1b
REVENUE

OVERSEAS TOURISTS

Over 11.2 million tourists were welcomed on the island of Ireland in 2018, over +570k more than in 2017 [+5% increase].



WHERE DID THEY COME FROM?

GB [42%], US [16%], Germany [7%] & France [5%] represented seventy percent of all overseas tourists to the island in 2018.



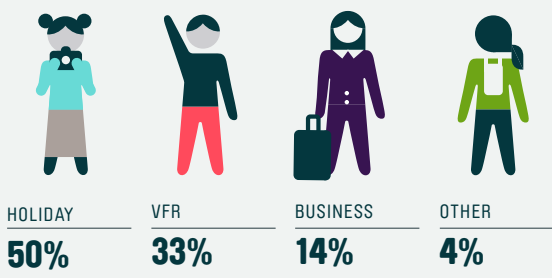
AVERAGE SPEND AND LENGTH OF STAY

The average spend per overseas tourist was €524 / £457 in 2018. The average length of stay for tourists was 7.4 nights and holidaymakers was 6.4 nights.



WHY WERE OUR TOURISTS HERE?

Half (50%) of all tourists to the island of Ireland in 2018 came for a holiday, that is +557,000 (+11%) more holidaymakers than in 2017. One-third (33%) came to visit friends and/or relatives (VFR) while almost one-seventh (14%) came for business reasons.



PROMOTABLE TOURISTS*

More than 6 million promotable tourists were welcomed to the island in 2018, +532,000 more than in 2017.

+10%



OVERSEAS REVENUE

The island of Ireland generated €5.9 / £5.1 billion in 2018.



WHERE DID THE REVENUE COME FROM?

US [28%], GB [24%], Germany [8%] & France [5%] represent almost two-thirds [65%] of all overseas revenue generated on the island in 2018.

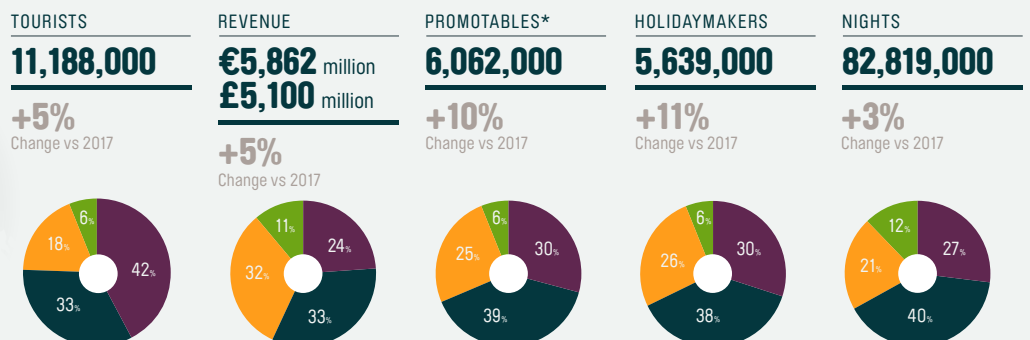
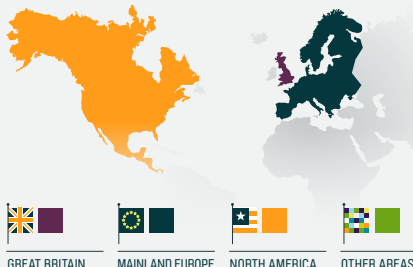


POPULAR PLACES?

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



2018 NUMBERS & MARKET AREA SHARE



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

“After 8 years of consecutive growth, 2018 was another record year with 11.2 million overseas tourists welcomed to the island of Ireland.”

WHERE DO OUR TOURISTS COME FROM?

2018 was the 4th consecutive record year with 11.2 million overseas tourists welcomed to the island of Ireland, and the 8th consecutive year of growth. Almost +575k more tourists than in 2017. 640,000 (or 5.7%) overnigheted on both sides of the border.

Our Top Markets

Britain, the US, Germany and France remain our top four inbound markets to the island of Ireland. They account for 70% of tourists, 69% of holidaymakers and holiday revenue, 65% of revenue and 60% of nights.

Diversification

As we continue to diversify into other markets, the share of tourists from these four markets has trended downwards over time. The top four accounted for 74% of all visits in 2008, while in 2003 it was 83%.

Long-haul

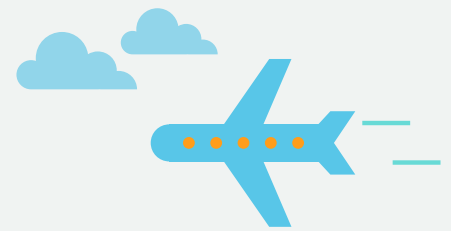
Three long-haul markets, the US, Canada and Australia, feature in our top 10 source markets.

Fastest Growing

The US (+228k), Germany (+116k), GB (+64k), Italy (+32k) and Switzerland (+20k) were the fastest growing markets in volume terms in 2018. Combined they account for around +460k additional tourists compared to 2017.

While Luxembourg (+53%), Brazil (+27%), Austria (+21%), Switzerland (+18%), Germany (+17%) and the US (+14%) were the fastest growing markets in terms of growth rate.

“A record 5.6m overseas tourists came for a holiday in 2018, that is half of all tourists and 58% of revenue”



WHY WERE OUR TOURISTS HERE?

Over 5.6 million overseas tourists came for a holiday in 2018, the 4th consecutive record year for holidaymakers to the island of Ireland. Holidays represent half of all tourists in 2018. This compares with the 2.9m overseas holidaymakers recorded in 2009, when holidaymakers only accounted for around a third (37%) of all tourists.

Visiting Friends & Relatives (VFR)

By contrast, VFR trips account for a third of the island of Ireland's overseas tourists (33%) and nights (31%) but one-fifth of all spend (20%). Northern Ireland continues to rely more heavily on those visiting friends and relatives (49%), particularly in terms of nights (58%) though less so in terms of revenue (41%).



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

	Island of Ireland			Republic of Ireland			Northern Ireland		
	2018	vs. 2017	Share	2018	vs. 2017	Share	2018	vs. 2017	Share
Total	11,188	+5%		9,609	+6%		2,218	+2%	
	4,748	+1%	42%	3,480	+1%	36%	1,425	+2%	64%
	3,668	+7%	33%	3,512	+8%	37%	333	-8%	15%
GERMANY	784	+17%	7%	763	+18%	8%	71	+7%	3%
FRANCE	547	+1%	5%	525	+2%	5%	54	-13%	2%
SPAIN	423	-3%	4%	404	-2%	4%	35	-24%	2%
ITALY	384	+9%	3%	376	+10%	4%	24	0%	1%
	2,048	+14%	18%	1,963	+14%	20%	303	+18%	14%
USA	1,804	+14%	16%	1,739	+15%	18%	237	+21%	11%
CANADA	244	+8%	2%	224	+10%	2%	66	+8%	3%
	723	+5%	6%	654	+8%	7%	158	0%	7%
AUS & NZ	251	+10%	2%	226	+9%	2%	72	+14%	3%

	Holiday	VFR*	Business	Other
Total	50%	33%	14%	4%
	35%	47%	16%	1%
	58%	22%	13%	6%
	72%	16%	7%	4%
	48%	35%	12%	6%

VFR* – Visiting friends and relatives

HOW MUCH DID OUR TOURISTS SPEND?



	Island of Ireland				Republic of Ireland				Northern Ireland			
	2018 €m	2018 £m	vs. 2017	Share	2018 €m	2018 £m	vs. 2017	Share	2018 €m	2018 £m	vs. 2017	Share
Total	5,862	5,100	+5%		5,217	4,539	+6%		644	561	-1%	
	1,401	1,219	-1%	24%	1,025	892	-2%	20%	376	327	+3%	58%
	1,941	1,688	+3%	33%	1,846	1,606	+5%	35%	95	82	-19%	15%
	1,852	1,611	+15%	32%	1,747	1,520	+15%	33%	105	91	+15%	16%
	668	581	+1%	11%	600	522	+2%	11%	68	59	-10%	11%

HOW DOES PURPOSE OF VISIT CONTRIBUTE TO SPEND?

Almost three-fifths (58%) of all overseas revenue on the Island of Ireland in 2018 is generated from those who came for a holiday. This varies by market with holidaymakers accounting for 75% of revenue North America, 59% of revenue from Mainland Europe, 43% from Other Areas and 40% of revenue from GB.

VFR* – Visiting friends and relatives

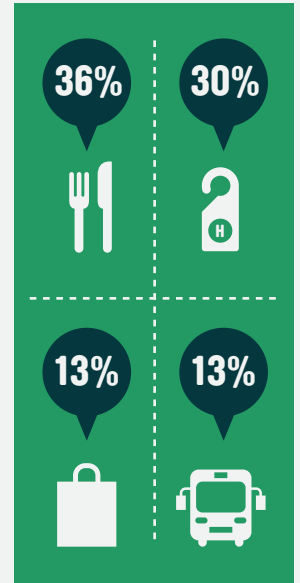
	Holiday	VFR*	Business	Other
Total	58%	20%	15%	7%
	40%	36%	23%	2%
	59%	13%	15%	12%
	75%	12%	9%	4%
	43%	30%	16%	12%

HOW DID THEY SPEND THEIR MONEY?

The overseas revenue generated on the island of Ireland reached record levels €5.9/£5.1 billion, the fourth consecutive record year. This is the fourth record year in a row for overseas revenue generated in the Republic of Ireland. Food and drink continues to be the most expensive element of a visit, followed by bed and board. This is true for all market areas except Mainland Europe where an equal amount is spent on bed and board and food and drink.

SS / Ents* – Sightseeing & Entertainment

	Bed & Board	Food & Drink	SS / Ents*	Internal Transport	Shopping	Misc
Total	30%	36%	6%	13%	13%	2%
	28%	39%	6%	12%	11%	4%
	34%	34%	6%	14%	11%	1%
	27%	36%	7%	15%	14%	2%
	30%	34%	6%	11%	18%	2%



HOW MANY NIGHTS DID THEY STAY?

A record 82.8 million overseas bednights were recorded in 2018, that is an increase of almost +20% in the last 10 years or almost +13m more bednights.

Greatest volume growth in bednights was recorded in Q1 in 2018. Quarter 3 (July – September) remains the busiest quarter, especially in terms of holidaynights.

Those travelling further tend to stay longer and this is true across almost all tourist types.

Average length of stay is inflated by those who came for reasons other than holidaying (6.4 nights), visiting friends and / relatives (7.0 nights) and business reasons (6.8 nights). These 'other' reasons have an average stay of 25.4 nights and include those who came to learn English as a foreign language (English language training).

“A record 82.8m overseas bednights were recorded in 2018, that is a +19% increase in the last 10 years.”



	2018 ('000's)	vs. 2017	Average Stay	Share
Total	82,819	+3%	7.4	
	22,258	-4%	4.7	27%
	32,815	+6%	8.9	40%
	17,564	+9%	8.6	21%
	10,182	-0%	14.1	12%

WHERE DID THEY STAY? (bednights)

	Friends / Relatives	Hotel	Rented	B&B / Guesthouse	Other
Total	29%	21%	19%	9%	21%
	50%	24%	10%	5%	11%
	22%	17%	22%	10%	29%
	19%	30%	17%	11%	23%
	27%	17%	35%	7%	15%



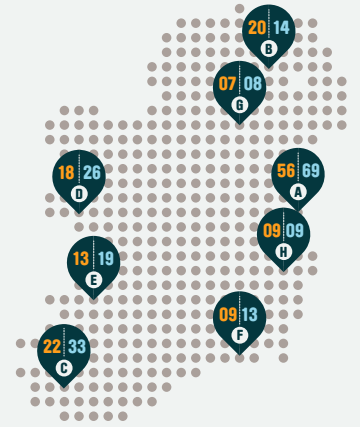
WHERE ON THE ISLAND OF IRELAND DID OUR TOURISTS & HOLIDAYMAKERS STAY?

Overseas tourists included on average 1.5 regions on average in their trip in 2018, while holidaymakers included 1.9 regions. North Americans tend to travel more extensively than other market areas and this is true for both tourists (2.2 regions) and holidaymakers (2.5 regions).

	A	B	C	D	E	F	G	H
	Dublin	Northern Ireland	South West	West	Mid West	South East	Border	Midlands and Mid East
Tourists (000's)	6,309	2,218	2,512	1,963	1,497	1,028	752	1,030
Share	56%	20%	22%	18%	13%	9%	7%	9%
Holidays (000's)	3,875	794	1,850	1,493	1,078	738	479	510
	69%	14%	33%	26%	19%	13%	8%	9%

* Northern Ireland data based on 2018 statistics. All other regional data are based on 2017 statistics, awaiting data to be published.

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



WHERE DID OUR HOLIDAYMAKERS COME FROM?

Almost two-fifths (38%) of all holidaymakers came from Mainland Europe. Our dependence on the British market continues to reduce as their share now stands at 30%, compared with 45% a decade ago. Strong growth in holidaymakers from North America has seen the share of holidaymakers from this region grow from 17% in 2008 to 26% in 2018. The remainder came from Other Areas

	2018 (000's)	vs. 2017	Share
Total	5,639	+11%	
	1,680	+5%	30%
	2,128	+11%	38%
	1,484	+18%	26%
	347	+10%	6%



WHERE DID OUR PROMOTABLE TOURISTS* COME FROM?

Given that holidaymakers make up the majority (93%) of promotable tourists, it is not surprising that the share by market area mirrors to a great extent that of holidaymakers. The other two elements that make up the almost half a million (423k) promotable tourists are promotable business tourists (294k) and English Language Training tourists (129k). Britain and Mainland Europe each contribute about 40% of promotable business tourists each while most (85%) of language students come from Mainland Europe.

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

	2018 (000's)	vs. 2017	Share
Total	6,062	+10%	
	1,794	+4%	30%
	2,360	+9%	39%
	1,519	+18%	25%
	389	+8%	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 (88%).

	AB Managerial Professional	C1 White Collar	C2 Skilled Worker	DE Unskilled Worker
Total	28%	60%	9%	3%
	28%	51%	16%	5%
	25%	61%	10%	4%
	30%	64%	5%	1%
	32%	61%	3%	4%

WHITE COLLAR
60%



HOW LONG DID OUR HOLIDAYMAKERS STAY?

The marginal decline in average length of stay observed in recent years has continued in 2018. In 2013, the average stay was 6.8 nights, in 2014 it was 6.7 nights, 6.6 nights in 2015 – 16, 6.5 night in 2017 and in 2018 it fell to 6.4 nights.

	1–3 nights	4–5 nights	6–8 nights	9–14 nights	15+ nights	Average nights
Total	29%	21%	28%	17%	5%	6.4
	50%	19%	19%	8%	4%	4.3
	27%	23%	23%	20%	7%	6.9
	19%	18%	40%	19%	4%	7.7
	22%	27%	23%	19%	9%	8.7

WHAT AGE ARE OUR HOLIDAYMAKERS?

More than half (56%) of all holidaymakers are 35 years of age or older, though this differs by market area with an older holidaymaker from Other Areas (65% over 35 years) and younger holidaymaker from Mainland Europe (50% are under 35 years).



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

It was a first visit to the island of Ireland for two-thirds (66%) of holidaymakers in 2018. This reflects a significantly higher proportion than a decade ago (55%). The island of Ireland continues to attract the highest incidence of repeat tourists from Britain (56%) and one-in-fourteen tourists from Britain are made by people born on the island of Ireland.



	U16	16-24	25-34	35-44	45-54	55-64	65+
Total	4%	17%	23%	12%	15%	17%	12%
	4%	15%	23%	12%	15%	17%	14%
	5%	18%	27%	13%	16%	15%	6%
	3%	19%	19%	11%	15%	19%	15%
	2%	12%	21%	14%	12%	22%	17%

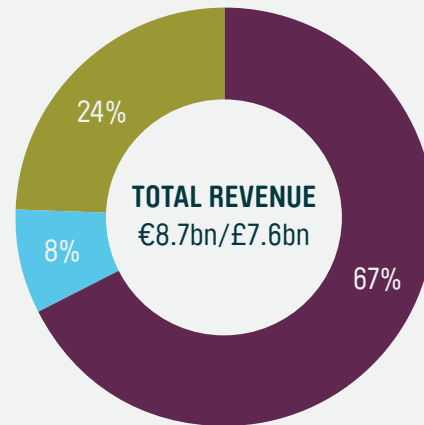
	1st visit	Repeat	Born here
Total	66%	32%	2%
	37%	56%	7%
	70%	29%	1%
	78%	22%	0%
	80%	18%	2%

TOURISM CONTEXT

ALL TOURISM ON THE ISLAND OF IRELAND IN 2018 DOMESTIC AND OVERSEAS

Total tourism on the island of Ireland generated €8.7 / £7.6 billion in 2018. In addition to the €5.9/£5.1 billion generated by overseas tourists, a further €2.1 / £1.9 billion was generated by residents of the Republic of Ireland, with the balance (€734 / £638 million) coming from Northern Ireland residents. Overseas tourists continue to be the most valuable source of tourists for the island of Ireland (North and South), accounting for 43% of all trips, 67% of spend and 69% of nights.

“€8.7/£7.6 billion in revenue was generated from tourism on the island of Ireland in 2018.”



OVERSEAS RESIDENTS

11.2m Trips

€5.9 / £5.1bn

NORTHERN IRELAND RESIDENTS

3.5m Trips

€734 / £638m

REPUBLIC OF IRELAND RESIDENTS

11.5m Trips

€2.1 / £1.9bn

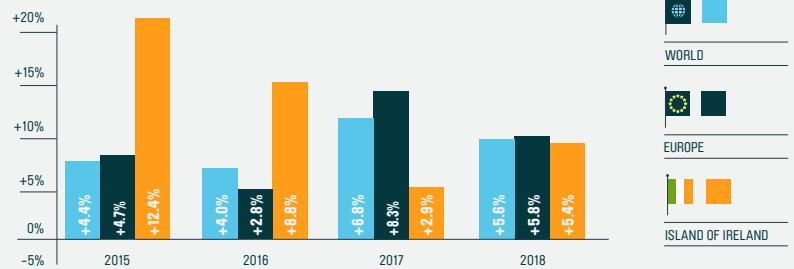
GLOBAL TOURISM TRENDS

Overseas tourists to the island of Ireland has grown by +5.4% in 2018, broadly in line with the pace of growth to the World (+5.6%) and Europe (+5.8%).

With over 700 million arrivals in 2018, Europe accounts for half of the World (overnight) tourist arrivals and revenue and showed robust growth in 2018 following solid growth in 2017 (+8.3%).

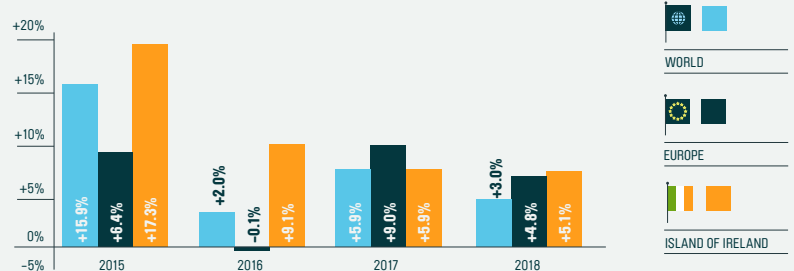


WORLD/EUROPE/ISLAND OF IRELAND TOURISTS: YEAR-ON-YEAR % CHANGE



Source: Oxford Economics Overnight Tourist Arrivals (UNWTO)

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



Source: Oxford Economics Overnight Tourist Arrivals (UNWTO)

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 2018.

CONTACT DETAILS

Tourism Ireland

Bishop's Square
Redmond's Hill
Dublin 2
Ireland
D02TD99

Tel. +353 1 476 3400

Fax. +353 1 476 3666

info@tourismireland.com

Tourism Ireland

Beresford House
2 Beresford Road
Coleraine
Northern Ireland
BT52 1GE

Tel. +44 2870 359200

Fax. +44 2870 326932

corporate.coleraine@tourismireland.com

