



ISLAND OF IRELAND OVERSEAS TOURISM PERFORMANCE

Tourism Ireland
Marketing the island of Ireland overseas

2019 FACTS & FIGURES



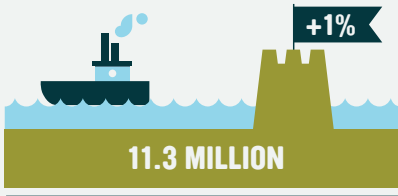
AN EXTRA +100,000
TOURISTS COMPARED
TO 2018

A RECORD
11.3 MILLION
TOURISTS

€5.9b/£5.1b
IN OVERSEAS
REVENUE

OVERSEAS TOURISTS

Over 11.3 million tourists were welcomed on the island of Ireland in 2019, +100k more than in 2018 [+1% increase].



WHERE DID THEY COME FROM?

GB [42%], US [15%], Germany [7%] & France [5%] represented almost seventy percent of all overseas tourists to the island in 2019.



AVERAGE SPEND AND LENGTH OF STAY

The average spend by an overseas tourist and holidaymaker was €518/£451 and €598/£520 respectively. The average length of stay for an overseas tourist was 7.3 nights and holidaymaker was 6.2 nights.



GREAT BRITAIN



NORTH AMERICA



MAINLAND EUROPE



OTHER AREAS

WHY WERE OUR VISITORS HERE?

Half of all visitors to the island of Ireland in 2019 came for a holiday, that is +34,000 (+1%) more holidaymakers than in 2018. One-third came to visit friends and/or relatives (VFR) (an while one-seventh (14%) came for business reasons.



HOLIDAY
50%



VFR
32%



BUSINESS
14%



OTHER
4%

PROMOTABLE VISITORS*

More than 6 million promotable visitors were welcomed to the island in 2019, largely the same as 2018.



OVERSEAS REVENUE

The island of Ireland generated €5.9/£5.1 billion in 2019.



WHERE DID THE REVENUE COME FROM?

US [27%], GB [25%], Germany [8%], & France [5%] represent almost two-thirds (65%) of all overseas revenue generated on the island in 2019.

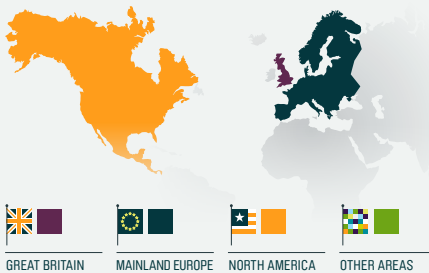


POPULAR PLACES?

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



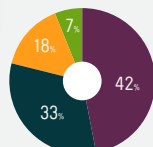
2019 NUMBERS & MARKET AREA SHARE



VISITORS

11,288,000

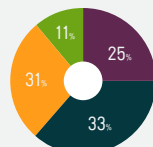
+1%
Change vs 2018



REVENUE

€5,851 million
£5,090 million

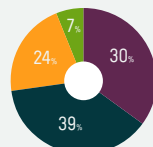
0%
Change vs 2018



PROMOTABLES*

6,084,000

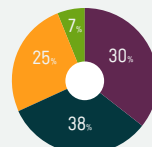
0%
Change vs 2018



HOLIDAYMAKERS

5,673,000

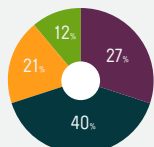
+1%
Change vs 2018



NIGHTS

81,928,000

-1%
Change vs 2018



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

“After 9 years of consecutive growth, 2019 was another record year with 11.3 million overseas tourists welcomed to the island of Ireland.”

WHERE DO OUR VISITORS COME FROM?

2019 was the 5th consecutive record year with 11.3 million overseas visitors welcomed to the island of Ireland, and the 9th consecutive year of growth. That is +100k more tourists than in 2018. 631,000 (or 5.6%) overnights on both sides of the border.

Our Top Markets

Britain, the US, Germany and France remain the island of Ireland's top four inbound markets. They account for 69% of visitors, 68% of holidaymakers and holiday revenue, 65% of revenue and 59% of nights.

Diversification

Our dependence on our top four markets continues to lessen over time as we as we continue to diversify into other markets. The 69% of tourists the top 4 represents in 2019 compares to 74% of all overseas trips in 2009.

Long-haul

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

Fastest Growing

Great Britain (+37k), Poland (+33k), India (+16k), Russia (+12k) and France (+10k) were the strongest contributors to the growth in tourists in 2019. Combined they account for almost +110k additional tourists, more than compensating for a -4% decline in US (-72k) & German tourists (-35k).

“A record 5.7m overseas tourists came for a holiday in 2019, that is half of all tourists contributing €3.4/£3.0bn or 58% of overseas revenue”



WHY WERE OUR VISITORS HERE?

Almost 5.7 million overseas tourists came for a holiday in 2019, the 5th consecutive record year for holidaymakers to the island of Ireland. Holidays represent 50% of all overseas trips and three-fifths (58%) of revenue in 2019. This compares with the 2.9m overseas holidaymakers recorded in 2009, when holidaymakers only accounted for just over a third (37%) of all tourists.

Visiting Friends & Relatives (VFR)

One-in-three (32%) overseas tourists cite 'visiting friends and relatives' as their main reason for visiting in 2019. They account for a third of the island of Ireland's overseas bed nights (31%) and one-fifth of revenue (20%). Northern Ireland continues to rely more heavily on those visiting friends and relatives (58% of nights, 46% of trips and 37% of revenue in 2019), though less so over time as Northern Ireland's potential as a holiday destination is realised (in 2011 VFR represented 56% of nights, 51% of trips, and 44% of revenue).



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

	Island of Ireland			Republic of Ireland			Northern Ireland		
	2019	vs. 2018	Share	2019	vs. 2018	Share	2019	vs. 2018	Share
Total	11,288	+1%		9,674	+1%		2,245	+1%	
	4,785	+1%	42%	3,487	0%	36%	1,461	+3%	65%
	3,770	+3%	33%	3,609	+3%	37%	338	+2%	15%
GERMANY	749	-4%	7%	728	-5%	8%	65	-8%	3%
FRANCE	557	+2%	5%	534	+2%	6%	55	+1%	2%
SPAIN	431	+2%	4%	411	+2%	4%	38	+9%	2%
ITALY	370	-4%	3%	364	-3%	4%	20	-17%	1%
	1,980	-3%	18%	1,902	-3%	20%	280	-8%	12%
USA	1,732	-4%	15%	1,673	-4%	17%	212	-11%	9%
CANADA	248	+2%	2%	229	+2%	2%	68	+3%	3%
	752	+4%	7%	676	+3%	7%	165	+5%	7%
AUS & NZ	252	0%	2%	225	0%	2%	78	+8%	3%

	Holiday	VFR*	Business	Other
Total	50%	32%	14%	4%
	36%	46%	17%	1%
	57%	22%	15%	7%
	72%	18%	6%	5%
	50%	32%	13%	4%

VFR* – Visiting friends and relatives

HOW MUCH DID OUR VISITORS SPEND?



	Island of Ireland				Republic of Ireland				Northern Ireland			
	2019 €m	2019 £m	vs. 2018	Share	2019 €m	2019 £m	vs. 2018	Share	2019 €m	2019 £m	vs. 2018	Share
Total	5,851	5,090	-0%		5,174	4,501	-1%		677	589	+5%	
	1,446	1,258	+3%	25%	1,022	889	0%	20%	424	369	+13%	63%
	1,950	1,697	0%	33%	1,854	1,613	0%	36%	96	84	+2%	14%
	1,769	1,563	-3%	31%	1,706	1,484	-2%	33%	90	79	-14%	13%
	658	753	-1%	11%	593	522	-1%	11%	66	57	-3%	10%

HOW DOES PURPOSE OF VISIT CONTRIBUTE TO SPEND?

Almost three-fifths (58%) of all overseas revenue on the Island of Ireland in 2019 is generated from those who came for a holiday. This varies by market with holidaymakers accounting for 75% of revenue North America, 60% of revenue from Mainland Europe, 45% from Other Areas and 41% of revenue from GB.

	VFR* – Visiting friends and relatives			
	Holiday	VFR*	Business	Other
Total	58%	20%	15%	7%
	41%	34%	23%	2%
	60%	14%	16%	11%
	75%	12%	7%	6%
	45%	31%	15%	9%

HOW DID THEY SPEND THEIR MONEY?

The overseas revenue generated on the island of Ireland reached record levels €5.9/£5.1 billion, solidifying 2018 record levels. Food and drink continues to be the most expensive element of a visit to the island of Ireland, followed by bed and board. This is true for all market areas.

	SS/Ents* – Sightseeing & Entertainment					
	Bed & Board	Food & Drink	SS/Ents*	Internal Transport	Shopping	Misc
Total	29%	37%	6%	13%	13%	3%
	26%	38%	6%	11%	11%	8%
	28%	36%	6%	15%	14%	1%
	32%	36%	6%	13%	11%	1%
	27%	35%	7%	12%	17%	3%



HOW MANY NIGHTS DID THEY STAY?

A record 81.9 million overseas bednights were recorded in 2019, a slight softening (-1%) compared to 2018 as the average stay continues to reduce over time from 8.3 nights in 2010 to 7.3 nights in 2019.

Quarter 3 (July–September) remains the busiest quarter with 34% of nights, especially in terms of holiday nights (41%). Quarter 2 was the only quarter to record an increase in bednights in 2019.

Length of stay varies by type of trip with an average of 6.2 nights for holidaymakers, visiting friends and/ relatives stay on average 7.1 nights, business tourists stay 6.2 nights and tourists here for 'other' reasons such as to learn English as a foreign language have an especially long stay of 25.3 nights).

Those travelling further tend to stay longer regardless of their reason for visiting.

“81.9m overseas bed nights were recorded in 2019, that is a marginal softening compared to 2018, as the average stay continues to decline.”



	2019 (000's)	vs. 2018	Average Stay	Share
Total	81,982	-1%	7.3	
	22,385	+1%	4.7	27%
	32,365	-1%	8.6	40%
	17,071	-3%	8.6	21%
	10,107	-1%	13.4	12%

WHERE DID THEY STAY?

	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%

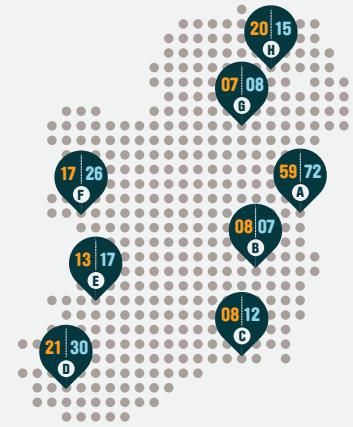


WHERE ON THE ISLAND OF IRELAND DID OUR TOURISTS & HOLIDAYMAKERS STAY?

Overseas tourists included 1.5 regions on average in their trip in 2019, 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	Midlands & Mid East	South East	South West	Mid West	West	Border	Northern Ireland
Visitors (000's)	6,644	954	945	2,335	1,432	1,943	768	2,245
Share	59%	8%	8%	21%	13%	17%	7%	20%
Holidays (000's)	4,069	394	675	1,704	988	1,456	454	852
	72%	7%	12%	30%	17%	26%	8%	15%

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



% HOLIDAYMAKERS % VISITORS

WHERE DID OUR HOLIDAYMAKERS COME FROM?

Almost two-fifths (38%) of all holidaymakers came from Mainland Europe. However, Britain remains the largest single market accounting for 30% of holidaymakers. Following eight consecutive years of growth and six years of double-digit growth, holidaymakers from North America accounted for one-in-four holidaymakers in 2019, despite softening marginally compared to 2018. The remainder came from Other Areas (7% or one-in-fifteen).

	2019 (000's)	vs. 2018	Share
Total	5,673	+1%	
	1,723	+3%	30%
	2,150	+1%	38%
	1,424	-4%	25%
	376	+8%	7%



WHERE DID OUR PROMOTABLE VISITORS* COME FROM?

Given that holidaymakers make up the majority (93%) of promotable visitors, it is not surprising that the share by market area reflects that of holidaymakers. The other two elements that make up the 411k promotable tourists are 294k promotable business visitors and 117k English Language Training visitors. Britain and Mainland Europe comprise about 40% of promotable business visitors each while most (85%) of language students come from Mainland Europe.

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

	2019 (000's)	vs. 2018	Share
Total	6,084	0%	
	1,839	+3%	30%
	2,369	0%	39%
	1,454	-4%	24%
	421	+8%	7%

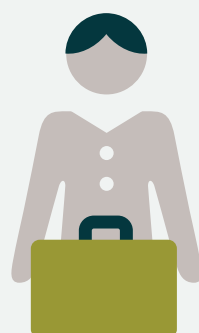
HOLIDAYMAKER PROFILES

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 (89%).

	AB Managerial Professional	C1 White Collar	C2 Skilled Worker	DE Unskilled Worker
Total	24%	65%	8%	2%
	23%	56%	16%	5%
	23%	68%	7%	2%
	26%	67%	6%	2%
	38%	61%	3%	2%

**WHITE
COLLAR
65%**



HOW LONG DID OUR HOLIDAYMAKERS STAY?

The marginal decline in average length of stay observed in recent years has continued in 2019. The average stay was 7.1 nights in 2011, 6.6 nights in 2015-16, 6 and it fell to 6.2 nights in 2019. This long term trend is observed across all market areas and in 2019 in all except GB.

	1-3 nights	4-5 nights	6-8 nights	9-14 nights	15+ nights	Average nights
Total	31%	21%	26%	16%	5%	6.2
	54%	16%	16%	9%	5%	4.3
	28%	24%	25%	17%	6%	6.7
	19%	22%	33%	21%	4%	7.3
	34%	19%	26%	13%	8%	8.5

WHAT AGE ARE OUR HOLIDAYMAKERS?

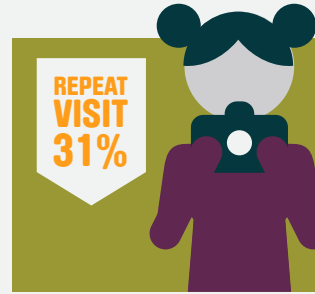
More than half (54%) of all holidaymakers are 35 years of age or older, though this differs by market area with older holidaymakers from Other Areas (62% over 35 years) and younger holidaymaker from Mainland Europe (47% are under 35 years).



	U16	16-24	25-34	35-44	45-54	55-64	65+
Total	4%	15%	26%	12%	14%	16%	12%
	4%	14%	27%	12%	14%	16%	12%
	5%	19%	29%	13%	15%	12%	6%
	3%	13%	24%	9%	12%	22%	18%
	1%	17%	20%	14%	13%	16%	19%

HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

It was a first visit to the island of Ireland for two-thirds (67%) of holidaymakers in 2019, this reflects a significantly higher proportion than a decade ago (59%) driven by an increase in first time holidaymakers from North America and Other Areas (+10% and +11%, respectively). The island of Ireland continues to attract the highest incidence of repeat visitors from Britain (55%) and 6% of visits from Britain are made by people born on the island of Ireland.



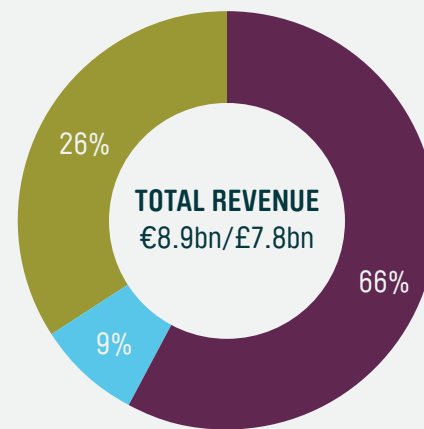
	1st visit	Repeat	Born here
Total	67%	31%	2%
	39%	55%	6%
	68%	31%	1%
	82%	18%	0%
	82%	18%	0%

TOURISM CONTEXT

ALL TOURISM ON THE ISLAND OF IRELAND

Total tourism on the island of Ireland generated €8.9/£7.8 billion in 2019. In addition to the €5.9/£5.1 billion generated by overseas visitors, a further €2.3/£2.0 billion was generated by residents of the Republic of Ireland, with the balance (€759/£666 million) coming from Northern Ireland residents. Overseas visitors continues to be the most valuable source of tourists for the island of Ireland (North and South), accounting for 68% of nights, 66% of spend and 41% of all trips.

“€8.9bn/£7.8bn in revenue was generated from tourism on the island of Ireland in 2019.”



OVERSEAS RESIDENTS

11.3m Trips

€5.9/£5.1bn (66%)

NORTHERN IRELAND RESIDENTS

3.6m Trips

€759/£666m (9%)

REPUBLIC OF IRELAND RESIDENTS

12.4m Trips

€2.3/£2.0bn (26%)

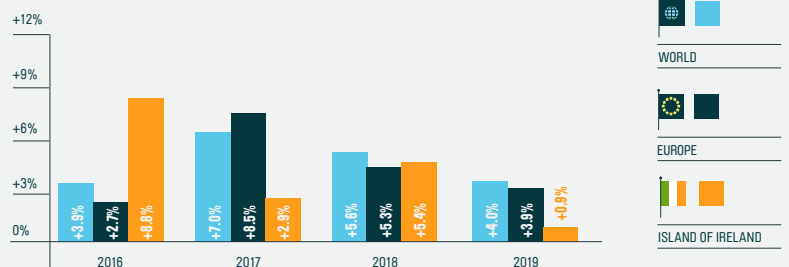
GLOBAL TOURISM TRENDS

2019 was another year of growth in overseas tourist for the island of Ireland, though growth was slower than recent years and than the increase in Worldwide and European tourism.

However, this marginal increase in tourists to the island of Ireland in 2019 did not translate to an increase in overseas revenue.

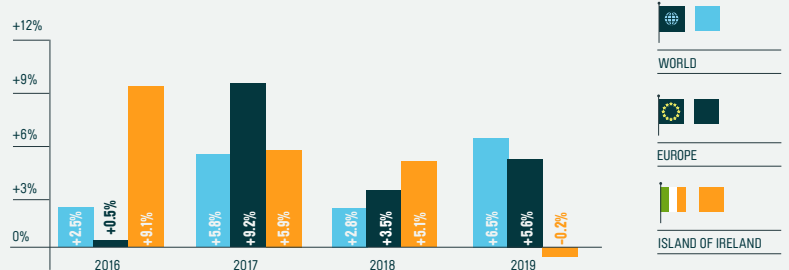


WORLD/EUROPE/ISLAND OF IRELAND TOURISTS: YEAR-ON-YEAR % CHANGE



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 2019.

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