

# Ireland

## Tourism in the economy

With strong growth in recent years, tourism has reinforced its position as an important economic sector in Ireland, bringing jobs and revenue to all parts of the country. In 2018, revenue from overseas tourists exceeded EUR 5 billion for the first time and the total value of tourism expenditure to the economy amounted to EUR 9.4 billion, some 3% of GDP. Tourism industries directly employ 225 500 people, accounting for 10.3% of total employment. Travel exports accounted for 2.9% of total service exports in 2018.

Over the 2016-18 period, spending by North American visitors was the main driver, behind overseas revenue growing by 30% from EUR 1.3 million to EUR 1.7 million. Ireland received 9.3 million international tourists in 2018, up 6.3% over 2017. Mainland European and long-haul markets also performed well and while revenues from Great Britain declined, it continues to be an important volume market. Examining the purpose of trip for overseas visitors in 2018 shows that 49.3% were holidaymakers, 13.5% travelled on business while 25% visited friends and relatives.

Domestic tourism expenditure has also grown totalling EUR 2.0 billion in 2018 a rise of 11.6% over 2016 values. Domestic tourists significantly increased by 13.4% to total 10.9 million overnight visitors in 2018 up from 9.6 million in 2017. A total of 28.4 million bed-nights were recorded in 2018, reflecting an increase of 11.2% from the 25.5 million bed-nights recorded in 2017.

## Tourism governance and funding

The Tourism Division within the Department of Transport, Tourism and Sport sets national tourism policy and provides the strategic direction to support the growth of a competitive and sustainable tourism industry. Two agencies overseen by the Department deal with the administration of that policy:

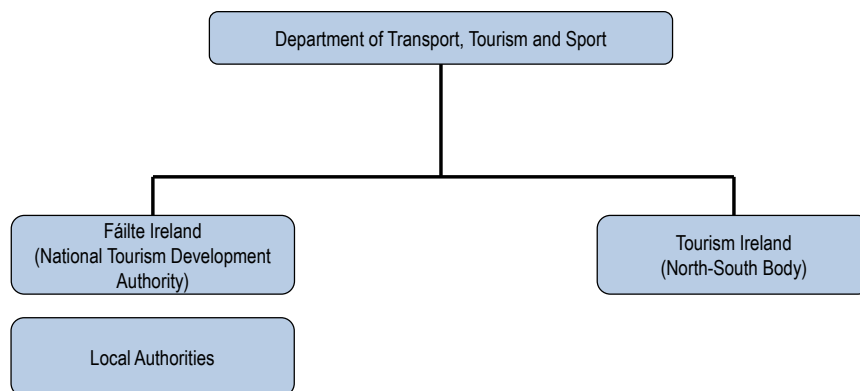
- Fáilte Ireland, the National Tourism Development Authority, was established under the National Tourism Development Authority Act 2003 to support the tourism sector and work to sustain Ireland as a high-quality and competitive tourism destination. It provides a range of practical support measures to help tourism businesses better manage and market their products and services and develop experiences in line with Fáilte Ireland's experience brands (Wild Atlantic Way, Ireland's Ancient East, Ireland's Hidden Heartlands, and Dublin: Surprising by Nature). Fáilte Ireland also works with other state agencies and representative bodies, at local and national levels, to implement and champion positive and practical strategies that will benefit Irish tourism and the Irish economy.
- Tourism Ireland Ltd, the all-island tourism marketing company, was formally incorporated in 2000 following the Good Friday Agreement with the responsibility for marketing the island of Ireland overseas as a holiday and business tourism destination.

Local authorities are also active in tourism, working closely with Fáilte Ireland. All have published a Tourism Statement of Strategy, setting tourism objectives and a programme of investment and promotion, and have

an officer with responsibility for the co-ordination of tourism development in the area. These plans form part of the Local Economic and Community Plans, the delivery of which is driven by local authorities.

The central budget allocated to tourism amounted to EUR 134.3 million in 2018 rising to EUR 168.7 million in 2019. Of that figure, EUR 15.1 million is allocated to the Department, EUR 89.8 million to Fáilte Ireland and EUR 63.7 million to Tourism Ireland. These amounts do not include any local authority funds.

### Ireland: Organisational chart of tourism bodies



Source: OECD, adapted from the Department of Transport, Tourism and Sport, 2020.

### Tourism policies and programmes

The Government's national tourism policy, *People, Place and Policy: Growing Tourism to 2025* is implemented by way of action plans. The Tourism Action Plan 2019-2021 sets out 27 actions aimed at helping tourism to continue to grow sustainably to 2025. This latest action plan, published in December 2018, focuses on the following areas: policy and research, marketing Ireland as a visitor destination, enhancing the visitor experience, supporting local communities and co-ordinating the industry. In general, the actions address the potential for more sustainable tourism, regional growth, season extension, enhanced experiences and also reflect the need for a whole-of-government approach in support of tourism. Specific focus is currently being given to the development of principles for sustainable tourism, the identification of new and emerging markets, best practice as regards accessible tourism and a review of data and tools to improve understanding of tourism trends.

A number of wider challenges relating to the United Kingdom's withdrawal from the European Union and the world economy are of current concern, with both potentially having impacts on Ireland's tourism sector. Domestically, there is a risk that strong demand for tourism accommodation coupled with a tightening labour market could exacerbate competitiveness pressures in the sector. Additionally, any reduction in air access would pose a major risk for tourism given Ireland's reliance on overseas tourism.

In May 2019, Fáilte Ireland launched *Platforms for Growth*, a EUR 150 million four year capital investment programme. Major new visitor attractions of scale will be developed and existing attractions enhanced. This is the largest investment programme of its kind to benefit tourism with individual grants available for major visitor attractions of EUR 2.5 million upwards. It specifically targets 'platforms' or project types that have the greatest potential to grow tourism across Ireland and throughout the year. The first 'Platform' focuses on developing *Immersive Heritage and Cultural Attractions* that appeal to overseas visitors looking for experiences that help them to connect with Ireland and bring the country's culture, heritage and people to life. This call for proposals is part of a suite of tourism capital grants programmes envisaged under the

Fáilte Ireland's Tourism Investment Strategy for the period 2016-2022 and is part of the Grants Scheme for Large Tourism Projects 2016-2020.

More broadly, other future policy initiatives include the *Climate Action Plan* published in June 2019 which sets out a whole-of-Government approach to climate action and maps a potential pathway to meet Ireland's 2030 emission reduction commitments. Whilst the Plan does not address tourism directly it is clear that many related sectors, such as transport, will be subject to significant change and adaptation. As a tourism focused sustainability initiative, a long term strategy was launched in 2018 for the development of Greenways across the country with the aim of increasing the number, length and regional spread of Greenways over the next ten years (Box 1.22).

In 2019, the Government also developed *Future Jobs Ireland* and *Global Ireland*, two frameworks that seek to strengthen the economy and develop and reposition Ireland's international presence with both strategies having a tourism dimension. The *Global Ireland* Strategy sets out ambitious targets to grow tourism from new and emerging markets, as well as established markets such as the United States and Germany, based on market strategies for growth. *Future Jobs Ireland* commits to delivering key business development programmes to senior and middle managers across the tourism sector. These strategies, together with *Project Ireland 2040*, the Government's long-term investment strategy, represent an integrated approach to prepare for the opportunities and challenges of the future economy.

## Statistical Profile

### Ireland: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	8 991	9 125	9 359	9 626	10 919
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	26 086	25 267	25 589	25 539	28 393
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	6 824	7 747	8 425	8 722	9 273
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Great Britain	2 789	3 119	3 394	3 239	3 253
Other Europe	1 521	1 787	1 965	2 081	2 203
United States/Canada	1 121	1 271	1 447	1 682	1 924
Germany	533	604	619	637	755
France	418	469	490	508	521
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	6 515	6 965	7 405	7 939	8 276
Overnight visitors (tourists)	6 326	6 781	7 224	7 728	8 085
Same-day visitors (excursionists)	189	184	181	211	191
Top destinations					
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR</b>					
<b>Inbound tourism</b>					
Total international receipts	8 351	10 355	11 396	12 541	12 455
International travel receipts	3 656	4 315	4 685	4 972	5 237
International passenger transport receipts	4 695	6 040	6 711	7 569	7 218
<b>Outbound tourism</b>					
Total international expenditure	4 912	5 227	5 707	5 897	6 352
International travel expenditure	4 827	5 143	5 623	5 814	6 270
International passenger transport expenditure	85	84	84	83	82

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077027>

## Ireland: Enterprises and employment in tourism

	Number of establishments <sup>1</sup>	Number of persons employed				
	2017	2014	2015	2016	2017	2018
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>46 132</b>	<b>194 805</b>	<b>204 887</b>	<b>216 816</b>	<b>225 542</b>	..
Accommodation services for visitors	18 554	142 907	151 681	161 351	169 926	..
Hotels and similar establishments	..	..	..	..	..	..
Food and beverage serving industry	..	..	..	..	..	..
Passenger transport	15 783	20 463	20 843	21 386	21 841	..
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	..	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	..	..	..	..	..
Travel agencies and other reservation services industry	1 503	7 088	7 311	7 705	8 172	..
Cultural industry	10 292	24 347	25 052	26 374	25 603	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	..	..	..	..	..

.. Not available

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077046>

## Ireland: Internal tourism consumption

Million EUR

	2007		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>3 142</b>	<b>3 637</b>	<b>6 779</b>
Tourism characteristic products	2 337	2 875	5 212
Accommodation services for visitors	228	672	900
Food and beverage serving services	983	932	1 915
Passenger transport services	762	1 062	1 824
Air passenger transport services	..	..	..
Railways passenger transport services	..	..	..
Road passenger transport services	..	..	..
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	..	..	..
Travel agencies and other reservation services industry	155	12	167
Cultural services	209	197	406
Sports and recreation services	..	..	..
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	805	762	1 567
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077065>



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