

Domestic vs. Overseas Tourism - Ireland - December 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Despite economic and political uncertainty and volatility following the Brexit vote, the tourism industry continues to grow in NI and RoI alike as the destinations note an increase in visitor arrivals and tourist expenditure. Irish consumers engage in the quest for authentic, meaningful, and memorable experiences by discovering Ireland’s rich heritage and outstanding natural beauty.”

– **Joanna Kempniak, Market Research Analyst**

This report looks at the following areas:

- Tourism revenue playing a significant role in IoI economy
- Irish consumers more likely to holiday 'at home'
- Irish consumers visit top tourist attractions in record numbers
- Brexit posing a threat to Irish tourism sector

The Report evaluates the tourism performance across the island of Ireland. It examines the main market drivers and trends affecting the industry, and influencing consumer behaviour. Moreover, it highlights the key issues within global tourism markets. Finally, it draws on consumer research and examines the preferences and general tourism behaviour of Irish consumers.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Domestic vs. Overseas Tourism - Ireland - December 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

- What you need to know
- Issues covered in this Report
- Definition

Executive Summary

The market

- Figure 1: Estimated total of overnight trips, 000s, NI and RoI, 2012-17
- Figure 2: Estimated overseas visitor numbers, IoI, NI and RoI, 2016 and 2017
- Figure 3: Estimated domestic visitor numbers, IoI, NI and RoI, 2016 and 2017
- Figure 4: Estimated total visitor expenditure, IoI, NI and RoI, 2012-17

Market forecast

- Figure 5: Estimated domestic and overseas visitor numbers, IoI, 2012-22

Market drivers

- Tourism revenue playing a significant role in IoI economy
- Irish consumers more likely to holiday 'at home'
- Irish consumers visit top tourist attractions in record numbers
- Brexit posing a threat to Irish tourism sector
- Competitive strategies and key markets

The consumer

Independently booked short breaks and holidays the preferred type of getaways amongst Irish consumers

- Figure 6: Types of trips undertaken by Irish consumers in Northern Ireland or the Republic of Ireland within the last 12 months, NI and RoI, September 2017
- Figure 7: Types of trips undertaken by Irish consumers overseas within the last 12 months, NI and RoI, September 2017

Irish consumers visit capital cities and escape to the countryside

- Figure 8: Locations visited by consumers for their last short break in Northern Ireland or the Republic of Ireland, NI and RoI, September 2017
- Figure 9: Locations visited by consumers for their last holiday in Northern Ireland or the Republic of Ireland, NI and RoI, September 2017

Irish consumers visit Great Britain for short breaks, but prefer Spain for overseas holidays

- Figure 10: Locations visited by consumers for their last short break overseas, NI and RoI, September 2017
- Figure 11: Overseas locations visited by consumers during their last holiday, NI and RoI, September 2017

Irish consumers visiting pubs, shops, parks/gardens and historical attractions during short breaks and holidays

- Figure 12: Types of activities done by consumers during last short break (in Ireland or abroad), NI and RoI, September 2017
- Figure 13: Types of activities done by consumers during last holiday (in Ireland or abroad), NI and RoI, September 2017

The Market – What You Need to Know

- Positive outlook on future of Ireland's tourism
- Tourism industry boosts Ireland's economy
- Domestic tourism on the rise
- Visitor attractions note record numbers

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Domestic vs. Overseas Tourism - Ireland - December 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Impact of Brexit on Irish tourism industry

Market Size and Forecast

Growth in visitor numbers to Ireland

Promising future for Ireland's tourism industry

Figure 14: Estimated total of overnight trips, 000s, IoI, NI and RoI, 2012-22

Overseas visitor numbers to Ireland on the rise

Figure 15: Estimated overseas visitor numbers, NI and RoI, 2012-22

Increase in visitors holidaying 'at home'

Figure 16: Estimated domestic visitor numbers, NI and RoI, 2012-22

Domestic tourism in NI

Figure 17: Estimated total of domestic overnight trips, 000s, NI, 2011-16

Domestic tourism in RoI

Figure 18: Estimated total of domestic overnight trips, 000s, RoI 2011-16

Visitor expenditure on the rise

Figure 19: Estimated total visitor expenditure, IoI, NI and RoI, 2012-22

NI visitor spending

Figure 20: Estimated domestic and overseas visitor expenditure, NI, 2012-22

RoI visitor spending

Figure 21: Estimated domestic and overseas visitor expenditure, RoI, 2012-22

Market Drivers

Tourism as a driver for Ireland's economy

Growing popularity of staycation

Figure 22: Exchange rates involving Sterling and the euro, January 2016-September 2017

Irish tourist attractions see rise in visitor numbers

Figure 23: Types of activities overseas visitors (including NI) took part in, RoI, 2016

Figure 24: Types of activities domestic holidaymakers took part in, RoI, 2016

Figure 25: Types of activities overseas visitors (including RoI) took part in, NI, 2016

Figure 26: Types of activities domestic holidaymakers took part in, NI, 2016

Giant's Causeway top attraction in NI

Figure 27: Top 10 visitor attractions, by number of visitors, NI, 2015 and 2016 *

Guinness Storehouse remains top attraction in RoI

Figure 28: Top 10 visitor attractions, by number of visitors, RoI, 2015 and 2016

Brexit and its implications for Ireland's tourism industry

Figure 29: How consumers feel Brexit will impact their future personal situation, NI and RoI, September 2017

Figure 30: How consumers describe their finances compared to a year ago, NI and RoI, September 2017

Competitive Strategies and Key Markets – What You Need to Know

VisitBritain, Italian National Tourist Board and Brand USA seek to disperse tourism benefits

France targeting families for winter tourism

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Domestic vs. Overseas Tourism - Ireland - December 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Australia focusing on youth market for tourism growth
- Chinese and Indian tourists benefit from UK and Irish government legislation
- China National Tourist Administration focuses on the ancient Silk Road for 2017 campaign

Competitive Strategies and Key Markets

Great Britain – VisitBritain

Figure 31: Visits made to visitor attractions in membership of Association of Leading Visitor Attractions (ALVA), UK, 2015 and 2016

Germany – The German National Tourist Board

#GermanySimplyInspiring

France – Atout France

Winter in France

US – Brand USA

Plan Your US Trip Now

Spain – Turespaña

Italy – Italian National Tourist Board

Discover Italy

Australia – Tourism Australia

#AussieNewsToday

China – China National Tourist Administration

Beautiful China: 2017 – Year of Silk Road Tourism

India – Ministry of Tourism

Company Profiles

Tourism NI

Key facts

Marketing activities

Recent developments

Fáilte Ireland

Key facts

Figure 32: Visitors to Ireland, January-September 2016 and 2017

Marketing activities

Meet in Ireland

Recent developments

Tourism Ireland

Key facts

Marketing activities

Global Greening campaign

Recent developments

Who's Innovating?

Fáilte Ireland develops new segmentation plan to help maximise Brand Ireland

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Domestic vs. Overseas Tourism - Ireland - December 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Subscription-based travel apps can leverage new travel segments

Fox Tripper

The Consumer – What You Need to Know

Irish consumers showing preferences towards independently booked short breaks and holidays

City breaks and escapes to the country attracting Irish consumers

GB top overseas spot for short breaks; longer holidays in sunny Spain

Pub, shops, parks and gardens key short break and holiday activities

The Consumer – Type of Domestic and Overseas Breaks Taken

Independent short breaks preferred by Irish consumers when 'at home'

Figure 33: Types of trips undertaken by Irish consumers in Northern Ireland or the Republic of Ireland within the last 12 months, NI and RoI, September 2017

Domestic independent short breaks popular amongst Irish men, ABC1s, Millennials and Gen X

Figure 34: Consumers who have taken an independent short break (1-3 nights) in Northern Ireland and/or the Republic of Ireland in the last 12 months, by gender, age and social class, NI and RoI, September 2017

Independent holiday preferred by Irish consumers when 'away'

Figure 35: Types of trips undertaken by Irish consumers overseas within the last 12 months, NI and RoI, September 2017

Overseas independent holiday preferred by Irish Baby Boomers and more affordable for ABC1s

Figure 36: Consumers who have taken an independent holiday (4 or more nights) overseas in the last 12 months, by age and social class, NI and RoI, September 2017

The profile of Irish non-holidaymakers

Figure 37: Consumers who have not taken any domestic short break and holiday in Northern Ireland and/or the Republic of Ireland in the last 12 months, by gender, age and social class, NI and RoI, September 2017

The rise of female and solo travellers – untapped markets and the opportunities for growth

Figure 38: Types of trips undertaken by Irish consumers in Northern Ireland, the Republic of Ireland or overseas within the last 12 months, by gender, NI and RoI, September 2017

Solo travel low

Figure 39: Types of trips undertaken by Irish consumers in Northern Ireland, the Republic of Ireland or overseas within the last 12 months, by marital status, NI and RoI, September 2017

The Consumer – Favourite Domestic and Overseas Destinations

Capital cities are the biggest draw

Figure 40: Locations visited by consumers for their last short break in Northern Ireland or the Republic of Ireland, NI and RoI, September 2017

Ireland's capital cities popular among Millennials and Generation X

Figure 41: Consumers who have taken a short break in the City of Belfast or City of Dublin, by gender, age and social class, NI and RoI, September 2017

City breaks and escapes to the country popular holiday destinations for Irish consumers

Figure 42: Locations visited by consumers for their last holiday in Northern Ireland or the Republic of Ireland, NI and RoI, September 2017

Munster and Ulster as popular domestic holiday destinations

Figure 43: Locations visited by consumers for their last holiday in Munster and Ulster, by gender and age, NI and RoI, September 2017

Great Britain number one choice for overseas short breaks

Figure 44: Locations visited by consumers for their last short break overseas, NI and RoI, September 2017

Generation X and Baby Boomers visiting GB

Figure 45: Consumers who have taken a short break to GB, by gender and age, NI and RoI, September 2017

Spain attracting Irish holidaymakers as a holiday destination

Figure 46: Overseas locations visited by consumers during their last holiday, NI and RoI, September 2017

Irish men and Baby Boomers holidaying in mainland Spain

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Domestic vs. Overseas Tourism - Ireland - December 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 47: Consumers who have taken a holiday to mainland Spain, by gender, age and social class, NI and RoI, September 2017

The Consumer – Type of Activities Undertaken by Irish Consumers

Pub visits, shopping, nature trips and excursions important to short breaks

Figure 48: Types of activities done by consumers during last short break (in Ireland or abroad), NI and RoI, September 2017

Similar activities undertaken for holidays as short breaks

Figure 49: Types of activities done by consumers during last holiday (in Ireland or abroad), NI and RoI, September 2017

Irish women and younger Millennials more inclined to shop during short breaks

Figure 50: Shopping done by consumers during last short break and holiday (in Ireland or abroad), by gender and age, NI and RoI, September 2017

Irish men visit the pubs when on a short break, but women more likely to do so while on holiday

Figure 51: Visiting pubs during last short break and holiday (in Ireland or abroad), by gender and age, NI and RoI, September 2017

Irish consumers like to relax on beach when holidaying

Figure 52: Relaxing on a beach during the last holiday (in Ireland or abroad), by gender and age, NI and RoI, September 2017

Men interested in visiting historical attractions

Figure 53: Visiting historical attractions during last short break and holiday (in Ireland or abroad), by gender and age, NI and RoI, September 2017

Appendix – Data Sources, Abbreviations and Supporting Information

Consumer research

Data sources

Market size rationale

Abbreviations

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com