

28th June 2024

Irish Tourism: Towards Resilience



13% of workforce

40k businesses

254k jobs

IRISH TOURISM DASHBOARD

APRIL 2024

Selected performance indicators

	Latest month	Numbers	vs. same month '23
Dublin Airport	Apr	2,760,000	-2%
Cork Airport	Apr	243,800	-2%
Shannon Airport	Apr	176,800	+0.4%
Ferries	Apr	171,700	-20%

Dublin hotels Apr '24 (Apr '23)	Domestic tourism 2023 (vs 2022)
ADR: €161.61 (2023: €177.70)	Trips: 14.3m (+7.5%) Hols: 6.4m (-4%)
Occupancy: 84.9% (2023: 85.6%)	Value: €3.1bn (+7%) Value: €1.9bn (+3%)

Employment: Q1 2024: 244,000 (Q1 2023: 242,000)

Outlook & Challenges

- The estimated volume and expenditure data for inbound tourists suggests a strong performance in April 2024 compared to last year, based on the CSO survey. However, reports from across the industry suggest a more modest year on year increase in demand and expenditure from overseas.
- April typically accounts for up to 9% of annual visitor volume. April in 2024 & 2023 included departing Easter visitor traffic. This is the first month which allows comparisons with 2023 as a result of changes in methodology and sampling introduced by CSO last year.
- Foreign visitors departing in April 2024 spent 3.5m nights in the country, an average stay of 6.4 nights, spending an average of €1,033 per trip.
- An estimated 50% of visitors used serviced accommodation in hotels, guesthouses and B&Bs during their stay, while 39% stayed with family or friends.

North America

	APR '24	Q1 2024
Numbers	105,700	221,600
Revenue	€208.3m	€393.4m

APR '24	USA	Canada
Numbers	89,300	16,400
Q1 2024		
Numbers	198,200	23,500

Great Britain

	APR '24	Q1 2024
Numbers	210,800	589,700
Revenue	€132.4m	€345.9m

Mainland Europe

	APR '24	Q1 2024
Numbers	203,900	523,900
Revenue	€185.6m	€447m

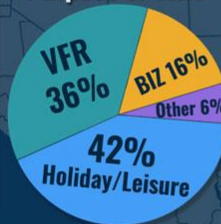
APR '24	France	Germany	Italy	Spain/Port.
Numbers	36,600	40,000	22,400	30,700
Q1 2024				
Numbers	74,500	82,100	57,100	76,800

TOTAL APRIL '24

	APR '24	Q1 2024
Numbers	549,100	1,404,000
Revenue	€567.4m	€1,347m

* Foreign overnight visitors, departing in March
** Includes fares to Ireland

Purpose of Visit



Rest of World

	APR '24	Q1 2024
Numbers	28,700	71,400
Revenue	€41.1m	€161m

APR '24	Aus/NZ	Other
Numbers	8,100	20,600
Q1 2024		
Numbers	20,200	51,200

Summer 2024 Seat Capacity by Main Market: Comparison vs. 2023

Market	Seats (000s)	Capacity vs. S'23	Share of Seats S'24 (S'23)	
Great Britain	4,100	-4%	30.1%	(32.8%)
Mainland Europe	7,200	+7%	53.4%	(51.9%)
North America	1,700	+13%	12.5%	(11.5%)
Rest of World	500	+10%	3.9%	(3.7%)
All Markets	13,500	+4%	100%	(100%)

Source: OAG / Fáilte Ireland analysis



Multiple transatlantic gateways

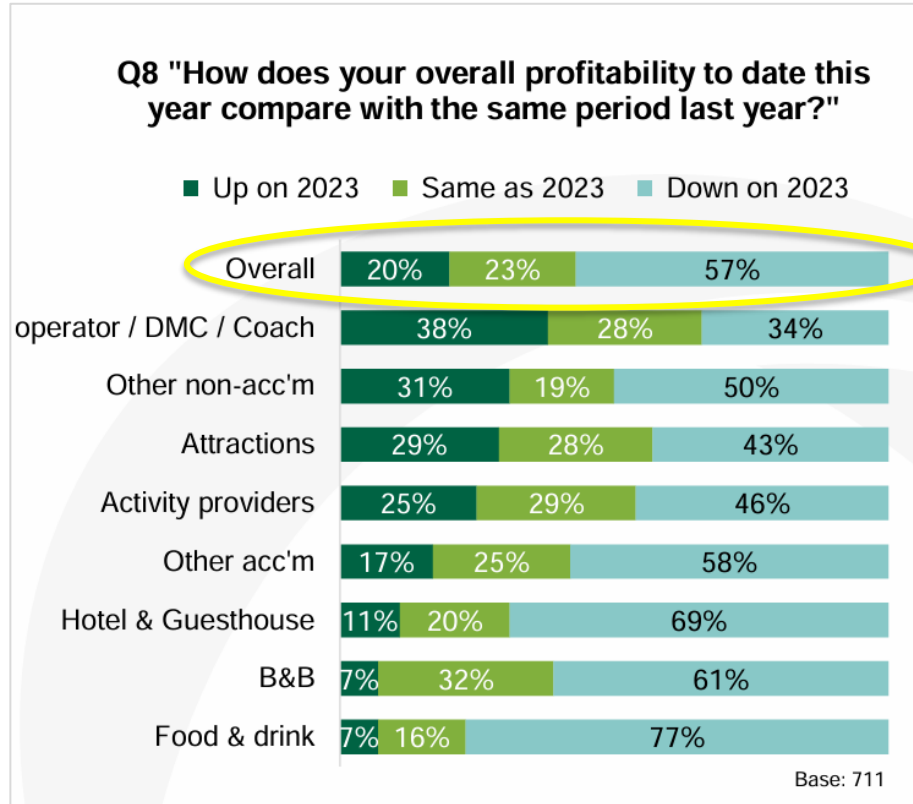


But 2024 a soft season?



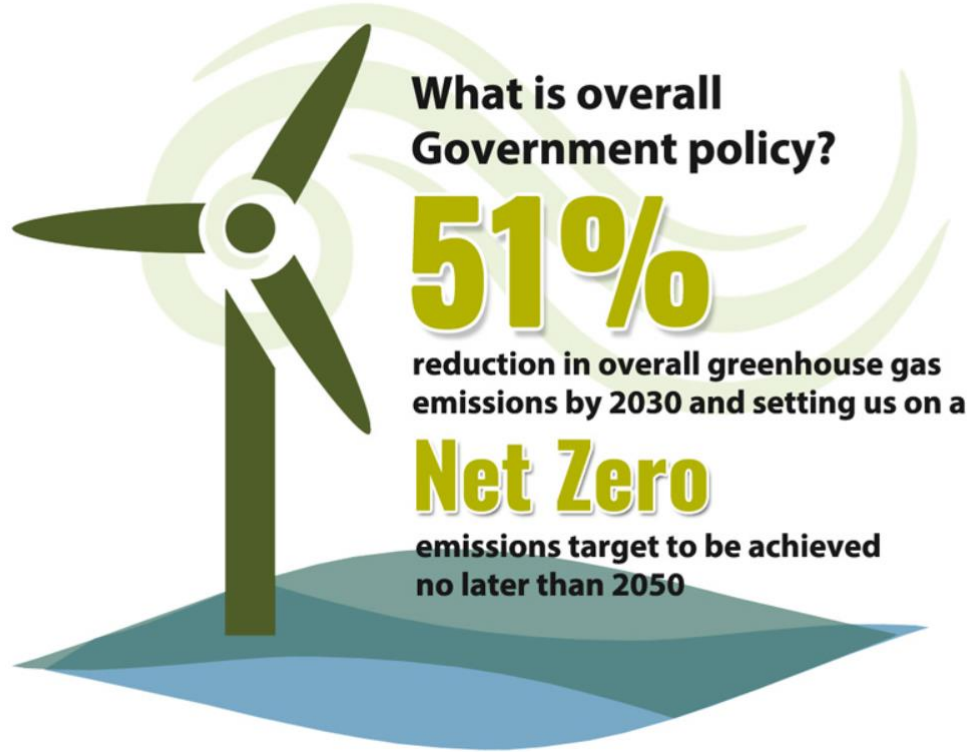
Cost, Capacity & Competitiveness

Profitability a huge challenge



Government Tourism Policy

- Due soon
- Stakeholder consultation complete
- Public consultation under way
- Must match responsible ambition set by industry
 - +50% revenue by 2030
- Carbon reduction can live alongside revenue growth

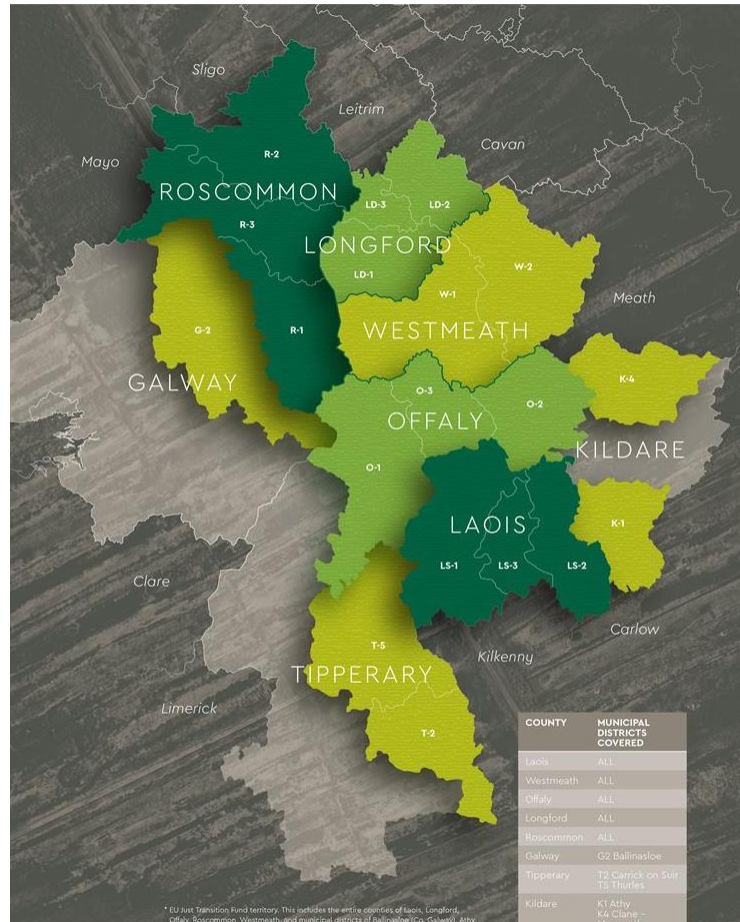


...but progress slow



Just Transition Fund

€68 million



Shannon cruises



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Thank You

