NUI Galway
OÉ Gaillimh

Whitaker Institute

Tourism Sectoral Overview

Galway City and County Economic and Industrial Baseline Study

TOURISM SECTORAL OVERVIEW

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Acknowledgements

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Our Approach[1]

Our approach in undertaking this overview of the tourism sector was to take a global and national perspective before focusing on the regional and local level. One of the main limitations we faced preparing this sector review is the lack of quality and reliable data at the local level. The framing of the global and national level overviews against publicly available local data provides a basis and context to consider the future of the in Galway City and County.

[1] The information contained in this overview has been compiled from many sources that are not all controlled by the Whitaker Institute. While all reasonable care has been taken in the compilation and publication of the contents of this resource, Whitaker Institute makes no representations or warranties, whether express or implied, as to the accuracy or suitability of the information or materials contained in this resource.

Executive Summary Overview of the Tourism Sector

Global Overview

- International tourism arrivals have increased by 5%, since 2013, with destinations worldwide receiving 517 million international tourists in the first half of 2014.
- Forecasted by 2030 international tourism arrivals will increase to 1.8 billion.
- 1 in 11 jobs are tourism related.
- Europe comprises 42% of world's tourism receipts, generating the highest earnings of $489 billion in 2013.
- 52% of inbound tourism travel purpose was leisure, recreation and holidays in 2013.
- There was 2.5% growth in revenue for 2014 for the global hotel and resorts industry.
- Key drivers of growth are economic based, globalisation, changes in demographics, technology, as well as emerging market growth.
- EU policy aims to promote tourism so as to maintain it as a leading destination

National Overview

- Ireland has experienced an increase of 12.3% in inbound visitors to 2,126,600 within the first half of 2014.
- Great Britain, other European countries and North America are the top three inbound tourists to Ireland in 2014.
- There was a 5.2% increase in domestic trips in first six month 2014, resulting in 4.6 million beds per night with an average stay of 2.6 nights
- 7.1 million domestic trips being taken by Irish residents in 2013

- €1.3 billion total expenditure on domestic trips in 2013.
- One sixth of domestic trips were to the West of Ireland with an average length of stay by Irish residents of 3.3 nights, which is the second longest after the South-West.
- €265 million is the estimated expenditure by Irish residents on domestic travel in the West in 2013.
- 8 out of 10 Irish hotels expect to increase their volume of business in 2015, with 63% of guesthouses expecting increased volumes and 66% of B&Bs anticipating increased business.
- Ireland was named by the Lonely Planet as one of the top five countries in the world to visit.
- There was a 45% increase in the number of visitors arriving by air into Ireland from 2000 to 2012, from 8.1 million to 11.9 million. The increased air traffic into Ireland has positively influenced the improved levels of tourism in Ireland.
- Dublin Airport saw over 20 million passengers in 2013 and Shannon saw 1.28 million passengers with Cork achieving 1.25 million in 2012.
- Nearly 7 million overseas visitors came to Ireland in 2013 from all across the world.
- €317 per visitor is generated by the West, which is the third highest revenue in the State.
- 30% was spent on bed and board and 20% was spent on other food and drink by overseas visitors to the State in 2013.
- 2.5 million tourists visited cultural/historical sites in 2013.
- Ireland has set targets for 50,000 extra jobs to be created in tourism and hospitality and €1.7 billion more in annual revenue in the new Tourism Policy.

Regional and Local Overview

- Galway accounted for 15.8% of total overseas visitors coming into Ireland in 2014.
- Galway's inbound overseas visitors increased at a higher rate than Ireland at 10.3% between 2013 and 2014.
- Galway experienced the third highest number of overseas visitors after Dublin and then Cork in 2012 and 2013, growing at a rate of 6.2%.

- Mainland Europe accounts for a large proportion of overseas visitors into Galway, 30% of these visitors come from North America

- In 2013, Galway attracted 199,000 British tourists, an increase of 11.8%.

- Galway generated €253 million in revenue from overseas visitors in 2012 with 38% of Galway's total revenue being generated by North American visitors.

- Galway attracts 10.4% of Ireland's total domestic visitors.

- 739,000 Irish residents travelled to Galway in 2013.

- Galway generated €148 million from domestic spending in 2013.

- Galway is showing positive RevPAR growth with Galway's RevPAR up 6% to €45.02 with an occupancy percentage of 67.4% as of 2013

- The reduced VAT rate has resulted in the creation an additional 1,203 new direct jobs in Galway within the tourism, food and hospitality sector.

- Galway airport has recently reopened to commercial flights with the first commercial jet, under the new licence, arriving on the 13th January 2015 from Stuttgart in Germany.

- Galway is famous for being the festival capital of Ireland, hosting 122 festivals and events for the year 2015

- Some 25% or 87,962 passengers from Shannon airport visited Galway with 48% of visitors to Galway stayed in a hotel, 16% stayed in a B&B, 7% stayed in self-catering accommodation and 39% went to stay with friends or relatives.

- There are 35 heritage sites, 31 museums and 10 art galleries in Galway City and County.

- Some 167,464 overseas tourists visited Connemara National Park in 2012.

- 689kms of Galway's coastline runs through the Wild Atlantic Way.

Global Overview of the Tourism Sector

Global Overview

Introduction

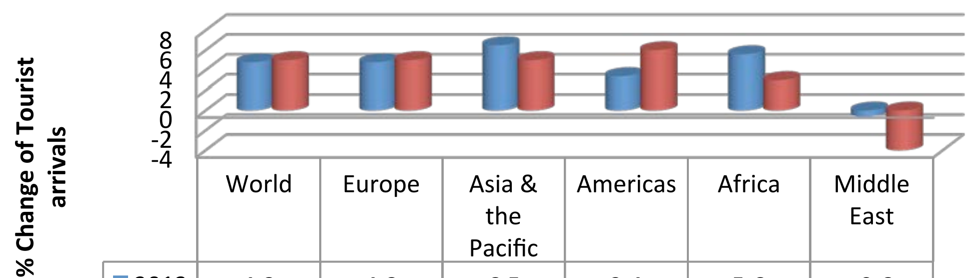
Despite the current geopolitical and economic challenges, international tourism arrivals have increased by 5% since 2013, with destinations worldwide receiving 517 million international tourists in the first half of 2014 (UNWTO, 2014). This is an increase of 22 million tourists compared to 2013. It is predicted that by 2030 international tourism arrivals will increase to 1.8 billion. This trend is forecasted to increase by 3.8% per year up to 2020; increasing jobs, exports and economic growth (UNWTO, 2014). 1 in 11 jobs are tourism related and provides for 9% of Gross Domestic Product.

1 Global Overview

1.1 International Tourist Arrivals

International tourist arrivals in 2013-2014 have experienced mixed growth in key regions (see Figure 1). The graph shows that growth increased by 6% in the Americas, with all sub-regions of the Americas improving, with Mexico boosting North America, Central America and South America increasing by 6% and the Caribbean increasing by 5%. South America increased by 6% due to Brazil's Football World Cup. Europe's percentage change of tourist arrivals increased by 5% in the first half of 2014.

Figure 1:
Percentage Change of Tourist Arrivals, 2013-2014

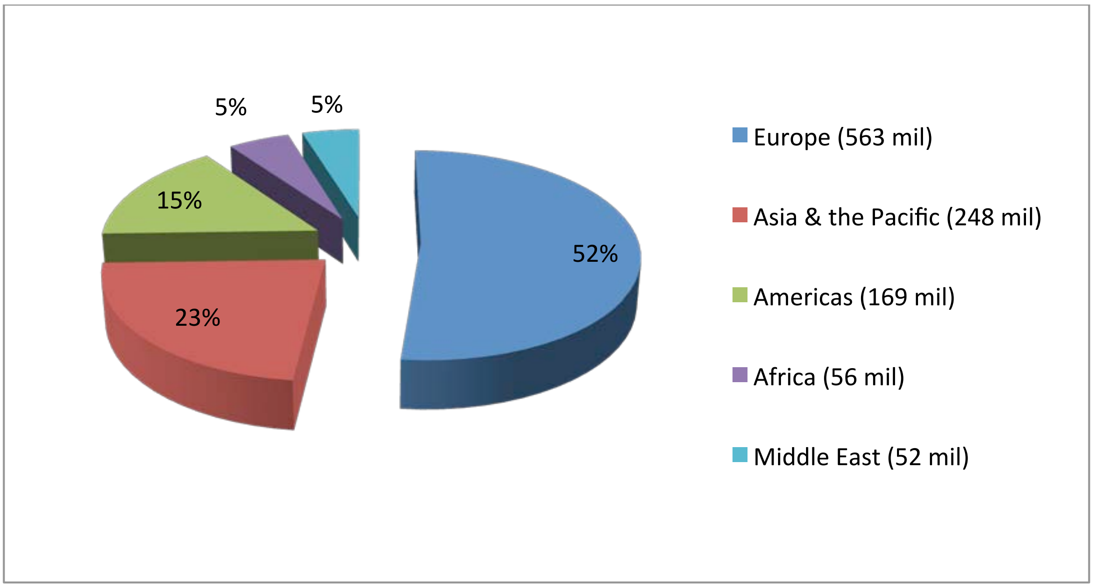


	World	Europe	Asia & the Pacific	Americas	Africa	Middle East
2013	4.8	4.8	6.5	3.4	5.6	-0.6
2014	5	5	5	6	3	-4

(Adapted from UNWTO, 2014).

Europe is the most visited region in the world and each of its sub regions has benefitted from this (see figure 2). Northern Europe's international tourist arrivals increased by 8%, with Southern and Mediterranean Europe increasing by 7%. Asia and the Pacific increased by 5%, with South Asia up by 8% and North-East Asia up by 7%. Japan, Republic of Korea and Malaysia are posting double-digit percentage growth rates. Middle East growth rates are down by 4% and Africa's growth rate has slowed from 5.6% in 2013 to 3% in 2014 due to growing concerns regarding the Ebola epidemic (UNWTO, 2014).

Figure 2:
International Tourist Arrivals, 2013

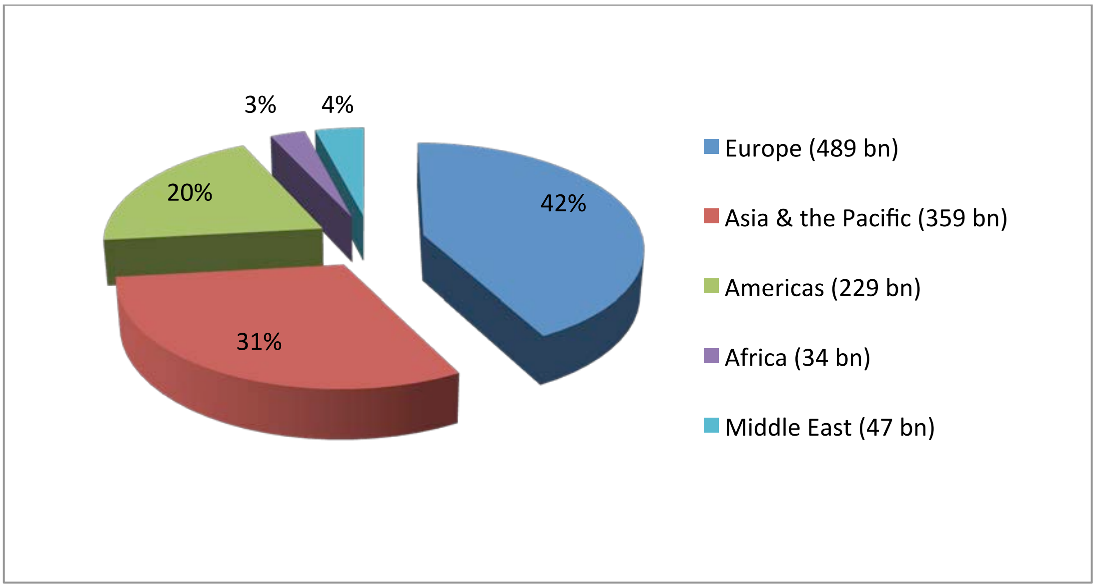


(Adapted by UNWTO, 2014).

1.2 International Tourism Expenditure

In 2013 Europe accounted for the largest share of international tourism receipts that includes earnings generated from expenditure by international tourists on accommodation, food and drink, local transport, entertainment, shopping and other goods and services (see Figure 3). Europe being the most visited region generated the highest earnings of $489 billion, comprising of 42% of the world's tourism receipts while Asia and the Pacific is the fastest growing region (UNWTO, 2014).

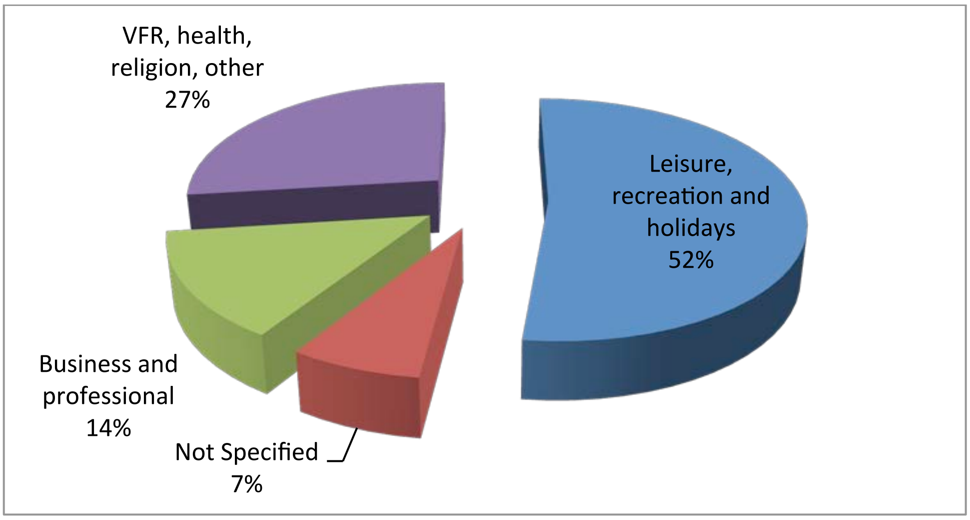
Figure 3:
International Tourism Receipts, 2013



(Adapted by (UNWTO, 2014)).

Just over half or 568 million international tourists travelled for purpose of leisure, recreation and holidays. Some 27% travelled for other reasons such as to visit friends or relatives, health treatment or religious pilgrimages, while 14% reported travelling for business and professional purposes (see Figure 4).

Figure 4:
Inbound Tourism by Purpose, 2013



(Adapted from UNWTO, 2014).

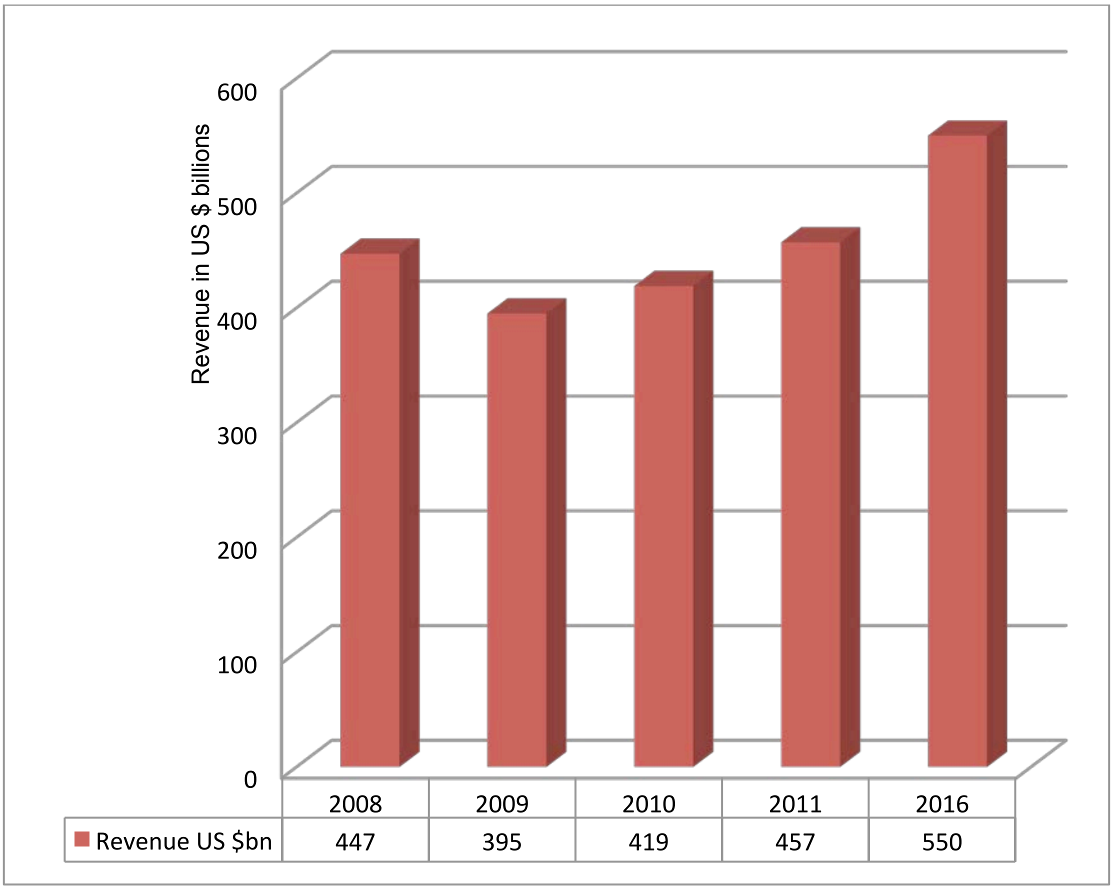
Leisure travel is outgrowing business travel. Spending on holidays has grown by 25% between 2009 and 2014 while ‘visiting family ad friends’ has grown by 17% and business travel only by 16%. Since 2009, the number of people taking city trips has grown by 47%, while tours have grown by 27%, due to more long-haul trips. In contrast, the largest segment, sun and beach holidays, only grew by 12% while countryside trips declined by 10% (ITB, 2014).

1.3 International Hotel Industry

The global hotel and resorts industry experienced a 2.5% growth in revenue for 2014. As international tourist arrivals increase due to stronger economic growth, increased customer spending and rising corporate profits, so too does the global hotel industry. The industry posted average revenue per room (RevPAR) growth of 3.8% for the first half of 2014. Table 1 outlines the hotel occupancy rates and the average revenue per room between 2009 and 2014 (Scotiabank, 2014). The Americas have seen the largest increase in hotel occupancy rate, with an increase of 19.9% between 2009 and 2014, giving rise to average revenue per room increase of $12. Europe although only seeing half as much a rise in the hotel occupancy rate at 8.7%, experienced the greatest increase in average revenue per room, with an increase of $14. Asia and the Pacific saw the biggest increase, followed by the Middle East and Africa (Scotiabank, 2014).

Figure 5 illustrates the global hotel industry revenue from 2008 and forecasted to 2016. The global hotel industry is forecasted to achieve revenue of $550 billion by 2016 with the largest contributor being the British hotel chain, InterContinental Hotels, which generated $21.6 billion in 2013 (Statista, 2014).   Marriott International and Hilton Worldwide were other major players in the international hotel sector.

Figure 5:
Global Hotel Industry Revenue, 2008-2016



(Adapted from Statista, 2014).

Table 1:
Hotels and Tourism – Industry Performance

	2009	2010	2011	2012	2013	2014 ytd
Americas						
Hotel Occupancy Rate (%)	54.7	57.8	60.1	66.8	70.2	72.6
RevPAR (US$)	54.6	58.0	62.8	61.4	62.3	66.6
Europe						
Hotel Occupancy Rate (%)	60.5	64.3	66.1	65.8	67.4	69.2
RevPAR (US$)	57.5	62.5	65.9	67.1	68.0	71.5
Asia & the Pacific						
Hotel Occupancy Rate (%)	60.6	66.7	67.9	68.0	68.0	69.0
RevPAR (US$)	72.3	85.5	87.1	86.8	83.3	81.6
Middle East & Africa						
Hotel Occupancy Rate (%)	61.3	61.3	56.8	65.8	67.4	68.3
RevPAR (US$)	93.4	94.7	92.4	86.3	90.4	94.9

(Adapted from (Scotiabank, 2014)).

1.4 Drivers of Hotel Industry's Growth

Drivers of the growth of the global hotel industry*:*

- Economic: Global GDP growth of approximately 4% over the last 10 years has contributed to increasing disposable income with an increase in the middle-class population leading to an increase in the supply of global total hotel rooms (IHG, 2014).
- Globalisation: People travel more freely around the world. International tourist arrivals have increased from 764 million in 2000 to 940 million in 2010, with a predicted 1.8 billion in 2030 (UNWTO, 2011).
- Demographic: The typical traveller demographic has changed, with varied travelling purposes, hotel expectations and with a growing ageing population with the desire and means to travel (IHG, 2014).

- Emerging markets are a driver of the growth of the global hotel industry. By the end of 2015, China and India will each have absolute year-on-year tourism growth equal to or greater than the UK, France or Japan (Deloitte, 2015).
- Technology: The internet, progressively accessed through mobile devices has increased travel planning, bookings and research. Social networking has changed how people share their travel experiences and comparison websites have impacted travel decision-making (IHG, 2014).
- Social: International travel has increased due to relaxed immigration restrictions and increased competition with airline companies; reducing air fares (IHG, 2014).
- Technological change, economic improvements as well as budget flights has set a trend to low-cost accommodation. A range of low-cost accommodation have emerged including budget hotel chains, new and improved hostels as well as other diverse private accommodation forms like AirBnb which has had over 10 million bookings to date (ITB, 2014).
- Competitors: Competitors now include not only branded or independent hotels, but also travel intermediaries and alternative lodging solutions (IHG, 2014).

1.5 European Tourism Policy

Europe is the world's primary tourist destination, with the highest density and diversity of tourist attractions. EU policy aims to promote tourism so as to maintain it as a leading destination (European Commission, 2014). EU policies and programmes that impact tourism include:

- The European Regional Development Fund (ERDF) which supports more sustainable patterns of tourism to enhance cultural and natural heritage.
- The European Social Fund (ESF) which helps to enhance the quality of employment and services within the tourism industry through education and training.
- The European Agricultural Fund for Rural Development (EAFRD) which provides support for improving the quality of agricultural products and the rural environment, and encourages tourism as a way to diversify the rural economy (Department of Agriculture, Food and the Marine, 2015).
- The European Fisheries Fund (EFF) which encourages diversification of fishery dependent areas through alternatives such as eco-tourism (European Commission, 2014).

National Overview of the Tourism Sector

National Overview

Introduction

Tourism is a very important economic sector to Ireland. In 2013, total tourism revenue for the economy was €5.7 billion (Department of Transport, Tourism and Sport, 2013). Ireland has experienced an increase of 12.3% in inbound visitors to 2,126,600 within the first half of 2014. Ireland is expected to experience its best tourism season since the downturn in 2008 (CSO, 2014). Almost all (99%) accommodation providers expect either the same or more tourists in 2015. 8 out of 10 Irish hotels expect to increase their volume of business in 2015, with 63% of guesthouses expecting increased volumes and 66% of B&BS anticipating increased business (Fáilte Ireland, 2014a). Ireland was named by the Lonely Planet as one of the top five countries in the world to visit, promoting and complimenting its landscape and hospitality (Tourism Ireland, 2014).

2 National Overview

2.1 Inbound and Outbound Tourists

The outbound and inbound tourist numbers have increased steadily from 2011 to 2014 (see Table 2). In the period April – June 2014, the total number of *trips to Ireland* increased by 12.3% to 2,126,600 - an overall increase of 233,600. The number of Irish who left Ireland to visit overseas in the period April – June 2014 was 2.2%, which is more than half the number of people from two years prior, indicating an improvement in the domestic market (CSO, 2014).

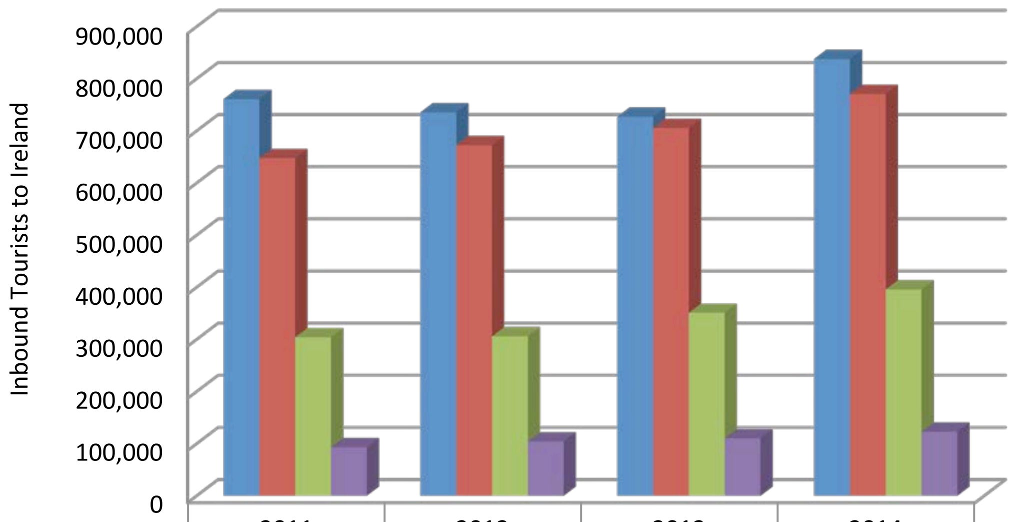
Table 2:
Inbound and Outbound tourists to and from Ireland

	Apr – Jun 2011	Apr – Jun 2012	Apr – Jun 2013	Apr – Jun 2014
Outbound	1,753,000	1,727,500	1,752,400	1,790,800
% yoy		5.2%	1.4%	2.2%
Inbound	1,805,000	1,817,300	1,893,000	2,126,600
% yoy		0.7%	4.2%	12.3%

(Adapted from CSO, 2014)

Inbound tourists from Great Britain increased by 15.2% to 837,700 and North American visitors increased by 12.8% to 395,600. Great Britain's strong sterling has had a positive impact increasing visitor spending in Ireland (Fáilte Ireland, 2014a). Figure 6 illustrates the inbound tourists from Great Britain, Europe and North America during the months April to June, 2011 to 2014.

Figure 6:
Inbound Tourists to Ireland, April-June, 2011-2014



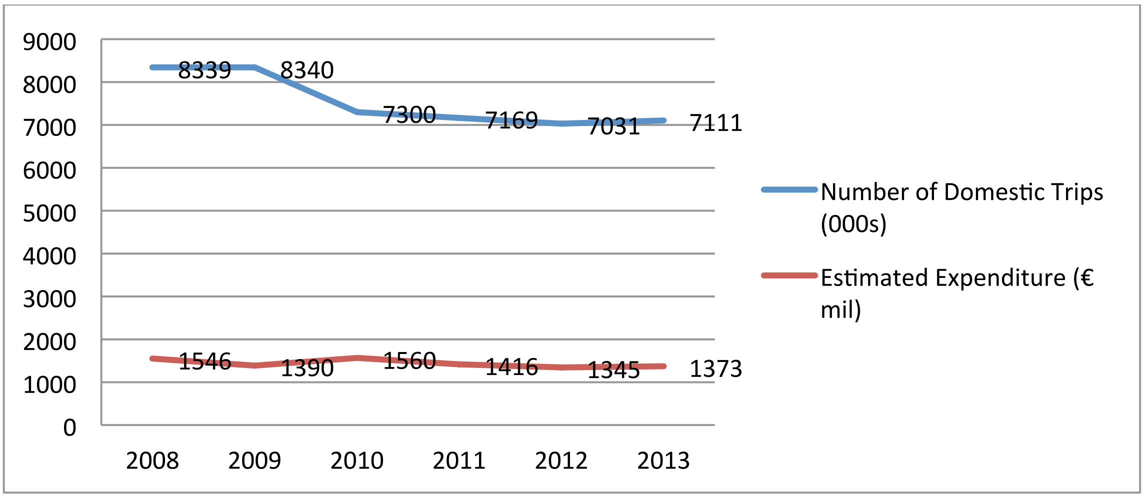
	2011	2012	2013	2014
Great Britain	760,700	735,200	726,900	837,700
Other Europe	647,500	672,400	705,200	770,600
North America	303,800	305,700	350,800	395,600
Other Areas	92,900	104,000	110,100	122,600

(Adapted from CSO, 2014)

2.2 Domestic Visitors

The first half of 2014 has given rise to a 5.2% increase in domestic trips. Almost 1.8 million Irish residents took an average of 2.6 nights, resulting in 4.6 million beds. 48.7% of these trips were holidays with 733,000 staying in hotels while the 32% were visits to relatives or friends. The total expenditure on domestic trips for the first half of 2014 accounted to €337 million, with approximately €194 million spent on holiday trips and €67 million on friends and relatives trips (Fáilte Ireland, 2014d). Figure 7 illustrates the fluctuations in the number of domestic trips and the estimated domestic expenditure for the years 2008 to 2013. Domestic trips are on the increase with total expenditure in 2013 reaching €1.3 billion (CSO, 2014a). The increase in domestic tourism is influenced by an improvement in domestic hotel deals, improved Irish weather as well as Fáilte Ireland's new Discover Ireland ad campaign (Fáilte Ireland, 2014d; Fáilte Ireland, 2014a; Fáilte Ireland, 2014f).

Figure 7:
Domestic Travel by Irish Residents, 2008-2013



(Adapted from CSO, 2014a).

As can be seen from Figure 7, domestic trips are on the rise once again, which in turn increases the expenditure. The number of people taking a holiday trip in Ireland has been on an upward trend since 2009, with 67% of Irish residents taking a holiday trip in 2013 (Fáilte Ireland, 2014g). Domestic trips longer than 4 nights have increased by 18% between 2012 and 2013 to 920,000 indicating that Irish residents are again taking longer holidays in Ireland. Shorter tips that are between 1 and 3 days long have decreased by 2% between 2012 and 2013 to 2.5 million. Similar to global travel statistics, leisure travel is outgrowing business travel in Ireland, with people visiting friends and relatives up 3% from 2012 and business travel down 11% (see Table 3).

Table 3:
Domestic Tips by Purpose of Travel (000)

	2010	2011	2012	2013
Long Holiday	1,151	1,040	780	920
Short Holiday	2,828	2,656	2,594	2,541
VFR	1,997	2,231	2,374	2,452
Business	370	350	322	341
Other	955	891	960	858

(Adapted from Fáilte Ireland, 2014g)

As a result of the slight reduction in short holiday trips, expenditure on these trips was marginally down in 2013 from 2012, but long holiday expenditure grew by 20% to €348 million. €78 million was spent on domestic business trips in 2013 while 2.5 million domestic trips to visit friends and family generated €267 million. This however, is a slight decrease of 1% from 2012 (see Table 4).

Table 4:
Domestic Revenue by Purpose of Travel (€ million)

	2010	2011	2012	2013
Long Holiday	394.2	348.6	290.9	348
Short Holiday	577.7	516.3	493.9	492.2
VFR	270.5	265.9	269.6	266.7
Business	85.9	76.9	75.5	78.4
Other	232.2	208.2	215.3	178.9

(Adapted from Fáilte Ireland, 2014g)

With 7.1 million domestic trips being taken by Irish residents in 2013, with a total estimated expenditure of €1.4 billion, signs of economic recovery are apparent. One sixth of these domestic trips were to the West of Ireland. After the South-West and Dublin, the West proves to be the third most popular region in Ireland for domestic visitors. The average length of stay in the West by Irish residents is 3.3 nights, which is the second longest after the South-West (see Table 5).

Table 5:
Number of Trips by Irish Residents on Domestic Travel (000s)

	2010	2011	2012	2013
State	7300	7169	7031	7111
West	1253	1089	1084	1168
Dublin	1116	1279	1392	1344
South-West	1622	1493	1403	1411
Midland	223	284	329	316

(Adapted from CSO, 2014a)

The region that generated the second highest amount of expenditure by domestic visitors was in the West, accounting for €265 million, after the South-West which generated €314 million. The West region of Ireland generated approximately one fifth of total domestic travel expenditure in 2013, while the Midland counties generated the least (see Table 6).

Table 6:
Estimated Expenditure by Irish Residents on Domestic Travel (€ million)

	2010	**2011**	**2012**	**2013**
State	1560	1416	1345	1373
West	297	242	235	265
Dublin	227	248	246	256
South-West	375	329	312	314
Midland	36	43	42	48

(Adapted from CSO, 2014a)

2.3 Accommodation Sector

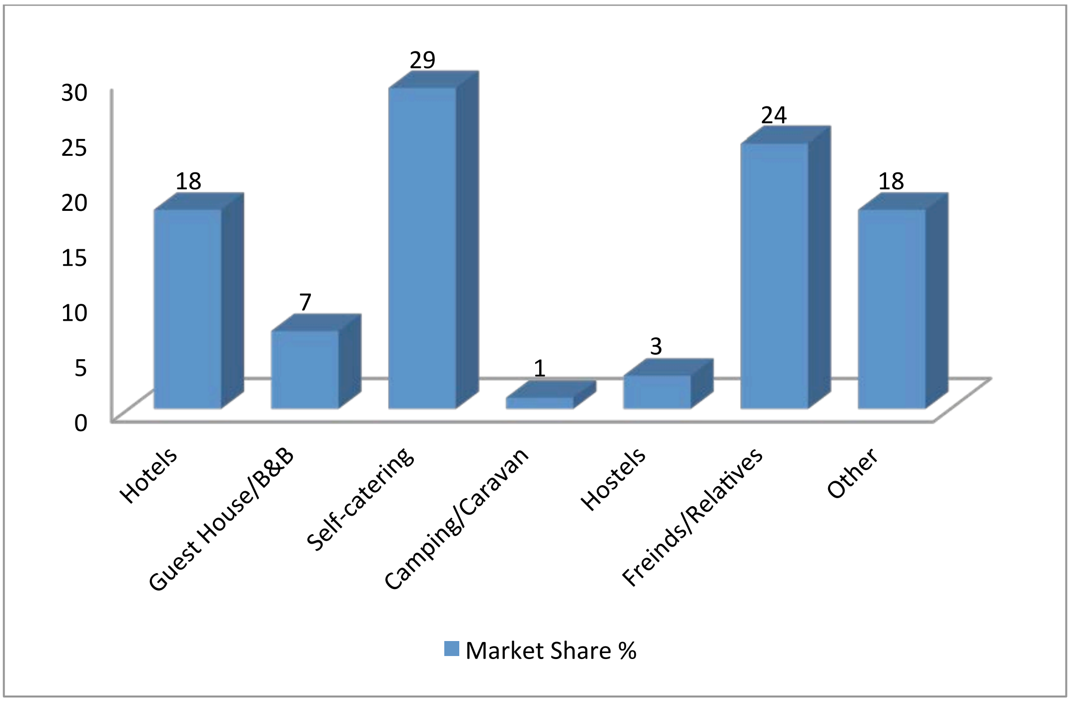
Hotels are the strongest sector within the tourism industry of Ireland, with 82% of hotels reporting an increase in visitors. Irish B&BS are also reporting positive outlooks with 60% experiencing an increase in guests during 2014 as well as 69% of guesthouses reporting a rise in guests. The retention of the 9% VAT rate is positively impacting Irish hotels, B&BS and guesthouses (Fáilte Ireland, 2014a). The reduced VAT rate applies to approximately 75% of a typical hotel's turnover (Crowe Horwath, 2013). According to most recent data, hotels have 18% of the market share within the accommodation type sector for overseas visitors to Ireland (see Figure 8) (Fáilte Ireland, 2014h). Hotels in comparison have the largest share of the market within the accommodation type sector for domestic visitors to Ireland (see Figure 9). The hotel transaction market has improved with over €350 million of hotel sales within the first three quarters of 2014, with a further €52 million sale agreed and another €173 million still on the Irish market. The total forecasted market transaction for the end of 2014 is €1 billion (Savills, 2014).

The national caravan and camping sector has also experienced positive trends with 58% of businesses within this sector seeing an increase in visitors on 2013 (Fáilte Ireland, 2014a). It only has 1% market share of the accommodation type sector for overseas visitors to Ireland (see Figure 8) (Fáilte Ireland, 2014h). The caravan and camping sector for domestic tourists holds a much larger market share than for overseas visitors at 14% (see Figure 9).

Almost two thirds of Irish hostels have seen a rise in both overseas and domestic visitors in the first half of 2014. Hostels hold a 3% share while guesthouses and B&Bs hold a 7% share of the accommodation type sector for overseas visitors to Ireland (see Figure 8) (Fáilte Ireland, 2014h). For domestic tourists, guesthouses and B&BS hold a smaller 3% of the market (see Figure 9).

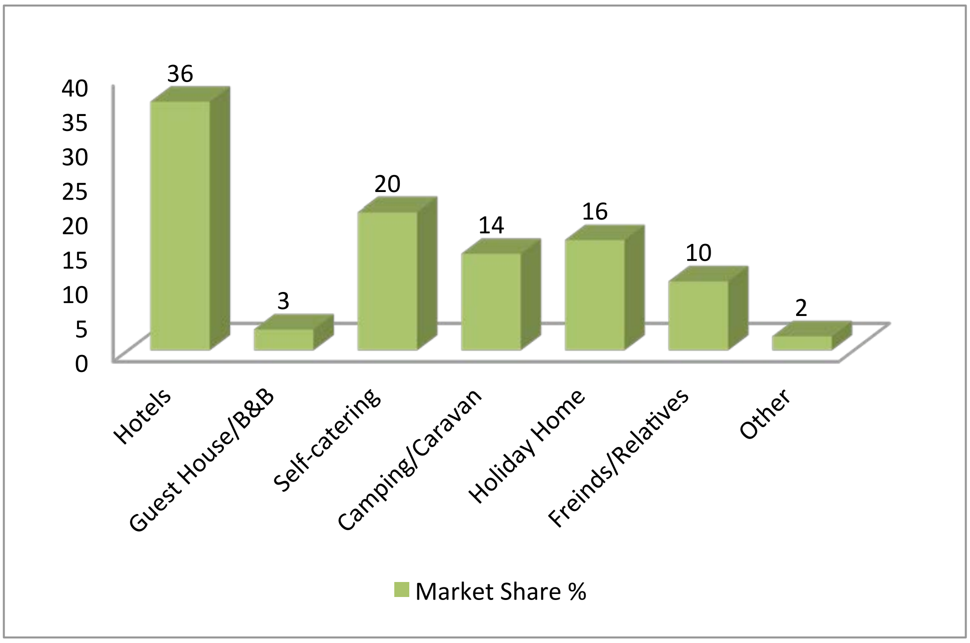
A growing trend within this sector is self-catering accommodation. This sector holds the largest share of 29% for overseas visitors to Ireland (see Figure 8) (Fáilte Ireland, 2014h). For domestic visitors to Ireland the share is also large at 20%. 16% of domestic visitors stay in a holiday home, which is up 3% from 2012 (see Figure 9).

Figure 8:
Market Share of Accommodation Type Sector for Overseas Visitors to Ireland



(Adapted from Fáilte Ireland, 2014h)

Figure 9:
Market Share of Accommodation Type Sector for Domestic Visitors to Ireland

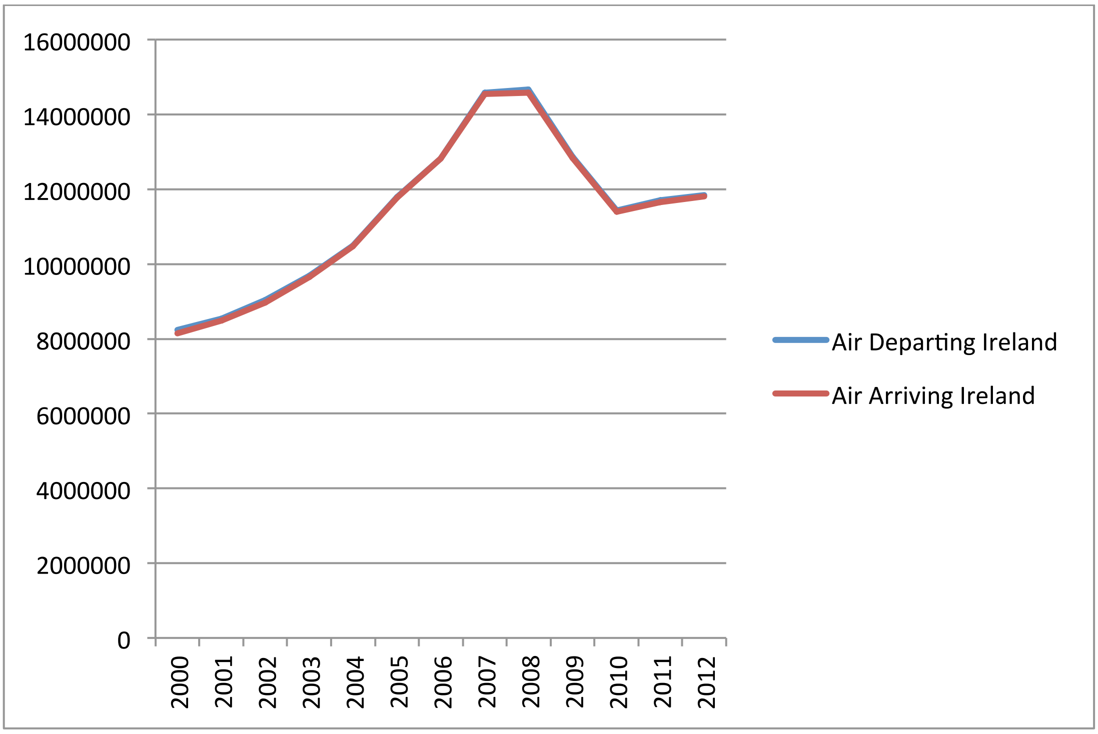


(Adapted from Fáilte Ireland, 2014h)

2.4 National Flights, Air, Sea, Bus & Rail

The increased air traffic into Ireland has positively influenced the improved levels of tourism in Ireland. The return of the San Francisco to Dublin flight, the daily Toronto to Dublin flight as well as the daily New York and Boston into Shannon flights have all positively impacted tourism in Ireland (Savills, 2013). Aer Lingus have increased the Manchester flights and Etihad recently introduced the Boeing 777-300ER increasing capacity by 30% on the Dublin – Abu Dhabi route. It was estimated that over 450,000 one-way direct air seats per week were available for the 2014 peak summer season, representing the largest volume of seats since the summer of 2008 (Soar, 2014). Figure 10 displays the fluctuating air traffic for visitors leaving Ireland and arriving in Ireland. The side effects of the economic crisis of 2008 to 2011 are displayed on the graph as is the beginning of the economic recovery in Ireland. The number of visitors arriving by air into Ireland has increased by 45% during the period, 2000 and 2012 from 8.1 million visitors to 11.9 million (CSO, 2013).

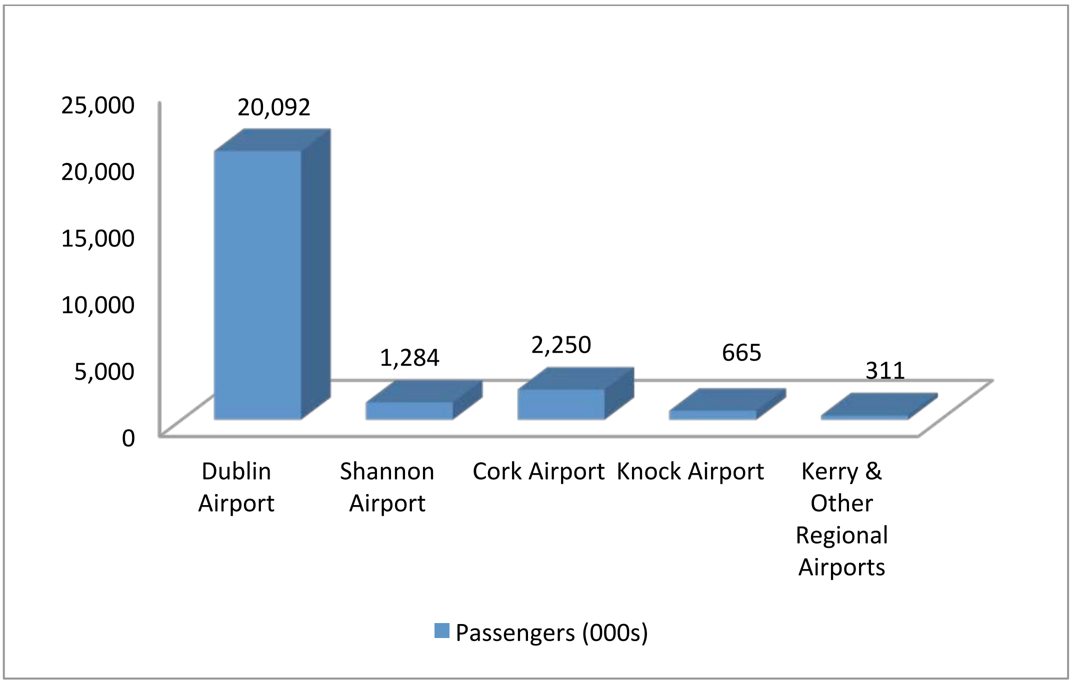
Figure 10:
International Movement of Passengers by Air, 2000-2012



(Adapted from CSO, 2013).

Dublin Airport saw over 20 million passengers in 2013 accounting for 73.6% of total inbound overseas visitors. With passenger numbers up 6% from the previous year, it was the first time the airport reached the 20 million mark since 2009 (SOAR, 2014). Shannon saw 1.28 million passengers in 2013 with Cork achieving 1.25 million (see Figure 11). According to recent sampling, Shannon's total terminal passenger numbers were 1,529,774. Of that 46% were visitors (351,848). Some 25% of these visited Galway, accounting for 87,962 passengers. Some 48% of visitors to Galway stayed in a hotel, 16% stayed in a B&B, 7% stayed in self-catering accommodation and 39% went to stay with friends or relatives (Shannon Group, 2015).

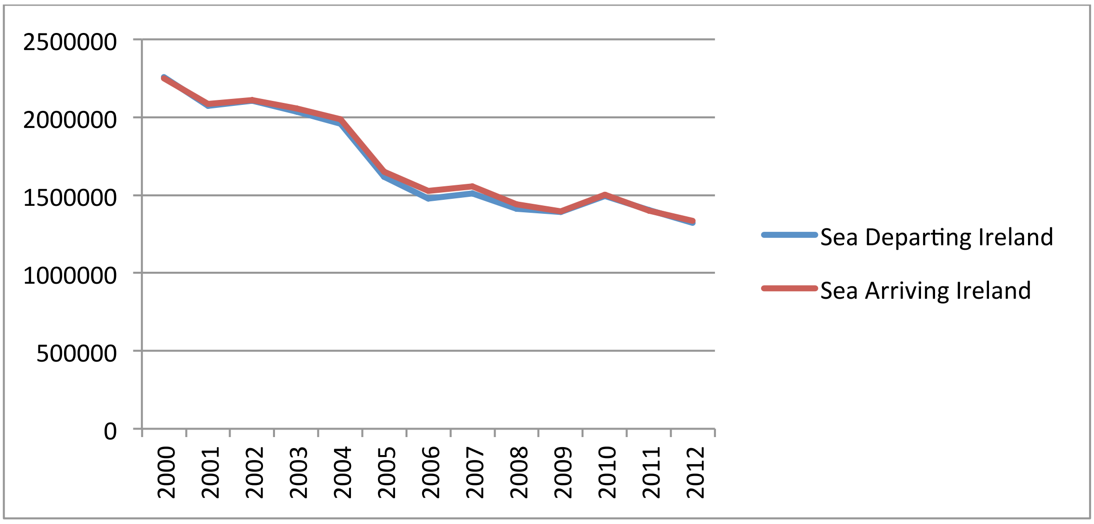
Figure 11:
Overseas Passenger by Airport



(Adapted from CSO, 2014b).

Visitors coming into Ireland arriving by sea have been decreasing steadily. From the period 2000-2012, international passengers arriving by sea into Ireland has decreased by 41%, from 2.2 million passengers to 1.3 million (see Figure 12).

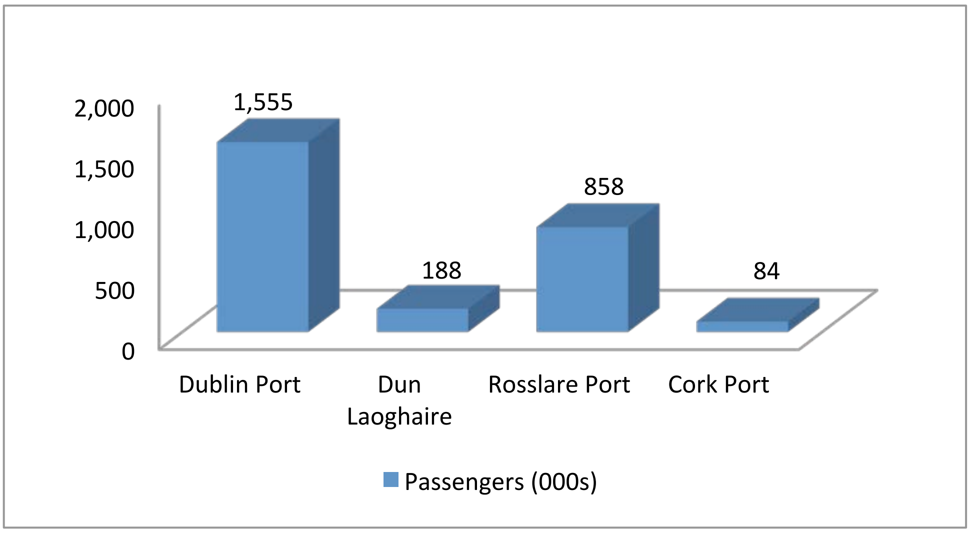
Figure 12:
International Movement of Passengers by Sea, 2000-2012



(Adapted from CSO, 2013).

Just over one and a half million passengers arrived into Ireland via Dublin Port in 2013, accounting for 5.7% of total inbound overseas visitors (see Figure 13). Rosslare Port accounted for 3.2% with 858,000 passengers, while Dun Laoghaire Port received 188,000 (CSO, 2014b).

Figure 13:
Overseas Passenger by Sea



(Adapted from CSO, 2014b).

Both Irish Rail and Bus Éireann have seen similar trends regarding total annual passengers and revenue. Both companies experienced both a drop in passengers and revenue in 2011. Irish Rail has seen an overall drop of 3.9% from 2010 to 2013, but an increase in revenue of 2.6%. Bus Éireann has seen a small increase of 1.9% in total annual passengers while seeing an 8.7% increase in revenue (see Table 7).

Table 7:
Irish Rail and Bus Eireann Annual Passenger Journeys and Revenue, 2010-2013

	2010	2011	2012	2013
Irish Rail Passengers	38.23 m	37.37 m	36.74 m	36.74 m
Irish Rail Revenue	€162.59 m	€156.65 m	€157.91 m	€166.89 m
Bus Éireann Passengers	29.13 m	28.48 m	28.63 m	29.69 m
Bus Éireann Revenue	€63.97 m	€62.66 m	€66.14 m	€69.51 m

(Adapted from National Transport Authority, 2014; National Transport Authority, 2014b).

2.5 The Overseas Markets

Due to the sharp increase in Chinese tourists into Ireland over the last few years, Tourism Ireland has launched a sales mission designed to further attract Chinese tourists to Ireland. 2012 brought approximately 17,000 Chinese tourists, 2013 brought more than 30,000 and the latest 2014 predictions have been over 50,000. The sales mission will market Ireland to China with the intension to influence the Chinese travel trade (Business ETC, 2014).

In 2013, 67% of domestic businesses report a double digit growth in German customers while businesses are reporting a 10%-14% increase in tourists from Great Britain. Visitors from Great Britain represent 42% of total overseas visitors to Ireland (see Table 8). The French market has been reported to have slowed down in the first half of 2014 but 67% of tourism businesses have reported an increase in the North American market (Fáilte Ireland, 2014a). Visitors from America represent 14.8% of total visitors to Ireland, which is the second highest percentage after Great Britain.

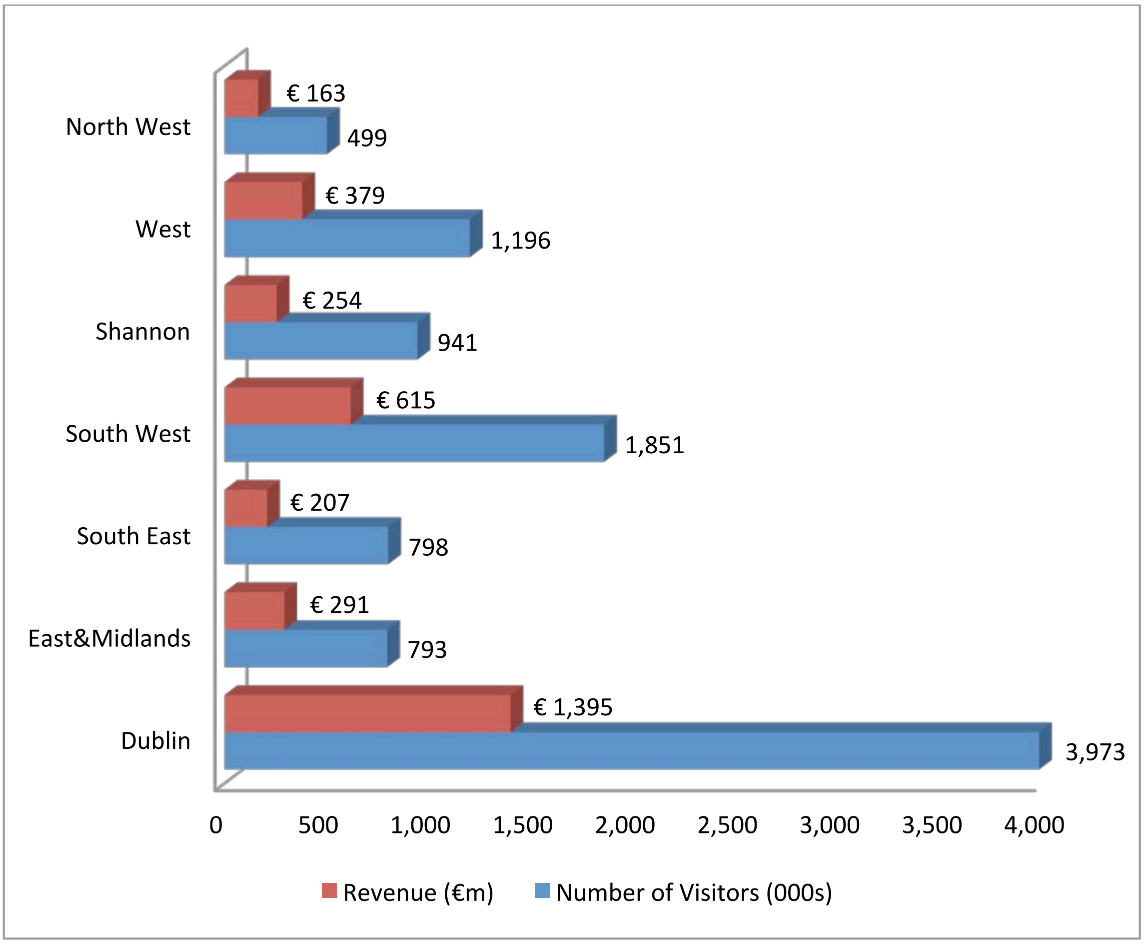
Table 8:
Overseas Trips to Ireland by Area of Residence, 2010-2013

	2010	2011	2012	2013
Total Overseas Trips	*6,037,100*	*6,505,200*	*6,517,200*	*6,985,900*
Great Britain	2,738,500	2,878,100	2,774,200	2,928,900
France	342,500	401,500	396,300	433,700
Germany	377,300	422,900	448,200	482,900
Italy	221,800	220,100	251,700	234,000
Spain	221,300	244,900	253,100	263,000
Netherlands	122,700	138,500	143,000	155,000
USA	848,300	888,600	904,200	1,035,500
Asia & Middle East	111,000	127,500	133,000	154,000

(Adapted from CSO, 2014c)

Nearly 7 million overseas visitors came to Ireland in 2013 from all across the world (see Table 8). While the majority of these visitors visited Dublin, followed by the South West, 1.2 million visited the West region of Ireland, spending nearly €380 million. The least visited region of Ireland by overseas visitors was the North West of Ireland, with just under half a million people. The region with the highest revenue generated per oversea visitor was the East and Midlands, despite attracting the fifth largest amount of overseas visitors. The West generated €317 per visitor which although generating the third highest revenue in Ireland generated the fifth highest per visitor (see Figure 14).

Figure 14:
Regional Visits and Revenue by Overseas Visitors, 2013



(Adapted from Fáilte Ireland, 2014h)

In 2013, 23% of total overseas visitors arrived in Ireland between October and December, while 18% arrived between January and March. The most popular individual month was August. For visitors arriving from Great Britain 19% arrived between January and March, while 8% arrived in April and June (see Table 9).

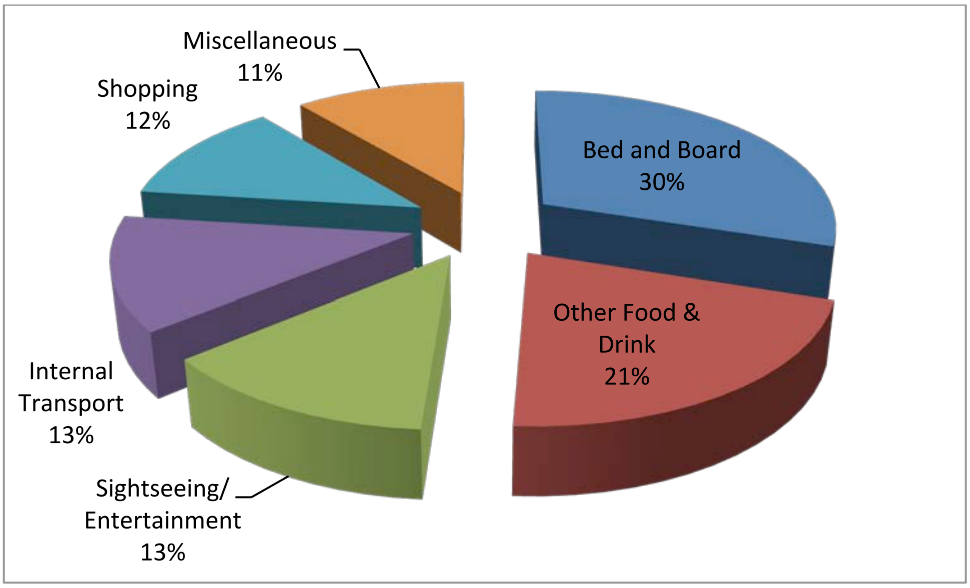
Table 9:
Time of the Year of Overseas Arrivals

Season	Total	Britain	Europe	North America
Jan-Mar	18%	19%	18%	15%
April	8%	8%	9%	7%
May	10%	9%	10%	10%
June	9%	8%	9%	13%
July	11%	10%	11%	13%
Aug	12%	13%	12%	12%
Sept	9%	9%	9%	11%
Oct-Dec	23%	25%	21%	19%

(Adapted from Fáilte Ireland, 2014h).

While bed and board accounts for almost one third of oversea visitors' spending in Ireland, 21% is spent on food and drink, while internal transport and entertainment accounts for 13% of their budget (see Figure 15).

Figure 15:
Spending Percentages of Overseas Visitors to Ireland, 2013

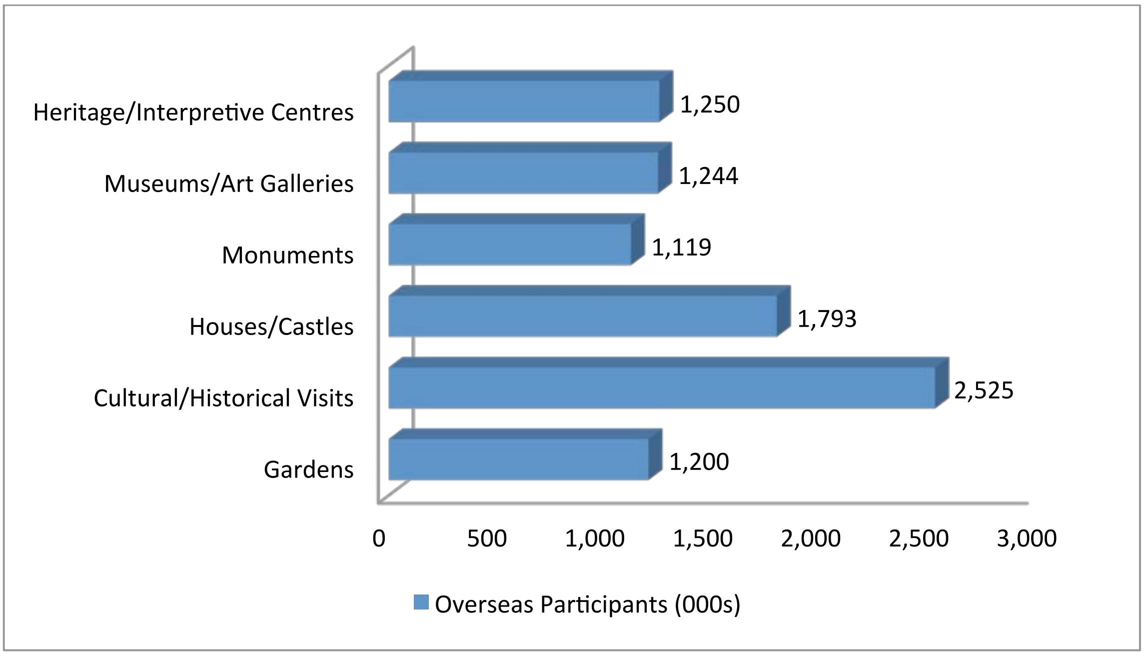


(Adapted from Fáilte Ireland, 2014h).

2.6 National Tourism Products

Many overseas tourists seek cultural and heritage attractions while visiting Ireland. Ireland has an abundance of monuments and castles of which 2.9 million tourists visited in 2013. A further 1.2 million visited various museums and art galleries while the largest proportion of tourists (2.5 million) visited cultural or historical sites (see Figure 16).

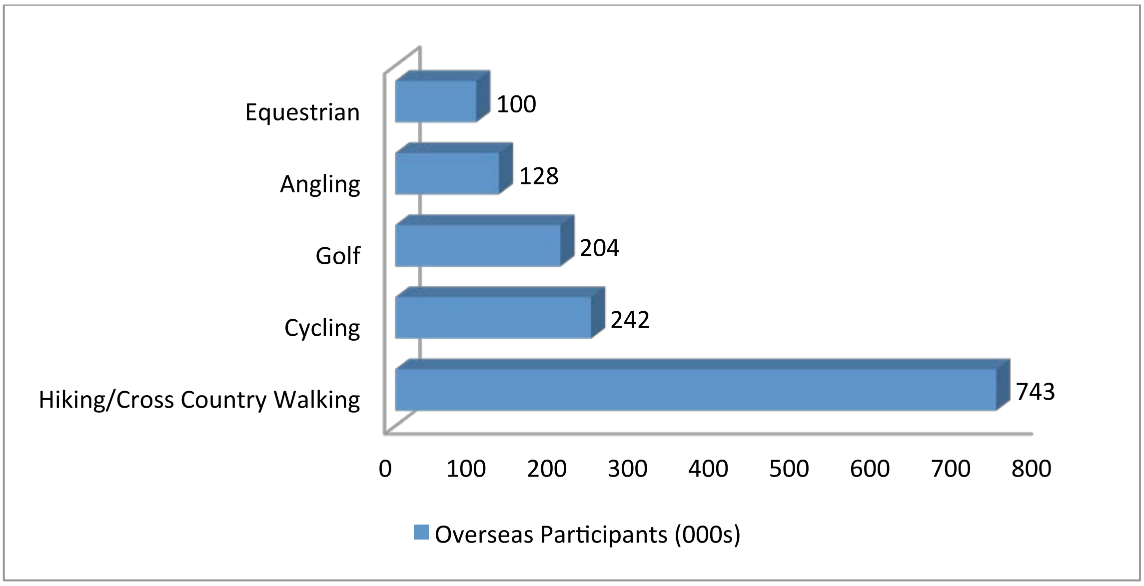
Figure 16:
Spending Percentages of Overseas Visitors to Ireland, 2013



(Adpated from Fáilte Ireland, 2014)

Other non-cultural activities that overseas visitors participate in include such outdoor activities as hiking or cross country walking, of which 743,000 participated in, in 2013, the most popular of all outdoor activities. Cycling attracted 242,000 overseas participants in 2013 and angling attracted a further 128,000. Another popular outdoor activity is golf of which 204,000 overseas visitors participated in (see Figure 17).

Figure 17:
Other Activities that Overseas Visitors to Ireland Engaged in, 2013



(Adapted from Fáilte Ireland, 2014h).

2.7 The Wild Atlantic Way

'The Wild Atlantic Way' is a 2,500 km route on the West of Ireland which is the longest defined coastal drive in the world. It was chosen as a top 'stand-up paddling' destination and will be internationally exposed in 2015 on a US TV series called 'Facing Waves' which will broadcast to over 50 million homes and syndicated to over 25 countries (Fáilte Ireland, 2014c). The route offers more than 500 visitor attractions, over 1,500 activities, 580 festivals and events, 17 trails and 50 looped walks, 53 blue flag beaches and 120 world class golf courses. The route stretches from Malin Head in County Donegal to Kinsale in County Cork passing through such regions as Connemara, Galway Bay and Kerry (Fáilte Ireland, 2014j). Since the establishment of the route, there has been a 9.4% increase in overseas visits to Ireland, compared to the previous year (CSO, 2014). It has recently won the "Best Tourist Attraction" at the third annual InBusiness Editor's Choice Awards in Dublin (Hotel and Restaurant Times, 2014).

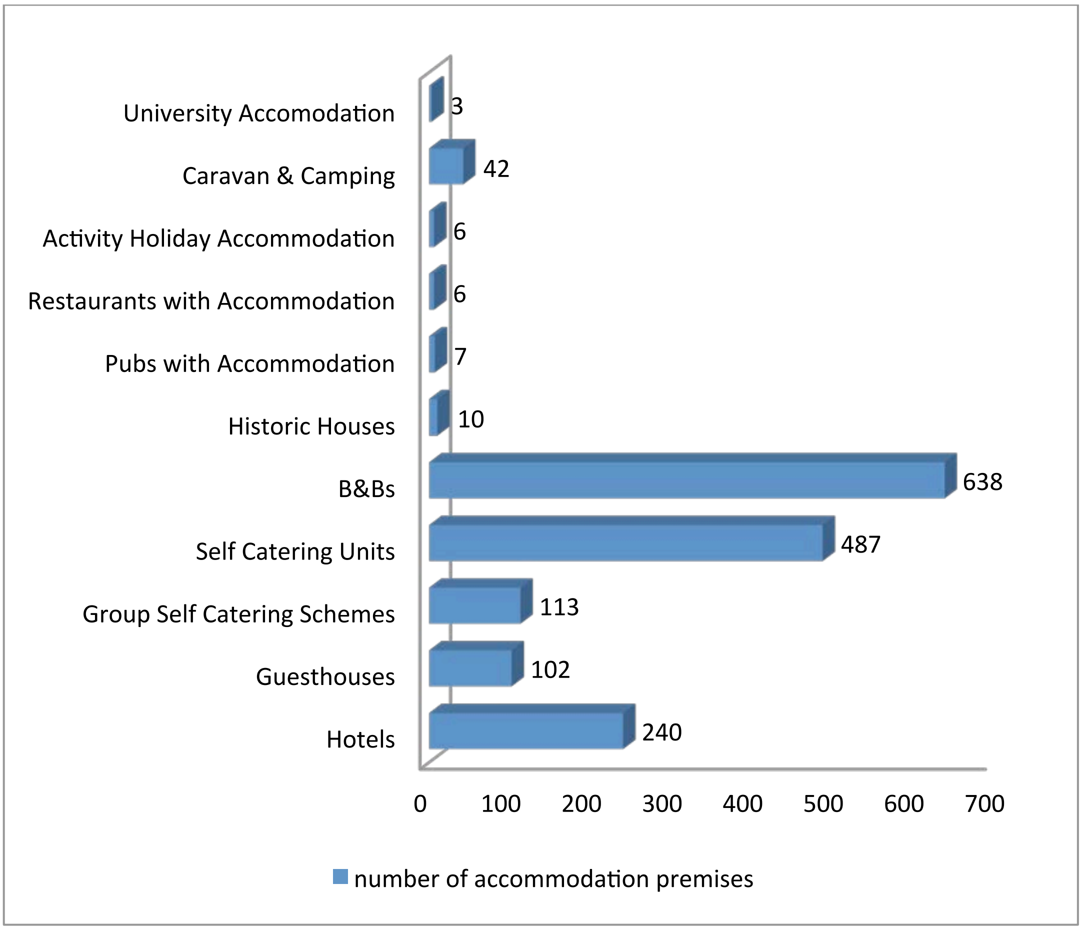
Fáilte Ireland is investing €10 million, improving roads, signposting and improving discovery points (Department of Transport, Tourism and Sport, 2014). An investment of €2.75 million was spent on designing and erecting over 4,000 'Wild Atlantic Way' signposts along the 2,500 KM route. The development of discovery points and 25 embarkation points received an investment of €4.6 million (RTÉ, 2014). Much of the remaining €10 million went towards national and international promotion through, TV, the internet and radio. A large number of foreign print and

TV travel journalists have been invited to sample the coastal route gaining a significant amount of international coverage. Fáilte Ireland has launched cinema campaigns in Germany, France and the United States to promote the Wild Atlantic Way as well as erecting 700 billboards in metro stations throughout Paris and hosting more than 800 international media from 19 different markets. A phone application has been launched to help tourists navigate and to provide updated information about local events along the route.

As well as improving existing businesses along the coastal route, like adding 'Wild Atlantic Sea Walks' as an extra activity to adventure companies, it has incentivised entrepreneurs to set up new establishments, such as 'Ger's Wild Atlantic Diner'.

The Wild Atlantic Way coastal route is home to a total of 1,654 types of accommodation. The majority of these are B&BS, accounting for 38% of total accommodation types. There are 9 five star premises, 144 four star and 497 three star. There are 487 self-catering establishments, with a five star, 303 four stars and 150 three stars. There are also 240 hotels of which five are five star, 73 are four star and 112 are three star (see Figure 18).

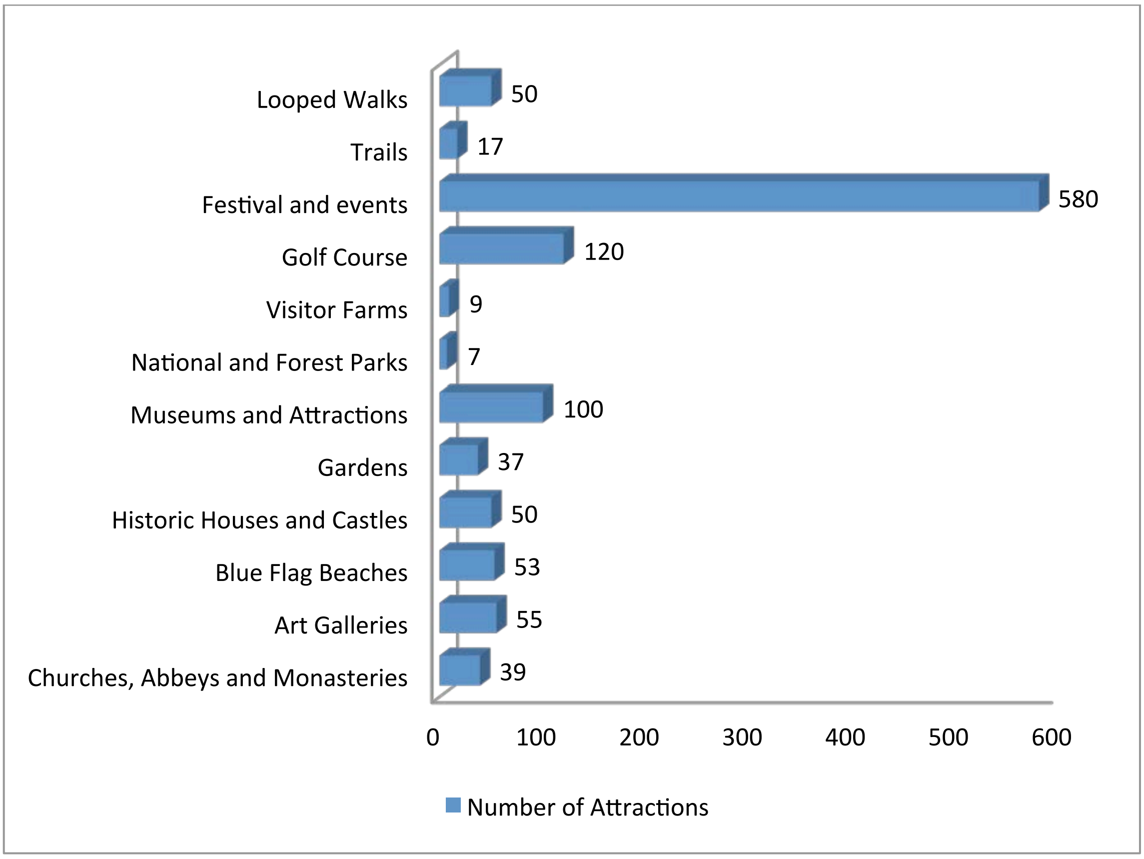
Figure 18:
Accommodation along the Wild Atlantic Way



(Adapted from Fáilte Ireland, 2014j).

There are 1117 attractions and activities along the route, including 100 museums, 55 art galleries, 53 blue flag beaches and 50 historic houses and castles (see Figure 19).

Figure 19:
Attractions along the Wild Atlantic Way



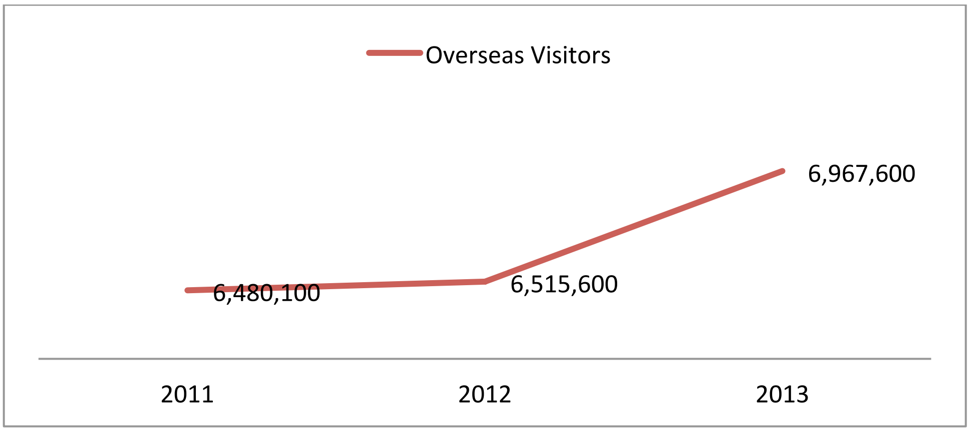
(Adapted from Fáilte Ireland, 2014j)

2.8 The Gathering

The Gathering 2013 was a tourism-led government supported initiative, driven by Fáilte Ireland. Its goal was to increase tourism in Ireland by targeting the Irish diaspora around the world. One in three Irish resident adults personally invited someone to visit Ireland in 2013 (Fáilte Ireland, 2013). The target audience for 'The Gathering' included the global diaspora population, estimated to be more than 70 million with 40 million in the United States.

The project has delivered between 250,000 and 275,000 visitors into Ireland (Fáilte Ireland, 2014e). The additional revenue generated by these tourists who would not have otherwise visited Ireland, but for The Gathering generated in excess of €170 million. The event was implemented within its budget of €13 million from the Department for Transport, Tourism and Sport and succeeded in leveraging third-party funds of an estimated €8 million (Fáilte Ireland, 2013) Overseas visitors increased by 6.9% in 2013, up from 2012, illustrating the success of 'The Gathering' (see Figure 20).

Figure 20:
Overseas Visitors to Ireland, 2011-2013



(Adapted from CSO, 2014).

According to research undertaken by IPSOS MRBI in October 2013, 77% of respondents believe that hosting a gathering is a source of civic pride in their locality and 73% believe that organising a gathering has inspired people to work together in other areas to benefit the community (Fáilte Ireland, 2013).

An original target was set of creating an additional 500 new events during 2013, working out at approximately 20 events per country. The final result exceeded this target with a total of 4,942 events. The requirement for an event was to attract overseas visitors. A total of €1.23 million was committed to funding these events, with funding amounts varying from €250,000 to €5,000. The county with the largest number of events was Longford, followed by Leitrim and Moy. Galway ranked tenth, with Kildare generating the least (see Table 10). The County with the largest number of events is regarded as having the largest ancestral diaspora (Fáilte Ireland, 2013).

Table 10:
County Ranking Showing Number of Gatherings Weighted by Population Density

Rank	County	Rank	County
1	Longford	14	Westmeath
2	Leitrim	15	Laois
3	Mayo	16	Tipperary
4	Monaghan	17	Louth
5	Sligo	18	Limerick
6	Kerry	19	Wicklow
7	Clare	20	Offaly
8	Roscommon	21	Cork
9	Donegal	22	Wexford
10	Galway	23	Dublin
11	Cavan	24	Kilkenny
12	Carlow	25	Meath
13	Waterford	26	Kildare

(Adapted from Fáilte Ireland, 2013).

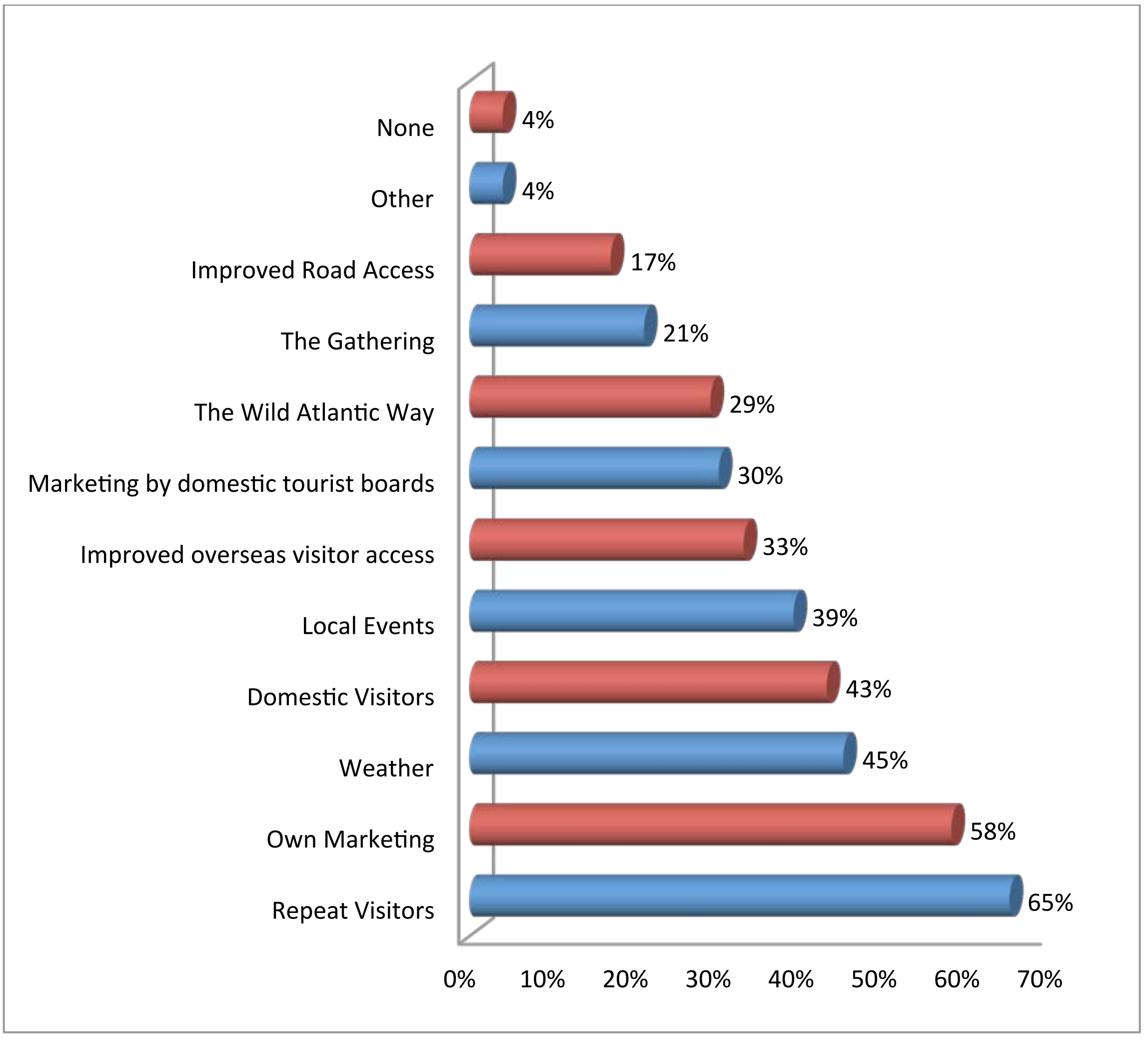
2.9 Impacts to the Food sector

Domestic restaurants have been benefitting from the increase in both overseas and domestic visitors with 72% of restaurants reporting their overseas visitor volumes to be higher in 2014 compared to the year before (Fáilte Ireland, 2014a). Self-catering operators are experiencing a lesser increase in business compared to 2013, with 44% of self-catering operators reporting an increase and 19% reporting a decrease within the first half of 2014.

2.10 Positive Factors, Concerns and Issues

The main factors that domestic tourism businesses report have influence over their increase in business are repeat visitors followed by their own marketing techniques, the weather and then the increase of domestic visitors (see Figure 21) (Fáilte Ireland, 2014a).

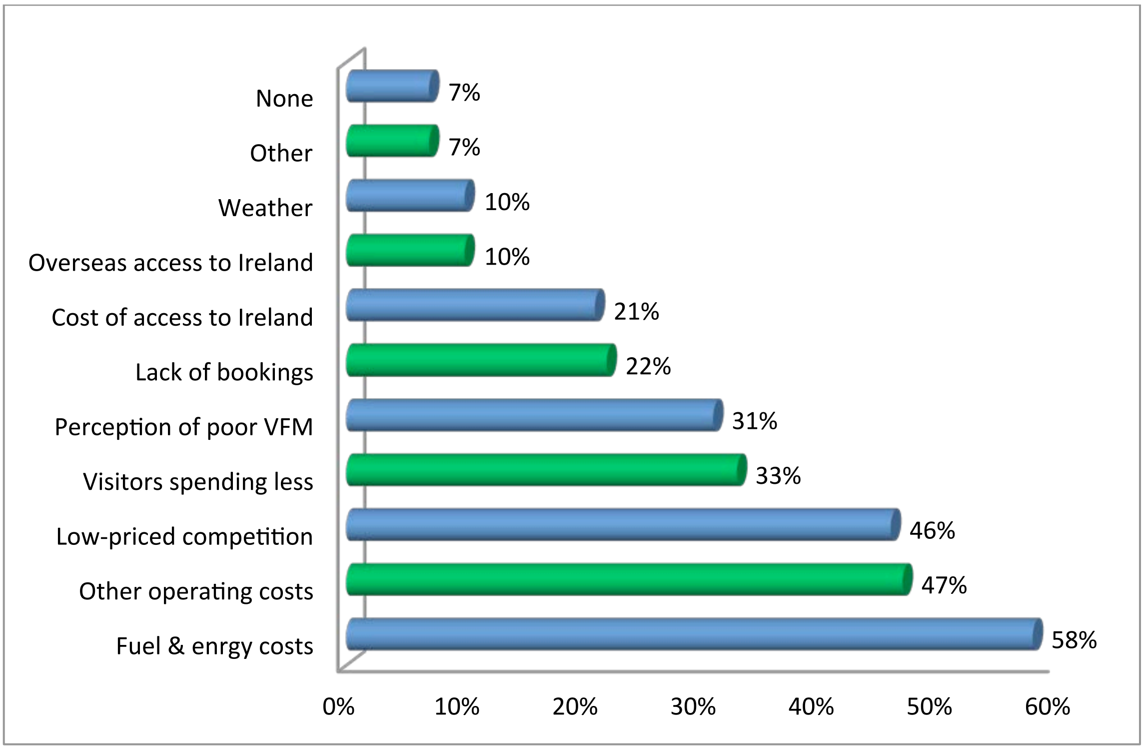
Figure 21:
Positive Factors Affecting Irish Tourism Businesses



(Adapted from Fáilte Ireland, 2014a)

In terms of issues and concerns that domestic businesses have in the tourism sector, some 58% of businesses have concerns regarding fuel and energy costs, 47% have concerns with other operating costs while 46% worry about their competitors (see Figure 22) (Fáilte Ireland, 2014a).

Figure 22:
Issues of Concern Affecting Irish Tourism Businesses



(Adapted from Fáilte Ireland, 2014h)

2.11 National Policies

Ireland has set targets for 50,000 extra jobs to be created in tourism and hospitality and €1.7 billion more in annual revenue in the new Tourism Policy which covers from 2014 to 2025 (Fáilte Ireland, 2014m). A plan has been made of bringing in multi-annual budgets for festivals, events and tourism attractions allowing organisers and managers to be able to plan ahead and invest where needed.

The central goal of the Tourism Policy is to increase revenue from overseas tourism from €3.3 billion to €5 billion per year by 2025 (Department of Transport, Tourism and Sport, 2014). A target to increase current tourism employment from 200,000 to 250,000 is a further goal.

A new fund to support capital investment in tourism will be launched in 2016, so that Ireland's tourism sector will be able to cater to the need of future visitors (Fáilte Ireland, 2014m).

Tourism Ireland will continue to market Ireland as a visitor destination. A policy to develop a Multi-Annual Financial Framework for Tourism, to provide greater stability and certainty on the level of Exchequer funding available to support tourism (Fáilte Ireland, 2014m).

Funding for festivals and events will be done on a multi-annual basis instead of annually to enable events to be able to plan ahead, to grow larger and to eventually become financially independent. A policy to allow local authorities a greater role in funding smaller tourism and diaspora-related events like The Gathering will encourage local authorities to take greater responsibility for tourism development. A focus on attracting visitors as opposed to generating publicity is an important policy regarding the development of local events (Fáilte Ireland, 2014m).

Regional and Local Overview of the Tourism Sector

Regional and Local Overview

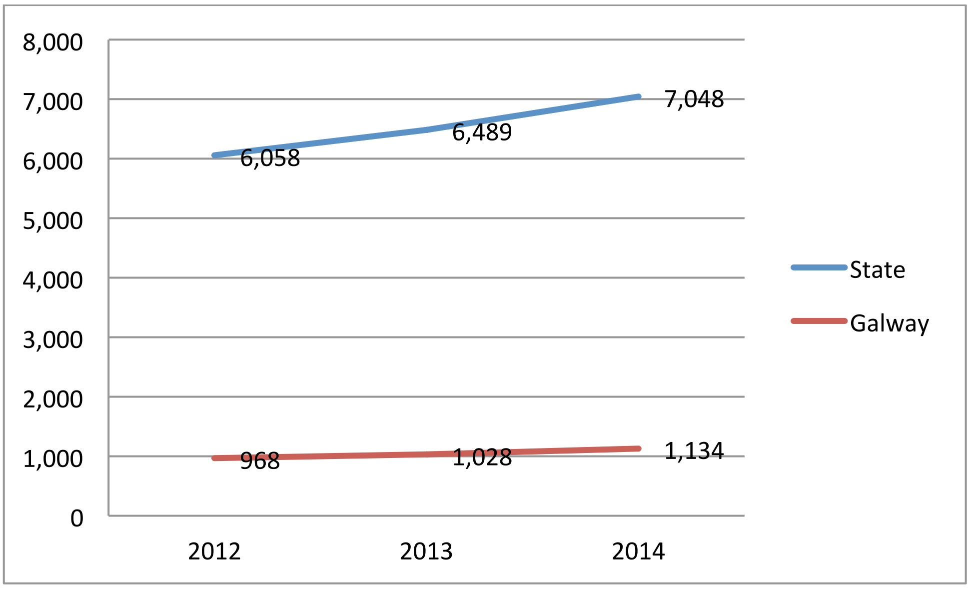
Introduction

Galway City and County experienced a tourism boom during the summer of 2014 as inbound overseas visitors increased by 10.3% compared to 2013 with local hoteliers reporting an occupancy increase of 8% (Fáilte Ireland, 2014k; Fáilte Ireland, 2013b). Galway accounted for 15.8% of total overseas visitors coming into Ireland in 2014. The total overseas visitors coming into Ireland increased by 8.6% between 2013 and 2014, while Galway's inbound overseas visitors increased at a higher rate of 10.3% between 2013 and 2014 (see Figure 23).

3 Regional and Local Overview

3.1 Regional Overseas Visitors and Revenue

Figure 23:
Total Overseas Visitors to Galway and Ireland, 2012-2014



(Adapted from Fáilte Ireland, 2014k; Fáilte Ireland, 2013b).

Galway experienced the third highest number of overseas visitors after Dublin and then Cork in both 2012 and 2013, growing at a rate of 6.2%. Cork experienced no year on year growth between 2012 and 2013. The county that experienced the lowest number of overseas visitors was Offaly, accounting for 9,000 visitors (see Table 11).

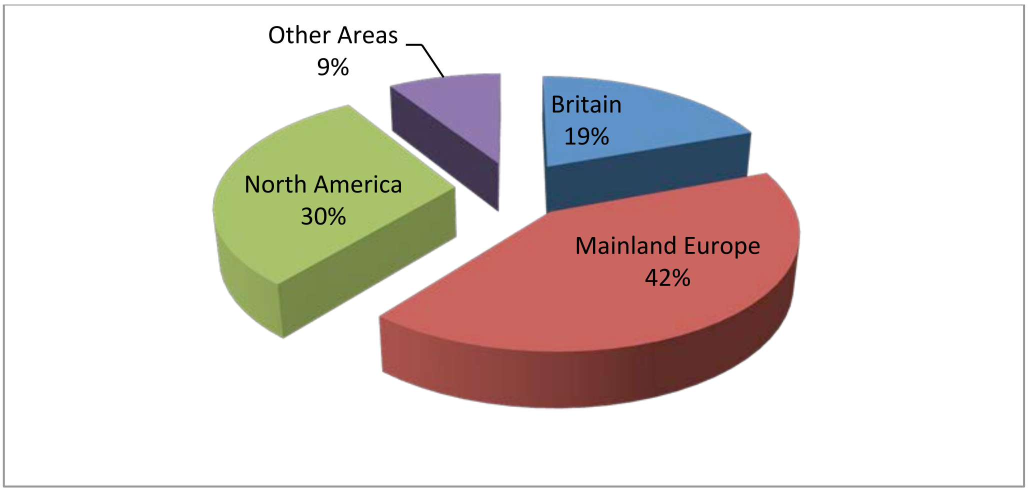
Table 11:
Regional Comparison of Overseas Visitors

Region	2012 (000s)	2013 (000s)	% Change
State	6,058	6,489	7.1%
Galway	**968**	**1,028**	**6.2%**
Dublin	3,641	3,998	9.8%
Kerry	826	877	6.2%
Sligo	129	133	3.1%
Cork	1,228	1,228	0%

(Adapted from Fáilte Ireland, 2014k; Fáilte Ireland, 2013b).

While mainland Europe accounts for a large proportion of overseas visitors into Galway, 30% of these visitors come from North America, which is a 2% increase from the previous year. Visitors from Great Britain accounted for 19% of total overseas visitors which is an increase of 1% from the previous year (see Figure 24).

Figure 24:
Origin of Overseas Visitors into Galway



(Adapted from Fáilte Ireland, 2014k; Fáilte Ireland, 2013b).

Galway attracted 178,000 visitors from Great Britain in 2012, which after Dublin was the county that attracted the largest amount of British visitors. Dublin followed by Cork attracted the largest amount of visitors from mainland Europe and North America, followed by Galway with both respective regions (see Table 12).

Table 12:
Regional Comparison of Overseas Visitors, 2012

Region	Britain	Mainland Europe	North America	Other Areas
Galway	**178,000**	**436,000**	**268,000**	**87,000**
Dublin	1,090,000	1,582,000	687,000	282,000
Kerry	177,000	320,000	272,000	57,000
Sligo	44,000	47,000	26,000	12,000
Cork	499,000	445,000	221,000	63,000
Limerick	174,000	117,000	87,000	14,000

(Adapted from Fáilte Ireland, 2013b).

In 2013, Galway attracted 199,000 British tourists, which was an increase of 11.8% from the previous year, accounting for the largest amount of tourists after Dublin. Regarding overseas tourists from mainland Europe, Galway saw a decrease of 10,000 tourists, while Kerry had 13,000 less. Dublin and Limerick in contrast both saw an increase in tourists from mainland Europe. All counties experienced an increase in North American tourists, with Galway receiving an added 6,000, Dublin receiving an added 56,000, Kerry getting 27,000, Sligo and extra 1,000, Cork added 36,000 and Limerick receiving a further 7,000 American tourists in 2013 (see table 13).

Table 13:
Regional Comparison of Overseas Visitors, 2013

Region	Britain	Mainland Europe	North America	Other Areas
Galway	**199,000**	**426,000**	**310,000**	**93,000**
Dublin	1,251,000	1,637,000	772, ,000	338,000
Kerry	154,000	307,000	333,000	84,000
Sligo	45,000	47,000	29,000	13,000
Cork	485,000	451,000	254,000	99,000
Limerick	176,000	121,000	102,000	21,000

(Adapted from Fáilte Ireland, 2014k)

Galway generated €253 million in revenue from overseas visitors in 2012, which was the third highest revenue generated after Dublin and Cork. North American visitors generated 38% of Galway's total overseas revenue in 2012. Mainland Europe accounted for €89 million followed by Britain accounting for €49 million (see Table 14).

Table 14:
Regional Revenue of Overseas Visitors, 2012 (€million)

Region	Total	Britain	Mainland Europe	North America	Other Areas
Galway	**253**	**49**	**89**	**96**	**19**
Dublin	1,267	253	547	291	176
Kerry	164	48	53	57	7
Sligo	30	12	13	5	1
Cork	399	127	142	110	19
Limerick	116	40	30	40	6

(Adapted from Fáilte Ireland, 2013b).

Total revenue generated in Galway from overseas visitors increased by 22% in 2013. The revenue of tourists from Britain increased by €2 million, while revenue generated by mainland Europe increased by €26 million. Revenue from North American visitors increased by a third in 2013 (€128 million) which was up from €96 million on the year before. This pushed Galway into second place after Dublin, for largest revenue generated by visitors from North America (see Table 15).

Table 15:
Regional Revenue of Overseas Visitors, 2013 (€million)

Region	Total	Britain	Mainland Europe	North America	Other Areas
Galway	**308**	**51**	**115**	**128**	**14**
Dublin	1,401	243	605	303	251
Kerry	183	46	56	69	14
Sligo	44	14	23	5	3
Cork	433	128	152	119	34
Limerick	135	48	37	47	4

(Adapted from Fáilte Ireland, 2014k)

3.2 Regional Domestic Visitors and Revenue

Galway attracts 10.4% of Ireland's total domestic visitors. In 2013, 739,000 Irish residents travelled to Galway. In 2012 every county except Dublin experienced a decline in domestic visitors, while every county experienced an increase in 2013. Galway attracts the third largest amount of domestic visitors after Dublin and Cork. Galway and Dublin are the only regions that have had an overall increase in domestic visitors between 2010 and 2013. Galway saw an increase of 2,000 visitors while Dublin saw an increase of 228,000 domestic visitors (see Table 16).

Table 16:
Regional Overview of Domestic Visitors, 2010 - 2013

Region	2010 (000s)	2011 (000s)	2012 (000s)	2013 (000s)
State	1,700	7,169	7,031	7,111
Galway	**737**	**686**	**651**	**739**
Dublin	1,116	1,279	1,392	1,344
Kerry	767	656	610	671
Sligo	225	193	189	182
Cork	855	837	793	740
Limerick	192	172	169	208

(Adapted from Fáilte Ireland, 2013b).

Galway generated €148 million from domestic spending in 2013, which was third highest after Dublin earning €196 million and Kerry making €187 million. Every county in Ireland except Dublin generated less from domestic expenditure in 2013 compared to 2010. Galway made €4 million less in 2013 compared to 2010, while Kerry made €27 million less. Although Dublin has made an overall increase since 2010, it is the only country to make less in 2013 compared to the previous year. Dublin made €21 million less in 2013 compared to 2012 while Galway €10 million more (see Table 17).

Table 17:
Regional Revenue of Domestic Visitors, 2010 - 2013

Region	2010 (€m)	2011 (€m)	2012 (€m)	2013 (€m)
State	1,560.5	1,415.9	1,345.4	1,373.2
Galway	**152**	**134**	**138**	**148**
Dublin	187	194	217	196
Kerry	214	165	158	187
Sligo	61	37	34	39
Cork	208	184	162	138
Limerick	48	26	24	31

(Adapted from Fáilte Ireland, 2014k)

3.3 Regional Accommodation Sector

The number of registered hotels has decreased across the State during the period of 2008 to 2013. The number of hotels in the West has decreased by 7% (10 hotels) while in Dublin there was only a reduction of 3 hotels. The South East saw the largest reduction in registered hotels at 13 or 11% (Fáilte Ireland, 2012c).

Table 18:
Number of Registered Hotels by Region, 2008-2013

Region	2008	2009	2010	2011	2012	2013
Dublin	154	160	159	157	154	151
East & Midlands	124	130	124	119	114	113
South East	112	112	111	105	104	99
South West	163	166	163	161	157	153
Shannon	90	92	90	88	83	81
West	144	148	145	141	137	134
North West	107	107	110	112	107	104

(Adapted from Fáilte Ireland, 2012c)

All regions of Ireland saw an increase in the number of beds sold in hotels except Shannon which saw a drop of 144 and the South West which saw a decrease of 167 bed nights. The West region of Ireland saw a slight increase of 3 bed nights while Dublin saw and increase of 269 beds. The East and Midlands region saw the largest increase in bed nights between 2011 and 2012 with an increase of 333 bed night sold (see Table 19).

Table 19:
Number of Bed Nights Sold, 2011-2012

Year	Dublin	East & Midlands	South East	South West	Shannon	West	North West
2011	7,334	1,537	1,885	4,034	1,686	2,645	1,702
2012	7,603	1,870	2,013	3,867	1,542	2,648	1,802

(Adapted from Fáilte Ireland, 2012c)

After Dublin and the South West, the West region of Ireland has the largest accommodation capacity for hotels in Ireland totalling 6,920. The West has the second largest number of B&B and guesthouse capacity after the South West and the third largest capacity with hostels. The

West has the third largest capacity with hostels at 1,302 with Dublin having the highest capacity followed by the South West (see Table 20).

Table 20:
Accommodation Capacity by Region, 2013

Type	Dublin	East & Midlands	South East	South West	Shannon	West	North West
5* Hotels	1,492	527	246	935	254	227	95
4* Hotels	7,821	3,441	2,631	4,381	1,465	3,074	2,621
3* Hotels	8,343	2,086	2,154	4,009	2,947	3,139	2,333
2* Hotels	770	352	195	321	319	383	360
1* Hotels	104	24	81	52	22	97	61
Total Hotels	18,530	6,430	5,307	9,698	5,007	6,920	5,470
Guesthouses & B&Bs	953	948	1,194	2,957	1,160	1,824	979
Self-catering	63	122	350	1,798	640	216	310
Hostels	3,055	450	284	2,016	794	1,302	523

(Adapted from Fáilte Ireland, 2013b)

Galway is showing positive revenue per available room (RevPAR) growth with Galway's RevPAR up 6% to €45.02 with an occupancy percentage of 67.4% as of 2013. Galway saw an increase of 3.5% up from 2012 in its hotel occupancy percentage in 2013. The average hotel room rate (ARR) in Galway increased by 2.4% from €65.15 to €66.75. The RevPAR in Galway increased by 6% in 2013. Limerick in contrast saw a decrease of 1.3% in the percentage occupancy of its hotels (see Table 21).

Table 21:
Accommodation Used by Overseas Visitors, 2012, 2013

2012	Cork	Galway	Limerick	2013	Cork	Galway	Limerick
Occupancy %	65%	63.9%	57.4%	**Occupancy %**	71.7%	67.4%	56.1%
ARR €	€66.37	€65.15	€49.78	**ARR €**	€68	€66.75	€50.43
RevPAR €	€44.22	€42.32	€28.27	**RevPAR €**	€48.75	€45.02	€28.27

(Adapted from Savills, 2013).

Due to the vibrant culture, numerous festivals and spirited art scene, tourists from all over the world are attracted to Galway (Savills, 2013). Galway hoteliers are reporting a positive outlook for the future of their businesses. Over 65% of owners plan to invest more into marketing while 77% plan to invest more into refurbishment and product development. Some 42% of hotel owners are planning to increase their staff over the next year (Savills, 2013).

The reduced VAT rate has resulted in creating an additional 1,203 new direct jobs in Galway within the tourism, food and hospitality sector. The gross annual wage paid to these additional workers in Galway is €27.5 million (Restaurants Association of Ireland, 2014). The sale of Galway's Clayton Hotel to Dalata Hotels contributes to Ireland's total hotel sales projection of €1 billion (Competition and Consumer Protection Commission, 2015).

In the West of Ireland (Galway, Roscommon, Mayo) as well as the South West, overseas visitors most often use hotels as a preferred accommodation type. Some 36% of overseas tourists used hotels in the West region of Galway in 2012. Guesthouse and B&B use are of the most popular accommodation type in the West as are hostels. Compared to other regions in Ireland, the smallest percentage of visitors stayed with friends or relatives in the West. In contrast 50% of visitors stayed with friends or relatives in the East and Midlands. The least popular form of accommodation is caravans and camping with only 2% of visitors camping in the West in 2012 (see Table 22).

Table 22
Accommodation Used by Overseas Visitors, 2012

Accommodation (%)	East & Midlands	South East	South West	West	North West
Hotel	25	33	40	36	29
Guesthouse/B&B	13	22	23	27	21
Rented	4	4	7	4	4
Caravan & Camping	2	2	1	2	2
Hostel	3	2	6	10	5
Friends/Relatives	50	34	24	21	35
Other	4	4	3	4	4

(Adapted from Fáilte Ireland, 2013b).

The West saw a decrease in accommodation preference in 2013, with 34% of overseas visitors choosing a hotel compared to 36% in 2012. Every other region in Ireland saw an increase in hotel type accommodation. The West also saw a drop in guesthouse and B&B choice as well as hostel preference among visitors. This is due to an increase in both rented accommodation as well as 2% increase in visitors staying with friends or relatives.

Table 23:
Accommodation Used by Overseas Visitors, 2013

Accommodation (%)	East & Midlands	South East	South West	West	North West
Hotel	27	37	45	34	31
Guesthouse/B&B	12	22	23	25	20
Rented	3	2	6	5	5
Caravan & Camping	1	2	1	2	2
Hostel	1	2	6	9	2
Friends/Relatives	50	32	21	23	34
Other	4	3	4	4	7

(Adapted from Fáilte Ireland, 2014k).

There are 53 bed and breakfasts in Galway County and City with 14 in Galway City and 39 in the county (see Table 24).

Table 24:
B&Bs in Galway City and County

B&B	Location	B&B	Location
Rockmount House	Clifden	Sli Na Mara	Galway City
Kingstown House	Clifden	Carraig	Galway City
Ardawn House	Galway City	Petra House	Galway City
Springlawn	Clarinbridge	Deacys	Galway City
Loughcutra House	Gort	High Tide	Galway City
Tullyvrick	Oughterard	Woodlands	Kinvara
Ardmor	Spiddal	Camillaun Lodge	Oughterard
Hillview	Oranmore	Ballykine House	Clonbur
Prague House	Galway City	Lisnagree	Galway City
Bay View	Clifden	Inishmore House -	Galway

Seashore Lodge	Salthill	All The Twos	Clifden
Tullaleagan	Oughterard	Grasshopper Cottage	Corr Na Mona
Cartron House	Loughrea	Carrown Tober House	Oughterard
Auburn House	Galway	Atlantic View	Clifden
Rock Lodge	Galway City	Ivy Rock House	Connemara
Riverwalk House	Oughterard	Ocean Villa	Clifden
Mountain View	Oughterard	Waterfront Rest	Clifden
Karaun House	Clarinbridge	Naomh Colman -	Gort
White Heather House	Connemara	Ardmore House	Clifden
Clochard	Galway City	Castle View House	Oranmore
Darcys	Galway City	Wits End -	Roundstone
Eriu Lodge	Moyard	Acorn House	Galway City
Fuchsia House	Renvyle	Winacre Lodge	Galway City
Abbey View	Galway City	Cornerstones	Connemara
Hillside Lodge	Clifden	Island View House	Roundstone
Sea Breeze Lodge	Salthill	Glenariff	Salthill
Murrays	Portumna		

(Adapted from Irish B&B, 2015).

3.4 Regional Flights and Bus

With Galway City being less than 90 km from Knock airport and less than 85 km from Shannon airport this makes for easy access for international tourists to visit Galway. With 837,700 visitors from Great Britain visiting Ireland in 2014, Tourism Ireland has helped increase the marketing of airfares from Manchester and Birmingham to Knock within the UK media (CSO, 2014).

Both Galway and Sligo airports were forced to close during 2011 due to a huge drop in commercial passengers. Galway airport experienced a 57% drop in passengers between 2010 and 2011 (CSO, 2014d). Galway airport has recently reopened however, to commercial flights. The first commercial jet, under the new licence, arrived on the 13th January 2015 from Stuttgart in Germany. The airport has obtained a new aviation licence and a fuel licence, from the IAA. The airport is being operated under licence from Galway County Council and Galway City Council until May 2015 by Carnmore Aviation Ltd, a company owned by the Conneely Group in Ballinasloe (Galway Airport, 2015).

Connemara airport has had a steady increase in commercial passengers since 2008, apart from a slight drop in 2011. Since 2008, it has seen an annual increase of 912 passengers (see Table 25).

Table 25:
Regional Airports

Airport	2008	2009	2010	2011	2012	2013
Connemara	19,442	18,869	19,612	17,966	19,490	20,354
Cork	3,259,109	2,767,776	2,422,872	2,356,629	2,333,643	2,252,636
Donegal	65,539	50,761	46,825	38,309	29,226	33,768
Dublin	23,507,205	20,507,446	18,426,823	18,749,078	19,090,781	20,148,574
Galway	266,473	195,804	154,814	67,002		
Inishmore	10,628	9,872	11,650	10,629	12,126	12,393
Kerry	426,115	356,738	383,866	310,937	286,442	306,042
Shannon	2,956,327	2,579,676	1,531,309	1,364,831	1,286,139	1,308,242
Sligo	42,493	26,706	21,077	7,111		
Waterford	144,253	110,826	103,986	81,575	77,875	28,168

(Adapted from CSO, 2014d).

Some 12.3% of journeys by Bus Eireann were made to Galway in 2012, which are approximately half as many trips as Dublin receives. The number of journeys made by Bus Eireann increased by 0.7% in 2013, while they decreased by 0.3% in Dublin (see Table 26). Bus Eireann employs 360 staff in the West and contributed in excess of €40 million in 2014 to the West economy (Bus Eireann, 2015).

Table 26:
Bus Eireann Annual Percentage Split of Passenger Journeys, 2013

Airport	Dublin	Cork	Galway	Limerick	Waterford
2012	23.7%	33.2%	12.3%	10%	2.9%
2013	23.4%	34.7%	13%	9.5%	2.9%

(Adapted from National Transport Authority, 2014).

Just over half of overseas coach tourists visit the West, with Dublin and the South West being the most popular. With a total of 294,000 coach tourists visiting Ireland in 2013, 155,820 visited the West (see Table 27).

Table 27:
Regional Coach Tourism, 2013

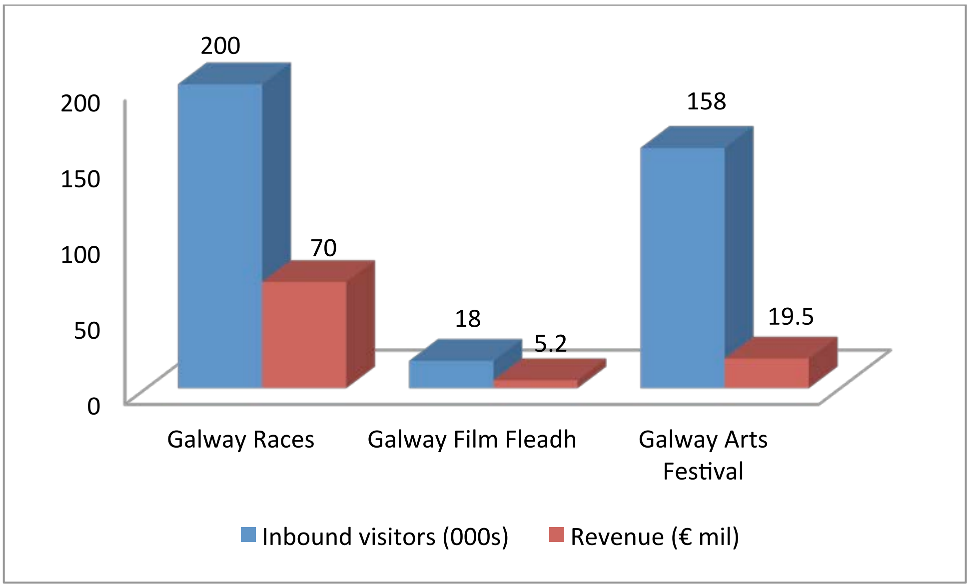
Regions Visited %	Total	Britain	North America	Mainland Europe	Other area
Dublin	85	47	91	85	94
East & Midlands	10	15	12	7	6
South East	35	36	35	31	37
South West	73	42	79	63	92
Shannon	38	10	50	29	38
West	53	14	54	57	71
North West	13	5	15	16	9

(Adapted from Fáilte Ireland, 2013c).

3.5 Festivals and Events

Galway is famous for being the festival capital of Ireland, hosting 122 festivals and events for the year 2015 (Galway Tourism, 2015). The continuing increase in inbound visitors to Galway is influenced by the range of festivals and events including Film Fleadh, The Galway Races, The Galway International Arts Festival and The Galway International Oyster and Seafood Festival. Festivals are underpinning Galway's tourism. The Galway Races attract between 170,000 and 200,000 people annually and generates between €50 million and €70 million. The Galway Arts Festival generated €19.5 million in 2010, bringing in 158,000 people. The Galway Film Fleadh brought in 18,000 people in 2010, generating €5.2 million for the local economy. Attendances at festival and events by overseas visitors in 2010 were approximately 443,000 (Fáilte Ireland, 2012). Figure 25 illustrates the popularity and estimated revenue generated by some of Galway's festivals.

Figure 25:
Estimated Revenue and Visitors of Three Galway Festivals, 2010



(Estimated Revenue).

In order for these festivals to operate, substantial funding is required. Funding is allocated by Failte Ireland for festivals all over Galway and Ireland as well as from the Arts Council, from sponsorship and from local authority funding. Funding invested in the National Festivals Programme for 2015 amounts to €2.265 million, which in turn can generate large returns. Some €3.7 billion was generated in revenue from Irish festivals in 2013, which was a 10.9% increase from the previous year (Merrion Street, 2015). The Galway International Arts Festival alone costs €2.5 million to produce relying on several grants and sponsorships. Table 24 illustrates the funding allocated by Failte Ireland for Galway festival in 2015. The Galway International Arts Festival has the greatest expensive to produce and therefore receives the most funding. The Galway Film Fleadh receives €30,000 in funding from Failte Ireland while the Film Fleadh receives €20,000 (see Table 28).

Table 28:
Galway Festival Funding from Failte Ireland, 2015

Festival	Funding
Galway Film Fleadh	€ 20,000
Galway Oyster Festival	€ 30,000
Galway Intetrnational Arts Festival	€ 227,000
Clifden Arts Festival	€ 7,000
Galway Food Festival	€ 5,000
Connemara Mussel Festival	€ 5,000
Arainn Ceilteach	€ 3,000
Connemara Bog and Connemara Sea Week	€ 3,000
Tour de Connemara	€ 2,500
Connemarathon	€ 2,500
Irish Oir Festival	€ 2,000
Cruinniu na mBad	€ 2,000
Inishbofin Island Festivals	€ 2,000
Baboro	€ 2,000
Sugar Beat Festival	€ 1,000

(Adapted from Murphy, 2015; Kyne, 2015; GIAF, 2015; Merrion Street, 2015).

3.6 Tourism Attractions

There are 35 heritage sites, 31 museums and 10 art galleries in Galway City and County. Galway's Dún Aonghasa, Aran Island's heritage site, was awarded the Silver Merit Award of Excellence 2013 (OPW, 2013). These sites attract many overseas visitors and generate income for the economy. An initiative granting all OPW heritage sites free access on the first Wednesday of every month has helped stimulate interest in Galway's and Ireland's built heritage. Table 29 displays the number of visitors to Galway's heritage sites during the years 2009-2011. Athenry Castle attracted some 9,303 visitors in 2011, Dún Aonghasa attracted 107,244 and Dunguaire Castle saw 16,464 visitors (Houses of The Oireachtas, 2012).

Table 29:
Number of Visitors to Galway's Heritage Sites and Attractions

Site Name	2009	2010	2011
Athenry Castle	8,944	11,504	9,303
Aughnanure Castle	26,555	23,976	21,825
Dún Aonghasa	107,667	109,351	107,244
Pearse's Cottage	5,064	6,194	5,609
Portumna Castle	15,393	15,428	14,073
Connemara National Park	136,495	141,922	202,543
Galway City Museum	41,784	50,755	80,491
Dunguaire Castle	18,611	13,772	16,464
Coole Park	11,602	12,923	15,241
Rathbaun Farm	9,000	8,500	9,000
Patrick Pearse's Cottage	5,064	6,194	5,609
Kiltartan Gregory Museum	600	575	652
Dartfield Horse Museum and Heritage Centre	600	500	450

(Adapted from Houses of The Oireachtas, 2012; Fáilte Ireland, 2012).

3.7 Regional and Local Tourism Activities

Some 167,464 overseas tourists visited Connemara National Park in 2012 (BMW Regional Assembly, 2014). Connemara also boasts many different walking trails as well as a 16km mountain bike trail (Derroura Mountain Bike Trail). Other attractions include Portumna Forest Park, Monivea, New Village Forest, Lackavrea, Clonbur Wood, Cong Forest and Ard Na Gaoithe (BMW Regional Assembly, 2014).

As part of the Wild Atlantic Way development plan, a €403,000 allocation has been given towards the first phase of a Galway Greenway. It will be used as a walking and cycling trail and will run through central Connemara, linking Oughterard to Clifden (Fáilte Ireland, 2014l). The success of the greenway route in Mayo which attracted more than 200,000 visitors in 2013, generating an estimated €7 million annually (Rothery, 2013), inspired the development of Connemara's greenway route which will run 76km along a disused railway line with plans to eventually continue it all the way to Galway. When completed the Connemara Greenway will be the longest off-road walking and cycling trail in Ireland (Connemara Greenway, 2015).

3.8 The Wild Atlantic Way

Some 689km of Galway's coastline runs through the Wild Atlantic Way (Neff, 1998). The Wild Atlantic Way offers 15 signature discovery points. Two of these are situated in Co. Galway; Killary Harbour and Derrigimlagh.

Killary Harbour is located in the heart of Connemara. The highest mountain in Connacht, Mweelrea, at 814m can be seen from the northern shore of the harbour; to the south the Maumturk Mountains can be seen.

Some €990,000 in funding was used to develop the Derrigimlagh Signature Discovery Point Project at Clifden, Co Galway, the site of the first commercial transatlantic wireless station, which went into service in 1907. The money, allocated from Fáilte Ireland's Wild Atlantic Way capital programme will significantly enhance the site. The proposed improvements to the site include a purpose built car and coach park facility with a substantial sculpture to celebrate the world's first transatlantic flight in the car park. Other developments will include a picnic area and a looped walk through bog land with informative steel and glass text display units, photographic displays and interactive sound devices (Fáilte Ireland, 2014o).

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