

Fitzpatrick Associates

KYLEMORE ABBEY®
& VICTORIAN WALLED GARDEN



Kylemore Abbey – Economic Impact Update

Final Report

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Executive Summary

- This report presents the results of an updated economic impact assessment of Kylemore Abbey and Victorian Walled Gardens, one of Ireland’s most popular visitor attractions. It has been prepared by Fitzpatrick Associates Economic Consultants on behalf of the Kylemore Trust, as an update to a previous study carried out in 2019.
- The objective of the study has been to provide an independent assessment of the economic impact of the Abbey in 2024, using a desk-based methodology to update the 2019 study, which includes (a) its direct economic impact (i.e. the jobs and incomes that it provides directly from its operations) and (b) its impact on the wider tourism, hospitality and service industries, through the expenditure of visitors that the Abbey attracts to the local area. Detailed description of the methodology used to update the study is also provided in the main report.
- In terms of direct economic impact, the report has found that Kylemore Abbey incurred about €8.7 mn in direct current expenditure on an annual basis in 2024, including both expenditure on wages and salaries and expenditure on the purchase of goods and services. In addition, capital expenditure of €7.4 mn was also incurred in the same year.
- Furthermore, over €6.1 mn of the €8.7 mn in current expenditure, or 70%, related to locally provided labour, goods and services (i.e. from within Galway and Mayo), with the vast majority of remaining expenditure (more than €2.1 mn, or 24%) incurred elsewhere in Ireland. Also, 97% of the €7.4 mn in capital expenditure related to locally provided goods and services, and all capital expenditure sourced such goods and services from within Ireland.
- In addition, the Abbey provided direct employment of more than 115 jobs on a full year basis in the year, including both full-time and part-time employment, or over 93 full-time equivalent jobs (FTEs). While employment at the Abbey experiences seasonal peaks and troughs over a year, it also nonetheless provided close to 100 jobs at all times in 2024, with employment hitting a high of about 135 jobs during the peak tourist season. Employment includes 16 jobs (and about €420,000 in wages and salaries) for residents of Gaeltacht areas in rural Galway and Mayo, while local capital expenditure at Kylemore in 2024 may account for about 60 FTEs in the year, based on estimates for the labour intensity of capital investments.
- In terms of its wider impact on tourism, Kylemore Abbey welcomed 573,000 visitors in 2024. The vast majority of these visitors were also visitors to the Galway-Mayo area (rather than local residents that already live in the area), with an estimated 484,000 out of 573,000 (or nearly 85%) coming from outside the area. Moreover, over 426,000 visitors to the Abbey in the year (or over 74%) came from out-of-state markets (e.g. UK, Europe, North America, other overseas markets).
- About 174,000 visitors in 2024 are estimated (on an indicative basis) to have been motivated to visit the Galway-Mayo area by the Abbey, with the vast majority of these visitors (152,000, or nearly 88%) staying in the Galway-Mayo area for at least one night or more. In addition, it is estimated that these 174,000 visitors spent an indicative estimate of €78.2 mn in the Galway-Mayo area during their stay, including €76.6 mn in expenditure by overnight visitors and €1.6 mn in expenditure by day trip visitors.

- Fáilte Ireland also estimates that every €1 mn in tourist expenditure helps to support 22 jobs. On this basis, the employment supported by over €78 mn in visitor expenditure in 2024 would be equivalent to 1,720 jobs in the Galway-Mayo area over a full year.
- *In summary, therefore, the combined expenditure impact of Kylemore Abbey in the Galway-Mayo area in 2024, including direct current expenditure of €6.1 mn, capital expenditure of €7.2 mn and an indicative wider tourist expenditure of €78.2 mn, comes to €91.5 mn. Also, when the jobs supported by tourist expenditure are added to the direct jobs created by Kylemore Abbey and any jobs supported through capital expenditure, the total employment supported by the Abbey in a single year comes to more than 1,850 jobs, in FTE terms.*

1. Introduction

1.1 Background

Kylemore Abbey and Victorian Gardens is an internationally acclaimed visitor attraction situated on a 1,000 acre estate in Connemara, close to the Galway-Mayo border. The Abbey was constructed over 150 years ago by Mitchell Henry and has been a source of local and regional enterprise and employment ever since. The Benedictine Community also made Kylemore their home in 1920 and marked their centenary there with the construction of a new monastery and educational and residential retreat centre, which was opened in 2024¹.

The main features of the attraction include:

- Kylemore Castle, which was built in the late 1800s, and which provides self-guided visitor access through the period rooms on the ground floor of the castle, plus a visitor centre that provides audio-visual presentations, photographic and artefact display, historical talks etc;
- the Victorian Walled Garden, which was developed alongside the castle in the late 1800s, and which was one of the last walled gardens of the Victorian period to be developed in Ireland;
- the neo-Gothic Church, a 14th Century styled church that is open to visitors and is also used to host music recitals, poetry readings and cross-community celebrations.

In addition, the wider Kylemore Abbey estate incorporates about 1,000 acres and provides access to walking trails, mountain hikes and fly-fishing, with pre-booked guided excursions available for all such activities. Also, the Abbey has substantial restaurant and retail facilities for visitors.

According to Fáilte Ireland data, Kylemore Abbey was Ireland's sixth most visited fee paying attraction outside the Greater Dublin Area in 2023, attracting some 328,000 fee paying visitors², while it also attracted about 220,000 other non-fee paying visitors that did not enter the attraction itself but that accessed some of the other amenities across the wider Kylemore estate, e.g. restaurant or retail facilities. Furthermore, these numbers increased to 344,000 fee paying visitors and 229,000 non-fee paying visitors in 2024.

1.2 Objectives

In 2019, Kylemore Abbey commissioned Fitzpatrick Associates to carry out an independent assessment of the economic impact of the Abbey, which sought to convey its overall local and regional economic importance to the wider Galway-Mayo area. This study, in particular, examined:

¹ Originally, the monastery was to be completed by December 2020, to coincide with the Benedictine Community's centenary at Kylemore Abbey. However, the Covid-19 pandemic delayed its construction.

² See <https://www.failteireland.ie/Research-Insights/Activities/visitor-numbers-to-attractions-dashboard.aspx>.

- the direct economic contribution of the Abbey to its local and regional economy through its expenditure on (a) wages and salaries and (b) purchase of goods and services;
- the significance of the Abbey as a local employer; and
- the wider importance of the Abbey to the tourism industry in the Galway-Mayo area, through the expenditure of visitors that are “influenced” to come to the area by the Abbey.

As a follow-up to this previous study, Kylemore Abbey has now asked Fitzpatrick Associates to complete a desk-based exercise to update the economic impact estimates, based on 2024 data. This exercise, in turn, is intended to then feed into a wider Abbey-authored report, which will highlight the wider value of the Abbey in its region, e.g. in terms of social activity and social enterprise.

1.3 Methodology

Key elements of the methodology that was used to carry out the 2019 study included:

- a) collation and analysis of data on Kylemore Abbey and its sphere of economic influence and activity, including income and expenditure data, employment data, and data on visitor numbers, trends and activities; and
- b) primary research via a large on-site survey of 400 visitors to the Abbey, which was used to collect data on the wider tourist expenditure of Kylemore visitors within the Galway-Mayo area.

In contrast, the methodology for carrying out this assignment has taken a mainly desk-based approach to updating estimates for economic impact, and it has thus not involved any updated primary research/survey element regarding wider tourist expenditure. Instead, the methodology for the present study has involved:

- updating the analysis of Abbey expenditure and employment using 2024 data;
- updating data on visitors to the Abbey, both fee paying and non-fee paying, based on 2024 attendances; and
- revisiting assumptions drawn from the 2019 primary research/survey, revising assumptions based on desk-based evidence where possible, and applying these assumptions to the visitor data so as to give an updated estimate of the wider tourist expenditure of Abbey visitors in the Galway-Mayo area.

In this regard, therefore, estimates should be treated as indicative, given that (a) estimates for wider tourist expenditure are not based on primary research and (b) there have been changes made to tourism data collection methodologies at the national level (see Section 2.2), which affects some secondary data sources that are used to guide the assumptions made.

For the purposes of this report, and in keeping with the previous report, it should also be noted that “local area” refers to the wider Galway-Mayo area, not just the immediate local vicinity of Kylemore Abbey.

1.4 Report Structure

This chapter is the first of five chapters in the report. The structure and content of the other main chapters are as follows:

- Chapter 2 summarises key tourism trends in Ireland since the previous report was prepared in 2019;
- Chapter 3 examines the direct and indirect economic impact of Kylemore Abbey, including its expenditure impact and its impact on employment;
- Chapter 4 examines the wider impact of the Abbey on tourism in the Galway-Mayo area, including its impact on visitor numbers to the area and the associated expenditure of those visitors; and
- Chapter 5 provides a brief summary of the main findings of the report.

2. Key Tourism Trends Since 2019

2.1 Overview

The purpose of this chapter is to summarise key tourism trends in Ireland since 2019, when the original report was prepared. This includes:

- Section 2.2, which discusses trends in out-of-state tourism, i.e. visits by overseas tourists and Northern Ireland residents; and
- Section 2.3, which discusses trends in domestic trips by Irish residents.

2.2 Out-of-State Tourism

Trends in tourist activity in Ireland since 2019 have been severely affected by the impact of the Covid-19 pandemic, which led to various levels of “lockdown” both in Ireland (between March 2020 and February 2022) and across the globe, and which also brought associated travel restrictions that significantly curtailed international travel for a prolonged period. As a result, overseas travel volumes to Ireland fell dramatically over the course of 2020 and 2021, with travel volumes starting to recover somewhat (when compared to pre-Covid levels) over the 2022-2024 period.

Table 2.1, therefore, shows Fáilte Ireland and Central Statistics Office (CSO) estimates for overseas tourism across both Ireland in general (in 2019, 2023 and 2024) and the Wild Atlantic Way more regionally (in 2019 and 2023), based on the Passenger Survey carried out by the CSO and Fáilte Ireland’s own Survey of Travellers. However, it should be noted that changes to the data collection methodology used by the CSO (for inbound tourism statistics) mean that 2023 estimates are not directly comparable to previous years, especially when comparing volume of visitors or visitor nights.

Allowing for this caveat, the data nonetheless suggests that the recent volume of overseas travel to Ireland, at both a national and a regional level, has been in a short-term recovery mode following the Covid-19 pandemic. Also, the data would suggest that expenditure by visitors to Ireland (on a per person basis) has grown markedly since 2019, which may reflect the strong inflationary and cost-of-living pressures that have affected the global economy since the end of the Covid-19 pandemic. In this regard, for example, the data in Table 2.1 would suggest:

- indicative growth of 73% in average visitor expenditure and 42% in average daily expenditure among visitors to the Wild Atlantic Way between 2019 and 2023 (based on Fáilte Ireland data); and
- indicative growth of 59% in average visitor expenditure and 46% in average daily expenditure among all visitors to Ireland between 2019 and 2023 (based on Fáilte Ireland data), plus growth in average visitor expenditure of 5% and average daily expenditure of 15% in 2024 (based on CSO data).

Related to this, for comparison purposes, CSO data on prices over the 2019-2024 period suggests that the cost of accommodation services (e.g. hotels) grew by 37%, while the cost of restaurants, cafés etc grew by 24%³. Recent results from the Crowe Horwath Ireland Annual Hotel Industry Survey, meanwhile, suggest that average daily room rates across Ireland grew by 34% across Ireland between 2019 and 2023, but they grew by 41% outside Dublin⁴.

	Wild Atlantic Way		Ireland		
	2019	2023	2019	2023	2024
Visits (000s)	3,400,000	2,200,000	9,674,000	6,564,000	6,591,600
Nights (000s)	23,460,000	18,480,000	71,877,820	53,168,400	49,142,300
Average length of stay	6.9	8.4	7.4	8.1	7.5
Expenditure (€mn)	1,900,000	2,100,000	5,174,000	5,581,300	6,029,000
Average visitor expenditure (€)	551.00	952.00	534.84	850.29	914.64
Average visitor expenditure per day (€)	79.86	113.33	71.98	104.97	122.69
GB %	n/a	n/a	36.0%	39.7%	37.0%
Europe %	n/a	n/a	37.3%	34.4%	35.6%
North America %	n/a	n/a	19.7%	20.4%	21.8%
Other %	n/a	n/a	7.0%	5.5%	5.5%
Holidaymaker %	70%	57%	54.1%	41.0%	42.6%
Visiting friends and relatives %	22%	31%	28.0%	37.0%	33.4%
Business %	8%	9%	13.6%	14.3%	15.0%
Other %	3%	4%	4.2%	7.7%	9.0%

Note: “n/a” = not available.

SOURCE: FÁILTE IRELAND (2019, 2023), CSO (2024)

In addition, the data would suggest a 22% indicative increase in average length of stay for visitors to the Wild Atlantic Way between 2019 and 2023, but a relatively static length of stay for all visitors to Ireland between 2019 and 2024 (following a decline in length of stay between 2023 and 2024). Indicative trends in market origin (especially across the main markets of Britain, Europe and North America) only suggest relatively small change, though trends in purpose of visit suggest a noticeable relative increase in share of visiting friends and relatives (VFRs) and a relative decrease in share of holidaymakers, both across Ireland and within the Wild Atlantic Way area. A plausible explanation for this, however, would be that the shifts in share between VFRs and holidaymakers reflect pent-up demand to visit friends and relatives, which was restricted over the Covid-19 period but which became available again from 2022 onwards.

Furthermore, visitors from Northern Ireland also generate foreign exchange earnings, though it is a much smaller market than the overseas visitor market in Ireland, as shown in Table 2.2 (for the period from 2019 to 2023). Recent data from the market, moreover, suggests some growth in visitors but a drop in expenditure from Northern Ireland, and little change in average visitor expenditure at the national level.

³ See https://ws.cso.ie/public/api.restful/PxStat.Data.Cube_API.ReadDataset/CPA06/XLSX/2007/en.

⁴ See *Ireland Annual Hotel Industry Survey 2023* and *Ireland Annual Hotel Industry Survey 2024*, Crowe Horwath, 2023 and 2024.

TABLE 2.2: NORTHERN IRELAND TOURISM – REGIONAL AND NATIONAL TRENDS – 2019 AND 2023

	Wild Atlantic Way		Ireland	
	2019	2023	2019	2023
Visits (000s)	605,000	430,000	1,277,000	1,347,000
Nights (000s)	1,694,000	1,204,000	3,192,500	3,232,800
Average length of stay	2.8	2.8	2.5	2.4
Expenditure (€mn)	186,000	82,000	402,000	398,800
Average visitor expenditure (€)	307.00	191.00	314.80	296.07
Average visitor expenditure per day (€)	109.64	68.21	125.92	123.36

SOURCE: FÁILTE IRELAND

2.3 Domestic Tourism

Domestic tourism accounts for a further significant share of overall tourism activity in Ireland. In this regard, Fáilte Ireland and CSO estimates that are derived from the CSO’s Household Travel Survey show significant growth in domestic trips in recent years, with a 16% growth in trips to the Wild Atlantic Way between 2019 and 2023 but a 43% growth in trips across all Ireland between 2019 and 2024. While average length of stay declined by 12%, however, visitor expenditure increased substantially, with Table 2.3 suggesting growth of:

- 19% in average visitor expenditure and 27% in average daily expenditure among domestic visits to the Wild Atlantic Way between 2019 and 2023; and
- 18% in average visitor expenditure and 33% in average daily expenditure among all domestic visits in Ireland between 2019 and 2024.

TABLE 2.3: DOMESTIC TOURISM – REGIONAL AND NATIONAL TRENDS – 2019 AND 2023

	Wild Atlantic Way		Ireland		
	2019	2023	2019	2023	2024
Visits (000s)	5,000,000	5,800,000	11,621,000	14,309,000	16,571,000
Nights (000s)	15,000,000	16,240,000	29,052,500	34,341,600	36,747,000
Average length of stay	3.0	2.8	2.5	2.4	2.2
Expenditure (€mn)	1,100,000	1,500,000	2,146,600	3,121,000	3,600,600
Average visitor expenditure (€)	210.00	249.00	184.72	218.11	217.28
Average visitor expenditure per day (€)	70.00	88.93	73.89	90.88	97.98

Note: “n/a” = not available.

SOURCE: FÁILTE IRELAND (2019, 2023), CSO (2024)

3. Expenditure and Employment Impact

3.1 Overview

The purpose of this chapter is to describe the expenditure and employment impact of Kylemore Abbey. To do this, the chapter has two sections:

- Section 3.2 examines annual expenditure by the Abbey; and
- Section 3.3 examines the level of employment that is directly and indirectly provided by the Abbey.

Note also that the chapter discusses expenditure and employment provided by two Abbey entities – Kylemore Abbey and Gardens (KAG) and the Kylemore Trust. Combined estimates for expenditure and employment are provided in Section 3.2 and Section 3.3, while a separate breakdown of expenditure on goods and services by each of these entities is provided in the appendix.

3.2 Direct Expenditure

The direct economic contribution that Kylemore Abbey makes to its local and regional economy flows from the actual expenditures of the Abbey and its operations. These expenditures can be sub-divided into two main categories:

- spend on wages and salaries; and
- spend on the purchase of goods and services.

Table 3.1 shows Kylemore Abbey’s direct expenditure within both these categories in 2018 (the base year for the previous study) and from 2022-2024. It shows that total expenditure in 2024 amounted to €8.7 mn, a significant increase (33%) on the €6.5 mn in expenditure incurred in 2018.

	Expenditure 2024 (€)	Expenditure 2023 (€)	Expenditure 2022 (€)	Expenditure 2018 (€)
Wages and salaries	3,027,741	2,807,841	2,458,151	1,981,986
Purchase of goods and services	5,675,196	5,186,392	4,317,458	4,559,339
TOTAL	8,702,937	7,994,232	6,775,609	6,541,325
	Expenditure 2024 (%)	Expenditure 2023 (%)	Expenditure 2022 (%)	Expenditure 2018 (%)
Wages and salaries	34.8	35.1	36.3	30.3
Purchase of goods and services	65.2	64.9	63.7	69.7
TOTAL	100.0	100.0	100.0	100.0

SOURCE: KYLEMORE ABBEY

Expenditure on wages and salaries was equivalent to about 35% of all expenditure in 2023 and 2024, while expenditure on purchase of goods and services accounted for the remaining 65%. In 2018, their equivalent shares were 30% and 70% respectively.

In addition, while some of Kylemore Abbey’s expenditure would be attributable to payments to suppliers outside the Galway-Mayo area, the beneficiaries of the largest share of expenditure would be locally based, which means that a large portion of the economic benefits deriving from the Abbey’s expenditure stay in its area. The vast majority of expenditure on wages and salaries, for example, is paid to employees living in the Galway-Mayo area, while Table 3.2 also shows that between 54% and 58% of the Abbey’s purchase of goods and services alone, in both 2023 and 2024, was sourced from suppliers situated in the area. In 2018, the equivalent share for purchase of local goods and services was 55%.

	Purchases 2024 (€)	Purchases 2023 (€)	Purchases 2022 (€)	Purchases 2018 (€)
Galway-Mayo	3,083,962	2,992,554	1,990,621	2,526,254
Rest of Ireland	2,110,901	1,995,510	1,643,859	1,761,952
Out-of-State	480,332	198,328	682,977	271,133
TOTAL	5,675,196	5,186,392	4,317,458	4,559,339
	Purchases 2024 (%)	Purchases 2023 (%)	Purchases 2022 (%)	Purchases 2018 (%)
Galway-Mayo	54.3	57.7	46.1	55.4
Rest of Ireland	37.2	38.5	38.1	38.6
Out-of-State	8.5	3.8	15.8	5.9
TOTAL	100.0	100.0	100.0	100.0

SOURCE: KYLEMORE ABBEY

Combined expenditure in the Galway-Mayo area, therefore, including both expenditure on wages and salaries and local purchase of goods and services, amounted to over €6.1 mn in 2024, or 70% of all expenditure incurred at Kylemore Abbey (compared to 69% in 2018). Also, the vast majority of the Abbey’s remaining other expenditure (nearly €2.1 mn, or 24%) was incurred elsewhere in Ireland.

Finally, alongside current expenditure, the Abbey also incurs capital expenditure on a regular basis, which again makes a contribution to the local and wider economy, e.g. such as through recent capital expenditure on the development of the new monastery and educational and residential retreat centre. For example:

- capital expenditure amounted to about €5.5 mn in 2023, while capital expenditure in 2024 amounted to over €7.4 mn; and
- 100% of capital expenditure in 2023 was attributable to the Galway-Mayo area, while 97% of expenditure in 2024 (€7.2 mn) was attributable to the local area.

3.3 Employment

As well as its contribution to expenditure in the Galway-Mayo area, Kylemore Abbey is a significant provider of local employment. Table 3.3, therefore, shows average employment at Kylemore Abbey in 2018 and from 2022-2024. It shows that the Abbey provided an average of 115 jobs on a full year basis in 2024, including both full-time and part-time employment, which was more or less on a par with the average employment in 2018.

In addition, given the seasonal nature of tourist activity, employment levels at Kylemore Abbey also vary during the year. For example, during the July-September period, which coincides with the peak tourist season, employment levels at the Abbey were at an average of about 135 jobs in 2024, while it provided over 125 jobs in direct employment in the earlier April-June period. Even in the tourist off-season, however, the Abbey remains a major contributor to employment in its area, providing an average of over 95 jobs in the January-March period during 2024, and over 100 jobs in the October-December period.

	2024	2023	2022	2018
January-March	97.0	89.7	n/a	98.7
April-June	125.7	131.7	n/a	125.7
July-September	134.7	142.3	n/a	134.3
October-December	104.0	106.7	n/a	105.0
FULL YEAR – AVERAGE	115.3	117.6	112.0	115.9

SOURCE: KYLEMORE ABBEY

Furthermore, when considering employment in terms of full-time equivalents (FTEs), Table 3.4 shows that employment at Kylemore Abbey grew significantly between 2018 and 2024, from about 78 FTEs to 93 FTEs. This means that the share of full-time jobs among total jobs at the Abbey in 2024 was much higher than it was in 2018, thereby providing more jobs on a year-round basis.

	2024	2023	2022	2018
January-March	71.5	66.3	57.4	52.3
April-June	101.5	106.9	85.4	88.2
July-September	117.5	120.2	108.2	102.9
October-December	82.9	80.5	76.4	66.9
FULL YEAR – AVERAGE	93.3	93.5	81.8	77.6

Note: Employment is measured in full-time equivalents (FTEs), whereby 37.5 person hours per week in employment is equivalent to one FTE.

SOURCE: KYLEMORE ABBEY

Notably, 16 employees (between full-time and part-time) are also resident in Gaeltacht areas in rural Galway and Mayo. Based on average earnings per FTE, therefore, Kylemore contributes about €420,000 in wages and

salaries in Gaeltacht communities⁵. Moreover, annual expenditure on local goods and services (€3.1 mn in 2024) is likely to support further high numbers of jobs indirectly in the Galway-Mayo area, although these numbers have not been estimated here due to the uncertainty about the operating circumstances of the Abbey's large and diverse set of suppliers.

Likewise, a further €7.2 mn in capital/construction expenditure in the local area (in 2024) supports further employment, which might be equivalent to about 60 FTEs on an indicative basis in a single year, based on estimates for the labour intensity of capital investment projects⁶.

⁵ This is based on an assumption of 13 FTE jobs being provided in Gaeltacht areas (i.e. proportionate to the ratio of FTEs to total jobs at Kylemore Abbey more generally), with each earning an average of about €32,450 (i.e. as per total wages and salaries at the Abbey divided by FTEs).

⁶ This is based on recent estimates for the labour intensity of public capital investment, which suggest that a construction project worth €10 mn in investment over a single year might support around 80 construction jobs in the year. See *Public Capital Programme 2021-2030: Labour Intensity of Public Investment*, Department of Public Expenditure and Reform, November 2021.

4. Wider Impact – Tourism in the Galway-Mayo Area

4.1 Overview

The importance of Kylemore Abbey to the tourism sector in the Galway-Mayo area, and to the local economy in Galway-Mayo, is already well recognised. In this regard, for example, the previous 2019 study found that visitors that were influenced by the Abbey to visit the Galway-Mayo area spent an estimated €54 mn during their stay, supporting an estimated 1,450 jobs.

The purpose of this chapter, therefore, is to again quantify the importance of Kylemore Abbey to the tourism sector in the Galway-Mayo area by deriving annualised estimates for the level of visitor expenditure in the area that can be attributed to the Abbey. This has been done through an analysis derived from two main sources:

- a) data on the annual number of visitors to Kylemore Abbey and their source markets, based on full-year data up to 2024; and
- b) updated metrics and estimates for key variables developed during the 2019 primary research/survey, which are then applied to the updated visitor numbers for 2024.

As noted in Section 1.3, estimates should be regarded as indicative given the desk-based nature of the exercise and changes in data collection methodologies for some national level sources.

Section 4.2 provides the analysis of visitor data for Kylemore Abbey, while Section 4.3 discusses updated metrics and assumptions for wider tourist expenditure. Section 4.4 then uses the data from Section 4.2 and Section 4.3 to derive 2024 estimates for the level of annual visitor expenditure in the Galway-Mayo area that can be attributed to the Abbey, and Section 4.5 provides indicative estimates of the potential impact of this expenditure on employment in the area.

4.2 Visits to Kylemore Abbey

The most recent full-year data for visitor numbers at Kylemore Abbey show that it attracted an estimated 573,000 visitors in 2024. These visitors included:

- nearly 344,000 fee paying visitors, i.e. visitors paying a fee to visit the Castle, the Victorian Walled Garden, the neo-Gothic Church etc; and
- over 229,000 non-fee paying visitors, i.e. visitors that do not enter the fee paying attraction but that access some of the other amenities of the wider Kylemore estate, e.g. restaurant or retail facilities.

However, the profile of fee paying and non-fee paying visitors can be quite different, in terms of source markets. Therefore, separate analysis of fee paying visitors is provided in Section 4.2.1, while analysis of non-fee paying visitors is provided in Section 4.2.2.

4.2.1 Fee Paying Visits

Table 4.1 provides data on the number of fee paying visits to Kylemore Abbey in 2018 and from 2022-2024, broken down by key source market, i.e. local residents (people from Galway or Mayo), visitors from other parts of Ireland and visitors from out-of-state markets (e.g. UK, Europe, North America, other overseas markets).

Market	2018	2022	2023	2024
Local (Galway-Mayo)	13,324	14,673	15,331	20,025
Rest of Ireland	23,193	25,310	26,687	34,857
Out-of-State	300,476	216,060	286,254	288,722
TOTAL	336,993	256,043	328,272	343,604
Local (Galway-Mayo)	4.0%	5.7%	4.7%	5.8%
Rest of Ireland	6.9%	9.9%	8.1%	10.1%
Out-of-State	89.1%	84.4%	87.2%	84.1%
TOTAL	100.0%	100.0%	100.0%	100.0%
VISITS TO GALWAY-MAYO	323,669	241,370	312,941	323,579

Note: Kylemore Abbey data on visitor numbers does not provide a breakdown of Irish visits between residents and non-residents of the Galway-Mayo area. Therefore, the split of local resident and other Irish visits used above is derived from the 2019 visitor survey, which estimated that nearly 37% of fee paying Irish visitors to Kylemore Abbey were residents of Galway-Mayo, with the remaining 63% being incoming visitors to the area.

SOURCE: KYLEMORE ABBEY

The table shows that total fee paying visits to the Abbey numbered nearly 344,000 in 2024, up from 337,000 in 2018 (the base year for the previous study), 256,000 in 2022 and 329,000 in 2023. Furthermore, the data also shows that the vast majority of visits are made by incoming visitors to the Galway-Mayo area, rather than residents of the local area:

- it is estimated that more than 94% of fee paying visits to the Abbey in 2024 were made by visitors to the Galway-Mayo area, including 84% made by visitors from out-of-state markets; and
- fee paying visits to the Abbey that were made by visitors to the Galway-Mayo area numbered nearly 324,000 in 2024, up from 241,000 in 2022 and 313,000 in 2023, and on a par with 324,000 in 2018.

While domestic visits from elsewhere in Ireland increased from 23,000 up to 35,000 between 2018 and 2024, however, out-of-state visits declined slightly from 300,000 to 289,000. In the same period, visits from the US grew by 34% (from 98,000 to 131,000), visits from the UK remained static at about 11,000, but visits from elsewhere in Europe declined by 13%, from 142,000 to 124,000.

4.2.2 Non-Fee Paying Visits

Kylemore Abbey management estimates that the number of non-fee paying visits made to the Abbey is generally equivalent to about two-thirds of fee paying visitor numbers, or 40% of all visits (fee paying and non-fee paying). This estimate is based on the evidence of “clicker” count data, which the Abbey collects on a quarterly basis at entry points to the site.

Table 4.2, therefore, estimates that non-fee paying visits to the Abbey in 2024 were just over 229,000, up from just under 225,000 in 2018. However, the breakdown of these visits by source market would be quite different to that observed for fee paying visits, with Abbey management estimates for the previous study suggesting that about 30% of non-fee paying visits come from residents of the Galway-Mayo area, with another 10% coming from the rest of Ireland, and with the remaining 60% coming from out-of-state markets.

The market profile of non-fee paying visits is thus noticeably different to the profile of fee paying visits, with a lesser (but still significant) share of incoming visitors to the Galway-Mayo area. Using the same market breakdown across the 2018-2024 period, this suggests that non-fee paying visits made by visitors to the Galway-Mayo area numbered an estimated 160,000 in 2024, up from an estimated 157,000 in 2018.

Market	2018	2022	2023	2024
Local (Galway-Mayo)	67,399	51,209	65,654	68,720
Rest of Ireland	22,466	17,070	21,885	22,907
Out-of-State	134,797	102,416	131,309	137,442
TOTAL	224,662	170,695	218,848	229,069
Local (Galway-Mayo)	30.0%	30.0%	30.0%	30.0%
Rest of Ireland	10.0%	10.0%	10.0%	10.0%
Out-of-State	60.0%	60.0%	60.0%	60.0%
TOTAL	100.0%	100.0%	100.0%	100.0%
VISITS TO GALWAY-MAYO	157,263	119,486	153,194	160,349

SOURCE: KYLEMORE ABBEY

4.3 Key Assumptions

Assessing the influence of Kylemore Abbey on the wider expenditure of visitors to the Galway-Mayo area, including both domestic and overseas visitors, requires assumptions to be made about key variables that affect the Abbey’s potential impact on wider visitor expenditure. These variables include:

- whether or not visitors were in the area on an overnight or day trip basis;
- the number of nights spent in the area (for overnight visitors);
- the relative importance of Kylemore Abbey in visitors’ decision to visit the Galway-Mayo area; and
- expenditure incurred by visitors while visiting the area.

Table 4.3 provides the assumptions that were used in the previous 2019 study (which were informed by the survey of visitors conducted at that time) and the updated indicative assumptions that have been applied for this report.

All Visitors	2018	2024
Share of visitors to Galway-Mayo – overnight visits (%)	91.2%	91.2%
Share of visitors to Galway-Mayo – day trip visits (%)	8.8%	8.8%
Share of fee paying visitors influenced by Kylemore Abbey – overnight visits (%)	48.1%	41.4%
Share of fee paying visitors influenced by Kylemore Abbey – day trip visits (%)	69.7%	59.9%
Share of non-fee paying visitors influenced by Kylemore Abbey – overnight visits (%)	24.0%	20.7%
Share of non-fee paying visitors influenced by Kylemore Abbey – day trip visits (%)	34.9%	30.0%
Visitors – Influenced by Kylemore Abbey	2018	2024
Average number of nights spent in Galway-Mayo – overnight visits	2.8	3.1
Average daily expenditure in Galway-Mayo – per person – overnight visits (€)	€108.26	€162.40
Average daily expenditure in Galway-Mayo – per person – day trip visits (€)	€48.88	€73.32

SOURCE: FITZPATRICK ASSOCIATES ANALYSIS OF SURVEY DATA

For two variables, the same assumptions used in the previous study have been retained for the current update, on the basis that there are no more up-to-date assumptions available. These are:

- the assumed share of Kylemore visitors that stay in the Galway-Mayo area on an overnight basis (just over 91%); and
- the assumed share of Kylemore visitors that visit the Galway-Mayo area on a day trip basis only (just under 9%).

Other variables have been adjusted, however, based on desk-based evidence regarding tourism patterns and trends in the period since the previous study. In particular:

- the assumed shares for influenced fee paying visitors, including both overnight and day trip visitors, have been adjusted downwards by 14% (i.e. from just over 48% to just over 41% for overnight visitors, and from just under 70% to just under 60% for day trip visitors);
- the assumed shares for influenced non-fee paying visitors, again including both overnight and day trip visitors, have similarly been adjusted downwards by 14% (i.e. from just over 24% to just under 21% for overnight visitors, and from just under 35% to 30% for day trip visitors);
- average length of stay for overnight visitors, both fee paying and non-fee paying, has been adjusted upwards by 12.5% (i.e. from 2.8 nights to 3.1 nights); and
- average daily expenditure for overnight and day trip visitors, both fee paying and non-fee paying, has been adjusted upwards by 50% (i.e. from over €108 to over €162 for overnight visitors, and from nearly €49 to over €73 for day trip visitors).

The adjustments to assumptions about influenced visitors have been made to reflect indicative changes in purpose of visit patterns among visitors to Ireland, in particular the relative increase in share of visitors whose main purpose of visit is for VFR purposes and the relative decrease in share of visitors whose main purpose of visit is for holiday purposes. The data in Table 2.1, for example, suggests that the share of overseas visitors to Ireland that were VFRs increased from 28% to 33% between 2019 and 2024, while the share of VFRs among overseas visitors to the Wild Atlantic Way increased from 22% to 31% between 2019 and 2023. In contrast, the share of overseas visitors to Ireland that were holidaymakers decreased from 54% to 43% between 2019

and 2024, while the share of holidaymakers among overseas visitors to the Wild Atlantic Way decreased from 70% to 57% between 2019 and 2023. Moreover, this increase in VFR share and decrease in holidaymaker share was evident across all major source markets (i.e. Britain, Europe and North America).

Given the increase in share of visitors that come primarily for VFR purposes, therefore, it is reasonable to assume that the share of holidaymakers that are influenced to visit the Galway-Mayo area by Kylemore will also have declined somewhat. For example, to illustrate this, applying national estimates for purpose of visit by main source market (i.e. Britain, Europe, North America and Rest of World) to the Abbey's data on visitors by source market in 2019 and 2024 would imply that the holidaymaker share of Kylemore's overnight visitors falls from 61% to 53%, or a drop of about 14%.

Similarly, the adjusted assumption about length of stay for overnight visitors reflects indicative changes in length of stay trends, in particular a 22% growth in average length of stay among overseas visitors to the Wild Atlantic Way between 2019 and 2023, but with a subsequent decline in length of stay nationally between 2023 and 2024 (see Section 2.2). Given the growth in length of stay across the Wild Atlantic Way between 2019 and 2023, but also assuming a decline in average length of stay across the area between 2023 and 2024, an assumption of 12.5% growth in average length of stay is made for between 2019 and 2024, from 2.8 nights to 3.1 nights⁷.

Finally, assumptions for average daily expenditure take account of indicative trends outlined in Section 2.2 and Section 2.3, which show:

- a 42% increase in average daily expenditure among overseas visitors to the Wild Atlantic Way between 2019 and 2023, and a 46% increase in average daily expenditure among overseas visitors to Ireland in the same period;
- a 27% increase in average daily expenditure among domestic visitors to the Wild Atlantic Way between 2019 and 2023, and a 33% increase in average daily expenditure for all domestic tourists in Ireland between 2019 and 2024;
- price trends for accommodation services, hotels and restaurants etc, as evident from other sources.

Also, given the strong growth in average daily expenditure for overseas visitors to Ireland between 2023 and 2024 (see Section 2.2), it is assumed here that the growth evident for the Wild Atlantic Way between 2019 and 2023 was further extended into 2024. Therefore, an assumed growth of 50% is applied for average daily expenditure by visitors to Kylemore between 2019 and 2024.

The profile of visitors to Kylemore (Section 4.2) and these key assumptions (Section 4.3) are now used in Section 4.4 to derive estimates of the Abbey's wider impact on expenditure in the Galway-Mayo area.

⁷ For comparison, if the 22% growth in length of stay across the Wild Atlantic Way between 2019 and 2023 was followed by the national average fall for length of stay between 2023 and 2024, the overall growth between 2019 and 2024 would be close to 13%.

4.4 Wider Impact – Visitor Expenditure

The wider impact of Kylemore Abbey on visitor expenditure in the Galway-Mayo area is calculated by multiplying the number of visitors that were influenced to visit the area by the Abbey (both overnight and day trip visitors) by:

- a) their average daily expenditure per person while visiting the area; and
- b) their average number of nights spent in the area (for overnight visitors only).

Number of “influenced” visitors to the area

x Average daily expenditure per person

x Average length of stay (for overnight visitors)

= Visitor expenditure

Section 4.4.1 and Section 4.4.2 therefore present estimates for this visitor expenditure, for overnight and day trip visitors respectively, based on the findings in Section 4.2 and Section 4.3. Also, as noted in Section 1.3, it should be remembered that these estimates for visitor expenditure relate to expenditure in the wider Galway-Mayo area, not just the immediate local vicinity of Kylemore Abbey.

4.4.1 Visitor Expenditure – Overnight Visitors

Table 4.4 outlines the estimates for annual visitor expenditure by overnight visitors to the Galway-Mayo area in 2024, which can be attributed to Kylemore Abbey. The estimates are based on the analysis derived from the Abbey’s visitor data for the full year of 2024 (Section 4.2) and from the assumptions outlined in Section 4.3, with assumptions used and adjustments made as follows:

- the share of overnight visitors among total visitors is assumed to be 91.2%, for both fee paying and non-fee paying visitors;
- for fee paying visitors, the share of overnight visitors that are influenced by Kylemore Abbey is assumed to be 41.4%. For non-fee paying visitors, however, it is assumed that the equivalent share is half the share for fee paying visitors (20.7%), on the basis that such visitors are less likely to have been influenced to visit the area by the Abbey;
- average length of stay, for both fee paying visitors and non-fee paying visitors, is assumed to be 3.1 nights; and
- average daily expenditure, for both fee paying visitors and non-fee paying visitors, is assumed to be just over €162.

Based on these assumptions, the table suggests that over 152,000 overnight visitors may have been influenced to visit the Galway-Mayo area by Kylemore Abbey in 2024. Based on an average expenditure of over €162 per day and an average stay of 3.1 nights in the Galway-Mayo area, therefore, the level of visitor expenditure in the area that can be attributed to the Abbey comes to €76.6 mn.

	Fee Paying Visitors	Non-Fee Paying Visitors	TOTAL
A. No. of visitors to Galway-Mayo – overnight and day trip	323,579	160,349	483,928
B. Overnight share of visitors (%)	91.2%	91.2%	-
C. No. of visitors to Galway-Mayo – overnight only (A x B)	294,952	146,162	441,114
D. Share of overnight visitors influenced by Kylemore Abbey (%)	41.4%	20.7%	-
E. No. of overnight visitors influenced by Kylemore Abbey (C x D)	121,966	30,220	152,186
F. Average length of stay	3.1	3.1	-
G. No. of overnight visitor nights (E x F)	378,031	93,666	471,697
H. Average daily expenditure per person (€)	€162.40	€162.40	-
I. TOTAL DIRECT EXPENDITURE (€) – ANNUAL ESTIMATE (G x H)	€61,390,424	€15,210,891	€76.601.314

Note: Figures may be subject to rounding.

SOURCE: FITZPATRICK ASSOCIATES

4.4.2 Visitor Expenditure – Day Trip Visitors

Table 4.5 outlines the estimates for annual visitor expenditure by day trip visitors to the Galway-Mayo area, which can be attributed to Kylemore Abbey. Estimates are again based on the analysis derived from the Abbey’s visitor data for 2024 and from the assumptions outlined in Section 4.3, with assumptions used and adjustments made as follows:

- the share of day trip visitors among total visitors is assumed to be 8.8%, for both fee paying and non-fee paying visitors;
- for fee paying visitors, the share of overnight visitors that are influenced by Kylemore Abbey is assumed to be 59.9%. For non-fee paying visitors, however, it has again been assumed that the equivalent share is half the share for fee paying visitors (30.0%), on the basis that such visitors are less likely to have been influenced to visit the area by the Abbey; and
- average daily expenditure, for both fee paying visitors and non-fee paying visitors, is assumed to be over €73.

Based on these assumptions, the table suggests that over 21,000 day trip visitors may have been influenced to visit the Galway-Mayo area by Kylemore Abbey in 2024. Based on an average expenditure of over €73 per day, therefore, the level of visitor expenditure in the area that can be attributed to the Abbey comes to nearly €1.6 mn.

TABLE 4.5: KYLEMORE ABBEY – IMPACT ON VISITOR EXPENDITURE IN GALWAY-MAYO – DAY TRIPS – 2024

	Fee Paying Visitors	Non-Fee Paying Visitors	TOTAL
A. No. of visitors to Galway-Mayo – overnight and day trip	323,579	160,349	483,928
B. Day trip share of visitors (%)	8.8%	8.8%	-
C. No. of visitors to Galway-Mayo – day trip only (A x B)	28,628	14,186	42,814
D. Share of day trip visitors attributed to Kylemore Abbey (%)	59.2%	29.6%	-
E. No. of day trip visitors attributed to Kylemore Abbey (C x D)	17,159	4,252	21,411
F. Average daily expenditure per person (€)	€73.32	€73.32	-
G. TOTAL DIRECT EXPENDITURE (€) – ANNUAL ESTIMATE (E x F)	€1,258,085	€311,720	€1,569,805

Note: Figures may be subject to rounding.

SOURCE: FITZPATRICK ASSOCIATES

4.5 Wider Impact – Employment

Based on the visitor data shown in Section 4.2 and the assumptions outlined in Section 4.3, Section 4.4 suggests that about €78.2 mn in annual expenditure by visitors to the Galway-Mayo area can be attributed to the influence of Kylemore Abbey on visitors’ decision to visit, i.e. €76.6 mn in expenditure by overnight visitors and €1.6 mn in expenditure by day trip visitors.

This expenditure, in turn, impacts on the Galway-Mayo economy by generating employment in tourism, hospitality and related businesses in the area. In this regard, for example, Fáilte Ireland estimates that every €1 mn in tourist expenditure helps to support 22 jobs⁸.

Using this metric, therefore, the employment supported by Abbey-influenced visitor expenditure would be equivalent to 1,720 jobs in the Galway-Mayo area over a full year.

⁸ See *Key Tourism Facts 2023*, Fáilte Ireland, 2023.

5. Summary of Key Findings

- In terms of direct economic impact, it is estimated that Kylemore Abbey provided about €8.7 mn in direct current expenditure on an annual basis in 2024, including both expenditure on wages and salaries and expenditure on the purchase of goods and services. In addition, capital expenditure of €7.4 mn was also incurred in the same year.
- Furthermore, over €6.1 mn of the €8.7 mn in current expenditure, or 70%, related to locally provided labour, goods and services (i.e. from within Galway and Mayo), with the vast majority of remaining expenditure (more than €2.1 mn, or 24%) incurred elsewhere in Ireland. Also, 97% of the €7.4 mn in capital expenditure related to locally provided goods and services, and all capital expenditure sourced such goods and services from within Ireland.
- In addition, the Abbey provided direct employment of more than 115 jobs on a full year basis in 2024, including both full-time and part-time employment, or over 93 FTEs. While employment at the Abbey experiences seasonal peaks and troughs over a year, it also nonetheless provided close to 100 jobs at all times in 2024, with employment hitting a high of about 135 jobs during the peak tourist season. Employment includes 16 jobs (and about €420,000 in wages and salaries) for residents of Gaeltacht areas in rural Galway and Mayo, while local capital expenditure at Kylemore in 2024 may account for about 60 FTEs in the year, based on estimates for the labour intensity of capital investments.
- In terms of its wider impact on tourism, Kylemore Abbey welcomed 573,000 visitors in 2024. The vast majority of these visitors were also visitors to the Galway-Mayo area (rather than local residents that already live in the area), with an estimated 484,000 out of 573,000 (or nearly 85%) coming from outside the area. Moreover, over 426,000 visitors to the Abbey in the year (or over 74%) came from out-of-state markets (e.g. UK, Europe, North America, other overseas markets).
- About 174,000 visitors in 2024 are estimated (on an indicative basis) to have been motivated to visit the Galway-Mayo area by the Abbey, with the vast majority of these visitors (152,000, or nearly 88%) staying in the Galway-Mayo area for at least one night or more. In addition, it is estimated that these 174,000 visitors spent an indicative estimate of €78.2 mn in the Galway-Mayo area during their stay, including €76.6 mn in expenditure by overnight visitors and €1.6 mn in expenditure by day trip visitors.
- Fáilte Ireland also estimates that every €1 mn in tourist expenditure helps to support 22 jobs. On this basis, the employment supported by over €78 mn in visitor expenditure in 2024 would be equivalent to 1,720 jobs in the Galway-Mayo area over a full year.
- ***In summary, therefore, the combined expenditure impact of Kylemore Abbey in the Galway-Mayo area in 2024, including direct current expenditure of €6.1 mn, capital expenditure of €7.2 mn and an indicative wider tourist expenditure of €78.2 mn, comes to €91.5 mn. Also, when the jobs supported by tourist expenditure are added to the direct jobs created by Kylemore Abbey and any jobs supported through capital expenditure, the total employment supported by the Abbey in a single year comes to more than 1,850 jobs, in FTE terms.***

Appendix

Purchase of Goods and Services – KAG and Kylemore Trust

	Expenditure 2024 (€)	Expenditure 2023 (€)	Expenditure 2022 (€)	Expenditure 2018 (€)
Goods and services - KAG	4,948,747	4,703,015	3,457,044	4,058,023
Goods and services – Kylemore Trust	726,449	483,376	860,414	501,316
TOTAL	5,675,196	5,186,392	4,317,458	4,559,339
	Expenditure 2024 (%)	Expenditure 2023 (%)	Expenditure 2022 (%)	Expenditure 2018 (%)
Goods and services - KAG	87.2	90.7	80.1	89.0
Goods and services – Kylemore Trust	12.8	9.3	19.9	11.0
TOTAL	100.0	100.0	100.0	100.0

SOURCE: KYLEMORE ABBEY

Goods and Services – KAG and Kylemore Trust – by Source

KAG	Purchases 2024 (€)	Purchases 2023 (€)	Purchases 2022 (€)	Purchases 2018 (€)
Galway-Mayo	2,794,516	2,735,925	1,737,387	2,166,767
Rest of Ireland	1,946,166	1,802,523	1,535,165	1,624,923
Out-of-State	208,066	164,568	184,492	266,333
TOTAL	4,948,747	4,703,015	3,457,044	4,058,023
Kylemore Trust	Purchases 2024 (€)	Purchases 2023 (€)	Purchases 2022 (€)	Purchases 2018 (€)
Galway-Mayo	289,447	256,629	253,234	359,487
Rest of Ireland	164,735	192,987	108,694	137,029
Out-of-State	272,267	33,760	498,486	4,800
TOTAL	726,449	483,376	860,414	501,316
TOTAL	Purchases 2024 (€)	Purchases 2023 (€)	Purchases 2022 (€)	Purchases 2018 (€)
Galway-Mayo	3,083,962	2,992,554	1,990,621	2,526,254
Rest of Ireland	2,110,901	1,995,510	1,643,859	1,761,952
Out-of-State	480,332	198,328	682,977	271,133
TOTAL	5,675,196	5,186,392	4,317,458	4,559,339

SOURCE: KYLEMORE ABBEY