Hospitality Sector Related Employment in Dail Constituencies and Counties 2016

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1. Introduction

This report updates some aspects of the 2016 constituency report which identified hospitality and certain other drinks-related employment in Dail constituencies (Foley, 2016). It is intended to fully update the 2016 report in 2018. However, due to new CSO estimation methodology, there have been significant revisions to certain already published CSO data on domestic tourism expenditure since the 2016 report. In addition, the regular updating of other data series such as employment has occurred. The current report updates some aspects of the 2016 report based on this revised CSO data. Other aspects of the 2016 report such as the multipliers used and the estimation of additional local employment in drinks activities such as off-licences and wholesalers are unchanged from the 2016 report.

In addition to the constituency profiles, this report provides additional focus on the national and county performance. The employment classifications used for the hospitality sector are NACE sectors 55 and 56. This classification includes hotels and similar accommodation, holiday and other short stay accommodation, camping grounds and trailer parks, restaurants, event catering and beverage serving activities. The report's coverage also includes drinks industry and drinks related enterprises which are not included in the hospitality sector as measured by the Central Statistics Office in NACE 55 and 56, and Failte Ireland, such as manufacturers, off –licence retailers and alcohol wholesalers and other distributors.

The national economic impact of the drinks and other hospitality sectors is substantial. There are 148k jobs in the CSO category of accommodation and food and beverage serving. There are over 220k jobs in the wider Failte Ireland definition of the tourism/hospitality sector.

Nationally, there are 7193 public houses, 631 hotel bars, 431 special restaurant licences, 1975 wine only restaurants, 73 other bars, 1645 full off- licences, 1516 wine only off-licences and 71 other off-licences. There are 112 manufacturing licences but with some companies having more than one, 63 are for beer, 12 are for cider manufacturing and 30 are for distilling and compounding of spirits. In recent years there has been a substantial increase in the number of new craft breweries and distilleries. Nationally, according to the CSO latest detailed data relating to 2014, the combined hotel, accommodation, restaurant, catering and public house sectors together directly generated 17,790 enterprises, turnover of €9.7 billion, a wages bill of € 2.8 billion and purchases of €5.7 billion of materials and services inputs. In addition drinks manufacturing in 2014 generated wages of €212 million, €836 million in materials purchases including agricultural products and €785 million in non-industrial services purchases.

2. Methodology

The methodology is the same as in the 2016 constituencies report The report mainly uses a range of official and semi official sources from CSO, Failte Ireland and the Revenue Commissioners. It also uses limited industry sources and author's estimates to identify certain aspects of the economic role of the wider hospitality sector and the drinks industry in individual Dail constituencies and counties. Data limitations require that the main focus is on employment and tourism expenditure rather than other aspects of economic impact such as local purchases. Data limitations also require the extensive use of assumptions and national averages which are identified in the report.

Drinks in the context of this report refer to alcoholic drinks. Soft drinks manufactures or distributors, where they exist in specific constituencies, are not individually identified and where known are not included in the employment impact. However, data limitations impose some constraints on this objective. For example, the employment information on drinks manufacturing from the CSO's Quarterly National Household Survey (QNHS) and the Census of Industrial Production refer only to beverages as a whole and does not separately identify soft drinks. Of course, many licensed trade distributors also include soft drinks in their product portfolios and in these cases the whole activity of the distributor is included. The primary objective is to ensure that robust and reasonable estimates are made of the national and local hospitality employment and the role of the drinks sector in individual constituencies.

There are different classifications of what constitutes the "tourism" or "hospitality" sector. The Central Statistics Office publishes employment data for NACE 55 and 56, accommodation and food and beverages services (including bars). This is available at the national and regional levels. In Quarter 4 2015 the total employment in these two sectors was 143,100 persons. The regional breakdown is on the NUTS3 classification. County and county and sub-county details are not available.

The 2015 tourism policy report (People, Place and Policy, Growing Tourism to 2025) stated that….

"*The tourism sector supports 140,000 jobs in the accommodation and food sector alone, and overall employment in tourism is estimated to be in the region of 200,000"*

This results in a ratio of 1.429 between the CSO and broader measures of hospitality employment.

The Failte Ireland report, Tourism Facts 2014 (revised in February 2016) states that the CSO employment measure was 138.9k persons and that the wider measure of "tourism and hospitality" employment was an estimated 205k persons. The wider definition would include activities such as visitor centres and recreational facilities. The ratio from this source is 1.476.

As noted in the 2016 report, as of Quarter 4 2015, total employment in the CSO category of accommodation and food and beverage services was 143.1k persons. Based on the Failte Ireland data for 2014, and a ratio of 1.476, this implied about 211.2 k persons in the wider hospitality sector in 2015. This 1.476 ratio was used in the 2016 report.

The Tourism Facts 2015 report notes that CSO employment was 139.9k and the wider hospitality total at approximately 220k persons. The latter includes those for whom the sector would not be the "main job". The 139.9k refers to Q3 2015. The resulting ratio on these latest figures is 1.573. However, the Q4 2015 CSO total is 143.1k and the resulting ratio based on this is 1.537.

The CSO Q4 2016 total was 148.0k and applying a 1.537 ratio to this generates a broader hospitality total employment of 227k persons. The regional breakdown of this total is shown in Table 1.

There are two possibilities for selection of the national hospitality employment control total from which the county and constituency data would be estimated as discussed in the 2016 report. The report could take the broader hospitality employment figure as the base for estimating the county breakdown. There are no published details of the sectoral or geographic composition of the additional 79k jobs above the CSO total. The additional 79k jobs are not likely to be evenly spread between counties. For example, visitor centres are not present in each county. There are drinks visitor centres in, for example, Dublin, Midleton, Kilkenny, Tullamore and Kilbeggan. Other major tourist attractions, which would be included in the broader total, are also location specific such as the Cliffs of Moher, Tayto Park and Rock of Cashel. Airports are in various counties such as Dublin, Cork, Clare, Kerry, Galway, Mayo, Waterford and Sligo but not in other areas.

Alternatively, since this report is primarily concerned with the hospitality sector from the perspective of the drinks sector (as broadly defined) there is a strong case for confining the total to the narrower CSO definition and for separately identifying and including other drinks related activities which are in sectors other than accommodation and food and beverage services such as visitor centres, off licences, distributors and drinks manufacturers. While hotels are not exclusively drinks providers, many have bars and drinks sales are a significant share of hotel sales and restaurants are suppliers of substantial amounts of wine. Consequently, it is valid to use the CSO classification to include these two sectors even though a substantial part of their activities are not related to alcohol.

Because of the drinks related element of the report it is more appropriate to use the lower CSO national employment measure for the hospitality sector. However, the report also includes brief information on the wider Failte Ireland aggregate for information purposes and refers to the additional non-hospitality aspects of the drinks industry for each constituency and county where they exist.

Additional data at the county level would improve the accuracy of the estimates. However, the FI estimates of regional and county expenditure and the CSO regional employment and expenditure data provide a solid basis or control for the estimates. The national CSO totals are a control on the aggregation of the county and constituency totals. Carrier receipts are not included in the exercise. Tourism expenditure by Northern Ireland visitors is not included. In addition the FI and CSO classification of domestic tourism expenditure refer to tourism activity which involves at least one overnight and excludes day trips. However, the CSO employment data refer to all employment in the hotel, other accommodation, restaurants and bars sectors.

An additional source of county level employment data is the census of population but this refers to 2011 and is relatively out of date. 2016 census employment data are not yet available.

The individual county and constituency profiles present details of the local drinks related employment contribution and enterprises as well as the broader hospitality related employment as defined by the CSO. The drinks industry includes manufacturing of beverages,(beer, spirits and cider), the on–licence retail sector of pubs and hotels, licensed restaurants both full and wine only, full and wine off-licences and wholesale/distribution companies. In addition reference is made to drinks related visitor attractions. The economic contribution of the drinks sector includes(1) the direct economic contribution in the four strands of the industry, brewing and distilling (manufacturing), wholesale distribution, on-licence retail distribution and off-licence retail distribution, (2) the indirect employment generated by the purchases of the drinks industry (including agricultural inputs, other materials inputs and services) and (3) the additional induced employment generated by the employment multiplier associated with the economic activity of the first two employment types. The rest of the hospitality sector, hotels and restaurants also provide direct, indirect and multiplier effects. The multiplier or induced effect refers primarily to the spending on domestic output of the wages and salaries generated by the direct and indirect employment of the hospitality sector.

The idea of direct and indirect employment from the hospitality and drinks sectors is conceptually clear at the national level even if its empirical estimation is difficult due to the limited data sources. However, it is more problematic when attempting to identify the local or constituency contribution. For example, a distillery or hotel in a county may generate a specific level of employment but a proportion of the employment may be resident in a different county or constituency. Not all of an establishment’s direct employment will be resident in that area. The same applies to the indirect employment and multiplier employment.

The domestic purchases of a drinks establishment are unlikely to arise solely in the county or constituency of the establishment’s location. The smaller the area the greater is the leakage of expenditure and employment from that locality. However, this also implies that areas which do not have any drinks establishments present may still have residents who derive economic benefit from drinks establishments located elsewhere. The CSO QNHS employment data is based on a survey of households and the regional data refer to the location of those employed rather than the location of the employer. Other data such as the number and distribution of licensed premises refer to the location of the enterprises.

The report applies the estimated indirect employment to direct employment national ratio to each county and constituency's direct employment and assumes the additional employment is attributed to that same area. This understates the indirect contribution of some constituencies and overstates it in other constituencies. This is a better approach than selective allocations to individual areas in the absence of constituency comprehensive or extensive data. While some geographic aspects of the purchases contribution are clear many are unclear. For example, the agricultural purchases by Diageo for its Dublin brewery arise in areas other than Dublin. However, overall, there is insufficient data to directly identify the specific constituency which gains from non agricultural inputs. Hence, our approach is to allocate the national total to each area in proportion to its known direct employment. Foley 2016 estimated a multiplier of 0.32 additional jobs for each direct job. The same multiplier is used in this 2017 constituencies report. This will be revised in light of new business sectoral estimates of purchases already published by the CSO when the full update is done in 2018.

The data sources are not comprehensive for several drinks activities outside the CSO hospitality sectors. Consequently various assumptions have to be made. A survey of NOFLA members identified the average employment in independent off-licences used in the 2016 report. This estimate is retained in this report. Allowing for adjustments for other off-licence sectors this formed a basis for the average size of full off licences. In some constituencies there are significant known local contributions apart from the national contribution such as farmers supplying barley and visitor centres and these are referred to where known.

The numbers of pubs, other bars, hotel bars, full and wine restaurant licences, full and wine off-licences and manufacturers and wholesalers in each county were identified from the Revenue individual licence database. This data is retained from the 2016 report. Where a constituency was less than a county, the number of retail enterprises was allocated between constituencies on a population basis. This is less appropriate for some of the Dublin constituencies where there are different levels of pub penetration relative to population in some areas. However, imprecise data required the allocation by population method. This approach and estimates of the 2016 report are repeated in this assessment.

The retail and wholesale alcohol enterprises by area were primarily identified from the Revenue licences data. In addition, details on the distribution/wholesale/brewery/distillery/craft enterprises were identified from a variety of sources, trade directories, industry association memberships and discussions with industry representatives. We are confident that the coverage of the relevant enterprises is wide. In the 2014 constituency report the employment levels in the different alcohol retail enterprises were estimated from a variety of sources including CSO data, previous DIGI research and other research from industry and other sources. This was not necessary in the 2016 report for pubs and bars because the sector has been broadened to cover the wider hospitality sector. The availability of various FI and CSO data, which includes bars and pubs, facilitate a different methodology. For the other drinks sectors not included in the hospitality sector, there was a direct survey/contact to identify locations and employments. In the cases where this did not result in the required information conservative estimates were made. The 2016 report estimates for these are retained in this report.

As was done in Foley 2016, this report assumes an average nation wide employment per full off licence of 3.5 persons. Wine only off-licences are assumed to have an average drinks related employment content of 0.1 persons.

The drinks industry is engaging in substantial capital investment. This includes substantial investment in Dublin South Central and Cork East as well as investment in smaller breweries and distilleries throughout the country. These jobs are not separately identified in the constituency profiles.

The wages impact in the 2016 Constituencies report was calculated as follows. The wages contribution of hospitality employment is based on the CSO earnings data which shows an average annual wages per employee (excluding proprietors and not adjusting for part-timers) of €16.7k in 2015 on average. The totals shown in the constituency reports are based on total hospitality (as defined by CSO) employment as opposed to employees. This means that the proprietors' payment was treated as equivalent to the average employee payment and the wages total includes an equivalent payment to the proprietors. A range of pay rates were applied to the different economic sectors in the previous constituencies reports.

With one exception the wage rates which were used in the 2016 constituencies report are retained for the calculations in this report. The 2016 average hospitality weekly earnings were €331.87 which is €17,257 (€17.3k rounded) per year. This latter figure was used instead of the €16.7k figure.

The main source of employment in the drinks sector is the public house and other bar sector, followed by the off-licence sector, manufacturing and distribution/wholesale. This is reflected in most of the constituencies but some constituencies such as Dublin South Central, Dublin South West, Cork East and Cork North Central have a significant employment from distribution/wholesale and/or manufacturing facilities.

The FI and CSO expenditure data refers to tourist expenditure as defined as overseas visitors and domestic trips with at least one overnight. Consequently, domestic tourist day trips are excluded. In addition the expenditure total from FI is not equivalent to national expenditure on hospitality goods and services. It excludes the "ordinary" expenditure on restaurants and bars and some hotel services. Therefore, the employment total from the CSO, referring to the accommodation and food and beverage services sector, represents a larger expenditure than the FI combination of domestic and overseas tourism expenditure. Therefore the CSO employment data do not correspond directly to the tourism expenditure. In the report "tourist" expenditure is based on the CSO and FI estimates. Unfortunately detailed updated data on total hospitality expenditure as opposed to tourist expenditure is not available and county level data are also not available.

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The 2016 constituency report estimated the 2015 agricultural contribution on the basis of 28 cent per litre of milk and a barley price of €170 per tonne. Prices have declined since then. This updated estimate is based on 2016 prices of 26 cent for milk and €155 for barley. Domestic sourced volumes are assumed to be unchanged for 2016. Consequently the estimated economic contribution from milk declines by 7.1%, rounded to 7%, compared with the previous constituency report and barley contribution drops by 8.8%, rounded to 9%.

The apportionment of milk and barley purchases follows the methodology of the previous constituency reports.

The following constituency and county data are estimates but the estimates are consistent with, and constrained by, the more accurate national, and in some cases regional, totals. Therefore any overstatement of employment in a constituency reflects an understatement in a different constituency.

There have been significant revisions to certain CSO data since the 2016 report. This is the primary reason for revising the 2016 report. Domestic tourism data has been extensively revised. Theses revisions were first published in August 2016.

As noted by the CSO, “from Quarter 1 2012 onwards, survey data for domestic travel is weighted to agree with population estimates broken down by *sex, age group* and *region* (NUTS 3). These population estimates are provided by the Quarterly National Household Survey (QNHS). These weightings are then applied to survey results. There have been revisions to domestic and outbound travel data from Quarter 1 2012 onwards as a result of the change to the weighting methodology. Revised data are published in the Quarter 1 2016 release” CSO background notes to Household Travel Survey”.

The revisions are substantial. For example in the 2016 constituencies report expenditure for domestic tourism was estimated by the CSO as €1.464b in 2014 while the revised figure for 2014 is €1.714b. Individual regional, county and constituency totals change also. A summary of the changes caused by the methodology change is shown below in Table 1.

Table 1 : Household Travel Survey - summary effect of revisions of data due to changed methodology

	2012	2013	2014	2015
Total Domestic - Trips '000 (data pre revision)	7,031	7,111	7,354	7,529
Total Domestic - Trips '000 (data revised)	8,291	8,413	8,991	9,125
% Difference	17.9%	18.3%	22.3%	21.2%
Total Domestic - Nights '000 (data pre revision)	20,120	20,649	21,204	20,931
Total Domestic - Nights '000 (data revised)	23,703	24,195	26,086	25,267
% Difference	17.8%	17.2%	23.0%	20.7%
Domestic - Expenditure €m (data pre revision)	1,345.4	1,373.2	1,464.0	1,529.9
Domestic - Expenditure €m (data revised)	1,514.2	1,533.0	1,713.5	1,725.3
% Difference	12.5%	11.6%	17.0%	12.8%

Source. Q1 2016 Household Travel Survey. Published in August 2016

In addition to the changes in the domestic expenditure estimates there have been different regional performances between 2015 and 2016 in the CSO employment totals. Between Quarter 4 2015 and Quarter 4 2016 total CSO hospitality employment increased from 143.1k to 148.0k. However, three regions experienced employment decreases, Midland (-12.8%), Mid-East (-4.1%) and South-East (-5.5%).

The CSO records the West's employment in hospitality as increasing by a very large 33.0%, or 3.7k persons. Border employment grew by 5.4%. Dublin's employment in the hospitality sector increased by 1.0% between 2015 and 2016. The Mid-West's hospitality employment increased by 9.3% in the same period. Hospitality employment in the South-West increased by 7.6%.

The regional increases in domestic tourism expenditure between 2015 and 2016 are also very varied. The CSO estimates, for example, that Mid-West expenditure increased by 25.9% from €135 million to €170 million. In contrast expenditure in the South-East decreased by 9.7% from €258 million to €233 million. Expenditure in the Midland region was unchanged at €66 million.

These different regional hospitality employment and domestic tourism performances between 2015 and 2016 result in significant changes in some county and constituency employment estimates compared with the previous constituency report.

3. Hospitality/Tourism Employment and Expenditure

The CSO publishes regional data on hospitality employment and on domestic tourism expenditure. Failte Ireland publishes regional and county data on domestic and overseas tourism expenditure. Table 1 contains the regional distribution of accommodation and food and beverage services employment. The CSO regional totals were adjusted for the broader category of hospitality employment by the ratio of 1.537 as explained earlier in the report.

Table 1 Regional distribution of hospitality/tourism employment Quarter 4 2016

Region	CSO accommodation and food and beverages services employment Quarter 4 2016, thousands	Estimated regional distribution of hospitality/tourism employment (tourism policy classification), thousands
Border	15.6	24.0
Midland	7.5	11.5
West	14.9	22.9
Dublin	50.3	77.3
Mid-East	14.1	21.7
Mid-West	10.6	16.3
South-East	13.7	21.1
South-West	21.3	32.7
Total	148.0	227.5

Source. CSO and own estimates

The CSO regional employment estimates were divided into county employments on the basis of the Failte Ireland estimated tourism expenditure in each county. Each county was assumed to have the same share of regional employment as of regional tourism expenditure.

The 2015 Failte Ireland (FI) county distribution of overseas tourism expenditure excluding carrier receipts was adjusted by the increase in overseas tourism expenditure which occurred between 2015 and 2016 according to CSO figures. This was 8.77%. This excludes the impact of different county growth rates in overseas expenditure. The totals are rounded to the nearest million euro.

Table 2 Estimated overseas tourism expenditure by county 2016

	Actual overseas tourism expenditure 2015 Failte Ireland	Estimated 2016 county overseas tourism expenditure, based on 2015/2016 total CSO increase
Carlow	32	35
Cavan	50	54
Clare	127	138
Cork	558	607
Donegal	83	90
Dublin	1726	1877
Galway	475	517
Kerry	234	255
Kildare	89	97
Kilkenny	45	49
Laois	18	20
Leitrim	15	16
Limerick	212	231
Longford	8	9
Louth	36	39
Mayo	80	87
Meath	44	48
Monaghan	25	27
Offaly	14	15
Roscommon	20	22
Sligo	51	55
Tipperary	66 (south 41, north 25)	72 (south 45, north 27)
Waterford	75	82
Westmeath	36	39
Wexford	65	71

Wicklow	82	89
Total	4265.3 (FI)	4639.4

Source. Failte Ireland and own estimates.

The total from the FI is €4265.3 million in 2015 compared to the CSO total of €4208 million. Based on the CSO growth in 2016 the FI county total adds to €4639.4 million in 2015 compared to the CSO total of €4577 million.

The FI county distribution of 2015 domestic tourism expenditure is shown below. Some counties were not individually identified due to data issues. The estimation of the individual county totals for domestic expenditure in these cases was based on their relative shares of the overseas tourism expenditure. These have to be updated to 2016. We calculated the 2016 domestic tourism expenditure by county by applying the CSO 2016 regional growth to each county within that region to the 2015 FI county breakdown. The regional totals which result from these county totals are different to the CSO regional totals although the national totals are the same in both cases.

Table 3 Domestic tourism expenditure by county, Failte Ireland 2015 and own estimates 2016

	Actual domestic tourism expenditure 2015 as revised by CSO for total and FI for county level	Estimated county level domestic tourism expenditure 2016 based on CSO regional increases
Carlow	11	10
Cavan	30	31
Clare	101	127
Cork	171	176
Donegal	76	78
Dublin	264	272
Galway	194	203
Kerry	203	209
Kildare	29	30
Kilkenny	30	28
Laois	14	14
Leitrim	9	9
Limerick	32	40
Longford	8	8
Louth	14	14
Mayo	93	97
Meath	24	25
Monaghan	10	10
Offaly	11	11
Roscommon	20	21
Sligo	61	63
Tipperary	38 (24 south, 14 north)	40 (south 25, north 15)
Waterford	62	56
Westmeath	28	28
Wexford	140	126
Wicklow	52	54
Total	1725	1776

Source. Failte Ireland and own estimates

The FI 2015 total and the CSO 2015 domestic tourism expenditure totals are the same.

The total tourism expenditure by county estimates (the combination of domestic and overseas expenditure) are shown in Table 4. The employment estimates were based on a county's expenditure share of the regional expenditure total. For example, the Border region's total tourism expenditure in 2016 estimated above was €486 million and according to the CSO the region had 15,600 accommodation and food services jobs. Cavan's total tourism spend was estimated at €85 million in 2016 which is 17.49% of the regional total. Based on a proportional employment share (in the absence of comprehensive data to the contrary), Cavan has 17.49% of the regions 15,600 tourism jobs (narrowly defined) which is 2700 jobs (rounded to nearest 100).

The county tourism employment and expenditure estimates for 2016 are presented below in Table 4.

Table 4 county estimates of domestic, overseas and total tourism/hospitality expenditure and tourism employment 2016

	Estimated overseas tourism expenditure 2016 € million	Estimated domestic tourism expenditure 2016 € million	Total tourism expenditure 2016 € million	Estimated hospitality employment 2016 (to nearest 100) (narrow CSO definition)
Carlow	35	10	45	1200
Cavan	54	31	85	2700
Clare	138	127	265	4900
Cork	607	176	783	13400
Donegal	90	78	168	5400
Dublin	1877	272	2149	50,300
Galway	517	203	720	11300
Kerry	255	209	464	7900
Kildare	97	30	127	5200
Kilkenny	49	28	77	2000
Laois	20	14	34	1800
Leitrim	16	9	25	800
Limerick	231	40	271	5000
Longford	9	8	17	900
Louth	39	14	53	1700
Mayo	87	97	184	2900
Meath	48	25	73	3000
Monaghan	27	10	37	1200
Offaly	15	11	26	1400
Roscommon	22	21	43	700
Sligo	55	63	118	3800
Tipperary	72	40	112	2600
Waterford	82	56	138	3600
Westmeath	39	28	67	3500
Wexford	71	126	197	5100
Wicklow	89	54	143	5900
Total	4640	1776	6416	148,000 (Q4)

Source. The county totals do not add exactly to the national totals due to the rounding in the calculations.

The county employment figures refer to the total hospitality sector including tourism and non-tourism elements of demand. The expenditure figures refer to tourism expenditure only. The wages and salaries figure refers to the total hospitality sector.

Table 5 Estimated overall hospitality direct economic impact, employment and wages/salaries, county 2016

	Tourism expenditure €m	Direct hospitality employment	Wages and salaries in hospitality € million
Carlow	45	1200	20.8
Cavan	85	2700	46.7
Clare	265	4900	84.8
Cork	783	13400	231.8
Donegal	168	5400	93.4
Dublin	2149	50,300	870.2
Galway	720	11300	195.5
Kerry	463	7900	136.7
Kildare	127	5200	90.0
Kilkenny	77	2000	34.6
Laois	34	1800	31.1
Leitrim	25	800	13.8
Limerick	271	5000	86.5
Longford	17	900	15.6
Louth	53	1700	29.4
Mayo	184	2900	50.2
Meath	73	3000	51.9
Monaghan	37	1200	20.8
Offaly	26	1400	24.2
Roscommon	43	700	12.1
Sligo	118	3800	65.7
Tipperary	112	2600	45.0
Waterford	138	3600	62.3
Westmeath	67	3500	57.1
Wexford	197	5100	88.2
Wicklow	143	5900	102.1

Total	6416	148,000 (Q4)	2560.1

Source. As noted in report

The county breakdown of alcohol licences is shown below in Table 6. This is derived from the list of individual licences provided by Revenue. Manufacturing is defined as licences for brewing, cider manufacture, distilling, compounding of spirits and rectifying of spirits. In situations where a manufacturing enterprise has more than one licence, the enterprise is counted only once. There are many alcohol wholesale licences. Revenue lists 544 of these licences. One of the large multiples lists many of its stores as wholesale distributors. These have been removed from the county totals presented in Table 6. Many of the manufacturers also have a wholesale licence and these have been retained in the totals. Cash and Carry and grocery wholesalers account for a substantial portion of the alcohol wholesale licences. These are also retained in the totals shown in Table 6.

Table 6 Alcohol Licences by County and type, September 2015

	publican	hotel	Special restaurant	Wine only restaurant	Full off licence	Wine only off licence	manufacturer	Wholesaler
Carlow	97	7	2	21	24	20	1	5
Cavan	190	10	6	10	21	40	2	5
Clare	291	18	8	52	36	36	3	9
Cork	954	63	52	231	200	170	16	48
Donegal	365	40	22	55	54	79	2	12
Dublin	773	135	162	677	463	268	10	184
Galway	475	65	14	128	96	109	6	29
Kerry	435	50	23	115	60	71	5	20
Kildare	183	22	13	72	78	55	4	12
Kilkenny	191	12	10	30	26	29	1	7
Laois	123	9	2	18	24	35	1	6
Leitrim	109	5	3	10	9	13	3	4
Limerick	360	23	14	68	65	64	2	14
Longford	90	1	2	8	12	21	1	4
Louth	182	10	15	38	56	41	5	20
Mayo	273	40	8	68	47	65	3	7
Meath	195	12	16	49	52	56	3	18
Monaghan	106	7	3	14	20	34	1	8
Offaly	126	5	2	18	25	20	2	1
Roscommon	203	4	5	15	18	21	1	2
Sligo	145	11	0	22	23	32	1	6
Tipperary	422	17	10	39	59	61	8	16
Waterford	220	15	14	53	45	41	4	5
Westmeath	169	10	11	33	36	36	1	12
Wexford	265	22	4	69	52	56	6	15
Wicklow	151	18	10	62	44	43	6	14
Total	7193	631	431	1975	1645	1516	98	483

Source. Derived from Revenue individual licence database

Conversion from county statistics totals to county Dail constituencies is not exact because several county constituencies are not equivalent to the geographic county. In these cases we use the geographic county.

Table 7 Estimated overall hospitality and drinks direct and multiplier economic impact, employment and wages/salaries, county 2016

County	Tourism expenditure €m	Direct hospitality employment	Wages and salaries in hospitality € million	Others employment not in hospitality eg off licences, distributors, wholesalers,	Drinks wages and salaries not in hospitality eg off licences, distributors	Total direct employment	Total direct wages	Total multiplier employment
Carlow	45	1200	20.8	187	4.5	1387	25.3	444
Cavan	85	2700	46.7	99	2.1	2799	48.8	957
Clare	265	4900	84.8	162	3.3	5062	88.1	1620
Cork	783	13400	231.8	1404	46.5	14804	278.3	4737
Donegal	168	5400	93.4	239	4.8	5639	98.2	1804
Dublin	2149	50,300	870.1	4547	162.9	54847	1033.0	17551
Galway	720	11300	195.5	486	10.6	11786	206.1	3772
Kerry	463	7900	136.7	303	6.5	8203	143.2	2625
Kildare	127	5200	90.0	337	7.4	5537	97.4	1772
Kilkenny	77	2000	34.6	138	3.3	2138	37.9	684
Laois	34	1800	31.1	121	2.6	1921	33.7	615
Leitrim	25	800	13.8	54	1.1	854	14.9	273
Limerick	271	5000	86.5	301	6.2	5301	92.7	1696
Longford	17	900	15.6	63	1.3	963	16.9	308
Louth	53	1700	29.4	332	7.8	2032	37.2	650
Mayo	184	2900	50.2	202	4.0	3102	54.2	993
Meath	73	3000	51.9	233	5.1	3233	57.0	1035
Monaghan	37	1200	20.8	100	2.1	1300	22.9	416
Offaly	26	1400	24.2	135	3.1	1535	27.3	491
Roscommon	43	700	12.1	72	1.4	772	13.5	247
Sligo	118	3800	65.7	102	2.2	3902	67.9	1289
Tipperary	112	2600	45.0	410	10.2	3010	55.2	963
Waterford	138	3600	62.3	185	3.5	3785	65.8	1211
Westmeath	67	3500	57.1	188	4.0	3688	61.0	1180
Wexford	197	5100	88.2	381	9.6	5481	97.8	1754
Wicklow	143	5900	102.1	214	4.0	6114	106.1	1956
Total	6416	148,000 (Q4)	2560.0					

Source. As noted in report

The employment, wages and expenditure related to hospitality economic activities in each Dail Constituency are shown in Table 8 and individual constituency profiles are presented in section 4 below.

Table 8 Dail Constituencies: Hospitality Employment, Wages and Tourist Expenditure 2016

constituency	Tourism expenditure €m	Direct hospitality employment	Wages and salaries in hospitality € million	Drinks employment not in hospitality eg off licences, distributors, wholesalers,	Drinks wages and salaries not in hospitality eg off licences, distributors	Total direct employment	Total direct wages	Total multiplier employment
Carlow-Kilkenny	122	3200	55.4	326	7.8	3526	63.2	1128
Cavan-Monaghan	122	3900	67.5	199	4.2	4099	71.7	1312
Clare	265	4900	84.8	162	3.3	5062	88.1	1620
Cork-E	172	2900	50.2	347	13.3	3247	63.5	1039
Cork-NC	177	3000	51.9	468	20.1	3468	72.0	1110
Cork-NW	131	2300	39.8	128	2.3	2428	42.1	777
Cork-SC	178	3000	51.9	331	8.3	3331	60.2	1066
Cork-SW	126	2200	38.1	130	2.5	2330	40.6	746
Donegal	168	5400	93.4	239	4.8	5639	98.2	1804
Galway-E	269	4200	72.7	164	3.4	4364	76.1	1396
Galway-W	451	7100	122.8	322	7.2	7422	130.0	2375
Kerry	463	7900	136.7	303	6.5	8203	143.2	2625
Kildare- N	72	3000	51.9	197	4.0	3197	55.9	1023
Kildare-S	55	2200	38.1	140	3.4	2340	41.5	749
Laois	34	1800	31.1	121	2.6	1921	33.7	615
Limerick city	156	2800	48.4	182	3.9	2982	52.3	954
Limerick-county	115	2200	38.1	119	2.3	2319	40.4	742
Longford--Westmeath	84	4400	76.1	251	5.3	4651	81.4	1488
Louth	53	1700	29.4	332	7.8	2032	37.2	650
Mayo	184	2900	50.2	202	4.0	3102	54.2	993
Meath-E	37	1500	26.0	128	2.9	1628	28.9	521
Meath-W	36	1500	26.0	105	2.2	1605	28.2	514
Offaly	26	1400	24.2	135	3.1	1535	27.3	491
Roscommon	43	700	12.1	72	1.4	772	13.5	247
Sligo-Leitrim	143	4600	79.6	156	3.3	4756	82.9	1522
Tipperary	112	2600	45.0	410	10.2	3010	55.2	963
Waterford	138	3600	62.3	185	3.5	3785	65.8	1211
Wexford	143	5900	102.1	214	4.0	6114	106.1	1956
Wicklow	197	5100	88.2	381	9.6	5481	97.8	1754
Dublin bay N	248	5800	100.3	228	6.8	6028	107.1	1929
Dublin bay S	195	4500	77.9	426	16.9	4926	94.8	1576
Dublin-C	150	3500	60.6	218	5.4	3718	66.0	1190
Dublin-F	239	5600	96.9	255	5.5	5855	102.4	1874
Dublin MW	185	4300	74.4	295	7.4	4595	81.8	1470
Dublin NW	152	3500	60.6	168	3.6	3668	64.2	1174
Dublin Rathdown	149	3400	58.8	260	6.8	3660	65.6	1171
Dublin SC	193	4500	77.9	1819	84.7	6319	162.6	2022
Dublin SW	245	5800	100.3	314	7.3	6114	107.6	1956
Dublin W	191	4400	76.1	365	14.4	4765	90.5	1525

Dun Laoghaire	200	4600	79.6	199	4.1	4799	83.7	1536