Fáilte Ireland
National Tourism Development Authority

TOURISM FACTS 2013

August 2014

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Expenditure by tourists visiting Ireland (including receipts paid to Irish carriers by foreign visitors) was estimated to be worth €4.5 billion in 2013, this represents growth of 12% on 2012. Combining spending by international tourists with the money spent by Irish residents taking trips here, total tourism expenditure in 2013 was estimated to be €5.9 billion.

Overseas tourist visits to Ireland in 2013 grew by 6% to 6.7 million. Short haul markets, Britain and Mainland Europe recorded modest growth of 4% each. North America and other long haul markets performed very strongly, increasing by 11% and 14% respectively.

Britain remains our biggest source market for overseas tourists, representing 43% of all such visits. The next biggest source market is Mainland Europe, which accounts for 35% of international volume. Some 16% of overseas tourists come from North America. The balance, 6%, come from other long haul markets.

Economic benefits

In 2013, out-of-state tourist expenditure, including spending by visitors from Northern Ireland, amounted to €3.6 billion. With a further €0.9 billion spent by overseas visitors on fares to Irish carriers, total foreign exchange earnings were €4.5 billion. Domestic tourism expenditure amounted to €1.4 billion making tourism in total a €5.9 billion industry in 2013.

Government earned estimated revenue of €1.4 billion through taxation of tourism, of which €1.1 billion came from foreign tourism. In 2012 the tourism industry accounted for 3.8% of all tax revenue.

In 2013 the value of exported goods and services was estimated at €184.1 billion of which €4.5 billion can be directly attributed to tourism, accounting for 2.4% of export earnings. Being largely service based, tourism goods have low import content in comparison to other exports.

Total out-of-state and domestic tourism expenditure of €5.9 billion in 2012 represented 4% of GNP in revenue terms.

Because tourism is characterised by the fact that consumption takes place where the service is available and tourism activity is frequently concentrated in areas which lack an intensive industry base, it is credited with having a significant regional distributive effect.

Direct employment in the tourism and hospitality industry

The Central Statistics Office's official count of direct employment in 'Accommodation and food service activities', a category which includes hotels, restaurants, bars, canteens and catering, was 137,700 in 2013 (7.2% of total employment). This estimate of employment is based on the CSO Household Survey and the jobs identified are defined as 'the respondent's main job' and include both full-time and part-time.
Source: CSO Quarterly National Household Survey

Drawing on an alternative approach, an estimate of all jobs in the tourism and hospitality industry based on past Fáilte Ireland surveys of businesses (full-time, part-time, seasonal/casual and not confined to 'main' job) indicates total employment in the sector at approximately 200,000. This estimate includes an additional category of tourism services and attractions which is not covered by the CSO.

Employment – some useful figures

Every €1mn of tourist expenditure helps to support 34 tourism jobs.
Every 55 international tourists help support one tourism job.
1,000 additional tourists support 18 jobs in the tourism industry.

Tourism Numbers 2009 – 2013

Where did Ireland's tourists come from?

Numbers (000s)	2009[1]	2010[2]	2011[3]	2012	2013
Britain	**3,034**	**2,759**	**2,799**	**2,722**	**2,870**
Mainland Europe	**2,323**	**2,011**	**2,184**	**2,247**	**2,346**
France	*393*	*344*	*381*	*384*	*409*
Germany	*411*	*381*	*411*	*437*	*466*
Italy	*274*	*214*	*214*	*240*	*226*
Spain	*255*	*214*	*233*	*239*	*249*
Netherlands	*na*	*120*	*133*	*137*	*148*
Belgium	*na*	*65*	*83*	*81*	*95*
Denmark	*na*	*43*	*46*	*42*	*51*
Sweden	*na*	*53*	*57*	*70*	*72*
Switzerland	*na*	*53*	*68*	*78*	*73*
Austria	*na*	*41*	*44*	*46*	*51*
Norway	*na*	*45*	*51*	*48*	*50*
Poland	*na*	*166*	*161*	*159*	*152*
All Other Europe	*na*	*270*	*302*	*284*	*306*
North America	**920**	**864**	**904**	**940**	**1,039**
USA	*835*	*781*	*811*	*833*	*924*
Canada	*85*	*83*	*93*	*107*	*115*
Rest of World	**301**	**311**	**353**	**378**	**431**
Australia, New Zealand & Other Oceania	*130*	*135*	*143*	*158*	*191*
Other Areas	*171*	*176*	*210*	*219*	*240*
Total Overseas	**6,578**	**5,945**	**6,240**	**6,286**	**6,686**
Northern Ireland	n/a	n/a	1,416	1,264	1,574
Total out-of-state	**n/a**	**n/a**	**7,656**	**7,550**	**8,260**
Domestic trips[4]	8,340	7,300	7,169	7,031	7,111

Source surveys are designed to measure area of residence groupings (bold figures). Figures in italics are indicative of approximate overall market size but do not provide a sufficient level of precision to accurately reflect absolute market size or trends over time.

Source: CSO/Fáilte Ireland/TSB, NISRA

1 Revised March 2012

2 Revised February 2014

3 Revised by CSO in 2013

4 2010 and 2011 revised by CSO in 2013

Tourism Revenue 2009 – 2013

How much money did they spend?

Revenue (€m)	2009[5]	2010	2011[6]	2012	2013
Britain	**1,035.8**	**879.4**	**858.3**	**858.0**	**890.9**
Mainland Europe	**1,348.0**	**1,133.9**	**1,110.8**	**1,060.5**	**1,228.2**
North America	**724.6**	**695.1**	**677.4**	**745.7**	**829.0**
Other Overseas	**311.3**	**290.4**	**272.8**	**291.6**	**367.7**
TOTAL OVERSEAS	**3,419.7**	**2,998.8**	**2,919.4**	**2,955.8**	**3,315.7**
Northern Ireland[7]	n/a	n/a	295.8	284.3	304.7
TOTAL OUT-OF-STATE	**n/a**	**n/a**	**3,215.2**	**3,240.1**	**3,620.4**
Carrier receipts[8]	524.0	580.0	626.0	856.0	865.0
Overseas same-day visits	27.0	25.0	36.0	34.0	35.0
TOTAL FOREIGN EXCHANGE EARNINGS[9]	**n/a**	**n/a**	**3,877.2**	**4,041.1**	**4,520.4**
Domestic trips[10]	1,389.8	1,560.5	1,415.9	1,345.4	1,373.3
TOTAL TOURISM REVENUE	**5,360.5**	**5,164.3**	**5,293.1**	**5,386.5**	**5,893.7**

Source surveys are designed to measure area of residence groupings (bold figures).

Northern Ireland resident expenditure data provided in St£ from 2009 onwards, average annual exchange rates supplied by Central Bank of Ireland.

Source: CSO/Fáilte Ireland/TSB NISRA/Central Bank of Ireland

Revenue – some useful figures

Per diems – spend per person per day

Overseas visitors	€63
Overseas holidaymakers	€82
Domestic overnight trips	€67
Domestic day trips	€40

For every euro spent on tourism (domestic and overseas), 24.5c is generated in tax.

5 Revised March 2012

6 Revised by CSO in 2013

7 Source: NISRA GBP; Euro exchange rates 2011 – 0.86788, 2012 – 0.81087 Source: Central Bank of Ireland

8 2012 carrier receipts revised March 2014

9 Foreign exchange earnings in 2009 and 2010 exclude revenue from Northern Ireland visitors

10 2010 and 2011 revised by CSO in 2013

Regional Visits and Revenue 2013

Where did visitors go in 2013?

Numbers (000s) ***Revenue (€m)***	**Overseas Tourists**	**Northern Ireland[11]**	**Domestic Trips**	**Total**
Dublin	3,998	460	1,344	5,802
	1,401.4	*87.0*	*255.8*	*1,744.2*
East & Midlands	772	178	932	1,882
	286.9	*28.7*	*148.5*	*464.1*
South-East	785	76	957	1,818
	203.7	*14.2*	*178.6*	*396.5*
South-West	1,860	107	1,411	3,378
	615.9	*21.6*	*313.8*	*951.3*
Shannon	931	42	669	1,642
	250.7	*5.5*	*107.7*	*363.9*
West	1,203	115	1,168	2,486
	381.2	*38.8*	*265.2*	*685.2*
North-West	506	596	630	1,732
	176.0	*109.0*	*103.5*	*388.5*

Source: CSO/Fáilte Ireland NISRA/Central Bank of Ireland

Overseas Tourists in 2013

How did overseas tourists spend their money in Ireland?

Breakdown of Spend in Ireland (%)	**Total**	**Britain**	**Mainland Europe**	**North America**	**Rest of World**
Bed & board	30	32	34	27	27
Other food & drink	21	24	25	16	30
Sightseeing/entertainment	13	15	13	13	9
Internal transport	13	8	12	16	10
Shopping	12	9	12	11	22
Miscellaneous	11	12	4	17	2

When did they arrive?

Seasonality (%)	**Total**	**Britain**	**Mainland Europe**	**North America**	**Rest of World**
January-March	18	19	18	15	16
April	8	8	9	7	6
May	10	9	10	10	9
June	9	8	9	13	11
July	11	10	11	13	12
August	12	13	12	12	13
September	9	9	9	11	11
October-December	23	25	21	19	23

Source: Fáilte Ireland estimates based on CSO

11 Source: NISRA GBP; Euro exchange rates 2013 – 0.84926 Source: Central Bank of Ireland

How did they arrive/depart?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Air					
From Britain	39	71	6	22	57
From Mainland Europe	36	1	87	15	29
Transatlantic	11	1	1	58	2
Sea					
From Britain	11	20	4	3	9
From Mainland Europe	1	*	3	-	*
Via N. Ireland	4	7	1	2	3

Source: CSO (indicates less than 0.5 percent)*

Where did they stay? (distribution of bednights)

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Hotels	18	25	12	27	12
Guesthouses/B&Bs	7	5	7	9	4
Self-catering	29	7	33	29	47
Caravan & camping	1	1	1	*	*
Hostels	3	1	5	3	4
Friends/relatives	24	51	17	20	18
Other *Source: SOT*	18	10	25	12	15
Nights (Million) *Source (CSO)*	52.3	15.0	21.9	9.6	5.8

(indicates less than 0.5 percent)*

What activities did they engage in?

	Overseas Participants (000s)
Hiking/cross country walking	742
Cycling	241
Golf	204
Angling	127
Equestrian	99

What was their main reason for visiting Ireland?

(000s)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	3,144	979	1,227	718	220
Visit friends/relatives	2,096	1,296	496	176	128
Business	1,088	549	388	92	58
Other	357	46	235	53	24

Source: CSO and NISRA

In 2013 just over a third (37%) of those coming to Ireland to visit friends/relatives were born in Ireland and a further 21% had other family ties to Ireland.

Overseas Holidaymakers 2013

Holidaymakers in this section are defined as visitors who stated that their primary purpose for visiting Ireland was a holiday.

What was the total number of holidaymakers in 2013?

Holidaymakers (000s)	2009	2010	2011	2012	2013
Britain	953	896	961	941	979
Mainland Europe	1,090	971	1,041	1,120	1,227
North America	567	546	591	634	716
Rest of World	158	137	167	184	215
Total	2,769	2,550	2,760	2,879	3,137

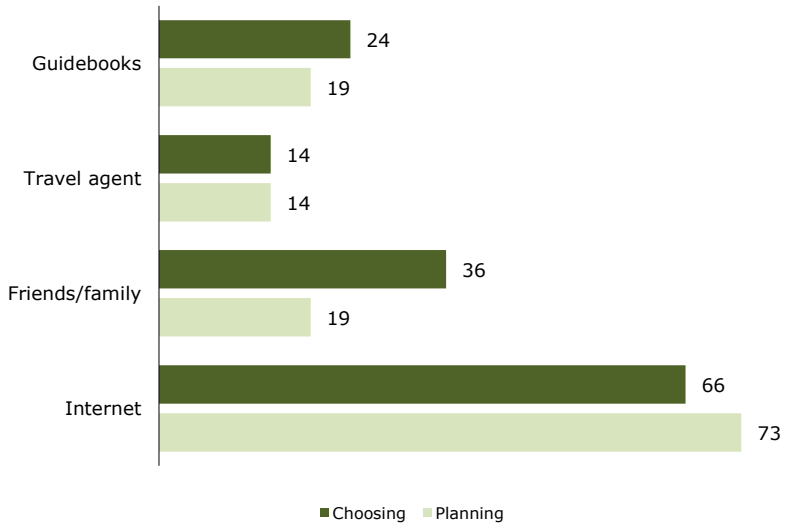
Source: CSO and NISRA

Type of holidays taken in Ireland (000s) in 2013[12]

Holidaymakers (000s)	Total	Britain	Mainland Europe	North America	Rest of World
Hired car - paid accommodation	620	104	207	250	59
Touring - paid accommodation	471	155	151	134	31
Dublin break	711	166	376	108	61
Youth budget	342	78	164	54	46

Source: Fáilte Ireland SOT

Sources of information for choosing/planning a holiday in Ireland (%)



Source: Fáilte Ireland's Port Survey of Holidaymakers 2013

How did they arrange their holiday?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Package*	17	9	16	27	13
Independent	83	91	84	73	87

** Prepaid an inclusive price for fares to/from Ireland and at least one other element of the holiday.*
Source: Fáilte Ireland's Survey of Overseas Travellers

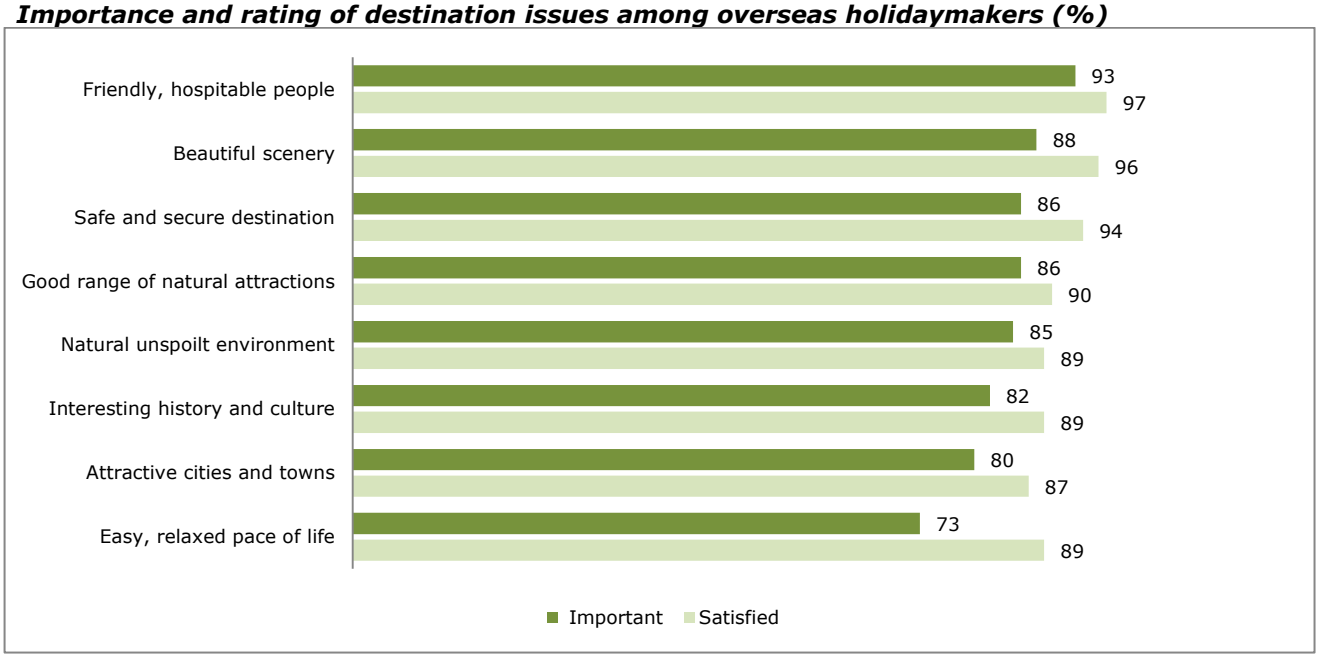
12 Paid accommodation refers to hotels, guesthouses, and B&Bs

What were the characteristics of holidaymakers to Ireland (%)?

Experience of Ireland		Use of car		Age		Social class		Party composition	
First visit	63	Car brought	11	Under 25 years	19	Managerial/professional (AB)	35	Alone	24
Repeat	34	Car hired	29	25-34 years	21	White collar (C1)	49	Couple	43
Irish-born	4	Car not used	61	35-44 years	13	Skilled worker (C2)	14	Family	15
				45+ years	46	Unskilled worker (DE)	2	Other adult group	19

Source: Fáilte Ireland's Survey of Overseas Travellers

Importance and rating of destination issues among overseas holidaymakers (%)



Source: Fáilte Ireland's Port Survey of Overseas Holidaymakers 2013

Domestic Tourism in 2013[13]

Domestic trips (000s) by purpose of travel

	2009	2010	2011	2012	2013
Holiday trips	4,037	3,978	3,696	3,374	3,460
- *Long (4+ nights)*	*1,104*	*1,151*	*1,040*	*780*	*920*
- *Short (1-3 nights)*	*2,933*	*2,828*	*2,656*	*2,594*	*2,541*
Visiting friends/relatives trips	2,712	1,997	2,231	2,374	2,452
Business trips	600	370	350	322	341
Other trips	990	955	891	960	858
Total trips	**8,340**	**7,300**	**7,169**	**7,031**	**7,111**

Source: CSO Household Travel Surveys 2009-2013

Domestic expenditure (€m) by purpose of travel

	2009	2010	2011	2012	2013
Holiday trips	843.3	971.9	864.9	784.8	840.3
- *Long (4+ nights)*	*372.5*	*394.2*	*348.6*	*290.9*	*348.0*
- *Short (1-3 nights)*	*470.8*	*577.7*	*516.3*	*493.9*	*492.2*
Visiting friends/relatives trips	171.1	270.5	265.9	269.6	266.7
Business trips	136.2	85.9	76.9	75.7	78.4
Other trips	239.2	232.2	208.2	215.3	187.9
Total expenditure	**1,389.8**	**1,560.5**	**1,415.9**	**1,345.4**	**1,373.3**

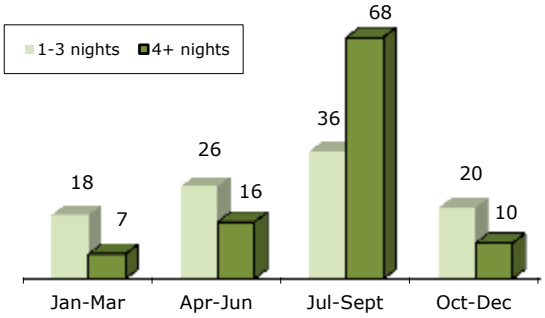
Source: CSO Household Travel Surveys 2009-2013

Accommodation bednights domestic holidaymakers (%)

	2009	2010	2011	2012	2013
Hotels	36	32	32	39	36
Guesthouse/B&Bs	3	3	3	4	3
Caravan/camping	10	17	13	11	14
Self-catering	18	17	20	18	20
Holiday home	20	19	20	13	16
Friends/relatives	13	10	9	13	10
Other	2	2	2	2	2

Source: CSO Household Travel Surveys 2009-2013

Seasonality of holidaymakers (%) 2013 by length of stay



Source: CSO Household Travel Survey 2013

[13] 2010 – please note there is a discontinuity in domestic tourism figures between 2010 and previous years due to changes in methodology. Also 2010 and 2011 were revised in July 2013.

Activities engaged in by domestic holidaymakers (%)

Houses/castles	24
Hiking/walking	24
Watersports	22
National parks	20
Visits to spas	20
Heritage/ interpretive centres	15
Gardens	15
Museums/art galleries	13
Golf	8
Cycling	8
Angling	4
Attending horse racing	4
Equestrian pursuits	2

Source: Fáilte Ireland Domestic Omnibus 2013

The Tourism Product

Accommodation in 2013

	Premises	**Rooms**
Hotels	835	57,362
Guesthouses	253	3,119
Farmhouses and town & country homes*	1,616	6,896
Self-Catering (group scheme only - units)	3,499	n/a
Hostels (beds)	121	8,424
Caravan & camping (pitches)	93	5,519

Source TAMS, TAA.
** includes specialist and pub accommodation*

Accommodation occupancy in 2013

	%
Hotel Room Occupancy	61
Guesthouse Room Occupancy	52
B&Bs Room Occupancy	31
Hostels Bed Occupancy	46
Group Scheme Self-Catering Unit Occupancy	43

Source: Fáilte Ireland Occupancy Surveys

Attendance at popular visitor attractions in Ireland 2013

Top Fee-Charging Attractions			Top Free Attractions		
Name of Attraction	**County**	**2013**	**Name of Attractions**	**County**	**2013**
Guinness Storehouse	Dublin	1,157,090	The National Gallery of Ireland	Dublin	641,572
Dublin Zoo	Dublin	1,026,611	National Botanic Gardens	Dublin	550,000
Cliffs of Moher Visitor Experience	Clare	960,134	Farmleigh	Dublin	435,476
National Aquatic Centre	Dublin	858,031	National Museum of Ireland - Archaeology, Kildare St	Dublin	404,230
Book of Kells	Dublin	588,723	Newbridge Silverware	Kildare	350,000
Tayto Park	Meath	435,000	Science Gallery at Trinity College Dublin	Dublin	339,264
St Patrick's Cathedral	Dublin	410,000	National Museum of Ireland - Natural History, Merrion St	Dublin	284,323
Fota Wildlife Park	Cork	365,396	The National Library of Ireland	Dublin	260,152
Blarney Castle	Cork	365,000	National Museum of Ireland - Decorative Arts & History, Collins Barracks	Dublin	251,226
Kilmainham Gaol	Dublin	326,207	Chester Beatty Library	Dublin	250,659
Bunratty Castle & Folk Park	Clare	285,013	Connemara National Park	Galway	169,845
Old Jameson Distillery	Dublin	267,836	Galway City Museum	Galway	157,603

All estimates are based on information from the CSO's Country of Residence Survey (CRS), Passenger Card Inquiry (PCI) Survey and Household Travel Survey (HTS), NISRA's Northern Ireland Passenger Survey (NIPS), Fáilte Ireland's Survey of Overseas Travellers (SOT), Visitor Attitudes Survey, Hotel Survey, Accommodation Occupancy Survey and Domestic Omnibus Survey.

Issued By:

Research, Evaluation & Business Metrics
Fáilte Ireland
Amiens St
Dublin 1

Tel: 01-884 7700
Website: www.failteireland.ie
Email: research.statistics@failteireland.ie

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Tourism Ireland is responsible for marketing the Island of Ireland overseas. Information on Tourism Ireland's marketing activities and the performance of overseas tourism to the island of Ireland is available on www.tourismireland.com/corporate/