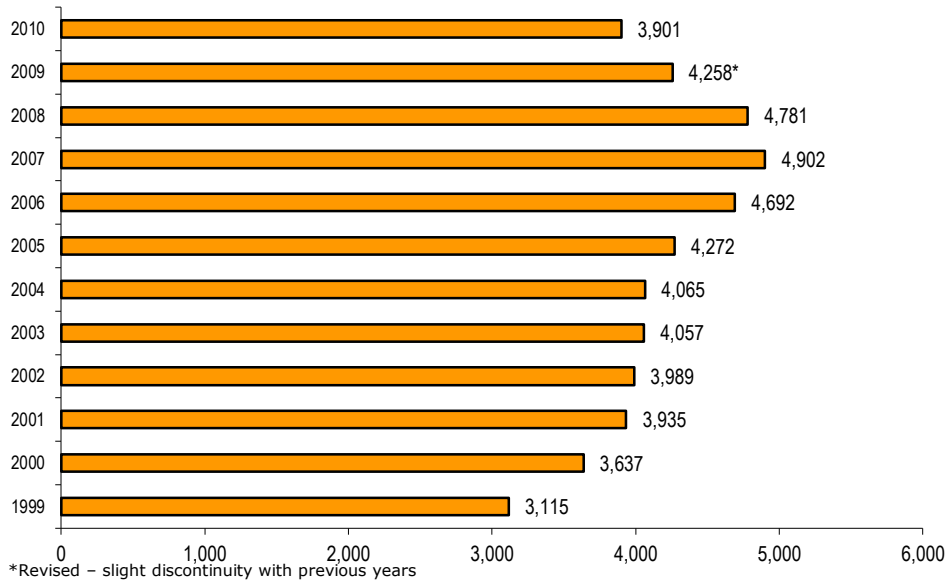


TOURISM FACTS 2010

Expenditure by visitors to Ireland (including receipts paid to Irish carriers by foreign visitors) was estimated to be worth €3.9 billion in 2010, this represents a drop of 9% on 2009.

Total Foreign Exchange Earnings 1999-2010



Overseas tourist visits to Ireland in 2010 fell by 10% to 5.9 million. Tourist numbers from Mainland Europe fell by 13%, Britain declined by 9%, and North America decreased by 6%. The disruption caused by volcanic ash in April of 2010 had a negative effect on incoming tourism.

The fall of 10% in tourist arrivals to Ireland is in contrast to growth of 6% in world arrivals as reported by the World Tourism Organisation. International tourist arrivals in Europe in 2010 increased by 3% when compared to 2009 and Northern Europe, which includes Ireland, saw an increase of just 0.2%.

Economic Benefits

In 2010, out-of-state tourist expenditure, including spending by visitors from Northern Ireland, amounted to €3.3 billion. With a further €0.6 billion spent by overseas visitors on fares to Irish carriers, total foreign exchange earnings were €3.9 billion. Domestic tourism expenditure amounted to €1.9 billion making tourism in total a €5.8 billion industry in 2010.

Government earned estimated revenue of €1.4 billion through taxation of tourism, of which €0.9 billion came from foreign tourism. In 2010 the tourism industry accounted for 3.0% of tax revenue.

In 2010 the value of exported goods and services was estimated at €158.4 billion of which €3.9 billion can be directly attributed to tourism, accounting for 2.5% of exports. Being largely service based, tourism goods have low import content in comparison to other exports.

Total out-of-state and domestic tourism expenditure of €5.8 billion in 2010 represented some 4.4% of GNP in revenue terms. In income terms, total tourism spend made up €4.7 billion as 82c in every euro of tourism spending generates income in Ireland. The 'missing' share of spending leaks out in the form of expenditure on imports.

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 122,600 in 2010 (6.6% of total employment). This estimate of employment is based on interviews with individuals in the household 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 a Fáilte Ireland survey of businesses (full-time, part-time, seasonal/casual and not confined to 'main' job) indicates total employment in the sector at approximately 180,000. This estimate includes an additional category of tourism services and attractions which is not covered by the CSO.

Tourism Numbers 2007 – 2010

Where did Ireland's tourists come from?

Numbers (000s)	2007	2008	2009 ¹	2010
Britain	3,776	3,579	3,034	2,759
Mainland Europe	2,577	2,561	2,323	2,011
Germany	436	456	411	381
France	394	412	393	344
Italy	265	232	274	214
Spain	249	243	255	214
Belgium/Netherlands, Luxembourg	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	195
Norway, Sweden, Finland & Denmark	248	217	167	159
Other Europe	984	1,001	823	503
North America	1,071	953	920	864
USA	975	849	835	778
Canada	96	103	85	86
Rest of World	316	343	301	311
Australia, New Zealand, & Other Oceania	147	157	130	135
Other Areas	169	186	171	176
Total Overseas	7,739	7,436	6,578	5,945
Northern Ireland	638	636	985 ²	1,189
Total Out-of-State	8,377	8,072	7,563	7,134
Domestic Trips	7,942	8,339	8,340	8,614 ³

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, slight discontinuity with figures from CSO prior to 2009

² Not comparable to previous years due to a change in methodology

³ Not comparable to previous years due to a change in methodology

Tourism Revenue 2007 – 2010

How much money did they spend?

Revenue (€m)	2007	2008	2009 ⁴	2010
Britain	1,387.3	1,348.5	1,035.8	879.4
Mainland Europe	1,404.7	1,517.0	1,348.0	1,133.9
<i>Germany</i>	<i>234.5</i>	<i>287.8</i>	<i>211.2</i>	<i>235.2</i>
<i>France</i>	<i>200.3</i>	<i>253.4</i>	<i>236.9</i>	<i>195.9</i>
<i>Italy</i>	<i>n.a.</i>	<i>n.a.</i>	<i>n.a.</i>	<i>111.3</i>
<i>Spain</i>	<i>n.a.</i>	<i>n.a.</i>	<i>n.a.</i>	<i>127.9</i>
<i>Other Europe</i>	<i>969.9</i>	<i>975.8</i>	<i>899.8</i>	<i>463.6</i>
North America	823.3	667.7	724.6	695.1
Other Overseas	329.3	315.8	311.3	290.4
TOTAL OVERSEAS	3,944.6	3,849.0	3,419.7	2,998.8
Northern Ireland	202.8	210.5	287.4 ⁵	297.3
TOTAL OUT-OF-STATE	4,147.4	4,059.5	3,707.1	3,296.1
Carrier Receipts	726.0	686.0	524.0	580.0
Overseas Same-day Visits	28.6	35.5	27.0	25.0
TOTAL FOREIGN EXCHANGE EARNINGS	4,902.0	4,781.0	4,258.1	3,901.1
Domestic Trips	1,551.0	1,546.0	1,389.8	1,870.2 ⁶
TOTAL TOURISM REVENUE	6,453.0	6,327.0	5,647.9	5,771.3

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

Northern Ireland resident expenditure data provided in St£ from 2009 onwards, average annual exchange rates supplied by Central Bank of Ireland for 2009 and 2010.

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

⁴ Revised March 2012, slight discontinuity with figures from CSO prior to 2009

⁵ Not comparable to previous years due to a change in methodology

⁶ Not comparable to previous years due to a change in methodology

Where did tourists go in 2010?

Numbers (000s) Revenue (€m)	Britain	Mainland Europe	North America	Other Areas	Overseas Tourists	Northern Ireland	Domestic Trips	Total
Dublin	1,202	1,362	610	239	3,412	330	1,389	5,131
	234.6	487.1	258.5	172.6	1,152.8	72	266.8	1,491.6
East & Midlands	377	247	92	29	746	103	862	1,711
	127.1	106.7	38.1	39.4	311.3	28	164.6	503.9
South-East	276	197	142	58	673	13	1,206	1,892
	85.3	51.7	29.5	15.9	182.4	6	259.1	447.5
South-West	486	521	342	99	1,448	55	1,894	3,397
	165.3	218.3	150.4	26.1	560.1	20	456.9	1,037.0
Shannon	236	255	220	50	761	46	940	1,747
	60.8	94.2	79.7	12.9	247.6	9	175.7	432.3
West	376	429	258	72	1,136	102	1,548	2,786
	118.2	124.2	121.4	19.4	383.2	34	379.9	797.1
North-West	292	142	70	20	523	557	775	1,855
	88.1	51.7	17.6	4.0	161.4	128	167.2	456.6

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

Overseas Tourists 2010

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	25	20	28	28	25
Other Food & Drink	35	39	33	32	34
Sightseeing/ Entertainment	7	6	7	9	7
Internal transport	11	10	11	12	10
Shopping	16	15	17	14	19
Miscellaneous	6	11	4	5	4

When did they arrive?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
January-March	18	20	18	15	17
April	7	8	7	6	5
May	8	7	9	9	7
June	10	9	9	13	11
July	11	10	13	13	12
August	12	12	12	12	11
September	10	10	9	11	11
October-December	23	24	23	21	25

Source: CSO

How did they arrive/depart?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Air					
From Britain	39	66	7	26	56
From Mainland Europe	33	1	84	18	34
Transatlantic	9	1	1	53	2
Sea					
From Britain	14	25	5	2	4
From Mainland Europe	1	*	2	*	*
Via N. Ireland	4	7	1	2	4

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	14	17	10	24	8
Guesthouses/ B&Bs	7	5	7	9	6
Rented	25	10	28	29	38
Caravan & Camping	1	2	2	*	*
Hostels	4	1	6	5	3
Friends/ Relatives	34	60	28	21	25
Other	15	5	19	12	20
Source: SOT					
Nights (Million)					
Source (CSO)	49.4	15.0	21.0	8.8	4.6

(* indicates less than 0.5 percent)

What activities did they engage in?

	Overseas Participants (000s)	Spend in Ireland (€mn)
Hiking/Cross Country Walking	713	656
Golf	160	152
Angling	127	89
Cycling	168	182
Equestrian	62	65

What was their main reason for visiting Ireland?

(000s)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	2,549	896	971	546	137
Visit Friends/ Relatives	2,054	1,289	469	178	119
Business	877	493	269	79	36
Other	464	81	303	61	19

Source: CSO and NISRA

Overseas Holidaymakers 2010

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 2010?

Holidaymakers (000s)	2005	2006	2007	2008	2009	2010
Britain	1,662	1,765	1,778	1,596	953	896
Mainland Europe	950	1,114	1,378	1,216	1,091	971
North America	614	670	687	614	567	546
Rest of World	139	163	150	164	158	137
Total	3,365	3,710	3,993	3,592	2,769	2,549

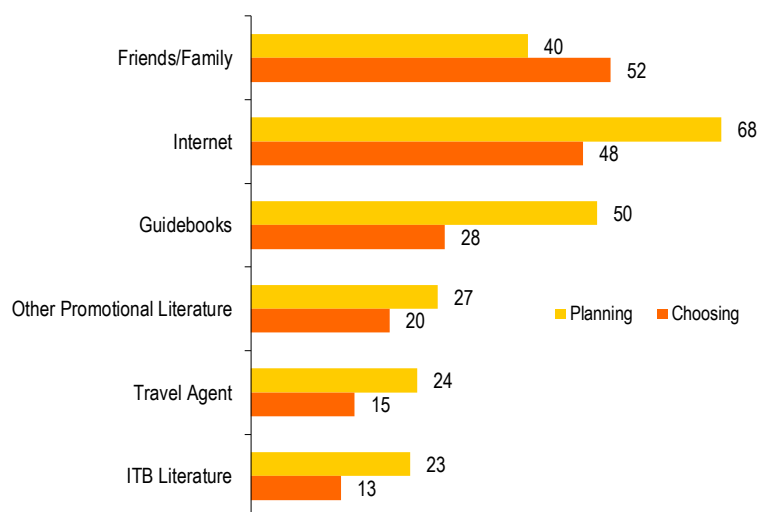
Source: CSO and NISRA

Type of Holidays Taken in Ireland (000s) in 2010⁷

Holidaymakers (000s)	Total	Britain	Mainland Europe	North America	Rest of World
Hired Car - Paid Accommodation	531	100	209	182	41
Touring - Paid Accommodation	376	124	135	92	26
Dublin Break	542	289	149	74	30
Youth Budget	261	54	130	56	22

Source: Fáilte Ireland SOT

Source of Information for Choosing/Planning a Holiday in Ireland (%)



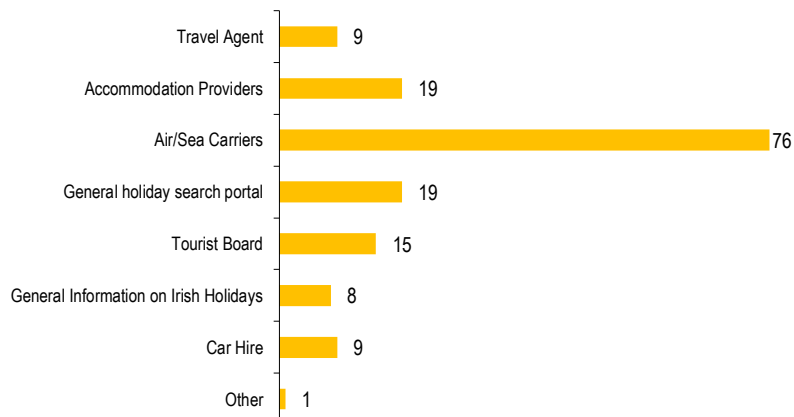
Source: Fáilte Ireland's Visitor Attitudes Survey

⁷ Paid accommodation refers to hotels, guesthouses, B&B.....

How do overseas holidaymakers to Ireland use the internet?

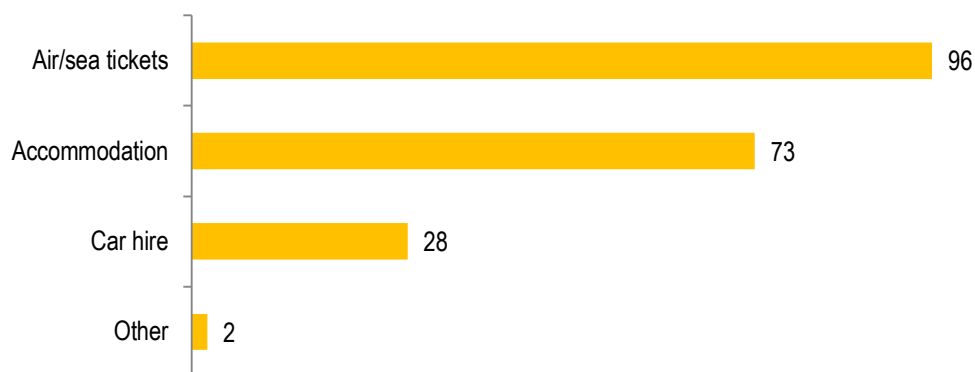
78% of overseas holidaymakers to Ireland use the internet to book and/or purchase some element of their holiday to Ireland. The charts below show how they used the internet in 2010.

Websites visited (%) 2010



Source: Fáilte Ireland's Survey of Overseas Travellers

Booked/purchased over internet (%) 2010



Source: Fáilte Ireland's Survey of Overseas Travellers

How did they arrange their holiday?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Package*	20	10	17	31	24
Independent	80	90	83	69	76

* 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

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

Experience of Ireland	Use of Car	Age	Social Class	Party Composition	
First Visit	62	Car Brought 10	Under 25 years 21	Managerial/Professional (AB) 24	Alone 21
Repeat	35	Car Hired 32	25-34 years 22	White Collar (C1) 59	Couple 42
Irish-born	3	Car Not Used 58	35-44 years 15	Skilled Worker (C2) 14	Family 15
			45+ years 43	Unskilled Worker (DE) 3	Other Adult Group 22

Source: Fáilte Ireland's Survey of Overseas Travellers

Importance and Rating of Destination Issues (%)



Source: Fáilte Ireland's Visitor Attitudes Survey

Domestic Tourism 2010⁸

Domestic Trips (000s) by Purpose of Travel

	2007	2008	2009	2010
Holiday Trips	4,271	4,398	4,037	4,604
- Long (4+ nights)	1,286	1,150	1,104	1,412
- Short (1-3 nights)	2,984	3,248	2,933	3,192
VFR Trips	2,420	2,656	2,712	2,410
Business Trips	711	658	600	485
Other Trips	541	627	990	1,116
Total Trips	7,942	8,339	8,340	8,614

Domestic Expenditure (€m) by Purpose of Travel

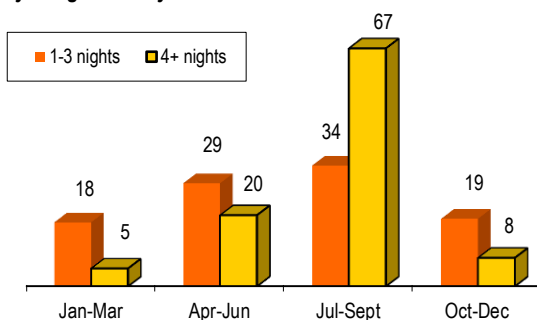
	2007	2008	2009	2010
Holiday	1,028.1	1,027.9	843.3	1,167.8
- Long (4+ nights)	473.4	428.6	372.5	506.2
- Short (1-3 nights)	554.7	599.3	470.8	661.2
VFR Trips	219.7	215.7	171.1	321.0
Business Trips	194.1	162.8	136.2	108.7
Other Trips	109.1	139.6	239.2	272.7
Total Expenditure	1,551.0	1,546.0	1,389.8	1,870.2

Accommodation Bednights Domestic Holidaymakers (%)

	2007	2008	2009	2010
Hotels	33	35	36	33
Guesthouse/B&Bs	5	4	3	2
Caravan/Camping	12	12	10	15
Rented	19	17	18	19
Holiday Home	16	18	20	20
Friends/Relatives	11	11	13	10
Other	4	3	2	1

⁸ 2010 – please note there is a discontinuity in domestic revenue between 2010 and previous years due to changes in methodology.

Seasonality of Holidaymakers (%) 2010 by Length of Stay



Activities Engaged In by Domestic Holidaymakers (%)

	2010
Watersports	21
Hiking/Walking	20
Visits to Spas	19
Houses/ Castles	18
National Parks	18
Gardens	15
Heritage/ Interpretive Centres	14
Museums/Art Galleries	10
Golf	8
Cycling	6
Angling	4
Equestrian Pursuits	3

The Tourism Product

Accommodation in 2010

	Premises	
Hotels (rooms)	902	60,217
Guesthouses (rooms)	303	3,643
Farmhouses and Town & Country Homes* (rooms)	2,246	9,414
Self-Catering (Group Scheme only - Units)	4,241	
Hostels (beds)	130	8,123
Caravan & Camping (pitches)	95	5,550

Source TAMS, TAA.

* includes specialist and pub accommodation

Accommodation occupancy in 2010

	%
Hotel Room Occupancy	58
Guesthouse Room Occupancy	43
B&Bs Room Occupancy	27
Hostels Bed Occupancy	44
Group Scheme Self-Catering Unit Occupancy	35

Source: Fáilte Ireland Occupancy Surveys

Attendances at popular visitor attractions in Ireland 2010

Fee-charging Attractions			Free Attractions		
Name of Attraction	County	2010	Name of Attraction	County	2010
Dublin Zoo	Dublin	963,053	The National Gallery of Ireland	Dublin	736,855
Guinness Storehouse	Dublin	930,000	National Botanic Gardens	Dublin	533,120
National Aquatic Centre	Dublin	721,871	Irish Museum of Modern Art	Dublin	408,000
Cliffs of Moher Visitor Experience	Clare	720,574	National Museum of Ireland - Archaeology	Dublin	366,201
Book of Kells	Dublin	469,674	Farmleigh	Dublin	267,904
Fota Wildlife Park	Cork	377,004	National Museum of Ireland - Decorative Arts & History	Dublin	258,812
Blarney Castle	Cork	308,000	National Museum of Ireland – Natural History	Dublin	253,597
St Patrick's Cathedral	Dublin	300,211	Holy Cross Abbey	Tipperary	230,000
Kilmainham Gaol	Dublin	278,108	Science Gallery	Dublin	220,000
Bunratty Castle & Folk Park	Clare	263,336	Chester Beatty Library	Dublin	206,653

Source: Fáilte Ireland Visitor Attractions Survey

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

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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/