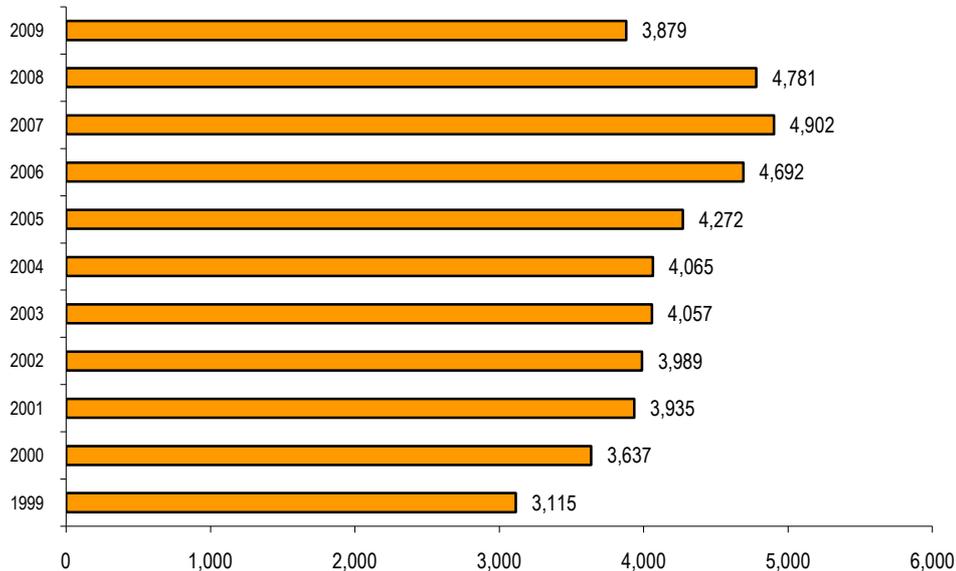


TOURISM FACTS 2009

Tourism Performance in 2009

Expenditure by visitors to Ireland (including receipts paid to Irish carriers by foreign visitors) was estimated to be worth €3.9 billion in 2009, this represents a drop of 19% on 2008.

Total Foreign Exchange Earnings 1999-2009



Overseas tourist visits to Ireland in 2009 fell by 12% to 6.6 million. Tourist numbers from Britain declined by 15%, Mainland Europe fell by 9%, and North America decreased by 6%, due to the global economic downturn and unfavourable exchange rates with the euro.

The fall of 12% in tourist arrivals to Ireland compares to a drop of 4% in world arrivals as reported by the World Tourism Organisation. International tourist arrivals in Europe in 2009 showed a drop of 6% when compared to 2008 and Northern Europe, which includes Ireland, declined by 8%.

Economic Benefits

In 2009, out-of-state tourist expenditure, including spending by visitors from Northern Ireland, amounted to €3.4 billion. With a further €0.5 billion spent by overseas visitors on fares to Irish carriers, total foreign exchange earnings were €3.9 billion. Domestic tourism expenditure amounted to €1.4 billion making tourism in total a €5.3 billion industry in 2009.

Government earned estimated revenue of €1.3 billion through taxation of tourism, of which €0.9 billion came from foreign tourism. In 2009 the tourism industry accounted for 3.7% of tax revenue.

In 2009 the value of exported goods and services was estimated at €148.4 billion of which €3.9 billion can be directly attributed to tourism, accounting for 2.6% 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 €5.3 billion in 2009 represented some 3.8% of GNP in revenue terms. In terms of gross value added (GVA) – a measure of the contribution to the economy of a sector - tourism generated €3.6 billion in added value or 2.5% of total GVA. In income terms, total tourism spend made up €4.3 billion (2.7%) of GDP 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 123,300 in 2009 (6.4% 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 190,000. This estimate includes an additional category of tourism services and attractions which is not covered by the CSO.

Tourism Numbers 2005 – 2009

Where did Ireland's tourists come from?

Numbers (000s)	2005	2006	2007	2008	2009
Britain	3,640	3,821	3,776	3,579	3,031
Mainland Europe	1,903	2,252	2,577	2,561	2,327
Germany	402	417	436	456	408
France	310	360	394	412	390
Italy	190	248	265	232	276
Netherlands	157	155	155	151	134
Belgium	84	95	82	85	93
Denmark	38	42	54	57	45
Sweden	59	74	96	80	59
Spain	171	198	249	243	256
Poland	125	230	308	287	223
Czech Republic	35	41	43	45	35
Austria	38	51	40	51	45
Switzerland	54	52	59	58	58
Other Europe	240	289	396	404	305
North America	937	1,034	1,071	953	892
USA	854	945	975	849	809
Canada	83	89	96	103	82
Rest of World	284	310	316	343	306
Australia	111	115	122	134	113
New Zealand	26	24	25	23	19
Japan	19	19	16	14	11
Other Asia	71	79	86	85	90
Africa	39	48	39	54	43
South/Central America	19	24	28	33	30
Total Overseas	6,763	7,417	7,739	7,436	6,555
Northern Ireland	613	626	638	636	664
Total Out-of-State	7,376	8,043	8,377	8,072	7,219
Domestic Trips	7,173	7,310	7,942	8,339	8,340

Note: Annual estimates for smaller markets are subject to lower levels of statistical confidence.

Source: CSO/Fáilte Ireland/NITB

Tourism Revenue 2005 – 2009

How much money did they spend?

Revenue (€m)	2005	2006	2007	2008	2009
Britain	1,274.2	1,372.4	1,387.3	1,348.5	1,034.6
Mainland Europe	1,238.6	1,354.5	1,404.7	1,517.0	1,179.7
Germany	237.7	244.6	234.5	287.8	185.0
France	176.3	199.1	200.3	253.4	207.6
Italy	124.3	149.4	168.9	157.1	157.7
Netherlands	80.4	70.8	71.6	68.3	61.3
Other Europe	619.9	690.6	729.4	750.4	568.1
North America	738.2	815.1	823.3	667.7	621.1
Other Overseas	235.9	267.1	329.3	315.8	279.4
TOTAL OVERSEAS	3,486.9	3,809.0	3,944.6	3,849.0	3,114.8
Northern Ireland	178.8	189.8	202.8	210.5	209.9
TOTAL OUT-OF-STATE	3,665.7	3,998.8	4,147.4	4,059.5	3,324.7
Carrier Receipts	583.0	663.0	726.0	686.0	524.0
Overseas Same-day Visits	23.3	30.3	28.6	35.5	30.3
TOTAL FOREIGN EXCHANGE EARNINGS	4,272.0	4,692.0	4,902.0	4,781.0	3,879.0
Domestic Trips	1,164.5	1,375.2	1,551.0	1,546.0	1,389.8
TOTAL TOURISM REVENUE	5,436.5	6,067.2	6,453.0	6,327.0	5,268.8

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/NITB

Where did tourists go in 2009?

Numbers (000s) Revenue (€m)	Britain	Mainland Europe	North America	Other Areas	Overseas Tourists	Northern Ireland	Domestic Trips	Total
Dublin	1,464	1,588	615	214	3,882	163	1,431	5,476
	322.2	553.8	230.7	130.9	1,237.6	58.4	216.3	1,512.3
East & Midlands	361	260	94	44	759	106	947	1,812
	111.3	92.8	30.4	24.0	258.5	23.9	124.6	407.0
South-East	259	243	137	40	678	17	1,102	1,797
	85.2	95.7	30.5	15.0	226.4	9.1	176.0	411.5
South-West	550	573	306	88	1,517	21	1,798	3,336
	224.1	222.6	130.9	50.4	628.0	36.2	337.8	1,002.0
Shannon	246	278	212	54	791	21	918	1,730
	85.9	62.2	73.8	28.5	250.4	4.9	135.3	390.6
West	366	474	249	58	1,147	52	1,390	2,589
	143.0	107.3	102.4	21.5	374.2	13.2	285.2	672.6
North-West	169	145	65	23	403	254	754	1,411
	62.9	45.3	22.3	9.2	139.7	64.2	114.7	318.6
	1,034.6	1,179.7	621.1	279.4	3,114.8	209.9	1,389.8	4,714.5

Overseas Tourists 2009

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	28	23	31	29	28
Other Food & Drink	36	41	33	33	36
Sightseeing/ Entertainment	6	5	6	7	6
Internal transport	11	10	11	12	11
Shopping	16	17	16	15	16
Miscellaneous	3	5	2	3	3

When did they arrive?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
January-March	19	21	20	14	13
April	9	8	10	8	7
May	9	10	9	10	9
June	9	9	9	12	11
July	12	11	13	14	13
August	12	11	12	12	13
September	9	8	8	11	9
October-December	21	22	19	19	25

Source: CSO

How did they arrive/depart?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Air					
From Britain	42	75	7	23	59
From Main. Europe	36	1	86	17	32
Transatlantic	9	*	1	56	2
Sea					
From Britain	11	22	3	2	5
From Main. Europe	1	*	2	*	*
Via N. Ireland	2	2	2	2	2

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	12	16	9	16	6
Guesthouses/ B&Bs	6	4	5	7	5
Rented	30	13	37	32	29
Caravan & Camping	1	*	1	*	*
Hostels	3	1	4	5	4
Friends/ Relatives	33	58	24	26	39
Other	15	8	20	14	17
Source: SOT					
Nights (Mn)					
Source (CSO)	52.9	15.4	24.5	8.2	4.7

(* indicates less than 0.5 percent)

What activities did they engage in?

	Activity Important in Choice of Ireland			
	Overseas Participants (000s)	Spend in Ireland (€mn)	Overseas Holidaymakers (000s)	Spend in Ireland (€mn)
Hiking/Cross Country Walking	830	494	366	215
Golf	143	110	74	59
Angling	132	105	60	43
Cycling	114	97	42	29
Equestrian	46	27	16	11

What was their main reason for visiting Ireland?

(000s)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	2,931	1,118	1,115	555	143
Visit Friends/ Relatives	2,289	1,325	630	230	105
Business	873	483	282	74	33
Other	462	105	300	33	25

Source: CSO and NITB

Overseas Holidaymakers 2009

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 2009?

Holidaymakers (000s)	2004	2005	2006	2007	2008	2009
Britain	1,718	1,662	1,765	1,778	1,596	1,118
Mainland Europe	825	950	1,114	1,378	1,216	1,115
North America	656	614	670	687	614	555
Rest of World	167	139	163	150	164	143
Total	3,367	3,365	3,711	3,993	3,592	2,931

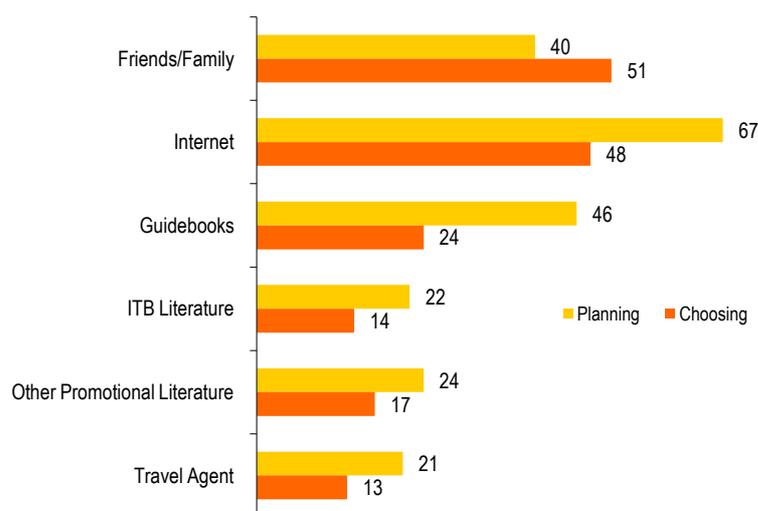
Source: CSO and NITB

Type of Holidays Taken in Ireland (000s) in 2009¹

Holidaymakers (000s)	Total	Britain	Mainland Europe	North America	Rest of World
Hired Car - Paid Acc	502	89	223	148	43
Touring - Paid Acc	293	114	104	64	12
Dublin Break	764	426	230	83	25
Youth Budget	300	68	142	63	27

Source: Fáilte Ireland SOT

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



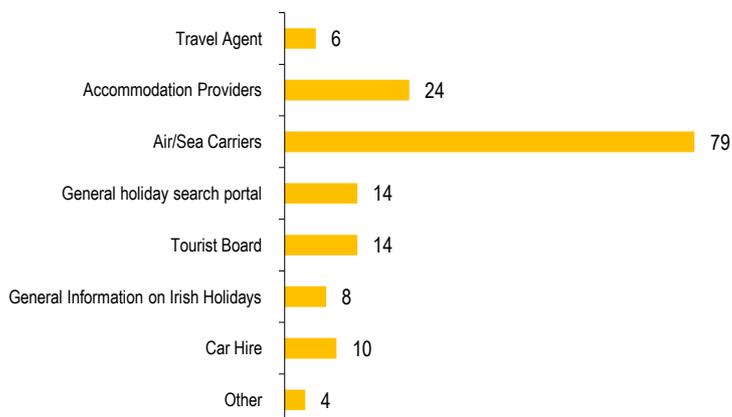
Source: Fáilte Ireland's Visitor Attitudes Survey

¹ Paid accommodation refers to hotels, guesthouses, B&B.....

How do overseas holidaymakers to Ireland use the internet?

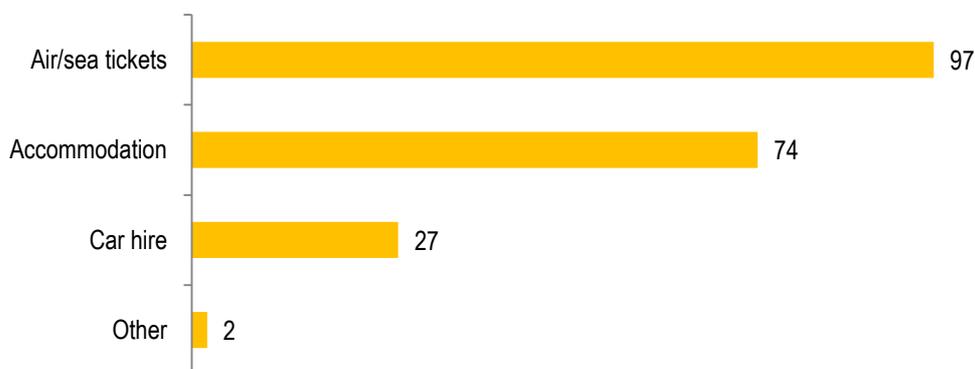
84% of overseas holidaymakers to Ireland use the internet to book or purchase some element of their holiday to Ireland. The charts below show how they used the internet in 2009.

Websites visited (%) 2009



Source: Fáilte Ireland's Survey of Overseas Travellers

Booked/purchased used over internet (%) 2009



Source: Fáilte Ireland's Survey of Overseas Travellers

How did they arrange their holiday?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Package*	16	8	16	27	16
Independent	84	92	84	73	84

* Prepaid an inclusive price for fares to/from Ireland and at least one other element of the holiday.

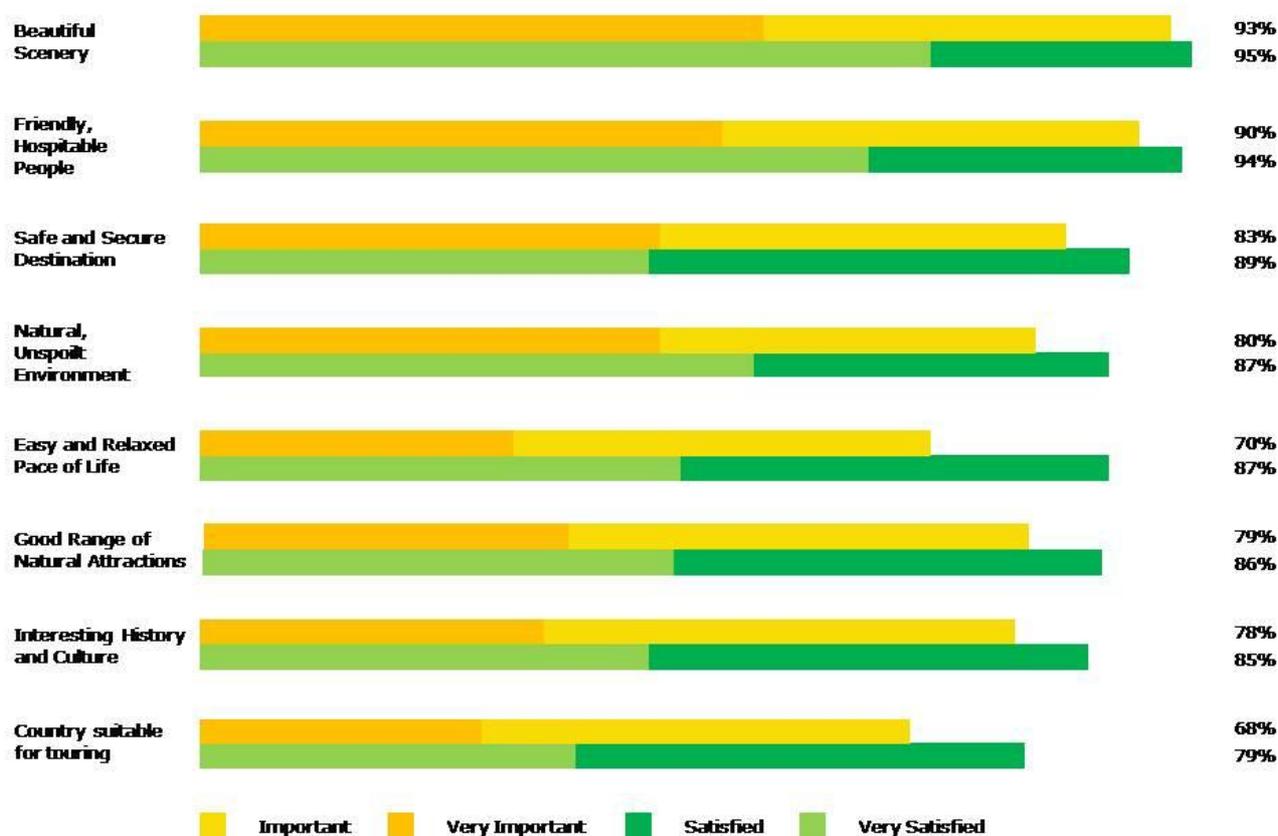
Source: Fáilte Ireland's Survey of Overseas Travellers

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

Experience of Ireland		Use of Car		Age		Social Class		Party Composition	
First Visit	59	Car Brought	8	Under 25 yrs	23	Managerial/Professional (AB)	20	Alone	24
Repeat	37	Car Hired	30	25-34 yrs	22	White Collar (C1)	63	Couple	40
				35-44 yrs	14	Skilled Worker (C2)	13	Family	16
Irish-born	4	Car Not Used	63	45+ yrs	40	Unskilled Worker (DE)	3	Other Adult Group	20

Source: Fáilte Ireland's Survey of Overseas Travellers

Importance and Rating of Destination Issues



Source: Fáilte Ireland's Visitor Attitudes Survey

Important Note: Due to a change in methodology, 2009 results are not directly comparable to those published in previous years.

Domestic Tourism 2009

Domestic Trips (000s) by Purpose of Travel

	2005	2006	2007	2008	2009
Holiday Trips	3,348	3,827	4,271	4,398	4,037
- Long (4+ nights)	1,137	1,089	1,286	1,150	1,104
- Short (1-3 nights)	2,212	2,738	2,984	3,248	2,933
VFR Trips	2,298	2,254	2,420	2,656	2,712
Business Trips	770	761	711	658	600
Other Trips	757	468	541	627	990
Total Trips	7,173	7,310	7,942	8,339	8,340

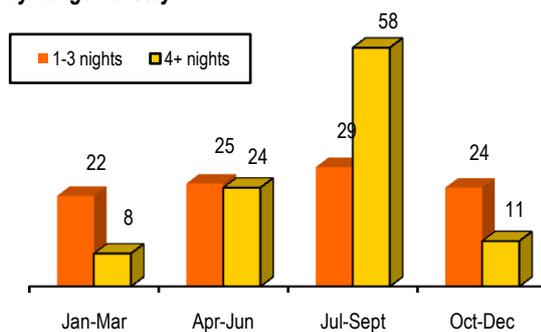
Domestic Expenditure (€m) by Purpose of Travel

	2005	2006	2007	2008	2009
Holiday	706.8	872.7	1,028.1	1,027.9	843.3
- Long (4+ nights)	344.6	376.4	473.4	428.6	372.5
- Short (1-3 nights)	362.2	496.3	554.7	599.3	470.8
VFR Trips	142.4	181.8	219.7	215.7	171.1
Business Trips	188.3	227.3	194.1	162.8	136.2
Other Trips	127.0	93.4	109.1	139.6	239.2
Total Expenditure	1,164.5	1,375.2	1,551.0	1,546.0	1,389.8

Accommodation Bednights Domestic Holidaymakers (%)

	2005	2006	2007	2008	2009
Hotels	31	32	33	35	36
Guesthouse/B&Bs	7	6	5	4	3
Caravan/Camping	10	11	12	12	10
Rented	22	19	19	17	18
Holiday Home	14	15	16	18	20
Friends/Relatives	11	14	11	11	13
Other	4	3	4	3	2

Seasonality of Holidaymakers (%) 2009 by Length of Stay



Activities Engaged In by Domestic Holidaymakers (%)

	2009
Watersports	27
Houses/ Castles	24
National Parks	23
Visits to Spas	23
Heritage/ Interpretive Centres	21
Hiking/Walking	21
Gardens	20
Museums/Art Galleries	14
Golf	10
Angling	6
Cycling	6
Equestrian Pursuits	3

The Tourism Product

Accommodation in 2009

	Premises	Rooms
Hotels	915	60,148
Guesthouses	336	4,050
Farmhouses and Town & Country Homes*	2,465	10,299
Self-Catering (Group Scheme only - Units)	4,617	
Hostels (beds)	133	8,240
Caravan & Camping (pitches)	100	5,835

Source TAMS, TAA.

* includes specialist and pub accommodation

Accommodation occupancy in 2009

	%
Hotel Room Occupancy	55
Guesthouse Room Occupancy	44
B&Bs Room Occupancy	31
Hostels Bed Occupancy	46
Group Scheme Self-Catering Unit Occupancy	33

Source: Fáilte Ireland Occupancy Surveys

Attendances at popular visitor attractions in Ireland 2009

Fee-charging Attractions			Free Attractions		
Name of Attraction	County	2009	Name of Attraction	County	2009
Guinness Storehouse	Dublin	1,019,166	The National Gallery of Ireland	Dublin	782,469
Dublin Zoo	Dublin	898,469	National Botanic Gardens	Dublin	612,000
Cliffs of Moher Visitor Experience	Clare	763,758	Irish Museum of Modern Art	Dublin	418,000
National Aquatic Centre	Dublin	723,974	National Museum of Ireland - Archaeology	Dublin	370,965
Book of Kells	Dublin	478,304	National Museum of Ireland - Decorative Arts & History	Dublin	319,791
Fota Wildlife Park	Cork	347,231	Holy Cross Abbey	Tipperary	250,000
St Patrick's Cathedral	Dublin	331,136	Farmleigh	Dublin	245,937
Blarney Castle	Cork	320,000	Chester Beatty Library	Dublin	207,250
Kilmainham Gaol	Dublin	285,974	Dublin City Gallery – The Hugh Lane	Dublin	164,274
Bunratty Castle & Folk Park	Clare	273,140	The National Library of Ireland	Dublin	140,000

Source: Fáilte Ireland Visitor Attractions Survey

All estimates are based on information from the CSO's Country of Residence Survey (CRS), 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/