

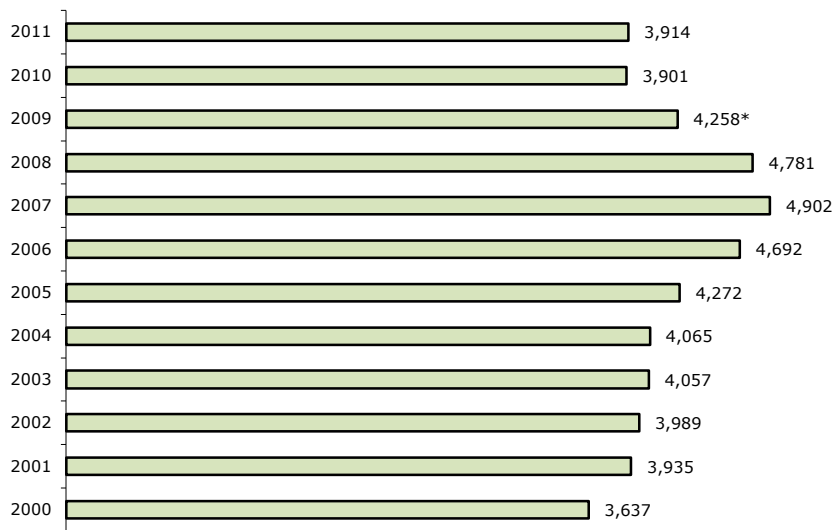
TOURISM FACTS 2011

December 2012

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Expenditure by visitors to Ireland (including receipts paid to Irish carriers by foreign visitors) was estimated to be worth €3.9 billion in 2011, this represents marginal growth (less than 1%) on 2010.

Total Foreign Exchange Earnings €mn 2000-2011



*Slight discontinuity with previous years

Overseas tourist visits to Ireland in 2011 grew by 6% to 6.3 million. Tourist numbers from Mainland Europe grew by 11%, North America rose by 6%, and Britain increased by 3%. While the performance of overseas markets improved, the recovery was not sufficient to regain ground lost in 2010.

The growth of 6% in tourist arrivals to Ireland is slightly ahead of growth of 5% in world arrivals as reported by the World Tourism Organisation. International tourist arrivals in Europe and also in Northern Europe (which includes Ireland) rose by 6% in 2011 when compared to 2010.

Economic Benefits

In 2011, out-of-state tourist expenditure, including spending by visitors from Northern Ireland, amounted to €3.2 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 €1.8 billion making tourism in total a €5.7 billion industry in 2011.

Government earned estimated revenue of €1.4 billion through taxation of tourism, of which €0.9 billion came from foreign tourism. In 2011 the tourism industry accounted for 4.1% of tax revenue.

In 2011 the value of exported goods and services was estimated at €166.8 billion of which €3.9 billion can be directly attributed to tourism, accounting for 2.3% 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 €5.7 billion in 2011 represented some 4.5% 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 121,100 in 2011 (6.3% 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 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.

Employment – Some useful figures

Every 60 international tourists help support one tourism job
1,000 additional tourists support 17 Irish jobs.

Tourism Numbers 2008 – 2011

Where did Ireland's tourists come from?

Numbers (000s)	2008	2009 ¹	2010	2011
Britain	3,579	3,034	2,759	2,825
Mainland Europe	2,561	2,323	2,011	2,231
Germany	456	411	381	420
France	412	393	344	400
Italy	232	274	214	213
Spain	243	255	214	237
Belgium/Netherlands, Luxembourg	<i>n/a</i>	<i>n/a</i>	195	229
Norway, Sweden, Finland & Denmark	217	167	159	175
Other Europe	1,001	823	503	557
North America	953	920	864	917
USA	849	835	778	818
Canada	103	85	86	99
Rest of World	343	301	311	352
Australia, New Zealand, & Other Oceania	157	130	135	141
Other Areas	186	171	176	212
Total Overseas	7,436	6,578	5,945	6,326
Northern Ireland	636	985 ²	1,189	1,304
Total Out-of-State	8,072	7,563	7,134	7,630
Domestic Trips	8,339	8,340	8,614 ³	8,994

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

Tourism Performance – Some useful figures

Britain is our largest market, accounting for 45% of overseas tourists, followed by the rest of Europe at 35%. 15% of our overseas tourists come from North America.

¹ Revised March 2012

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 2008 – 2011

How much money did they spend?

Revenue (€m)	2008	2009 ⁴	2010	2011
Britain	1,348.5	1,035.8	879.44	873.65
Mainland Europe	1,517.0	1,348.0	1,133.9	1,134.3
Germany	<i>287.8</i>	<i>211.2</i>	<i>235.2</i>	<i>234.3</i>
France	<i>253.4</i>	<i>236.9</i>	<i>195.9</i>	<i>212.6</i>
Italy	<i>n.a.</i>	<i>n.a.</i>	<i>111.3</i>	<i>112.5</i>
Spain	<i>n.a.</i>	<i>n.a.</i>	<i>127.9</i>	<i>122.4</i>
Other Europe	<i>975.8</i>	<i>899.8</i>	<i>463.6</i>	<i>452.5</i>
North America	667.7	724.6	695.1	690.5
	<i>n.a.</i>	<i>n.a.</i>	<i>622.2</i>	<i>617.8</i>
	<i>n.a.</i>	<i>n.a.</i>	<i>72.9</i>	<i>72.7</i>
Other Overseas	315.8	311.3	290.4	272.2
TOTAL OVERSEAS	3,849.0	3,419.7	2,998.8	2,970.7
Northern Ireland	210.5	287.4 ⁵	297.3	271.9 ⁶
TOTAL OUT-OF-STATE	4,059.5	3,707.1	3,296.1	3,242.6
Carrier Receipts	686.0	524.0	580.0	626.0
Overseas Same-day Visits	35.5	27.0	25.0	45.0
TOTAL FOREIGN EXCHANGE EARNINGS	4,781.0	4,258.1	3,901.1	3,913.6
Domestic Trips	1,546.0	1,389.8	1,870.2 ⁷	1,822.2
TOTAL TOURISM REVENUE	6,327.0	5,647.9	5,771.3	5,735.8

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.

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

Revenue – Some useful figures

Per diems – spend per person per day

(based on 2009 data – last revised December 2011)

	€
Overseas visitors	€65
Overseas holidaymakers	€100
Domestic overnight trips	€60
Domestic day trips	€40

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

⁴ Revised March 2012

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

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⁷ Not comparable to previous years due to a change in methodology

Regional Visits and Revenue 2011

Where did tourists go in 2011?

Numbers (000s) Revenue (€m)	Britain	Mainland Europe	North America	Other Areas	Overseas Tourists	Northern Ireland	Domestic Trips	Total
Dublin	1,328	1,567	663	247	3,805	311	1,683	5,799
	256.0	504.9	220.6	143.7	1,125.2	76.1	314.6	1,515.9
East & Midlands	372	233	104	51	760	185	1,183	2,128
	117.2	81.9	32.7	21.3	253.1	38.0	198.5	489.6
South-East	238	269	174	39	720	73	1,293	2,086
	65.6	61.3	34.6	10.0	171.5	19.6	271.3	462.4
South-West	553	585	405	135	1,678	70	1,906	3,654
	201.2	183.3	144.9	66.5	595.9	19.6	442.7	1,058.2
Shannon	282	279	252	46	859	32	887	1,778
	80.7	71.5	96.5	8.1	256.8	8.1	169.1	434.0
West	249	528	320	83	1,180	103	1,303	2,586
	83.4	189.1	133.8	17.3	423.6	27.7	290.8	742.1
North-West	209	173	94	29	505	530	739	1,774
	69.7	42.3	27.4	5.3	144.7	80.7	135.2	3,60.6

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

Overseas Tourists in 2011

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	27	25	28	27	23
Other Food & Drink	35	41	32	34	34
Sightseeing/ Entertainment	7	6	8	8	8
Internal transport	11	11	12	11	11
Shopping	16	14	16	17	20
Miscellaneous	3	3	4	3	4

When did they arrive?

Seasonality (%)	Total	Britain	Mainland Europe	North America	Rest of World
January-March	18	19	18	16	18
April	9	9	9	8	8
May	9	9	10	10	9
June	10	8	10	13	11
July	12	11	12	13	13
August	12	12	13	12	11
September	9	9	9	10	10
October-December	21	23	20	18	21

Source: Fáilte Ireland estimates based on CSO

How did they arrive/depart?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Air					
From Britain	40	71	7	22	55
From Mainland Europe	35	1	86	16	33
Transatlantic	9	1	1	56	2
Sea					
From Britain	11	22	3	3	7
From Mainland Europe	1	*	3	*	*
Via N. Ireland	3	6	1	1	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	14	19	10	27	7
Guesthouses/ B&Bs	7	4	7	11	4
Rented	26	7	31	23	45
Caravan & Camping	1	*	1	-	-
Hostels	4	1	6	4	3
Friends/ Relatives	32	63	22	25	27
Other	16	6	23	10	14
Nights (Million)	51.9	14.9	23.2	8.9	5.0

Source: SOT

Source: CSO

(* indicates less than 0.5 percent)

What activities did they engage in?

	Overseas Participants (000s)
Hiking/Cross Country Walking	776
Golf	181
Angling	113
Cycling	178
Equestrian	72

What was their main reason for visiting Ireland?

(000s)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	2,818	966	1,078	604	170
Visit Friends/ Relatives	2,027	1,268	477	173	109
Business	959	486	341	85	47
Other	522	105	335	55	26

Source: CSO and NISRA

Overseas Holidaymakers 2011

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 2011?

Holidaymakers (000s)	2008	2009	2010	2011
Britain	1,596	953	896	966
Mainland Europe	1,216	1,090	971	1,078
North America	614	567	546	604
Rest of World	164	158	137	170
Total	3,592	2,769	2,549	2,818

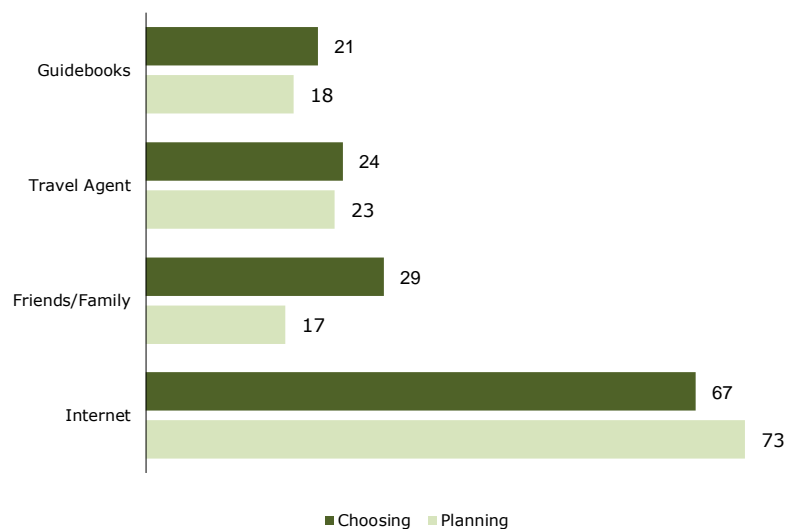
Source: CSO and NISRA

Type of Holidays Taken in Ireland (000s) in 2011⁸

Holidaymakers (000s)	Total	Britain	Mainland Europe	North America	Rest of World
Hired Car - Paid Accommodation	624	87	282	200	55
Touring - Paid Accommodation	387	125	132	108	23
Dublin Break	648	390	176	64	19
Youth Budget	306	55	139	68	45

Source: Fáilte Ireland SOT

Sources of Information for Choosing/Planning a Holiday in Ireland (%)⁹



Source: Fáilte Ireland's Post Survey of Holidaymakers

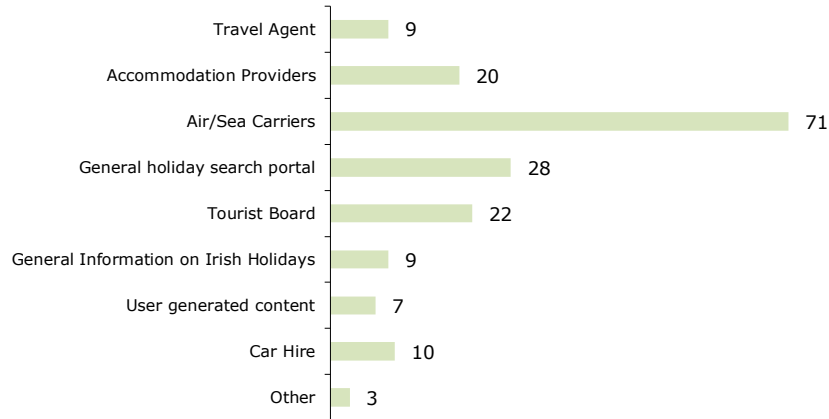
⁸ Paid accommodation refers to hotels, guesthouses, and B&Bs

⁹ A new survey of holidaymakers was implemented in 2011, previous years not comparable

How do overseas holidaymakers to Ireland use the internet?

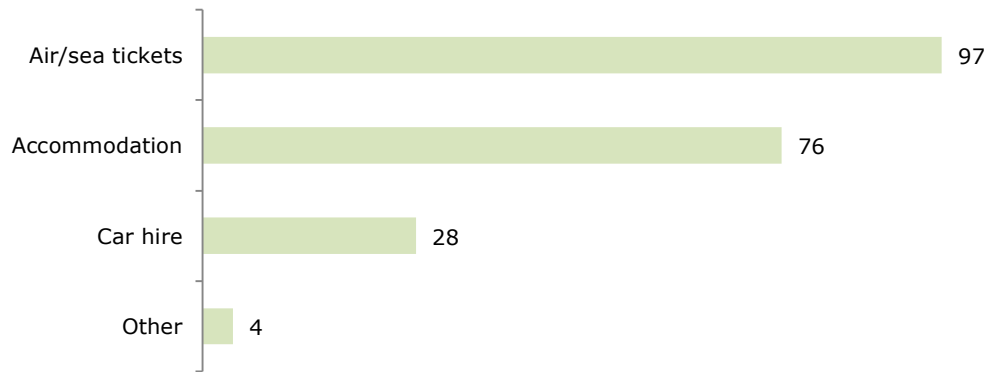
81% of overseas holidaymakers to Ireland use the internet to book or purchase some element of their holiday to Ireland. The charts below show how they used the internet in 2011.

Websites visited (%) 2011



Source: Fáilte Ireland's Survey of Overseas Travellers

Booked/purchased used over internet (%) 2011



Source: Fáilte Ireland's Survey of Overseas Travellers

How did they arrange their holiday?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Package*	19	6	17	34	18
Independent	81	94	83	66	82

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

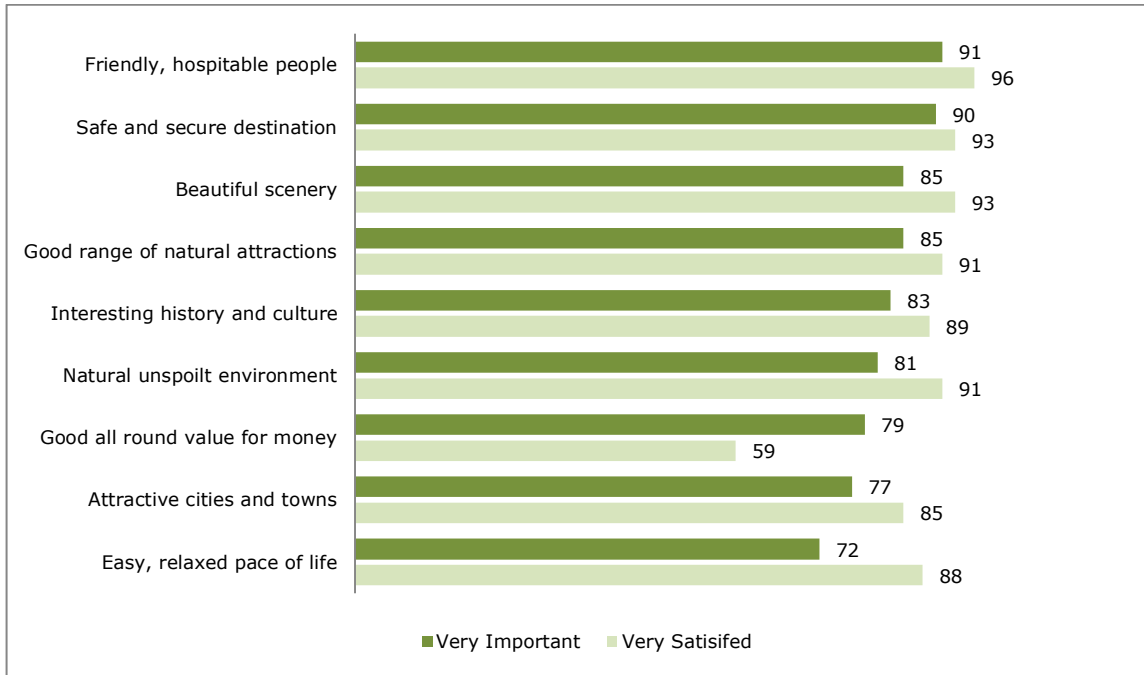
Source: Fáilte Ireland's Survey of Overseas Travellers

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	22	Managerial/Professional (AB)	31	Alone	23
Repeat	35	Car Hired	32	25-34 years	22	White Collar (C1)	53	Couple	41
Irish-born	3	Car Not Used	59	35-44 years	14	Skilled Worker (C2)	12	Family	14
				45+ years	42	Unskilled Worker (DE)	3	Other Adult Group	22

Source: Fáilte Ireland's Survey of Overseas Travellers

Importance and Rating of Destination Issues Among Overseas Holidaymakers (%)¹⁰



Source: Fáilte Ireland's Port Survey of Overseas Holidaymakers 2011

Domestic Tourism in 2011¹¹

Domestic Trips (000s) by Purpose of Travel

	2008	2009	2010	2011
Holiday Trips	4,398	4,037	4,604	4,436
- Long (4+ nights)	1,150	1,104	1,412	1,209
- Short (1-3 nights)	3,248	2,933	3,192	3,227
VFR Trips	2,656	2,712	2,410	3,038
Business Trips	658	600	485	465
Other Trips	627	990	1,116	1,055
Total Trips	8,339	8,340	8,615	8,994

Source: CSO Household Travel Surveys 2008-2011

Domestic Expenditure (€m) by Purpose of Travel

	2008	2009	2010	2011
Holiday	1,027.9	843.3	1,167.8	1,078.6
Long (4+ nights)	428.6	372.5	506.2	422.4
Short (1-3 nights)	599.3	470.8	661.2	656.1
VFR Trips	215.7	171.1	321.0	397.1
Business Trips	162.8	136.2	108.7	104.6
Other Trips	139.6	239.2	272.7	242.0
Total Expenditure	1,546.0	1,389.8	1,870.2	1,822.2

Source: CSO Household Travel Surveys 2008-2011

¹⁰ A new port survey of overseas holidaymakers was implemented in 2011.

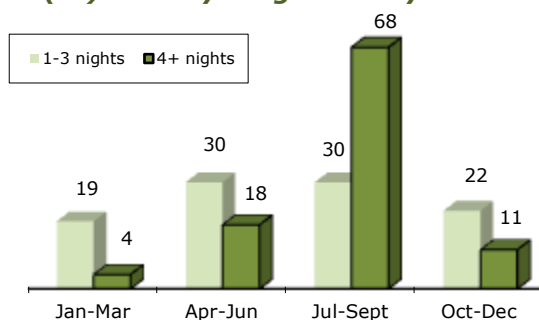
¹¹ 2010 – please note there is a discontinuity in domestic tourism figures between 2010 and previous years due to changes in methodology.

Accommodation Bednights Domestic Holidaymakers (%)

	2008	2009	2010	2011
Hotels	35	36	33	30
Guesthouse/B&Bs	4	3	2	3
Caravan/Camping	12	10	15	19
Rented	17	18	19	17
Holiday Home	18	20	20	22
Friends/Relatives	11	13	10	6
Other	3	2	1	2

Source: CSO Household Travel Surveys 2008-2011

Seasonality of Holidaymakers (%) 2011 by Length of Stay



Source: CSO Household Travel Survey 2011

Activities Engaged In by Domestic Holidaymakers (%)

National Parks	23
Houses/ Castles	21
Hiking/Walking	21
Watersports	20
Visits to Spas	18
Gardens	17
Heritage/ Interpretive Centres	14
Museums/Art Galleries	13
Golf	9
Cycling	6
Angling	5
Attending Horse racing	5
Equestrian Pursuits	2

Source: Fáilte Ireland Domestic Omnibus 2011

The Tourism Product

Accommodation in 2011

	Premises	Rooms
Hotels	883	59,377
Guesthouses	281	3,397
Farmhouses and Town & Country Homes*	1,907	8,059
Self-Catering (Group Scheme only - Units)	3,819	
Hostels (beds)	129	8,068
Caravan & Camping (pitches)	94	5,909

Source TAMS, TAA.

* includes specialist and pub accommodation

Accommodation occupancy in 2011

	%
Hotel Room Occupancy	56
Guesthouse Room Occupancy	46
B&Bs Room Occupancy	31
Hostels Bed Occupancy	47
Group Scheme Self-Catering Unit Occupancy	39

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
Guinness Storehouse	Dublin	1,025,677	The National Gallery of Ireland	Dublin	624,412
Dublin Zoo	Dublin	1,000,000	National Botanic Gardens	Dublin	501,000
National Aquatic Centre	Dublin	825,049	National Museum of Ireland - Archaeology	Dublin	402,582
Cliffs of Moher Visitor Experience	Clare	809,474	Irish Museum of Modern Art	Dublin	362,000
Book of Kells	Dublin	524,119	Farmleigh	Dublin	315,464
Fota Wildlife Park	Cork	390,124	National Museum of Ireland - Decorative Arts & History	Dublin	295,488
St Patrick's Cathedral	Dublin	362,000	National Museum of Ireland - Natural History	Dublin	289,172
Blarney Castle	Cork	325,000	Chester Beatty Library	Dublin	247,729
Kilmainham Gaol	Dublin	294,095	Science Gallery	Dublin	242,833
Bunratty Castle & Folk Park	Clare	275,986	Holy Cross Abbey	Tipperary	240,000

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) Survey 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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