

TOURISM FACTS 2012

October 2013

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Expenditure by tourists visiting Ireland (including receipts paid to Irish carriers by foreign visitors) was estimated to be worth €4 billion in 2012, this represents growth of 4.4% on 2011. Combining spending by international tourists with the money spent by Irish residents taking trips here, total tourism expenditure in 2012 was estimated to be €5.4 billion.

Overseas tourist visits to Ireland in 2012 grew modestly by 1% to 6.3 million. However, the mix by country of origin changed with a 2.8% drop in tourists from Britain being compensated for by 2.9% growth in visitors from Mainland Europe and 4.0% growth in those from North America. The number of tourists from other regions was up 7.1% last year.

Britain remains our biggest source market for overseas tourists, representing 44% of all such visits. The next biggest source market is Mainland Europe, which accounts for 36% of international volume. Some 15% of overseas tourists come from North America.

Economic benefits

In 2012, out-of-state tourist expenditure, including spending by visitors from Northern Ireland, amounted to €3.2 billion. With a further €0.8 billion spent by overseas visitors on fares to Irish carriers, total foreign exchange earnings were €4 billion. Domestic tourism expenditure amounted to €1.3 billion making tourism in total a €5.4 billion industry in 2012.

Government earned estimated revenue of €1.3 billion through taxation of tourism, of which €1 billion came from foreign tourism. In 2012 the tourism industry accounted for 3.8% of all tax revenue.

In 2012 the value of exported goods and services was estimated at €176.7 billion of which €4 billion can be directly attributed to tourism, accounting for 2.3% 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 €5.4 billion in 2012 represented 4.1% of GNP in revenue terms. In income terms, total tourism spend made up €4.4 billion, 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 123,100 in 2012 (6.7% 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 185,000. 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 63 international tourists help support one tourism job.

1,000 additional tourists support 15 jobs in the tourism industry.

Tourism Numbers 2009 – 2012

Where did Ireland's tourists come from?

Numbers (000s)	2009 ¹	2010	2011 ²	2012
Britain	3,034	2,759	2,799	2,722
Mainland Europe	2,323	2,011	2,184	2,247
Germany	<i>411</i>	<i>381</i>	<i>411</i>	<i>437</i>
France	<i>393</i>	<i>344</i>	<i>381</i>	<i>384</i>
Italy	<i>274</i>	<i>214</i>	<i>214</i>	<i>240</i>
Spain	<i>255</i>	<i>214</i>	<i>233</i>	<i>239</i>
Belgium, Netherlands, Luxembourg	<i>n/a</i>	<i>195</i>	<i>225</i>	<i>226</i>
Norway, Sweden, Finland & Denmark	<i>167</i>	<i>159</i>	<i>172</i>	<i>180</i>
Other Europe	<i>823</i>	<i>503</i>	<i>548</i>	<i>540</i>
North America	920	864	904	940
USA	<i>835</i>	<i>778</i>	<i>811</i>	<i>833</i>
Canada	<i>85</i>	<i>86</i>	<i>93</i>	<i>107</i>
Rest of World	301	311	353	378
Australia, New Zealand & Other Oceania	<i>130</i>	<i>135</i>	<i>143</i>	<i>158</i>
Other Areas	<i>171</i>	<i>176</i>	<i>210</i>	<i>219</i>
Total Overseas	6,578	5,945	6,240	6,286
Northern Ireland	<i>n/a</i>	<i>n/a</i>	<i>1,416</i>	<i>1,264</i>
Total out-of-state	n/a	n/a	7,656	7,550
Domestic trips ³	<i>8,340</i>	<i>7,300</i>	<i>7,169</i>	<i>7,031</i>

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 by CSO in 2013

³ 2010 and 2011 revised by CSO in 2013

Tourism Revenue 2009 – 2012

How much money did they spend?

Revenue (€m)	2009 ⁴	2010	2011 ⁵	2012
Britain	1,035.8	879.4	858.3	857.9
Mainland Europe	1,348.0	1,133.9	1,110.8	1,060.5
Germany	<i>211.2</i>	<i>235.2</i>	<i>236.6</i>	<i>223.5</i>
France	<i>236.9</i>	<i>195.9</i>	<i>195.3</i>	<i>188.8</i>
Italy	<i>n.a.</i>	<i>111.3</i>	<i>101.3</i>	<i>107.2</i>
Other Europe	<i>899.8</i>	<i>591.8</i>	<i>576.9</i>	<i>541.0</i>
North America	724.6	695.1	677.4	745.7
USA	<i>n.a.</i>	<i>622.2</i>	<i>606.2</i>	<i>647.9</i>
Canada	<i>n.a.</i>	<i>72.9</i>	<i>71.4</i>	<i>97.9</i>
Other Overseas	311.3	290.4	272.8	291.6
TOTAL OVERSEAS	3,419.7	2,998.8	2,919.4	2,955.8
Northern Ireland ⁶	n/a	n/a	295.8	284.3
TOTAL OUT-OF-STATE	n/a	n/a	3,215.2	3,240.1
Carrier receipts	524.0	580.0	626.0	767.0
Overseas same-day visits	27.0	25.0	36.0	34.0
TOTAL FOREIGN EXCHANGE EARNINGS⁷	n/a	n/a	3,877.2	4,041.1
Domestic trips ⁸	1,389.8	1,560.5	1,415.9	1,345.4
TOTAL TOURISM REVENUE	5,360.5	5,164.3	5,293.1	5,386.5

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

Overseas visitors ⁹	€61
Overseas holidaymakers	€77
Domestic overnight trips ¹⁰	€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 Revised by CSO in 2013

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

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

8 2010 and 2011 revised by CSO in 2013

9 Based on 2012 data

10 Based on 2009 data – last revised December 2011

Regional Visits and Revenue 2012

Where did tourists go in 2012?

Numbers (000s) Revenue (€m)	Britain	Mainland Europe	North America	Other Areas	Overseas Tourists	Northern Ireland ¹¹	Domestic Trips	Total
Dublin	1,090	1,582	687	282	3,641	418	1,392	5,451
	252.8	546.9	291.5	175.9	1,267.1	103.8	245.8	1,616.7
East & Midlands	335	212	97	44	688	91	918	1,697
	102.3	66.0	29.6	22.7	220.6	23.7	145.6	389.9
South-East	337	219	176	60	792	59	991	1,842
	98.4	66.9	39.0	27.8	232.1	5.9	180.0	418.0
South-West	645	628	402	104	1,779	49	1,403	3,231
	175.4	194.7	166.8	25.9	562.8	21.5	311.6	895.9
Shannon	331	254	235	47	867	8	673	1,548
	80.2	54.8	71.8	14.6	221.4	2.3	121.3	345.0
West	281	486	303	94	1,164	82	1,084	2,330
	87.6	105.2	124.6	21.6	339.0	29.5	235.2	603.7
North-West	205	117	81	25	428	557	570	1,555
	61.1	26.0	222.4	3.1	112.6	97.6	105.9	316.1

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

Overseas Tourists in 2012

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	26	22	29	27	24
Other food & drink	35	41	33	33	38
Sightseeing/entertainment	7	6	7	8	7
Internal transport	11	11	12	11	9
Shopping	15	15	15	15	18
Miscellaneous	5	4	4	6	5

When did they arrive?

Seasonality (%)	Total	Britain	Mainland Europe	North America	Rest of World
January-March	18	20	17	14	17
April	9	9	10	7	8
May	9	8	10	11	8
June	10	9	9	12	11
July	11	9	12	11	12
August	12	12	12	12	11
September	9	9	9	12	10
October-December	22	23	22	20	22

Source: Fáilte Ireland estimates based on CSO

¹¹ Source: NISRA GBP; Euro exchange rates 2012 - 0.81087 Source: Central Bank of Ireland

How did they arrive/depart?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Air					
From Britain	39	72	5	21	56
From Mainland Europe	36	1	86	16	30
Transatlantic	10	1	2	56	2
Sea					
From Britain	11	19	4	4	9
From Mainland Europe	1	*	3	-	*
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	18	24	14	32	9
Guesthouses/B&Bs	8	5	8	12	3
Self-catering	28	8	37	23	32
Caravan & camping	1	1	1	*	*
Hostels	4	1	5	4	6
Friends/relatives	28	56	17	22	36
Other	13	5	18	7	14

Source: SOT

Nights (Million)

48.8 13.8 21.3 8.8 4.9

Source (CSO)

(* indicates less than 0.5 percent)

What activities did they engage in?

	Overseas Participants (000s)
Hiking/cross country walking	578
Golf	171
Angling	118
Cycling	149
Equestrian	66

What was their main reason for visiting Ireland?

(000s)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	2,879	941	1,120	634	184
Visit friends/relatives	1,874	1,193	420	151	110
Business	1,036	524	351	98	63
Other	498	64	356	57	21

Source: CSO and NISRA

Just over a third (36%) of those coming to Ireland to visit friends/relatives were born in Ireland and a further 7% have other family ties to Ireland.

Overseas Holidaymakers 2012

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 2012?

Holidaymakers (000s)	2009	2010	2011	2012
Britain	953	896	961	941
Mainland Europe	1,090	971	1,041	1,120
North America	567	546	591	634
Rest of World	158	137	167	184
Total	2,769	2,549	2,760	2,879

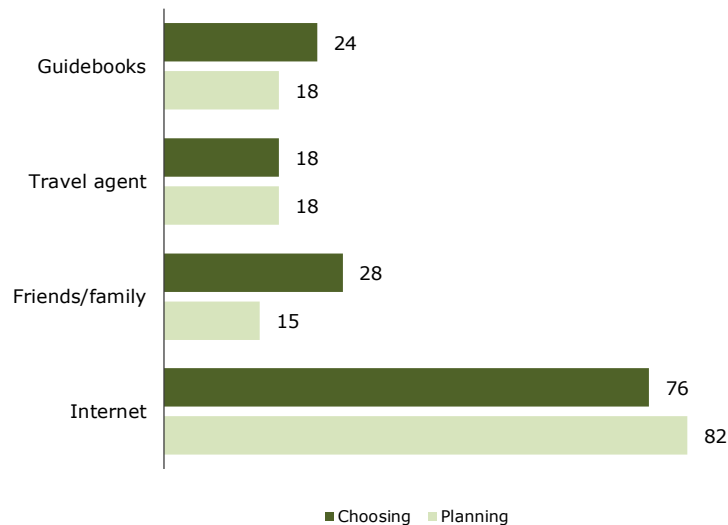
Source: CSO and NISRA

Type of holidays taken in Ireland(000s) in 2012¹²

Holidaymakers (000s)	Total	Britain	Mainland Europe	North America	Rest of World
Hired car - paid accommodation	632	152	211	216	53
Touring - paid accommodation	391	118	127	122	24
Dublin break	654	167	358	86	43
Youth budget	319	51	166	64	38

Source: Fáilte Ireland SOT

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



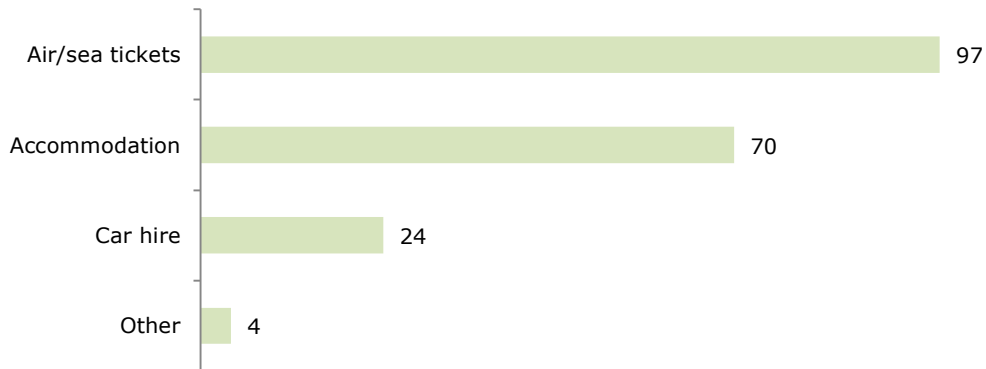
Source: Fáilte Ireland's Post Survey of Holidaymakers 2012

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

How do overseas holidaymakers to Ireland use the internet?

82% of overseas holidaymakers to Ireland use the internet to book or purchase some element of their holiday to Ireland.

Booked/purchased used over internet (%) 2012



Source: Fáilte Ireland's Survey of Overseas Travellers

How did they arrange their holiday?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Package*	17	6	17	29	7
Independent	83	94	83	71	93

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

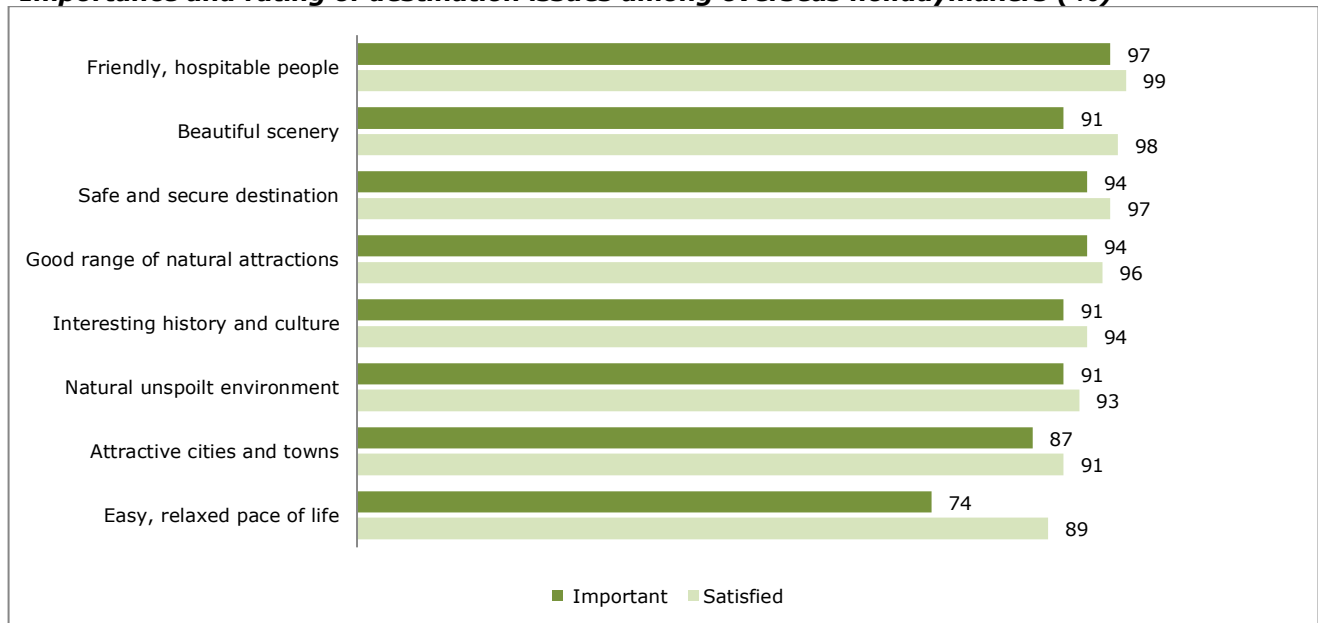
Source: Fáilte Ireland's Survey of Overseas Travellers

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

Experience of Ireland	Use of car	Age	Social class	Party composition	
First visit	60	Car brought 12	Under 25 years 21	Managerial/professional (AB) 31	Alone 26
Repeat	36	Car hired 31	25-34 years 23	White collar (C1) 53	Couple 40
Irish-born	4	Car not used 58	35-44 years 16	Skilled worker (C2) 13	Family 14
			45+ years 40	Unskilled worker (DE) 2	Other adult group 21

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 2012

Domestic Tourism in 2012¹³

Domestic trips (000s) by purpose of travel

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

Source: CSO Household Travel Surveys 2009-2012

Domestic expenditure (€m) by purpose of travel

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

Source: CSO Household Travel Surveys 2009-2012

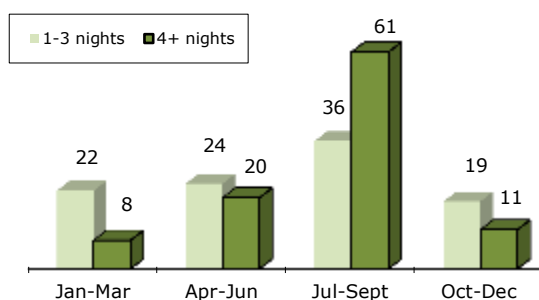
¹³ 2010 – please note there is a discontinuity in domestic tourism figures between 2010 and previous years due to changes in methodology. Also 2010 and 2011 have been revised in July 2013.

Accommodation bednights domestic holidaymakers (%)

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

Source: CSO Household Travel Surveys 2009-2012

Seasonality of holidaymakers (%) 2012 by length of stay



Source: CSO Household Travel Survey 2012

Activities engaged in by domestic holidaymakers (%)

National parks	23
Houses/castles	22
Hiking/walking	22
Watersports	22
Visits to spas	20
Heritage/ interpretive centres	18
Gardens	17
Museums/art galleries	14
Golf	9
Cycling	9
Angling	5
Attending horse racing	5
Equestrian pursuits	3

Source: Fáilte Ireland Domestic Omnibus 2012

The Tourism Product

Accommodation in 2012

	Premises	Rooms
Hotels	856	57,859
Guesthouses	264	3,243
Farmhouses and town & country homes*	1,825	7,767
Self-Catering (group scheme only - units)	3,624	
Hostels (beds)	126	8,058
Caravan & camping (pitches)	93	5,509

Source TAMS, TAA.

* includes specialist and pub accommodation

Accommodation occupancy in 2012

	%
Hotel Room Occupancy	60
Guesthouse Room Occupancy	50
B&Bs Room Occupancy	30
Hostels Bed Occupancy	46
Group Scheme Self-Catering Unit Occupancy	38

Source: Fáilte Ireland Occupancy Surveys

Attendances at popular visitor attractions in Ireland 2012

Fee-charging attractions			Free attractions		
Name of attraction	County	2012	Name of attraction	County	2012
Guinness Storehouse	Dublin	1,087,209	The National Gallery of Ireland	Dublin	660,486
Dublin Zoo	Dublin	1,029,417	National Botanic Gardens	Dublin	544,685
Cliffs of Moher Visitor Experience	Clare	873,988	National Museum of Ireland - Archaeology	Dublin	409,275
National Aquatic Centre	Dublin	813,406	Farmlough	Dublin	375,064
Book of Kells	Dublin	561,259	Science Gallery at Trinity College	Dublin	302,171
Tayto Park	Meath	391,000	National Museum of Ireland – Natural History	Dublin	290,927
St Patrick's Cathedral	Dublin	385,000	National Museum of Ireland - Decorative Arts & History	Dublin	271,309
Fota Wildlife Park	Cork	377,500	Chester Beatty Library	Dublin	255,704
Blarney Castle	Cork	329,000	Holy Cross Abbey	Tipperary	240,000
Kilmainham Gaol	Dublin	310,910	The National Library of Ireland	Dublin	180,320
Bunratty Castle & Folk Park	Clare	286,270	Connemara National Park	Galway	167,464

Source: Fáilte Ireland Visitor Attractions Survey 2012

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 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/