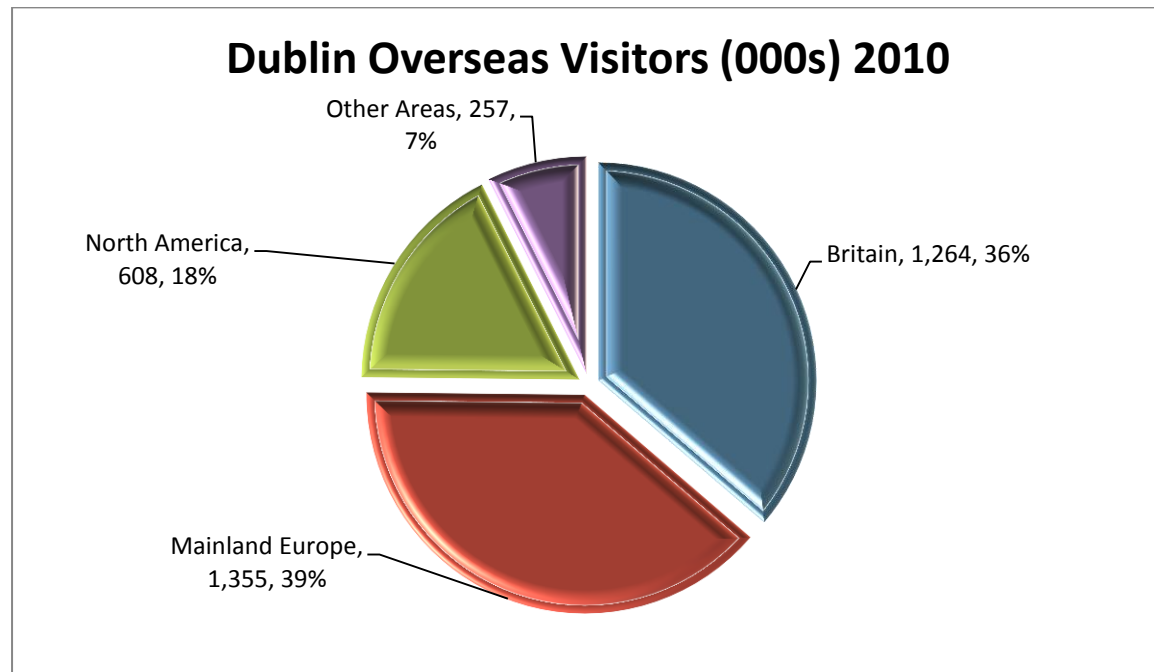


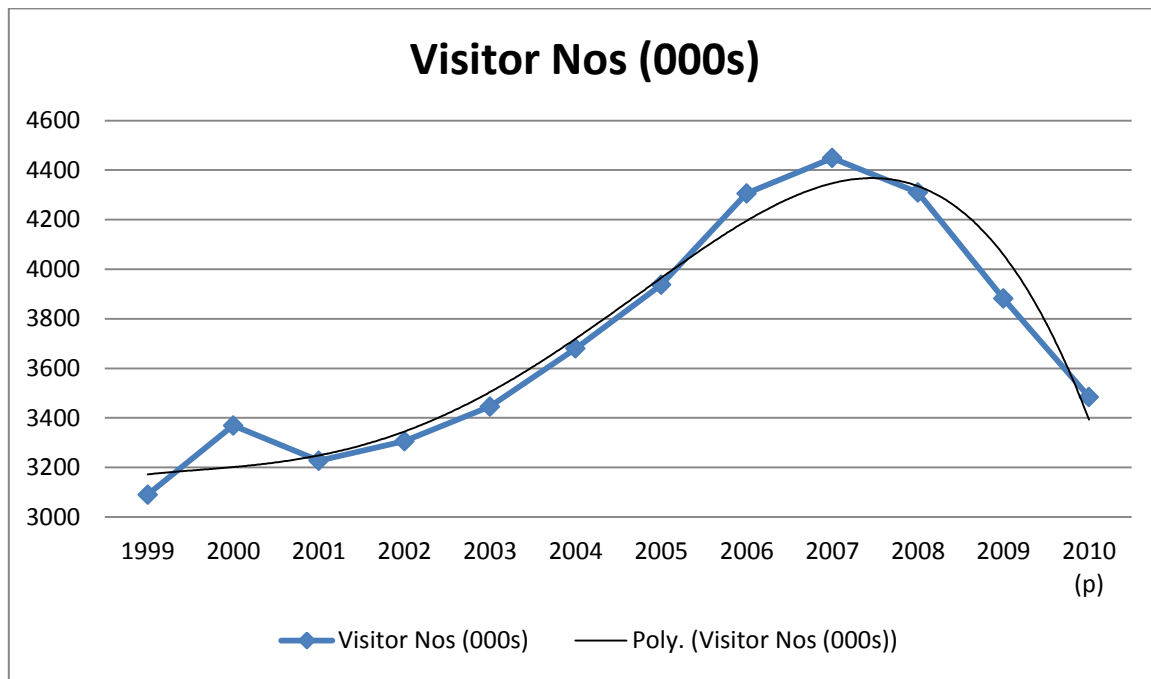
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Dublin attracted an estimated 3.5 million overseas tourists in 2010, almost half of whom were on holiday. Mainland Europe and Britain each accounted for more than a third of these visitors while more than half a million North Americans spent at least one night in the capital.



One in three euro spent in Ireland by overseas visitors were spent in Dublin. Mainland Europe accounted for a higher proportion of revenue (43%) than visits (39%).



While Dublin saw significant growth through the early years of the century, the number of overseas visitors, in particular, British visitors has sharply declined in recent years due to economic uncertainty and consequent changes in travel behaviour.

The British Market to Dublin

British Visitors

The British market is fairly evenly divided between holidaymakers, those travelling on business and visits to friends and family.

They tend to arrive by air and are well spread throughout the year. British visitors favour hotel accommodation, however almost half of all nights generated are spent in the homes of friends and/or relatives (one in five British visitors to Dublin is Irish-born). They are unlikely to travel beyond the capital.

Almost two thirds have been to Ireland before and a similar proportion travel alone. This corresponds to the relatively high proportion that are travelling either on business or to visit friends and family.

British Holidaymakers

Almost half of British holidaymakers travel to Dublin during the first and last quarters of the year and nine in ten arrive by air.

They tend to stay exclusively in Dublin - two in five say they are on a city break and almost two-thirds are on a *Dublin Break* (staying only in Dublin for a maximum of three nights). In keeping with this, few use a car and tend to get around the city on foot and on public transport. Hotels are their preferred form of accommodation. They are independent travellers and almost half are under 35 years of age.

The European Market to Dublin

Mainland European Visitors

More than half of European visitors to Dublin are on holiday and almost a quarter are visiting friends or family.

Air is the usual form of access to Dublin and more than half of European visitors arrive between May and September.

Hotels and the homes of family and friends are the preferred places to stay, however more than a quarter of nights are spent in rented accommodation, boosted by longer rentals for some coming for business or study.

They are less likely to travel outside of Dublin and tend to be on their first visit to Ireland.

More than half are under 35 years of age and they travel either on their own or as couples.



European Holidaymakers



The months of June to September attract almost three in five European holidaymakers and they tend to arrive in Dublin by air. More than half stay in hotels and one in five stay in hostels. Half describe their holiday as a city break and one in five are on a *Dublin Break* (staying only in Dublin for a maximum of three nights).

Less than a third use a car while in Ireland, preferring to walk or use public transport. As air travel is the preferred form of access, it follows that most of those who use a car hire one (26%).

The majority (66%) are white collar workers and more than half are under 35 years of age. While the majority (57%) described

themselves as single, the largest proportion (40%) are travelling as couples.

They are most likely to be on their first visit to Ireland and are independent travellers.

The North American Market to Dublin

North American Visitors

Two thirds of North American visitors to Dublin are on holiday and almost half come to Ireland between June and September. A further quarter were either on business or visiting family or friends.

Three in five arrive direct by air on transatlantic routes, with the remainder primarily arriving by air from Britain or Mainland Europe and a minority coming by sea. While two-thirds of North Americans use hotels, more than a quarter of North American bednights are spent in rented accommodation (primarily due to longer rentals for business or study purposes).

Unlike British or other European visitors, they tend to travel around the country with more than a third also spending at least one night in the South West.

Almost two thirds are on their first visit to Ireland while a significant 30% are repeat visitor and more than half travel alone. Around a quarter are managers or professionals and one in five is aged between 45 and 54 years.

North American Holidaymakers

Two-thirds arrive between May and September and most arrive by air, a slightly higher proportion (59%) arriving directly from North America and 40% travelling through Britain or Europe.

Almost three-quarters of North American holidaymakers (73%) stay in hotels which account for almost two-thirds of North American holiday nights. They have a strong tendency to explore the rest of the country with almost half visiting the South West. Two in five describe their holiday as a combination of a city and countryside holiday. Over one third hire a car during their holiday and one in five take a coach tour involving an overnight. Almost a third (31%) are on some form of package which is a relatively high proportion compared to our other markets.

Four out of five are in Ireland for the first time and almost half (45%) travel as couples.



| Number of Tourist Visits (000s) | 2006 | 2007 | 2008 | 2009 | 2010 (p) |
|------------------------------------|--------------|--------------|--------------|--------------|--------------|
| Britain | 1,864 | 1,743 | 1,689 | 1,464 | 1,264 |
| Mainland Europe | 1,483 | 1,711 | 1,680 | 1,588 | 1,355 |
| North America | 732 | 761 | 674 | 615 | 608 |
| Other Areas | 226 | 235 | 267 | 214 | 257 |
| Total Overseas Tourists | 4,306 | 4,449 | 4,310 | 3,882 | 3,484 |

Note: The above figures are **preliminary and will change** when final tourism estimates for 2010 are available from the Central Statistics Office. This will apply particularly in respect of Visitor Nights and Visitor Revenue. As a result, extreme caution must be used when interpreting the above figures. Due to changes in survey procedure in Northern Ireland in 2010, the estimate of overseas visitors travelling to the Republic of Ireland via Northern Ireland included in the above estimates are **not directly comparable to previous years**. This is particularly the case in respect of British visitors generally and visitors to the North West in particular.

| Tourism Revenue (€m) | 2006 | 2007 | 2008 | 2009 | 2010 (p) |
|-------------------------------|--------------|--------------|--------------|--------------|--------------|
| Britain | 396 | 372 | 388 | 322 | 253 |
| Mainland Europe | 537 | 584 | 640 | 554 | 448 |
| North America | 304 | 322 | 229 | 231 | 198 |
| Other Areas | 138 | 172 | 159 | 131 | 137 |
| Total Overseas Revenue | 1,374 | 1,450 | 1,415 | 1,238 | 1,040 |

| 2010 (p) | Visitors | | | Holidaymakers | |
|--------------------------------|---------------|------------------|------------------|---------------|------------------|
| Overseas Tourists | No. (000s) | Nights (000s) | Revenue (€mn) | No. (000s) | Nights (000s) |
| Britain | 1,264 | 4,357 | 253 | 441 | 1,259 |
| Mainland Europe | 1,355 | 9,533 | 448 | 685 | 2,773 |
| N. America | 608 | 2,975 | 198 | 409 | 1,469 |
| Other Areas | 257 | 3,007 | 137 | 129 | 1,072 |
| Total Overseas Tourists | 3,484 | 19,872 | 1,036 | 1,664 | 6,573 |

| Overseas Tourists (%) | No. | Nights | Revenue | No. | Nights |
|-----------------------|-----|--------|---------|-----|--------|
| Britain | 36% | 22% | 24% | 27% | 19% |
| Mainland Europe | 39% | 48% | 43% | 41% | 42% |
| N. America | 17% | 15% | 19% | 25% | 22% |
| Other Areas | 7% | 15% | 13% | 8% | 16% |

Overseas Visitors to Dublin

| Main Reason of Visit (%) | Total | Britain | M. Europe | N. America | Other Areas |
|-----------------------------|-------|---------|--------------|---------------|----------------|
| Holiday | 48 | 35 | 51 | 67 | 50 |
| Business | 21 | 30 | 18 | 11 | 14 |
| Visiting Friends/ Relatives | 26 | 32 | 24 | 16 | 27 |
| Other | 6 | 3 | 7 | 5 | 8 |

| Month of Arrival (%) | Total | Britain | M. Europe | N. America | Other Areas |
|----------------------|-------|---------|--------------|---------------|----------------|
| January-March | 19 | 24 | 19 | 14 | 18 |
| April | 7 | 8 | 6 | 7 | 5 |
| May | 8 | 8 | 8 | 11 | 8 |
| June | 11 | 9 | 10 | 15 | 11 |
| July | 11 | 8 | 13 | 11 | 12 |
| August | 11 | 10 | 11 | 9 | 12 |
| September | 11 | 9 | 10 | 14 | 13 |
| October-December | 22 | 25 | 23 | 18 | 20 |

| Route of Entry (%) | Total | Britain | M. Europe | N. America | Other Areas |
|--------------------------|-------|---------|--------------|---------------|----------------|
| Air from Britain | 36 | 81 | 5 | 23 | 49 |
| Air from Mainland Europe | 44 | - | 92 | 16 | 43 |
| Transatlantic Air | 12 | * | * | 60 | 4 |
| Sea from Britain | 7 | 18 | 1 | 1 | 3 |
| Sea from Mainland Europe | 1 | * | 2 | 1 | 1 |

| Accommodation Used (%) | Total | Britain | M. Europe | N. America | Other Areas |
|------------------------|-------|---------|--------------|---------------|----------------|
| Hotel | 51 | 54 | 43 | 64 | 45 |
| Guest house/ B&B | 7 | 5 | 8 | 7 | 5 |
| Rented | 4 | 3 | 5 | 4 | 9 |
| Caravan & Camping | * | * | | * | * |
| Hostel | 8 | 3 | 11 | 10 | 10 |
| Friends/ Relatives | 28 | 35 | 28 | 14 | 29 |
| Other | 3 | 1 | 5 | 2 | 4 |

| Accommodation Bednights (%) | Total | Britain | M. Europe | N. America | Other Areas |
|-----------------------------|-------|---------|--------------|---------------|----------------|
| Hotel | 19 | 35 | 15 | 31 | 8 |
| Guest house/ B&B | 3 | 3 | 4 | 3 | 2 |
| Rented | 26 | 5 | 27 | 28 | 41 |
| Caravan & Camping | 1 | 6 | * | * | * |
| Hostel | 5 | 3 | 7 | 6 | 2 |
| Friends/ Relatives | 28 | 48 | 28 | 15 | 24 |
| Other | 18 | 1 | 19 | 17 | 23 |

| Other Regions Visited (%) | Total | Britain | M. Europe | N. America | Other Areas |
|---------------------------|-------|---------|--------------|---------------|----------------|
| East & Midlands | 6 | 4 | 6 | 8 | 5 |
| South East | 8 | 3 | 6 | 18 | 16 |
| South West | 16 | 4 | 14 | 35 | 26 |
| Shannon | 9 | 3 | 7 | 20 | 12 |
| West | 15 | 5 | 16 | 29 | 22 |
| North West | 4 | 2 | 4 | 8 | 5 |

| Experience of Ireland (%) | Total | Britain | M. Europe | N. America | Other Areas |
|---------------------------|-------|---------|--------------|---------------|----------------|
| Irish Born | 10 | 20 | 5 | 6 | 7 |
| On First Visit | 45 | 16 | 54 | 64 | 67 |
| Repeat | 45 | 64 | 41 | 30 | 26 |

| Party Composition (%) | Total | Britain | M. Europe | N. America | Other Areas |
|-----------------------|-------|---------|--------------|---------------|----------------|
| Travelling Alone | 54 | 67 | 37 | 54 | 53 |
| Couple | 22 | 15 | 34 | 21 | 25 |
| Family | 9 | 7 | 13 | 8 | 9 |
| Other Adult Party | 15 | 11 | 16 | 18 | 13 |

| Social Class (%) | Total | Britain | M. Europe | N. America | Other Areas |
|-------------------------------|-------|---------|--------------|---------------|----------------|
| Managerial/ Professional (AB) | 23 | 25 | 19 | 26 | 26 |
| White Collar (C1) | 61 | 53 | 66 | 64 | 59 |
| Skilled Worker (C2) | 13 | 17 | 12 | 9 | 12 |
| Unskilled Worker (DE) | 3 | 5 | 3 | 1 | 3 |

| Age (%) | Total | Britain | M. Europe | N. America | Other Areas |
|----------------|-------|---------|--------------|---------------|----------------|
| Under 19 years | 8 | 4 | 11 | 6 | 6 |
| 19-24 years | 15 | 9 | 18 | 17 | 13 |
| 25-34 years | 24 | 22 | 28 | 19 | 27 |
| 35-44 years | 15 | 18 | 16 | 11 | 16 |
| 45-54 years | 17 | 21 | 15 | 19 | 15 |
| 55-64 years | 12 | 14 | 8 | 18 | 15 |
| 65+ years | 8 | 12 | 4 | 10 | 8 |

Holidaymakers to Dublin

| Month of Arrival (%) | Total | Britain | M. Europe | N. America | Other Areas |
|----------------------|-------|---------|--------------|---------------|----------------|
| January-March | 15 | 28 | 14 | 10 | 16 |
| April | 6 | 6 | 5 | 7 | 6 |
| May | 9 | 5 | 9 | 12 | 9 |
| June | 13 | 12 | 11 | 18 | 11 |
| July | 13 | 8 | 18 | 11 | 14 |
| August | 13 | 10 | 16 | 10 | 12 |
| September | 13 | 10 | 12 | 15 | 15 |
| October-December | 17 | 21 | 16 | 17 | 19 |

| Route of Entry (%) | Total | Britain | M. Europe | N. America | Other Areas |
|--------------------------|-------|---------|--------------|---------------|----------------|
| Air from Britain | 33 | 91 | 6 | 25 | 65 |
| Air from Mainland Europe | 43 | 1 | 88 | 15 | 26 |
| Transatlantic Air | 19 | - | * | 59 | 4 |
| Sea from Britain | 3 | 8 | 2 | 1 | 4 |
| Sea from Mainland Europe | 2 | - | 4 | 1 | 2 |

| Accommodation Used (%) | Total | Britain | M. Europe | N. America | Other Areas |
|------------------------|-------|---------|--------------|---------------|----------------|
| Hotel | 66 | 73 | 57 | 73 | 64 |
| Guest house/ B&B | 12 | 7 | 16 | 10 | 9 |
| Rented | 3 | 4 | 2 | 2 | 5 |
| Caravan & Camping | 1 | - | 2 | * | * |
| Hostel | 16 | 10 | 20 | 14 | 19 |
| Friends/ Relatives | 4 | 7 | 4 | 2 | 8 |
| Other | * | 1 | * | * | - |

| Accommodation Bednights (%) | Total | Britain | M. Europe | N. America | Other Areas |
|-----------------------------|-------|---------|--------------|---------------|----------------|
| Hotel | 53 | 70 | 47 | 65 | 27 |
| Guest house/ B&B | 11 | 6 | 14 | 9 | 13 |
| Rented | 12 | 5 | 9 | 9 | 39 |
| Caravan & Camping | 1 | - | 1 | * | * |
| Hostel | 16 | 9 | 21 | 14 | 11 |
| Friends/ Relatives | 7 | 9 | 8 | 3 | 10 |
| Other | * | 1 | * | 1 | - |

| Other Regions Visited (%) | Total | Britain | M. Europe | N. America | Other Areas |
|---------------------------|-------|---------|--------------|---------------|----------------|
|---------------------------|-------|---------|--------------|---------------|----------------|

| | | | | | |
|-----------------|----|----|----|----|----|
| East & Midlands | 9 | 2 | 11 | 10 | 7 |
| South East | 17 | 3 | 13 | 26 | 27 |
| South West | 34 | 9 | 30 | 49 | 49 |
| Shannon | 18 | 3 | 16 | 28 | 23 |
| West | 30 | 10 | 32 | 37 | 40 |
| North West | 8 | 1 | 9 | 9 | 9 |

| Experience of Ireland (%) | Total | Britain | M. Europe | N. America | Other Areas |
|---------------------------|-------|---------|--------------|---------------|----------------|
| Irish Born | 2 | 6 | * | 1 | 2 |
| On First Visit | 72 | 45 | 75 | 81 | 82 |
| Repeat | 26 | 49 | 24 | 18 | 16 |

| Party Composition (%) | Total | Britain | M. Europe | N. America | Other Areas |
|-----------------------|-------|---------|--------------|---------------|----------------|
| Travelling Alone | 21 | 23 | 20 | 18 | 30 |
| Couple | 41 | 38 | 40 | 45 | 39 |
| Family | 14 | 11 | 13 | 17 | 11 |
| Other Adult Party | 24 | 28 | 27 | 20 | 19 |

| Social Class (%) | Total | Britain | M. Europe | N. America | Other Areas |
|-------------------------------|-------|---------|--------------|---------------|----------------|
| Managerial/ Professional (AB) | 21 | 17 | 18 | 24 | 28 |
| White Collar (C1) | 63 | 59 | 66 | 63 | 56 |
| Skilled Worker (C2) | 14 | 19 | 13 | 12 | 13 |
| Unskilled Worker (DE) | 3 | 5 | 2 | 1 | 4 |

| Age (%) | Total | Britain | M. Europe | N. America | Other Areas |
|----------------|-------|---------|--------------|---------------|----------------|
| Under 19 years | 6 | 4 | 8 | 7 | 4 |
| 19-24 years | | | | | |

| | | | | | |
|-------------|----|----|----|----|----|
| | 16 | 15 | 19 | 14 | 12 |
| 25-34 years | 26 | 29 | 28 | 20 | 28 |
| 35-44 years | 13 | 13 | 15 | 9 | 18 |
| 45-54 years | 17 | 16 | 16 | 19 | 15 |
| 55-65 years | 14 | 14 | 8 | 21 | 14 |
| 65+ years | 8 | 10 | 5 | 12 | 10 |

| Gender (%) | Total | Britain | M. Europe | N. America | Other Areas |
|------------|-------|---------|--------------|---------------|----------------|
| Male | 40 | 45 | 42 | 36 | 38 |
| Female | 60 | 55 | 58 | 64 | 62 |

| Dependent Children (%) | Total | Britain | M. Europe | N. America | Other Areas |
|------------------------|-------|---------|--------------|---------------|----------------|
| Yes | 15 | 16 | 16 | 14 | 13 |
| No | 85 | 84 | 84 | 86 | 87 |

| Internal Transport Used (%) | Total | Britain | M. Europe | N. America | Other Areas |
|--|-------|---------|-----------|------------|-------------|
| Intercity train | 6 | 2 | 6 | 6 | 9 |
| Intercity bus | 8 | 2 | 12 | 7 | 7 |
| Local train | 14 | 15 | 16 | 11 | 16 |
| Local bus | 42 | 51 | 50 | 31 | 29 |
| Organised coach tour involving an overnight) | 13 | 6 | 8 | 22 | 16 |
| Organised coach tour not involving an overnight) | 8 | 10 | 6 | 9 | 11 |
| Hired car/ minibus | 27 | 9 | 26 | 37 | 31 |
| Private car | 6 | 10 | 8 | 2 | 7 |
| Campervan | * | - | 1 | - | - |
| Car with caravan | * | - | * | - | - |
| Motorcycle/ bicycle | 1 | 1 | 1 | * | * |
| Walking (for transport not leisure) | 40 | 44 | 43 | 34 | 41 |
| Hitch-hiking | 1 | * | 1 | 1 | 2 |
| Taxi | 28 | 42 | 24 | 27 | 27 |

| Use of Car (%) | Total | Britain | M. Europe | N. America | Other Areas |
|----------------|-------|---------|-----------|------------|-------------|
| Car brought | 3 | 4 | 4 | * | - |
| Car hired | 27 | 9 | 26 | 37 | 31 |
| Car not used | 71 | 87 | 70 | 63 | 69 |

| Whether Travelling on a Package (%) | Total | Britain | M. Europe | N. America | Other Areas |
|-------------------------------------|-------|---------|-----------|------------|-------------|
| Package | 22 | 12 | 19 | 31 | 24 |
| Independent | 78 | 88 | 81 | 69 | 76 |

| Type of holiday (%) | Total | Britain | M. Europe | N. America | Other Areas |
|---------------------|-------|---------|-----------|------------|-------------|
|---------------------|-------|---------|-----------|------------|-------------|

| | | | | | |
|--|----|----|----|----|----|
| A city break | 51 | 81 | 51 | 36 | 38 |
| A predominantly city-urban based holiday | 7 | 4 | 7 | 7 | 12 |
| A predominantly countryside holiday | 13 | 4 | 14 | 16 | 16 |
| A City-urban and countryside holiday | 30 | 11 | 28 | 41 | 35 |

| Promotable Holiday (%) | Total | Britain | M. Europe | N. America | Other Areas |
|--------------------------------|-------|---------|--------------|---------------|----------------|
| Hired car - paid accommodation | 22 | 8 | 22 | 28 | 30 |
| Touring - paid accommodation | 15 | 9 | 12 | 20 | 18 |
| Dublin Break | 28 | 64 | 21 | 17 | 24 |
| Youth Budget | 14 | 11 | 17 | 12 | 18 |
| Activity specialist | 11 | 6 | 12 | 14 | 6 |

| Value for Money (%) | Total | Britain | M. Europe | N. America | Other Areas |
|---------------------|-------|---------|--------------|---------------|----------------|
| Good | 36 | 28 | 36 | 40 | 39 |
| Fair | 32 | 20 | 37 | 32 | 37 |
| Poor | 32 | 52 | 27 | 28 | 24 |

Accommodation in Dublin

| Approved Room Capacity | 2006 | 2007 | 2008 | 2009 | 2010 |
|-----------------------------|---------------|---------------|---------------|---------------|---------------|
| Hotels | | | | | |
| 5* | | | | | 1,492 |
| | 1,832 | 1,832 | 1,611 | 1,492 | |
| 4* | | | | | 7,755 |
| | 3,668 | 3,803 | 6,111 | 7,162 | |
| 3* | | | | | 8,892 |
| | 5,522 | 6,232 | 8,592 | 9,349 | |
| 2* | | | | | 901 |
| | 852 | 852 | 864 | 914 | |
| 1* | | | | | 99 |
| | 75 | 75 | 150 | 140 | |
| Other | | | | | 46 |
| | 1,948 | 3,488 | 385 | 54 | |
| Total Hotels | | | | | 19,185 |
| | 13,897 | 16,282 | 17,713 | 19,111 | |
| Guesthouses and B&Bs | | | | | 1,223 |
| | 1,799 | 1,614 | 1,474 | 1,343 | |
| Total Paid Serviced | | | | | 20,408 |
| | 15,696 | 17,896 | 19,187 | 20,454 | |
| Self-catering (Registered)* | | 60 | 60 | | 63 |
| | 59 | | | 63 | |
| Hostels** | | | | | |
| | 2,770 | 2,514 | 2,560 | 2,776 | 2,776 |

* Self-catering registered figures are units (e.g. houses)

** Hostel figures are beds available.

Top Visitor Attractions in Dublin

| Name of Attraction | 2010 |
|---------------------------------|---------|
| Dublin Zoo | 963,053 |
| Guinness Storehouse | 930,000 |
| The National Gallery of Ireland | 736,855 |

| | |
|----------------------------|---------|
| National Aquatic Centre | 721,871 |
| National Botanic Gardens | 533,120 |
| Book of Kells | 469,674 |
| Irish Museum of Modern Art | 408,000 |
| St Patrick's Cathedral | 300,211 |
| Kilmainham Gaol | 278,108 |
| Farmleigh | 267,904 |
| Science Gallery | 220,000 |
| Old Jameson Distillery | 208,767 |
| Chester Beatty Library | 206,653 |

Notes to Tables:

Note 1: *Holidaymakers* are defined as visitors who stated that their main reason for visiting Ireland was a holiday.

Note 2: *Approved Room Capacity* is supplied by Gulliver/TAMS/TCS Fáilte Ireland

Note 3: In the tables, * means less than 0.5%, - means 0%.

Estimates are based on information from Fáilte Ireland's Survey of Overseas Travellers in 2010, the 2010 Visitor Attractions Survey and from the CSO's Country of Residence Survey (CRS) and Household Travel Survey, and Fáilte Ireland's Survey of Overseas Travellers in previous years.

NOTE: Preliminary numbers and revenue for 2010 *will change* when final tourism estimates for the year become available from the Central Statistics Office.

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