



Fáilte Ireland

National Tourism Development Authority

PUTTING TOURISM & TOURISM STATISTICS IN CONTEXT

5 June 2014



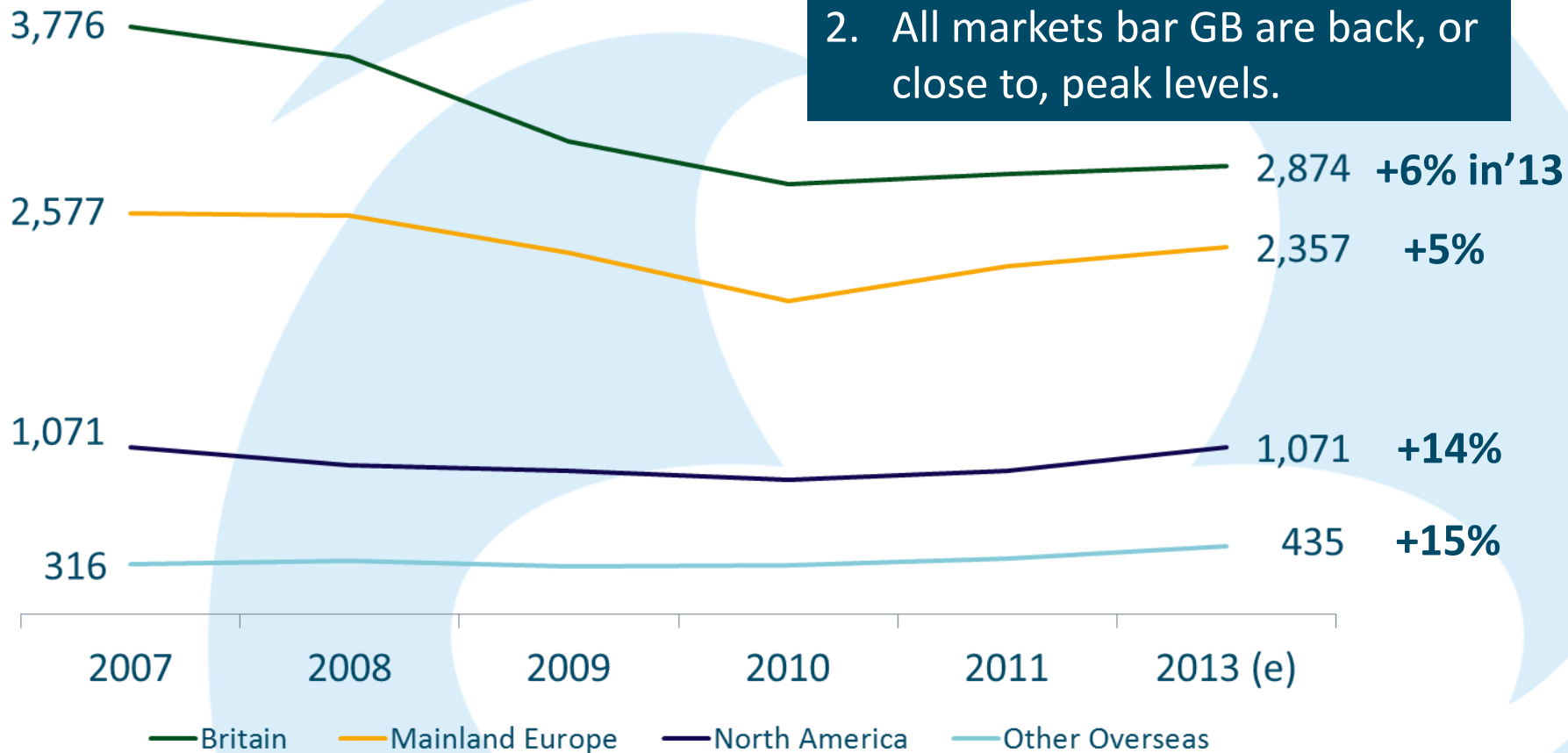
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Overseas Markets: Recent Trends & Top Line Performance

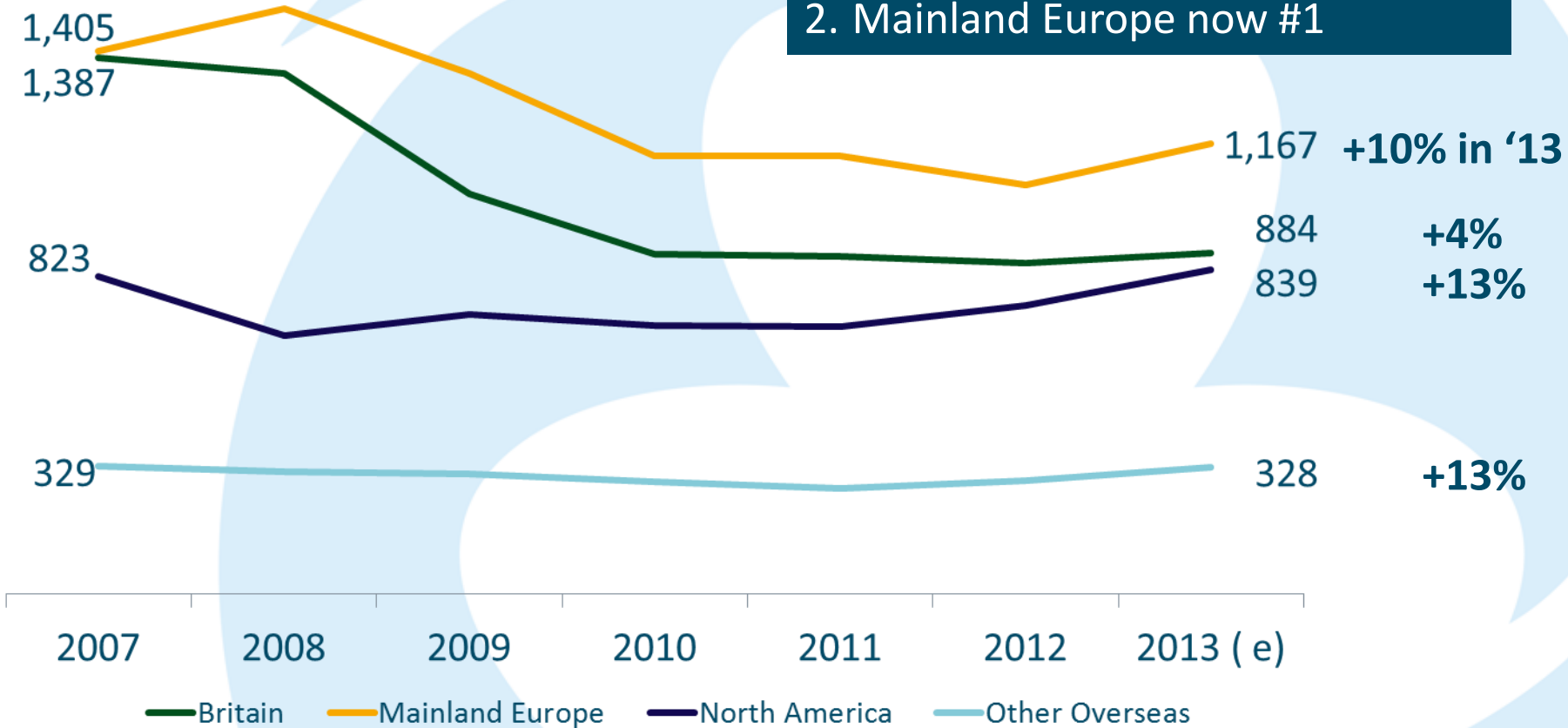
Overseas Visitors (000) to Ireland 2007-2013(e)

1. Overseas trips up 7% in 2013
2. All markets bar GB are back, or close to, peak levels.



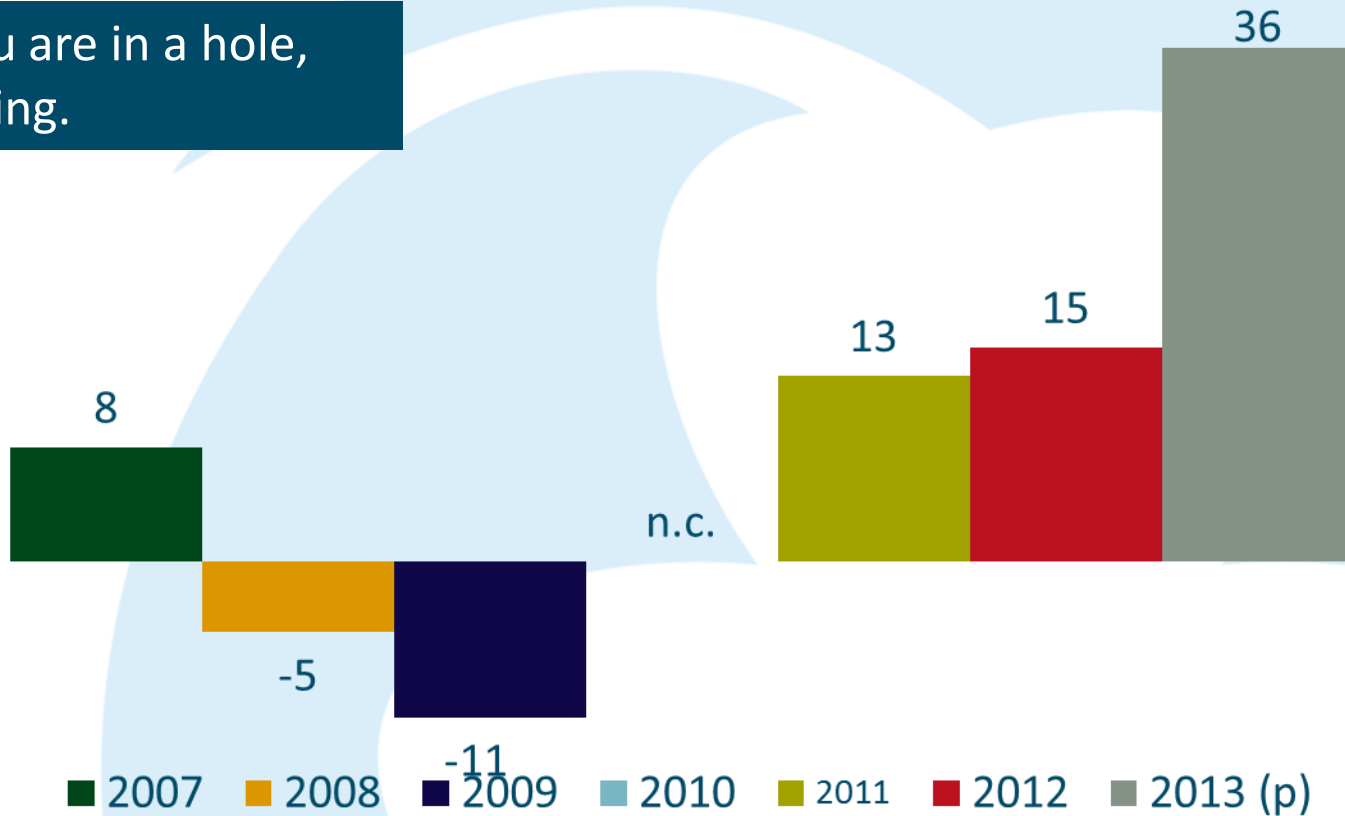
Overseas Tourism Earnings (€mn) 2007-2013(e)

1. Overseas revenue up 7% in 2013
2. Mainland Europe now #1



Value for Money: Net Rating 2007-2013

When you are in a hole,
stop digging.



Ratings range: very good; good; fair; poor; very poor

Net Rating = (Very good + good) - (poor + very poor)

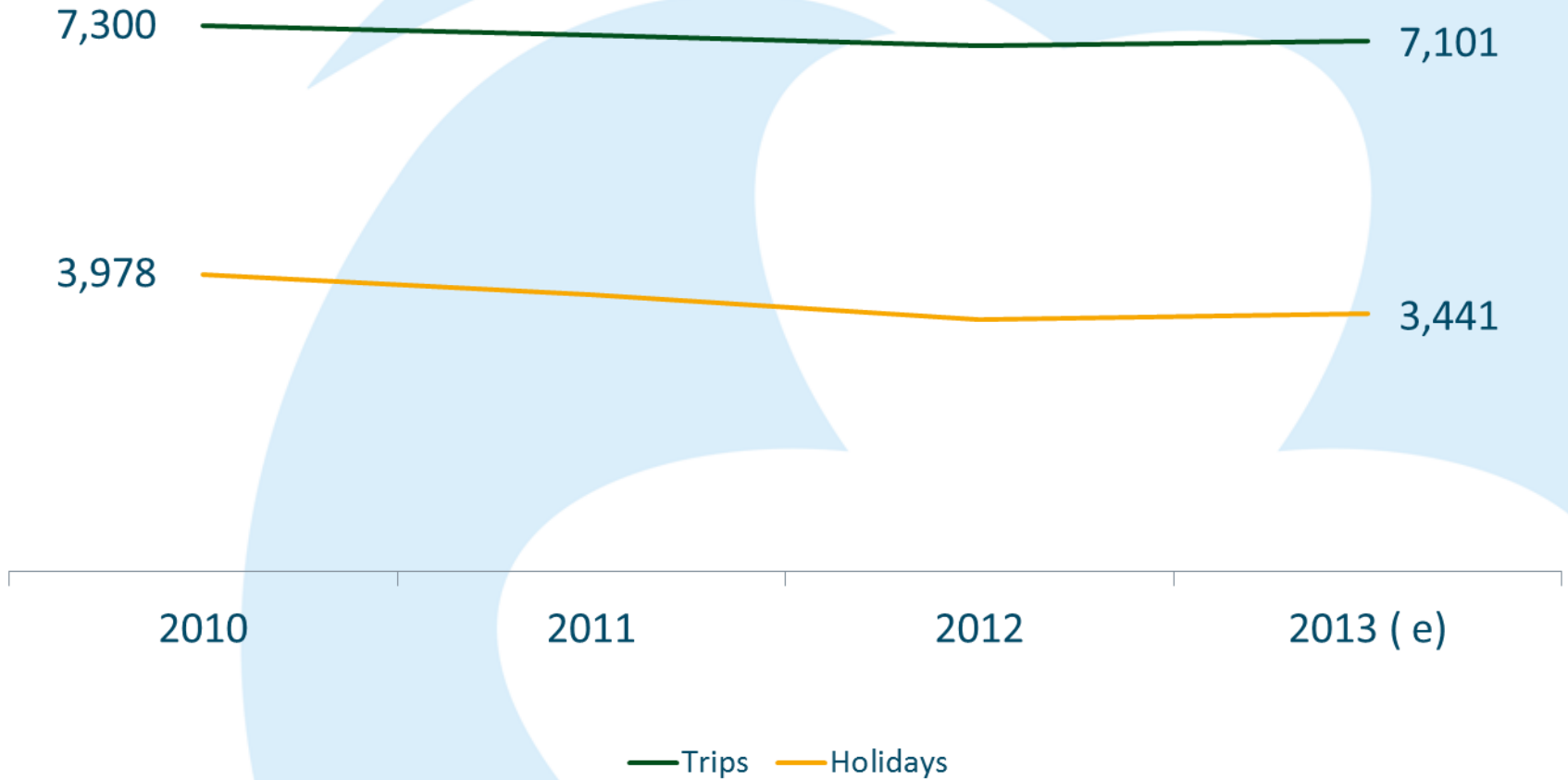


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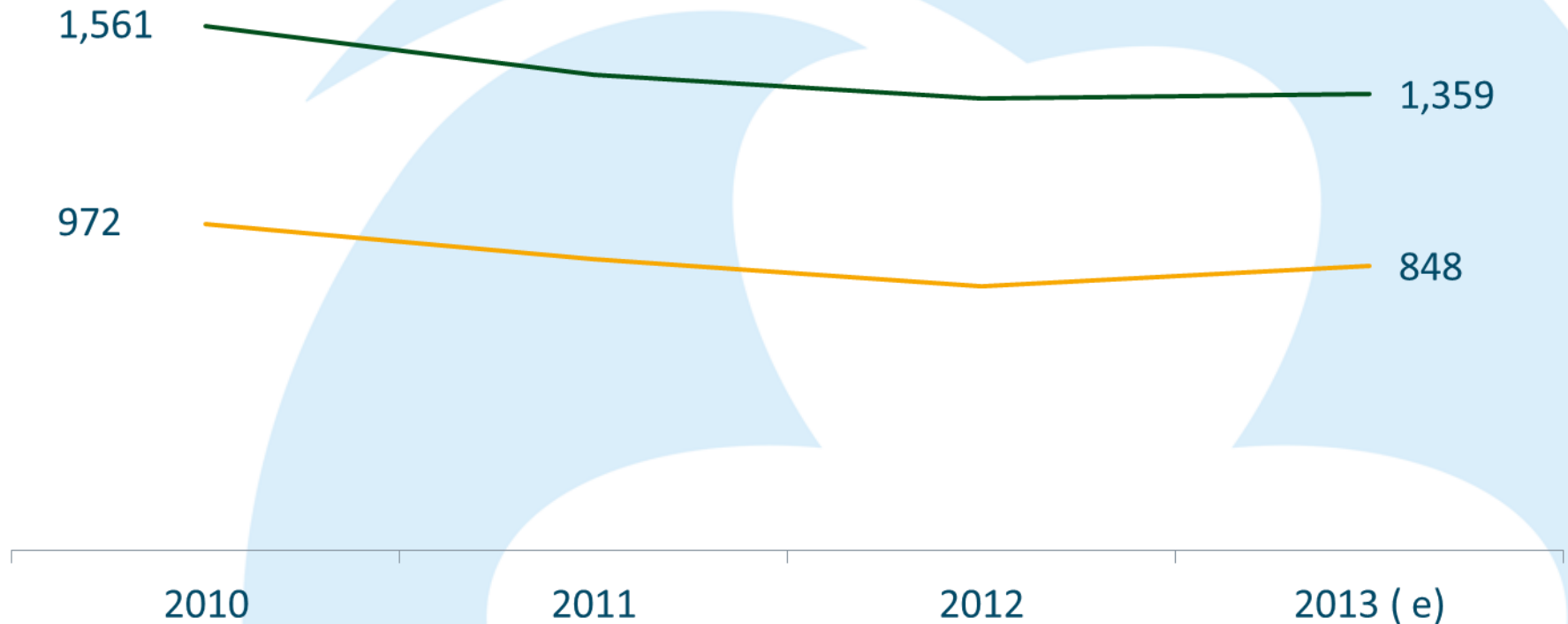
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The Domestic Market: Recent Trends & Top Line Performance

Domestic Tourism Volume (000) 2010-2013(e)



Domestic Tourism Revenue (€mn) 2010-2013(e)



1. Switching from holiday into VFR trips.
2. Declining holiday trip length.

— Trips — Holidays



The Nature of Tourism Statistics

*'Tourism is **defined by the activities of persons identified as visitors**. A visitor is someone who is making a visit to a main destination outside his/her usual environment for less than a year for any main purpose [including] holidays, leisure and recreation, business, health, education or other purposes....*

*As a **demand side phenomenon**, the economic contribution of tourism has to be approached from the activities of visitors.*



The Nature of Tourism Statistics

Tourism's demand side defined nature gives rise to a number of challenges:

- The **unit of analysis tends to be the visitor** rather than the service provider or producer.
- It is a '**blind spot**' in the **national accounts** and it is very difficult to compare. Hence, the UNWTO's efforts to develop Tourism Satellite Accounts.
- The sector is **more open** than most to being subject **to impact studies of questionable merit.**



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