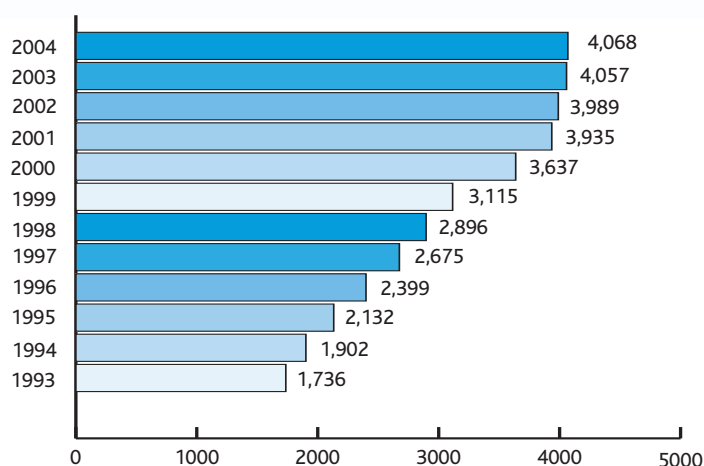




Tourism Performance in 2004

Expenditure by visitors to Ireland (including receipts paid to Irish carriers by foreign visitors) was estimated to be worth €4.1 billion in 2004.

Total Foreign Exchange Earnings 1993-2004 (€m)



In 2004, overseas tourist visits to Ireland increased by 3.3% to 6.4 million, exceeding the volume of tourists arriving in Ireland in 2000, the previous record year. While tourist numbers from Britain decreased by 1% on last year, Mainland European and North American tourists grew by 7%. However numbers from North America remain 9% below the record level achieved in 2000. Visitors from the other long haul markets increased by 28%, albeit on a small base.

While the number of overseas tourists to Ireland increased by 3% overall in 2004, this was a weaker performance when ranked alongside the global picture and that for arrivals in Europe. The World Tourism Organisation's preliminary estimates for 2004 show an increase of 10% in world arrivals and 4% growth in European arrivals.

Economic Benefits

In 2004, out-of-state tourist expenditure, including spending by visitors from Northern Ireland, amounted to €3.4 billion; with a further expenditure of €0.6 billion by overseas visitors on fares to Irish carriers, total foreign exchange earnings were €4.1 billion. Domestic tourism expenditure amounted to €1.04 billion making tourism in total a €5.1 billion industry in 2004.

Government earned estimated revenue of €2.3 billion through taxation of tourism expenditure, of which almost €2 billion came

from foreign tourism. It is estimated that for every euro spent by out-of-state tourists, 52c eventually ends up with the government through VAT, excise duty, PAYE, etc.

In 2004 the value of exported goods and services is estimated at €117.4 billion of which €4.1 billion can be directly attributed to tourism, accounting for 3.5% of exports. Tourism goods have low import content in comparison to other exports.

Total foreign and domestic tourism revenue of €5.1 billion in 2004 generated an overall GNP impact of €4.78 billion after applying multiplier effects (direct, indirect, induced and "Government interacting"). As a result total tourism revenue accounted for 3.9% of GNP¹.

Tourism is characterised by the fact that consumption takes place where the service is available, and because tourism activity is particularly concentrated in areas which lack an intensive industry base, it is credited with having a significant regional distributive effect.

Employment²

The estimated total number of people employed in the Irish tourism and catering industry in 2004 was 230,927, little changed on the 2003 figures.

Numbers Employed by Sector, 2001-2004

Sector/Year	2001	2002	2003	2004
Hotels	54,275	54,656	54,164	53,637
Guesthouses	2,943	2,914	2,879	2,849
Self-Catering Accommodation	3,830	n/a	3,878	3,848
Restaurant	41,827	41,409	41,085	41,367
Non-Licensed Restaurant	13,849	n/a	15,642	15,407
Licensed Premises	78,225	80,121	79,319	78,803
Tourism Services & Attractions	34,568	34,852	34,749	35,016
TOTAL	229,517	n/a	231,716	230,927

In 2004, Dublin accounted for 26% of tourism employment, the remainder of the Southern and Eastern Region accounted for 46% and the Border, Midland and Western Region accounted for 28%.

Of the 230,927 people employed in tourism-related services, 78% were Irish nationals and 22% were of international origin.

¹ Source: CSO Quarterly Survey.

² Fáilte Ireland's Tourism Business and Employment Survey.

Tourism Numbers 2000-2004

Where did Ireland's tourists come from?					
Numbers (000s)	2000	2001	2002	2003	2004
Britain	3,428	3,340	3,452	3,553	3,526
Mainland Europe	1,436	1,336	1,378	1,484	1,582
Germany	319	285	288	302	298
France	283	280	298	321	297
Italy	186	157	157	176	186
Netherlands	179	182	162	146	151
Belgium/Luxembourg	89	81	104	96	100
Spain	89	100	113	133	157
Nordics	159	129	108	124	126
Switzerland	49	38	42	51	65
Other Europe	83	84	106	135	202
North America	1,056	903	844	892	956
USA	958	829	759	809	867
Canada	98	74	85	84	89
Rest of World	261	261	245	249	319
Australia/New Zealand	148	132	113	109	146
Japan	28	22	22	22	31
Other Overseas	85	107	110	118	142
Total Overseas	6,181	5,840	5,919	6,178	6,384
Northern Ireland	465	513	557	586¹	598
Out-of-State	6,646	6,353	6,476	6,764	6,982
Domestic Trips	5,478	6,307	6,452	6,657	7,001

Source surveys are designed to measure area of residence groupings (bold figures). Other figures 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.

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

¹ Revised.

Source: CSO/Fáilte Ireland/NITB.

Tourism Revenue 2000-2004

How much money did they spend?					
Revenue (€m)	2000	2001	2002	2003	2004
Britain	1,087.7	1,210.6	1,283.3	1,319.1	1,276.1
Mainland Europe	727.0	814.6	866.6	885.1	930.4
Germany	172.0	197.2	181.5	184.3	177.4
France	119.8	161.8	185.3	147.1	158.3
Italy	90.4	111.8	110.7	120.9	98.2
Netherlands	92.2	78.8	85.4	78.1	90.3
Other Europe	252.6	265.0	303.7	354.7	406.3
North America	688.6	717.5	709.0	787.2	772.1
Other Overseas	178.4	209.0	228.7	236.4	256.3
Total Overseas	2,681.6	2,951.7	3,087.5	3,227.7	3,234.9
Northern Ireland ¹	123.3	142.8	161.2	175.5 ²	183.1
Total Out-of-State	2,804.9	3,094.5	3,248.7	3,403.2	3,418.0
Overseas Same-day Visits	19.1	20.5	17.3	20.8	22.0
Carrier Receipts	813.0	820.0	723.0	633.0	628.0
TOTAL FOREIGN EXCHANGE EARNINGS	3,637.0	3,935.0	3,989.0	4,057.0	4,068.0
Domestic Trips	706.6	879.9	849.4	970.9	1,037.2
Total Tourism Revenue	4,343.6	4,814.9	4,838.4	5,027.9	5,105.2

Source surveys are designed to measure area of residence groupings (bold figures). Other figures are indicative of approximate overall market performance but do not provide a sufficient level of precision to accurately reflect absolute spend or trends over time.

Note: ¹ Northern Ireland revenue includes expenditure on same-day visits by Northern Ireland residents.

² Revised.

Source: CSO/Fáilte Ireland/NITB.

Where did tourists go and how much did they spend in 2004?

Regional Numbers (000s) and Revenue (€m)				
Numbers (000s)	Overseas	N.	Domestic	Total
Revenue (€m)	Tourists	Ireland		
Dublin	3,680	192	976	4,848
	1,163.0	64.6	143.7	1,371.3
Midlands/East	777	30	873	1,680
	248.4	7.1	90.3	345.8
South-East	974	11	1,113	2,098
	267.4	2.6	150.9	420.9
South-West	1,578	51	1,428	3,057
	652.1	22.6	248.0	922.7
Shannon	1,075	54	791	1,920
	281.1	14.1	111.0	406.2
West	1,250	43	1,251	2,544
	460.4	15.7	210.1	686.2
North-West	487	234	569	1,290
	162.5	56.4	83.2	302.1
Total Revenue	3,234.9	183.1	1,037.2	4,455.2

Overseas Tourists 2004

How did overseas tourists spend their money in Ireland?

Breakdown of spend in Ireland (%)					
	Total	Britain	M.Europe	N.America	Rest of World
Bed & Board	29	26	32	28	31
Other Food & Drink	37	44	34	31	33
Sightseeing/Entertainment	4	3	4	6	6
Internal Transport	9	9	8	10	7
Shopping	16	15	16	18	16
Miscellaneous	5	3	6	6	7

When did they arrive?

(%)	Total	Britain	M.Europe	N.America	Rest of World
January-March	17	19	14	17	15
April	9	9	9	7	7
May	9	9	10	11	11
June	9	8	10	11	10
July	12	11	16	12	12
August	12	12	13	10	12
September	9	9	8	11	11
October-December	22	23	20	21	21

Source: CSO.

How did they arrive/depart?

(%)	Total	Britain	M.Europe	N.America	Rest of World
Air					
From Britain	49	67	16	33	69
From M. Europe	21	1	73	8	20
Transatlantic	9	1	*	54	1
Sea					
From Britain	18	28	7	4	6
From M. Europe	1	-	4	*	*
Via N. Ireland	3	4	1	2	4

Source: CSO (*indicates less than 0.5 percent, - indicates 0).

Where did they stay? (Distribution of Bednights)

(%)	Total	Britain	M.Europe	N.America	Rest of World
Hotels	23	24	17	36	15
Guesthouses/B&Bs	15	11	18	19	11
Rented	19	17	23	13	19
Caravan & Camping	2	2	4	*	1
Hostels	3	1	5	4	5
Friends/Relatives	28	40	19	20	35
Other	10	5	14	8	14
Nights (Mn)	47.4	17.6	16.5	8.9	4.4

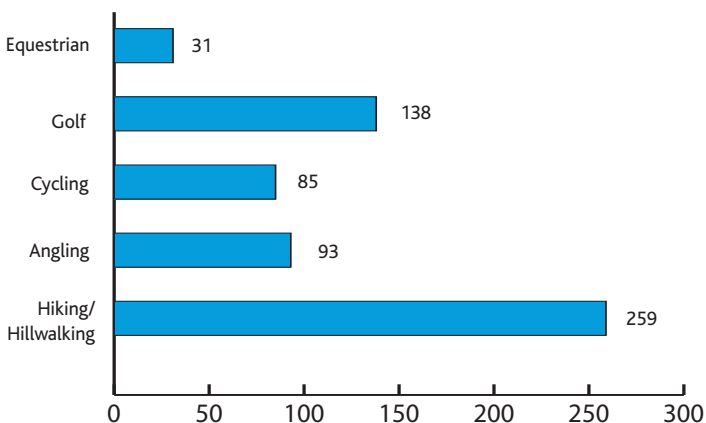
Source: CSO (*indicates less than 0.5 percent)

What was their main reason for visiting Ireland?

(%)	Total	Britain	M.Europe	N.America	Rest of World
Holiday	53	49	52	69	52
Visit Friends/Relatives	28	33	21	20	29
Business	13	13	18	7	11
Other	6	5	9	4	8

Source: CSO and NITB.

What activities did they engage in? (000s)



Overseas Holidaymakers 2004

Holidaymakers in this section are defined as visitors who stated that their primary purpose for visiting Ireland was a holiday.

What was the number of holidaymakers in 2004?

(000s)	Total	Britain	M.Europe	N.America	Rest of World
2000	3,320	1,644	803	722	151
2001	3,140	1,623	743	626	148
2002	3,216	1,751	757	579	130
2003	3,291	1,779	772	616	124
2004	3,367	1,718	825	656	167

Source: CSO and NITB.

How did they arrange their holiday?

(%)	Total	Britain	M.Europe	N.America	Rest of World
Package*	21	16	20	30	17
Independent	79	84	80	70	83

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

Was this their first trip to Ireland?

(%)	Total	Britain	M.Europe	N.America	Rest of World
First Visit	56	42	64	68	75
Repeat	39	50	34	30	22
Irish-Born	5	9	3	3	3

Did they use a car?

(%)	Total	Britain	M.Europe	N.America	Rest of World
Car Brought	18	33	13	*	4
Car Hired	29	16	31	47	36
Car Not Used	53	51	56	53	60

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

Age	Social Class	Party Composition
Under 25 yrs	20 Managerial/Professional (AB)	23 Alone
25-34 yrs	18 White Collar (C1)	56 Couple
35-44 yrs	17 Skilled Worker (C2)	16 Family
45+ yrs	44 Unskilled Worker (DE)	4 Other Adult Group

The Tourism Product: Accommodation in 2004 *

	Premises	Rooms (000s)
Hotels	846	43
Guesthouses	461	5
Farmhouses and Town & Country Homes**	3,278	14
Self-Catering***	2,817	7
University Accommodation	13	3
Hostels****	175	10

* Source Gulliver (January 2004).

** Includes specialist and pub accommodation.

*** Registered group scheme only.

**** Two hostel beds constitute one room.



Fáilte Ireland

All estimates are based on information from the CSO's Country of Residence Survey, Passenger Card Inquiry and Household Travel Survey. Fáilte Ireland's Survey of Overseas Travellers (SOT) and the Northern Ireland Passenger Survey (NIPS).

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