Tourism Facts 2004

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)

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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1,736</td>
<td>1,902</td>
<td>2,132</td>
<td>2,399</td>
<td>2,675</td>
<td>2,896</td>
<td>3,115</td>
<td>3,637</td>
<td>3,935</td>
<td>3,989</td>
<td>4,057</td>
<td>4,068</td>
</tr>
</tbody>
</table>

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 GNP.

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.

Employment

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.

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Numbers Employed by Sector, 2001-2004

<table>
<thead>
<tr>
<th>Sector/Year</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>54,275</td>
<td>54,656</td>
<td>54,164</td>
<td>53,637</td>
</tr>
<tr>
<td>Guesthouses</td>
<td>2,943</td>
<td>2,914</td>
<td>2,879</td>
<td>2,849</td>
</tr>
<tr>
<td>Self-Catering</td>
<td>3,630</td>
<td>n/a</td>
<td>3,678</td>
<td>3,648</td>
</tr>
<tr>
<td>Restaurant</td>
<td>41,827</td>
<td>41,409</td>
<td>41,085</td>
<td>41,367</td>
</tr>
<tr>
<td>Non-Licensed</td>
<td>13,849</td>
<td>n/a</td>
<td>15,642</td>
<td>15,407</td>
</tr>
<tr>
<td>Licensed Premises</td>
<td>78,225</td>
<td>80,121</td>
<td>79,319</td>
<td>78,803</td>
</tr>
<tr>
<td>Tourism Services &amp; Attractions</td>
<td>34,568</td>
<td>34,852</td>
<td>34,749</td>
<td>35,016</td>
</tr>
<tr>
<td>TOTAL</td>
<td>229,517</td>
<td>n/a</td>
<td>231,716</td>
<td>230,927</td>
</tr>
</tbody>
</table>

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.
Equestrian

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

CSO/Fáilte Ireland/NITB.

123.3 142.8 161.2 175.5 183.1

CSO and NITB.

3,234.9 183.1 1,037.2 4,455.2

CSO (*indicates less than 0.5 percent)

Tourists Ireland

Revised.

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

CSO and NITB.

Hillwalking

Cycling

Hiking/

0 50 100 150 200 250 300

31

85

93

259

Tourism Revenue 2000-2004

Where did Ireland's tourists come from?

Regional Numbers (000s) and Revenue (€m)

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

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

* Revised. Source: CSO/Eirithe Ireland/NITB.

When did they stay? (Distribution of Bednights)

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

Source: CSO/Eirithe Ireland/NITB.

Tourism Facts 2004

Where did they stay? (Distribution of Bednights)

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

Source: CSO/Eirithe Ireland/NITB.

Did they use a car?

How did they arrange their holiday?

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

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

Source: CSO/Eirithe Ireland/NITB.

Tourism Revenue 2000-2004

How much did they spend?

Regional Numbers (000s) and Revenue (€m)

How did they arrive?/When did they arrive?

Regional Numbers (000s) and Revenue (€m)

Where did they stay? (Distribution of Bednights)

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

Source: CSO/Eirithe Ireland/NITB.

Overseas Trips 2004

How did overseas tourists spend their money in Ireland?

Breakdown of spend in Ireland (%)

Source: CSO/Eirithe Ireland/NITB.

Tourism Facts 2004

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

Regional Numbers (000s) and Revenue (€m)

Where did they stay? (Distribution of Bednights)

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

Source: CSO/Eirithe Ireland/NITB.

Overseas Holidays 2004

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

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

Source: CSO/Eirithe Ireland/NITB.
Equestrian

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

CSO.

CSO and NITB.

Revised.

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

CSO/Fáilte Ireland/NITB.

(2) CSO (*indicates less than 0.5 percent, – indicates 0).

CSO and NITB.

CSO/Fáilte Ireland/NITB.

Revised.

3,234.9 183.1 1,037.2 4,455.2

123.3 142.8 161.2 175.5 183.1

Tourists Ireland

Hillwalking

Angling

Hiking/

Golf

Equestrian

0 50 100 150 200 250

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

Regional Numbers (000s) and Revenue (£m)

<table>
<thead>
<tr>
<th>Region</th>
<th>Overseas Tourists</th>
<th>Domestic Tourists</th>
<th>Total Tourists</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(m)</td>
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<td>(m)</td>
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<td></td>
<td>(m)</td>
<td>(m)</td>
<td>(m)</td>
</tr>
<tr>
<td>Dublin</td>
<td>3,680</td>
<td>192</td>
<td>3,872</td>
</tr>
<tr>
<td>Midlands/East</td>
<td>1,163</td>
<td>64</td>
<td>1,227</td>
</tr>
<tr>
<td>South-East</td>
<td>974</td>
<td>11</td>
<td>985</td>
</tr>
<tr>
<td>South-West</td>
<td>1,578</td>
<td>51</td>
<td>1,629</td>
</tr>
<tr>
<td>Shannon</td>
<td>1,075</td>
<td>54</td>
<td>1,129</td>
</tr>
<tr>
<td>West</td>
<td>1,250</td>
<td>43</td>
<td>1,293</td>
</tr>
<tr>
<td>North-West</td>
<td>487</td>
<td>56</td>
<td>543</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>3,234.9</td>
<td>183.1</td>
<td>3,418.0</td>
</tr>
</tbody>
</table>

Where did tourists stay? (Distribution of Bednights)

<table>
<thead>
<tr>
<th>Distribution of Bednights (%)</th>
<th>Total</th>
<th>Britain</th>
<th>M.Europe</th>
<th>N.America</th>
<th>Rest of World</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(%)</td>
<td>Total</td>
<td>(%)</td>
<td>(%)</td>
<td>(%)</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>Britain</td>
<td>M.Europe</td>
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<tr>
<td></td>
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<td>(m)</td>
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<td></td>
<td></td>
<td>(m)</td>
<td>(m)</td>
<td>(m)</td>
<td>(m)</td>
</tr>
<tr>
<td>Hotels</td>
<td>23</td>
<td>24</td>
<td>17</td>
<td>36</td>
<td>15</td>
</tr>
<tr>
<td>Guesthouses/B&amp;Bs</td>
<td>15</td>
<td>11</td>
<td>18</td>
<td>19</td>
<td>11</td>
</tr>
<tr>
<td>Rented</td>
<td>19</td>
<td>17</td>
<td>23</td>
<td>19</td>
<td>13</td>
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<tr>
<td>Caravan &amp; Camping</td>
<td>2</td>
<td>2</td>
<td>4</td>
<td>1</td>
<td>4</td>
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<tr>
<td>Hostels</td>
<td>3</td>
<td>1</td>
<td>5</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Friends/Relatives</td>
<td>28</td>
<td>40</td>
<td>19</td>
<td>20</td>
<td>35</td>
</tr>
<tr>
<td>Other</td>
<td>10</td>
<td>5</td>
<td>14</td>
<td>8</td>
<td>14</td>
</tr>
<tr>
<td>Nights (%)</td>
<td>47.4</td>
<td>17.6</td>
<td>16.5</td>
<td>8.9</td>
<td>4.4</td>
</tr>
</tbody>
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