

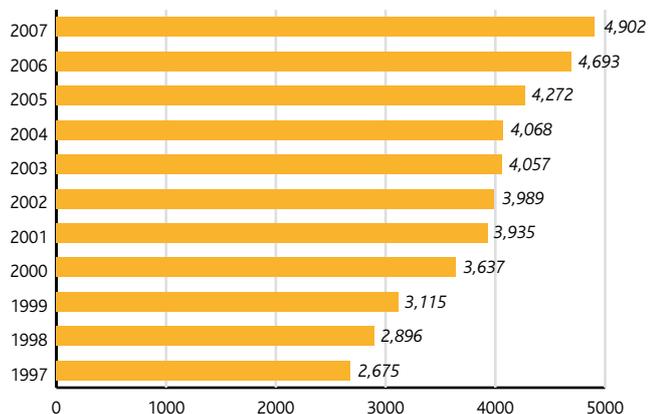


TOURISM FACTS 2007

Tourism Performance in 2007

Expenditure by visitors to Ireland (including receipts paid to Irish carriers by foreign visitors) was estimated to be worth €4.9 billion in 2007.

Total Foreign Exchange Earnings 1997-2007 (€m)



Overseas tourist visits to Ireland in 2007 increased by 4% to 7.7 million. Tourist numbers from Mainland Europe recorded substantial growth of 14%, driven both by traditional markets such as Spain, France, Germany, Italy and the Nordic Countries and the emerging markets in Other Europe. Poland continues to grow faster than other European countries and is now the third largest European market. The volume of North American tourists grew by 4%. Tourist numbers from Britain fell by -1%, and the other long haul markets grew by just 2%.

The growth of 4.3% in tourist arrivals to Ireland was somewhat behind the growth of 6.6% in world arrivals reported by the World Tourism Organisation. Ireland's reported increase of 4.3% in international arrivals is twice the rate achieved by Northern Europe (+2.2%) which includes Ireland.

Estimates show that US citizen travel to Europe increased by 2.6% in 2007, which means that Ireland with a 3.1% growth in US visitors has increased its share of US travellers to Europe.

Economic Benefits

- In 2007, out-of-state tourist expenditure, including spending by visitors from Northern Ireland, amounted to €4.2 billion. With a further €0.7 billion spent by overseas visitors on fares to Irish carriers, total foreign exchange earnings were €4.9 billion. Domestic tourism expenditure amounted to €1.55 billion making tourism in total a €6.45 billion industry in 2007.
- Government earned estimated revenue of €2.9 billion through taxation of tourism expenditure, of which €2.37 billion came from foreign tourism. It is estimated that for every Euro spent by out-of-state tourists while in Ireland, 52c eventually ends up with the government (through VAT, excise duty, PAYE, etc).

- In 2007 the value of exported goods and services was estimated at €151.4 billion of which €4.9 billion¹ can be directly attributed to tourism, accounting for 3.2% of exports. Being largely service based, tourism goods have low import content in comparison to other exports.

- Total foreign and domestic tourism revenue of €6.45 billion in 2007 generated an overall GNP impact of €5.97 billion after applying multiplier effects (direct, indirect, induced and "Government interacting"). As a result, total tourism revenue accounted for 3.7% of GNP¹.

- Because tourism is characterised by the fact that consumption takes place where the service is available and 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 hospitality industry in 2007 was 322,000. **This estimate is not comparable to previous years due to a change in the methodology used to collect the data.**

Numbers Employed by Sector 2007

Sector	2007
Hotels	72,000
Guesthouses	3,000
Self-Catering Accommodation	4,000
Restaurant	64,000
Non-Licensed Restaurant	13,000
Licensed Premises	102,000
Tourism Services & Attractions	64,000
TOTAL	322,000

- In 2007, Dublin accounted for 27% of tourism and hospitality employment, the East & Midlands and South East regions also accounted for 27% and the Western seaboard regions accounted for the remaining 46%.
- Of the 322,000 people employed in tourism-related services almost 257,000 were year-round employees, and of these 67% were Irish nationals and 33% were of international origin.

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

¹ Source: CSO Quarterly Survey

² Fáilte Ireland's Tourism Employment and Training Survey

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For more information on the extensive range of research and advisory publications available, please ring (01) 602 4193 for details.

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

Tourism Numbers 2003 – 2007

Where did Ireland's tourists come from?					
Numbers (000s)	2003	2004	2005	2006	2007
Britain	3,553	3,526	3,640	3,821	3,776
Mainland Europe	1,484	1,582	1,903	2,252	2,577
Germany	302	298	402	417	436
France	321	297	310	360	394
Italy	176	186	190	248	265
Netherlands	146	151	157	155	155
Belgium	85	92	84	95	82
Denmark	27	31	38	42	54
Sweden	51	42	59	74	96
Spain	133	157	171	198	249
Poland	17	39	125	230	308
Czech Republic	12	22	35	41	43
Austria	38	33	38	51	40
Switzerland	51	65	54	52	59
Other Europe	125	169	240	289	396
North America	892	956	937	1,034	1,071
USA	809	867	854	945	975
Canada	84	89	83	89	96
Rest of World	249	320	284	310	316
Australia	92	125	111	115	122
New Zealand	20	24	26	24	25
Japan	22	31	19	19	16
Other Asia	63	79	71	79	86
Africa	32	42	39	48	39
South/Central America	21	19	19	24	28
Total Overseas	6,178	6,384	6,763	7,417	7,739
Northern Ireland	586	569	570	585	593
Total Out-of-State	6,764	6,953	7,333	8,002	8,332
Domestic Trips	6,657	7,001	7,173	7,310	7,942

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.

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

Source: CSO/Fáilte Ireland/NITB

Tourism Revenue 2003 – 2007

How much money did they spend?					
Revenue (€m)	2003	2004	2005	2006	2007
Britain	1,319.1	1,276.1	1,274.2	1,372.4	1,387.3
Mainland Europe	885.1	930.4	1,238.6	1,354.5	1,404.7
Germany	184.3	177.4	237.7	244.6	234.5
France	147.1	158.3	176.3	199.1	200.3
Italy	120.9	119.0	124.3	149.4	168.9
Netherlands	78.1	69.4	80.4	70.8	71.6
Other Europe	354.7	406.3	619.9	690.6	729.4
North America	787.2	772.1	738.2	815.1	823.3
Other Overseas	236.4	256.3	235.9	267.1	329.3
TOTAL OVERSEAS	3,227.7	3,234.9	3,486.9	3,809.0	3,944.6
Northern Ireland¹	175.5	174.1	178.8	190.8	202.8
Total Out of State	3,403.2	3,409.0	3,665.7	3,999.8	4,147.4
Overseas Same-day Visits	20.8	22.0	23.3	30.3	28.6
Carrier Receipts	633.0	634.0	583.0	663.0	726.0
TOTAL FOREIGN EXCHANGE EARNINGS	4,057.0	4,065.0	4,272.0	4,693.0	4,902.0
Domestic Trips	970.9	1,037.2	1,164.5	1,375.2	1,551.0
TOTAL TOURISM REVENUE	5,027.9	5,102.2	5,436.5	6,082.2	6,453.0

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.

Note:

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

Source: CSO/Fáilte Ireland/NITB

Where did tourists go and how much did they spend in 2007?								
Numbers (000s) Revenue (€m)	Britain	Mainland Europe	North America	Other Areas	Overseas Tourists	Northern Ireland Visitors	Domestic	Total
Dublin	1,743 371.9	1,711 584.2	761 321.8	235 171.8	4,449 1,449.7	178 69.7	1,138 194.6	5,765 1,714.0
East & Midlands	471 136.3	261 90.9	117 32.7	42 32.5	892 292.4	71 18.1	971 165.7	1,934 476.2
South-East	454 143.4	278 95.0	226 41.2	61 20.7	1,018 300.4	11 2.8	1,105 223.7	2,134 526.9
South-West	839 356.3	686 291.4	421 147.9	96 48.5	2,043 844.1	23 9.8	1,902 426.1	3,968 1,280.0
Shannon	485 134.9	378 114.3	296 105.7	40 13.2	1,198 368.1	30 11.2	826 138.5	2,054 517.8
West	457 163.6	593 182.3	350 139.9	77 29.6	1,476 515.4	79 32.1	1,264 270.2	2,819 817.7
North-West	214 80.9	183 46.6	115 34.1	35 12.9	547 174.5	230 59.2	736 132.2	1,513 365.9
Total Revenue	1,387.3	1,404.7	823.3	329.3	3,944.6	202.8	1,551.0	5,698.4

Overseas Tourists 2007

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	29	27	31	30	28
Other Food & Drink	34	38	32	32	30
Sightseeing/ Entertainment	5	5	5	7	5
Internal transport	10	10	10	10	10
Shopping	17	15	18	16	18
Miscellaneous	5	5	5	5	9

When did they arrive?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
January-March	18	19	19	14	15
April	8	9	8	7	7
May	9	9	8	10	9
June	10	8	10	14	10
July	12	11	12	14	13
August	12	12	12	12	12
September	9	9	9	10	12
October-December	22	23	21	19	22

Source: CSO

How did they arrive/depart?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Air					
From Britain	45	76	7	22	59
From Main. Europe	32	1	85	13	30
Transatlantic	8	*	*	58	2
Sea					
From Britain	12	21	4	3	7
From Main. Europe	1	--	2	*	*
Via N. Ireland	2	2	2	4	2

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	13	19	8	25	10
Guesthouses/B&Bs	6	7	4	12	6
Rented	36	18	45	28	38
Caravan & Camping	1	2	1	*	1
Hostels	2	1	2	4	1
Friends/ Relatives	25	45	18	15	28
Other	16	8	21	15	17
Nights (Mn)	56.3	17.8	24.4	9.6	4.5

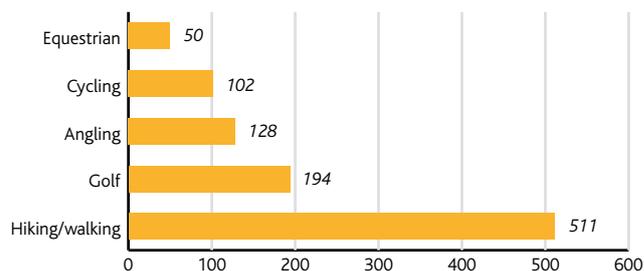
Source: SOT (* indicates less than 0.5 percent). Nights (Mn) Source CSO

What was their main reason for visiting Ireland?

(000s)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	3,993	1,778	1,378	687	150
Visit Friends/ Relatives	2,237	1,287	607	238	106
Business	1,016	525	362	88	42
Other	492	186	229	58	19

Source: CSO and NITB

What activities did they engage in? (000s)



Overseas Holidaymakers 2007

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 to Ireland?

Holidaymakers (000s)	2003	2004	2005	2006	2007
Britain	1,779	1,718	1,662	1,765	1,778
Mainland Europe	772	825	950	1,114	1,378
North America	616	656	614	670	687
Rest of World	124	167	139	163	150
Total	3,291	3,367	3,365	3,711	3,993

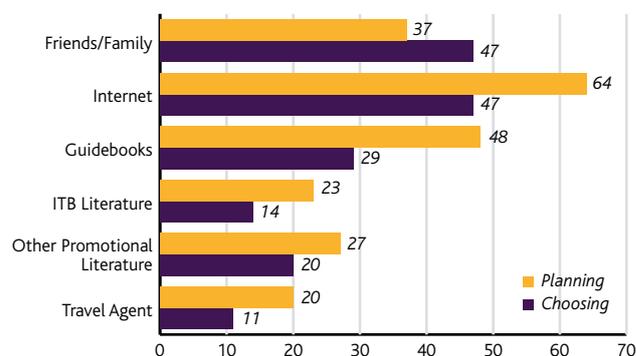
Source: CSO and NITB

Type of Holidays Taken in Ireland (000s) in 2007

Holidaymakers (000s)	Total	Britain	Mainland Europe	North America	Rest of World
Hired Car - Paid Acc ³	918	352	294	230	42
Touring - Paid Acc ³	570	281	144	127	19
Dublin Break	794	458	235	78	22
Youth Budget	306	75	138	71	22

Source: Fáilte Ireland Survey of Overseas Travellers

Source of Information for Choosing/Planning a Holiday in Ireland (%)



Source: Fáilte Ireland's Visitor Attitudes Survey

³ Paid accommodation refers to hotels, guesthouses, B&B...

How do overseas holidaymakers to Ireland use the Internet?

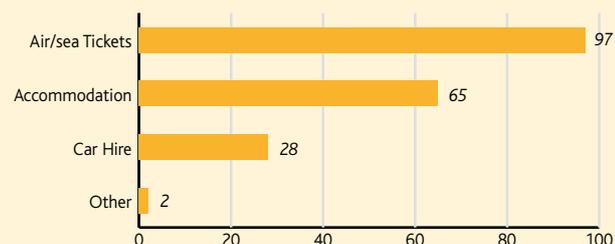
74% of overseas holidaymakers to Ireland use the internet to book or purchase some element of their holiday to Ireland. The charts below show how they used the internet in 2007.

Websites Visited (%) 2007



Source: Fáilte Ireland's Survey of Overseas Travellers

Booked/Purchased over Internet (%) 2007



Source: Fáilte Ireland's Survey of Overseas Travellers

How did they arrange their holiday?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Package*	22	14	22	33	25
Independent	78	86	78	67	75

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

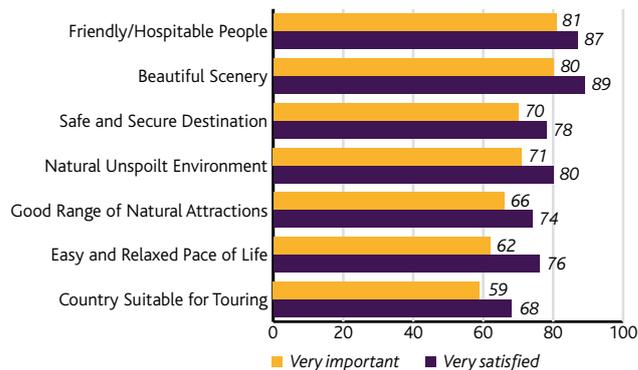
Source: Fáilte Ireland's Survey of Overseas Travellers

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

Experience of Ireland	Use of Car	Age	Social Class	Party Composition
First Visit	58 Car Brought	13 Under 25 yrs	17 Managerial/Professional (AB)	24 Alone
Repeat	38 Car Hired	33 25-34 yrs	16 White Collar (C1)	59 Couple
Irish-born	4 Car Not Used	55 35-44 yrs	16 Skilled Worker (C2)	10 Family
		45+ yrs	50 Unskilled Worker (DE)	6 Other Adult Group

Source: Fáilte Ireland's Survey of Overseas Travellers

Importance and Rating of Destination Issues (%)



Source: Fáilte Ireland's Visitor Attitudes Survey

Domestic Tourism 2007

Domestic Trips (000s) by Purpose of Travel

	2002	2003	2004	2005	2006	2007
Holiday Trips	2,819	2,933	3,142	3,348	3,827	4,271
- Long (4+ nights)	1,002	1,064	1,115	1,137	1,089	1,286
- Short (1-3 nights)	1,818	1,868	2,028	2,212	2,738	2,984
VFR Trips	2,286	2,291	2,420	2,298	2,254	2,420
Business Trips	583	619	624	770	761	711
Other Trips	763	814	815	757	468	541
Total Trips	6,452	6,657	7,001	7,173	7,310	7,943

Domestic Expenditure (€m) by Purpose of Travel

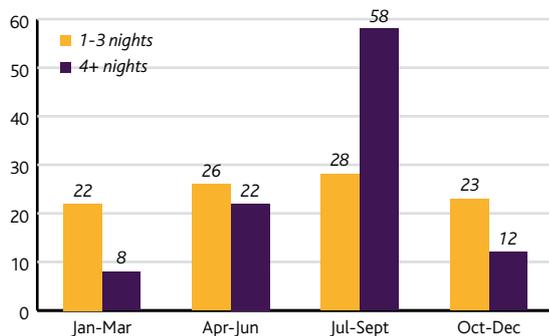
	2002	2003	2004	2005	2006	2007
Holiday	501.6	575.9	624.9	706.8	872.7	1,028.1
- Long (4+ nights)	260.6	312.4	326.4	344.6	376.4	473.4
- Short (1-3 nights)	241.0	263.5	298.5	362.2	496.3	554.7
VFR	97.2	114.0	121.1	142.4	181.8	219.7
Business	152.9	157.6	162.5	188.3	227.3	194.1
Other	97.7	123.4	128.7	127.0	93.4	109.1
Total Expenditure	849.4	970.9	1,037.2	1,164.5	1,375.2	1,551.0

Source: CSO Household Travel Survey

Accommodation Bednights Domestic Holidaymakers (%)

	2002	2003	2004	2005	2006	2007
Hotels	30	30	29	31	32	33
Guesthouse/B&Bs	9	8	7	7	6	5
Caravan/Camping	13	13	11	10	11	12
Rented	21	23	23	22	19	19
Holiday Home	12	10	14	14	15	16
Friends/Relatives	10	11	13	11	14	11
Other	4	4	4	4	3	4

Seasonality (%) 2007 by Length of Stay



Activities Engaged In (%)

	2007
National Parks	28
Houses/Castles	26
Watersports	24
Hiking/Walking	21
Visits to Spas	20
Gardens	19
Heritage/Interpretive Centres	17
Museums/Art Galleries	16
Golf	10
Angling	8
Cycling	6
Equestrian Pursuits	3

The Tourism Product

Attendances at Popular Visitor Attractions in Ireland 2007

Fee-charging Attractions

Name of Attraction	County	2007
Guinness Storehouse	Dublin	946,577
Cliffs of Moher Visitor Experience	Clare	940,455
Dublin Zoo	Dublin	900,005
Book of Kells	Dublin	567,632
National Aquatic Centre	Dublin	565,085
Blarney Castle	Cork	401,567
St Patrick's Cathedral	Dublin	388,559
Fota Wildlife Park	Cork	362,792
Bunratty Castle & Folk Park	Clare	344,000
Waterford Crystal Visitor Centre	Waterford	312,000

Free Attractions

Name of Attraction	County	2007
The National Gallery of Ireland	Dublin	740,407
Irish Museum of Modern Art	Dublin	485,000
National Museum of Archaeology & History	Dublin	407,202
National Museum of Decorative Arts & History	Dublin	374,347
Holy Cross Abbey	Tipperary	260,000
Chester Beatty Library	Dublin	252,000
St Mel's Cathedral	Longford	250,000
National Museum of Country Life	Mayo	113,430
National Museum of Ireland – Natural History	Dublin	108,615
The National Library of Ireland	Dublin	96,572

Source: Fáilte Ireland Visitor Attractions Surveys

Accommodation in 2007 *

	Premises	Rooms
Hotels	857	51,322
Guesthouses	387	4,429
Farmhouses and Town & Country Homes**	2,872	11,871
Self-Catering***	3,673	9,985
University Accommodation	15	3,051
Hostels****	138	7,922

*Source Gulliver (April 2007):

** includes specialist and pub accommodation

*** Registered group scheme only.

****Two hostel beds constitute one room

Accommodation Occupancy in 2007

	%
Hotel Room Occupancy (Jan-Dec)	64
Guesthouse Room Occupancy (Apr-Oct)	63
B&Bs Room Occupancy (Apr-Oct)	48
Hostels Bed Occupancy (Apr-Oct)	64

Source: Fáilte Ireland Occupancy Surveys



Fáilte Ireland
National Tourism Development Authority