



# TOURISM FACTS 2006

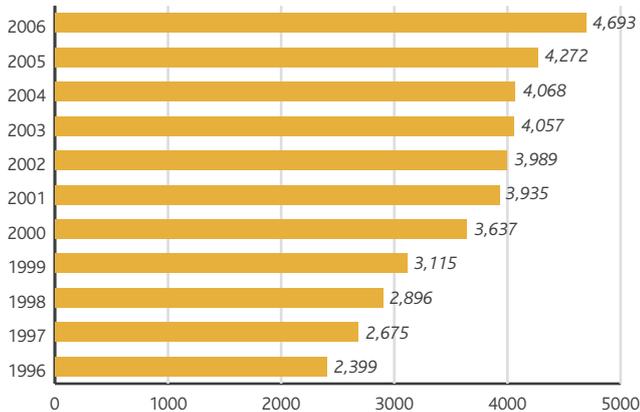


**Fáilte Ireland**  
National Tourism Development Authority

## Tourism Performance in 2006

Expenditure by visitors to Ireland (including receipts paid to Irish carriers by foreign visitors) was estimated to be worth €4.7 billion in 2006.

Total Foreign Exchange Earnings 1996-2006



Overseas tourist visits to Ireland in 2006 increased by 10% to 7.4 million. Tourist numbers from Mainland Europe recorded substantial growth of 18%, driven by both traditional markets such as Italy, Spain and France and the emerging markets in Other Europe. Poland continues to grow faster than all other European markets and is now the fourth largest market in Mainland Europe with 230,000 visitors in 2006. The volume of North American tourists grew by 11% and has virtually recovered to the record level achieved in 2000, leaving the market primed for real growth in 2007. Tourist numbers from Britain grew by 5%, representing an additional 181,000 visitors, and the other long haul markets grew by 9%, due primarily to growth in arrivals from South/Central America, Africa and Asia, with only modest growth recorded from Australia and Japan.

With the number of overseas tourists to Ireland increasing by 10% overall in 2006, this was more than twice the World Tourism Organisation's preliminary estimates for 2006 which show an increase of 4.5% in world arrivals, and it is significantly better than the 3.9% growth in European arrivals. With Europe, tourist arrivals in Northern Europe (including Ireland) in 2006 grew by an estimated 6.6%.

Preliminary estimates show that US citizen travel to Europe increased by 4.1% in 2006 which means that Ireland has increased its share of both world and European tourist arrivals and its share of US travellers to Europe.

## Economic Benefits

- In 2006, out-of-state tourist expenditure, including spending by visitors from Northern Ireland, amounted to €4 billion. With a further €0.66 billion spent by overseas visitors on fares to Irish carriers, total foreign exchange earnings were €4.69 billion.

Domestic tourism expenditure amounted to €1.4 billion making tourism in total a €6 billion industry in 2006.

- Government earned estimated revenue of €2.77 billion through taxation of tourism expenditure, of which €2.27 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 2006 the value of exported goods and services is estimated at €140.15 billion of which €4.69 billion<sup>1</sup> can be directly attributed to tourism, accounting for 3.3% of exports. Tourism goods have low import content in comparison to other exports.
- Total foreign and domestic tourism revenue of €6.09 billion in 2006 generated an overall GNP impact of €5.67 billion after applying multiplier effects (direct, indirect, induced and "Government interacting"). As a result total tourism revenue accounted for 3.8% of GNP<sup>1</sup>.
- 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.

## Employment<sup>2</sup>

- The estimated total number of people employed in the Irish tourism and hospitality industry in 2006 was 249,338, an increase of 1.4% on the numbers employed in 2005. The largest increases occurred in the Hotel and Restaurant sectors.

Numbers Employed by Sector

Sector/Year	2002	2003	2004	2005	2006
Hotels	54,656	54,164	53,637	54,095	55,768
Guesthouses	2,914	2,879	2,849	2,918	2,803
Self-Catering Accommodation	n/a	3,878	3,813	3,641	3,653
Restaurant	41,409	41,085	41,367	43,309	45,200
Non-Licensed Restaurant	n/a	15,642	15,407	16,589	16,814
Licensed Premises	80,121	79,319	92,000	88,986	87,998
Tourism Services & Attractions	34,852	34,749	35,016	36,421	37,102
<b>TOTAL</b>	<b>n/a</b>	<b>231,716</b>	<b>244,089</b>	<b>245,959</b>	<b>249,338</b>

- In 2006, Dublin accounted for 22% of tourism and hospitality employment, the remainder of the Southern and Eastern Region accounted for 49% and the Border, Midland and Western Region accounted for 29%.
- Of the more than 249,000 people employed in tourism-related services almost 203,000 are year-round employees, and of these 68% were Irish nationals and 32% were of international origin.

<sup>1</sup> Source: CSO Quarterly Survey

<sup>2</sup> Fáilte Ireland's Tourism Business and Employment Survey

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).

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*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/](http://www.tourismireland.com/corporate/)*

## Tourism Numbers 2002 – 2006

Where did Ireland's tourists come from?					
Numbers (000s)	2002	2003	2004	2005	2006
<b>Britain</b>	<b>3,452</b>	<b>3,553</b>	<b>3,526</b>	<b>3,640</b>	<b>3,821</b>
<b>Mainland Europe</b>	<b>1,378</b>	<b>1,484</b>	<b>1,582</b>	<b>1,903</b>	<b>2,252</b>
Germany	288	302	298	402	417
France	298	321	297	310	360
Italy	157	176	186	190	248
Netherlands	162	146	151	157	155
Belgium	96	85	92	84	95
Sweden/Denmark	67	78	72	98	116
Spain	113	133	157	171	198
Poland	13	17	39	125	230
Switzerland	42	51	65	54	52
Other Europe	141	174	224	312	381
<b>North America</b>	<b>844</b>	<b>892</b>	<b>956</b>	<b>937</b>	<b>1,034</b>
USA	759	809	867	854	945
Canada	85	84	89	83	89
<b>Rest of World</b>	<b>245</b>	<b>249</b>	<b>320</b>	<b>284</b>	<b>310</b>
Australia	96	92	125	111	115
New Zealand	19	20	24	26	24
Japan	22	22	31	19	19
Other Asia	64	62	79	71	79
Africa	29	32	42	39	48
Other Overseas	16	21	19	19	24
<b>Total Overseas</b>	<b>5,919</b>	<b>6,178</b>	<b>6,384</b>	<b>6,763</b>	<b>7,417</b>
Northern Ireland	557	586	569	570	585
Total Out-of-State	6,476	6,764	6,953	7,333	8,002
Domestic Trips	6,452	6,657	7,001	7,173	7,310

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.

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

Source: CSO/Fáilte Ireland/NITB

## Tourism Revenue 2002 – 2006

How much money did they spend?					
Revenue (€m)	2002	2003	2004	2005	2006
<b>Britain</b>	<b>1,283.3</b>	<b>1,319.1</b>	<b>1,276.1</b>	<b>1,274.2</b>	<b>1,372.4</b>
<b>Mainland Europe</b>	<b>866.6</b>	<b>885.1</b>	<b>930.4</b>	<b>1,238.6</b>	<b>1,354.5</b>
Germany	181.5	184.3	177.4	237.6	244.6
France	185.3	147.1	158.3	176.4	199.1
Italy	110.7	120.9	119.0	124.0	149.4
Netherlands	85.4	78.1	69.4	80.1	70.8
Other Europe	303.7	354.7	406.3	620.5	690.6
<b>North America</b>	<b>709.0</b>	<b>787.2</b>	<b>772.1</b>	<b>738.2</b>	<b>815.1</b>
<b>Other Overseas</b>	<b>228.7</b>	<b>236.4</b>	<b>256.3</b>	<b>235.9</b>	<b>267.1</b>
<b>TOTAL OVERSEAS</b>	<b>3,087.5</b>	<b>3,227.7</b>	<b>3,234.9</b>	<b>3,486.9</b>	<b>3,809.0</b>
Northern Ireland <sup>1</sup>	161.2	175.5	174.1	178.8	190.8
<b>Total Out of State</b>	<b>3,248.7</b>	<b>3,403.2</b>	<b>3,409.0</b>	<b>3,665.7</b>	<b>3,999.8</b>
Overseas Same-day Visits	17.3	20.8	22.0	23.3	30.3
Carrier Receipts	723.0	633.0	634.0	583.0	663.0
<b>TOTAL FOREIGN EXCHANGE EARNINGS</b>	<b>3,989.0</b>	<b>4,057.0</b>	<b>4,065.0</b>	<b>4,272.0</b>	<b>4,693.0</b>
Domestic Trips	849.4	970.9	1,037.2	1,164.5	1,398.3
<b>TOTAL TOURISM REVENUE</b>	<b>4,838.4</b>	<b>5,027.9</b>	<b>5,102.2</b>	<b>5,436.5</b>	<b>6,091.3</b>

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.

#### Note:

<sup>1</sup> 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 2006?								
Numbers (000s) Revenue (€m)	Britain	Mainland Europe	North America	Other Areas	Overseas Tourists	Northern Ireland	Domestic	Total
Dublin	1,864 395.8	1,483 537.1	732 303.7	226 137.6	4,306 1,374.1	163 65.4	1,207 230.7	5,676 1,670.2
East & Midlands	457 165.7	236 86.0	104 49.6	52 16.8	849 318.1	56 18.5	850 136.7	1,755 473.3
South-East	384 133.3	253 91.3	251 62.2	74 15.7	962 302.5	18 11.7	1,044 186.2	2,024 500.4
South-West	859 333.4	587 334.1	428 163.6	119 54.1	1,994 885.2	20 7.0	1,610 340.5	3,624 1,232.7
Shannon	572 140.5	332 94.7	289 64.4	59 17.1	1,253 316.8	2 0.6	751 125.5	2,006 442.9
West	449 147.3	528 164.7	352 141.7	82 15.5	1,412 469.2	57 19.8	1,229 288.4	2,698 777.4
North-West	173 56.4	152 46.6	103 29.9	31 10.3	460 143.3	278 67.8	620 90.3	1,358 301.4
<b>Total Revenue</b>	<b>1,372.4</b>	<b>1,354.5</b>	<b>815.1</b>	<b>267.1</b>	<b>3,809.0</b>	<b>190.8</b>	<b>1,398.3</b>	<b>5,398.2</b>

## Overseas Tourists 2006

### 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	32	29	36	30	30
Other Food & Drink	33	37	32	31	32
Sightseeing/ Entertainment	5	5	4	5	4
Internal transport	10	10	9	10	8
Shopping	15	14	15	18	19
Miscellaneous	5	5	3	6	7

### When did they arrive?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
January-March	17	19	17	14	16
April	9	9	8	6	7
May	9	9	10	10	8
June	10	9	10	13	11
July	11	10	12	13	13
August	12	11	12	13	12
September	9	9	8	12	10
October-December	22	23	22	18	23

Source: CSO

### How did they arrive/depart?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
<b>Air</b>					
From Britain	49	78	10	25	61
From Main. Europe	28	1	82	12	28
Transatlantic	9	1	*	57	2
<b>Sea</b>					
From Britain	12	20	4	3	7
From Main. Europe	1	--	2	*	*
<b>Via N. Ireland</b>	2	2	1	3	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	22	25	15	35	20
Guesthouses/B&Bs	12	9	13	17	11
Rented	19	15	24	13	16
Caravan & Camping	2	2	2	*	1
Hostels	3	1	5	4	4
Friends/Relatives	33	43	27	25	44
Other	9	5	14	6	4
Nights (Mn)	56.3	18.3	25.0	9.2	3.8

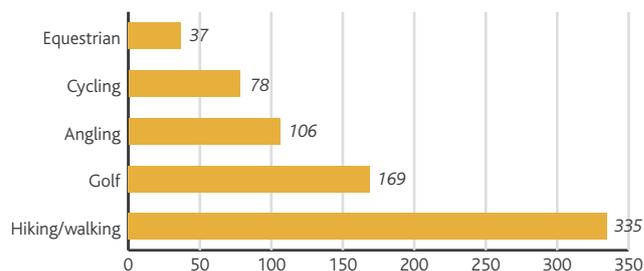
Source: CSO (\* indicates less than 0.5 percent)

### What was their main reason for visiting Ireland?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Holiday	50	46	49	65	53
Visit Friends/Relatives	31	35	27	24	32
Business	13	13	14	8	11
Other	6	5	9	4	4

Source: CSO and NITB

### What activities did they engage in? (000s)



## Overseas Holidaymakers 2006

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 in 2006?

Holidaymakers (000s)	2002	2003	2004	2005	2006
Britain	1,751	1,779	1,718	1,662	1,765
Mainland Europe	757	772	825	950	1,114
North America	579	616	656	614	670
Rest of World	130	124	167	139	163
<b>Total</b>	<b>3,216</b>	<b>3,291</b>	<b>3,367</b>	<b>3,365</b>	<b>3,711</b>

Source: CSO and NITB

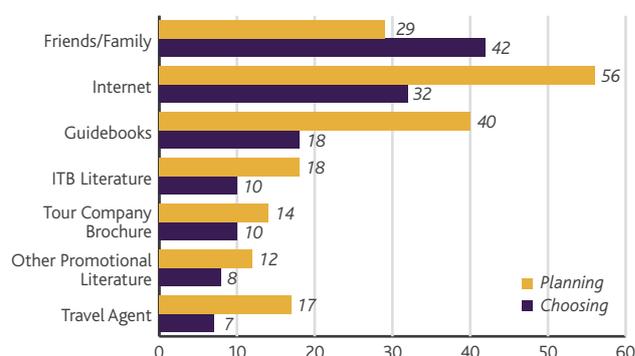
### Type of Holidays Taken in Ireland (000s) in 2006

Holidaymakers (000s)	Total	Britain	Mainland Europe	North America	Rest of World
Hired Car - Paid Acc	969	357	300	224	54
Touring - Paid Acc	547	271	131	118	24
Dublin Break	741	523	166	84	17
Youth Budget	378	97	145	88	25

Source: Fáilte Ireland SOT

Paid accommodation refers to hotels, guesthouses, B&Bs

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

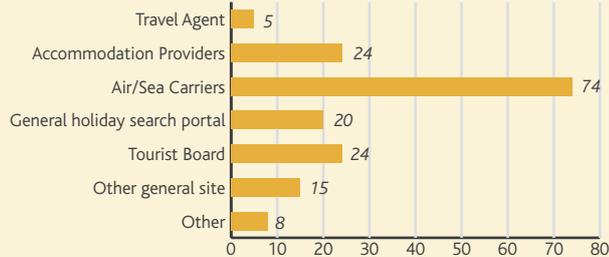


Source: Fáilte Ireland's Visitor Attitudes Survey

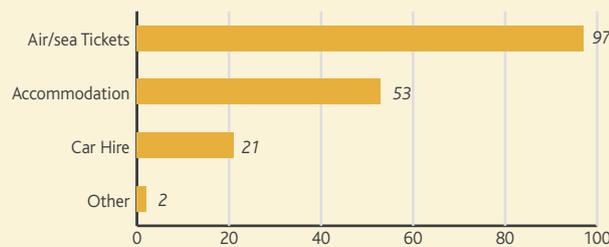
## How do overseas holidaymakers to Ireland use the Internet?

70% 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 2006.

### Websites Visited (%) 2006



### Booked/Purchased over Internet (%) 2006



Note: Base holidaymakers who used the internet to book/purchase  
Source: Fáilte Ireland's Survey of Overseas Travellers

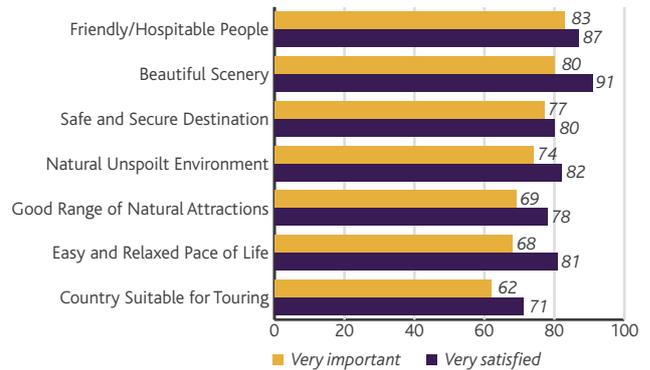
### How did they arrange their holiday?

(%)	Total	Britain	Mainland Europe	North America	Rest of World
Package*	17	11	17	26	19
Independent	83	89	83	74	81

\* 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

### Importance and Rating of Destination Issues (%)



Source: Fáilte Ireland's Visitor Attitudes Survey

## Domestic Tourism 2006

### Domestic Trips (000s) by Purpose of Travel

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

### Domestic Expenditure (€m) by Purpose of Travel

	2002	2003	2004	2005	2006
Holiday	501.6	575.9	624.9	706.8	872.7
- Long (4+ nights)	260.6	312.4	326.4	344.6	376.4
- Short (1-3 nights)	241.0	263.5	298.5	362.2	496.3
VFR	97.2	114.0	121.1	142.4	204.9
Business	152.9	157.6	162.5	188.3	227.3
Other	97.7	123.4	128.7	127.0	93.4
<b>Total Expenditure</b>	<b>849.4</b>	<b>970.9</b>	<b>1,037.2</b>	<b>1,164.5</b>	<b>1,398.3</b>

### Accommodation Bednights Domestic Holidaymakers (%)

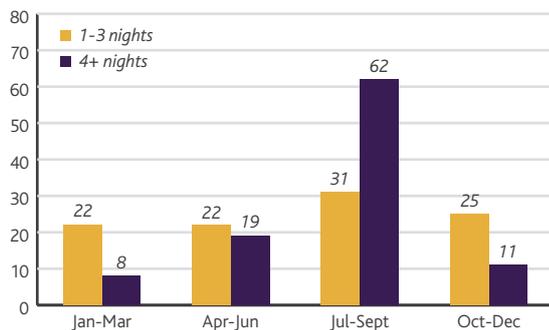
	2002	2003	2004	2005	2006
Hotels	30	30	29	31	32
Guesthouse/B&Bs	9	8	7	7	6
Caravan/Camping	13	13	11	10	11
Rented	21	23	23	22	19
Holiday Home	12	10	14	14	15
Friends/Relatives	10	11	13	11	14
Other	4	4	4	4	3

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

Experience of Ireland	Use of Car	Age	Social Class	Party Composition
First Visit	56 Car Brought	12 Under 25 yrs	21 Managerial/Professional (AB)	27 Alone
Repeat	39 Car Hired	32 25-34 yrs	18 White Collar (C1)	58 Couple
Irish-born	4 Car Not Used	56 35-44 yrs	16 Skilled Worker (C2)	11 Family
		45+ yrs	45 Unskilled Worker (DE)	5 Other Adult Group

Source: Fáilte Ireland's Survey of Overseas Travellers

### Seasonality (%) 2006 by Length of Stay



### Activities Engaged In (%)

Activity	2006 (%)
Houses/Castles	25
Gardens	21
National Parks	21
Watersports	21
Heritage/Interpretive Centres	17
Hiking/Walking	17
Golf	12
Museums/Art Galleries	11
Angling	6
Cycling	4
Equestrian Pursuits	3

## The Tourism Product

### Attendances at Popular Visitor Attractions in Ireland 2006

#### Fee-charging Attractions

Name of Attraction	County	2006
Guinness Storehouse	Dublin	858,504
Dublin Zoo	Dublin	754,208
Book of Kells	Dublin	548,691
Blarney Castle	Cork	395,454
National Aquatic Centre	Dublin	368,225
St Patrick's Cathedral	Dublin	334,976
Bunratty Castle & Folk Park	Clare	330,763
Waterford Crystal Visitor Centre	Waterford	310,000
Fota Wildlife Park	Cork	299,119
Rock of Cashel	Tipperary	244,515

#### Free Attractions

Name of Attraction	County	2006
Cliffs of Moher Visitor Centre	Clare	911,876
The National Gallery of Ireland	Dublin	756,510
Irish Museum of Modern Art	Dublin	435,000
National Museum of Archaeology & History	Dublin	368,692
Holy Cross Abbey	Tipperary	260,000
Chester Beatty Library	Dublin	206,695
National Museum of Decorative Arts & History	Dublin	180,832
National Museum of Ireland – Natural History	Dublin	148,894
National Museum of Country Life	Mayo	100,645
Nicholas Mosse Pottery	Kilkenny	80,000

Source: Fáilte Ireland Visitor Attractions Surveys

### Accommodation in 2006 \*

	Premises	Rooms
Hotels	812	45,873
Guesthouses	409	4,632
Farmhouses and Town & Country Homes**	3,110	12,908
Self-Catering***	3,234	8,610
University Accommodation	13	2,504
Hostels****	147	8,288

\*Source Gulliver (April 2006)

\*\* includes specialist and pub accommodation

\*\*\* Registered group scheme only

\*\*\*\*Two hostel beds constitute one room

### Accommodation Occupancy in 2006

	%
Hotel Room Occupancy (Jan-Dec)	64
Guesthouse Room Occupancy (Apr-Oct)	61
B&Bs Room Occupancy (Apr-Oct)	46
Self-Catering Unit Occupancy (Apr-Oct)	48
Hostels Bed Occupancy (Apr-Oct)	70

Source: Fáilte Ireland Occupancy Surveys



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