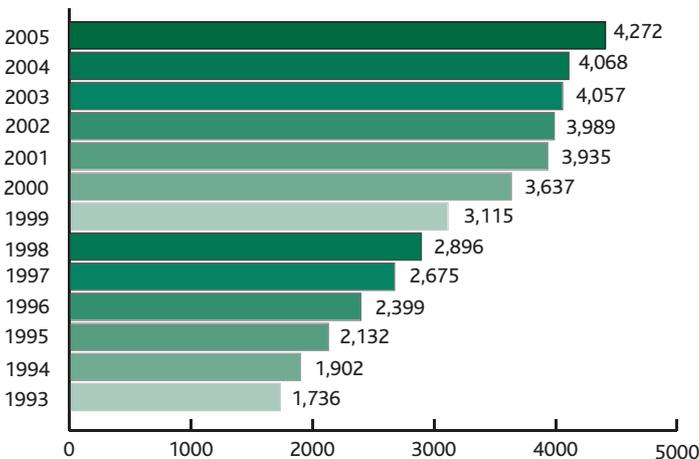


# Tourism Facts 2005

## Tourism Performance in 2005

Expenditure by visitors to Ireland (including receipts paid to Irish carriers by foreign visitors) was estimated to be worth €4.3 billion in 2005.

### Total Foreign Exchange Earnings 1993-2005 (€m)



Overseas tourist visits to Ireland in 2005 increased by 6% to 6.8 million. Tourist numbers from Britain increased by 3%, Mainland Europe recorded substantial growth of 20%, driven by Germany and Other Europe. However, the volume of North American tourists fell by 2% and remains well below the record level of 958,000 achieved in 2000. Visitors from the other long haul markets fell by 11%, following a strong increase in 2004. Poland has been included in overseas markets for the first time and according to estimates is now the sixth largest market in Mainland Europe with 125,000 visitors in 2005.

With the number of overseas tourists to Ireland increasing by 6% overall in 2005, this is on a par with the World Tourism Organisation's preliminary estimates for 2005 which show an increase of 5.5% in world arrivals, and it is a stronger performance than the 4% growth in European arrivals.

## Economic Benefits

In 2005, out-of-state tourist expenditure, including spending by visitors from Northern Ireland, amounted to €3.7 billion. With a further expenditure of €0.6 billion by overseas visitors on fares to Irish carriers, total foreign exchange earnings were €4.3 billion. Domestic tourism expenditure amounted to €1.16 billion making tourism in total a €5.4 billion industry in 2005.

Government earned estimated revenue of €2.5 billion through taxation of tourism expenditure, of which €2.1 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 2005 the value of exported goods and services was estimated at €127.2 billion<sup>1</sup> of which €4.3 billion can be directly attributed to tourism, accounting for 3.4% of exports. Tourism goods have low import content in comparison to other exports.

Total foreign and domestic tourism revenue of €5.4 billion in 2005 generated an overall GNP impact of €5.09 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 2005 was 245,959, little changed on the numbers employed in 2004.

### Numbers Employed by Sector, 2001-2005

Sector/Year	2001	2002	2003	2004	2005
Hotels	54,275	54,656	54,164	53,637	54,095
Guesthouses	2,943	2,914	2,879	2,849	2,918
Self-Catering Accommodation	3,830	n/a	3,878	3,813	3,641
Restaurant	41,827	41,409	41,085	41,367	43,309
Non-Licensed Restaurant	13,849	n/a	15,642	15,407	16,589
Licensed Premises	78,225	80,121	79,319	92,000	88,986
Tourism Services & Attractions	34,568	34,852	34,749	35,016	36,421
<b>TOTAL</b>	<b>229,517</b>	<b>n/a</b>	<b>231,716</b>	<b>244,089</b>	<b>245,959</b>

Note: Licensed Premises Revised in 2004

In 2005, Dublin accounted for 21% of tourism employment, the remainder of the Southern and Eastern Region accounted for 49% and the Border, Midland and Western Region accounted for 30%.

Of the 246,000 people employed in tourism-related services almost 200,000 were year-round employees, and of these 73% were Irish nationals and 27% were of international origin.

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

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

## Tourism Numbers 2001-2005

Where did Ireland's tourists come from?					
Numbers (000s)	2001	2002	2003	2004	2005
<b>Britain</b>	<b>3,340</b>	<b>3,452</b>	<b>3,553</b>	<b>3,526</b>	<b>3,640</b>
<b>Mainland Europe</b>	<b>1,336</b>	<b>1,378</b>	<b>1,484</b>	<b>1,582</b>	<b>1,903</b>
Germany	285	288	302	298	402
France	280	298	321	297	310
Italy	157	157	176	186	190
Netherlands	182	162	146	151	157
Belgium	75	96	85	92	84
Sweden/Denmark	81	67	78	72	98
Spain	100	113	133	157	171
Poland	11	13	17	39	125
Switzerland	38	42	51	65	54
Other Europe	127	141	174	224	312
<b>North America</b>	<b>903</b>	<b>844</b>	<b>892</b>	<b>956</b>	<b>937</b>
USA	829	759	809	867	854
Canada	74	85	84	89	83
<b>Rest of World</b>	<b>261</b>	<b>245</b>	<b>249</b>	<b>319</b>	<b>284</b>
Australia	111	96	92	125	111
New Zealand	26	19	20	24	26
Japan	22	22	22	31	19
Other Asia	58	64	62	79	71
Africa	32	29	32	42	39
Other Overseas	12	16	21	19	19
<b>Total Overseas</b>	<b>5,840</b>	<b>5,919</b>	<b>6,178</b>	<b>6,384</b>	<b>6,763</b>
<b>Northern Ireland</b>	<b>513</b>	<b>557</b>	<b>586</b>	<b>569<sup>1</sup></b>	<b>570</b>
<b>Out-of-State</b>	<b>6,353</b>	<b>6,476</b>	<b>6,764</b>	<b>6,953</b>	<b>7,333</b>
<b>Domestic Trips</b>	<b>6,307</b>	<b>6,452</b>	<b>6,657</b>	<b>7,001</b>	<b>7,173</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.

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

<sup>1</sup> Revised.

Source: CSO/Fáilte Ireland/NITB.

## Tourism Revenue 2001-2005

How much money did they spend?					
Revenue (€m)	2001	2002	2003	2004	2005
<b>Britain</b>	<b>1,210.6</b>	<b>1,283.3</b>	<b>1,319.1</b>	<b>1,276.1</b>	<b>1,274.2</b>
<b>Mainland Europe</b>	<b>814.6</b>	<b>866.6</b>	<b>885.1</b>	<b>930.4</b>	<b>1,238.6</b>
Germany	197.2	181.5	184.3	177.4	237.6
France	161.8	185.3	147.1	158.3	176.4
Italy	111.8	110.7	120.9	119.0	124.0
Netherlands	78.8	85.4	78.1	69.4	80.1
Other Europe	265.0	303.7	354.7	406.3	620.5
<b>North America</b>	<b>717.5</b>	<b>709.0</b>	<b>787.2</b>	<b>772.1</b>	<b>738.2</b>
<b>Other Overseas</b>	<b>209.0</b>	<b>228.7</b>	<b>236.4</b>	<b>256.3</b>	<b>235.9</b>
<b>Total Overseas</b>	<b>2,951.7</b>	<b>3,087.5</b>	<b>3,227.7</b>	<b>3,234.9</b>	<b>3,486.9</b>
<b>Northern Ireland<sup>1</sup></b>	<b>142.8</b>	<b>161.2</b>	<b>175.5</b>	<b>174.1<sup>2</sup></b>	<b>178.8</b>
<b>Total Out-of-State</b>	<b>3,094.5</b>	<b>3,248.7</b>	<b>3,403.2</b>	<b>3,409.0</b>	<b>3,665.7</b>
Overseas Same-day Visits	20.5	17.3	20.8	22.0	23.3
Carrier Receipts	820.0	723.0	633.0	628.0	583.0
<b>TOTAL FOREIGN EXCHANGE EARNINGS</b>	<b>3,935.0</b>	<b>3,989.0</b>	<b>4,057.0</b>	<b>4,059.0</b>	<b>4,272.0</b>
Domestic Trips	879.9	849.4	970.9	1,037.2	1,164.5
<b>Total Tourism Revenue</b>	<b>4,814.9</b>	<b>4,838.4</b>	<b>5,027.9</b>	<b>5,096.2</b>	<b>5,436.5</b>

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: <sup>1</sup> Northern Ireland revenue includes expenditure on same-day visits by Northern Ireland residents.

<sup>2</sup> Revised.

Source: CSO/Fáilte Ireland/NITB.

Where did tourists go and how much did they spend in 2005?				
Regional Numbers (000s) and Revenue (€m)				
Numbers (000s) Revenue (€ m)	Overseas Tourists	N. Ireland	Domestic	Total
Dublin	3,937 1,281.8	178 55.7	1,054 168.1	5,169 1,505.6
Midlands/East	843 295.0	35 8.4	900 112.7	1,778 416.1
South-East	943 252.3	9 2.8	1,099 180.6	2,051 435.7
South-West	1,717 733.3	46 19.0	1,525 275.6	3,288 1,027.9
Shannon	1,002 293.3	31 11.5	713 102.0	1,746 406.8
West	1,235 441.1	60 27.1	1,232 230.1	2,527 698.3
North-West	489 190.1	211 54.2	650 95.4	1,350 339.7
<b>Total Revenue</b>	<b>3,486.8</b>	<b>178.8</b>	<b>1,164.5</b>	<b>4,830.2</b>

Note: Due to the change in composition of the Shannon and South West Regions in 2005 - North Kerry, formerly part of the Shannon region, was absorbed by the South West Region - it is inappropriate to compare previous years' data for these regions

## Overseas Tourists 2005

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	27	32	29	29
Other Food & Drink	35	40	34	30	31
Sightseeing/Entertainment	5	4	5	6	5
Internal Transport	9	9	9	10	8
Shopping	18	16	17	20	20
Miscellaneous	4	3	4	4	8

When did they arrive?					
(%)	Total	Britain	M.Europe	N.America	Rest of World
January-March	18	20	16	15	15
April	8	8	8	6	6
May	9	8	9	10	9
June	10	9	11	13	12
July	12	10	14	14	12
August	12	12	12	12	13
September	9	9	8	11	11
October-December	22	23	22	19	22

Source: CSO.

### How did they arrive/depart?

(%)	Total	Britain	M.Europe	N.America	Rest of World
Air					
From Britain	49	72	15	27	64
From M. Europe	24	1	74	9	25
Transatlantic	9	1	*	59	2
Sea					
From Britain	15	23	6	3	8
From M. Europe	1	-	3	*	*
Via N. Ireland	2	3	1	2	2

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

### Where did they stay? (Distribution of Bednights)

(%)	Total	Britain	M.Europe	N.America	Rest of World
Hotels	21	24	15	34	13
Guesthouses/B&Bs	13	10	14	17	12
Rented	20	14	27	15	18
Caravan & Camping	2	2	3	*	1
Hostels	3	1	4	3	5
Friends/Relatives	32	44	24	25	42
Other	9	6	13	6	10
Nights (Mn)	50.7	17.5	20.6	8.8	3.8

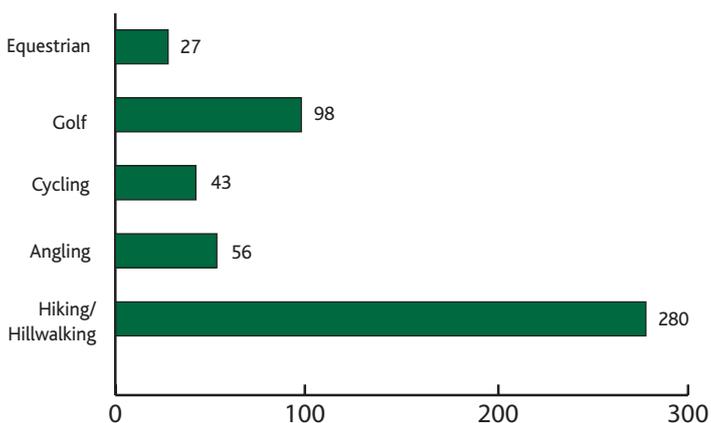
Source: CSO (\*indicates less than 0.5 percent)

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

(%)	Total	Britain	M.Europe	N.America	Rest of World
Holiday	50	46	50	66	49
Visit Friends/Relatives	31	37	24	23	35
Business	13	12	17	7	12
Other	6	6	9	4	5

Source: CSO and NITB.

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



## Overseas Holidaymakers 2005

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 2005?

(000s)	Total	Britain	M'land 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
2005	3,365	1,662	950	614	139

Source: CSO and NITB.

### How did they arrange their holiday?

(%)	Total	Britain	M.Europe	N.America	Rest of World
Package*	21	15	22	32	18
Independent	79	85	78	68	82

\* 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	55	38	65	68	74
Repeat	39	50	33	30	20
Irish-Born	6	11	2	1	6

### Did they use a car?

(%)	Total	Britain	M.Europe	N.America	Rest of World
Car Brought	13	21	11	1	8
Car Hired	28	16	31	44	32
Car Not Used	59	63	58	55	60

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

Age	Social Class	Party Composition
Under 25 yrs	22 Managerial/Professional (AB)	20 Alone
25-34 yrs	19 White Collar (C1)	60 Couple
35-44 yrs	19 Skilled Worker (C2)	16 Family
45+ yrs	41 Unskilled Worker (DE)	4 Other Adult Group

### The Tourism Product: Accommodation in 2005 \*

	Premises	Rooms
Hotels	854	45,773
Guesthouses	448	5,115
Farmhouses and Town & Country Homes**	3,161	13,275
Self-Catering***	3,000	7,841
University Accommodation	13	2,568
Hostels****	167	4,734

\* Source Gulliver (April 2005).

\*\* Includes specialist and pub accommodation.

\*\*\* Registered group scheme only.

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



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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