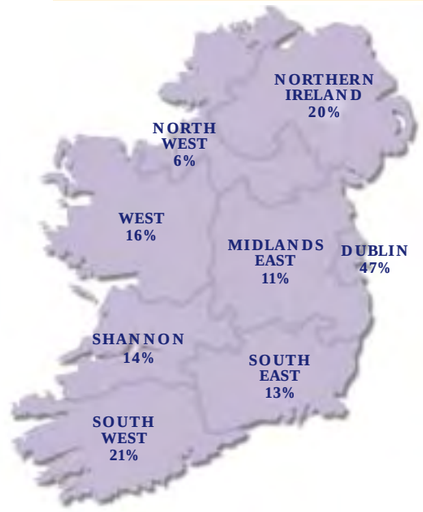
REGIONS VISITED

In what regions did Overseas Visitors to the island stay?

	Visitor Numbers (000s)		Revenue €m	Revenue £m
Dublin	3,308	47%	1,103	684
South West	1,504	21%	537	333
Northern Ireland	1,411	20%	392	243
West	1,124	16%	408	253
Shannon	963	14%	306	190
South East	887	13%	260	161
Midlands East	762	11%	329	204
North West	416	6%	144	89

Almost half of all visitors to the island of Ireland overnighted in the Dublin region, which secured one third of all tourism revenue. The South West and Northern Ireland were the next most popular regions with one in five staying at least one night in each region. The total number of visits shown (10,375,000) above is greater than the island of Ireland total visitor estimate (7,061,000) as many visited more than one region during their stay.

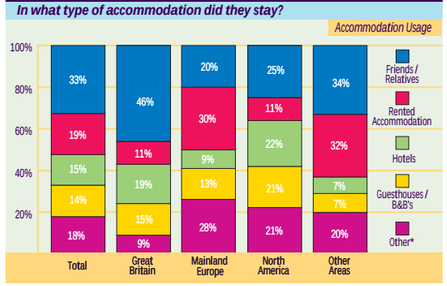
Percentage of Visitors to the island of Ireland who overnighted within this region



Note: Northern Ireland: Fermanagh, Antrim, Tyrone, Londonderry, Armagh, Down. North West: Cavan, Donegal, Leitrim, Monaghan, Sligo. West: Galway, Mayo, Roscommon. Midlands East: Kildare, Laois, Longford, Louth, Meath, Wicklow, Offaly East, Westmeath. Shannon: Clare, Limerick, Tipperary North, Offaly West, Kerry North. South East: Carlow, Kilkenny, Tipperary South, Waterford, Wexford. South West: Cork & Kerry South.

DISTRIBUTION OF BEDNIGHTS

In what type of accommodation did they stay?



** Other includes camping and caravanning, hostels, horse drawn caravans and holiday homes.*

By far the form of accommodation most utilised by visitors was staying with friends or relatives. This is particularly true of Northern Ireland where 60% of all nights among total visitors, and 68% of British accommodation nights were spent in this type of accommodation.

TIMING OF ARRIVAL

When did they arrive?

	Total	Great Britain	Mainland Europe	North America	Other Areas
January - March	19%	21%	15%	16%	15%
April	7%	8%	7%	7%	7%
May	9%	9%	10%	10%	9%
June	10%	9%	12%	11%	10%
July	12%	11%	15%	13%	12%
August	13%	12%	14%	12%	15%
September	9%	9%	9%	10%	10%
October - December	21%	22%	18%	21%	22%

Over a third of all visits were made during the summer months June to August. More Mainland Europeans arrived during these months (41%) than those from other regions while the British showed a greater tendency to travel to the island of Ireland during the off peak months.

FAMILIARITY WITH THE ISLAND OF IRELAND

Was this their first trip to the island of Ireland?

	Total	Great Britain	Mainland Europe	North America	Other Areas
First Visit	34%	21%	53%	56%	58%
Repeat Visit	50%	57%	41%	36%	29%
Born on the Island	16%	22%	6%	9%	13%

Note: Those surveyed are divided into three groups so that the percentages of first and repeat visits do not include those persons born on the island.

Overall, half of the international visitors to the island of Ireland in 2002 were on a repeat visit. Loyalty was highest among British visitors, who also included the highest numbers of those born on the island. This was due to the significantly higher proportion of Northern Ireland born (30%) revisiting the area.

ACTIVITIES AND PASTIMES

What activities and pastimes did they engage in?

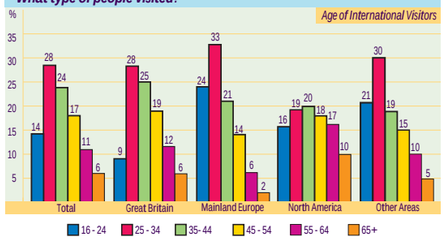
	Republic of Ireland	% of Visitors Engaging in Activities/Pastimes While Staying in Republic of Ireland	Northern Ireland	% of Visitors Engaging in Activities/Pastimes While Staying in Northern Ireland
Cultural / Historical	1,673,000	28%	189,000	13%
Walking	219,000	4%	58,000	4%
Golf	177,000	3%	34,000	2%
Cycling	103,000	2%	9,000	1%
Fishing	87,000	1%	11,000	1%
Equestrian	50,000	1%	5,000	-

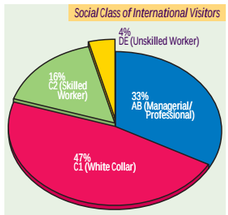
Note: The estimates for activities are based on three-year averages.

Among overseas visitors to the island of Ireland, visiting places of cultural and historic interest is the most widespread pastime. Approaching a third of all visitors to the Republic of Ireland compared to one in eight of visitors to Northern Ireland engage in this pastime.

CHARACTERISTICS OF INTERNATIONAL VISITORS

What type of people visited?





In general, the age profile of our international visitors is young with two thirds aged under 45 years. For Mainland Europeans the proportion rises to 78% while among North Americans visitors, an older age profile emerges with 45% aged 45 years or older.

Nine in ten of all North Americans and 86% of Mainland Europeans belonged to the higher income ABC1 classifications.

	Total	Great Britain	Mainland Europe	North America	Other Areas
AB (Managerial / Professional)	33%	31%	32%	41%	35%
C1 (White Collar)	47%	44%	54%	49%	54%
C2 (Skilled Worker)	16%	20%	11%	8%	9%
DE (Unskilled Worker)	4%	5%	3%	1%	2%

Tourism Ireland

Marketing the island of Ireland Overseas

Tourism Ireland is the organisation responsible for marketing the island of Ireland overseas as a tourist destination. Established under the Framework of the Belfast Agreement of Good Friday 1998 as a company, its two goals are:

- to promote increased tourism to the island of Ireland, and
- to support the industry in Northern Ireland to reach its potential.

Jointly funded by the two governments, South and North, Tourism Ireland has been fully operational since the beginning of 2002 when it launched an extensive programme to market the entire island overseas as a tourism destination.

In addition to the company's primary strategic destination marketing role, Tourism Ireland also undertakes regional/product marketing and promotional activities on behalf of Fáilte Ireland and the Northern Ireland Tourist Board through its international market offices.

The reality of partnership is the foundation stone of Tourism Ireland. It is a bond of cooperation that reaches far and wide - not only between the complementary activities of the two tourist authorities, but also between those bodies and all tourist enterprises, large and small at home and overseas.

For more information please contact:

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Web: www.tourismireland.com

All the information contained within this fact card is based on information provided by the CSO's Country of Residence Survey, Fáilte Ireland's Survey of Overseas Travellers and the Northern Ireland Tourist Board's Passenger Survey. We would like to thank the two tourist authorities and the CSO for the assistance they provided Tourism Ireland in compiling the fact card.

Ireland

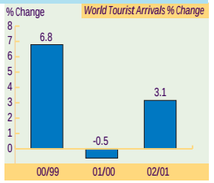
ISLAND OF IRELAND INTERNATIONAL VISITORS

FACTS & FIGURES 2002

2002 TOURISM HIGHLIGHTS

What were the highlights of 2002?

Throughout the year 2002 world tourism showed a gradual recovery from the uncertainty that predominated among travellers at the end of 2001. International arrivals grew to 715 million, +3.1% on 2001, while Europe had moderate growth (+2.4%). European arrivals reached 411 million and the region accounted for 57% of the world total.



Source: World Tourism Organisation June 2003

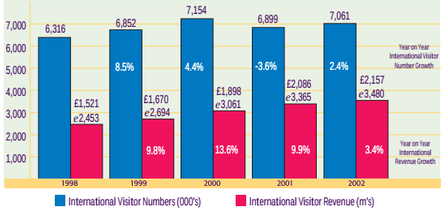
For the island of Ireland, 2002 saw overseas visitor numbers grow by 2.4%, below the world's 3.1% level but identical to the European region's growth of 2.4%. As such we managed to maintain market share despite the difficulties faced. Significant growth was achieved from the British and French markets, although visitors from the United States declined for the second year in succession and numbers from the Netherlands fell for the first time.

Ireland's revenue from overseas tourism receipts reached €3,480/£2,157 million, an increase of 3.4% on the previous year. The spend per overseas visitor for 2002 increased slightly in nominal terms, although below the rate of inflation. The number of jobs or job equivalents supported by tourism in 2002 throughout the island of Ireland is estimated at 160,000.

The outlook for 2003 is for continued growth as worldwide economic recovery becomes increasingly established throughout the year. The dual impact of the Iraq war and the outbreak of SARS disease adversely affected all tourism sectors during the first half of 2003, but the most recent prognosis from the World Tourism Barometer (WTO) is that with the SARS outbreak under control and the disappearance of uncertainty, prospects for the coming seasons are considered reasonable to good.

INTERNATIONAL VISITOR NUMBERS (000s) AND REVENUE (€ AND £ MILLION) 1998 - 2002

How many visitors came to the island of Ireland and how much did they spend?

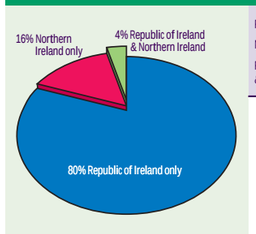


Note: Figures for 1998-2002 have been revised in line with CSO amended statistics for this period.
Note: Throughout this document £ refers to Sterling and the exchange rate used to convert Euro to Sterling is 1 Euro = 0.62 Sterling.

The number of visitors to the island of Ireland increased by 2.4% to 7,061,000. While the number of international visitors to Northern Ireland grew strongly in 2002 (+7.6%), there was a modest growth to the Republic of Ireland (+1.4%). Revenue from visitors rose by 3.4% to €3,480m / £2,157m, resulting from a 4.6% increase in the Republic which offset a decrease of 4.7% in Northern Ireland's tourism revenue.

INTERNATIONAL VISITOR NUMBERS (000s) ALL ISLAND 2002

Where did they visit?



	Share	Visitors (000s)
Republic of Ireland*	80%	5,650
Northern Ireland†	16%	1,142
Republic of Ireland & Northern Ireland#	4%	269

* *Visitors who overnighted in the Republic only (did not overnight in Northern Ireland)*

† *Visitors who overnighted in Northern Ireland only (did not overnight in the Republic of Ireland)*

\# *Visitors who overnighted in both Northern Ireland and the Republic of Ireland on the same visit*

The strong growth in the numbers of overseas visitors to Northern Ireland in 2002 has resulted in an increase in Northern Ireland's share of international visitors to the island of Ireland from 15% to 16%. Eight out of ten visitors to the island of Ireland confined their visit to the Republic of Ireland. There was a marginal increase in the number of visitors who stayed an overnight in both Northern Ireland and the Republic of Ireland.

INTERNATIONAL VISITOR NUMBERS 1998 - 2002 (000s)

Where did they come from?

	1998	1999	2000	2001	2002	% Change 2001/2002
Great Britain	3,855	4,225	4,255	4,267	4,484	5%
Mainland Europe	1,315	1,356	1,486	1,395	1,434	3%
France	272	280	291	285	305	7%
Germany	325	313	334	298	301	1%
Netherlands	146	145	183	197	176	-11%
Italy	145	166	189	161	160	-
Spain	85	80	89	105	119	13%
Nordic Countries*	129	158	163	135	112	-17%
North America	898	995	1,114	948	872	-8%
United States	816	891	996	860	779	-9%
Canada	83	105	118	87	94	7%
Other Areas	249	276	299	289	271	-6%
Australia/New Zealand	139	154	168	146	127	-13%
Total Overseas (000s)	6,316	6,852	7,154	6,899	7,061	2.4%

**Nordic countries include Sweden, Norway, Denmark, Finland, Iceland.*
Note: Figures for 1998-2002 have been revised in line with CSO amended statistics for this period.

Almost two thirds of overseas visitors came from Great Britain and the 5% growth from this market in 2002 had considerable impact on the overall outcome of Ireland's tourism performance. Growth from Mainland Europe is attributed to the combination of an increase in numbers from France, our largest Mainland European market, continued growth from Spain and a recovery in the German market. Declines in numbers from the United States accounted for the negative growth in the North American market.

INTERNATIONAL VISITOR REVENUE 1998 - 2002 (MILLIONS)

How much money did they spend?

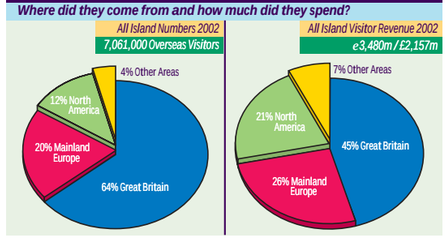
	1998		1999		2000		2001		2002		% Change 2001/2002
	e	£	e	£	e	£	e	£	e	£	
Great Britain	**1,136**	**704**	**1,251**	**776**	**1,325**	**821**	**1,515**	**940**	**1,580**	**980**	**4%**
Mainland Europe	**629**	**390**	**657**	**407**	**761**	**472**	**847**	**525**	**909**	**563**	**7%**
France	118	73	106	65	125	78	167	103	192	119	15%
Germany	166	103	166	103	180	111	204	126	191	118	-6%
Italy	76	47	95	59	94	59	115	71	113	70	-1%
Netherlands	60	37	57	36	96	59	85	53	95	59	11%
North America	**535**	**332**	**607**	**376**	**761**	**472**	**766**	**475**	**744**	**462**	**-3%**
United States	483	299	540	335	671	416	693	430	664	411	-4%
Canada	52	32	68	42	90	56	73	45	81	50	11%
Other Areas	**152**	**94**	**177**	**110**	**214**	**133**	**236**	**147**	**246**	**153**	**4%**
Total Overseas	**2,453**	**1,521**	**2,694**	**1,670**	**3,061**	**1,898**	**3,365**	**2,086**	**3,480**	**2,157**	**3.4%**

Note: The exchange rate used to convert Euro to Sterling is 1 Euro = 0.62 Sterling.
Note: Revenue excludes revenue generated from carrier receipts.

Revenue from tourism reached €3,480/£2,157 million in 2002 - growth of 3.4% on 2001. All regions with the exception of North America showed an increase.

INTERNATIONAL VISITOR NUMBERS AND REVENUE

Where did they come from and how much did they spend?



While visitors from Great Britain accounted for almost two thirds of all international visitors, their revenue contribution was less than half. The proportion of revenue generated from North American visitors was considerably higher at 21% than their share of the overall visitor numbers (12%).

How much money did they spend?

	Average	Great Britain	Mainland Europe	North America	Other Areas
Revenue Per Head	e493 £306	e352 £218	e633 £393	e854 £529	e910 £564

Note: Revenue per head was calculated by dividing the revenue per market by the number of visitors per market.

BREAKDOWN OF VISITOR EXPENDITURE

How did they spend their money?

	Total	Great Britain	Mainland Europe	North America	Other Areas
Accommodation, Food & Drink	65%	67%	69%	56%	58%
Shopping	17%	15%	15%	20%	25%
Internal Transport	9%	8%	8%	13%	8%
Sightseeing / Entertainment	5%	5%	4%	4%	5%
Miscellaneous	4%	4%	3%	7%	5%

Overall, nearly two thirds of all the money spent by international tourists to the island was on accommodation, food and drink.

This was highest among the British and Mainland European visitors to the Republic and represented a sharp rise in the proportion spent by British visitors.

Spend on shopping was highest among visitors from 'Other Areas' (25%) and North Americans (20%).

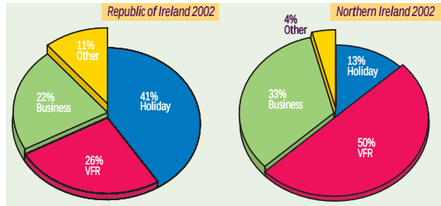
PURPOSE OF VISIT

Why were they here?

	Total	Great Britain	Mainland Europe	North America	Other Areas
Holiday	35%	28%	41%	60%	48%
VFR*	31%	38%	16%	20%	22%
Business	25%	27%	25%	13%	18%
Education/Study	3%	-	12%	3%	6%
Conference	2%	1%	2%	1%	2%
Other	4%	5%	4%	3%	4%

** VFR = Visiting Friends & Relatives.*

Over one third of all international visitors to the island of Ireland were holidaying in 2002. The proportion of North Americans who were here for a holiday was much higher than that from any other region. Britain provided the highest proportion visiting friends and relatives while those arriving for Education/Study purposes were predominantly from Mainland Europe.



In 2002 the majority of international visitors to the Republic of Ireland were holidaying while international visitors to Northern Ireland were predominantly visiting friends and relatives.

INTERNATIONAL HOLIDAYMAKER NUMBERS ALL ISLAND 1998-2002 (000s)

Where did our holidaymakers come from?

	1998	1999	2000	2001	2002	% Change 2001/2002
Great Britain	999	1,003	1,174	1,172	1,277	9%
Mainland Europe	554	574	622	579	588	1%
Germany	175	173	173	152	152	-
France	115	125	117	120	114	-5%
Netherlands	62	59	80	84	74	-11%
Italy	55	71	87	75	68	-8%
North America	505	551	656	573	530	-8%
United States	467	505	605	535	477	-11%
Canada	38	46	52	37	53	41%
Other Areas	124	127	155	149	133	-10%
Australia/New Zealand	97	100	119	100	82	-18%
Total Overseas (000s)	2,181	2,254	2,607	2,473	2,527	2.2%