

FACTS & FIGURES 2003



#### 2003 TOURISM HIGHLIGHTS

#### What were the highlights of 2003?

For the third year in succession world tourism faced events which threatened tourist confidence and lead ultimately to a worldwide decline in both numbers of arrivals at destinations, and in international tourism receipts. The early months of 2003 saw the war in Iraq followed by the outbreak of SARS both impacting on already vulnerable economies, and tourism arrivals throughout the year from all areas with the exception of Africa, stagnated. The recovery in tourism arrivals experienced in 2002 was halted and the overall effect for the year was a decline in



Source: World Tourism Organisation June 2004

both arrivals (-1.2%) and receipts (-2.2%) over 2002. The total arrivals recorded fell to 694 million. Within Europe, share was maintained at 58% of all world arrivals, 401.5 million.

For the island of Ireland, the year emerged as one of the more successful in recent times, tourist numbers reaching 7.4 million, 5.3% up on 2002 and 4% higher than the peak tourism year of 2000.

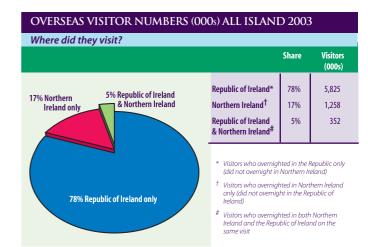
Revenue from overseas tourism receipts reached €3,636m/£2,290m an increase of 4.7% - compared to a world decline of -2.2% - on the previous year. Spend per overseas visitor declined slightly, mainly due to a fall in revenue per head of visitors from Britain and Mainland Europe.

Looking forward to the outcome for the current year 2004, conditions worldwide continue to improve. Confidence that the environment for economic growth exists has boosted prospects for outbound travel from all the major tourism generating markets. Existing intelligence for the island of Ireland reflects this worldwide trend with increased numbers of overseas visitors from all markets and prospects considered good for the remainder of the year.



Note: Throughout this document £ refers to Sterling and the exchange rate used to convert Euro to Sterling is 1 Euro = 0.63 Sterling.

The number of visitors to the island of Ireland increased by 5.3% to 7,435,000. While the number of overseas visitors to Northern Ireland grew strongly in 2003 (+14%) there was more modest growth to the Republic of Ireland (+4.4%). Revenue from overseas visitors to the island of Ireland rose by 4.7% to €3,636m/£2,290m, resulting from a 4.5% increase in the Republic and 5% increase in Northern Ireland's tourism revenue.



While the majority (78%) of overseas visitors confine their visit to the Republic of Ireland, continued recovery in the numbers to Northern Ireland in 2003 has resulted in a further increase in the proportion of visitors to the area, now at 17% compared to 15% two years ago. The proportion of visitors now staying in both Northern Ireland and Republic of Ireland has also increased.

OVERSEAS VISITOR NUMBERS 1999 - 2003 (000s)									
Where did they come from?									
	1999	2000	2001	2002	2003	% Change 2002/2003			
Great Britain	4,225	4,255	4,267	4,484	4,724	5%			
Mainland Europe	1,356	1,486	1,395	1,434	1,529	7%			
France	280	291	285	305	327	7%			
Germany	313	334	298	301	311	4%			
Italy	166	189	161	160	180	13%			
Netherlands	145	183	197	176	156	-11%			
Spain	80	89	105	119	138	16%			
Nordic Countries*	158	163	135	112	128	14%			
North America	995	1,114	948	872	910	4%			
United States	891	996	860	779	823	6%			
Canada	105	118	87	94	88	-6%			
Other Areas	276	299	289	271	272	0%			
Australia/New Zealand	154	168	146	127	121	-4%			
Total Overseas (000s)	6,852	7,154	6,899	7,061	7,435	5.3%			

<sup>\*</sup>Nordic countries include Sweden, Norway, Denmark, Finland, Iceland.

Almost two thirds of visitors to the island of Ireland arrived from Great Britain and the 5% growth from this market in 2003 had considerable impact on the overall outcome of Ireland's tourism performance.

Growth from Mainland Europe of +6.6% can be attributed to a combination of strong growth in numbers from Spain, the Nordics and Italy and continued growth from French and the German markets. The North American market has increased by 4.4% with the US numbers up 5.7% but Canadian visitor numbers decreased.

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#### OVERSEAS VISITOR REVENUE 1999 - 2003 (MILLIONs)

How much money did they spend?
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	199	9	200	00	200	01	200	)2	200	3	% Change 2002/2003
	€	£	€	£	€	£	€	£	€	£	
Great Britain	1,247	786	1,321	832	1,511	952	1,575	993	1,656	1,043	5%
Mainland Europe	657	414	760	479	846	533	908	572	918	579	1%
France	106	67	125	79	167	105	192	121	151	95	-21%
Germany	166	105	180	113	204	128	191	120	192	121	1%
Italy	95	60	94	60	115	72	113	71	124	78	10%
Netherlands	57	36	96	60	85	54	95	60	84	53	-12%
North America	606	382	760	479	765	482	744	469	809	510	9%
United States	539	340	671	423	692	436	663	418	734	462	11%
Canada	67	42	89	56	73	46	81	51	76	53	-7%
Other Areas	176	111	213	134.	236	149	246	155	252	159	2%
Total Overseas	2,687	1,693	3,055	1,925	3,358	2,116	3,473	2,188	3,636	2,290	4.7%

Note: rate of exchange 1 Euro = 0.63 Sterling.

Note: Revenue excludes revenue generated from carrier reciepts.

Revenue from tourism reached €3,636/£2,290 million in 2003 - growth of 4.7% on 2002. All major areas showed an increase with the US revenue up 10.6%. However within Europe, France and the Netherlands had negative growth.

#### **OVERSEAS VISITOR NUMBERS AND REVENUE 2003** Where did they come from and how much did they spend? All Island Numbers 2003 All Island Visitor Revenue 2003 7,435,000 Overseas Visitors €3,636m/£2,290m 7% Other Areas 4% Other Areas 12% North 22% North 46% Great Britain 21% Mainland Europe 25% Mainland 64% Great Britain Europe

While visitors from Great Britain accounted for almost two thirds of all overseas visitors to the island of Ireland their revenue contribution was less than half. The proportion of revenue generated from North American visitors was considerably higher at 22% than their share (12%) of the overall visitor numbers.

### How much money did they spend?

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	Average	Great Britain	Mainland Europe	North America	Other Areas
Revenue Per Head	€489 £308	€350 £221	€601 £378	€889 £560	€927 £584

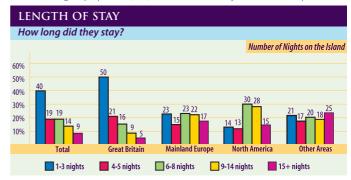
Note: Revenue per head was calculated by dividing the revenue per market by the number of visitors per market.

The average revenue per head was heavily influenced by the number of visitors to the island of Ireland from Great Britain. This had the effect of somewhat obscuring the favourable spend per head among visitors from other overseas regions.

### **BREAKDOWN OF VISITOR EXPENDITURE**

How did they spend their money?										
	Total	Great Britain	Mainland Europe	North America	Other Areas					
Accommodation, Food & Drink	62%	66%	65%	53%	59%					
Shopping	18%	17%	15%	21%	21%					
Internal Transport	10%	10%	9%	12%	8%					
Sightseeing / Entertainment	4%	3%	5%	5%	6%					
Miscellaneous	6%	5%	6%	9%	6%					

Overall, 62% of all the money spent by overseas visitors while to the island of Ireland was on accommodation, food and drink - slightly less than in 2002 (65%) but still considerably higher than in 2001 (54%). Spend on shopping was highest among visitors from Other Areas and North America (21%) while visitors from North America allocated a higher proportion (12%) of their overall outlay on internal transport.



The overall length of stay is heavily influenced by the short stay (1-3 nights) market from Great Britain both to Northern Ireland and Republic of Ireland. Eight in ten of all British visits to Northern Ireland are less than one week with 61% in the 1 to 3 night category, while 46% of British visits to the Republic are under four nights. Longest staying visitors are the North Americans with 28% staying up to fourteen nights.

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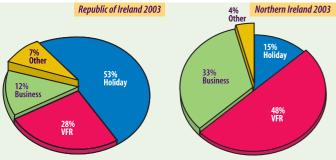
### PURPOSE OF VISIT

Why were they here?										
	Total	Great Britain	Mainland Europe	North America	Other Areas					
Holiday	45%	38%	51%	68%	47%					
VFR*	33%	39%	20%	21%	32%					
Business	16%	18%	14%	7%	11%					
Education/Study	2%	0%	8%	1%	3%					
Conference	1%	1%	1%	1%	2%					
Other	4%	3%	7%	4%	6%					

<sup>\*</sup>VFR = Visiting Friends & Relatives.

Note: Republic of Ireland figures revised as per CSO purpose of visit.

Almost half (45%) of all overseas visitors to the island of Ireland were holidaying in 2003. The proportion of North Americans who were here on a holiday exceeded those from any other region. Britain provided the highest proportion visiting friends and relatives. Business travel was highest among the British and those arriving for Education/Study purposes were predominantly from Mainland Europe.



In 2003 the majority of overseas visitors to the Republic of Ireland were holidaying while overseas visitors to Northern Ireland were predominantly visiting friends and relatives. However, 2003 saw holiday visits to Nothern Ireland increase to represent 15% of all visits, up from 13% a year previously.

# PROMOTABLE VISITORS TO THE ISLAND OF IRELAND 1999-2003 (000s)

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	1999	2000	2001	2002	2003	% Change 2002/2003
Great Britain	1,793	1,732	1,705	1,829	1,850	1%
Mainland Europe	849	913	832	850	917	8%
Germany	231	229	198	202	200	-1%
France	176	174	168	170	188	11%
Italy	124	136	119	112	132	19%
Netherlands	76	108	112	92	85	-8%
North America	659	733	640	591	623	5%
United States	607	679	601	536	575	7%
Canada	52	54	38	54	48	-10%
Other Areas	152	163	157	145	139	-4%
Australia/New Zealand	110	138	96	81	80	-2%
Total Overseas (000s)	3,453	3,541	3,333	3,415	3,528	3.3%

Tourism Ireland has concentrated its focus on those sectors of tourism that it can influence to a greater extent through its marketing and promotional activities overseas. These sectors have been defined as promotable and include those visitors from overseas

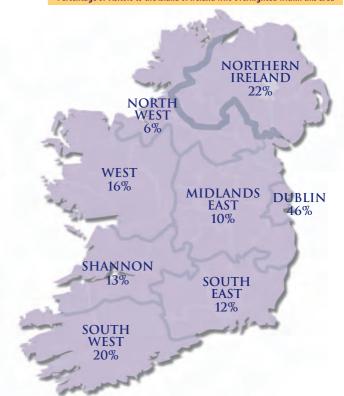
whose main purpose of visit is for a holiday, to learn English as a foreign language or to attend a conference or incentive event. AREAS VISITED

In what areas did Overseas Visitors to the	island stay?
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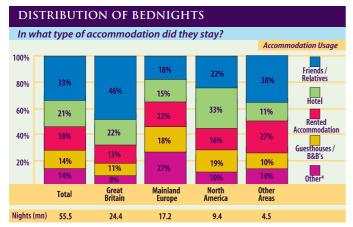
	Visitor Nun	ibers (000s)	Revenue €m	Revenue £m
Dublin	3,444	46%	1,051	662
Northern Ireland	1,610	22%	408	257
South West	1,515	20%	619	390
West	1,159	16%	457	288
Shannon	983	13%	334	211
South East	907	12%	268	169
Midlands East	775	10%	310	195
North West	476	6%	188	118

Dublin had the greatest number of overnights and highest proportion of revenue from overseas visitors in 2003. Northern Ireland became the second most visited area followed by the South West with one in five staying at least one night. All areas increased their numbers and, with the exception of Dublin and Midlands East, revenue also grew. The total number of visits shown above (10,869,000) is greater than the island of Ireland total visitor estimate (7,435,000) as many visited more than one area during their stay.

#### Percentage of Visitors to the island of Ireland who overnighted within this area



Note: Northern Ireland: Fermanagh, Antrim, Tyrone, Londonderry, Armagh, Down. North West: Cavan, Donegal, Leitrim, Monaghan, Silgo, 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.



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

The accommodation type most utilised by our overseas visitors was staying with friends and relatives, in particular among those spending time in Northern Ireland where 60% of all nights, and 65% of British accommodation nights were spent in this type of accommodation in 2003. Hotel usage is highest among North Americans (33%) and British visitors (22%), particularly those staying in the Republic of Ireland. Mainland Europeans and Other Areas visitors also favour rented accommodation.

#### TIMING OF ARRIVAL

When did they arrive?

When are they a	iiiive.				
	Total	Great Britain	Mainland Europe	North America	Other Areas
January - March	18%	20%	16%	16%	15%
April	8%	9%	8%	6%	5%
May	9%	9%	9%	10%	7%
June	9%	8%	10%	12%	11%
July	11%	10%	14%	13%	12%
August	13%	12%	15%	13%	15%
September	10%	9%	10%	11%	12%
October - December	21%	22%	18%	20%	24%

In 2003, 43% of all visits were made during the months June to September. With the exception of the British who generally show a greater tendency to travel to the island of Ireland during the off peak, approaching half of visitors from all Other Areas arrived on the island during these 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	33%	21%	53%	59%	57%
Repeat Visit	49%	57%	42%	34%	34%
Born on the Island	16%	23%	6%	8%	9%

Note: Those surveyed are divided into three groups so that the percentages of first and repeat visits do not include those persons have no the island.

Overall, half of overseas visitors to the island of Ireland in 2003 had visited the island before. Loyalty was highest among British visitors, who also included the highest numbers of those born on the island. The proportion of first time visits from North America increased to 59% from 56% in 2002. Over half of all visitors from the remaining regions were on their first visit to Ireland, while four in ten of Mainland Europeans were making a second or subsequent visit to the island.

#### **ACTIVITIES AND PASTIMES**

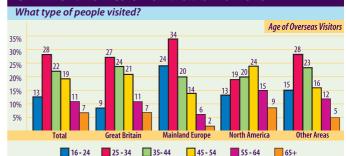
What activities and pastimes did they engage in during 2003?

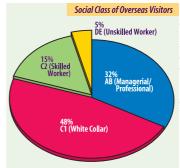
	Republic of Ireland	% of Visitors Engaging in Activities/Pastimes While Staying in Republic of Ireland	Northern Ireland	% of Visitors Engaging in Activities/Pastimes While Staying in Northern Ireland
Cultural / Historical Gardens	1,934,000 384.000	31% 6%	193,000 22,000	12% 1%
Hiking / Walking	168,000	3%	65,000	4%
Golf	134,000	2%	35,000	2%
Cycling	100,000	2%	9,000	1%
Fishing	83,000	1%	11,000	1%
Equestrian	29,000	-	4,000	-

Note: Estimates are based on annual statistics.

Among overseas visitors to the island of Ireland last year, visiting places of cultural and historical interest was the most widespread pastime. A third of all visitors to the Republic of Ireland compared to one eighth of visitors to Northern Ireland engaged in this pastime. Visiting gardens attracted 384,000 of overseas visitors to the Republic of Ireland and 22,000 to Northern Ireland in 2003. Of the more active pursuits, hiking/walking was the next most popular holiday activity and was enjoyed by visitors to both parts of the island.

#### **CHARACTERISTICS OF OVERSEAS VISITORS**





In general, the age profile of our overseas visitors was under 45 years (63%). For Mainland Europeans the proportion rose to 78% while among North American visitors, an older age profile emerged with 48% aged 45 years and older.

Nine in ten of all North Americans and 86% of Mainland Europeans belonged to the higher social classes (ABC1).

	Total	Great Britain	Mainland Europe	North America	Other Areas
AB (Managerial / Professional)	32%	31%	31%	37%	38%
C1 (White Collar)	48%	44%	55%	53%	52%
C2 (Skilled Worker)	15%	18%	12%	8%	9%
DE (Unskilled Worker)	5%	6%	2%	1%	2%

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## REPUBLIC OF IRELAND OVERSEAS TOURISM HIGHLIGHTS

REPUBLIC OF IRELAND OVERSEAS VISITORS TOURISM PERFORMANCE 1999-2003 % Change 2002/2003 Tourism Numbers (000s) 1999 2000 2001 2002 2003 **Britain** 3,430 3,428 3,340 3,452 3,553 3% 1.321 1.436 1.336 1.378 1.484 8% **Mainland Europe** 305 319 285 288 302 Germany 275 France 283 280 298 321 Italy 165 186 157 157 176 Netherlands 139 179 182 162 146 North America 950 1.056 903 844 892 6% USA 860 958 829 759 809 Canada 90 85 84 Other Areas 243 261 261 245 249 2% Australia/New Zealand 136 148 132 113 109 **Total Overseas** 5.943 6,181 5,840 5,919 6,178 4.4%

Source: Fáilte Ireland/CSO.

The Republic of Ireland's overseas visitor numbers, having increased up to 2000, suffered a decline in 2001. For the past 2 years since then, year on year growth has been achieved, with the year 2003 showing an increase of 4%. Visitor numbers in 2003 reached over 6 million with the main growth coming from the Mainland European (8%) and North American (6%) markets.

Great Britain and Mainland Europe both attained the highest numbers ever to the Republic of Ireland at 3.5 million and 1.5 million visitors respectively.

Tourism Revenue (€ms)	1999	2000	2001	2002	2003
Britain	1,012	1,088	1,211	1,283	1,319
Mainland Europe	631	727	815	867	885
Germany	161	172	197	182	184
France	102	120	162	185	147
Italy	91	90	112	111	121
Netherlands	55	92	79	85	78
North America	555	689	718	709	787
Other Overseas	145	178	209	229	236
Total Overseas	2,343	2,682	2,952	3,088	3,228

Source: Fáilte Ireland/CSO.

Revenue generated by overseas visitors to the Republic of Ireland has increased annually since 1999. In 2003, growth of 4.5% was achieved, with the North American market having the greatest increase (11%) on the previous year.

Overseas tourism in revenue terms (excluding day trips and carrier receipts) contributes over 74% of total tourism revenue in the Republic of Ireland.

A significant proportion of total accommodation bednights for the Republic of Ireland can be attributed to overseas visitors. In 2003, 67% of the 42 million bednights spent in paid accommodation in the Republic of Ireland were generated by overseas visitors.

# NORTHERN IRELAND OVERSEAS TOURISM HIGHLIGHTS

NORTHERN IRELAND OVERSEAS VISITORS TOURISM PERFORMANCE 1999-2003

Tourism Numbers (000s)	1999	2000	2001	2002	2003	% Change 2002/2003
Britain	1,002	950	1,053	1,160	1,341	16%
Mainland Europe	92	126	106	110	115	5%
Germany	23	29	23	24	28	
France	13	23	17	18	15	
Italy	11	15	8	7	12	
Netherlands	11	14	21	25	19	
North America	123	148	102	97	97	1%
USA	93	110	75	73	78	
Canada	30	38	27	23	19	
Other Areas	54	67	50	45	57	26%
Australia/New Zealand	35	42	30	26	38	
Total Overseas	1,271	1,291	1,311	1,411	1,610	14.1%

Source: Northern Ireland Tourist Roard

Since 1999, overseas visitor numbers to Northern Ireland have increased each year. Growth accelerated in 2002 with numbers increasing 7.7% on 2001 and by 2003 visits from overseas showed year on year growth of 14%.

Total overseas visits to Northern Ireland have never been higher at 1.6 million with the Great Britain market leading the growth – up 15.6% in 2003.

Tourism Revenue (£ms)	1999	2000	2001	2002	2003
Britain	161	147	189	184	212
Mainland Europe	19	21	20	26	21
Germany	5	5	4	6	5
France	3	3	3	4	3
Italy	3	3	2	2	2
Netherlands	2	2	4	6	4
North America	33	45	30	22	14
Other Overseas	20	22	17	11	10
Total Overseas	233	235	256	243	257

Source: Northern Ireland Tourist Board

Total overseas revenue generated by overseas visitors to Northern Ireland increased from £233 million in 1999 to £257 million in 2003. Between 2002 and 2003, overall growth of 5.8% was achieved, due to growth in the revenue generated from the Great Britain market (15%).

For Northern Ireland, the revenue generated by overseas tourist visits (excluding day trips and carrier receipts) contributes over 60% to the total tourism revenue in Northern Ireland.

The proportion of total accommodation bednights for Northern Ireland that can be attributed to overseas visitors in 2003 reached 7.9 million, an increase of 4.6% on 2002, 2.3 million of which were spent in the paid accommodation sectors.

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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 overseas market offices.

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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.